



[Canada.ca](#) › [Taxes](#) › [Income tax](#) › [Personal income tax](#) › [Free tax clinics](#)

› [Volunteer at a free tax clinic](#) › [CVITP learning guide](#) › [CRA electronic services](#)

CRA electronic services

# Represent a Client

## On this page

- [About Represent a Client](#)
- [How to access an individual's account](#)
- [How to confirm your affiliation with the CVITP group](#)



[PDF version](#)

## About Represent a Client

When you submit an authorization request using Auto-fill my return (AFR), you become authorized to access an individual's account. You may now use your CRA credentials to sign in to [Represent a Client](#) and view the individual's information online for a limited period.

To be authorized on an individual's account, you must have a [RepID](#) and you must use the CVITP tax software to submit an authorization request for the individual.

Each person only has one RepID. If you already have a RepID, you do not need to register for a new one for CVITP purposes.

Increased access to an individual's information through Represent a Client improves the level of service volunteers can provide. This is particularly helpful when an individual is missing information that cannot be retrieved through AFR or when they do not meet confidentiality requirements over the phone.

There are several services available for representatives with Level 1 (view only) authorization. The information that is available to authorized volunteers using Represent a Client includes:

- benefits and credits overview
- Canada Child Benefit and related provincial and territorial programs payments, account balance, and statement of account
- carryover amounts and disability tax credit
- tax returns, and notices of assessment or reassessment
- universal child care benefit payments, account balance, and statement of account

As a volunteer, you cannot view an individual's date of birth (DOB) or address through Represent a Client.

**Represent a Client login page**

Choose from one of two ways to access Represent a Client:

### Option 1 – Using one of our Sign-In Partners

Sign in or register with the same sign-in information you use for other online services (for example, online banking).

**Sign-In Partner**

For the security of your CRA account, when you are on your Sign-In Partner website, ensure it is **your** information that is entered and not that of somebody else.

► [View list of Sign-In Partners](#)

### Option 2 – Using a CRA user ID and password

Sign in with your CRA user ID and password, or register.

**CRA sign in**

[CRA register](#)

#### ▼ Text version of the above image

Choose from one of two ways to access Represent a Client:

Option 1 – Using one of our Sign-In Partners

Sign-In Partner is highlighted

Option 2 – Using a CRA user ID and password

CRA sign in is highlighted

- To view an individual's information online, choose from one of two ways to access Represent a Client: Sign-In Partner or CRA login.

# Multi-factor authentication – telephone number and delivery method



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## Canada Revenue Agency

### Multi-factor authentication—telephone number and delivery method

\* Select the telephone number where you would like your one-time passcode sent. *(required)*

☒ \*\*\* - \*\*\* - XXXX Cell 1

If you select "Text me", the passcode will be sent by Short Messaging Service (SMS) only once each time you select this delivery message. You will need to open the text message to read the passcode. If you select "Call me", the passcode will be verbally provided to you in an automated message. Once the passcode is sent it will expire in five minutes. Have your telephone handy.

Screen ID: AMS.tfa4

Date modified: 2023-02-06

#### ▼ Text version of the above image

Multi-factor authentication page - telephone number and delivery method

Text me button is highlighted

Call me button is highlighted

If you're already enrolled in the multi-factor authentication process, the last four numbers in the cell or landline telephone number you provided is displayed onscreen.

- Choose your preferred method to receive the one-time passcode; **Text Me** for a Short Messaging Service (SMS), or **Call Me** for an automated call.

## Passcode entry page



## Canada Revenue Agency

### Multi-factor authentication—passcode entry

The CRA sent you a six digit one-time passcode by Text message to the following telephone number: \*\*\* - \*\*\* - xxxx .  
Enter the passcode below, it will expire after five minutes.

**\* One-time passcode (required)** ?

If you did not receive the one-time passcode, you may request a new one by selecting the link below. The CRA will resend a new passcode to the telephone number you previously selected. This can take a few minutes.

[Request a new one-time passcode](#) ?

If you added more than one telephone number you can also send the one-time passcode to a different number by selecting the link below. You can also change the delivery method by selecting this link.

[Send to a different telephone number or change delivery method](#)

**\* One-time passcode preference (required)**

- ☒ Ask me to input a one-time passcode each time I sign in using this device (recommended if you are using a public or shared device).  
☐ Do not ask me to input a one-time passcode for the next eight hours when I sign in using this device.

