

How to confirm a new representative using My Account

Follow these steps to confirm a new authorized representative or to accept changes to the authorization level of an existing representative using the new “Confirm my Representative” service.

1. The first step is to make sure you have My Account. If you haven't used these services before, you will need to register for an account. You can check out the video below for instructions on how to register. The basic steps from the video are available below the video link.
-

How to Register for My Account

Transcript highlights from the video:

- Start at the My Account webpage at www.canada.ca/my-cra-account.
- Choose from two ways to register for My Account. One can register and create a CRA user ID and password **or** login using a Sign-in Partner.
- Have the following information ready when signing up for the account:
 - Social Insurance Number
 - Date of birth
 - Current postal code
 - The most recently filed tax return
- Sign up for online mail.

Upon receipt of the security code

- A letter will arrive in the mail from the CRA with a CRA security code.
- Note that one can also call the CRA to get the code earlier.
- Enter the code to have full access to even more information through My Account, including details about tax returns and benefits.
- Once registered, we recommend you enable email notifications to make sure you are notified when you receive a new authorization request. Email notifications let you know when you have mail to view in your account, and when important changes have been made to your account. Find out more about how to enable email notifications as an [individual](#)

Keep in mind that registration may take several days.

2. The next step involves your representative. They will need to sign in to Represent a Client to submit a new authorization request. When submitting this request, they will need to include a certification page signed by you or your delegated authority to complete the request. We use an encrypted, secure form.

3. Once your accountant has submitted a request, and if you have enabled email notifications, you will be notified by email that someone has requested access to your account. You must then sign in to [My Account](#), where you can review your pending authorization request in the Authorized Representatives section of your account. You can then confirm or deny the request with the click of a button.
 4. **You must confirm or deny the authorization request within ten business days, or the request will be cancelled and your representative will need to submit a new one.**
-