

EFILE job aid

This document provides information on:

- [EFILE registration for a new volunteer](#)
- [EFILE renewal for a returning volunteer](#)
- [EFILE transmission history](#)

Information regarding EFILE, who can apply, and the certification process is available at canada.ca/efile.

EFILE registration for a new volunteer

1. Volunteers can register for EFILE only if they:
 - are 18 years of age or older
 - are a Canadian resident
 - have a valid social insurance number (SIN)
 - are discharged from bankruptcy
2. If the conditions are met, go to canada.ca/efile. Once the EFILE for electronic filers page is opened, click on [Register for EFILE](#).

i EFILE Registration and Renewal online options are not operational at this time

The Registration and Renewal options have been disabled from **October 1, 2018 to October 22, 2018** to allow system maintenance prior to conversion.

i EFILE

The EFILE service is open for transmissions from **February 26, 2018 at 8:30 a.m. (Eastern time), until January 25, 2019**, for the electronic filing of your clients' 2014, 2015, 2016, and 2017 initial personal income tax and benefit returns and 2015, 2016, and 2017 amended T1 returns.

i Did you know that electronic filers can now scan T183 forms for retention?

Electronic filers can now keep a scanned version of the original T183 form signed by the taxpayer. If an electronic filer chooses to retain scanned versions of these forms, they must adhere to the requirements of Section 230 of the Income Tax Act by ensuring a minimum level of resolution in an electronically readable format, as the scanned version is considered a "record". Electronic filers must ensure that the manner of storage does not in any way change the information contained in the signed version of the T183 form provided by the taxpayer. The electronic filer and the taxpayer must retain either a scanned or paper version of the T183 form for six years from the end of the taxation year that the form relates to.

⚠ 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.

i 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.

Register 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 Login

Guides and help

[EFILE Helpdesk support](#)

[EFILE transmission service hours of operation](#)

[Electronic Filers Manual RC4018](#)

Related services and information

[What's new and program updates](#)

[Discounter information](#)

[Mandatory electronic filing](#)

[Make a payment to the Canada Revenue Agency](#)

[Legal obligations](#)

[Root certificates and Cookies](#)

3. On the [Apply for EFILE](#) page, click on [EFILE Registration Online form](#).

- [Overview](#)
- [Eligibility](#)
- Apply for EFILE**
- [Certified software](#)
- [File returns](#)

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

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⚠ 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.

Your online EFILE account

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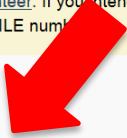
[EFILE Login](#)

Guides and help

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

Related services and information


- [News and program updates](#)
- [Discounter information](#)



4. On the [EFILE registration](#) – identify business and return types, enter information as indicated below, starting with the [Business type: Volunteer](#). If the associated organization is unknown, the Business name should be left blank.

Identification information

* **Business type (required)**

Proprietorship
 Corporation
 Partnership
 Branch Office
 Volunteer (by CRA invitation only) 
 Charitable Organization
 Public Trustee


Notice

- You must register as a volunteer **before** registering for EFILE. Please go to the [Volunteer registration web page](#) first.
- 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 [log 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 of proprietorship, partnership, or corporation (official or registered name of the organization) (required)**

Business name - if different from above

* **Contact name - responsible for electronic filing (required)**

 **Volunteers - Enter your contact information here**

* **Phone (required)**

() -

Extension

Fax
() -

* **E-mail address (required)**

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

English
 French

Return types

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

T1 returns

5. On the [EFILE registration – address information page](#), enter the business address of the organization and the mailing address of the volunteer. If the associated organization is unknown, use the mailing address of the volunteer.

Business address where you will conduct business

* Business street (required)

* Business city (required)

* Business province (required)

* Business postal code (required)

Mailing address for correspondence throughout the year

Check if the mailing address is the same as the business address

* Mailing street (required)

* Mailing city (required)

* Mailing province (required)

* Mailing postal code (required)

Enter in your information (volunteer) here

As you don't know the address of the clinic you will be volunteering at yet.

