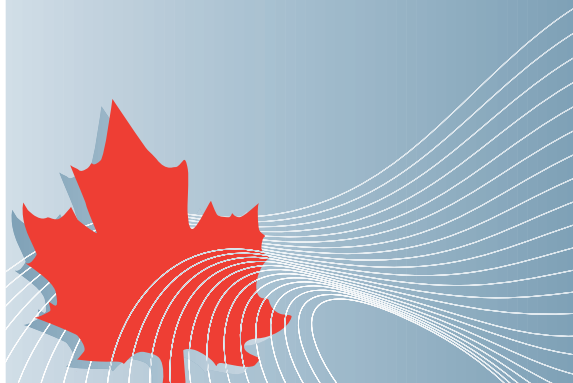


# Canada Revenue Agency Represent a client

For individuals and businesses

[www.cra.gc.ca/representatives](http://www.cra.gc.ca/representatives)



## What is Represent a client?

It's quick, easy, and secure. Represent a client is an online service that provides you with secure and controlled access to tax information on behalf of individuals and businesses.

## Who can use this service?

Any business or person that manages the tax affairs of individuals and/or businesses, including employees who manage the tax affairs of the business they work for, can use this service.

## What can a representative do?

### Access information on behalf of:

#### Individuals

- View client tax summaries
- View carry-over amounts
- View RRSP information
- View assessment details
- And much more

#### Businesses

- View account balances (GST, payroll, corporate)
- Transfer payments
- View/file returns
- View account transactions
- And much more

## How to use this service

### Step 1 – Select the Represent a client link from the CRA home page

- Already have an epass user ID and password? – Select “Log in”
- Need an epass user ID and password? – Select “Register”

### Step 2 – Register as a representative

- Register your tax services business using your Business Number (BN)
- Register yourself and receive a representative identifier (RepID)

### Step 3 – Obtain authorization

Give your BN or RepID to individuals, businesses, or your employer so they can authorize you to access their tax information online.

### Step 4 – Act as a representative

After you are authorized, you can access information and services on behalf of individuals, businesses, or your employer.

## Learn more

For more information, go to [www.cra.gc.ca/representatives](http://www.cra.gc.ca/representatives).