



# THE CLIENT EXPERIENCE

Over the past year, the CRA has introduced many important changes to its administrative procedures regarding the DTC and to its communications and outreach activities. Many of these measures were introduced in response to the Committee's previous recommendations.

The changes are intended to help applicants access the DTC as well as reduce the potential for problems that may lead to delays in eligibility decisions and the need for appeals. Ideally, the entire DTC process will be more transparent, expeditious and fair.

These improved procedures are described in the second Annual Report. The highlights are presented below.

## INFORMATION

- The CRA improved the quality of information provided to applicants and the organizations and individuals who support them at both the pre-application and the application stages of DTC eligibility.
- All materials are reviewed for plain language and accessibility.
- DTC-related webpages are reviewed as part of a web optimization project.
- The CRA increased its investment in its Community Volunteer Income Tax Program. The investment will help expand its reach, particularly among organizations serving Indigenous Peoples and organizations representing persons with impairment in mental functions.

## DESIGNATED CALL LINE

- The regular CRA phone line continues to respond to basic questions, such as where to obtain and how to complete the application Form T2201 Disability Tax Credit Certificate.
- More complex questions are directed to a designated call line with specially trained staff. These questions generally relate to DTC eligibility criteria, impairment in mental functions, applications on behalf of children and DTC appeals.

## NAVIGATOR

- The CRA will introduce a new Navigator function to help individuals with complex circumstances work their way through the DTC application process.

## FORM T2201

- The CRA is developing a digital application of Form T2201. This interactive application for medical practitioners (and others):
  - streamlines the application process by ensuring the CRA gets the information it needs so applicants can get access to related financial supports
  - provides greater certainty to the application process and reduce the need for clarification letters
  - clarifies the DTC eligibility criteria for persons with disabilities and medical practitioners.
- The CRA redesigned the paper version of Form T2201, which is being tested with health providers, individuals and DTC assessors.
- The CRA is exploring selected federal and provincial/territorial programs for how they handle the treatment of certain conditions for the purpose of expedited processing.

## PROCEDURAL CHANGES

- The CRA is working to provide more information, guidelines and examples earlier in the application process in order to reduce and, ideally, eliminate the need for clarification letters.
- The CRA currently:
  - informs the applicant that they will be able to see all communications between the CRA and the health provider about their application
  - encourages the health provider to contact and consult the applicant as necessary when providing any clarification to the CRA
  - gives the health provider 60 days to respond to a clarification letter. The letter indicates that while the health provider has 45 days to respond, the case is not closed until 60 days have passed. This practice is intended to reduce processing times and associated delays.
- Better and more consistent training is provided to current and new assessors of DTC cases that involve impairment in mental functions.

## DTC-LINKED BENEFITS

- The requirement to close an RDSP when a beneficiary no longer qualifies for the DTC has been eliminated.