



**PAUL ELLISON**  
PROFESSIONAL CORPORATION  
CHARTERED PROFESSIONAL ACCOUNTANT

## **My Business Account and Updating CRA Records**

As discussed in our zoom meetings, there are three types of accounts that individuals can setup to be able to access records through the CRA website.

CRA My Account – used by an individual to access their own personal tax information

CRA Represent a Client – Primarily used by accountants so clients can authorize them to access online information

CRA My Business Account – setup by an individual and used to access businesses and other organizations who have listed that individual as either a director or shareholder

These steps are what I have found to be best practice of how to setup your own My Business Account AND how to get the CRA to update their records with the correct directors listing of the church.

They are two separate processes that can be done at the same time.

The Social Insurance number is what the CRA will use to associate the charity with the individual trying to access it through My Business Account



### **How to update the churches directors listing with the CRA**

Filing the Charity return T3010 and the T1235 does NOT update the directors list in the CRA database. In order for an individual to be able to talk to the CRA about an organization on the phone or access the information through My Business Account they must be listed in the CRA database as a director. In most cases I have found that the directors list the CRA has on file is so old that most of the people listed aren't around anymore.

The charities directorate has instructed us that in order to update the information, they would need the following:

#### **Step 1**

A letter written on the organizations letterhead and signed by either the Chairman/President/Vice President containing the following information for the directors

Full name  
Address  
Phone Number  
Birthdate  
Social Insurance Number

The instructions should indicate that the organization requests that the CRA update the directors for the organization with the current list above. In addition, please remove any directors in the CRA system not included in this list.

Include the phone number for the person signing the document in case there are questions.

#### **Step 2**

Provide a copy of the most recent AGM or minutes that show that the directors above were elected.



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**Step 3**

Fax and Mail this information to the following addresses. Advice given by the Charities Directorate is that the information is sent to all of the following locations to ensure someone sees and processes it in a timely manner.

Fax 1-833-724-7237

Canada Revenue Agency

Attention: Business Number Services Unit

Fax 1-613-954-8037

Charities Directorate

Attention: Client Services

Mail to

PEI Taxation Centre

Business Number Services Unit

275 Pope Road, PEI C1N 6A2



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### **How to setup My Business Account**

<https://www.canada.ca/en/revenue-agency/services/e-services/e-services-businesses/business-account.html>

Click on the link above and go to CRA register. You will need to enter the following

1. Social Insurance Number
2. Postal Code
3. Date of Birth
4. Tax Information for your last personal tax return filed. The line number they request information for is different for everyone so you will need your return with you.

At this point the system lets you know a code will be mailed out to you that will be used to confirm who you are and finalize setting up the account.

5. Setup a User ID and Password
6. Setup Security Questions

Once this is done and you have received the security code you can validate your account. You can then access “businesses” or in our case “Charities” by managing your profile and adding the 9 digit numbers of organizations that you are associated with.

Assuming they have processed the church information in step 1 above, your social insurance number should be connected to that organization.

If you have any specific problems with this part of the process you can contact the CRA at 1-800-959-5525

Please also keep me up to date if you run into any significant issues or if there are problems with the process listed above.