Tax Professional: MyFTB Account - Register

MyFTB provides tax professionals with 24/7 online access to income tax information on behalf of your individual or business entity clients and online services, such as chat with a customer service representative about your client's confidential matters. Some other features available on MyFTB:

- View your client's:
  - Estimated payments and credits before filing a return.
  - California wage and withholding information.
  - Tax Year details.
  - Images of filed returns, notices and correspondence.
- 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.

Note: The status of your POA or TIA relationship and your level of online account access for a specific client determines what account information you have access to view and available actions. For more information about levels of online account access, refer to Online Account Access Levels.

For information about 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 page).
- Follow the steps below.

Steps

Step 1: Select Option - Register or Activate MyFTB Tax Professional Account

Register for a MyFTB Tax Professional Account

- To create your account, you will need:
  - A valid email address.
  - Your Social Security Number (SSN)
  - One of the listed professional ID numbers:

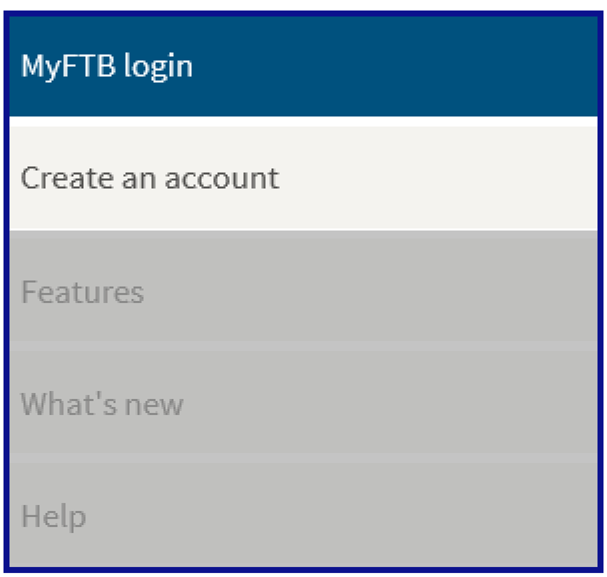
    Important! You **must have one of the listed professional ID numbers** to register.
    - Preparer Tax Identification Number (PTIN)
    - Enrolled Agent (EA) Number with a California address on File with the IRS
    - California Certified Public Accountant (CPA) Number
    - California State Bar Number
      - Continue to Step 2 to create your **MyFTB Tax Professional** account.

Activate My MyFTB Tax Professional Account

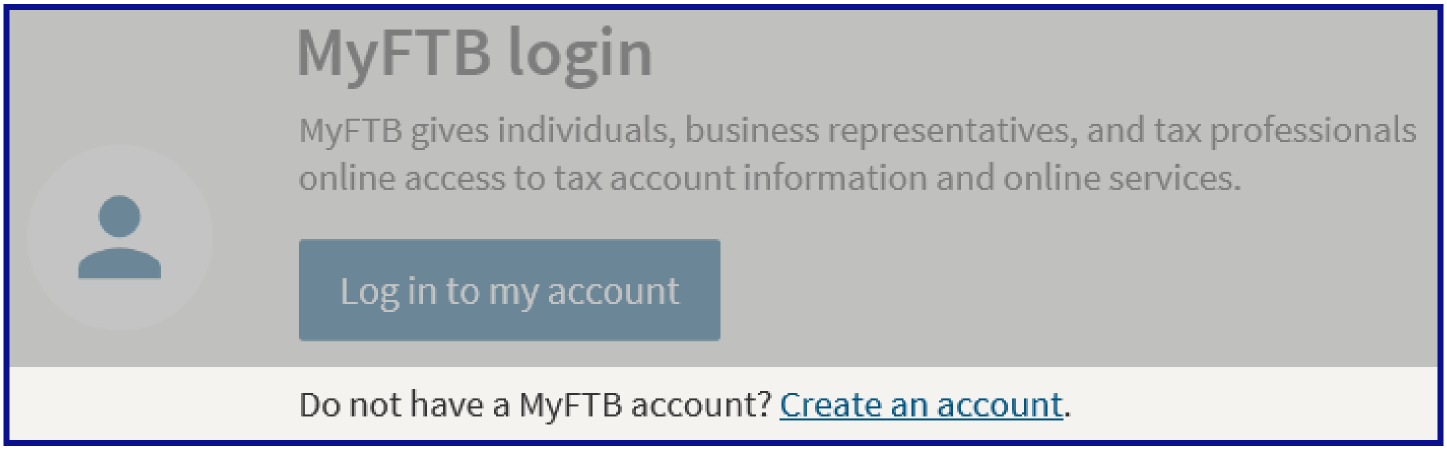
- Skip to Step 9 to activate your **MyFTB Tax Professional** account.

