

CRA authorization guide

Give Elena permission to access the CRA information needed for your agreed tax work. Choose the instructions for your account. Complete authorization inside the CRA service, or return the specific signature page Elena provides.

Representative	Elena Arsen
RepID	MS7D862
Access	Level 2 for agreed work requiring information and permitted account changes; discuss Level 1 if you want information-only access.
Online access	Choose Yes when online access is requested.
Expiry	Choose an expiry date, or Does not expire if you want continuing access. You can cancel later.

1. Personal taxes: add Elena in My Account

Use your own Individual account. Each spouse or partner authorizes access separately.

1. Open the official CRA sign-in page and sign in using your usual method.
2. Choose your **Individual account**, then **Profile**.
3. In **Authorized representative(s)**, choose **Add**. Read the introductory information and choose **Start**.
4. Enter RepID **MS7D862**, choose **Search**, and check that the result is **Elena Arsen**. Continue only if the details match.
5. Choose the agreed access level, **Yes** for online access, and your expiry preference. Continue to the review screen.
6. Check the details, read and accept the authorization confirmation, and choose **Submit**. Wait for the success message.
7. Tell Elena you have completed authorization. Keep the confirmation for your records; a general message is enough.

[CRA: personal authorization walkthrough](#)

Requests and alternatives

2. If Elena has already sent a request

A request is not active just because Elena submitted it. For the My Account confirmation method, approve it within **10 business days** or it is cancelled.

1. Sign in directly to CRA and open **Individual account / Profile**.
2. Under **Authorized representative(s)**, open **Confirm pending authorizations**.
3. Select **Elena Arsen**. Review the RepID, access level and expiry date.
4. Choose **Confirm authorization**, complete the confirmation and submit.

Do not wait for an email link. CRA email notifications are optional. If the request is missing or expired, contact Elena so she can check or submit a new request.

[CRA: representative request process](#) | [CRA: pending requests and alternative processes](#)

3. Personal taxes: use an older assessment

If My Account is unavailable, ask Elena about CRA's alternative process. It uses a notice of assessment sent **at least six months ago**, not one issued within the last six months.

1. Send the assessment through your private client upload link. Keep other assessments or reassessments for that year available.
2. Elena checks the tax year and line information CRA asks for in the authorization request.
3. Review and sign the request-specific certification page Elena supplies. Return it through the agreed secure channel.
4. Elena uploads that signed page in Represent a Client. Do not mail or fax that certification page to CRA.

CRA generally processes this route immediately, but may contact you to verify the request. Elena will confirm when access is active.

2025 return not finished? An older assessment may qualify if it meets CRA's date and information requirements. You do not necessarily need a 2025 assessment.

[CRA: pending requests and alternative processes](#) | [CRA: personal authorization walkthrough](#)

No qualifying assessment or online access?

Contact Elena. Depending on the request, CRA may offer a signed-consent route in Represent a Client and may call you to verify it. Elena will follow the options CRA presents for your file; access is not guaranteed merely by signing a generic letter.

[CRA: ways to give authorization](#)

Business access and registration

4. Business taxes: My Business Account

Use the business account for GST/HST, payroll or corporate tax access. Personal authorization does not automatically cover your business program accounts.

1. Sign in to CRA and open the correct **Business account**. Check your business name and business number.
2. Open **Profile / Authorized representatives / Add**. Read the introductory information and select **Start**. If needed, first open **Manage authorized representatives**.
3. Enter RepID **MS7D862** and verify **Elena Arsen**.
4. Choose the scope agreed with Elena: a particular program or account, or the entire business number only when that wider access is needed.
5. Select the agreed access level, online access if prompted, and expiry preference. Review all details and submit.
6. Keep the success confirmation and tell Elena which accounts you authorized.

Common program codes: RT = GST/HST; RP = payroll; RC = corporation income tax. Level 1 is view-only; Level 2 permits viewing and updates. Level 3 can also authorize other representatives and is not requested for routine tax preparation.

Pending business request: In Profile, use Manage authorized representatives and Confirm pending authorizations (sometimes shown as Confirm pending requests). Select Elena's request and confirm within 10 business days.

Cannot access the business account? Contact Elena. Certain sole proprietors may qualify for an alternative where their SIN is linked to the business and Elena is already authorized personally. This is not a blanket exemption for corporations.

[CRA: ways to give authorization](#) | [CRA: business access and program accounts](#) | [CRA: pending requests and alternative processes](#)

5. Register for a CRA account

Already registered? Use your existing sign-in. Otherwise, open the official CRA registration instructions.

1. Have your date of birth, SIN (or accepted alternative), and figures from your latest assessed return within the last two years ready. Use the figures originally filed when CRA asks for return amounts.
2. Choose a CRA user ID/password or an available Sign-In Partner. Eligible Alberta and British Columbia residents also have provincial options.
3. Set up multi-factor authentication and follow CRA's identity checks.
4. Use the document-verification option if eligible, or request a mailed security code. Complete verification, then follow the authorization steps above.

Never filed, or no return in the last two years? The usual CRA user ID/Sign-In Partner registration requires a qualifying filed return. Provincial-partner exceptions exist in Alberta and British Columbia. Contact Elena about the available authorization route rather than assuming all authorization is impossible.

[CRA: registration and first-time filers](#)

Your choices and useful links

6. Change or cancel access

You control the access level and expiry. To change a current authorization, open Profile in the relevant CRA account and select the representative to review the available options.

1. For personal accounts, select Elena under Authorized representative(s), then **Delete** within Representative authorization and complete the confirmation.
2. For business accounts, select the representative and relevant authorization(s), then **delete representative** and confirm.
3. Online removal cancels access immediately. If you cannot do it online, use CRA's cancellation instructions for telephone or mail options.

[CRA: cancel representative access](#)

Forms, privacy and special situations

Need a paper authorization? The official AUT-01 form is for **offline access only** (phone, mail, fax or in person). It does not give online access. Ask Elena before using it so the method matches the work.

Online signature pages: Elena supplies the CRA page required for your particular request. This guide is an instruction sheet, not a consent form to sign.

Estates and trusts: If someone has passed away, or you act as a trustee or legal representative, contact Elena first. CRA may need legal documents and a different account or authorization process.

Keep sign-in details private: Never send CRA or banking passwords, one-time codes or security answers. Send SINS, assessments and signed pages through the private upload link supplied by Elena, not the public website inquiry form or ordinary email.

Separate approvals: CRA representative access, the engagement letter and approval to file a return serve different purposes. We obtain the required filing authorization separately.

Questions or an upload link? Contact elena@arsenaccounting.com or (647) 297-4126.

[CRA: official AUT-01 offline authorization form](#) | [CRA: representative request process](#) | [CRA: representing someone who has passed away](#)

Official links are clickable in this PDF. Start sign-in at canada.ca/cra-sign-in-services.

Instructions checked October 30, 2026. CRA wording and available options may change. Follow the current CRA prompts and contact Elena if the screens differ.