EVOLVING PLANS & PRIORITIES AT THE CHARITIES DIRECTORATE OF CRA, INCLUDING ONLINE SERVICES

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Presented by Tony Manconi and Stéphane Baribault
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Canada

Digital services for charities

Charities' directors or trustees can use the new digital services by logging into My Business Account (MyBA)

CRA login services

Select the service you would like to log in / register for.

My Account | My Business Account | Represent a Client

Access **your own** information:

- Individuals

Access **your business** information:

- Business owners
- Partners
- Directors/trustees on a board
- Officers of a non-profit organization

Access **someone else's** business or individual information, including your **employer**:

- Accountants
- Tax and payroll service providers
- Employees
- Legal representatives (power of attorneys, trustees, etc.)
- Family and friends

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List of directors and trustees

- Just because a director or trustee is listed on the T3010 (description) with the Charities Directorate, **doesn't** mean they will be able to access the charity's account in MyBA.
- Currently, the names in the charity's account are not necessarily matching the list of directors/trustees updated by charities every year in their returns.
- To ensure that the charity's account is up to date, charities must send a letter signed by an authorized director/trustee, with a list of all its current directors and ask that they be added as owners on the charity's account.

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Why the SIN?

- The SIN is the number that identifies a person for income tax purposes and is used for certain federal programs.
- Used by the CRA to authenticate a person when registering for the first time to the digital services.
- Also used by the CRA to authenticate a person as the director/trustee (owner) of a charity before giving access to the charity's account in MyBA.
- Not for the charity to use.

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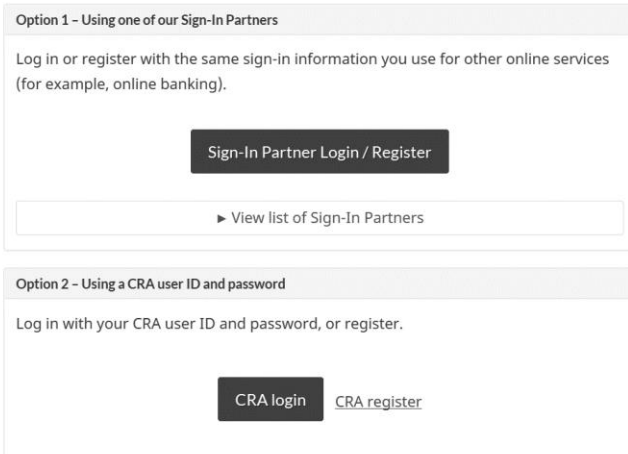
Never used CRA's digital services?

- Two ways to register and access MyBA:
  - Option 1:
  - Option 2:



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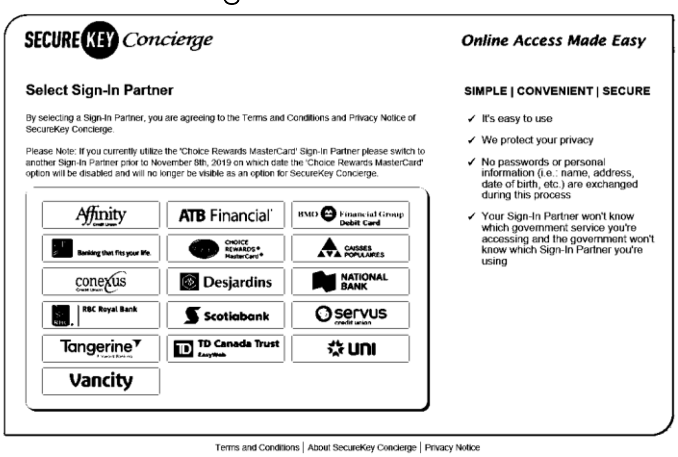
Option 1: Register through a Sign-In Partner

- Step 1 – Select your Sign-in Partner
  - Enter your regular online banking credentials to access CRA's login services



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Option 1: Register through a Sign-In Partner

- Step 2 – Provide personal information to CRA
  1. Your social insurance number (SIN)
  2. Your date of birth
  3. Your postal code or ZIP code
- We will mail you a CRA security code (5-10 days)
- Step 3 – Enter the CRA security code
  1. Return to My Business Account
  2. Select "Sign-in Partner Login" to log in with online banking credentials
  3. When prompted, enter your CRA security code
- Step 4 – Enter your charity's business number (BN)

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Option 2: Select CRA register to get a CRA user ID and password

- Step 1 – Provide personal information
  1. Your social insurance number (SIN)
  2. Your date of birth
  3. Your postal code or ZIP code
  4. An amount from your income tax and benefit returns. Have a copy of your latest returns handy. (The line amount requested will vary)
  5. Create a CRA user ID and password
  6. Create your security questions and answers
  7. Enter your charity's business number if asked
- We will mail you a CRA security code (5-10 days)

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Option 2: Select CRA register to get a CRA user ID and password

- Step 2 – Enter the CRA security code
  - Return to My Business Account
  - Select "CRA login"
  - Enter your CRA user ID and password
  - When prompted, enter your CRA security code
- Step 3 – Add your charity's BN if you haven't done it yet

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When to contact the Directorate

- You must call the Charities Directorate to access your charity's account in MyBA if:
  - You don't see your charity's business number once logged into MyBA and can't add it to your profile.
  - Your charity's registration was revoked and you want to apply for re-registration.