Step 2: Create Your MyFTB Tax Professional Account

- From the **MyFTB account** page, select the:
  - **Create an account** button on the **left navigation menu**, or



- ➢ **Create an account** link 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.

Step 4: Enter Your Account Registration Information

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

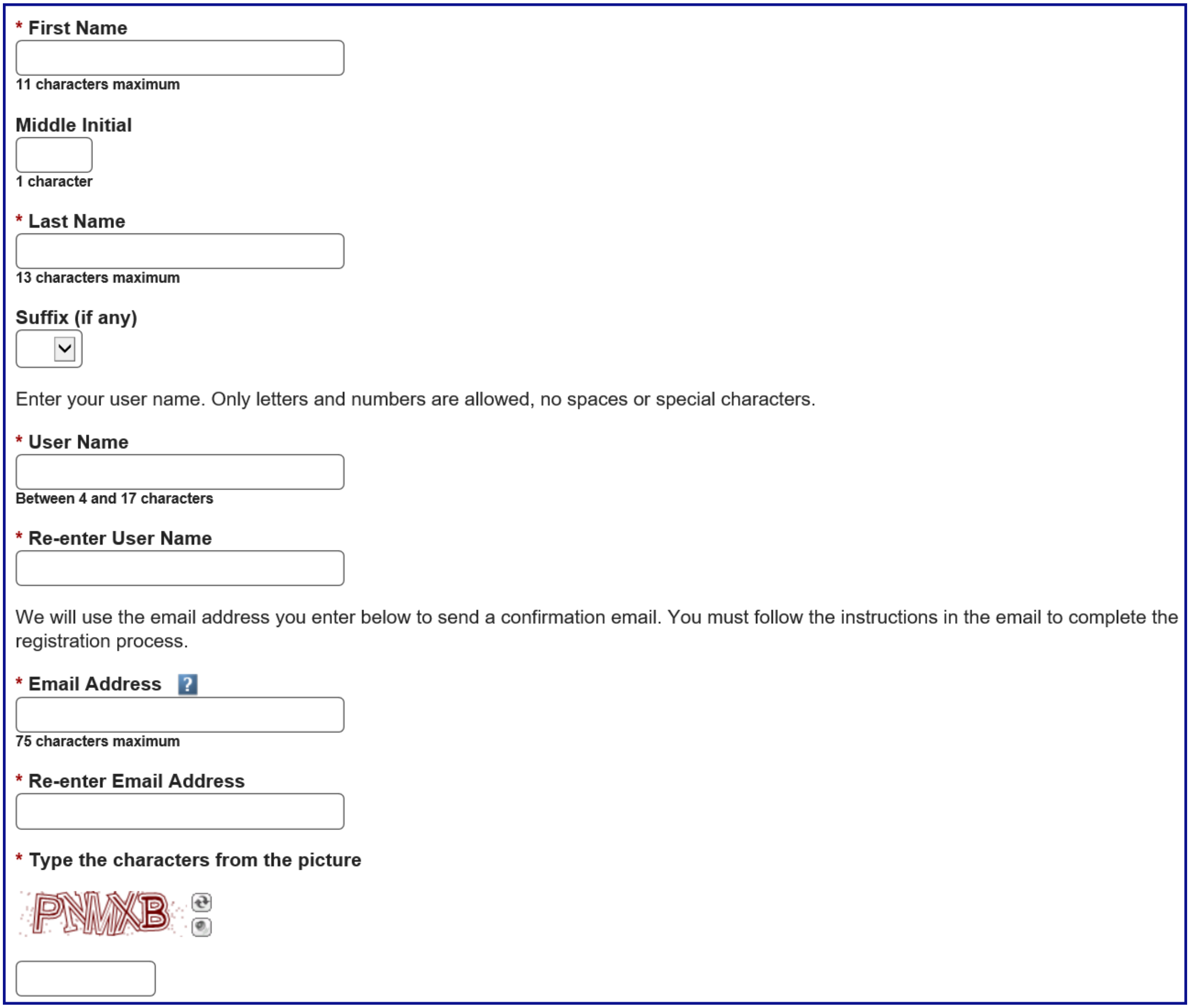
- On the **Account Registration** page, enter:
  - ➢ Your **first name, middle initial** and **last name**.
  - ➢ The user name you created in the **User Name** field

    Note: User names can only contain letters and numbers. **No spaces or special characters**. 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.

