

Authorizing SB Partners LLP as an Authorized Representative

CRA My Business Account

CRA My Business Account is an online portal that allows business owners to interact with the Canada Revenue Agency across different business accounts. Get real-time information and make transactions that can be processed immediately. Services for business owners include; filing GST/HST (except for GST/HST accounts administered by Revenu Québec), payroll, and corporation income tax.

Authorized Representatives can access an account on behalf of business clients

Creating a CRA My Business Account:

Navigate to CRA's My Business Account online [My Business Account - Canada.ca](https://mybusinessaccount-canada.ca)

Here, you will have two options:

- Option 1 – Using one of our Sign-In Partners
- Option 2 – Using a CRA user ID and password

Option 1 is the easiest option using your online banking sign in details

For Option 2 instructions – see appendix A

Option 1 – Using one of our Sign-In Partners

Sign in or register with the same sign-in information you use for other online services (for example, online banking).

[Sign-In Partner](#)



















For the security of your CRA account, when you are on your Sign-In Partner website, [ensure it is your information](#) that is entered and not that of somebody else.

[▶ View list of Sign-In Partners](#)

Select Sign-In Partner and you will be taken to a screen where you will select your online banking provider - this is your personal bank account which is used by CRA to verify your identity.

Select a Sign-in Partner

By using the Interac® sign-in service to select a Sign-In Partner, you are agreeing to the Terms and Conditions and Privacy Notice of the Interac® sign-in service.


Once you select your online banking provider, you will be taken to a screen that looks like you are logging into your online bank account.

Once you login you will have to do the following:

- Enter your social insurance number.
- Enter your date of birth.
- Enter your current postal code.
- Enter an amount you entered on one of your income tax and benefit returns. Have a copy of your returns handy. The line amount requested will vary, it could be from the current tax year or the previous one. To register, a return for one of these two years must have been filed and assessed.

Once you have completed this information and click next, you will come to this screen which advises that your CRA security code will be mailed to the address you have on record with CRA and it should arrive in 5-10 days.

CRA security code notification

 If you need to update your address or direct deposit information with the CRA or if you would like to take advantage of the other services offered in My Business Account or other CRA Sign-in Services, you will need to enter a security code. If your mailing address changed, it is important that we have your new mailing address on file. You must [Contact us](#) to give us your new address before you continue with this process.

As a security measure we will mail your CRA security code to the address you have on record with the CRA. You should receive it within 5-10 days.

If you are blind or partially sighted, you can ask to receive your personal correspondence from the CRA in an [alternate format](#).

[Next](#) [Exit](#)

You will need to confirm your current postal code to continue:

Verification—current postal code or ZIP code

Once you have completed this process you should receive your CRA security code by mail within 5-10 days. We will mail it to the address we have on file for you.

If you are blind or partially sighted, you can ask to receive your personal correspondence from the CRA in an [alternate format](#).

*** Postal code/Zip code confirmation (required)**

- I confirm that _____ is my current postal code or ZIP code.
- No, this is not my current postal code or ZIP code.

For more information on how your privacy is protected, refer to our [Personal Information Collection Statement](#).

[Next](#)

You will then need to set up/select your multi-factor authentication – telephone number and delivery method

- If you select "Text me", the passcode will be sent by Short Messaging Service (SMS) only once each time you select this delivery message. You will need to open the text message to read the passcode. If you select "Call me", the passcode will be verbally provided to you in an automated message. Once the passcode is sent it will expire in five minutes. Have your telephone handy.

Select next and you will get this screen where you will enter the passcode sent to the telephone number set up/selected

Multi-factor authentication—passcode entry

The CRA sent you a six digit one-time passcode by Text message to the following telephone number: *** - *** -
Enter the passcode below, it will expire after five minutes.

One-time passcode (required) ⓘ

If you did not receive the one-time passcode, you may request a new one by selecting the link below. The CRA will resend a new passcode to the telephone number you previously selected. This can take a few minutes.

