File my Return

Q's & A's

Q1. What is the File my Return service?
A1. File my Return is a new Canada Revenue Agency (CRA) service that lets eligible Canadians, particularly those with low income or a fixed income that remains unchanged from year to year, file their income tax and benefit return by answering a few questions over the phone through an automated phone service. The service is free, secure, and easy-to-use, with no paper forms or calculations to complete.

The service uses the information the CRA has on record at the time of the call, plus the answers given by the individual on the automated call to complete and file their return, and allow all the deductions, benefits and credits they are eligible for.

Individuals who are likely eligible will receive, in mid-February 2018, an invitation letter in the mail with all the steps they need to file their return using the service. In some cases, eligible Canadians living in British Columbia, Manitoba, New Brunswick, Ontario, and Yukon may have to give some dollar amounts related to provincial or territorial credits so that the CRA can properly calculate refund amounts.

Q2. Who is eligible for the service?
A2. Individuals with low or fixed incomes that remain unchanged from year-to-year may be eligible for File my Return. Eligible individuals must have received an invitation letter from the CRA to be use this service. They will get their invitation letter in mid-February 2018.

Since the CRA uses information already in its records, individuals must have filed their taxes in a previous year to be eligible.

Q3. How does someone know if they're eligible for File my Return?
A3. If eligible for File my Return, they will receive a personalized invitation letter with all the steps and information needed to file an income tax and benefit return using the service.

The invitation letter will include some personal information, such as the recipient's address, marital status, and province or territory of residence. Depending on their province or territory of residence, they may also receive an information sheet that details other information they may need to give on the call to claim provincial and territorial benefits and credits.

Canadians can also call the Individual tax enquiries line at 1-800-959-8281 to find out if they are eligible for File my Return and will be receiving an invitation letter.

Q4. How long does the service run for?
A4. The File my Return service is available starting February 26, 2018, and for the whole tax-filing season. The service will run 21 hours a day, from 6 am to 3 am, Eastern Time, 7 days a week, until April 30, 2018.

It’s important to file taxes by April 30, 2018 to avoid possible interest and penalty charges. Even if there is no income to report for this tax year, filing late could interrupt or stop benefit and credit payments.

Q5. Does the File my Return service have all the tax information needed to prepare the income tax and benefit return?
A5. The service uses the information the CRA has on record at the time of the call, plus the answers given by the individual on the automated call to complete and file their return and allow all the deductions, benefits and credits they are eligible for.

It is the caller’s responsibility to ensure the information provided is true and accurate.

Q6. Can an eligible individual still use another method to file their return if they received an invitation letter?
A6. Yes. The File my Return service is not mandatory. Eligible individuals can still file their income tax and benefit return using their preferred filing method (EFILE/NETFILE/Paper).

To save time and money, there are CRA-certified tax preparation software packages and web applications, some of which are free.

In addition, individuals may be able to get help at a free tax preparation clinic. Community organizations across Canada host tax preparation clinics where volunteers complete tax returns for eligible individuals. These clinics are offered through the Community Volunteer Income Tax Program. To find out more about local clinics, visit canada.ca/taxes-volunteer.

Q7. Can someone use the File my Return service if they did not receive a personalized invitation letter?
A7. No. The service will only be available to eligible Canadians who were sent an invitation letter. The service will verify and confirm the caller’s eligibility at the beginning of the call. If the caller is not eligible, the automated call will not let them go further in the process.

Individuals who are not eligible to use the service can still use other filing options. To save time and money, there are CRA-certified tax preparation software packages and web applications, some of which are free.

In addition, individuals may be able to get help at a free tax preparation clinic. Community organizations across Canada host tax preparation clinics where volunteers complete tax returns for eligible individuals. These clinics are offered through the Community Volunteer Income Tax Program. To find out more about local clinics, visit canada.ca/taxes-volunteer.

Q8. Can ineligible individuals become eligible to use File my Return next year?
A8. Yes. Individuals cannot apply to use the service, however, if they become eligible in future years, they will be invited. The service is tailored for individuals with low income or a fixed income that remains unchanged from year-to-year, specifically those receiving only government sourced income. If you meet this criteria, you may become eligible.

Q9. Can the File my Return service be used to file a tax return for a previous year?
A9. No. The service can only be used to complete and file the current tax year income tax and benefit return.

Q10. Is there a chance of busy signals or dropped calls while using the File my Return service?
A10. The File my Return service is a dedicated automated phone line, and thus we do not expect busy signals or calls to be dropped.

Q11. Is File my Return secure?
A11. Yes, File my Return is completely secure. The service does not disclose any personal information and only uses the information already in CRA's records to complete and file the income tax and benefit return.

When eligible users call, they will mostly answer yes or no questions. In some cases, eligible individuals living in British Columbia, Manitoba, New Brunswick, Ontario, or Yukon may have to provide some dollar amounts related to their provincial or territorial credits so that the CRA can properly calculate refund amounts.

