

Authorizing a CRA Representative



Why Authorize?



Authorizing us as your representative with the CRA will allow us to check the status of your returns, file amendments, check for missing tax slips, and handle any audit or review requests with ease.



Let's Make This EASY!



Personal Authorization

For personal authorization there are two methods.

- 1) You provide us with your personal information and we create an Authorization Form that you would sign.
- 2) You log in to your My Account with CRA and add us as an authorized representative. This guide outlines how to do this.



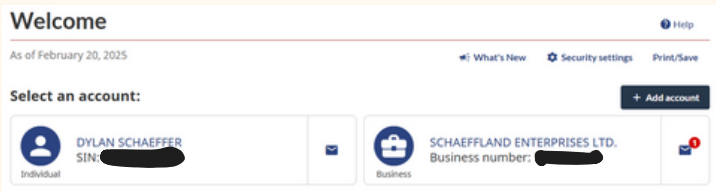
Business Authorization

Businesses can no longer opt to sign the Authorization Form and must instead authorize us through the CRA My Account.

If you do not have a My Account set up – please contact us or see our [“Setting Up CRA My Account”](#) guide to get started.

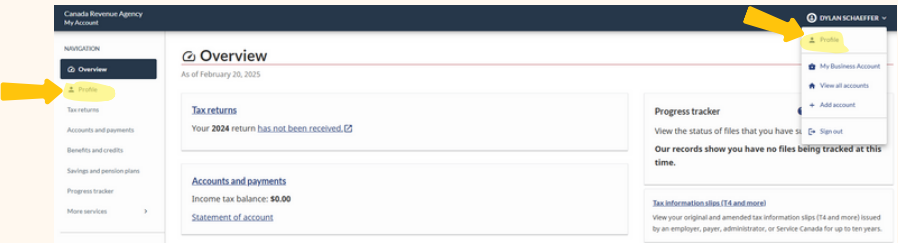
Personal

01 Log In To Your CRA Account



If you have a business your log in screen will ask you to select which account you would like to view, personal or business. If you do not have a business you should be taken to the next screen.

02 Click on the “Profile” option



There are two places you can access the Profile option from your desktop computer. Both will take you to the correct area.

03

Click “Add” at the Authorized Representative(s) Box

Profile

As of February 20, 2025

Print/Save

Contact information

Mailing address

Home address

Home phone number

Direct deposit

Banking Information

Privacy Notice

Marital status

Common-law with CAITLYN

Child information

(for benefits and credits only)

Language of correspondence

English

Authorized representative(s)

+ Add

In this box you will be able to see all your existing authorized representatives. If there are any you wish to remove you can select to delete them as well.

04

Click “Start”

Authorize a representative

Help

1 Before you begin

This authorization allows your representative to deal with the Canada Revenue Agency by internet, by telephone, by fax, in person or in writing.

Your representative will have access to all tax years as our online service does not yet have a year-specific option.

Start

1 Enter representative information

2 Select authorization details

3 Review and confirm

05

Enter “710662735” in the search box to find HPS.

1

Enter representative information

Fields marked with an asterisk (*) are required.

To authorize a representative to deal with the CRA on your behalf enter:

• **Representative identifier (RepID):** It is a 7-character alphanumeric code

• **Group identifier(GroupID):** It is a 6-character alphanumeric code, beginning with a G

• **Business number (BN) of a business:** It is a 9-digit identification number, if you enter a BN, you are authorizing CRA to deal with anyone from that business.

* RepID, GroupID or BN

710662735

Search

The following representative has been identified:

Representative information

Name:

2779265 ONTARIO INC.

BN:

710662735

Phone number:

9059621845

Fax number:

Back

Next

Our legal company name is 2779265 Ontario Inc.
If this what shows up, you found us!

06

Select Access - Level 2 & Yes to Online

Level 2 - allows us to handle any amendments, reviews, or audits on your behalf.

Level 1 - only allows us to view your tax slips

2

Select authorization details

Fields marked with an asterisk (*) are required.

