Authorized Representatives Management

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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 or call you 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

XXXXX 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 information for refunds, CSB and GST/HST payments**
Branch:
Account:
Last updated:

Canada Child Benefit (CCB) payment

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

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
authorized representative(s)	Does not expire	Yes	View online transactions

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

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“ form the list, this will display the representative details
9. Click on “Delete” and follow the prompts

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.

Government of Canada Gouvernement du Canada

Canada Revenue Agency

Sign out

Personal profile

Authorized representative(s) list

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Add an authorized representatives

5. Click on “authorize a new representative” and provide the representative ID [1] number (My ID is **ZV9SR6P**) and follow the prompts.

6. Provide the information as per the below.

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

[1] The Representative ID or RepID - is a unique **seven-character alphanumeric code** assigned by the Canada Revenue Agency to the tax preparers / advisors.

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.

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