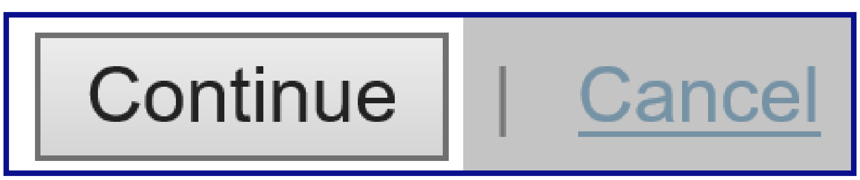
* Email Address

75 characters maximum

* Re-enter Email Address

* Type the characters from the picture

- 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.

- 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:

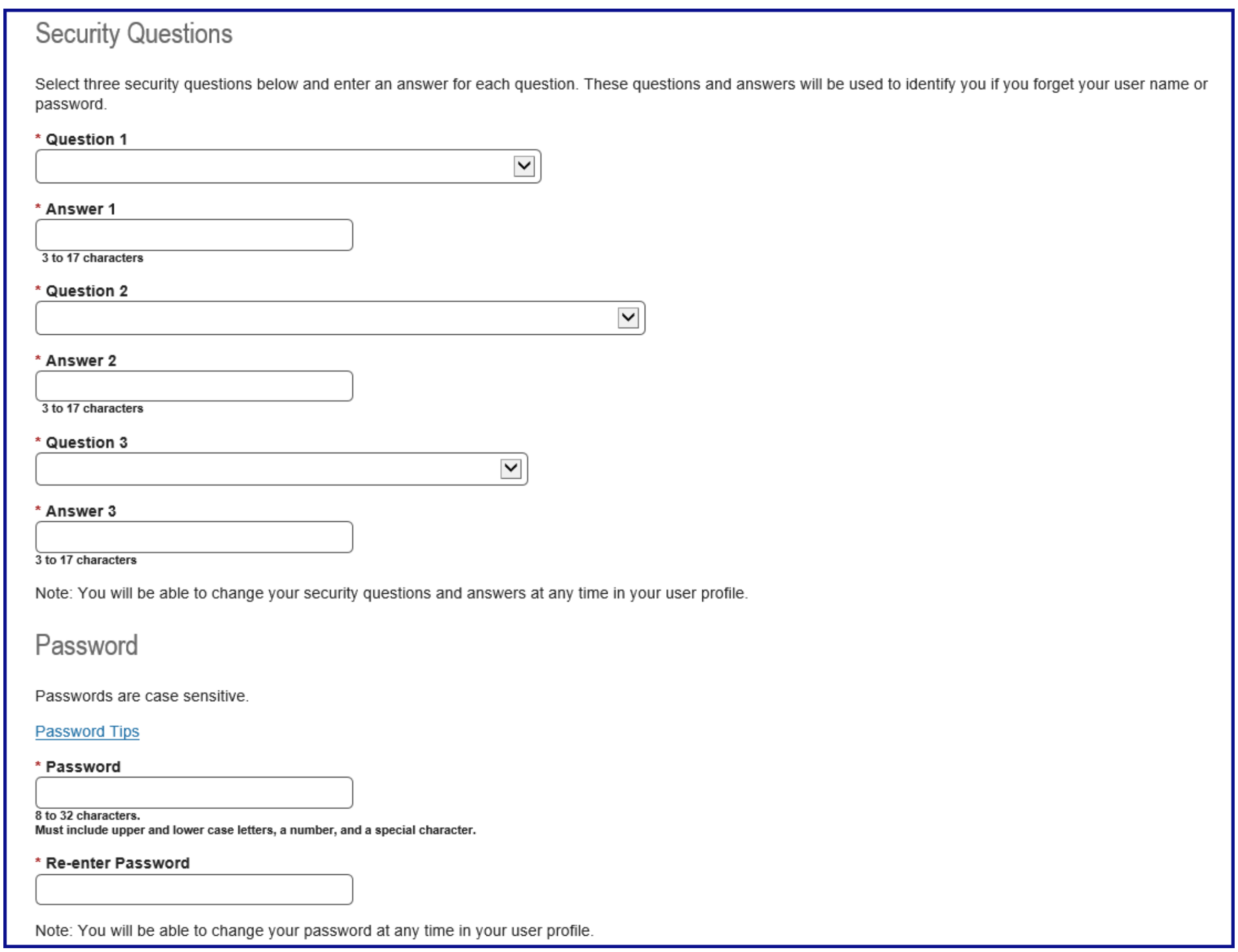
  Note: Password **must** be 8 to 32 characters and include upper and lower case letters, a number, and a special character. For tips on creating a password, select the **Password Tips** link.

