

## **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 the "Represent A Client" service. You will need the Access Code from your Notice Of Assessment from the previous year.

2. **Register with this service**

Register with this service and receive a representative identifier (RepID).

3. **Obtain authorization**

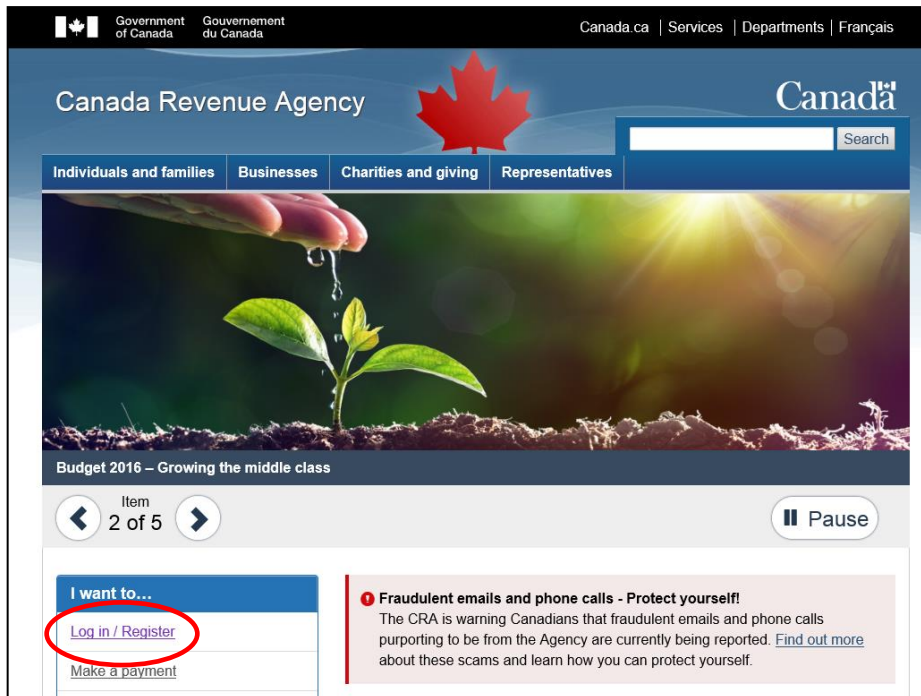
Give your RepID to the Tax Shelter so they can authorize you to act on the firm's behalf.

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.



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Budget 2016 – Growing the middle class

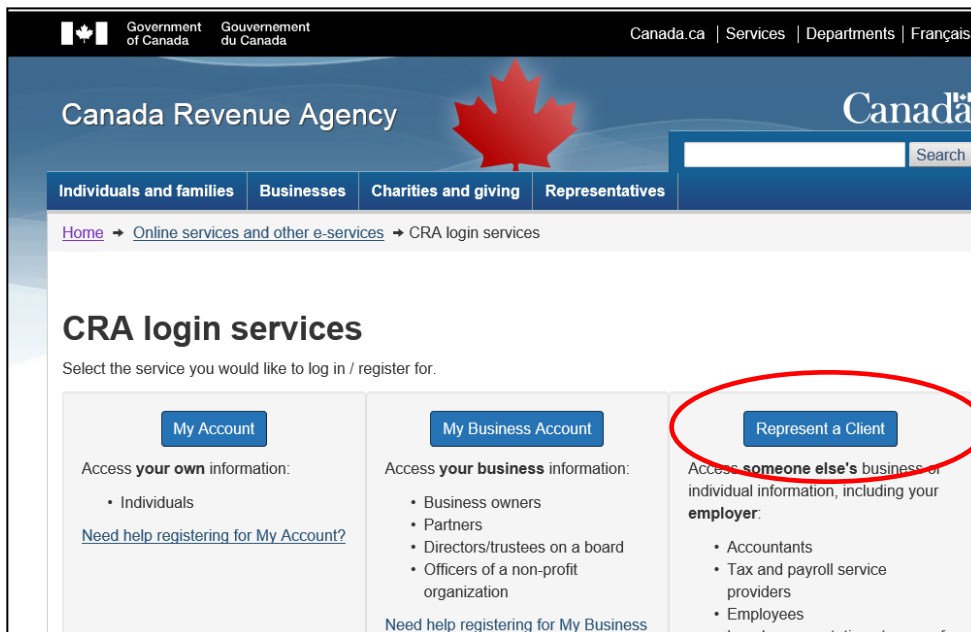
Item 2 of 5 | Pause

**I want to...**

- [Log in / Register](#)
- [Make a payment](#)

