Business Representative: MyFTB Account - Register

MyFTB provides you with 24/7 online access to the income tax information of the business entity (corporation, limited liability company, or partnership) and online services, such as chat with a customer service representative about confidential matters. Some other features available on MyFTB:

- View your business entity’s:
  - Payment history.
  - Account period details.
  - Images of notices and correspondence.
- File a Power of Attorney (POA) declaration.
- Authorize Full Online Account Access for your tax professional representative(s).
- Update contact information.

Important! You must have a recent California business tax return on file in order to register for a MyFTB Business Representative account.

To register for or activate your MyFTB Business Representative account:

- Go to www.ftb.ca.gov.
- Select Account in the Global Navigation Menu (blue ribbon that runs across the top of the page).
- Follow the steps below.

Steps

Step 1: Select Option - Register or Activate MyFTB Business Representative Account

- Register for a MyFTB Business Representative Account
- To create your account, you will need:
  - A valid email address.
  - The account number for the business entity.
  - Your mailing address.
Note: If you moved since you filed your last tax return, call us to update your mailing address before you register for a MyFTB account, 800.852.5711.

- Information from a filed California tax return for one of the last five tax years.
  - Continue to Step 2 to create your MyFTB Business Representative account.
- Activate MyFTB Business Representative Account - Personal Identification Number (PIN) Received
  - Skip to Step 9 to activate your MyFTB Business Representative account.

**Step 2: Create Your MyFTB Business Representative Account**

- From the MyFTB account page, select the:
  - Create an account button on the left navigation menu, or
  - Create an account link located in the MyFTB login section.
Step 3: MyFTB Account Registration

- Select the Create MyFTB account button in the lower section of the Create a MyFTB account page.

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Create MyFTB account
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Step 4: Enter Account Registration Information

Important! If you moved since you filed your last return, call us at 800.852.5700 before you register.

Note: Fields with a red asterisk (*) next to them are required fields and must be filled in.

- On the Account Registration page, enter:
  
  - Your first name, middle Initial and last name in the applicable fields.
  - The user name you created in the User Name field.

  Note: User names can only contain letters and numbers. No spaces or special characters are allowed. It must be between 4 and 17 characters.

  Important! Make note of your user name. You will need it to activate your MyFTB account. If you forget your user name before you activate your MyFTB account, you will have to re-register beginning with Step 1.

  - Your email address (75 character maximum) in the Email Address field.

  Note: The only special characters allowed are a period “.”, underscore “_”, dash “-”, and at “@”. Any special characters on either side of the “@” symbol will not be accepted.

  We will use the email address you enter to send a confirmation email. You must follow the instructions in the email to complete the registration process.

  - Your email address again in the Re-enter Email Address field.

  - Type the characters from the picture in the field directly below the picture.
Step 5: Create Your Profile

Note: Fields with a red asterisk (*) next to them are required fields and must be filled.

- On the Create Profile page:
  - In the Security Questions section:
    - Note: You will be able to change your security questions and answers at any time in your user profile.
Select your three security questions from the three Question dropdown menus (Question 1, Question 2, and Question 3).

Enter your answer for each security question in the Answer fields (Answer 1, Answer 2, and Answer 3).

**Note:** Your answers must be 3 to 17 characters.

- In the Password section:
  **Note:** Password **must** be 8 to 32 characters and include upper and lower case letters, a number, and a special character. For tips on creating a password, select the Password Tips link
  - Create your password (passwords are case sensitive).
    **Note:** You will be able to change your password at any time in your user profile.
  - Enter the password in the Password field.
  - Enter your password again in the Re-enter Password field.

**Important!** Make note of your password because you will need it to activate your MyFTB account. If you forget your user name or password before you activate your account, you will have to **re-register beginning with Step 1.**
Security Questions

Select three security questions below and enter an answer for each question. These questions and answers will be used to identify you if you forget your user name or password.

* Question 1

* Answer 1

3 to 17 characters

* Question 2

* Answer 2

2 to 17 characters

* Question 3

* Answer 3

3 to 17 characters

Note: You will be able to change your security questions and answers at any time in your user profile.

Password

Passwords are case sensitive.

Password Tips

* Password

8 to 32 characters.
Must include upper and lower case letters, a number, and a special character.

* Re-enter Password

Note: You will be able to change your password at any time in your user profile.

- Select the Continue button.
**Step 6: Choose Your Role**

To register additional roles (Individual or Tax Professional), you **must register each role as a separate account** and use a different user name. We only allow one role per account. Business Representatives can add other businesses to their account.

- Select the **Business Representative** radio button on the Choose Your Role page.

**Choose Your Role**

Select one role below.