* Authorization level

☐ Level 1 - Allow your representative access to information only.

☒ Level 2 - Allow your representative access to information and to make certain account changes.

> Level 1

< Level 2

Level 2 means that CRA may disclose the information listed in level 1 to your representative, they may also ask for changes to your account. Such changes include:

• adjustments to income, deductions, and non-refundable tax credits;

• accounting transfers.

* Online access

Online access allows a representative to deal with the Canada Revenue Agency by internet, by telephone, by fax, in person or in writing.

☒ Yes

☐ No

* Expiry date

YYYY - MM - DD

☒ Does not expire

Back

Next

Only set an expiry date if we are working together on a short term project. Otherwise you will be required to do this again in the future.

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06

07

Review - Make Sure It Looks Like This & Click “Submit”

Review and confirm

Fields marked with an asterisk (*) are required.

The following representative will be authorized:

Representative information

Name:

2779265 ONTARIO INC.

BN:

710662735

Phone number:

9059621845

Fax number:

Representative authorization

Online access:

Yes

Authorization level:

2

Expiry date:

Does not expire

Confirmation

☒ I confirm that the CRA may deal directly with the above named representative for the specified level of authorization. I acknowledge that these activities may occur without the CRA advising me.

Back

Submit

08

Successful Authorization

Make sure to let us know in a quick email/text/ call.

We do not receive notifications when we are added as a representative.

Authorize a representative - Confirmation

As of February 20, 2025

Print/Save

Success

You have successfully authorized a new representative: 2779265 ONTARIO INC.

You have authorized the following representative:

Representative Information

Name:

2779265 ONTARIO INC.

BN:

710662735

Phone number:

9059621845

Fax number:

Representative authorization

Online access:

Yes

Authorization level:

2

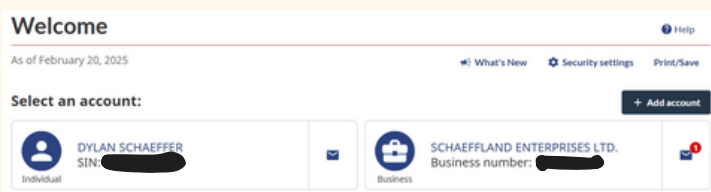
Expiry date:

Does not expire

Return to Authorize representatives

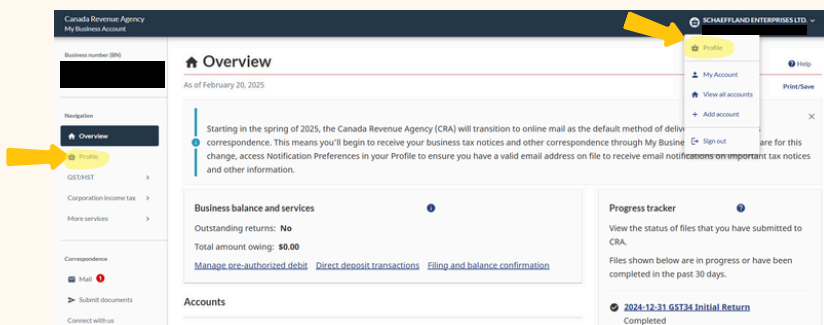
Business

01 Log In To Your CRA Account



If you have multiple businesses they should all be listed here. Select the business you would like to add the authorization to.

02 Click on the “Profile” option



There are two places you can access the Profile option from your desktop computer. Both will take you to the correct area.

03

Click “Add” at the Authorized Representative(s) Box

Profile for SCHAEFFLAND ENTERPRISES LTD.

As of February 20, 2025

Print/Save

Addresses

GST/HST - RT0001

Mailing address

[REDACTED]

Corporate income tax - RC0001

Mailing address

[REDACTED]

[Manage addresses](#)

Operating names

There are no operating names on file for this business.

[Manage operating names](#)

Phone numbers

[REDACTED]

[Manage phone numbers](#)

Direct deposit

[Banking Information Privacy Notice](#) ⓘ

[REDACTED]

Notification preferences

Add or remove email address(es) to receive notifications when eligible correspondence is available to view in My Business Account or important changes are made on your account.