**Fraudulent emails and phone calls - Protect yourself!**  
The CRA is warning Canadians that fraudulent emails and phone calls purporting to be from the Agency are currently being reported. [Find out more](#) about these scams and learn how you can protect yourself.

Click on **Represent A Client**.



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Home → Online services and other e-services → CRA login services

## CRA login services

Select the service you would like to log in / register for.

<p><b>My Account</b></p> <p>Access <b>your own</b> information:</p> <ul style="list-style-type: none"><li>• Individuals</li></ul> <p><a href="#">Need help registering for My Account?</a></p>	<p><b>My Business Account</b></p> <p>Access <b>your business</b> information:</p> <ul style="list-style-type: none"><li>• Business owners</li><li>• Partners</li><li>• Directors/trustees on a board</li><li>• Officers of a non-profit organization</li></ul> <p><a href="#">Need help registering for My Business</a></p>	<p><b>Represent a Client</b></p> <p>Access <b>someone else's</b> business or individual information, including your <b>employer</b>:</p> <ul style="list-style-type: none"><li>• Accountants</li><li>• Tax and payroll service providers</li><li>• Employees</li><li>• Legal representatives (power of</li></ul>
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Click on **CRA register**

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## Represent a Client

Use this secure service to access tax information on behalf of individuals and businesses, including your employer.

Choose from one of two ways to access Represent a Client:

**Continue to Sign-In Partner**

- Use the same sign in information you use for other online services (for example, online banking).
- None of your information will be shared with CRA. Your Sign-In Partner will not know which government service you are using.
- You will temporarily leave the CRA website to use your Sign-In Partner.

► View the full list of Sign-In Partners

**CRA login** | **CRA register**

- Log in with your CRA user ID and password or register if you do not have a CRA user ID and password.
- [Forgot your password or user ID?](#)

**Help and FAQs**

- [CRA user ID and password](#)
- [Sign-in Partners](#)

GET ONLINE WITH THE CANADA REVENUE AGENCY

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

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## Validate your identity

Already registered and have a CRA user ID and password? [Login](#).

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

\* **Access code (required)** ⓘ

XRT12MP

\* **Postal code or ZIP code (required)** ⓘ

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For more information on how your privacy is protected, refer to our [Personal Information Collection Statement](#).

**Next** | Exit

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## 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.

Canada Revenue Agency / Agence du revenu du Canada  
NOTICE OF ASSESSMENT / 7451 E (12) 1

Date	Name	Social Insurance No.	Tax year	Tax centre
Aug 3, 2012			2011	

0000000

At a later date, we may review your return to verify income you reported or deducted, and credits you claimed. Keep all your slips, receipts, and other supporting documents in case we need to see them.

**Explanation of changes and other important information**

Thank you for filing your income tax return. This notice explains the results of our assessment and any changes we may have made. Please refer to the "Summary" area for additional information.

We are processing your claim separately for the goods and services tax/harmonized sales tax credit and any related provincial credit. We will let you know if you are eligible for these credits.

A Tax-Free Savings Account (TFSA) allows Canadian residents, who are 18 years of age or older, to earn tax-free investment income throughout their lifetimes. To find out how much you can contribute to your TFSA for 2012, go to [www.cra.gc.ca/myaccount](http://www.cra.gc.ca/myaccount) or call our Enquiries service at the number shown on this notice. For more information concerning TFSAs, go to [www.cra.gc.ca/tfsa](http://www.cra.gc.ca/tfsa).

Use My Account to access and manage your tax and benefit information online. Make changes to your return, check your RREP information, set up direct deposit and more. To register for My Account, go to [www.cra.gc.ca/myaccount](http://www.cra.gc.ca/myaccount).

