Telephone: (905) 768-0807 or (289) 282-1168 **Fax:** (905) 768-1378 <u>office@bruynsaccounting.com</u> 33 Main Street South, PO Box 567 Hagersville, Ontario NOA 1H0

Registration Process to Access the CRA Sign-In Services

My Account:

Go To: https://www.canada.ca/en/revenue-agency.html

1. How do I register for a CRA user ID and password?

Step 1- Register With CRA

- Select "Sign in to a CRA Account"
- Choose "My Account"
- Scroll to "Option 2-Using a CRA User ID and Password"
- Click on "CRA Register"

Step 2 – Provide Personal Information

- Enter your social insurance number.
- Enter your date of birth.
- Enter your current postal code or ZIP code.
- Enter an amount you entered on one of your income tax and benefit returns. Have a copy of your returns handy. The line amount requested will vary, it could be from the current tax year or the previous one. To register, a return for one of these two years must have been filed and assessed.
- Create a CRA user ID and password.
- Create your security questions and answers. You can also decide if you want a persistent cookie added to your computer, so you can access CRA sign-in services using that same computer later without being asked for more identification.
- Enroll in mandatory multi-factor authentication by selecting your preferred method (telephone or passcode grid). For more information, see <u>multi-factor</u> <u>authentication</u>.

*After you complete step one of the registration process, you will have access to limited tax information on My Account. After you enter your CRA security code, you

will have access to the full suite of <u>services available</u> in My Account, as well as the <u>Auto-fill my return</u> service.

Step 3 – Enter the CRA security code

To access your account, return to <u>My Account for Individuals</u>, select "CRA sign in," and enter your CRA user ID and password. When prompted, enter your CRA security code.

You can sign in to CRA sign-in services with a **Sign-In Partner**. This option lets you sign in with the same sign-in information that you may already have, such as for online banking. For more information, see <u>Sign-In Partners Help and FAQs</u>.

You can sign in to CRA sign-in services with a **provincial partner**. This option lets you sign in with a provincial credential that you may already have, such as the BC Services Card or MyAlberta Digital ID. For more information, see <u>BC Services</u> <u>Card</u> and <u>MyAlberta Digital ID</u>.

How do I authorize representatives to access my account(s)?

Representatives acting on your behalf (including accountants and employees) can access your business account(s) through Represent a Client with their own CRA user ID and password and the business number for which you authorized access.

You can authorize your representatives (by their RepID, GroupID, or BN), change the level of authorization for existing representatives, or revoke authorizations using the online Authorize or manage representatives service in My Business Account. Online authorization updates are instant and will take effect immediately or on the effective date you choose.

You can also send a completed Business Authorization Request Form.

For further details, go to: Authorize a representative - Business number

- Once your representative has submitted an authorization request electronically, select the pending request to confirm or deny access to your personal income tax account
- Go to "Profile" and scroll down to "Authorized Representative(s)". Select "Authorized representative(s)" to view all current representatives authorized on your personal income tax account
- Select "View online transactions" to monitor the activities of your representatives on your personal income tax account
- Add or delete representatives from your personal income tax account

When adding Us as A Representative:

- Select "Level 2"
- Select "Online Access"
- Enter Our Business Number: 895805794
- Company Name: 1169975 Ontario LTD.

Questions You May Have:

1. What do you mean by current postal code or ZIP code?

As part of your personal authentication information, you will have to enter the postal code or ZIP code of your current mailing address. If you live outside Canada and the United States, the postal code or ZIP code is not required. The postal code or ZIP code field is not case sensitive and may or may not include spaces or dashes.

2. How do I get a CRA security code?

If you have completed the registration process through My Account for Individuals, My Business Account, Represent a Client, the MyCRA app, MyBenefits CRA app, or the CRA BizApp, you will be issued a CRA security code. The CRA security code has an indicated expiry date. Follow the provided instructions before the code expires, or you will have to <u>Contact us</u> to have a new CRA security code issued to you.

If you choose to have the code mailed, we will mail it to the address we have on file. <u>Have you moved recently</u>? If you are blind or partially sighted, you can ask to receive your personal correspondence from the CRA in an <u>alternate format</u>.

3. Where do I enter my CRA security code?

Once you receive your new CRA security code, return to the <u>CRA sign-in services page</u>, and select the service you registered with. If you registered for a CRA user ID and password, select the CRA sign in option, or, if you registered using the Sign-In Partner service, select the Sign-In Partner option. Follow the online instructions, and enter your CRA security code when prompted.

4. Can I use the same user ID and password to access all the CRA sign-in services?

Yes. After you register for a CRA sign-in service, you can use the same CRA user ID and password to access all the CRA sign-in services. However, for some services, more identity information may be needed.