[Manage notification preferences](#)

Authorized representatives

+ Add

In this box you will be able to see all your existing authorized representatives. If there are any you wish to remove you can select to delete them as well.

04

Click “Start”

Authorize a representative

1

Before you begin

This authorization allows your representative to deal with the Canada Revenue Agency by internet, by telephone, by fax, in person or in writing.

Your representative will have access to all tax years as our online service does not yet have a year-specific option.

Start

2

Enter representative information

3

Select areas for authorization

4

Select accounts for authorization

5

Select authorization details

05

Enter “710662735” in the search box to find HPS.

1

Enter representative information

Fields marked with an asterisk (*) are required.

To authorize a representative to deal with the CRA on your behalf enter:

• **Representative identifier (RepID):** It is a 7-character alphanumeric code

• **Group identifier(GroupID):** It is a 6-character alphanumeric code, beginning with a G

• **Business number (BN) of a business:** It is a 9-digit identification number, if you enter a BN, you are authorizing CRA to deal with anyone from that business.

* RepID, GroupID or BN

710662735

Search

The following representative has been identified:

Representative information

Name:

2779265 ONTARIO INC.

BN:

710662735

Phone number:

905-962-1845

Back

Next

Our legal company name is 2779265 Ontario Inc.
If this what shows up, you found us!

06

Select Areas for Authorization

2

Select areas for authorization

Fields marked with an asterisk (*) are required.

* Scope of authorization

Select what kind of access you wish to grant

All accounts

Includes all current and any future accounts

Specific accounts

Choose from current accounts

Back

Next

Typically we have you select “all accounts” if you are coming on as a
bookkeeping or corporate tax client.

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10

07 Select Access - Level 2

Level 2 - allows us to handle any amendments, reviews, or audits on your behalf.

Level 1 - only allows us to view your account

Select authorization details

Fields marked with an asterisk (*) are required.

* Authorization level

☐ Level 1 - Allow your representative access to information only.

☒ Level 2 - Allow your representative access to information and to make certain account changes.

> Level 1

▼ Level 2

Level 2 means that the CRA may disclose information about and accept changes to the account(s).

* Expiry date

YYYY - MM - DD

☒ Does not expire

Back

Next

Only set an expiry date if we are working together on a short term project. Otherwise you will be required to do this again in the future.

08 Review - Make Sure It Looks Like This & Click “Submit”

4 Review and confirm

Fields marked with an asterisk (*) are required.

The following representative will be authorized:

Representative information

Name:

2779265 ONTARIO INC.

BN:

710662735

Phone number:

905-962-1845

Representative authorization

Program account

Authorization level

Expiry date

All accounts

2

Does not expire

1 to 1 of 1

<

>

* Confirmation

☒ I confirm that the CRA may deal directly with the above named representative for the specified level of authorization. I acknowledge that these activities may occur without the CRA advising me.

Back

Submit

09

Successful Authorization

Authorize a representative - Confirmation

As of February 20, 2025

Print/Save

Success

You have successfully **authorized** a new representative: **2779265 ONTARIO INC.**

You have authorized the following representative:

Representative information

Name:

2779265 ONTARIO INC.

BN:

710662735

Phone number:

905-962-1845

Representative authorization

Program account	Online access	Authorization level	Expiry Date
All accounts	Yes	02	Does not expire

1 to 1 of 1

Return to Authorize representatives

Make sure to let us know in a quick email/ text/ call.

We do not receive notifications when we are added as a representative.

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Hoffman Professional Services

Check Out Our Other Guides

At the time of publication these other guides may not yet be published. We are launching a series of Guide Books. Feel free to reach out to us to request any Guide Books you would love to see published in the future



Setting Up A CRA My Account



Income Tax Preparation - What You Need To Know



Business On-Boarding Guide



Starting a Business in Ontario



Bookkeeping Basics & Free Tracking Spreadsheet

Hoffman Professional Services

Contact Information

Where big firm expertise meets small firm customer service.

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