Enter in your information (volunteer) here

6. Volunteers must enter their name and SIN on the [EFILE registration – applicant information page](#).

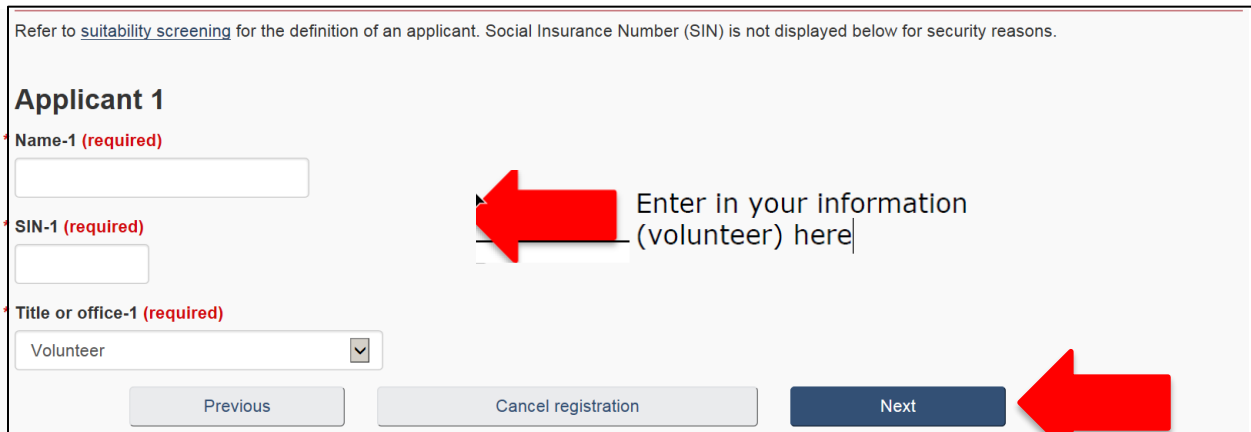
Refer to [suitability screening](#) for the definition of an applicant. Social Insurance Number (SIN) is not displayed below for security reasons.

Applicant 1

Name-1 (required)

SIN-1 (required)

Title or office-1 (required)
Volunteer



7. On the [EFILE registration – security method page](#), enter a brief description of the security measures that will be followed to protect confidential information.

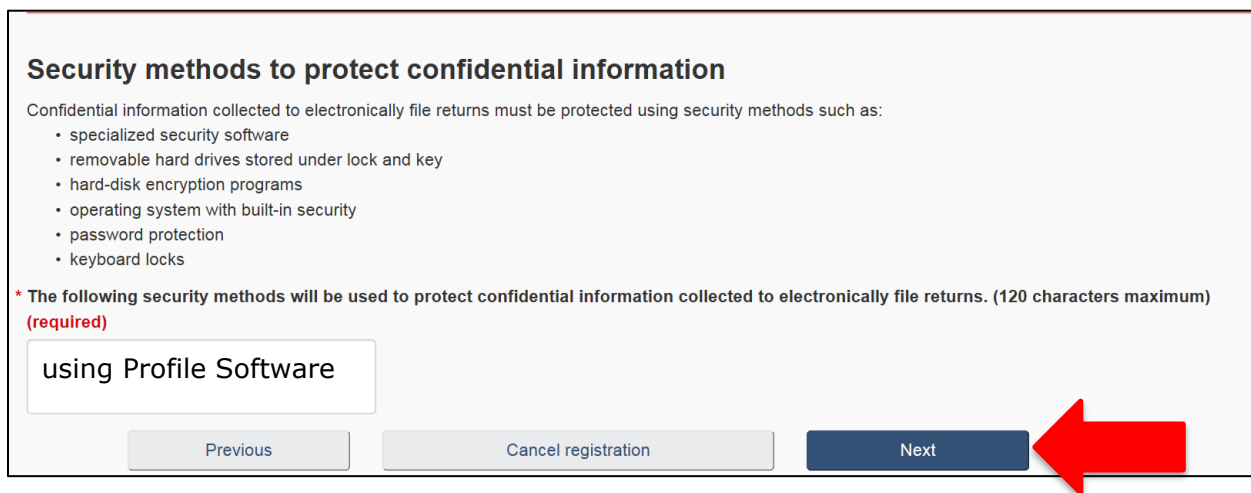
Security methods to protect confidential information

Confidential information collected to electronically file returns must be protected using security methods such as:

- specialized security software
- removable hard drives stored under lock and key
- hard-disk encryption programs
- operating system with built-in security
- password protection
- keyboard locks

* The following security methods will be used to protect confidential information collected to electronically file returns. (120 characters maximum) (required)

using Profile Software



8. On the [EFILE registration – certification page](#), check all the boxes and enter the volunteer’s name and title before submitting the registration.

This business and its employees 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:

- if the business is sold or its organizational structure is changed, a new application for electronic filing has to be filed; and;
- 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 or office (required)**


I am the business official or principal owner authorized to complete and submit this form.

I certify the information given is to the best of my knowledge correct and complete.

Privacy Notice

Personal information is collected under the authority of section 150 and 220 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 Individual Returns and Payment Processing, CRA PPU 211 and is protected under the Privacy Act. Individuals have a right of protection, access to and correction or notation of their personal information. Please be advised that you are entitled to complain to the Privacy Commissioner of Canada regarding our handling of your information.



