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# Confirm my representative's authorization request

Confirm my representative is a 2-step verification process that allows you to easily and securely control who has access and what level of access your representative has to your personal and tax information. As an individual taxpayer or a business owner, you can confirm certain authorization requests submitted by your representative. You can do this easily and securely using the Confirm my representative service in CRA's My Account or My Business Account.

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## If you are an Individual

The Confirm my Representative service allows you to verify all new authorization requests submitted by representatives through Represent a Client, including:

- authorizing a new representative on your account
- accepting requests for changes to access level of existing representatives

Representatives who use certified tax software (EFILE) for authorization requests for individuals **are not** impacted.

## How to access Confirm my Representative in My Account

You must be registered for CRA's My Account to use the Confirm my Representative service. If you already have access to My Account, you can turn on email notifications to get messages when a new authorization request is submitted by your representative. You can access your authorization requests in the "Authorized Representatives" section in My Account.

If you do not have access, you can register for My Account.

## Confirming or denying authorization requests

If a representative submits an authorization request, your information will remain protected until you confirm or deny the pending authorization.

You need to confirm or deny an authorization request **within 10 business days** in My Account or the request will be cancelled. If you still want to authorize a representative after this time period, you must ask your representative to submit a new request.

### Authorize your representative using details from a notice of assessment

You can also choose to authorize your representative using your information from a previous notice of assessment. If you choose this option:

1. If you haven't already done so, you must provide your representative with information from a notice of assessment that was sent to you at least 6 months ago

2. Your representative must provide this information when they submit their initial authorization request

Even with this information provided, the CRA may still contact you to verify your representative's authorization request. Your representative's request for authorization will generally be processed within 5 days.

# If you are a Business owner

Your representative can submit authorization requests using Represent a Client or using their certified tax software (EFILE). You must use the Confirm my Representative service in My Business Account to confirm or deny these requests.

## How to access Confirm my Representative in My Business Account

You must be registered for My Business Account to use the Confirm my Representative service. If you have an account, you can access your authorization requests in the "Authorized Representatives" section in My Business Account.

### If you do not have an account

If you are already registered for My Account, as a business owner you will also have access to My Business Account. Simply use your existing CRA user ID and password to sign in to My Business Account.

If you do not have access, you need to register for My Business Account.

Once you have signed in to My Business Account, you will need to add your business number to your account. You can only complete this if your name and social insurance number match the information the CRA has on file for your business. **If you get an error message at this step, you will need to contact the CRA to update your records**.

## Confirming or denying authorization requests

You must confirm or deny an authorization request within **10 business days**. If no action is taken within this period, the request will be cancelled. Your representative will need to submit a new authorization request if it is still needed.

### Designating a delegated authority to confirm requests

Business owners or directors can designate a delegated authority within their organization, such as a financial officer, to deal with tax matters on their behalf. To do this, the owner or director needs to sign in to My Business Account at least once to authorize this person as a level 3 delegated authority. This level 3 representative will then be able to confirm or deny new authorization requests for other representatives. To learn more about the levels of authorization, go to Level of access you can give.

## Receive notifications for new authorization requests

You can register for email notifications in My Business Account. This service allows the CRA to send you an email when a new representative requests access to your tax information. When you receive an email notification, you can sign in to My Business Account to confirm or deny the authorization request.

## Exclusions to the Confirm my Representative service

Confirm my Representative is not available for businesses where all of the owners or directors have been identified to the CRA as being non-residents of Canada or if the authorization request is certified (signed) by a legal representative (such as an executor or a trustee) of the business. In these cases, the CRA may contact the business by telephone to verify a representative’s authorization request. It is very important to keep the residency status of a business owner up-to-date in the CRA’s records.

If you are unable to register for My Business Account, you may contact Business Enquiries at 1-800-959-5525 for more information.

# Relevant information for your representatives

The Confirm my Representative process will apply to all new authorization requests that your representative submits using Represent a Client and for requests they submit through the Business Consent Service in certified tax software (EFILE).

## Submitting authorization requests

Once you have registered for My Account or My Business account and have enabled email notifications, your representative can submit their authorization request through Represent a Client or using the Business Consent Service in EFILE.

If you are an individual, you can choose to authorize your representative for access to your account by providing additional information instead of using the “Confirm my Representative” service. In this case, your representative will need to have your information from a notice of assessment that was issued to you at least six months earlier and will need to submit this information with the request. If this option is chosen, the request for authorization will generally be processed within 5 days.

## After submitting the authorization request

Your representative can view the status of their authorization requests in Represent a Client. Authorization requests must be confirmed or denied **within 10 business days**, or they will be cancelled and your representative will need to submit a new one. If they submit a new request before the original request was confirmed or denied, it will cancel the original and restart the clock. Once a request is confirmed, your representative will be granted access within one business day.

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