



CRA INCOME TAX AUTHORIZATION PROCEDURE

Provided By A-1 Bookkeeping Services Inc.

For our firm to complete your personal income tax return, we must have authorization on your CRA file. If we have completed your income tax return in the past then authorization already exists, providing you have not removed our firm from the authorized parties list with the CRA.

If you are new to our firm or a past client who has since removed our firm from your list of authorized parties, then this procedure is for you. The same process is in place no matter which 3rd party completes your tax return.

Use **1** of the following 2 methods, these procedures must be completed on everyone's file being authorized, if authorization is being done for 2 people, then each of you must follow these procedures.

Method 1 – Access to your CRA My Account (Recommended)

This method is recommended because it's quick, easy and we gain immediate access to your CRA file.

If you have a CRA My Account, meaning you already have log-in credentials with the CRA to access your tax file, just follow the procedure exactly as outlined. **Our firm does not troubleshoot, manage or provide technical support for the CRA website**, call the CRA directly at 1-800-959-8281.

If you don't have a CRA My Account and wish to use this method, follow step 1 and select "Register for a CRA account" option instead of logging in. Signing up for an account can take time due to the CRA processes.

- A. Log into your CRA My Account - www.cra.gc.ca – Click on the "Sign in to a CRA account" button.
- B. Select your sign in method, either with a sign-in partner or using your CRA login credentials.
- C. Once logged into the CRA My Account, click on your name at the top right of the page.
- D. Choose <Profile> from the drop-down menu.
- E. Scroll down to the "Authorized representative(s) section and click the <+Add> link.
- F. Select the <Start> button. Step 1 - enter our firm's business number in the box – **866980600** – Select the "Search" button, our firm's name and details should appear, select the <Next> button.
- G. Step 2 – In the "Select authorization details" section **choose <Level 2>**, then under "Online access" **choose <Yes>**, under the "Expiry date" **add a checkmark in the box** that states <Does not expire>, click the "Next" button.
- H. Step 3 – Add a checkmark in the box and select the <Submit> button.

If you followed Method 1 and gave our firm access to your CRA My Account, please let us know either via phone (506) 693-0123 or email admin@a-1bookkeeping.com. We will then verify if we have access. If you run into any issues with the authorization, call the CRA at the number listed at the beginning of Method 1.

Method 2 – Previous Year's Notice of Assessment (NOA)

As an alternative to method 1, this 2nd method is not as efficient and can delay accessing your file for a few days or longer due to the CRA authorization processes.

If you have your most recent Notice of Assessment (NOA) from the last tax return filed with the CRA, you can provide that document along with your tax slips. **It must be the most recent NOA**, for example, if you are looking to have your 2025 tax return completed by our firm, you must provide your 2024 NOA, not any previous year. The rule applies to any year being processed, you must provide the immediate previous year if following Method 2.

This usually gives us sufficient detail to request that the CRA authorize our firm on your tax file.

Missing Your NOA?

If you do not have your previous year's NOA, you will need to call the CRA at the number at the beginning of Method 1 to request a copy.

Before you call, you will need a copy of last year's tax return processed, only the person requesting a copy of the NOA can talk to the CRA or another party already authorized on your file. The CRA will use your last tax return to confirm who you are. If you don't have a copy of your tax return either, you have hit a roadblock that will be difficult to resolve, you will need to discuss this with the CRA.

The CRA will not provide the details you require over the phone, instead they will mail you a copy of your NOA. The CRA requires upwards of 10 business days for you to receive your NOA, but this is just their best guess.

Questions

Should you have questions about your tax return being processed or the step procedure, please contact us, we'll do what we can to assist, but keep in mind, if you are having log-in credential issues or other website difficulties, please call the CRA.