



# The CRA Really, Really, Really Wants You to Connect Online

January 18, 2023

## Some History

Over the last couple of years, the Canada Revenue Agency has made it increasingly clear that they don't really want to deal with you and your business unless you first connect with them using My Account and My Business Account. This is especially true if you want to authorize your accountant or any other person as your representative to deal with the CRA on your behalf.

Providing your tax preparer/advisor with online access to your accounts allows them to efficiently and effectively obtain information held by the CRA that they need to prepare your returns and/or provide informed advice. Without that access, the process can be cumbersome and time-consuming.

In years gone by, your representative could be authorized for all types of access to your CRA accounts by mailing or faxing a signed form to the CRA. After an indeterminate waiting period, your representative could learn that they were authorized by trying to call CRA on your behalf or by successfully accessing your accounts online using Represent a Client.

More recently, tax preparers who use authorized tax return preparation software could obtain your signature on an authorization form, then electronically file an authorization request and immediately obtain the type of authorization you had approved. CRA trusted that preparers who had qualified for a filer identification number would value that privilege enough that they would not abuse the system by filing for authorization without first obtaining written approval from the affected taxpayer.

Things started to change after a security breach a little over 3 years ago. First, the CRA eliminated the ability for authorized representatives to make certain changes on behalf of their clients, like updating addresses. More recently, they have made it harder for a representative to become authorized, first for individual taxpayers and more recently for corporations.

## Current Situation

The result of the changes is that now, if you want your representative to have online access to your account information, you must be registered for CRA's My Account (for individuals) and for My Business Account (for corporations and for all payroll and HST accounts). CRA will not grant online access to your representative unless you sign in to My Account or My Business Account to confirm the request for authorization that your representative has filed, even if you have already signed the authorization form. You can also authorize a representative directly in My Account or My Business Account if the representative has given you their Business Number or RepID number.

To be clear, you can still authorize a representative to deal with the CRA on your behalf by telephone, fax, mail and in person by completing and mailing in a signed form AUT-01. This degree of authorization is highly inefficient given long telephone wait times and that, if documents are to be provided to your representative by CRA, they will be mailed to you and not directly to your representative. "By mail" means that CRA will deal with a letter sent to them by your representative, not that they will mail anything directly to them.

# The CRA Really, Really, Really Wants You to Connect Online

---

## Benefits to Authorizing Online Access

Online access allows your representative to obtain copies of notices and letters that have been sent to you, to immediately see whether payments have been received by the CRA and applied to the proper accounts, to transfer amounts between years and program accounts for businesses, to see details of assessments and reassessments, and to download reports that would otherwise have to be delivered by mail.

The bottom line is this: If you want your tax preparer/advisor to be able to represent you efficiently and effectively using the tools available online, you now have no choice but to register for, and use, CRA's My Account and My Business Account services.

*If you have any questions, please feel free to contact us at (905) 549-8463*