



Authorization & Engagement

CLIENT GUIDE

Before we can work on your file, we need two things from you: online authorization with the Canada Revenue Agency (CRA) and a signed engagement letter. Both are done online, and each takes only a few minutes.

Why we need authorization

The CRA will not discuss your tax matters with us, or give us access to your account, until you authorize us as your representative. Once you do, we can:

- Download your tax slips and information to prepare accurate returns
- View your notices of assessment, balances, and CRA correspondence
- Speak and write to the CRA on your behalf, including responding to CRA letters and reviews
- File returns and requests electronically, which is faster than mail

You stay in control. You choose what we can access, and you can remove our access at any time.

How to authorize us online

Choose whichever option is easiest for you. All authorizations are handled online, so there is nothing to mail.

Our CRA identifier

For your security, we send our CRA identifier directly to you in your welcome email or through our secure client portal. You will need it for Option 1 below.

Option 1: Authorize us yourself in your CRA account (fastest)

If you already sign in to your CRA account, this takes effect right away.

Individuals (personal taxes) — My Account

1. Sign in to your CRA account and open My Account.



2. Go to your profile and choose to authorize a representative.
3. Enter the CRA identifier we sent you.
4. Select **Level 2** access so we can act on your behalf.
5. Confirm and submit.

Businesses, charities and non-profits — My Business Account

1. Sign in to your CRA account and open My Business Account.
2. Go to the representatives section and choose to authorize a representative.
3. Enter the CRA identifier we sent you.
4. Choose the program accounts we will look after (for example, corporate income tax, GST/HST, payroll) and the access level.
5. Confirm and submit.

Option 2: We send you a request to accept

If you would rather not enter our identifier yourself, we can start the request for you:

1. We send an authorization request to the CRA online.
2. The request appears in your CRA account as **pending**: in My Account for personal taxes, or My Business Account for businesses.
3. Sign in, review the request, and accept it.

Please accept the request **as soon as you can**. If it is not accepted in time, the CRA cancels it and we have to send a new one.

Both options need your CRA account

The CRA no longer accepts signed paper or portal forms for online access. Whichever option you choose, you will need to sign in to your own CRA account. If you can't, see **Can't get into your CRA account?** below.

Don't have a CRA account yet?

You can register for one at canada.ca/cra-account. Once you are registered, use Option 1 or Option 2 above.



Access levels: what we can and can't do

Level	What it allows
Level 1	View your information only
Level 2 (recommended)	View your information and make certain changes, such as filing returns and requesting adjustments

We ask for Level 2 so we can fully handle your returns and CRA correspondence. Your authorization stays in place until you cancel it or until an end date you choose.

For your protection, a representative **cannot** change your personal information, update your direct deposit banking details, or access your Disability Tax Credit certificate. Only you can do those things.

Can't get into your CRA account?

You will need working access to your CRA account before you can authorize us. Here is how to get back in for the most common problems. If you get stuck, call the CRA using the numbers below. We are also happy to help you work through it.

You are locked out or forgot your password

- On the CRA sign-in page, choose **Forgot your user ID or password**. You will need your SIN, date of birth, and the amount on **line 15000** from one of your last two notices of assessment.
- If you still have access to your multi-factor authentication (text or phone code), you can use the CRA **Register again** option to set up new sign-in details yourself.
- If the CRA has locked your account for security reasons, only the CRA can unlock it. Call the number below.

You entered the wrong information when signing up

- The CRA checks what you enter against its records, so a small typo, an old address, or the wrong line amount will stop you. Avoid guessing repeatedly, as this can lock the account.



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- Have your **most recent notice of assessment** in front of you and check that your address matches what the CRA has on file.
 - Still stuck? Call the CRA. They can verify who you are over the phone and help reset your access.

You are behind on filing your taxes

- To register for a CRA account, you must have filed a tax return in the **last two years**. If you haven't, the CRA will not let you sign up yet.
- We can still help you catch up. Bring us your tax slips and records, and we will prepare and file your **most recent return** first.
- Once that return has been assessed, you can register for your CRA account and then authorize us for the rest.

You are waiting for a security code in the mail

- New registrations may require a code mailed to the address the CRA has on file. If you have moved, update your address with the CRA by phone first.
- During registration, you may be offered the option to verify your identity with photo ID instead, which is faster than waiting for mail.



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Calling the CRA

PERSONAL TAXES & ACCOUNT ACCESS

1-800-959-8281

Locked out, passwords, registration

BUSINESSES

1-800-959-5525

GST/HST, payroll, corporate tax

Monday to Friday, **6 a.m. to 6 p.m. Alberta time** (8 a.m. to 8 p.m. Eastern)

Before you call: what the CRA needs to verify you

The CRA will not discuss your account unless you can give them **all four** of these. Have them in front of you before you dial.

- ☐ **Social Insurance Number** (businesses: your Business Number)
- ☐ **Full name and date of birth** (businesses: the legal business name)
- ☐ **Your complete address**, including postal code, as the CRA has it on file (businesses: the business address)
- ☐ **A recent tax document**: your notice of assessment or reassessment, an assessed return, or another CRA tax document. Keep it open while you talk, as the agent may ask about details on it.

Tip: If you have moved, tell the agent. An old address on file is one of the most common reasons verification fails.

All CRA phone numbers

What you need help with	Call
Personal taxes and CRA account sign-in help (locked out, passwords, registration)	1-800-959-8281
Businesses (GST/HST, payroll, corporate tax, My Business Account)	1-800-959-5525
Charities	1-800-267-2384
TTY / Video Relay Service	1-800-665-0354



What you need help with

Call

Calling from outside Canada and the U.S.
(individuals, collect)

1-613-940-8495

Always make sure you are calling the real CRA. The CRA will never ask for payment by gift card or cryptocurrency. You can confirm these numbers at canada.ca/cra-contact.

Your engagement letter

The engagement letter is our written agreement with you. It sets out:

- The services we will provide (for example, personal tax returns, corporate returns, bookkeeping, or CRA representation)
- Our fees and how billing works
- What we need from you, and when
- Our responsibilities to you, including confidentiality

We send the engagement letter through **[portal name]**, where you can review and sign it electronically. We begin work once we have both your signed engagement letter and your CRA authorization.

New engagement letters are sent **[each year / when your services change]**.

Changing or cancelling our access

You can remove or change our authorization at any time, online in My Account or My Business Account. If you would like us to stop representing you, just let us know and we will confirm the change.

Your information is safe

We follow strict privacy and security practices. Documents are exchanged only through our secure client portal, never by regular email, and your information is used only for the services in your engagement letter.



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Need help?

We're happy to walk you through any step.

Phone: [phone number]

Email: [email address]

Online: Book an appointment at www.rcockwillcga.com