1-800-267-2384

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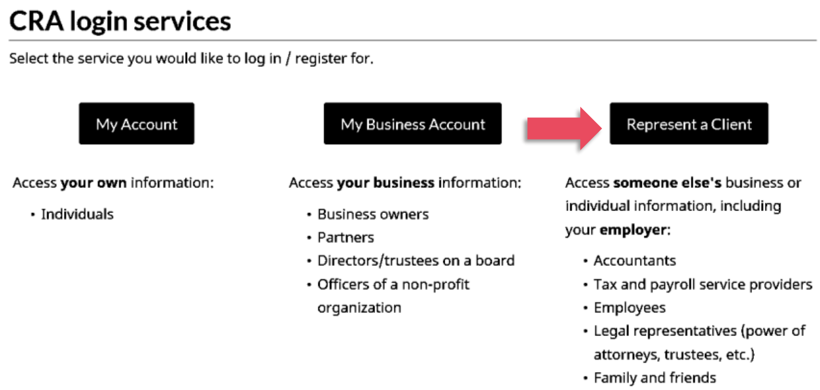
Represent a Client

- A charity can authorize a representative, an employee or an internal division to access its RR account using **Represent a Client**.



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Represent a client - permissions

- The list of services that representatives can do online on behalf of a charity varies depending on the level of authorization that the charity has consented to.
- There are three levels of authorizations:
  - view only access (level 1)
  - update and view access (level 2)
  - delegate authority, update, and view (level 3)

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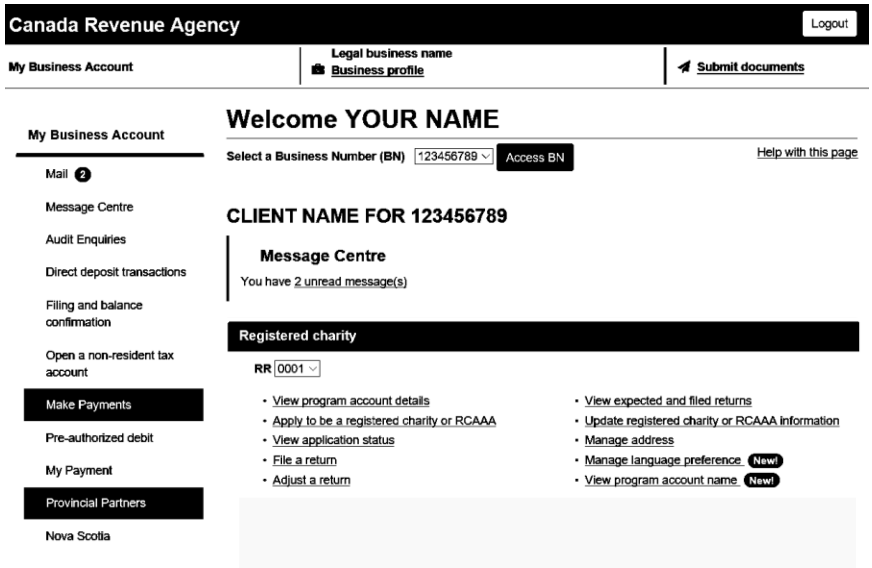
Now that you are logged in MyBA



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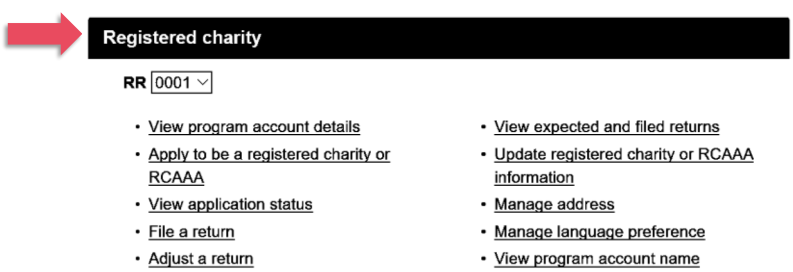
What can a charity do in MyBA?

