

2022-2023 CVITP New EFILE Registration Job Aid

1. To complete your 2022-23 CVITP New EFILE registration, visit www.canada.ca/efile and click “Apply For EFILE.”

EFILE for electronic filers

T1 EFILE

The EFILE and ReFILE services are open for transmission from **February 21, 2022 at 8:30 a.m. (Eastern time), until January 27, 2023**. You can electronically file your clients 2017, 2018, 2019, 2020, and 2021 initial personal income tax and benefit returns using the EFILE service and you can file your clients amended T1 returns for 2018, 2019, 2020, and 2021 using ReFILE.

T3 Trust Internet Filing vs T3 EFILE

For a list of T3 Trust returns that can use internet filing, visit the [Trust Internet Filing](#) web page for more information along with [Restrictions for online filing](#). For T3 electronic trust returns such as T3RET, T3ATH-IND, T3M, T3S or T3RCA to be filed using EFILE, visit [How to file a T3 return](#) along with [T3 EFILE exclusions](#) and the [T3 EFILE certified software web page](#). If you need a trust account number, visit our [Trust Account Registration](#) online service. The T3 EFILE service is now open!

To participate in the Community Volunteer Income Tax Program (CVITP)

You must **first** register as a volunteer with the CVITP at canada.ca/taxes-volunteer. If you intend on transmitting returns by EFILE under the CVITP, you must also **apply** for an EFILE number.


T2 Corporation Internet Filing

Do not register for EFILE if you are only filing your own T2 Corporation income tax return. Visit the [Corporation Internet Filing](#) web page for more information.

Overview

EFILE is an automated service that allows approved tax preparation service providers and [discounters](#) to send individual income tax return information to the Canada Revenue Agency (CRA) directly from EFILE-certified tax preparation software.

Taxpayers may take their tax slips and supporting documents to a registered tax preparer and for a fee, the tax preparer will prepare their return and send it to us electronically using EFILE.

[Apply for EFILE](#) 

Any firm, organization, or individual who provides tax preparation services can apply, as long as they meet the definition and requirements of an applicant and pass the suitability screening criteria.

Your online EFILE account

Use your EFILE number and password to:

- Maintain your account
- Renew your account
- View transmission history

[EFILE Sign in](#)

Guides and help

- [EFILE Helpdesk support](#)
- [EFILE transmission service hours of operation](#)
- [Electronic Filers Manual RC4018](#)
- [T3 Electronic Filers Manual RC4657](#)

Related services and information

- [What's new and program updates](#)
- [Discounter information](#)
- [Mandatory electronic filing](#)
- [Make a payment to the Canada Revenue Agency](#)

2. Click “EFILE Registration Online Form”

Apply for EFILE

- [1. Overview](#)
- [2. Eligibility](#)
- 3. Apply for EFILE**
- [4. Certified software](#)
- [5. File returns](#)
- [6. T3 EFILE Information](#)

- [How can I apply?](#)
- [Issuance of EFILE number and password](#)
- [When should I apply?](#)
- [Why does it take 30 business days?](#)

T2 Corporation Internet Filing

Do not register for EFILE if you are filing your own T2 Corporation income tax return. Visit the [Corporation Internet Filing](#) web page for more information.

T3 Trust Internet Filing vs T3 EFILE

For a list of T3 Trust returns that can use internet filing, visit the [Trust Internet Filing](#) web page for more information along with [Restrictions for online filing](#). For T3 electronic trust returns such as T3RET, T3ATH-IND, T3M, T3S or T3RCA to be filed using EFILE, visit [How to file a T3 return](#) along with [T3 EFILE exclusions](#) and the [T3 EFILE certified software web page](#). If you need a trust account number, visit our [Trust Account Registration](#) online service. The T3 EFILE service is now open!

To participate in the Community Volunteer Income Tax Program (CVITP)

You must **first** register as a volunteer with the CVITP at canada.ca/taxes-volunteer. If you intend on transmitting returns by EFILE under the CVITP, you must also **apply** for an EFILE number.

How can I apply?

Your first step in becoming an electronic filer is to complete the [EFILE Registration Online form](#). This is a one-time application, but in some situations you will have to submit revised information. Successful applicants will also be required to [renew](#) their application on a yearly basis.

The online application is designed primarily for those operating a tax preparation business. However, individuals may also apply to become

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[EFILE Sign in](#)

Guides and help

- [EFILE Helpdesk support](#)
- [EFILE transmission service hours of operation](#)
- [Electronic Filers Manual RC4018](#)
- [T3 Electronic Filers Manual RC4657](#)

Related services and information

- [News and program updates](#)
- [Discounter information](#)
- [Mandatory electronic filing](#)
- [Make a payment to the Canada Revenue Agency](#)
- [Legal obligations](#)



3. For **“Business Type”**, select **“Volunteer (CVITP/Income tax Assistance Program Only)”** and fill out the required fields.


For the question, **“Transmitting electronic authorization or cancellation requests. Select “yes” if you will be using the “Authorizing or Cancelling a Representative” web service.”**, select **“Yes”** if you intend to use the Auto-fill my return (AFR) service. If **“No”**. Then click **“Next”**.

EFILE registration – identify business and return types

Identification information

*** Business type (required)**

- Proprietorship
- Corporation
- Partnership
- Branch Office
- Volunteer (CVITP/Income Tax Assistance Program only)
- Charitable Organization
- Public Trustee
- Trust

 Notice

- You must register as a volunteer **before** registering for EFILE. Please go to the [Volunteer registration web page](#)
- You only need an EFILE number if you will be transmitting returns by EFILE under the CVITP.
- If you registered in EFILE last year, **do not** apply again. Please go to the Account Renewal page and [Sign in](#) with your EFILE Number and password.
- If you forgot your password contact your designated [EFILE Helpdesk](#)
- Please do not apply for a new EFILE registration each year.

