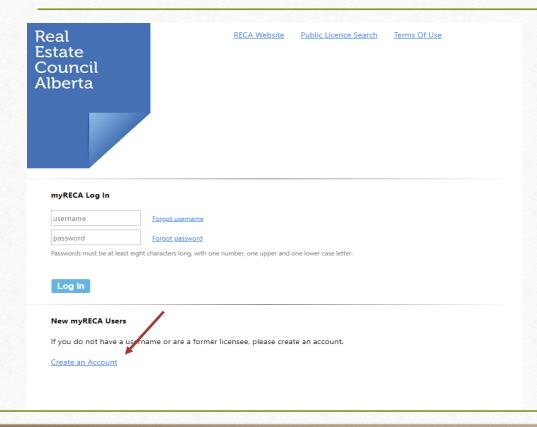


# Filing Accounting Reports online – accountant (CPA)

- Create myRECA user account
- Legal first/last name, email
- Username and Password
- Security Questions and Answers
- Practice Review department review
- Accountant Tab Search for Forms
- What if I make an entry error?



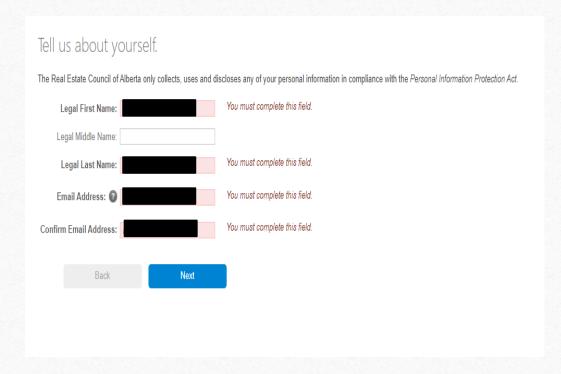
#### Create a myRECA user account



- New myRECA Users
- Create an Account



### Legal first/last name, email



- Complete required fields
- Individual creating account must have a CPA designation. RECA does a search on the name here to confirm credentials prior to approving user account to complete Form 3's on behalf of a brokerage.



#### Username and Password

| Create a username and password  |  |  |  |  |
|---|--|--|--|--|
| Create a username 8 to 20 characters long. Your username cannot be the same as your email address, and can only contain letters, numbers and underscores. |  |  |  |  |
| Create a password at least 8 characters long, with at least one number, one upper case letter and one lower case letter.                                  |  |  |  |  |
| Username: 🕜   |  |  |  |  |
| Password:   |  |  |  |  |
| Confirm Password:   |  |  |  |  |
| Back Next   |  |  |  |  |

- Select a Username
- Create a Password



### Security Questions and Answers

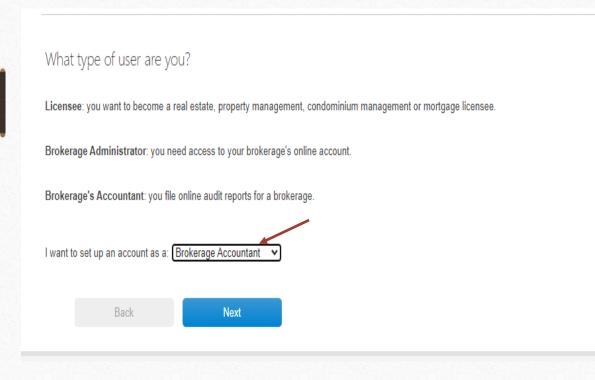
|               |                         | / 1                                |      |
|---------------|-------------------------|------------------------------------|------|
| The answers v | will help us confirm yo | ur identity if you forget your pas | swor |
| Question 1:   | What is the name of     | your favourite childhood friend?   | ~    |
| Answer 1:     |                         |                                    |      |
| Question 2:   | What is your oldest of  | ousin's first name?                | ~    |
| Answer 2:     |                         |                                    |      |
| Question 3:   | What was your first o   | ar?                                | ~    |
| Answer 3:     |                         |                                    |      |
|               | Deels                   | New                                |      |
|               | Back                    | Next                               |      |

Select three security questions and provide answers.

 In case of lost username and/or password, security questions and answers are designed to help you retrieve you login info



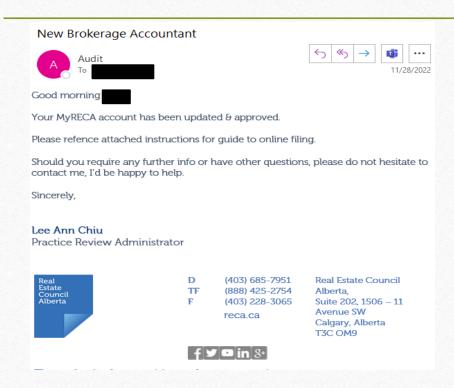
## Type of user – brokerage accountant



- First time login will prompt you to select what type of user you are.
- Select "Brokerage Accountant"



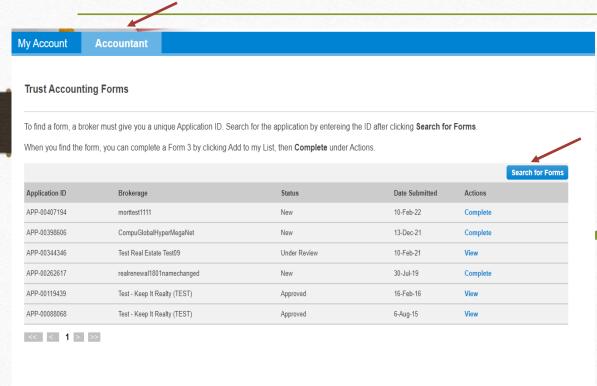
#### Practice Review department review



- Practice Review Administrator receives an automated notification out of myRECA of a new brokerage accountant user
- Credentials of brokerage accountant reviewed to ensure the individual is a registered CPA
- After confirmation, CPA user account is granted approval to proceed to have access to complete Form 3 reports on behalf of licensed brokerages



#### Accountant tab – Search for Forms

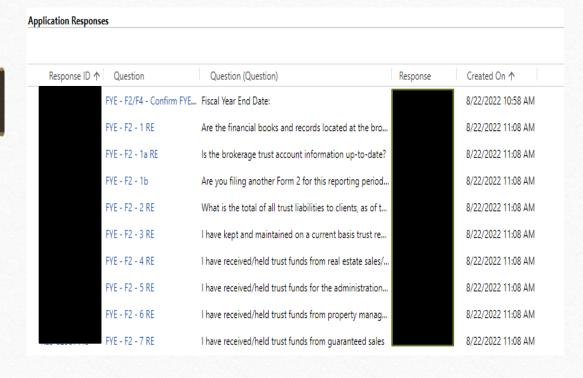


- New tab available, "Accountant".
- Click on "Accountant" tab, then click on blue tab in right hand corner labeled "Search for Forms"
- Enter in Form 3 Application ID provided to you by your client.

| My Account      | Accountant  |        |
|-----------------|-------------|--------|
| Search for an   | Application |        |
| Application ID: |             | Search |
|                 |             |        |



#### What if I make an entry error?



- Mistakes happen, we can help!
- myRECA does not allow for changes to responses after completion.
- To have amendment made, email audit@reca.ca and reference question number with corrected response.

  Administrator will make amendment in myRECA on your behalf.