For more information on how your privacy is protected, refer to our [Personal Information Collection Statement](#).

Next

Exit

Screen ID: AMS.tfa2

Date modified: 2022-02-07

#### ▼ Text version of the above image

Multi-factor authentication page - passcode entry

One-time passcode field is highlighted

Next button is highlighted

- Enter the **one-time passcode** and click **Next**.



#### Important note

If you are using an older browser that does not support the latest security standard, you may not be able to access the CRA's secure online services. For more information on tested

browsers, refer to [Your browser - Canada.ca](http://Your browser - Canada.ca).

# How to access an individual's account

## Access Client Information page

**Represent a Client**

- Review and update
- Submit documents
- Authorization request
- List of notices issued
- Mail
- Download options
- Trust account registration
- Help with this page

### Welcome M. REPRESENTATIVE

#### Access Client Information

To access information on behalf of clients, the CRA must have authorizations on file from these clients granting online access.

Enter the Social Insurance Number (SIN) or the Business Number (BN) of the account you want to access:

**\* SIN (9 digits) (required)**

**Access SIN**

**\* BN (9 digits) (required)**

**Access BN**

### ▼ Text version of the above image

Access Client Information page

SIN (9 digits) (required) field is highlighted

Access SIN button is highlighted

- On the welcome page, enter the Social Insurance Number (SIN) of the individual and click **Access SIN**.

# How to confirm your affiliation with the CVITP group

## Access Client Information page

<b>Represent a Client</b>	<h2>Welcome M. REPRESENTATIVE</h2>
Review and update	<h3>Access Client Information</h3>
Submit documents	To access information on behalf of clients, the CRA must have authorizations on file from these clients granting online access.
Authorization request	Enter the Social Insurance Number (SIN) or the Business Number (BN) of the account you want to access:
List of notices issued	<b>* SIN (9 digits) (required)</b>
Mail	<input type="text"/>
Download options	<input type="button" value="Access SIN"/>
Trust account registration	<b>* BN (9 digits) (required)</b>
Help with this page	<input type="text"/>
	<input type="button" value="Access BN"/>
	<h3>Administration</h3>
	<a href="#">Review and update</a> includes a number of tools to help you manage your online access, such as:
	<ul style="list-style-type: none"><li>• view client list(s)</li><li>• associate employees to a business</li><li>• create a group</li><li>• view RepID information</li><li>• registering a business</li></ul>

#### ▼ Text version of the above image

Access Client Information page

Administration section

Review and update is highlighted

- To confirm if you're affiliated, click **Review and update** under the **Administration** heading.

### Review and update RepID page

Represent a client

Review and update

Submit documents

Authorization request

List of notices issued

Mail

Download options

Trust account registration

Help with this page

## Review and update RepID

Name:

RepID:

Manage associations

Manage clients

RepID information

[View associations](#)

[Create a group](#)

[Register my business with Represent a Client](#)

[Associate my RepID to my business as an owner](#)

▼ Text version of the above image

Review and update RepID page

Under Manage associations tab

View associations is highlighted

- Under **Manage associations**, click **View associations**.

## View associations page

Canada Revenue Agency

Sign out

Represent a Client

Review and update

Submit documents

Authorization request

List of notices issued

Mail

Download options

Trust account registration

Help with this page

## View associations

RepID:

Name:

As of September 29, 2022 your RepID has the following association. Associations that have expired or have been cancelled are not shown on this list.

