Vistaar Advisory
Chartered Professional Accountant

How to Add an Authorized Representative for Personal Tax (CRA)

Step 1: Log in to CRA My Account

• Go to the CRA website
• Sign in using CRA credentials or Sign-In Partner
• Select "My Account" for individuals

Step 2: Go to Authorized Representatives

• From the dashboard, click "Profile"
• Select "Authorized representatives"

Step 3: Add a New Representative

• Click "Add"
• Select "Authorize a representative"

Step 4: Enter Representative Information

• Enter the representative's RepID (as provided to you by the accountant)

Step 5: Choose Level of Authorization

• Level 1 – View only
• Level 2 – View & update (recommended)

Step 6: Set Access Period

• Select a start date
Note: No end date

Step 7: Review and Confirm

• Review all information carefully
• Click "Confirm" or "Submit"

Authorization is effective immediately once submitted. 😊