[Request a new one-time passcode](#) ⓘ

If you added more than one telephone number you can also send the one-time passcode to a different number by selecting the link below. You can also change the delivery method by selecting this link.

[Send to a different telephone number or change delivery method](#)

One-time passcode preference (required)

- Ask me to input a one-time passcode each time I sign in using this device (recommended if you are using a public or shared device).
- Do not ask me to input a one-time passcode for the next eight hours when I sign in using this device.

You will then get this screen, select next:

CRA security code notification—confirmation

As a security measure we will mail your CRA security code to your address on record with the CRA. You should receive it within 5-10 days.

If you are blind or partially sighted, you can ask to receive your personal correspondence from the CRA in an [alternate format](#).

Next

You will then get a list of terms and conditions to read and agree to at the bottom.

Once you select “I agree”, you will come to the screen where you enter your Business Number:

Manage profile – add BN to profile

*** Business number (9 digits) (required)**

Submit

Screen ID: MBA-20

Date modified: 2022-10-17

To note, you must be listed as a partner, director or officer with CRA to access My Business Account for the business number you enter above. CRA connects you SIN with the SIN's on file for the business number entered above.

When you receive your CRA security code in the mail, log back in and you will be prompted to enter it

CRA security code entry

Your CRA security code was issued on **April 21 2023**

If you requested this security code by mail, allow up to 10 days to receive it.

* **CRA security code (required)** ⓘ

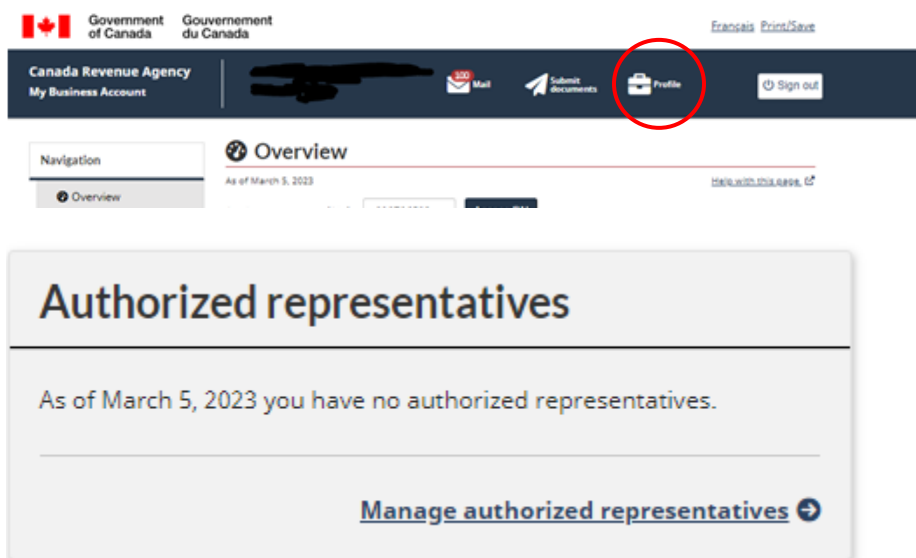
[Lost or did not receive your CRA security code?](#)

For more information on how your privacy is protected, refer to our [Personal Information Collection Statement](#).

Next

Exit

Once you are in the account, click on Profile in the top right corner (to the left of the Sign out button) and scroll down to Authorized Representatives and click on the link "Manage authorized representatives"



The screenshot shows the CRA My Business Account interface. At the top, there is a navigation bar with the Government of Canada logo, the user's name, and a Profile icon circled in red. Below the navigation bar, there is a "Navigation" menu with "Overview" selected. The main content area displays "Authorized representatives" and states "As of March 5, 2023 you have no authorized representatives." A button labeled "Manage authorized representatives" with a right-pointing arrow is visible at the bottom of the content area.

