

Set up Instructions for My Account for Individuals

The following are the instructions to use when setting up your “My Account” with CRA for individuals.

1. Go to My Account for Individuals CRA and scroll down to Options 1 and 2, choose either option 1 – Sign in or register with a sign in partner or Option 2 - Sign in with your CRA user ID and password or register **(for option 1 if you are unsure if you are able to sign in using the sign in partners, click on the “view list of sign in partners” and this will drop down the financial institutions that have this service available)**
2. [My Account for Individuals - Canada.ca](https://www.canada.ca/en/revenue-agency/services/e-services/cra-login-services/cra-user-password-help-faqs/registration-process-access-cra-login-services.html#hlp1d)
 - Complete the steps as required
 - You will need your personal information including SIN, date of birth, postal code, amount from an income tax return from the current or previous tax years – the line amount they require varies so we recommend having a copy of both ready (if you need copies of the returns, please contact us)
 - Set up the necessary ID, password, security questions, multi-factor authorization
 - You will then wait for the code to arrive in the mail in 5-10 business days (this is if you are using CRA Sign in)
 - Once you have received the code, log back into My Account, enter the security code when prompted and you should then have full access to your My Account
 - Keep your security code, ID, password and answers to your security questions somewhere safe as we do not have access to this information
 - After you complete the registration process you will have access to limited tax information on My Account until you receive your code in the mail. After you enter in your CRA security code you will have access to the full suite of services in My account as well as the Auto fill my return service
 - If you have not done so, we do recommend that you set up your direct deposit information as well

Full instructions can be found at: <https://www.canada.ca/en/revenue-agency/services/e-services/cra-login-services/cra-user-password-help-faqs/registration-process-access-cra-login-services.html#hlp1d>

If you have any issues, concerns, or questions about any of this, need help with any of it, please do not hesitate to contact us.

3. If you have a Business and need to set up a MY Business Account as well, please complete the steps above then see the My Business Account instructions to provide our office Authorization for your business.

There is only ONE log in for My Account (for individuals) and MY Business Account – it will be the same for both.