  - Create your password (passwords are case sensitive).

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

  - Enter your 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

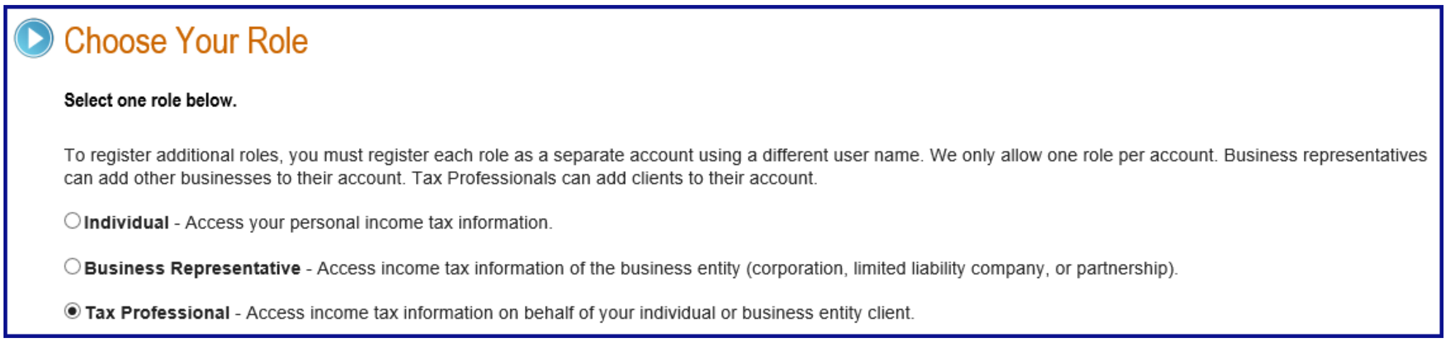
Note: You will be able to change your password at any time in your user profile.

- Select the **Continue** button.

Step 6: Choose Your Role

To register additional roles (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. Tax Professionals can add clients to their account.

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



- Select the **Continue** button.

