

How to Authorize a Representative for my Business account?

STEP 1: register for a My Business Account

You can use one of two methods:

1. You can use a bank sign in partner *if you already have online banking access* with one of the following banks:

Affinity Credit Union	National Bank
ATB Financial	RBC Royal Bank
BMO Bank of Montreal	Scotiabank
CIBC	Servus Credit Union
Caisse Alliance	Simplii Financial
Coast Capital	Tangerine
Conexus Credit Union	TD Canada Trust
Desjardins	Uni
Libro Credit Union	Vancity

2. Set up a CRA login account. This is a two-step process:

Set up a My Business Account. Go to:

<https://www.canada.ca/en/revenue-agency/services/e-services/e-services-businesses/business-account.html>

(We recommend saving this as a bookmark in your web browser. You can also search for “CRA login”.)

Enter your SIN

Enter the postal code that CRA has on your file

Enter your date of birth

Have your last 2 years of personal tax returns available to answer a security question from your taxes

Create a CRA User ID and password (passwords have restrictions and should be unique – no repeats)

Set up security questions and answers

Enroll in multi-factor authentication (generally with your cell phone)

CRA will mail you a security code to your mailing address that they have on file

Enter your business number

Log out after unless you want to enroll for paperless documents with your email address

WAIT for Canada Post to send a letter

When you receive the security code, return to the link above. Choose Option 2 CRA sign in and log in

Enter the CRA security code from the letter

It may ask if you want to “Go Paperless” – you can answer “No thank you”

After you can see your business tax information.

STEP 2: Authorize a Representative

Click on the Profile icon near the top of your screen

In the “Authorized Representatives” box, click on Manage authorized representatives

Click on Authorize a Representative

Enter our business number: **887783611**

Choose Authorization level as **Level 2**

Say **Yes** to Online access

Leave the **Expiry Date blank**

Confirm the authorization

If there are old authorizations, you can Edit and Delete any old ones.