Represent a Client (RAC)

About this service

Represent a Client is a service that provides you with secure and controlled online access to tax information on behalf of a client.

- Anyone wanting to gain online access to tax information on behalf of individuals has to register with this service as a representative.

- A business (e.g., professional tax services) can also register with this service to be a representative of an individual.

Online access to tax information only becomes effective after a registered representative is authorized by an individual by signing a completed T1013.

How to use the service

1. **Create a CRA USER ID and password**
   A user ID and password that you use to login to thr "Represent A Client" service. You will need the Access Code from your Notice Of Assessment from the previour year.

2. **Register with this service**
   Register with this service and receive a representative identifier (RepID).
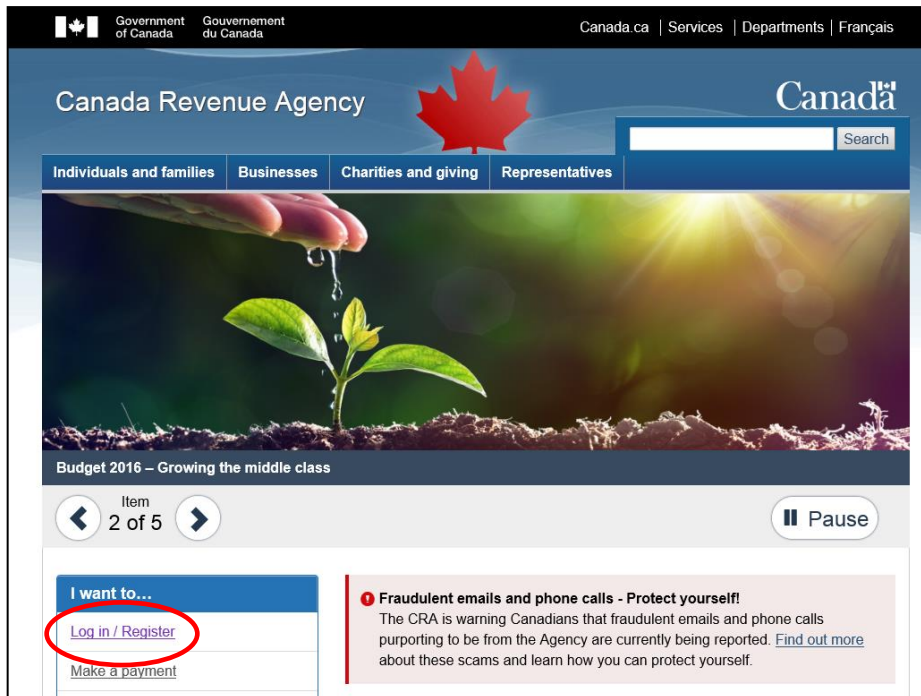
3. **Obtain authorization**
   Give your RepID to the Tax Shelter so they can authorize you to act on the firms behalf.

4. **Access individual information and services**
   After you are authorized you can access information and services on behalf of individuals who give you permission by signing a T1013 form.

Create a User ID

Go to the CRA Home page and click on Log in / Register to get started.
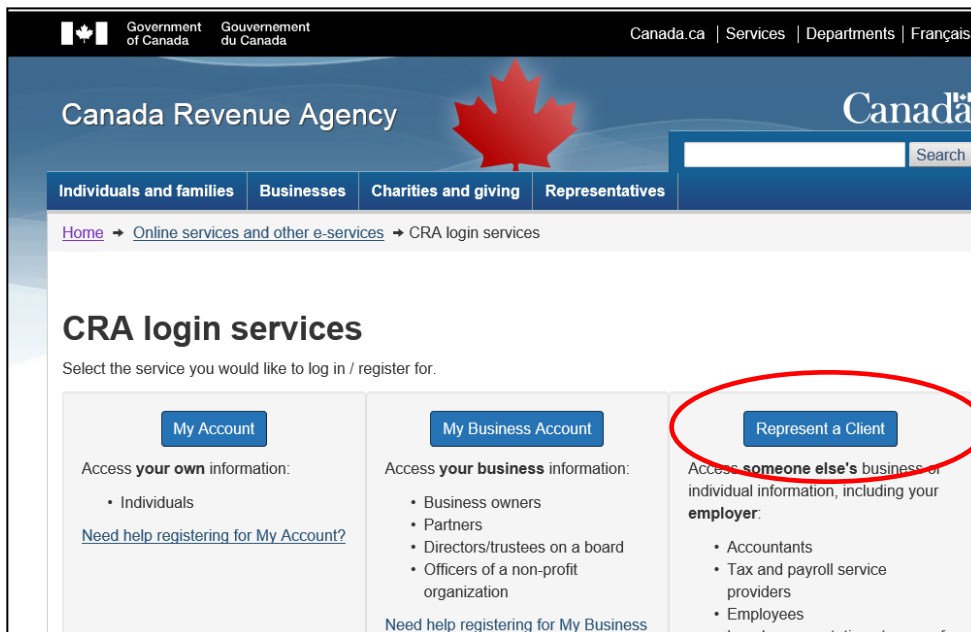
Click on **Represent A Client**.

Click on **CRA register**

Enter your Access Code from your NOA and Postal Code (See next page).