Step 7: Enter Your Tax Professional Registration Information

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

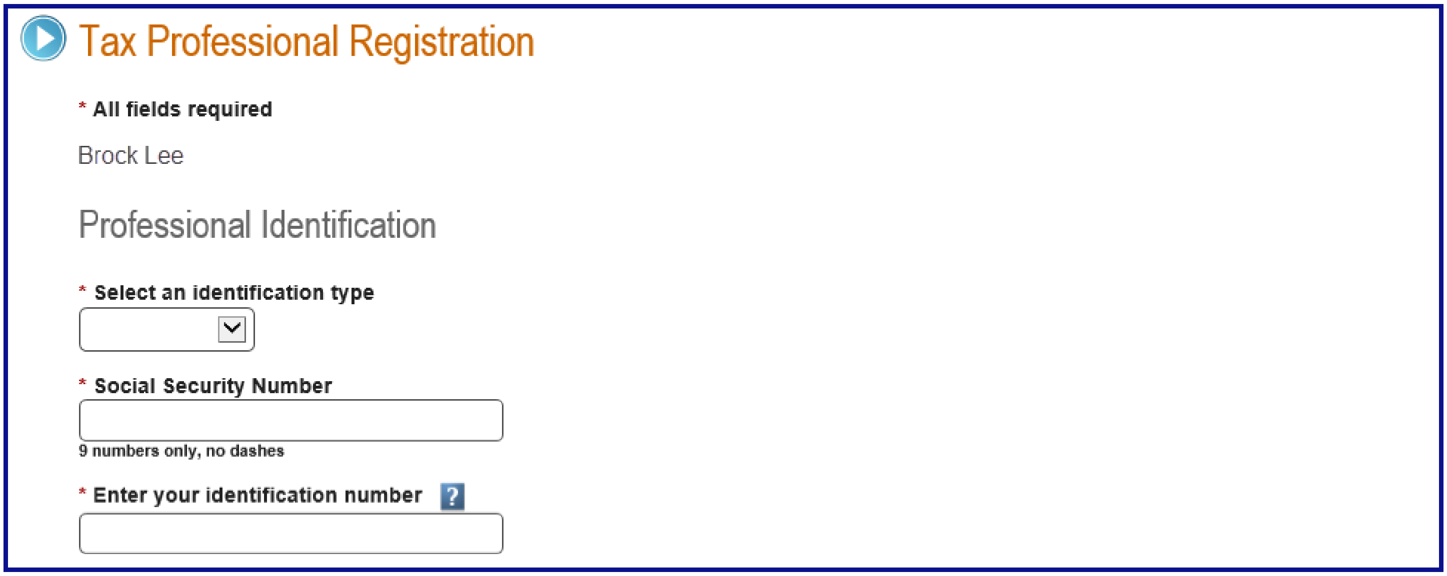
- On the **Tax Professional Registration** page, in the **Professional Identification** section:
  - Select one of the identification types from the **Select an identification type** dropdown menu:
    - PTIN (Preparer Tax Identification Number)
    - CA CPA (California Certified Public Accountant Number)
    - CA State Bar (California State Bar Number)
    - CA EA (California Enrolled Agent Number)

    Note: We recommend that you register with your PTIN, if available. This will help ensure your POA clients display on your MyFTB **Client List** upon initial login, for Power of Attorney (POA) declarations received on or after October 1, 2014.

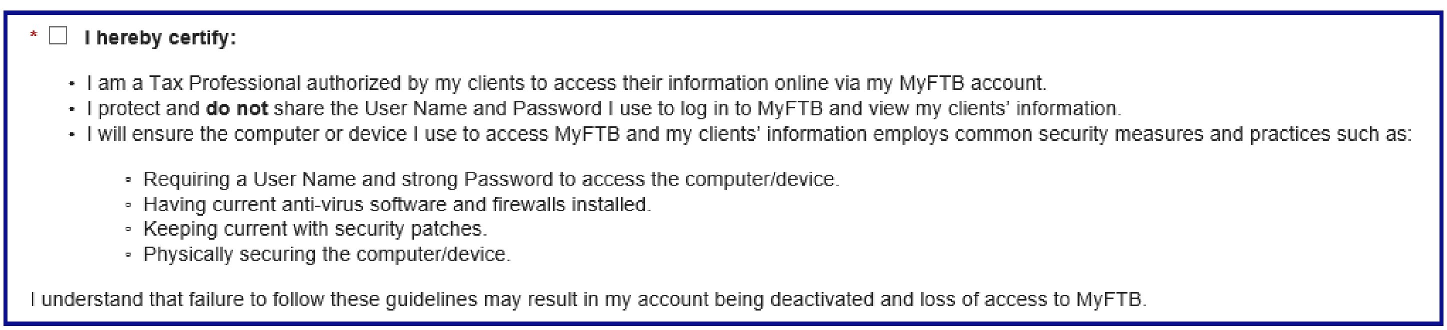
- Enter your **Social Security Number**.

  Note: Enter 9 numbers only, no dashes.

- Enter your identification number for the identification type you chose in the **Enter your identification number** field.
  - 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 zeroes 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.



