

# Representatives: How to Access TRACS

Instructions for representatives to get access to Tax and Revenue Administration Client Self-Service (TRACS).



## What is TRACS?

TRACS is an online portal that allows individuals to access a specific account administered by Tax and Revenue Administration (TRA).

## What are the benefits of TRACS?

TRACS allows an individual with consent to:

- View financial transactions by processed date ranges or period end; and
- View assessment status including the receipt date, return status, processed date, and if applicable, the notice of assessment or reassessment for each return submitted.

Depending on the program, an individual with applicable permissions can file a return, submit supporting documents and more. To learn more about a specific program and TRACS, go to <https://www.alberta.ca/tax-levy-payments-administration.aspx>, select a program and go to the 'Maintain your account in TRACS' section on the program page.



## How does a third-party representative get access to a client's TRACS account?

1. The taxpayer completes and signs the [Alberta Consent Form \(AT4930\)](#). Ensure Section 2(b) – Authorize online access (TRACS) is selected.
2. The representative must create a MyAlberta Digital ID basic account if they do not already have one.

3. Submit the form. TRA will review the form, and if complete, will send a PIN to the email address provided using secure email.
4. Follow the instructions in the email to access the account in TRACS.

## Join our subscription service

To ensure you are aware of updates or changes to a program administered by TRA, enroll for TRA's Subscription Service at:

<http://tra.alberta.ca/subscribe.html>

## Additional information

- At this time, access to TRACS cannot be assigned to a firm. Individuals must apply for a MyAlberta Digital ID.
- A separate consent form must be completed and signed by the taxpayer for each individual requiring access.
- If your firm or company regularly requires specific individuals to request documents or instalment balances, it is recommended that these individuals obtain consent and receive access to TRACS.
- TRA recognizes electronic signatures. To be able to digitally sign the form, it must be downloaded or opened as a PDF document.

Email TRA at [TRA.Revenue@gov.ab.ca](mailto:TRA.Revenue@gov.ab.ca) if you require more information.