



CRA Health Check

How CRA-ready are your books—before year-end makes it urgent?

Free private self-check for Canadian SMBs — clarity, not judgment

Prefer interactive? Take it online → balance-books.ca/scorecard

How to rate each area

Rate honestly. No wrong answers—only a clearer picture.

0 = No / Rarely

1 = Sometimes / Partially

2 = Yes / Consistently

1. Bank & Credit Card Reconciliations

Every business bank account and credit card is fully reconciled to the statement each month—so balances match and nothing sits unreconciled for weeks.

___ / 2

2. Transaction Coding Quality

Transactions are categorized accurately and consistently (clear chart of accounts, minimal "Ask My Accountant" or catch-all miscellaneous buckets).

___ / 2

3. GST/HST Readiness

Input tax credits are tracked properly, your filing frequency is correct, and you could file without a last-minute scramble.

___ / 2

4. Monthly Reporting Cadence

You receive (or can produce) a clean Profit & Loss and Balance Sheet within the first 10–12 days of the following month—early enough to use them.

___ / 2

5. Document & Receipt Organization

Supporting documents are captured digitally and linked or easy to find—not scattered across email, shoeboxes, or random drives.

___ / 2

6. Year-End / CPA Readiness

Your books are in a state where a CPA can start year-end work without major cleanup or reconstruction.

___ / 2

Your CRA Health Check: _____ / 12

Write your result — bring it to a free discovery call at balance-books.ca/contact



What Your Score Means

0 – 4: Needs attention

Books are likely adding stress and surprise cost—especially around GST/HST and year-end. A focused catch-up usually comes before a smooth monthly rhythm. Fixable with a clear plan.

5 – 8: Partly ready

Some pieces work, but gaps remain (often reconciliations, HST tracking, or timely reports). Many owners say "fine... until it isn't." Closing a few weak spots now prevents the scramble later.

9 – 12: CRA-ready foundation

You are in good shape. The usual next step is protecting the system—tight reconciliations and reports early enough to drive decisions, not just tax season.

What “CRA-ready” usually looks like

- ☐ All accounts reconciled every month
- ☐ Clean coding with almost no suspense items
- ☐ GST/HST ready to file without drama
- ☐ Reliable P&L + Balance Sheet by the 10th
- ☐ Accountant-friendly books year-round

Want a clearer path from here?

Book a free 20-minute discovery call. We'll review your situation (and your CRA Health Check if you'd like), map a calm path to steady books, and give you a written scope before any commitment.

[Book your free discovery call →](#)

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