ESG
CHARTERED PROFESSIONAL ACCOUNTANTS LLP

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HOW TO REGISTER FOR CRA MY ACCOUNT

Setting up your business and individual Canada Revenue Agency (CRA) accounts is not only important, it makes your tax life a lot easier. If you run a business, you'll need both business and personal CRA accounts.

My Account for individuals are your portals to the CRA. They centralize your communication with the government: it's where you can access your notice of assessments and view the payments you made. When you work with ESG, you authorize us as your representative with the CRA. This grants us access to your CRA account, so we can handle this stuff on your behalf.

We've laid out the steps for setting up your account, what information you'll need and what options to choose.

CRA My Account for individuals

Everyone should have one of these. From your account, you can:

- View your notice of assessment
- Track your refund
- See account transactions and balances
- See your instalment schedule
- Check your benefit payments
- View your RRSP limit
- Set up direct deposit
- Receive email notifications from the CRA

Get the full list of everything you can do from your individual CRA account.

How to set up a CRA My Account for individuals

Setting up a personal account is similar to setting up your business account. Please remember that they are two separate accounts; make sure you register for both.

Step 1 - Go to the [CRA My Account for Individuals website.]

Scroll down to **Option 2 – Using a CRA user ID and password** and click **CRA register**.

Step 2 - Start the registration application.

Grab your Social Insurance Number (SIN) and copies of your current and previous year's personal tax returns. They will ask for information from these returns (e.g. entering the amount on Line 15000). The line number amount requested will vary. It may be from the current tax year or the previous one.

Step 3 - Have your CRA security code mailed to you.

You'll typically receive your CRA security code by mail within 10 business days. Make sure they have your current address on file.

Step 4 - Sign into your CRA My Account for individuals for the first time.

To access your account, go to CRA My Account, scroll to **Option 2 – Using a CRA user ID and password**, then click on **CRA login**. Enter your CRA user ID and password. When prompted, enter your CRA security code.

We do not recommend using **Option 1 - Using one of our Sign-In Partners**. Again, there are often glitches with this process (while using your security code is a sure thing).

How to authorize ESG as your representative

Step 1 – Sign into your CRA My Account for individuals.

Step 2 – Go to your Profile.

On the left hand side of the window it will say "Navigation", "Overview", and then "Profile". Click on "Profile".

Step 3 – Authorized representative(s)

In the new window you will need to scroll down a little and it will say “Authorized Representatives”, click the “Add” button just to the right of this.

Step 4 – Authorize a representative.

On this screen you will see a description of what an authorized representative can do, a “Start” button, and”1- Enter representative information”, “2 Enter representative authorization” and “3- Review and submit”.

Click the “start” button and then section 1 will expand.

Under section 1 it will say “RepID, GroupID or BN”, enter GKW4YB (Group ID) into the box, and click the search button next to the box. The screen will now say “The following representative has been identified:” and show the firm name, phone and fax number.

Click “Next”.

Under section 2, for “Authorization level” choose “Level 2 – Allow the CRA to disclose information to your representative and make changes to your account”.

For “Online access” choose “Yes”.

Leave the “Expiry date” field empty and click “Next”.

Under section 3 it will summarize all the information, click the box that says “I confirm that the CRA may deal directly with the above names representative for the specified level of authorization. I acknowledge that these activities may occur without the CRA advising me.”, click “Submit”