



# How to log into a MyCRA business account

## My Business Account and Updating CRA Records

There are three types of accounts that individuals can set up 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** – set up by an individual and used to access businesses and other organizations (including congregations) who have listed that individual as either a director or shareholder

The following are the steps to set up your own **My Business Account** *AND* to update the CRA with the correct directors listing for your church.

- Please note there 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 your congregation's 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 information through **My Business Account**, they must be listed in the CRA database as a director.

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

## STEP 1

- A letter written on the organization's 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 the CRA update the directors for the organization with the current list provided and remove any directors in the CRA system not included on the list provided.
- Include the phone number for the person signing the document in case there are questions.

## STEP 2

- Provide a copy of the most recent Annual General Meeting (AGM) or minutes that show that the directors provided were elected.

## 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.

1. **Fax: 1-833-724-7237**  
Canada Revenue Agency  
*Attention: Business Number Services Unit*

2. **Fax: 1-613-954-8037**  
Charities Directorate  
*Attention: Client Services*

3. **Mail to:**  
PEI Taxation Centre  
Business Number Services Unit  
275 Pope Road, PEI C1N 6A2

## How to set up a My Business Account

---

Click on the link below and go to CRA register.

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

You will need to enter the following:

- Social Insurance Number
- Postal Code
- Date of Birth
- 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 will advise that a **code will be mailed out** to you which will be used to **confirm who you are** and **finalize setting up the following in your account:**

- User ID and Password
- Security Questions

Once you have received the security code, you can validate your account.

From there you can then access "Businesses" or "Charities" (what is used for congregations) by managing your profile and adding the 9-digit numbers of organizations that you are associated with.

Once the information has been processed for step 1 (page 2), your social insurance number should be connected to your organization.

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

If you have any feedback on your experience in setting up your account or have further issues once you have followed up with the CRA, please contact [info@elcic.ca](mailto:info@elcic.ca) (please note: *CRA Charities Account* in the subject line of your email).