Click on "Authorize a representative"

Authorize a new representative

To authorize a representative select the button below.

- To authorize an employee, an individual, or an individual of a firm, you need the representative identification number (RepID) they obtained through "Represent a Client" on the Canada Revenue Agency (CRA) Web site.
- To authorize a firm, you need their Business Number (BN), which they must have registered through "Represent a Client" on the CRA Web site.
- To authorize a group, you need the group identification number (GroupID) they obtained through "Represent a Client" on the CRA Web site.

Authorize a representative

Confirm pending authorizations

No representatives are currently authorized to deal with the Canada Revenue Agency (CRA) on behalf of the business.

In the box labelled RepID, GroupID or BN, type in the following number: 123888745 and hit next to add SB Partners as an authorized representative:

You can authorize a representative to deal with the Canada Revenue Agency by internet, by telephone, in person, or in writing.

This representative will have access to all tax years since this online service does not give you the option to specify a year.

* RepID, GroupID, or BN (required) ?

Previous Next

On the next screen, select the following:

- Level of authorization for this representative - Update and view (Level 2)
- Expiry date - leave blank (to ensure continuity of service, authorizations can be cancelled at any point)
- Accounts - All accounts

Click Next

Government of Canada / Gouvernement du Canada | Français Print/Save

Canada Revenue Agency | Sign out

My Business Account

Authorize representative – Enter information

Authorized representatives

Authorize a representative

View transactions

Authorize representative – Enter information

Business number

Business name

Firm BN 123888745

Firm name SB Partners LLP

* Level of authorization for this representative (required) ?

View only (level 1)

Update and view (level 2)

Expiry date
(If no expiry date is selected, the authorization will be valid indefinitely.)

mm/dd/yyyy

* Accounts this representative will be authorized to access (select one or more) (required)

Select	Accounts
<input checked="" type="checkbox"/>	All accounts
<input type="checkbox"/>	All RC Corporation Income Tax accounts
<input type="checkbox"/>	RC0001
<input type="checkbox"/>	All RP Payroll Deductions accounts
<input type="checkbox"/>	RP0001
<input type="checkbox"/>	All RT GST/Harmonized Sales Tax accounts
<input type="checkbox"/>	RT0001
<input type="checkbox"/>	All RZ Information Returns accounts
<input type="checkbox"/>	RZ0001

Previous Next

Review authorized representative information and click on Confirmation and then Submit

My Business Account

Review authorized representative

Authorized representatives

Authorize a representative

View transactions

Review authorized representative

Business number

Business name

Firm BN 123888745

Firm name SB Partners LLP

Authorization information

Program account(s)	Level of authorization	Tax year(s)	Expiry date
All accounts	Update and view (level 2)	All years	Does not expire

*** Confirmation (required)**

I confirm that the Canada Revenue Agency (CRA) can deal directly with this representative on my behalf.

[Previous](#) [Submit](#)

Done!

Appendix A

Option 2 – Using a CRA user ID and password

Sign in with your CRA user ID and password, or register.

[CRA sign in](#) [CRA register](#)

You will then be guided through a series of questions and prompted to enter the following to create your User ID and Password:

- Enter your social insurance number.
- Enter your date of birth.
- Enter your current postal code.
- Enter an amount you entered on one of your income tax and benefit returns. Have a copy of your returns handy. The line amount requested will vary, it could be from the current tax year or the previous one. To register, a return for one of these two years must have been filed and assessed.
- Your business telephone number.

You will then be prompted to create your security questions and answers. You can also decide if you want a persistent cookie added to your computer, so you can access CRA Login Services using that same computer later without being asked for more identification.

Next you will be prompted to enter your business number.

Once you have completed this process, CRA will provide a security code that will be mailed to the address you have on record with CRA and it should arrive in 5-10 days.

Note that the CRA security code has an indicated expiry date. Follow the provided instructions before the code expires, or you'll have to contact the CRA to have a new CRA security code issued to you.