

# Authorized Representatives Management

Man The Tax Man

# Authorized Representative

An authorized representative can;

1. Access your personal tax information, tax assessment or reassessment
2. Access and update your various tax accounts
3. Submit documents on your behalf

# Authorized Representative

4. Adjust a tax return(s)
5. View mail form the Canada Revenue agency on your account
6. Get your information and tax slips
7. Many other actions

# Authorized Representative

- Usually your tax preparer will ask you to give authorization when you first work with them.
- You are the only one who can grant/revoke authorization.
- The CRA Will send you a mail to notify you of authorization granted.
- The authorization usually stays in effect, until you cancel it.

# Manage authorized representatives

In order to manage your authorized representatives;

1. Login to you MyAccount service
2. Click on “Personal Profile” under your name



Government  
of Canada

Gouvernement  
du Canada

## Canada Revenue Agency

Sign out

My Account



XXXXXX XXXXX

[Personal profile](#)

Mail 1

[Submit documents](#)

## Overview

As of July 7, 2021



### Looking to apply for COVID-19 Support benefits?

To learn more about COVID-19 support benefits and to apply, visit our new [COVID-19 Support](#) page.

## Tax returns

Your return was assessed and a **of** was deposited directly into your bank account on

- View your [2020 Notice of Assessment](#)

# Manage authorized representatives

In order to check who is authorized on your account

1. Access your MyAccount
2. Click on “Personal Profile” under your name
3. Scroll down on the Personal profile page to “Authorized Representative (s)” on the bottom right hand side.

## Direct deposit

 [Banking Information Privacy Notice](#)

### Income tax refund, CWB and GST/HST credit payment

Institution: **your direct deposit**  
Branch: **information for refunds, CSB**  
Account: **and GST/HST payments**  
Last updated:

### Canada Child Benefit (CCB) payment

Institution: **Your direct deposit**  
Branch: **informaiton for child tax**  
Account: **benefit**  
Last updated:

## Email address

Email notifications will be sent to:

**email@address.xxx** when eligible  
correspondence is available to view in My Account  
and important changes are made on your account.

Manage

## Authorized representative(s)

**name of authorized representative**

Authorization does not expire

[Manage authorized representatives](#) ➔

## CRA security options



# Manage authorized representatives

In order to check who is authorized on your account

1. Access your MyAccount
2. Click on “Personal Profile” under your name
3. Scroll down on the Personal profile page to “Authorized Representative (s)” on the bottom right hand side.
4. Click on “**Manage authorized representatives**”, this will display a list of all current authorized representatives.



Government  
of Canada

Gouvernement  
du Canada

# Canada Revenue Agency

Sign out

[Personal profile](#)

## Authorized representative(s) list

[Help with this page](#)

You may select the representative link to view, modify, or delete the authorization.

### Representatives currently authorized to act on your behalf

Representative's name	Authorization expires	Online access	Transactions
<a href="#">authorized representative(s)</a>	Does not expire	Yes	<a href="#">View online transactions</a>

Print

Authorize new representative

Delete all Representatives

### [Deleted/expired representative\(s\) list](#)

Screen ID: AUT.06

Version: 2021-05-26

# Manage authorized representatives

6. From this page you can Delete / authorize new representatives
7. Delete all representative; click on “Delete all representatives” and follow the prompts



Government  
of Canada

Gouvernement  
du Canada

# Canada Revenue Agency

Sign out

[Personal profile](#)

[Help with this page](#)

## Authorized representative(s) list

You may select the representative link to view, modify, or delete the authorization.

### Representatives currently authorized to act on your behalf

Representative's name	Authorization expires	Online access	Transactions
<a href="#">authorized representative(s)</a>	Does not expire	Yes	<a href="#">View online transactions</a>

Print

Authorize new representative

Delete all Representatives

### [Deleted/expired representative\(s\) list](#)

Screen ID: AUT.06

Version: 2021-05-26

# Manage authorized representatives

6. From this page you can Delete / authorize new representatives
7. Delete all representative; click on “Delete all representatives” and follow the prompts
8. Delete a specific representative; click on the “representative name” from the list, this will display the representative details
9. Click on “Delete” and follow the prompts



Government  
of Canada

Gouvernement  
du Canada

## Canada Revenue Agency

Sign out

[Personal profile](#)

# Representative - view details

[Help with this page](#)

Representative's name:	representative name
RepID:	representative ID
Telephone number:	representative contact
Fax number:	information

Authorization level:	2
Online access:	Yes
Tax years:	All
Expiry date:	Does not expire

### Authorization level:

- Level 1** - Allow the CRA to disclose information to your representative about your account.
- Level 2** - Allow the CRA to disclose information to your representative and allow your representative to make changes to your account.

Modify

Cancel

Delete

# Add an authorized representatives

In order to add a new authorized representative

1. Access your MyAccount
2. Click on “**Personal Profile**” under your name
3. On the Personal profile page scroll down to “**Authorized Representative (s)**” on the bottom right hand side.
4. Click on “**Manage authorized representatives**”, this will display a list of all current authorized representatives.

# Add an authorized representatives

5. Click on “**authorize a new representative**” and provide the representative ID <sup>(1)</sup> number and follow the prompts

<sup>(1)</sup> The Representative ID or RepID - is a unique **seven-character alphanumeric code** assigned by the Canada Revenue Agency to the tax preparers / advisors.





## Authorized representative(s) list

You may select the representative link to view, modify, or delete the authorization.

### Representatives currently authorized to act on your behalf

Representative's name	Authorization expires	Online access	Transactions
authorized representative(s)	Does not expire	Yes	<a href="#">View online transactions</a>

[Print](#)[Authorize new representative](#)[Delete all Representatives](#)

### [Deleted/expired representative\(s\) list](#)



Government  
of Canada

Gouvernement  
du Canada

Canada Revenue Agency

Sign out

[Personal profile](#)

## Authorize my representative - enter information

[Help with this page](#)

To authorize a representative to deal with the CRA on your behalf enter:

- the representative identifier (RepID);
- the group identifier (GroupID); or
- the business number (BN) of a business. If you enter a BN, you are authorizing CRA to deal with anyone from that business.

This representative will have access to all tax years.

**\* RepID, GroupID or BN (required)** ?

This authorization allows your representative to deal with the CRA by internet, by telephone, in person, or in writing.

Next

# Recommendations

- Review the list of authorized representatives periodically.
- Once you change tax preparers or stop working with one, always delete their authorization to remove their access.

905-334-5856

manzada@outlook.com