

About This Guide

This guide walks you through two tasks: (1) setting up your personal CRA My Account, and (2) authorizing HW Partners to act as your representative so we can access your tax information and correspond with the CRA on your behalf.

What you'll need — A social insurance number (SIN), your date of birth, your current postal code, and details from a previous tax return or notice of assessment. You will also need a mobile device or email address for identity verification.

PART 1 | Set Up Your CRA My Account

1 Go to the CRA sign-in page

Visit canada.ca/cra-login and click Register under the CRA sign-in option.

2 Choose your sign-in method

Select Sign-In Partner to register using your online banking credentials (most major Canadian banks are supported), or choose CRA User ID and Password to create a new government login.

3 Verify your identity

You will be asked to provide your SIN, date of birth, and postal code. The CRA will then ask you to confirm details from a previous tax return or notice of assessment to confirm your identity.

4 Set up multi-factor authentication (MFA)

For added security, you will be prompted to set up MFA. You can use an authenticator app (recommended), receive a one-time code by email, or use a phone passcode grid. Complete the setup to proceed.

5 Access My Account

Once verified, you will land on the CRA Welcome page. Select your Individual account to access My Account, where you can view your tax information and manage your profile.

6 Enable email notifications (recommended)

In My Account, go to Profile and turn on email notifications. This ensures you are alerted when HW Partners submits an authorization request on your behalf.

PART 2 | Authorize HW Partners as Your Representative

HW Partners Business Number (BN): 862584489 — you will need this in Step 3 below.

1 Sign in to your CRA account

Go to canada.ca/cra-login and sign in using the method you registered with.

2 Go to your Profile

From the My Account Welcome page, select Profile from the left-side navigation menu.

3 Add HW Partners as a representative

In the Authorized representative(s) section, click + Add. Read the Before you begin information and select Start. Enter HW Partners' Business Number (BN): 862584489, click Search to confirm the details, then click Next.

4 Set the authorization level

Select Level 2 for online access, set an expiry date or leave blank, then click Next.

5 Review and submit

Review the details, check the confirmation box, and click Submit. HW Partners will be authorized immediately.

Important: If HW Partners submits an authorization request through Represent a Client, you must confirm it within 10 business days in My Account or the request will be cancelled.

Authorization Levels at a Glance

Level	Capabilities
1	View your tax information, notices of assessment, and benefit details (read-only).
2	Level 1 + submit documents, update certain account details, and correspond with the CRA on your behalf.