5. I am visually impaired. Can I receive my CRA security code in an alternate format?

The CRA offers forms, publications and correspondence in multiple formats for persons with a visual impairment. These formats include Braille, e-text (CD), MP3, or large print. If you would prefer to receive the CRA security code letter and other personal correspondence from the CRA in an alternate format, call 1-800-959-8281 for more information.

6. How do I create my CRA user ID and password?

When you create your user ID and password, we recommend that you:

- make them easy for you to remember and hard for others to guess;
- avoid using personal information such as your name, social insurance number, mailing address, or email address;
- always use unique passwords for your CRA and online banking accounts. Do not reuse the same password for different accounts or systems; and
- always keep this information secure and do not share it with anyone.

You will not be able to proceed with the creation of a user ID and password unless you follow these rules:

User ID

Your user ID must contain between 8 and 16 characters with no spaces, and can contain up to seven digits. The only special characters you can use are: dot (.), dash (-), underscore (_), and apostrophe (').

Note

Each user ID must be unique. You will receive a message if the user ID you create has already been used.

Password

Your password must contain between 8 and 64 characters, one upper-case letter, one lower-case letter, one digit, no space, and no accented characters. The only special characters you can use are: dot (.), dash (-), underscore (_), and apostrophe ('). You cannot use more than 4 consecutive, identical characters. The password and the confirm password must match.

7. I have forgotten or misplaced my CRA user ID and/or password. Is there any way that I can recover them?

If you have forgotten your CRA user ID for any of the following CRA sign-in services, you **can** recover it.

- <u>My Account</u>
- My Business Account
- Represent a Client
- Sign in to MyCRA
- Sign in to MyBenefits CRA
- Sign in to CRA BizApp
- <u>Change my direct deposit</u>
- Change my address

To recover it, return to the service you want to use and select "CRA sign in". On the CRA sign in page, select "Forgot your user ID?" and follow the instructions.

If you have forgotten your CRA user ID for any of the following CRA sign-in services, you **cannot** recover it. You have to register again.

<u>Tax information web service</u> (includes Auto-fill my return, T2 Auto-fill, Express NOA, Account Information Retrieval Service and Canada Digital Adoption Program)

If you have forgotten your CRA user ID for the Candidate profile service, you have to complete the candidate profile recovery process to create a new CRA user ID. This will allow your new CRA user ID you register for during the recovery process, to be linked to your existing candidate profile.

Candidate profile recovery

If you are a new user, you will need to <u>register</u> before using the Candidate profile service.

CRA Password

If you have forgotten or misplaced your CRA password, you can create a new password, provided you respond correctly to the security questions you selected and answered when you registered.

To create a new password, return to the service you want to use and select "CRA sign in". On the CRA sign in page, select "Forgot your password?" and follow the instructions.

8. How do I manage my CRA security options such as, revoke my CRA user ID, change my password, change my security questions and answers, etc.?

To manage any of the following CRA security options, you must **first sign in to a service**. Once you have signed in, you can access these options on the "CRA sign in and security options" page.

- Change CRA user ID
- Change CRA password
- Change CRA security questions and answers
- Update additional security feature preference
- Revoke CRA user ID
- View the Terms and conditions of use
- View recent CRA sign in history

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- Create a CRA user ID and password.
- Create your security questions and answers. You can also decide if you want a
 persistent cookie added to your computer, so that you can access CRA sign-in
 services using that same computer later without being asked for more
 identification.

- Enroll in mandatory multi-factor authentication by selecting your preferred method (telephone or passcode grid). For more information, see <u>multi-factor</u> <u>authentication</u>.
- Enter your business number.

Step 3 – Enter the CRA security code

To access your account, return to <u>My Business Account</u>, select "CRA sign in," and enter your CRA user ID and password. When prompted, enter your CRA security code.

You can also sign in to CRA sign-in services with a **Sign-In Partner**. This option lets you sign in with the same sign-in information that you may already have, such as for online banking. For more information, see <u>Sign-In Partners Help and FAQs</u>.

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11. Where do I enter my CRA security code?

Once you receive your new CRA security code, return to the <u>CRA sign-in services page</u>, and select the service you registered with. If you registered for a CRA user ID and password, select the CRA sign in option, or, if you registered using the Sign-In Partner service, select the Sign-In Partner option. Follow the online instructions, and enter your CRA security code when prompted.

12. Can I use the same user ID and password to access all the CRA sign-in services?

Yes. After you register for a CRA sign-in service, you can use the same CRA user ID and password to access all the CRA sign-in services. However, for some services, more identity information may be needed.

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