Individual: MyFTB Account – Register

MyFTB provides you with 24/7 online access to your personal income tax account information and online services, such as chat with a customer service representative about confidential matters. Some other features available on MyFTB:

- View your:
  - ➢ Estimated payments and credits before you file your return.
  - ➢ California wage and withholding information.
  - ➢ Tax year details.
  - ➢ Images of filed returns, notices, and correspondence.
- File a Power of Attorney (POA) declaration.
- Authorize **Full Online Account Access** for your tax professional representative(s).
- Update your contact information.

Important! You **must have a recent California tax return on file** in order to register for a MyFTB Individual account. If you filed a joint tax return, you **must each register** for a separate MyFTB Individual account.

To register for or activate your MyFTB Individual 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 Individual Account

- **Register for a MyFTB Individual Account**
- To create your account, you will need:
  - ➢ A valid email address.
  - ➢ Your Social Security Number (SSN).
  - ➢ Your mailing address.

Important! 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.

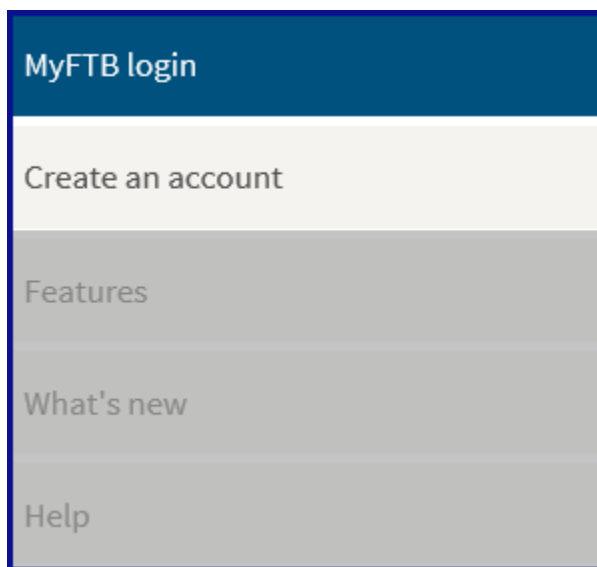   ▪ [Continue to Step 2 to create](#) your **MyFTB Individual** account.

- To activate your MyFTB Individual Account - Personal Identification Number (PIN) Received

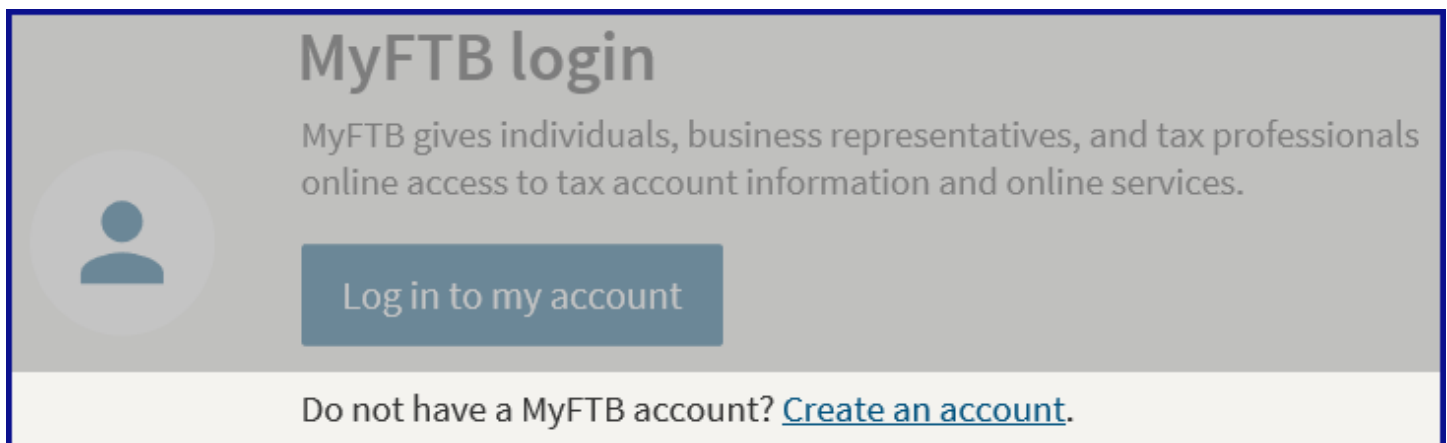   ➢ [Skip to Step 9 to activate](#) your **MyFTB Individual** account.

Step 2: Create Your MyFTB Individual Account

- From the **MyFTB account** page, select the:

   ➢ **Create an account** button on the **left navigation menu**, or

MyFTB login
Create an account
Features
What's new
Help

   ➢ **Create an account** link in the **MyFTB login** section.

   ## MyFTB login

   MyFTB gives individuals, business representatives, and tax professionals online access to tax account information and online services.

   👤

   [Log in to my account]

   Do not have a MyFTB account? [Create an account](#).

Step 3: MyFTB Account Registration

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

Create MyFTB account

Step 4: Enter Your 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.
  - ➢ The characters from the picture in the field directly below the picture.

* First Name

11 characters maximum

Middle Initial

1 character

* Last Name

13 characters maximum

Suffix (if any)

Enter your user name. Only letters and numbers are allowed, no spaces or special characters.

* User Name

Between 4 and 17 characters

* Re-enter User Name

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

* Email Address ?

75 characters maximum

* Re-enter Email Address

* Type the characters from the picture

PNWXB

- Select the **Continue** button.