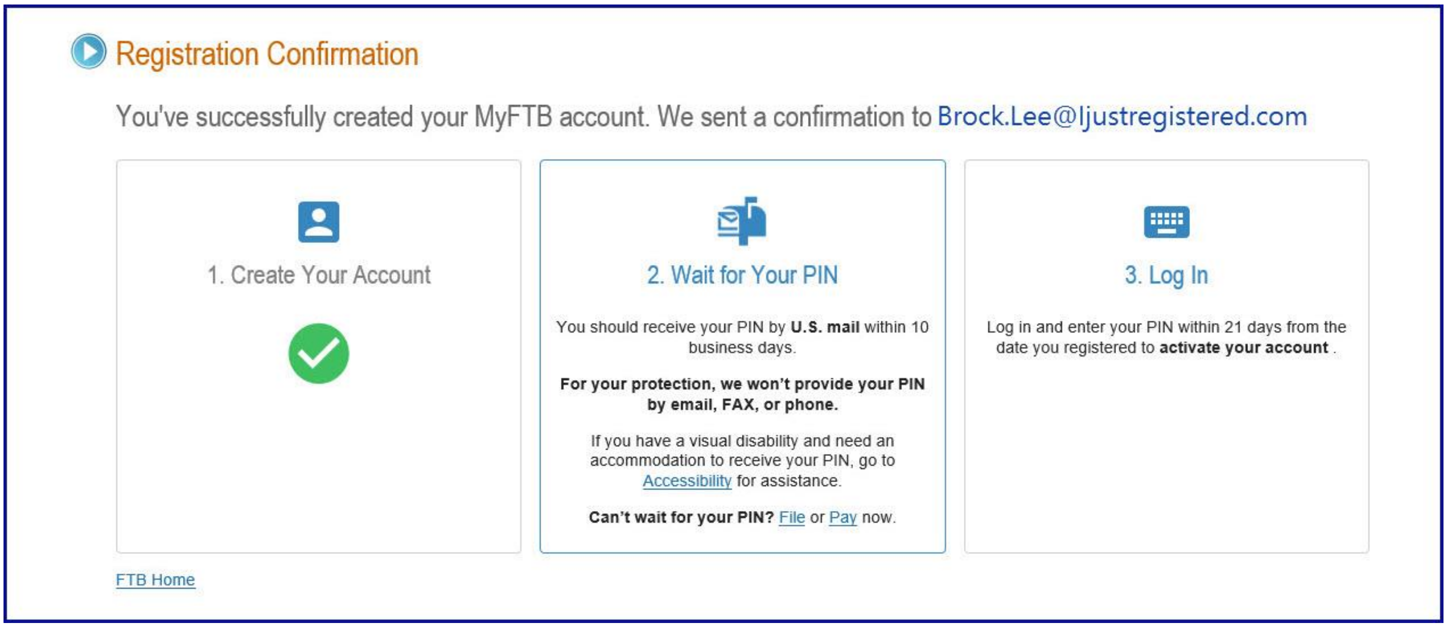
- Read and check the **I hereby certify** box to acknowledge that you understand the guidelines and failure to follow them may result in your account being deactivated and loss or access to MyFTB.



- 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

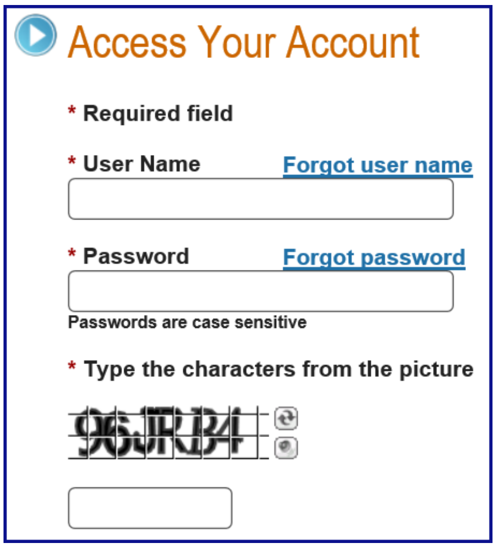
You **must log in and enter your PIN within 21 days from the date you registered** to activate your account. **If you do not**, your PIN will expire and you **must** re-register beginning with Step 1.

- 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 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 in the field below the picture.

