GUIDE TO CRA MAIL AND ONLINE ACCOUNTS

Dear Client:

We would like to inform you of an important update from the Canada Revenue Agency (CRA) that may impact how your business receives tax-related correspondence.

Beginning May 2025 for new registrations and June 2025 for existing businesses, CRA has implemented a **digital-first communication model**. This change means that most official notices – including GST/HST statements, corporate tax assessments, and other key documents – will now be delivered exclusively through the **CRA My Business Account** portal.

Key Highlights:

- **Online Mail Is Now the Default:** Paper mail will no longer be issued unless specifically requested.
- **Regular Monitoring Required:** Businesses are responsible for checking their CRA account frequently to avoid missing important deadlines or incurring penalties.

Yale does not receive a copy of your mail and we do not receive notifications that you have new mail. We can only see your mail if you inform us and we specifically log in to your business number if we are already authorized as representatives. **It is very important that you regularly check your own CRA account and inform us if there is any action that needs to be taken.**

Recommended Actions:

1. Ensure your business is registered for My Business Account.
2. Sign in regularly to monitor for new mail and stay informed about your tax obligations.
3. Keep your contact information up to date within your CRA profile.

Below you will find step-by-step instructions for how to register for a CRA account and update your preferences.

If you require assistance with account setup, authorization, or updating your preferences, our team is available to support you.

Yours truly,

Yale PGC LLP

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20 Holly Street, Suite 400, Toronto, Ontario M4S 3E8 & 45 Vogell Road, Suite 510, Richmond Hill, Ontario L4B 3P6
Tel: (416) 485-6000 Fax: (416) 485-1105 www.yalepgc.ca Tel: (905) 764-0404 Fax: (905) 764-0320

How to register for a CRA account

If you already have a **CRA My Account** (for your personal taxes) or **CRA My Business Account** (for your business taxes), then you already have a CRA account. It is only one sign-in credential for both services.

Please use your sign-in credentials to log in to your CRA account.

Otherwise please use the following steps to register for a CRA account:

1. Go to **CRA's website** to **register** for a CRA account

2. **Choose your sign-in method**
   You have two main options:
   a) **CRA user ID and password** (you create a new username and password)
   b) **Sign-In Partner** (use your online banking credentials from a participating financial institution)

3. **Verify your identity**
   CRA will ask for your personal SIN, birthday, postal code, and a figure from your most recent personal tax return to confirm your identity. You then have 2 options to verify your identity:
   a) **Submit a photo of yourself and your ID document**. This will give you immediate access. Accepted ID documents are your Canadian passport, Canadian driver's license, or your provincial photo ID card.
   b) **Wait for your CRA security code**. CRA will send you a security code by mail within 10 business days to the address they have on file. Once you receive the letter, follow the steps shown in the letter to complete verifying your identity.

4. **Enroll in multi-factor authentication**
   You will be required to enter a one-time passcode in addition to your password to sign in. You have two main options:
   a) **By phone** (receive a text or phone call with the security code)
   b) **With an authenticator app**

How to add your business(es) to your CRA account

You now have a CRA account. If you have a business or corporation, please use the following steps to link your business(es):

1. Go to **CRA's website** to **sign in** to your CRA account

2. **Add your business account**
   a) Select the **+ Add account** option
   b) Select the **Business account** option
   c) Select the **Add business number** option
   d) Enter your **9 digit business number.** This number can be found in a corporate tax return, HST return, or notice of assessment. Only include the first 9 digits, do not include the RC0001 or RT0001 at the end.
   e) If you receive an **error message** that you cannot add the business number, this is a common error as your name may not match the name CRA has on file for the business. Please **call CRA** at the number shown in the error message and a CRA agent should be able to help you fix it. There is nothing Yale can do to fix this.
   f) If you have **multiple business numbers** to add, repeat these steps

How to change mail and correspondence preferences

CRA has defaulted most businesses to online mail. You will receive an email notification that you have new mail from CRA, and then you need to sign in to your CRA account to view the mail.

Businesses are responsible for checking their CRA account frequently to avoid missing important deadlines or incurring penalties. Many CRA communications are time sensitive.

If you prefer to receive paper mail through Canada Post or to update your correspondence preferences, please see the following steps:

1. Go to **CRA's website** to **sign in** to your CRA account

2. Select your business

3. Select **Profile** in the left-side navigation menu

4. Select **Manage notification preferences**
   Here you can **register or update your email address**, and update optional notifications to receive. You can register up to 3 email addresses per program account.

5. Back in **Profile**, select **Manage mail for my business**
   Decide whether you want correspondence delivered:
   a) **Online / electronically**: Notices, letters, etc. will show up in your CRA My Business Account. You will receive email notifications when new documents are available.
   b) **Paper**: If you prefer postal mail, you can request paper mail for most correspondence. This is **only valid for 2 years** and you will need to re-apply to continue to receive paper mail once it expires. You must **keep your address updated** with CRA, and any returned mail may result in CRA changing your delivery method to online.

6. Back in **Profile**, select **Manage addresses** to ensure your address is up to date

7. If you have **multiple businesses**, repeat the above steps for each business. You can change the business by selecting a different business number in the drop-down menu in the top-left corner on the **Overview** page.

Alternative to using the above steps, to apply for **paper mail** you can fill out **Form RC681 – Request to Activate Paper Mail for my Business** and **mail it to your closest** **CRA Tax Centre**. Clients in Ontario should mail the form to:

Sudbury Tax Centre
PO Box 20000, Station A
Sudbury, ON   P3A 5C1

How to authorize Yale as your representative - businesses

To authorize Yale as representative for your business, please see the following steps:

1. Go to [CRA's website] to **sign in** to your CRA account

2. Select your business

3. Select **Profile** in the left-side navigation menu

4. In the **Authorized representatives** section, select **Confirm pending authorizations**
   If you do not see any pending representatives to confirm, then please skip to step 5

5. In the **Authorized representatives** section, select **+ Add**
   a) **Enter Yale PGC LLP's representative information**: Our business number (BN) is 119797025
   b) **Scope of authorization**: All accounts
   c) **Authorization level**: Level 2
   d) **Expiry date**: Does not expire

6. If you have **multiple businesses**, repeat the above steps for each business. You can change the business by selecting a different business number in the drop-down menu in the top-left corner on the **Overview** page.

How to authorize Yale as your representative - individuals

To authorize Yale as representative for your SIN, please see the following steps:

1. Go to [CRA's website] to **sign in** to your CRA account

2. Select your personal name

3. Select **Profile** in the left-side navigation menu

4. In the **Authorized representatives** section, select **Confirm pending authorizations**
   If you do not see any pending representatives to confirm, then please skip to step 5

5. In the **Authorized representatives** section, select **+ Add**
   e) **Enter Yale PGC LLP's representative information**: Our business number (BN) is 119797025
   f) **Scope of authorization**: All accounts
   g) **Authorization level**: Level 2
   h) **Expiry date**: Does not expire