# Register for a CRA account

#### 1. Gather your Documents:

When you register with a CRA user ID and password or a Sign-In Partner, you will need **ALL** of the following:

- ✓ Your Social Insurance Number (SIN)
- ✓ Your date of Birth
- ✓ Amounts you reported on your most recent tax return
  - o The return must be the most recent return
  - It has to have been filed and Assessed

For faster access to your CRA account, you will also need a mobile device with a working camera and ONE of the following pieces of identification:

- Your Canadian Passport
- Your Canadian Driver's License
- Your Provincial or Territorial photo ID card

Have all your documents ready as the registration process will time-out after 18 minutes of inactivity.

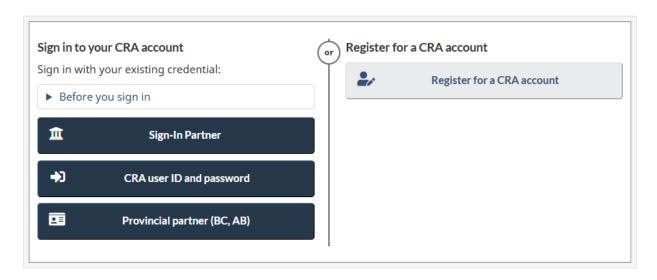
Access the Canada Revenue Agency (CRA) website using a mobile device, lap top, or desktop computer.

https://www.canada.ca/en/revenue-agency.html

Click on the green button "Sign in to a CRA account" to get started



### Click on the right button: Register for a CRA account



# 2. Choose a Sign-in option to register with:

The option you register with will be the same option you use each time you sign in. Make a selection to begin:



# 3. Verify your Identity:

You can use the document verification service to verify your identity immediately. Use a mobile device to take a real-time picture of yourself and an accepted identification document.

#### OR

A CRA security code will be sent to you by mail within 10 business days.

### 4. Enroll in multi-factor authentication (MFA)

With an authenticator app You can use a third-party authenticator app to generate your time-based one-time

passcode.

When prompted, use the app downloaded on your mobile or desktop device to either scan a QR code or manually enter the setup key provided by the CRA. The app can then be used to generate your one-time passcode.

or By phone

You will need to provide at least one cell or landline number so we can send you a one-time passcode by phone<sup>®</sup>. You must enter this number to access your CRA account.

or V

With a passcode grid

The system will generate a unique <u>passcode grid</u>® that you will need to save or print. You will use this grid every time you access your CRA account.

Your passcode grid will expire after 18 months. Make sure you sign in and generate a new one before the expiry date.

### 5. Complete your identity verification

Complete the verification option that you chose in step 2:

**The online document verification service:** Follow the instructions to complete this process on your mobile device.

#### OR

**CRA security code:** After you receive your CRA security code in the mail, sign in to your CRA account and enter your code before it expires.

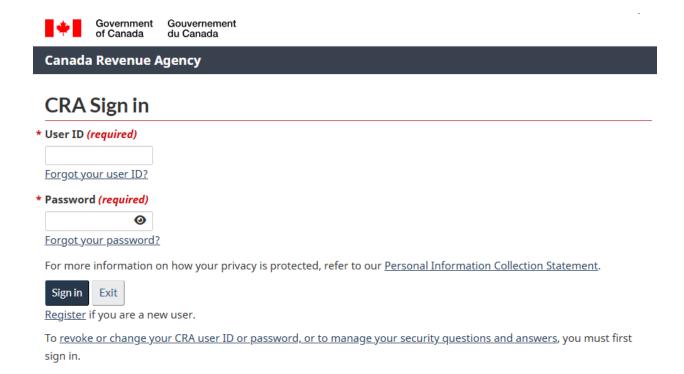
#### Recommendations:

- Keep your user ID and Password in a safe place, for easy retrieval.
- Keep the security questions and answers you provided for future reference if needed as this will assist with password recovery if forgotten.

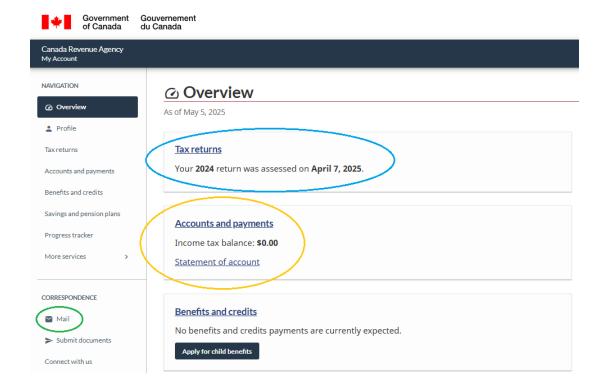
#### For guided instructions on the CRA website:

https://www.canada.ca/en/revenue-agency/services/e-services/cra-login-services/register-cra-sign-in-services.html

# Once you have successfully registered for a CRA Online account



Once you have logged in, your main page will look like the screenshot below:



# On this OVERVIEW page, you can access the following important links:

- Tax Returns: All filed tax returns going back 10 years
- **Accounts and Payments:** Tax balance if owing, you can click into this link to see the history of payments and refunds.
- Mail: Mail from CRA including Notice of Assessment, Reassessments, and other important tax communications. \*This is how CRA will communicate with you in 2025 and onward\*

# To update your contact information with CRA

It is important to keep your information up-to-date with CRA. Click on the **PROFILE** link to update your important information such as:

- ✓ Mailing Address
- ✓ Contact phone number
- ✓ Email address
- ✓ Marital Status
- ✓ Direct deposit information
- ✓ Child/Dependent information
- ✓ Language preference
- ✓ Authorized Representatives

**Authorized Representatives:** This is where it will list the accounting and tax firms and professionals that have authorization to access your CRA tax slips and file your taxes. Here you can add new authorized firms or professionals.

# **Clicking on SAVINGS AND PENSION PLANS**

This link will take you to the page that shows your RRSP deduction limit for the year, any unused contributions, and limits for accounts like TFSA, FHSA, HBP, LLP Etc.