Continue | Cancel

Step 5: Create Your Profile

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

- 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. 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**

[   ]

3 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.
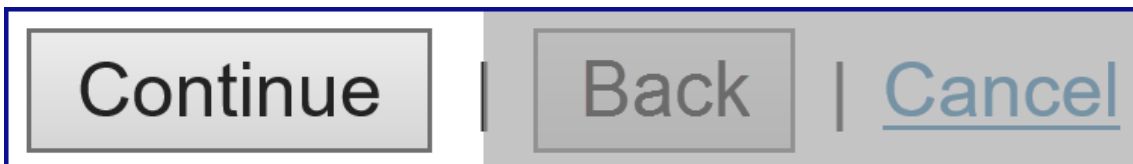
- Select the **Continue** button.

Step 6: Choose Your Role

To register additional roles (Business Representative 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.

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

- Select the **Continue** button.

Step 7: Enter Your Individual User Registration Information

The **Individual User Registration** page requires you to enter your social security number, verify your address on file with us, and enter information from a previously filed California personal tax return.

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

Step 7a:

- On the **Individual User Registration** page:
  - Enter your Social Security Number (SSN) in the **Social Security Number** field.

    Note: Enter 9 numbers only, no dashes.

  - In the **Verify Your Address on File** section, enter:
    - Up to six numbers in your mailing address (do not include the street name) in the **Numbers in Mailing Address** field, or if there are none, leave blank and check the box to indicate **Mailing address does not contain numbers**.

- Your zip code (up to five numbers) in the **US Zip Code** field, or if there are none, leave blank and check the box to indicate **Mailing address does not contain a US Zip Code**.

➢ In the **Information From a Previously Filed Return** section, enter information **from one of your previously filed California** personal tax returns for one of the **last 5 tax years**. Refer to your CA tax return, and:

Note: You **must have a California personal 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 on the tax return filed** dropdown menu.

- Select the filing status indicated on the tax return that you chose, from the **Filing status** dropdown menu.

- Enter your California Adjusted gross income shown on that tax return in the **California Adjusted gross income (AGI) field**.

  Note: Enter losses with a dash (-). Whole dollars only, 9 maximum.

▶ Individual User Registration

* Required field

NICOLE A WADE

* Social Security Number

[   ]

9 numbers only, no dashes

Verify Your Address on File

> ⓘ **Important Information**
>
> If you moved since you filed your last return, call us at 800.852.5711 **before registering**.
> Persons with hearing or speech impairments, call TTY/TDD 800.822.6268.

☐ **This is a foreign address.**

* Enter the numbers in your mailing address or check the box to indicate your mailing address does not contain numbers.

Numbers in Mailing Address [?]

[   ]

(Up to 6 numbers only; if none, leave blank)

☐ **Mailing address does not contain numbers.**

* Enter your US ZIP Code or check the box to indicate your address does not contain a US ZIP Code.

US ZIP Code [?]

[   ]

(5 numbers only; if none, leave blank)

☐ **Mailing address does not contain a US ZIP Code.**

Information From a Previously Filed Return

For security purposes, we require the following information from a previously filed California tax return to complete the registration process. You must have a return on file in order to register to use MyFTB Account online features.

* Year on the tax return filed

[▾]

* Filing status

[▾]

* CA Adjusted gross income (AGI) [?]

$ [   ] .00

Enter losses with a dash (-). Whole dollars only, 9 maximum

Step 7b:

- 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 acknowledge that obtaining taxpayer account information is the privilege of individual taxpayers and their authorized representatives and that unauthorized access to account information is unlawful as described in Section 502 of the California Penal Code.**

Step 7c:

- Select the **Submit** button.

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 your PIN to activate your account. **If you do not**, you will need to re-register beginning with Step 1.

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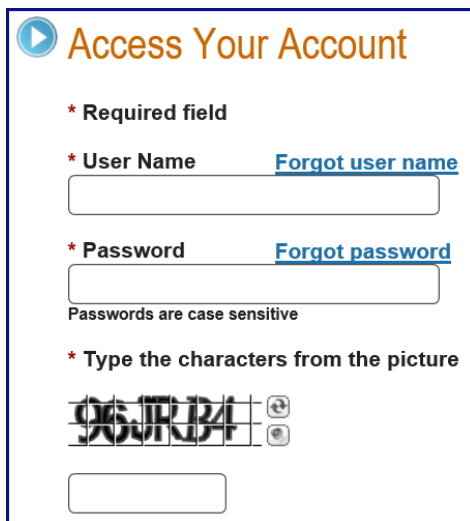
- Select the **Log in to my account** button in the **MyFTB login** section on the **MyFTB account** page.

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 Step1.

- On the **Access Your Account** page, enter:

  ➢ Your user name that you created when you registered for your MyFTB Individual account in the **User Name** field.

  ➢ Your password that you created when you registered for your MyFTB Individual account in the **Password** field.

  ➢ The characters from the picture in the field below the picture.

- 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 Individual 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 Individual** account.

Step 13: View Your MyFTB Individual Account

The **Taxpayer Overview** page is your homepage and displays each time you log in.

- Your **Taxpayer Overview** page:
  - ➢ Displays **Alerts** when there is important activity on your account or we need you to do something.
  - ➢ Shows your current contact information in the **Contact Information** section.
  - ➢ **Account Status** section provides key information about your account and links to additional information.
  - ➢ **Account Access** section displays the last time you accessed your account online. It also displays the last authorized representative who accessed your account.
  - ➢ Provides menu dropdowns with links to your account information and services.
  - ➢ Displays the CalFile icon to allow you to file your California state tax return and the Web Pay icon to make or schedule a payment.
  - ➢ **Contact Us** section displays icons to initiate a **Secure Chat** with a customer service representative (during business hours) or **Send a Secure Message** (24 hours a day, 7 days a week) to FTB.