9. Once you click on Submit registration, the last page, [EFILE registration – confirmation and password](#), will display. It contains an EFILE number and password. Print this page and keep the EFILE number and password confidential. **The password cannot be sent again** by the CRA or EFILE Helpdesk support.

Once the EFILE registration is approved, an email is sent to the volunteer and the EFILE number is activated.

Date/Time: 2018/10/19 5:47:25 PM

Your access will be restricted to account maintenance activities until suitability screening has been completed. Processing of your application may take up to 30 days. We will notify you when we have completed the suitability screening.

EFILE number: EFILE # issued
Password: Password provided

Name: VOLUNTEER'S NAME
Business Name: Organization's Name
Email address: Volunteer's address@email.com

Mailing address:
1 Volunteer's address
City, Province
Postal code

- Contact the Sudbury EFILE Helpdesk at 1-800-361-6283, 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.

[View in printer-friendly format](#) [Submit another registration request](#) [I'm finished registering](#)

EFILE renewal for a returning volunteer

1. Go to canada.ca/efile. Once the [EFILE for electronic filers](#) page is opened, click on [EFILE Login](#).

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EFILE

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Your online EFILE account

Use your EFILE number and password to:

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

[EFILE Login](#)

2. On the [EFILE – login page](#), enter your EFILE number and your most current password.

* EFILE number (required)

EFILE # issued

* Most current password (required)

Password provided

[Login](#)

3. On the [EFILE – select action page](#), click on [Renew account](#).

EFILE – select action

[Renew account](#)

[Accepted transmission\(s\)](#)

[Rejected transmission\(s\) requiring correction\(s\)](#)

[View ReFILE Service Transmission History](#)

4. Enter the information requested in the pages of the renewal according to the information in the [EFILE registration for a new volunteer](#) subject.

EFILE transmission history

After logging in (see [EFILE renewal for a returning volunteer](#)), the EFILE – select action page allows you to view the transmission history of [Accepted transmission\(s\)](#) and [Rejected transmission\(s\) requiring correction\(s\)](#).

(Note: the ReFILE service allows for the electronic transmission of amended T1 returns and is not available in the UFile software provided to volunteers. If a volunteer selects the “View ReFILE Service Transmission History” hyperlink, they will receive an error message indicating they do not have any transmissions to display.)

[Accepted transmission\(s\)](#)
[Rejected transmission\(s\) requiring correction\(s\)](#)
[View ReFILE Service Transmission History](#)
[Maintain account](#)

1. The page [EFILE – transmission history](#) will appear after clicking on [Accepted transmission\(s\)](#). Enter a date.

View transmissions up to (YYYYMMDD)

A list of all the ACCEPTED transmissions will appear. The details of a transmission can be viewed by clicking on a [File name](#).

File name	Preparer number	Date of trans.	Time of trans.	Return rejected	Tax year
XXXXXXX	ANNNN	2018-11-27	15.44.15		2017

The [Acknowledgement file information](#) for transmission: [XXXXXX](#) will appear. Note that even if [Error clues](#) exist, the tax return has been accepted and the volunteer does not need to correct the error.

DCN: ANNNANANANAN
 Givenname: First
 Surname: Last
 Error clues:
 Activity code:180

[Back](#) [Main Menu](#)

2. The page [EFILE – transmission history](#) will appear after clicking on [Rejected transmission\(s\) requiring correction\(s\)](#). Enter a date.

EFILE – transmission history

View transmissions up to (YYYYMMDD)

[Submit](#) [Select action](#)

A list of all the REJECTED transmissions will appear (note the R). The details of a rejected transmission can be viewed by clicking on a [File name](#).

Rejected transmission(s) for Efiler ANNNN

Up to: 20181231

File name	Preparer number	Date of trans.	Time of trans.	Return rejected	Tax year
XXXXXXXX	ANNNN	2018-10-05	10.18.44	R	2016
XXXXXXXX	ANNNN	2018-02-12	11.58.17	R	2017
XXXXXXXX	ANNNN	2018-02-12	16.14.28	R	2015

[Previous](#) [Main Menu](#) [Next](#)

DCN: ANNNANANANAN
 Givenname: First
 Surname: Last
 Error clues: 517
 Activity code:184

[Back](#) [Main Menu](#)

The [Error clues](#) provide information regarding why the transmission was rejected. With the help of the [Error clues](#):

- consult chapter 2 in the [RC4018 Electronic Filers Manual](#) to understand and correct the error (note that the Error Clues, Codes, and Messages all share the same number);
- once the return is corrected, go to UFile to retransmit the tax return.