Authorizing a representative

Follow the steps below to give your representative access to your tax information.

How to authorize your representative using My Account

This method will provide your representative with immediate access to your tax account. If you are not registered for a CRA account, which includes access to My Account, go to canada.ca/cra-registration

Option 1 Add a representative using My Account

- Contact your representative to get their registered RepID, GroupID, or Business Number (BN).
- Sign in to your CRA account
- On the **Welcome** page, select your **Individual** account to access My Account
- Select **Profile** from the left-side menu

Add authorization request

- Select +**Add** in the **Authorized representative(s)** section
- Read the **Before you begin** information and select **Start**

Step 1 Enter representative information

- Enter your representative's **RepID, GroupID**, or BN, **select Search to confirm the details,** then select **Next**

Katalyst CPA BN: 72684 6512

Step 2 Select authorization details

- Select the applicable **Authorization level** option (Level 1 or Level 2)
- Select **Yes** to give **Online access** or select **No** to give only offline access to your accounts
- Enter an **Expiry date** if desired, or select the box **Does not expire**, then click **Next**

Step 3 Review and confirm

- Review the information provided
- Select the **I confirm that the CRA may deal directly with the above named representative**… box, then select **Submit**.
- You will receive confirmation that the representative has been successfully authorized on your account.