

CRA Authorization Process

HAMILTON & ROSENTHAL CPA LLP CAN ONLY BE AUTHORIZED BY YOU, TO ACT AS YOUR REPRESENTATIVE, THROUGH CANADA REVENUE AGENCY'S ONLINE MY ACCOUNT SYSTEM.

Please follow the detailed instructions below to set up Canada Revenue Agency (CRA) My Account for individuals/businesses.

- *If you already have a CRA My Account, skip to step #3.*

1) How to Register for/Login to CRA My Account:

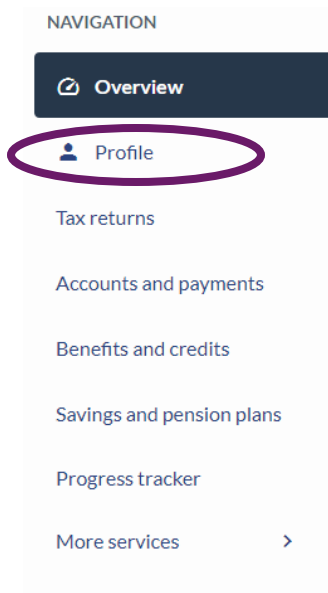
- ❖ Click on the link to access the login page for CRA My Account for individuals
 - [My Account for Individuals - Canada.ca](https://myaccount.cra.ca)
- ❖ Sign in using one of the following three options:
 - Use a sign in partner for logging in – this will log you in without having to wait for a code in the mail, but you will have to enter your banking login information to access this way.
 - If you already have a CRA ID and password you can use the CRA ID option, or at this step you can register for one.
 - *CRA will require information from your prior returns so you can call us if you need that information, then you wait for a code in the mail before you can finish the sign up.*
 - *This is the recommended registration method.*
 - Only use option three if you are a T1 client only. This will log you in using your My Alberta Digital ID.
 - *If you are going to need to access a My Business Account is it recommended that you register for the CRA ID login method.*

2) How to Login to Your CRA My Business Account:

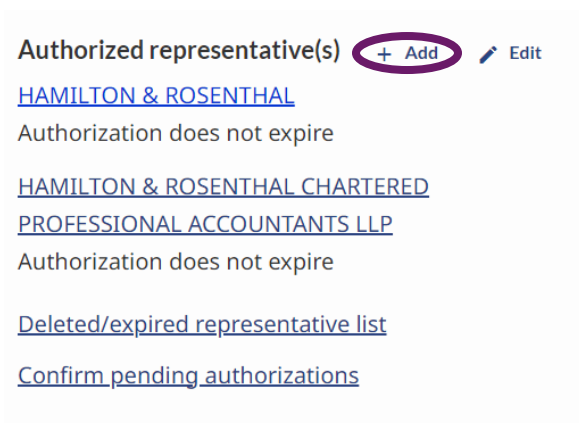
- ❖ A business owner who has already registered for [My Account for Individuals - Canada.ca](https://myaccount.cra.ca) can simply login to [My Business Account](#) using their existing My Account for individuals login information and add their business number to their existing account.
- ❖ You can only complete this if your name and social insurance number match the information the CRA has on file for your business. If you get an error message at this step, you will need to [contact the CRA](#) to update your records.

3) How to Authorize Hamilton & Rosenthal CPA LLP:

- ❖ First make sure that your CRA My Account is set-up, and you can log in.
 - Log in to either your CRA My Account for individuals or your CRA My Account for businesses – depending on whether we are asking for authorization for you personally or your corporation.
 - Go to your profile – option will be on left hand side of page.



- Scroll down to find “Authorized representative(s)” and click on “Add”



- Confirm that you would like to add a representative by clicking next.
- Enter our Business Number – **123115024**

- Search and select Hamilton & Rosenthal Chartered Professional Accountants LLP.

1 Enter representative information

Fields marked with an asterisk (*) are required.

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

- the representative identifier (RepID); or
- 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.

* RepID, GroupID or BN

123115024

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Next

- Enter in the following authorization information:

- Authorization level – Level 2
- Online access – Yes
- No expiration date necessary – you can delete representatives at any time.

2 Enter representative authorization

Fields marked with an asterisk (*) are required.

* 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 make changes to your account

* Online access

Yes

No

Expiry date (optional)

If no expired date is selected, the authorization will be valid indefinitely