To register additional roles, you must register each role as a separate account using a different user name. We only allow one role per account. Business representatives can add other businesses to their account. Tax Professionals can add clients to their account.

- Individual - Access your personal income tax information.
- Business Representative - Access income tax information of the business entity (corporation, limited liability company, or partnership).
- Tax Professional - Access income tax information on behalf of your individual or business entity client.

- Select the **Continue** button.

**Step 7: Enter Your Business Representative Registration Information**

The **Business Representative Registration** page requires you to verify your business address on file with us, enter the company type, business account number, and information from a previously filed California business tax return.

**Note:** Fields with a red asterisk (*) next to them are required fields and must be filled in.

- On the **Business Representative Registration** page:
  - In the **Verify Your Business Address on File** section:
    - Enter the numbers in your business mailing address (do not include the street name) in the **Numbers in Mailing Address** field or check the box to indicate **Mailing address does not contain numbers**.
    - Enter your zip code in the **US Zip Code** field or check the box to indicate **Mailing address does not contain a US Zip Code**.
    - Select the **type of company** from the **Type of company** dropdown menu.
    - Enter the business entity’s **account number** in the **Account number field**.
  - In the **Shared Secret** section, enter information from **one of your previously filed California** business entity tax returns for one of the **last 5 tax years**. Refer to your CA tax return:
**Note:** You **must have a California business entity tax return on file with FTB** in order to register to use MyFTB Account online features.

- Select the year on the tax return filed from the **Year of the tax return** dropdown menu.
  
  **Note:** Original returns only, not amended returns.

- Select the tax form type filed for the year that you chose, from the **Tax form type** dropdown menu.

- Enter the net income (loss) shown on that form in the **Net Income (Loss) shown on that form** field.

  **Note:** Enter loss with a dash (-). Whole dollars only, 12 maximum.
• Read the **penalty of perjury** statement and check the box to acknowledge.

> **Please read and check the box before submitting:**
> □ Under penalties of perjury under the laws of the state of California, I declare that I am an employee or authorized representative of the Business Entity listed above and legally have a right to access the company data and transact tax business on behalf of the company.

• Select the **Submit** button.

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**Step 8: Registration Confirmation**

• The **Registration Confirmation** page displays to confirm you successfully created your MyFTB account and provides the email address that we sent your confirmation to.

• Franchise Tax Board will mail you a **Personal Identification Number (PIN)** to activate your account. The PIN will be mailed via the United States Postal Service within 3 to 5 business days. **Please allow 10 business days to receive the PIN.**

• For your protection, we will not provide your PIN by phone, FAX, or email.

• You have **21 days from the date** you register to enter the PIN to activate your account. **If you do not**, you will need to **re-register beginning with Step 1**.

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**Registration Confirmation**

You've successfully created your MyFTB account. We sent a confirmation to Polly.Ester@ljustregistered.com

1. Create Your Account

2. Wait for Your PIN
   
   You should receive your PIN by U.S. mail within 10 business days.
   
   For your protection, we won’t provide your PIN by email, FAX, or phone.
   
   If you have a visual disability and need an accommodation to receive your PIN, go to Accessibility for assistance.
   
   Can’t wait for your PIN? File or Pay now.

3. Log In

Log in and enter your PIN within 21 days from the date you registered to activate your account.
After you receive your PIN:

**Step 9: Activate Your Account**

You **must log in and enter your PIN within 21 days from the date you registered** to activate your account. **If you do not**, your PIN will expire and you **must re-register beginning with Step 1**.

- Select the **Log in to my account** button in the **MyFTB login** section on the **MyFTB account** page.

**Step 10: Access Your Account**

**Important!** If you **forgot your user name or password** that you created when you registered, you **must re-register beginning with Step 1**.

- On the **Access Your Account** page, enter:
  - Your user name that you created when you registered for your MyFTB Tax Professional account in the **User Name** field.
  - Your password that you created when you registered for your MyFTB Tax Professional account in the **Password** field.
  - The characters from the picture for security purposes.

- Select the **Login** button.
Step 11: Enter PIN

Your one-time use PIN is used to activate your MyFTB account. You will not need it again to login.

- On the Enter PIN page, enter your one-time use PIN from the letter you received in the mail, in the Personal Identification Number (PIN) field.
- Select the Continue button.

Step 12: Account Activated Confirmation

The Account Activated page displays a message to confirm your MyFTB Business Representative account has been activated.

Note: You no longer need to enter your PIN. When you log in to your MyFTB account in the future, you will only need to enter your User Name and Password, and provide answers to your Security Questions.

- Select the Continue button to navigate to your MyFTB Business Representative account.
Step 13: View Your MyFTB Business Representative Account

The Business Entities List page is the homepage that displays each time you log in.
To add additional businesses you are a business representative for, select the Add New Business button.