The CRA is committed to providing a secure telephone line that is easy-to-use for eligible Canadians to file their income tax and benefit returns with no paper forms to complete. When our services involve confidential data, extra safeguards are in place. The CRA takes steps to ensure that private and personal information is protected. The CRA will not be calling eligible Canadians for this service, and will never ask for a credit card number or driver's license number.

Q12. Can someone other than the eligible taxpayer file a return for them using File my Return?
A12. No. In order to use the File my Return service, you must enter your confidential Social Insurance Number (SIN) and date of birth. The CRA performs several identification validations, including validating the social insurance number and date of birth with the CRA database. If the File my Return service finds an identification error or a discrepancy, the system will not process the return. This is to ensure that private and personal information is protected.

Q13. Will the File my Return service tell the caller if they are getting a refund or balance owing?
A13. For security reasons, the service will not provide any personal information during the call, which includes any refund or balance owing amounts (if applicable). After filing the income tax and benefit return, the File my Return service will provide a confirmation number to the caller, and they will receive their Notice of Assessment shortly thereafter. The Notice of Assessment will clearly show all refund or balance owing amounts.

Q14. Can an individual still use the service if the personal information on their invitation letter is outdated or incorrect?
A14. If any of the personal information in the letter, such as address or marital status, is outdated or incorrect, then they are not eligible to use File my Return this year.

It is always important to update the information the CRA has in its records as soon as possible.

Ineligible individuals are welcome to file their income tax and benefit return using other methods, such as online with certified tax-filing software, on paper, or by a free tax preparation clinic offered through the Community Volunteer Income Tax Program. To find out more about local clinics, visit canada.ca/taxes-volunteer.

Q15. An individual received an invitation letter based on their income situation, but their spouse did not. If they have the same income situation, can they still use File my Return?
A15. No, The File my Return service will only accept returns from eligible individuals who were sent an invitation letter.

Individuals who are not eligible to use the service can still use other filing options. To save time and money, there are CRA-certified tax preparation software packages and web applications, some of which are free.

Q16. What steps will eligible individuals need to do to use File my Return?
A16. Eligible Canadians will have received an invitation letter in mid-February. The letter explains the process to use File my Return, and lets filers know what specific information they will be asked to provide on the call.

Eligible Canadians that received an invitation letter can call the automated File my Return phone number and follow a three-step process:

1. Provide their date of birth and Social Insurance Number to confirm their identity.
2. Confirm that the identification information in CRA's records is correct, and answer a series of yes or no questions to confirm that their income continues to come from the same sources as the previous tax year.
3. Answer additional questions to claim refundable provincial and territorial benefits and credits. (Applicable for residents of British Columbia, Manitoba, New Brunswick, Nova Scotia, Ontario, Prince Edward Island, and Yukon)

The File my Return service uses information in the CRA's records, and the answers provided by the caller during the automated call to complete and file their income tax and benefit return. Callers will receive a confirmation number at the end of the call that they can use if they have enquiries regarding the status of their return.

Q17. What should the caller do if they make a mistake on one of the questions?
A17. If the caller makes a mistake on one of the questions during the call, they can hang up at any time. If they do that, all information provided during the call will not be saved and the return will not be completed and filed. The caller can call the File my Return service again at a later time to redo the filing process.

If the caller already filed their income tax and benefit return and received a confirmation number, they will have to request an adjustment. To request an adjustment, the individual can fill and submit a T1 Adjustment request form (T1-ADJ), or use the Change my Return feature in My Account.

Q18. What non-refundable tax credits will the File my Return service automatically apply?
A18. The File my Return service will automatically apply the following federal and provincial non-refundable tax credits where applicable:

- Basic Personal Amount (applies to everyone)
- Age Amount (applies if 65 or older on December 31 of the tax year of the return)
- Disability Amount (applies if caller has a disability that is coded Permanent or has a disability that is coded temporary but that has an end date greater than or equal to the tax year (i.e., 2017 or later))

The File my Return service will not apply or ask about other non-refundable tax credits because, based on eligible callers' current situations, other non-refundable tax credits would not affect the amount of refund, benefits and/or credits they would receive.

Q19. What is the net income amount?
A19. Married or common-law partners will need to know each other's net income amount to file their respective income tax and benefit returns. This amount is used to calculate their entitlement to various credits such as the GST/HST credit.

Eligible married or common-law individuals living in BC, Manitoba, Northwest Territories and Nunavut will be asked for their spouse's net income amount during the automated phone call.

The net income amount can be determined by taking the total income from all sources minus applicable deductions; it can be found at Line 236 of the income tax and benefit return.

For those eligible for File my Return, net income can be determined by adding the amounts in the boxes specified below that are on the tax information slips you may have received:

- T4A(OAS): boxes 18 and 21;
- T4A(P): box 20 (minus box 18 if an amount is present);
- T4E: box 14; and,
- T5007: boxes 10 and 11.

If there is no income, the net income amount will be zero.