

CVITP Virtual Clinics

CRA Authentication Process

QUESTIONS AND ANSWERS

Q1 When should a volunteer use the CRA authentication process?

A1 This process should be used only when the following methods of authentication are **not** possible:

- Your organization or the volunteer does not know the individual and cannot confirm their identity.
- The volunteer cannot confirm the individual with information provided by AFR, after consent has been obtained to use this service.
- The volunteer cannot confirm identification visually through video conferencing.

Q2 How does the volunteer contact the CRA to initiate this process?

A2 The volunteer will send an email to VIRTUALG@cra-arc.gc.ca and include the following information:

- Date and time volunteer spoke to the individual including time zone
- Volunteer's name, province and the first three digits of their EFILE number
- Individual's name, phone number and language of correspondence
- Call back date and time requested. Please note that the CRA will make every effort to call the individual at the date and time requested, however this may not always be possible.

An email template is available in the virtual clinics guidelines for volunteers and you must limit the number of individuals requiring their identity confirmed to five per email.

Q3 When can an individual expect a call back from the CRA?

A3 They can expect a call back within two (2) business days.

Q4 What should an individual expect when they receive a CRA call back?

A4 The CRA employee will ask the individual questions to confirm their identity. As such, the volunteer may want to suggest that the individual have previous tax returns and information slips (e.g. T4, T5007, T4OAS etc.) on hand. To reassure the individual of the legitimacy of the call, the CRA employee will also provide the date of the individual's call with the volunteer.

Q5 What happens once the individual has been contacted by the CRA employee?

A5 The volunteer will receive an email from a CRA employee advising them of the outcome of the call.

- If the individual's identity is **confirmed**, the volunteer will contact them and proceed with completing their tax return(s).

- If the individual's identity is **not** confirmed, the volunteer must delete all of the individuals personal and tax information (i.e. emails, info saved to a USB, tax returns), and return all documents belonging to the individual to their organization.

Note: In cases where the individual's identity cannot be confirmed, the CRA employee will explain to them that the volunteer will **not** be able to complete their return and suggest that they visit an in-person clinic. If the individual wishes to provide additional information at a later date, they will be re-directed back to their organization.