Submitting an authorization request through Represent a Client

Follow the steps below to submit an authorization request to gain online access to your client's information.

Accessing the Authorization request service

If you are not registered for a CRA account, which includes access to Represent a Client, go to canada.ca/cra-registration. These instructions are for persons already registered for a **CRA account**.

- Sign in to your CRA account.
- On the **Welcome** page, select your **Representative** account to access Represent a Client
- Select **Authorization request** from the left-side menu
- Select the appropriate representative identifier – RepID, GroupID, or BN – from the **List of representative identifiers** drop-down and select **Submit**

Step 1 Add authorization request

- Select **Add authorization request**
- Select **Individual client**, then select + **Add**
- Read the **Before you begin** information and select **Start**

Add authorization information

- Within Taxpayer Information, enter your client's information
- Select the applicable **Certified by** option
  - If you selected the **Taxpayer** button, select **Next** and proceed to Step 2 below
  - If you selected the **Legal Representative** button
    - Select the option **Individual**, **Group ID**, or **Business** that applies to the legal representative
    - Enter the information requested, and select **Next** and proceed to Step 2 below

Step 2 Select authorization level

- Select the applicable **Level of authorization** option (Level 1 or Level 2)
- Enter an **Authorization expiry date** or select the box **Does not expire**, and select **Next**

Step 3 Taxpayer validation enhancement

- Select the applicable **Confirmation method** option
  - If you selected the **Client will confirm in My Account** option, select **Next** and proceed to Step 4
  - If you selected the **Representative to provide tax information** option:
    - Enter - in dollars only - **the amount assessed** on the tax line for the indicated tax year and, select **Next**, and proceed to Step 4

NOTE: If your client is unable to register for My Account nor provide tax information, Represent a Client may prompt you to obtain signed consent from your client, which you must then submit as part of the authorization process. Even with this information provided, the CRA may still contact your client by phone to verify your request.

Step 4 Review and submit

- Review the authorization request information
- Select the **I confirm that the information is correct** box, then select **Confirm**

Finalizing your Request

If you selected **Client will confirm in My Account** (per Step 3 above):

- Ask your client to confirm your pending authorization request in their My Account to complete the authorization process
- If confirmed, you will be given instant access to the account

If you selected **Representative to provide tax information** (per Step 3 above):

- A Confirmation page will be displayed on your screen
- Select **Proceed to signature page** (at the bottom of the page) to obtain a copy of the document for your client to sign
- **Print** the signature page
- Submit **the signed copy** of the signature page page in **Authorization request** using the **Submit** button, in your **Pending authorization requests** table, within 30 business days
- Once submitted, you will be given instant access to the account

If you selected **Certified by Legal Representative** (per Step 2 above):

- A Confirmation page will be displayed on your screen
- Select **Proceed to signature page** *(at the bottom of the page)* to obtain a copy of the document for your client to sign
- **Print** the signature page
- Submit **the signed copy** of the signature page in **Authorization request** using the **Submit** button, in your **Pending authorization requests** table, within 30 business days
- Inform your client that the CRA may contact them by phone to verify the request

If you **were not prompted to select a confirmation method** (per Step 3 above):

- A Confirmation page will be displayed on your screen
- Select **Proceed to signature pag**e (at the bottom of the page) to obtain a copy of the document for your client to sign
- **Print** the signature page
- Submit **the signed copy** of this page in **Authorization request** using the **Submit** button, in your **Pending authorization requests** table, within 30 business days
- Inform your client that the CRA may contact them by phone to verify the request