Tax Professional: MyFTB Account - Register

MyFTB provides you with 24/7 online access to your client's online tax account information and online services. Some of the available features on MyFTB:

- File a Power of Attorney (POA) declaration.
- Add a Tax Information Authorization (TIA) client to your **Client List**.
- View, update, and select your preferred contact information.
- View your client's online tax account information, such as:
  - Estimated payments and credits before filing a return.
  - Account details.
  - Images of notices and correspondence.

Note: Available actions and online tax account information you have access to view, depends on the status of your POA or TIA relationship and your **Online Account Access Level** for that specific client. For more information about **Online Account Access Levels**, refer to MyFTB Tax Professional Online Account Access.

For information about some of the available actions available on MyFTB, refer to:

- Power of Attorney (POA) Declaration - Submit Form 3520 (PIT or BE)
- Tax Information Authorization (TIA) – Add TIA Client
- Client List – Search for Client
- Full Online Account Access – Request (Opt-In)

To register for or activate your MyFTB Tax Professional account:

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

Steps

Step 1: Register or Activate MyFTB Tax Professional Account

- I want to register for a MyFTB Tax Professional account.

    - Continue to Step 2.

  Note: To create your MyFTB Tax Professional account, you will need:

    - A valid email address.
    - Your Social Security Number (SSN).
    - One of the following professional ID numbers:
        - Preparer Tax Identification Number (PTIN)
        - Enrolled Agent Number with a California address
        - California CPA Number
        - California State Bar Number

      Note: If you **do not have one of the listed professional ID numbers**, you cannot create a MyFTB Tax Professional account.

- I received my Personal Identification Number (PIN) in the mail and want to activate my MyFTB Tax Professional account.
    - Skip to Step 9.

Step 2: Access Create a MyFTB Account Page

- 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: Create a MyFTB Tax Professional Account

- Select the **Create MyFTB account** button on the **Create a MyFTB account** page.

Step 4: Enter Account Registration Information

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

- On the **Account Registration** page:
    - Enter your **first** and **last name** and **middle initial**.
    - Create your **User Name**.

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

      Make note of your user name because 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.

- Enter your **Email Address** (75 character maximum).

  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 below to send a confirmation email. You must follow the instructions in the email to complete the registration process.

- Type the characters from the picture for security purposes.
- Select the **Continue** button.

Step 5: Create Your Profile

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

- Select your three **Security Questions** and enter an answer for each question on the **Create Profile** page.
- Create and enter your **Password**.

  Note: For tips on creating a password, select the **Password Tips** link.

- **Re-enter your Password**.

  Note: 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 re-register beginning with Step 1.

- Select the **Continue** button.

Step 6: Choose Your Role

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

  Note: To register additional roles (Individual or Business Representative), you **must register each role as a separate account** and use a different user name. We only allow one role per account.

- Select the **Continue** button.

Step 7: Enter Your Tax Professional Information

Note: **All fields are required** on this page and **must be filled in** to continue.

- On the **Tax Professional Registration** page:
  - **Select an identification type** from the dropdown menu:
    - PTIN (Preparer Tax Identification Number)

        - CA CPA (California Certified Public Accountant Number)
        - CA State Bar (California State Bar Number)
        - CA EA (California Enrolled Agent Number)

        Note: Register with your PTIN, if available, to increase the likelihood that Power of Attorney (POA) declarations processed on or after October 1, 2014 will display your POA clients on your **Client List** in your MyFTB account, upon initial login.

    - Enter your **Social Security Number**.

        Note: Enter 9 numbers only, no dashes.

    - Enter your **identification number**.
        - PTIN – Enter "P" followed by 8 numbers.
        - CA CPA – Enter "CPA" followed by 5 or 6 numbers. If your CPA number is less that 5 numbers, insert zeros after "CPA" to reach 5 numbers.
        - CA State Bar – Enter up to 6 numbers.
        - CA EA – Enter up to 8 digits. You must have a California address on file with the IRS.

- Read and select the certification checkbox to acknowledge that you understand the guidelines and what the result may for failure to follow them.
- 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

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

Step 10: Continue to Access Your Account

- Select the **Continue to Login** button on the **MyFTB Account** page.

Step 11: Access Your Account

- 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 12: Enter PIN

Your **one-time use** PIN is used to activate your MyFTB account. You **will not need it** to log in.

- 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 13: Account Activated Confirmation

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

- Select the **Continue** button to navigate to your MyFTB Tax Professional account.

Note: The **Tax Professional Overview** page is your homepage that displays every time you log in. The first time you access your MyFTB Tax Professional account, you may not see any POA or TIA clients listed on your **Client List**.

If there are no clients listed on your **Client List**, enter your search criteria in the **Search Options** section on your **Client List** page and search for your clients, refer to Client List – Search for Clients.

If you are still unable to locate your clients, contact the Tax Practitioner Hotline, 916.845.7057