

How to Authorize JE Tax & Bookkeeping (Julianna G Eriksson) as your Representative on CRA My Account

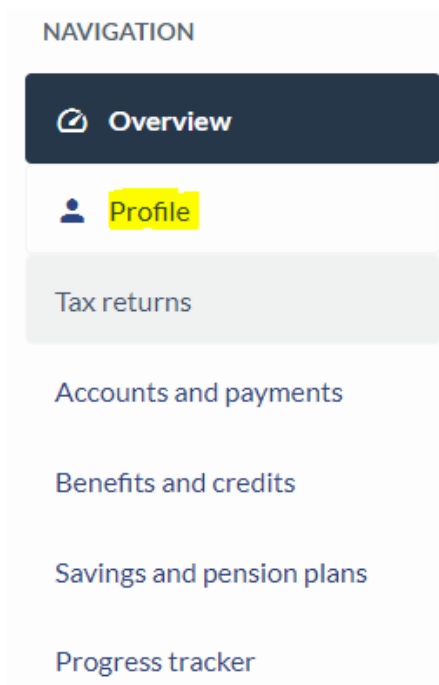
1. Login to your CRA Online Account: [CRA My Account Login](#)

Don't have a CRA My Account yet? Follow links for information:

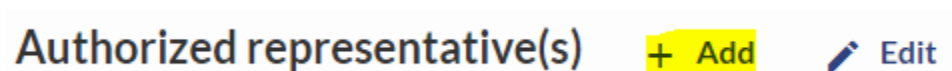
- [How to Register for My Account](#)
- [Registration process FAQ](#)

Can't get access right away? Contact [Julianna](#) for other Rep Authorization options.

2. On the main “Overview” page, on the left hand Navigation menu as seen below, click on “Profile”.



3. Once in your Profile, scroll down to view the “Authorized Representative(s)” section on the right side and select “Add”.



4. Click “Start”

Authorize a representative

[Help](#)

i Before you begin

This authorization allows your representative to deal with the CRA by internet, by telephone, in person, or in writing.

Your representative will have access to all tax years as our online service does not yet have a year-specific option.

Start

5. Enter REP ID: “X85KC25” in the required field and click “Search”.

1 Enter representative information

Fields marked with an asterisk (*) are required.

To authorize a representative to deal with the CRA on your behalf enter:

- the representative identifier (RepID); or
- the group identifier (GroupID); or
- the business number (BN) of a business. If you enter a BN, you are authorizing CRA to deal with anyone from that business.

* RepID, GroupID or BN

X85KC25  Search

6. Confirm the following information is displayed and then press “Next”.

The following representative has been identified:

JULIANNA G ERIKSSON

RepID: X85KC25

Phone number: 780-850-5841

Fax number:

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Next



7. Choose Authorization Level: “Level 2” , Online Access: “Yes,” leave the Expiry Date blank, and click “Next.”

Notes:

- You can choose Level 1 if you would prefer to only give information viewing permission without providing permission to make changes to your account on your behalf. Level 2 is helpful if you desire assistance in the event of a CRA review or audit of your tax return.
- You may also wish to set an expiry date, you will simply need to repeat this process if you choose to continue using *JE Tax & Bookkeeping's* preparation service after the set expiry date.

2 Enter representative authorization

Fields marked with an asterisk (*) are required.

* Authorization level ?

- ☐ Level 1 - Allow the CRA to disclose information to your representative about your account
- ☒ Level 2 - Allow the CRA to disclose information to your representative and make changes to your account

* Online access

- ☒ Yes
- ☐ No

Expiry date (optional)

If no expired date is selected, the authorization will be valid indefinitely

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Next



8. Review and confirm all information, check the required box, and click “Submit”

3 Review and submit

Fields marked with an asterisk (*) are required.

The following representative will be authorized:

Representative information

Name: JULIANNA G ERIKSSON

RepID: X85KC25

Phone number: 780-850-5841

Fax number:

Representative authorization

Authorization level: 2

Online access: Yes

Tax years: All

Expiry date: Does not expire

* Confirmation



I confirm that the CRA may deal directly with the above named representative for the specified level of authorization. I acknowledge that these activities may occur with CRA advising me.

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[Submit](#)



8. Once you receive the confirmation as seen below, you are done and ready to go! Thank you for completing this authorization – it will help *JE Tax & Bookkeeping* ensure accuracy on your tax return and assist you if any questions arise regarding your CRA account.

Authorize a representative - Confirmation

As of October 13, 2022

[Print/Save](#)



Success

You have successfully **authorized** a new representative: **JULIANNA G ERIKSSON**

You have authorized the following representative:

JULIANNA G ERIKSSON

RepID: X85KC25

Phone number: 780-850-5841

Fax number:

Authorization level: 2

Online access: Yes

Tax years: All

Expiry date: Does not expire

[Return to profile](#)

