

“My Account” & “Authorize a Representative” Registration Instructions

THIS IS A 2-STEP PROCESS:

*If you have a “My Account” registered, please skip to **STEP 2** of this email – **Authorize a Representative Step1: How to register for “My Account”.**

To get started, go to <https://www.canada.ca/en/revenue-agency/services/e-services/cra-login-services.html>

My Account for Individuals

Provide personal information:

- 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.
- Create a CRA user ID and password.
- 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 sign-in services using that same computer later without being asked for more identification.
- Enroll in mandatory multi-factor authentication by selecting your preferred method (telephone or passcode grid). For more information, see [multi-factor authentication](#).

After you complete step one of the registration process, you will have access to limited tax information on My Account. **A CRA security code will be mailed to you, which you should receive it in 5-10 days.** After receiving your security code, log in to our “My Account” and enter your CRA security code, you will have access to the full.

Enter the CRA security code

To access your account, return to <https://www.canada.ca/en/revenue-agency/services/e-services/e-services/individuals/account-individuals.html> & select "CRA sign in," and enter your CRA user ID and password. When prompted, enter your CRA security code.

Once you have access to your “My Account”, you can then authorize Matthew Perry Tax Prep

STEP 2: HOW TO “AUTHORIZE A REPRESENTATIVE”:

- Log online to your “My Account” at www.canada.ca
- **Select Option 2 - CRA Sign in**
- Terms and Conditions “may” appear – select 1 - **Agree**
- Left side of your My Account home page you will find “**Profile**”
- Access your “**Profile**” page and scroll down to “**Authorized Representatives**” •
Select “ **+ ADD** ”
- Select “**start**”
- ENTER **Matthew Perry Tax Prep Rep ID : YL5B3B3**
- Select “**next**”
- **Select Level 2 - if level selection “required**
- Select “**submit**”

Please let me know when you have completed your registration.

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Thank you for taking the time to set up your account.