If you have any questions about your assessment, please call our Enquiries service at 1-800-959-8281. If you need to contact another area of the Agency, see the telephone listings in the government section of your telephone book.

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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 be 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)** ?

### 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)** ?

**\* Confirm password (required)**

### 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](#).

You will now be asked to create 5 security questions.

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## Create—security questions and answers

Your [security questions and answers](#) should be easy for you to remember but hard for others to guess.

Your answers:

- must contain at least 3 characters
- are not case-sensitive

The only special characters you can use are:

- dot (.)
- comma (,)
- dash (-)
- apostrophe (')

\* **Question 1 (required)**

Select

\* **Answer 1 (required)**

\* **Question 2 (required)**

Select

\* **Answer 2 (required)**

\* **Question 3 (required)**

Select

\* **Answer 3 (required)**

\* **Question 4 (required)**

Select

\* **Answer 4 (required)**

Math

\* **Question 5 (required)**

What is the name of your first pet?

\* **Answer 5 (required)**

Spot

\* **Additional security feature preference (required)**

Ask me a security question each time I login using this device (recommended if you are using a public or shared device).

Do not ask me a security question each time I login using this device.

For more information on how your privacy is protected, refer to our [Personal Information Collection Statement](#).

**Next** Exit

# You must agree the Terms and Conditions

https://cms-sgj.cra-arc.gc.ca/gol-ged/awsc/cms/loc Canada Revenue Agency - ...

File Edit View Favorites Tools Help

re St John's Weekly Report...

## 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:

\* Password: (required)

← Enter your password here

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

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www.cra.gc.ca

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Welcome page >

Represent a Client

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**Welcome new user**

**Register with Represent a Client**

Logout

Help with this page

To use this service, you must first register as a representative. You can:

- register your [business](#) as a representative (must be the business owner); or
- register [yourself](#) as a representative.

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Important Notices

You will have to agree to the Terms and Conditions.

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**Terms and conditions of use - Representative**

Logout

In consideration of the Canada Revenue Agency (CRA) giving you access to the Represent a Client service, you agree to the following terms and conditions of use.

1. You certify that all information provided by you relating to your registration as a third party is accurate and complete, and that you are not providing any false or misleading information.

any reliance upon the information available on Represent a Client, as it is not official CRA documentation

- any transfer of information to the CRA
- the non-acceptance of information provided through Represent a Client
- any restriction, delay, malfunction, or unavailability of the Represent a Client service

19. You agree that this online registration has the same affect and is equivalent to a transaction carried out in accordance with your handwritten and signed instructions.

By selecting "I agree" you indicate that you accept these terms and conditions of use.

I do not agree I agree



You will have to enter your name and telephone number.

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### Register yourself - Step 1 of 3

Enter the following information to create your representative identifier (RepID):

Logout  
Help with this page

First name - Required field

Last name - Required field

Initial

Telephone number (Do not include dashes)  
 -

Extension

Fax number (Do not include dashes)  
 -

Cancel Clear Continue

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

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### Register yourself - Step 2 of 3

Logout  
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You have entered the following information:

First name	He	
Last name	Re	
Initial		
Telephone number	70	
Extension		
Fax number		

To continue with this registration, you must agree that the above information is correct and that it will be displayed to anyone trying to authorize you. It will be displayed online or in [written correspondence](#) to your clients when they authorize you. Your name will also be displayed to any administrator associating your RepID to a business or GroupID.

If the information is **not** correct, select "Change" to make corrections.

Change I do not agree I agree

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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.

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**Represent a Client**  
Access an account  
Submit documents  
Review and update

**Quick Links**  
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**Register yourself - Step 3 of 3**

Your registration is complete. Your RepID is **TJ663QZ**.

**Logout**  
Help with this page

You can:

- give this RepID to any individual or business that wants to authorize you to access their account online;  
and/or
- give this RepID to an administrator to be associated to their business or GroupID. Once associated, you will be able to access the accounts of anyone who has authorized their business or GroupID.

Individual clients can authorize you online through My Account or by paper using Form T1013. Businesses can authorize you online through My Business Account or by paper using Form RC59. Online authorizations will give you immediate access while paper authorizations will only give you access after the form is processed.

[Welcome Page](#)

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