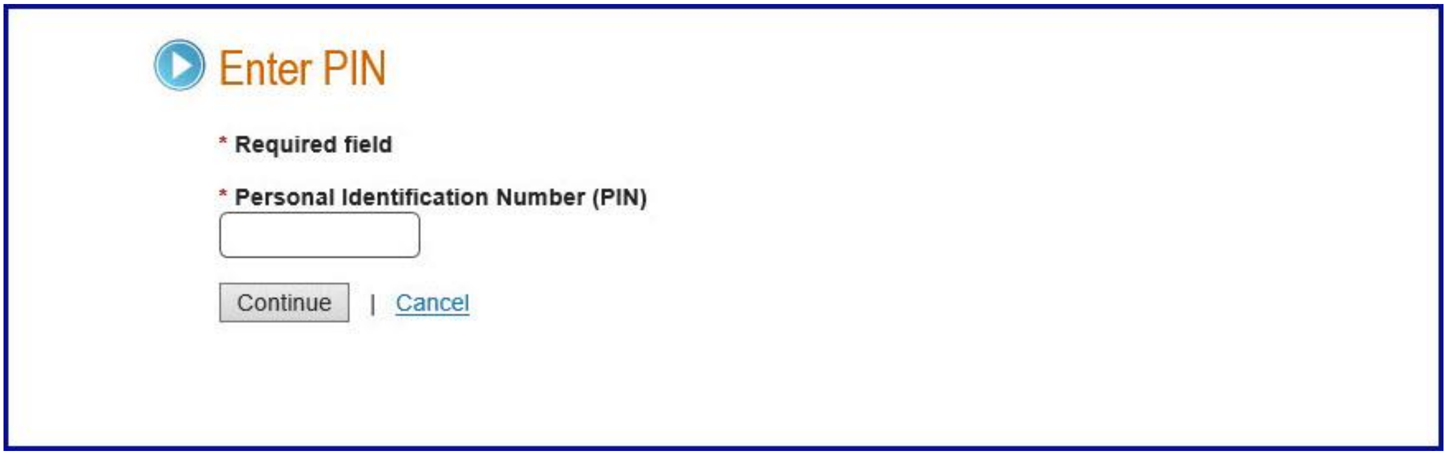


- Select the **Login** button.

Step 11: Enter PIN

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

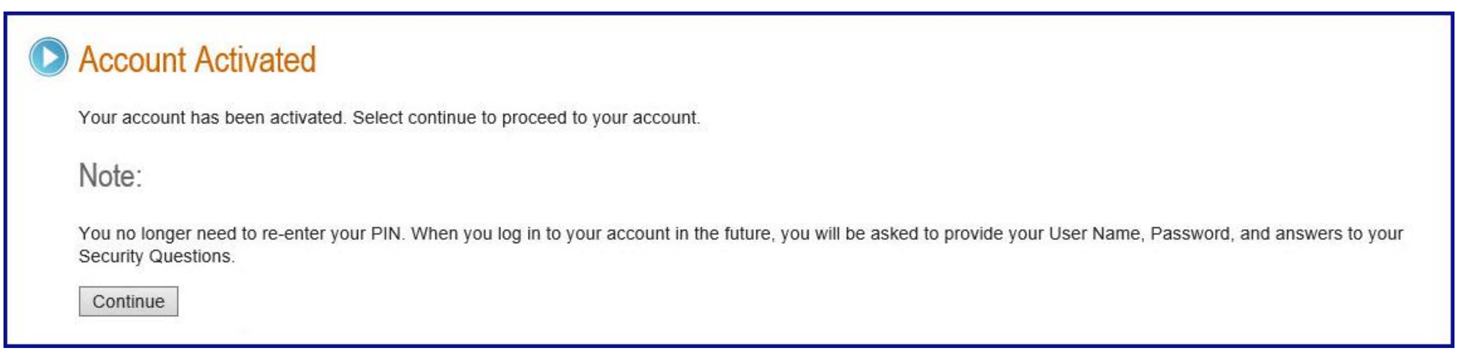


Step 12: Account Activated Confirmation

The **Account Activated** page displays a message to confirm your **MyFTB Tax Professional** 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 Tax Professional** account.



Step 13: View Your MyFTB Tax Professional Account

Your **Tax Professional Overview** page is your homepage that displays every time you log in.

- Your **Tax Professional 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.
    - Provides dropdowns menus with links to your **Client List, Client Notices,** and **Services** and your **Profile.**

      Note: 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.
    - Displays **Quick Links** to content and online services most frequently used by Tax Professionals.
    - **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.