*** Name (as provided on your volunteer registration) (required)**

*** Contact name - enter same name as above (required)**

*** Phone (required)**

(416)	999	-	9999
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Extension

*** E-mail address (as provided on your volunteer registration) (required)**

*** Language to communicate with you (required)**

- English
- French

Return types

*** Types of returns to transmit (required)**


T1 returns

*** Transmitting electronic “Authorizing or Cancelling a Representative” requests. Select “yes” if you will be using the CRA Auto-fill my return service when completing taxpayer returns. (required)**

- Yes
- No

4. For “Physical Address”, enter your CVITP Organization’s address. For “Mailing Address”, enter your personal mailing address. Then, click “Next”.

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EFILE registration – address information

Physical address

* Street number and name (required)

* City (required)

* Province (required)

* Postal code (required)

Mailing address

Check if mailing address is the same as above

* Street number and name (required)


* City (required)

* Province (required)

* Postal code (required)

5. Enter your **Name**, **SIN** and **RepID**. If you do not have a RepID, please refer to the Job-Aid on how to obtain a RepID. For **“Title”**, select **“Volunteer”**. Then, click **“Next”**.

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EFILE registration – applicant information

Refer to [suitability screening](#) for the definition of an applicant. Social Insurance Number (SIN) and the RepID are not displayed below for security reasons.

Applicant

* Name (required)

* SIN (required)


* RepID (required)

* Title (required)
Volunteer ▾

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6. Review the security measures and check off the box. Then, click **“Next.”**

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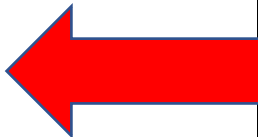
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EFILE registration – security measures

The following security measures are used by the CVITP


- Encryption of taxpayers' returns by using the tax software provided by the program.
- Electronic copies of taxpayers' returns are saved **only** on encrypted USB flash drives and are transmitted to the Canada Revenue Agency within 48 hours of completion.
- All electronic copies of the taxpayer's return are deleted no later than 48 hours after its transmission to and acceptance by the Canada Revenue Agency.

I agree to use CVITP security measures to protect confidential information collected in order to electronically file returns



EFES-0015

7. Review the information and Privacy Notice and check each box. For “Title”, enter “Volunteer”. Then click “Submit Registration”.

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EFILE registration – certification

I will comply with CRA procedures and policies outlined on the CRA's Web site and will comply with all provisions of the Income Tax Act.

I understand that false statements, omissions or non-compliance may result in immediate suspension of electronic filing.

I understand that I must maintain the confidentiality of my EFILE password.

I agree to:

- advise the CRA of any loss, suspected loss, or unauthorized disclosure of my password or of client information obtained through electronically filed returns.
- provide the CRA with a complete description of any incident involving loss or disclosure of my password or of client information as soon as I become aware of any such incident.

*** Name (required)**

*** Title (required)**

I am authorized to complete and submit this form.

I certify the information given is correct and complete.

Privacy Notice

Personal information, including your social insurance number, is collected under the authority of sections 150, 220 and 237 of the Income Tax Act and is used for registration, suitability screening, and the monitoring of electronic filers' activities, and the management of credentials used to provide authentication services for secure online program applications related to EFILE. Personal information will also be verified against sources within the CRA. Failure to provide this information may result in your EFILE account being denied or suspended. Personal information is described in personal information bank EFILE Online Services, CRA PPU 211 and is protected under the Privacy Act. Under this act, individuals have a right to protection and correction of and access to their personal information. You also have the right to file a complaint with the Privacy Commissioner of Canada regarding our handling of your information.

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8. Your CVITP EFILE renewal is complete. The fields on this page will be pre-populated with your own information. Please save the information on this page for future reference.

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Sign out

EFILE registration – confirmation and password

Date/Time: 2022/11/07 1:27:33 PM

This confirms receipt of your request to renew your participation in EFILE. Your new password is shown below. **Processing of your application may take up to 30 business days.** We will notify you when we have completed the suitability screening.

If necessary, please update your current software with your new password to avoid transmission failures.

EFILE number:

Password:

Name:

Email address:

Mailing address:

- Contact the Winnipeg EFILE Helpdesk at 1-800-461-1806, should you have any questions.
- Check out the [What's new](#) page on the CRA's EFILE website at [Canada.ca/efile](#) for important information, updates and links to resources available to you.
- Important messages are regularly communicated to inform you of any system changes, maintenance schedules, filing deadlines, suitability screening status, and significant issues from other areas within the agency.
- Check your email programs to ensure that spam filters, junk mailboxes, firewalls, etc. are not configured such that they prevent you from receiving the tax messages. This occurs when your computer identifies the incoming emails from EFILE-TED < noreply@Canada.ca > as spam and dumps them into a junk folder.
- The Form TIS60, Community Volunteer Income Tax Program Taxpayer Authorization **must** be completed and signed by the taxpayer prior to transmission of the return and given to the taxpayer for their records.
- **Print this page and keep it with your records.** Your EFILE number and password are needed to use the electronic filing services and to renew your EFILE participation online next filing season. Remember, your password is confidential and must remain protected.

This concludes the CVITP EFILE registration. For any CVITP-related enquiries, please contact your CRA CVITP Officer. For any EFILE-related enquiries, please contact the [EFILE Helpdesk](#).