**To remove yourself from a group, select the group name.**

Group name	Group ID	Role
CVITP/PCBMI		Junior Representative

▼ Text version of the above image

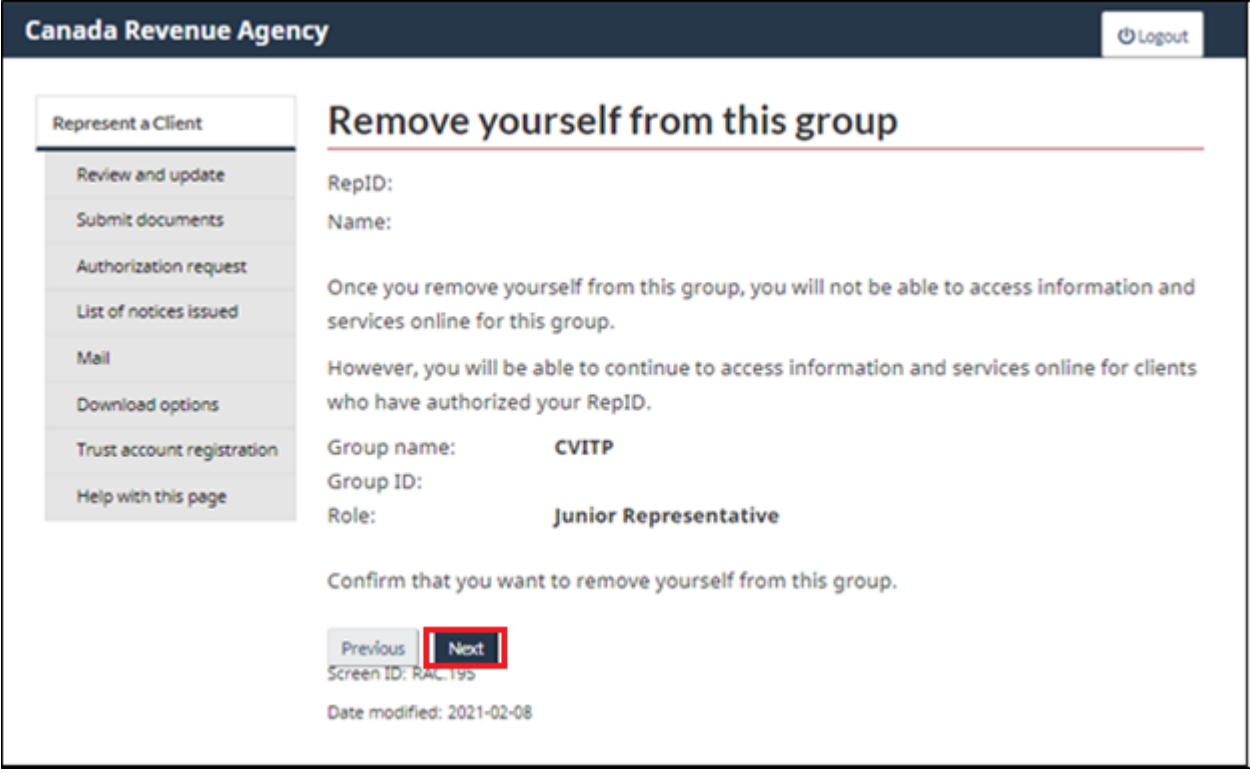


View associations page  
CVITP/PCBMI is highlighted

The **View associations** page shows a list of all groups you are affiliated with.

- If you wish to remove yourself from an affiliated group, you can click on the applicable group name.

## Remove yourself from this group page



The screenshot shows the 'Remove yourself from this group' page in the Canada Revenue Agency system. The page has a dark blue header with the 'Canada Revenue Agency' logo and a 'Logout' button. On the left, there is a sidebar menu under the heading 'Represent a Client' with options: 'Review and update', 'Submit documents', 'Authorization request', 'List of notices issued', 'Mail', 'Download options', 'Trust account registration', and 'Help with this page'. The main content area has the title 'Remove yourself from this group' and a red underline. Below the title, it asks for 'RepID:' and 'Name:'. A warning message states: 'Once you remove yourself from this group, you will not be able to access information and services online for this group. However, you will be able to continue to access information and services online for clients who have authorized your RepID.' Below this, it shows 'Group name: CVITP', 'Group ID:', and 'Role: Junior Representative'. A confirmation prompt says 'Confirm that you want to remove yourself from this group.' At the bottom, there are 'Previous' and 'Next' buttons, with the 'Next' button highlighted with a red border. Below the buttons, it says 'Screen ID: RAL-199' and 'Date modified: 2021-02-08'.

### ▼ Text version of the above image

Remove yourself from this group page  
Next button is highlighted

- The website prompts you to confirm if you wish to proceed to **Remove yourself from this group**.
- If you wish to proceed, click **Next**.

## Remove yourself from this group: Confirmation page

**Canada Revenue Agency**

Logout

Represent a Client

Review and update

Submit documents

Authorization request

List of notices issued

Mail

Download options

Trust account registration

Help with this page

### Remove yourself from this group: Confirmation

You are no longer associated to this group.

Screen ID: RAC.196

Date modified: 2021-02-08

### ▼ Text version of the above image

Remove yourself from this group: Confirmation page is displayed

- You are now removed from that group.

To learn more on how to navigate in the Represent a client portal, refer to the [Using the Represent a Client service](#) job aid.

#### Date modified:

2024-02-19