USING AUTO-FILL MY RETURN in the CVITP QUESTIONS AND ANSWERS

Important note: Click here for information on using Auto-fill my return in a virtual clinic setting

This document is broken down into the following sections:

General Information

Q1 What is Auto-fill my return?

A1 Auto-fill my return is a secure Canada Revenue Agency (CRA) service that allows volunteers to automatically fill in parts of a taxpayer's income tax and benefit return with information that the CRA has available at the time of filing the return.

Q2 Do I have to use Auto-fill my return when completing returns for CVITP clients?

A2 No, using Auto-fill my return is optional.

Q3 What do I have to do in order to use Auto-fill my return as a volunteer with the CVITP?

A3 If you choose to use Auto-fill my return, you must;

- apply for an EFILE account or renew your existing account
- register as a CVITP volunteer and be approved
- answer "Yes" to the question on Auto-fill my return and provide your RepID when registering for the CVITP
- present your organization with a valid police records check (less than three years old)
- submit, through UFile CVITP software, an Authorization request - signature page for each taxpayer you serve using Auto-fill my return

Q4 Do I have to use UFile CVITP software to use Auto-fill my return?

A4 Yes. UFile CVITP software has been customized for use by volunteers. It's designed to electronically transmit a pre-filled Authorization request – signature page to the CRA. The page is hard-coded with the CVITP GroupID, Group name, and Level 1 authorization (view only access).

Q5 **Can I use Auto-fill my return to complete returns for prior years?**

A5 Yes. The CVITP version of UFile supports Auto-fill my return for tax years 2017, 2018, 2019, and 2020.

Q6 **Am I expected to answer questions on other tax-related matters or complete reassessments?**

A6 No. Your role as a volunteer has not changed. CVITP volunteers do not provide tax advice or request reassessments on behalf of taxpayers.

Q7 **Can Auto-fill my return be used for drop-off returns?**

A7 Yes, during the pandemic, Auto-fill my return can be used in **virtual** modified drop-off clinic situations. Please refer to the CVITP Guidelines on virtual clinics for more information.

RepIDs

Q1 What is a RepID?

A1 A RepID is a unique seven-character alphanumeric identifier that identifies an individual as a registered representative.

Q2 What if I already have a RepID? Do I need a new one for CVITP purposes?

A2 No, a person can only have one RepID. If you already have a RepID, enter it when completing the CVITP volunteer registration. If you cannot remember your RepID, or require assistance with Represent a Client, you can call the Individual tax enquiries line at 1-800-959-8281.

Q3 Why do I need to provide the CVITP with my RepID?

A3 We need your RepID so we can associate it to a special CVITP Group in Represent a Client (RaC).

Q4 What if I don't have a RepID? How do I get one?

A4 There are three ways to obtain a RepID.

1. If you do not have a RepID, but you do have a CRA user ID and password, you can use your user ID and password to register for a **RepID** on the Represent a Client page. Simply **choose the CRA login** button.

   Note - the same user ID and password can be used to access all the CRA login services such as My Account for Individuals, My Business Account, MyCRA and MyBenefits CRA (for some services, more identity information may be needed).

2. If you do not have a CRA user ID and password, **choose the CRA register** button on the Represent a Client page and follow the prompts.

   Note - you will be asked to provide your personalized access code located on the top right corner of your notice of assessment, along with your postal code. If you have not received a notice of assessment, you can call the Individual tax enquiries line at 1-800-959-8281.

3. You can also choose the **Continue to Sign-In Partner** option. This option allows you to use the same sign in information you use for other online services (for example, online banking). No passwords or personal information (i.e. name, address, date of birth, etc.) are exchanged during this process. For more information, see Sign-in Partners Help and FAQs.

Q5 Is there somewhere I can go to find more information about obtaining a CRA User ID?

A5 Yes. Help and FAQ's are available at CRA user ID and password Help and FAQs.

Q6 I already have My Account. Do I need to create a new CRA user ID and password to create my RepID?

A6 No, you do not need a new CRA user ID and password, but you will need to go to Represent a Client and enter your existing My Account user ID and password in order to register for a RepID.

Q7 Is my RepID the same as my CRA user ID and password?

A7 No, they are different. A CRA user ID and password are the same credentials you would use to access other CRA login services such as *My Account for Individuals*, *My Business Account*, *MyCRA* and *MyBenefits CRA*). A RepID identifies an individual as a registered representative.

GroupID

Q1 What is a GroupID?

A1 A GroupID identifies a group of registered representatives. As a volunteer opting to use Auto-fill my return, you will be part of the 'CVITP Group'. The CVITP GroupID will be listed as the authorized representative on the taxpayer's account and allow you to access the taxpayer's information.

Q2 How do I remove myself from the CVITP Group?

A2 If, during the 2021 filing season, you would like to be removed from the CVITP Group, contact your local CRA coordinator. You can also remove yourself from the group by signing into Represent a Client and following the instructions provided.

