ValueNode
Chartered Professional Accountants

# Authorizing a Representative via CRA My Account or My Business Account

**To get started, visit the [My CRA Account] page on the CRA's website and sign in using your account credentials.**

## For CRA My Business Account

1. Select your business account.
2. Once logged in, find and click on "**Profile**" in the navigation menu on the left side.
3. Scroll down to find "**Authorized representatives**", then click on "**+Add**".
4. You will be prompted to enter your representative's RepID, GroupID, or Business Number.
5. Set Authorization Level and Expiry Date:
   - **Level 1 (View only):** The representative can view your account information but cannot make changes.
   - **Level 2 (View and modify):** The representative can view your information and make changes to your account (e.g., file a return, update information).
   - You can also set an **expiry date** for the authorization. If you don't, it will remain active until you or your representative cancels it.
6. Once set, you need to confirm the details are correct and submit the authorization. Your representative will then have immediate access.

The process for authorizing a representative for your personal CRA account is nearly identical. Simply log in to your **CRA My Account** instead, and you will find the same "**Profile**" and "**Authorized representatives**" options to complete the steps.