- Scroll down to the Registered charity quadrant if your charity has multiple program accounts



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View expected and filed returns

View expected and filed returns

Fiscal period summary

BN/Account number: **123456789RZ0001**
Organization: **Demo Business**

Expected returns

Fiscal period	Due date	Status	Progress
2018-01-01 to 2018-12-31	2019-06-30	Expected	

Filed and adjusted returns

Select the return you want to view by clicking on the link in the table below.
To view, a return's status must be Processed/Filed.

Fiscal period	Date received	Status	Type	Submission period
2017-01-01 to 2017-12-31	2018-06-26	Processed/Filed	Original	Paper
2016-01-01 to 2016-12-31	2017-06-15	Processed/Filed	Original	Paper
2015-01-01 to 201512-31	2016-06-07	Processed/Filed	Original	Paper
2014-01-01 to 2014-12-31	2015-06-22	Processed/Filed	Original	Paper
2013-01-01 to 2013-12-31	2014-06-04	Processed/Filed	Original	Paper

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File a return

File a return

Fiscal periods with expected and overdue returns

BN/Account Number: **123456789RR0001**
Organization name: **Your Name**

Expected returns

Select	Fiscal period	Due date	Status	Progress
◉	2018-04-01 to 2019-03-31	2019-09-30	Expected	
○	2017-04-01 to 2018-03-31	2018-09-30	Overdue	
○	2016-04-01 to 2017-03-31	2017-09-30	Overdue	
○	2015-04-01 to 2016-03-31	2016-09-30	Overdue	
○	2015-01-01 to 2015-03-31	2015-09-30	Overdue	

Fill out the return

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T3010 return - Overview

T3010 Registered Charity Information Return

Overview

Name:	**ACCOUNT NAME FOR 123456789 RR 0001**
BN/Registration number:	**123456789RR0001**
Fiscal period:	**April 01, 2018 to March 31, 2019**

Review before you start

Is this return for you?

To assist you in filling out this form, refer to guide T4033, Completing the Registered Charity Information Return.

Note: Even if a charity is inactive, a Registered Charity Information Return must be filed to maintain its registered status.

Completing this return

All charities must file a **complete** and **accurate** return within 6 months of its fiscal period end. Failure to do so can result in revocation of its registration status.

Privacy statement

Your progress

Section	Progress	Status	Action
Basic information sheet		Not Started	Start
Section A - Identification		Not Started	Start
Section B - Directors/Trustees and Like Officials		Not Started	Start
Section C - Programs and general information		Not	Start

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Update registered charity information

Update registered charity or RCAAA information

BN/Account Number: **123456789RR0001**

Organization name: **Your Name**

*** Select the category that you would like to update (required)**

- Select
- Change director
- Change public information
- Change organization's legal name
- Change organization's fiscal period end
- Request permission to accumulate
- Change bylaws
- Change purposes and activities
- Amend governing document
- Change legal status
- Request associated status
- Change organization's designation
- Request disbursement quota reduction
- Amalgamate, merger, consolidate
- Request guidance on receipting
- Submit an enquiry
- Request voluntary revocation

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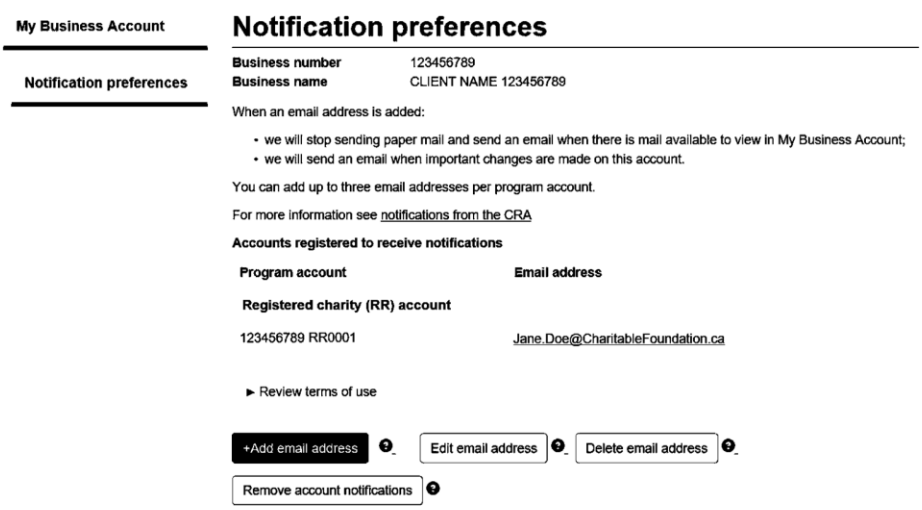
Email notifications



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More information

- Our Charities and giving webpages on Canada.ca are a great source of information to learn more about the digital services.
- Be the first one to learn about any new information posted on the website by subscribing to our Charities and giving – What's new electronic email list at:

canada.ca/cra-email-lists

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