CRA electronic services

EFILE

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Overview

EFILE is an automated service that allows CVITP volunteers and other approved tax preparation service providers to electronically transmit individuals' tax returns to the CRA.

CVITP volunteers can use the EFILE service to transmit tax returns beginning with the 2017 tax year.

EFILE transmission services generally open in February for the majority of the year. To find the exact dates for the current year, refer to What's new this filing season – CVITP.

Registering to use EFILE

You only need to apply for an EFILE number if you intend to submit tax returns electronically. Your EFILE number must be renewed annually. To register or renew your account, go to EFILE for electronic filers and click Apply for EFILE to register or EFILE Sign in for renewing your account.

All EFILE registrations or renewals require a RepID.

- If you already have a RepID, you must provide it when you register/renew your account.
- If you do not have a RepID, you can obtain one by registering with Represent a Client.

For more information about CVITP volunteer requirements, refer to Register to volunteer.

⭐ | **Important note**

Although you will be issued an EFILE number and password as soon as you apply, your application may take up to 30 business days to process. We encourage you to submit your application before December 31 to ensure we have time to review your application before the filing season starts.

Getting ready to use EFILE

Tax returns submitted electronically must be prepared using the CVITP tax software.

If you are working on a computer that is also used by other volunteers, you must open the **EFILE-NetFile setup** and ensure that your EFILE number, password, and <u>CVITP Organization Identification Number (COIN)</u> (if available) are entered prior to completing tax returns. You must do this every time you use a shared computer.

To set up EFILE, refer to <u>EFILE-NetFile setup</u>.

⭐ | **Important note**

Never use another volunteer's EFILE number and password to file a tax return.

EFILING the tax return

There are a number of steps to follow in the tax software to successfully transmit a tax return using EFILE. For screen-by-screen instructions, refer to <u>EFILING the tax return</u>.

In order to complete prior year tax returns with the tax software, you must install the applicable version for each year you wish to prepare. If you are preparing prior year tax returns, select **Yes** from the **Will you be using EFILE to submit a prior year federal return, today or within the next two days?** drop-down menu.

⭐ | **Important note**

You cannot transmit tax returns electronically for tax years prior to 2017. However, you can still use the tax software to complete tax returns as far back as ten calendar years and then print them so the individual can submit them by mail to CRA. For information on how to print tax returns, refer to <u>Saving and printing tax returns</u>.

When preparing previous year tax returns, it is recommended that you begin with the oldest year and continue in order.

Once you complete all steps to EFILE the tax return and click **File my return now!**, the tax software connects directly to the CRA to transmit the tax return. It may take a few minutes to transmit because the system conducts an initial review on each tax return transmitted.

For screen-by-screen instructions on accepted or rejected EFILE transmissions, refer to EFILING the tax return.

Remember that you must obtain the individual's authorization to submit their tax return electronically. For more information, refer to Getting authorization to electronically submit the tax return.

Verifying EFILE transmission errors

If a tax return has not been accepted, the report will show that it was **Rejected** and give the error codes.

The most common situations that generate an error code are:

- the individual's first or last name is incorrect
- the individual's date of birth is incorrect
- a mandatory field has not been filled out
- the return has already been submitted

For a detailed explanation and to find out how to resolve error codes when filing tax returns electronically, refer to the RC4018, Electronic Filers Manual (Chapter 2).

Be sure to correct the information as instructed in the manual. When it is done, you can try to re-transmit the tax return again.

Note that a tax return can be rejected several times with different error codes.

If you cannot find an error code in the manual, or you need additional help to resolve it, contact your designated <u>EFILE Helpdesk support</u>.

When you attempt to re-transmit a tax return after you correct an error, ensure that you have received either a green **Accepted** status, or a red **Rejected** status in the **Federal EFILE Report** generated by the tax software.

It is possible to save a tax return, but it should be done only if necessary. If you have to save a tax return, refer to <u>Saving a tax return</u> and <u>Returning and clearing information</u>.

If the problem cannot be resolved, print a paper copy of the tax return for the individual and instruct them to mail it to CRA for processing.

For more information on how to print a tax return, refer to <u>Printing a tax return</u>. To ensure you provide the individual with the correct mailing address for their applicable Tax Centre, refer to <u>Find a CRA address</u>.