

A.

How to list Income Tax Plus as your authorized CRA representative

To allow us to act on your behalf with the Canada Revenue Agency, you need to authorize Income Tax Plus as your representative. This gives us secure access to view and manage your tax information - and help you faster.

If you have a CRA My Account

Step 1: Sign into your CRA My Account:

Visit canada.ca/my-cra/account and log in using either your Sign-In Partner (online banking) or CRA Login Credentials.

Step 2: Authorize Income Tax Plus as a representative.

- select, "Profile"
- then "Authorized Representatives"
- select, "Add a Representative"
- enter our Business Number **131064008**
- select, Level 2 Access

You can create a CRA My Account by following the steps on the other side of this guide.

If you are unable to access your CRA My Account, contact the CRA General Inquiries at **1-800-959-8281**

If you do not have a CRA My Account

If you do not have a CRA My Account, we can submit an authorization request on your behalf **if we have all of the following information**. Please attend the office in-person.

- social insurance number
- date of birth
- current address
- a copy of a Notice of Assessment that is dated at least 6 months ago

We will require your signature to submit the authorization request.

If you are planning to file multiple years and do not have a Notice of Assessment, you can call the CRA General Inquiries at **1-800-959-8281** and request that they send you all tax slips for unfiled tax years.

B.

How to add your Business to your existing My CRA Account

Follow these steps to add your business to your My CRA Account rather than registering a separate My Business Account. This allows you to skip the identity verification steps because you have already done so when registering for My Account.

- 1. Log into your My CRA Account.**
- 2. Select, "Add Account"**
- 3. Select, "Add Business Number"**

C.

How to create a CRA My Account

Creating a CRA My Account allows you to manage your tax information, view notices, track refunds, authorize or cancel representatives and more. Visit canada.ca/my-cra-account to get started!

1. Do you need to register?

If you have already registered for My Account, My Business Account or Represent a Client using a CRA user ID and password or a Sign-In Partner, you **cannot** register again. If you have created an account that you can no longer access, you need to contact the CRA directly at **1-800-959-8281**.

Gather your information

2.

When you register with the CRA, you will need **all** of the following:

- social insurance number (SIN)
- date of birth
- amounts reported on your most recent tax return

For instant access to your CRA account, you will also need a mobile device with a working camera and your Canadian driver's license or passport.

3.

Choose a sign-in option

Choose either a **Sign-In Partner** to use your online banking credentials or, **CRA User ID and Password**.

Verify your identity

4.

Once you have created a user ID and password, or successfully logged-in using a sign-in partner you can verify your identity by;

- waiting for your CRA security code to come to you by mail. (10 business days) After you receive your code, sign into your CRA account using your User ID and password and enter your code before it expires
- or, by using the document verification service to verify your identity immediately. You will need a mobile device with a camera and your Canadian driver's license or passport.

5.

Authorize a representative and explore!

Follow the instructions on the other side of this guide to authorize Income Tax Plus as a representative.

Now that you've registered you can view Notices of Assessment, check your TFSA and RRSP contribution room, track refunds, update your personal information and more!

D.

How to contact the CRA if you've been locked out of your My Account

If you've been locked out of your My Account, you will need to call for assistance. Follow these steps to speak with an agent who can assist you.

Call the CRA at **1-800-959-8281**

Press 1. for **English**

Press 2. for **Help with My Account**

Press 1. for **New Registrations**

Press 2. for **Existing Accounts**