Q3 Will any of my personal information be accessible to the taxpayer as a result of my association to the CVITP group?

A3 No. The taxpayer will only have access to the CVITP Group information.

Q4 Does being part of the CVITP Group mean that I can make changes to a taxpayer's account?

A4 No. Through the CVITP GroupID, a volunteer will have **Level 1 Authorization**, which allows **view access only** to taxpayer information.

The authorization process

Q1 How does the taxpayer authorize me to access their information and use Auto-fill my return on their behalf?

A1 When completing an income tax return for a taxpayer, you will be required to electronically transmit an authorization request – signature page through the UFile CVITP software. The pre-populated page identifies the CVITP Group as the taxpayer's authorized representative. Before submitting the page, you will be required to print a copy and have it signed by the taxpayer. The signed copy will be kept by the taxpayer for their records, much like the TIS60 (Community Volunteer Income Tax Program Taxpayer Authorization) currently used by the program.

Q2 Will I still be able to use Auto-fill my return if I am already an authorized representative on the taxpayer's account?

A2 No. If you want to use AFR to complete a taxpayer's return **BUT** you are connected to another identifier outside of the CVITP (i.e. GroupID, RepID or BN) that has also been authorized on that taxpayer's account, you must sign into **Represent a Client**, and remove your "other" authorization(s). By doing so, you are **only** authorized under the CVITP GroupID for that taxpayer.

For example, you are authorized under your RepID, **outside of CVITP**, as an Authorized Representative for a family member but are using AFR to complete that same family member's return **under the CVITP**. In this situation, you would receive the following error message: "*You have multiple authorizations for the SIN or BN entered. You will only be able to obtain tax information if you Log in to Represent a Client*".

Q3 What happens if I try to contact the CRA on behalf of a taxpayer?

A3 Authorized volunteer representatives who are associated with the CVITP Group, will be required to provide their RepID when they call the CRA on behalf of a taxpayer. Once the call agent confirms the CVITP Group is authorized on the taxpayer's account, and verifies the volunteer's association with the CVITP Group, the volunteer will be granted access to the taxpayer's confidential information over the telephone. If the agent is *unable* to confirm that these conditions are met, taxpayers must pass confidentiality screening and provide verbal authorization to the CRA phone agent in order for the volunteer to speak to the CRA on their behalf.

Q4 Does the authorization provided through the authorization process expire?

A4 Yes. Authorization will expire at 11:59 p.m. (EST), the same day the authorization page is submitted. An error message will be generated when authorization expires before Auto-fill my return has been triggered. If this occurs, you can submit a second authorization page and continue on with the process.

Q5 Will my name be listed on the taxpayer's account as a representative?

A5 No. A volunteer's RepID will be associated to the CVITP GroupID, and the CVITP GroupID will be listed as the authorized representative on the taxpayer's account.

Police Records Checks

Q1 Why do I need a Police Records Check to use auto-fill my return?

A1 In order to use Auto-fill my return, you must be authorized by the taxpayer to act as their representative for income tax matters, allowing you increased access to the taxpayer's information. As a result, all volunteers who wish to use this service with the CVITP will be asked to provide their organization with a valid police record check (PRC).

Q2 What is a "valid" Police Records Check?

A2 To be valid, a Police Records Check must have been completed within the past three years.

The Auto-fill my return Service

Q1 Does Auto-fill my return populate the Identification and Address portions of the return?

A1 No. Auto-fill my return does not Auto fill any personal information, such as name, birthdate, SIN and address. For a comprehensive list of information Auto-fill will deliver for volunteers using this service through UFile, please go to https://www.canada.ca/en/revenue-agency/services/e-services/about-auto-fill-return.html

Note: *CDE (Client Data Enquiry) information is not accessible through UFile CVITP software.*

Q2 What happens if all of a taxpayer's info slips aren't on the CRA system?

A2 You will need to confirm with the taxpayer that the system is showing all of their information slips. Ultimately, it is the taxpayer's responsibility to ensure that all income has been reported, regardless of how the information is entered on a return.

Q3 **What happens when a taxpayer has shared income, such as T5 interest income?**

A3 A volunteer has the ability to modify any amounts that are populated by Auto-fill my return in order to account for shared income. Additionally, a volunteer has the option of selecting which income slips they would like Auto-fill my return to import.

Q4 **Can a volunteer add information slips that Auto-fill my return hasn't captured?**

A4 Yes, the tax return can be amended any time prior to filing to include additional slips, or to correct any information.

Assistance with Auto-fill my return

Q1 **If I have trouble, will the CVITP dedicated help line be able to help me recover my RepID?**

A2 No. The Individual tax enquiries line will provide assistance with any RepID or Represent a Client concerns. You can call 1-800-959-8281.

Q2 **Will the CVITP dedicated help line provide assistance if I encounter any problems while using Auto-fill my return?**

A2 Yes. The CVITP dedicated help line will be able to assist with any Auto-fill my return issues.