Authorizing a representative

Follow the steps below to give your representative access to your tax information.

How to authorize your representative using My Account

This method will provide your representative with immediate access to your tax account. If you are not registered for a CRA account, which includes access to My Account, go to canada.ca/cra-registration

Option 1 Add a representative using My Account

- Contact your representative to get their registered RepID, GroupID, or Business Number (BN).
- Sign in to your CRA account
- On the **Welcome** page, select your **Individual** account to access My Account
- Select **Profile** from the left-side menu

Add authorization request

- Select +**Add** in the **Authorized representative(s)** section
- Read the **Before you begin** information and select **Start**

Step 1 Enter representative information

- Enter your representative's **RepID, GroupID**, or BN, **select Search to confirm the details,** then select **Next**

Step 2 Select authorization details

- Select the applicable **Authorization level** option (Level 1 or Level 2)
- Select **Yes** to give **Online access** or select **No** to give only offline access to your accounts
- Enter an **Expiry date** if desired, or select the box **Does not expire**, then click **Next**

Step 3 Review and confirm

- Review the information provided
- Select the **I confirm that the CRA may deal directly with the above named representative**… box, then select **Submit**.
- You will receive confirmation that the representative has been successfully authorized on your account.

Option 2 Add a representative by confirming them in My Account

To use this service, your representative **must first** submit an authorization request through Represent a Client to request access to your information. Once submitted, you must:

- Sign in to your CRA account
- On the Welcome page, select your Individual account to access My Account
- Select Profile from the left-side menu

Step 1 Pending representatives

- Select **Confirm pending authorizations** in the **Authorized representative(s)** section
- Under **Pending authorization requests**, select the representative's name to continue
  - If there are no pending authorization requests, a message will display that **As of (the current date) you have no pending representatives**. Check with your representative to make sure they've submitted the access request

Step 2 Review representative information

- Review the authorization request information
  - To confirm the request, select **Confirm authorization**. In the Confirm authorization window, select the **I confirm that this pending authorization will be approved**, then select **Submit**.
  - To deny the request, select **Deny authorization**. In the Deny authorization window, select either **Deny** or **Deny and restrict**, then select the **I confirm that this pending authorization will be rejected**, then select **Submit**.

You will receive confirmation that the representative has been successfully authorized or not.

How to authorize a representative using the alternative process for individuals

Your representative may use the [Alternative process for individuals] if you provide them with your previously assessed tax information.

Step 1 Provide your representative with your tax information

- Provide your representative with information from your notice(s) of assessment
  - The required tax line and year will be displayed to your representative while they are submitting their authorization request in [Represent a Client]

If you have more than one assessment or reassessment for a particular tax year, ensure to have them all available for your representative.

Step 2 Review and confirm authorization request

- Review the authorization request information, then sign the signature page provided to you by your representative for them to upload in Represent a Client for the pending request.
- The CRA may contact you to verify the authorization request.