Access Code ✕

Enter the eight-character alphanumeric access code located on the top right side of your personal *Notice of Assessment*. This access code can be found on any *Notice of Assessment* issued after February 2002.

If you have not received a *Notice of Assessment* after February 2002, contact the *e-Services* Helpdesk. You should make every attempt to locate your *Notice of Assessment* before you contact us.

Note

The CRA can only disclose information about a taxpayer to the taxpayer or to their authorized representatives. Your *Notice of Assessment* access code and postal/ZIP code are required for the CRA to identify you and ensure that you are the person who has been authorized to access the taxpayer's information.

If you live in the United States and have a non-resident representative number, you must enter different information.

You will asked to create a CRA User Name and ID.

Create—CRA user ID and password

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

- make it easy to remember and hard for others to guess;
- avoid using personal information such as your name, social insurance number, mailing address, or email address; and
- always keep this information secure and do not share it with anyone.

Your user ID and password must meet the rules outlined below the fields.

* User ID (required) ❓

Johntaxpro

User ID checklist
✔ 8 to 16 characters
✔ No more than 7 digits
✔ No space
✔ No special characters except: dot (.), dash (-), underscore (_), and apostrophe (')

* Password (required) ❓

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* Confirm password (required)

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Password checklist
✔ 8 to 16 characters
✔ At least 1 upper-case letter
✔ At least 1 lower-case letter
✔ At least 1 digit
✔ No space
✔ No accented characters
✔ No special characters except: dot (.), dash (-), underscore (_), and apostrophe (')
✔ No more than 4 consecutive identical characters
✔ Both passwords match

For more information on how your privacy is protected, refer to our Personal Information Collection Statement.

Next   Exit

You will now be asked to create 5 security questions.

You must agree the Terms and Conditions

Terms and conditions of use

In return for the Canada Revenue Agency (CRA) providing you with a CRA user ID and password, you agree to abide by the following terms and conditions of use for this and all future uses of your CRA user ID and password:

1. You understand and accept that you are at all times responsible for your CRA user ID, password and security questions and answers. This responsibility applies even if you change the user ID, password and security questions and/or answers. This information must be kept confidential at all times and must not be shared with or disclosed to others.
2. If your password, user ID and/or security questions and answers are revealed or if you suspect that someone else has learned or obtained them, you are responsible for either revoking or changing your user ID, password and changing your security questions and answers. You must also advise the _e-Services_ Helpdesk immediately.
3. You agree not to use a CRA user ID and password for any illegal or improper activities.
4. You agree that you will not use any script, robot, spider, Web crawler, screen scraper, automated query program or other automated device or any manual process to monitor or copy the content in any online E-Services. You agree that you will not use any device, software or routine to interfere or attempt to interfere with the proper working of the CRA's online services, and that you will not disturb the normal operation of such services. You agree that you will not take any action that imposes an excessive, unreasonable or disproportionately large load on our infrastructure. You agree not to use the services in a manner that harasses or may harass other parties, or that will or will have the potential to disrupt, undermine, corrupt, diminish or otherwise threaten or jeopardize the CRA's online services or their integrity.
5. The CRA will monitor online access to ensure the online services are being used responsibly and in accordance with these terms and conditions.
6. You understand and accept that the Canada Revenue Agency can suspend or revoke your CRA user ID and password without notice under the following circumstances:
   - we suspect unauthorized use of your personal information or your CRA user ID and password;
   - as a security measure;
   - for operational reasons i.e. including, but not limited to, the use of scripts, web crawlers or screen scrapers;
   - for administrative reasons; or
   - if you fail to abide by the terms and conditions of use.
7. The CRA has taken all reasonable steps to ensure the security of this Web site. We have used sophisticated encryption technology and incorporated other procedures to protect your personal information at all times. However, the Internet is a public network and there is the remote possibility of data security violations. In the event of such occurrences, the CRA is not responsible for any damages you may experience as a result.
8. Without restricting the generality of the foregoing, the Canada Revenue Agency disclaims all liability for any claim in relation to:
   - any matters or factors outside of its control, including the availability or unavailability of the Internet, or telecommunications or other infrastructure systems;
   - the availability or unavailability of the Internet, or telecommunications or other infrastructure systems due to system maintenance;
   - the availability or unavailability of the CRA user ID and password service for any reason;
   - any illegal or fraudulent use of your CRA user ID or password; or
   - the use of your CRA user ID and password in a foreign country where such use is prohibited by the laws of that country.
9. These terms and conditions of use may be amended from time to time. When this occurs, you will be presented with the new version and asked to indicate your acceptance once again.

For more information on how your privacy is protected, refer to our Personal Information Collection Statement.

To indicate your acceptance of these terms and conditions of use, enter your password and select I agree.

User ID: Johntaxpro

* Password: *(required)*

     ⟵   Enter your password here

[I agree]   [I do not agree]

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On this screen select *"• register yourself as a representative"*

You will have to agree to the Terms and Conditions.

You will have to enter your name and telephone number.

You will be asked to verify your name and telephone number.

You will then be given a RepID which you can provide to the Tax Shelter who will authorize you to access client information when preparing his/her return. In addition you will be able to make adjustments to a return.