



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

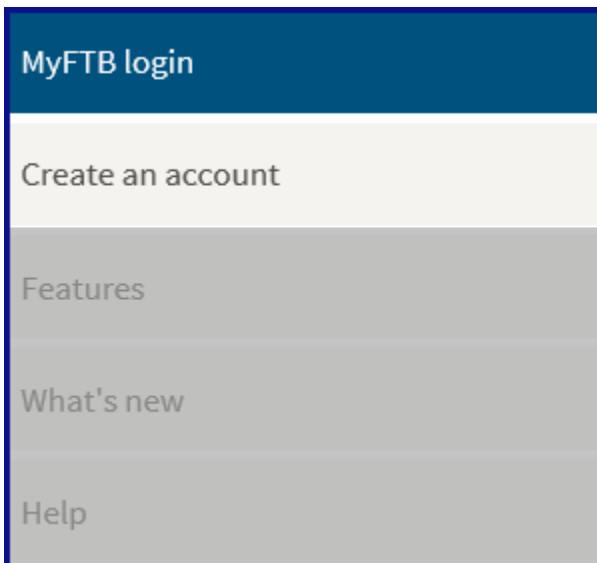
- To create your account, you will need:
 - A valid email address.
 - Your Social Security Number (SSN)
 - One of the listed professional ID numbers:
 - Important!** You must have one of the listed professional ID numbers to register.
 - Preparer Tax Identification Number (PTIN)
 - Enrolled Agent (EA) 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

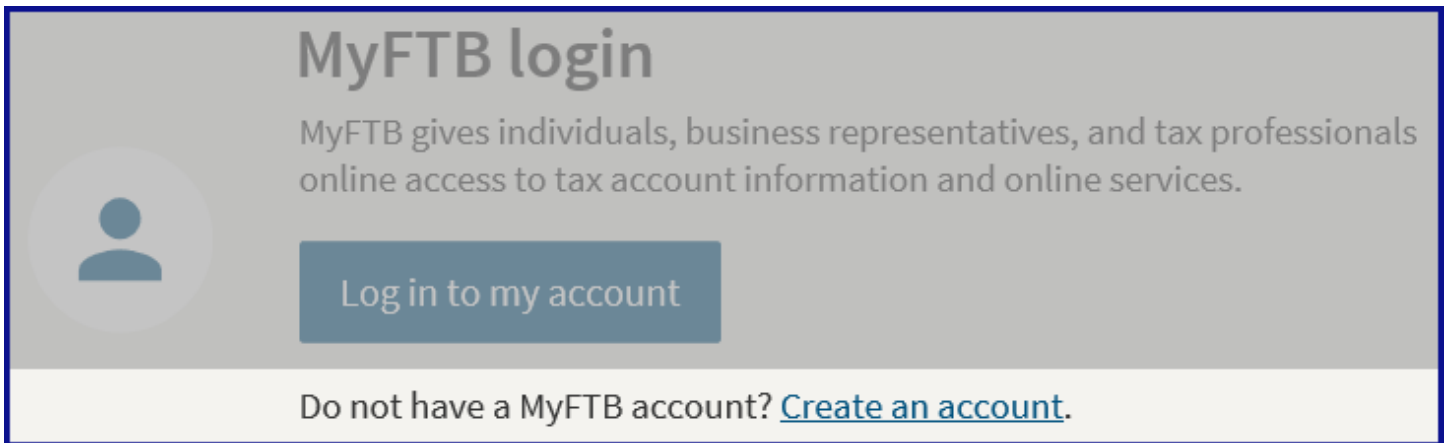
- [Skip to Step 9 to activate](#) your **MyFTB Tax Professional** account.

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.

Create MyFTB account

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** 

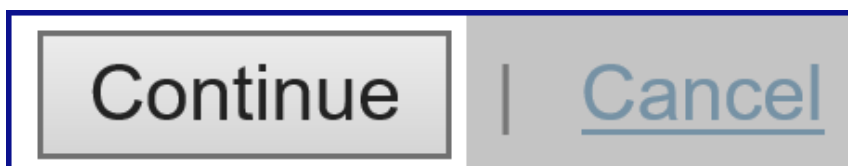
 75 characters maximum

*** 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.

 **Choose Your Role**

Select one role below.

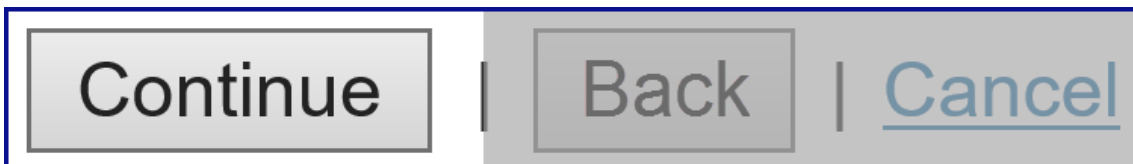
To register additional roles, you must register each role as a separate account using a different user name. We only allow one role per account. Business representatives can add other businesses to their account. Tax Professionals can add clients to their account.

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 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 than 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.

Tax Professional Registration

* All fields required

Brock Lee

Professional Identification

* Select an identification type

* Social Security Number

9 numbers only, no dashes

* Enter your identification number 

- 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.

* I hereby certify:

- I am a Tax Professional authorized by my clients to access their information online via my MyFTB account.
- I protect and **do not** share the User Name and Password I use to log in to MyFTB and view my clients' information.
- I will ensure the computer or device I use to access MyFTB and my clients' information employs common security measures and practices such as:
 - Requiring a User Name and strong Password to access the computer/device.
 - Having current anti-virus software and firewalls installed.
 - Keeping current with security patches.
 - Physically securing the computer/device.

I understand that failure to follow these guidelines may result in my account being deactivated and loss of access to MyFTB.

- Select the **Submit** button.


Submit

Back


Cancel

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](#).


 **Registration Confirmation**

You've successfully created your MyFTB account. We sent a confirmation to Brock.Lee@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**.

[FTB Home](#)

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](#).

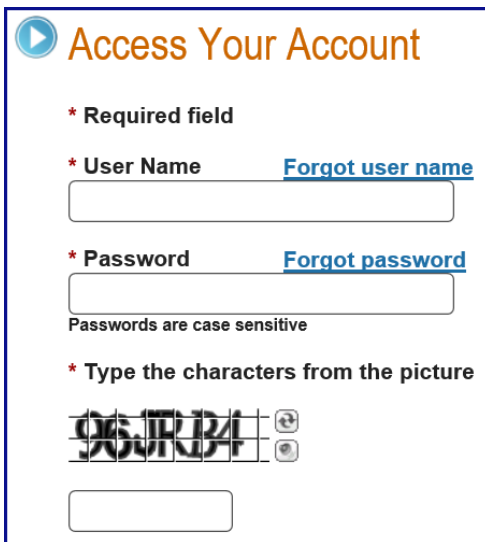
- Select the **Log in to my account** button in the **MyFTB login** section on the **MyFTB account** page.

[Log in to my account](#)

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.



The screenshot shows the 'Access Your Account' login page. It features a blue play button icon and the title 'Access Your Account' in orange. Below the title, there are three required fields: 'User Name' with a 'Forgot user name' link, 'Password' with a 'Forgot password' link, and a CAPTCHA field. The CAPTCHA field contains a grid of distorted characters and two circular icons. A note below the password field states 'Passwords are case sensitive'. An empty input field is provided for the CAPTCHA characters.

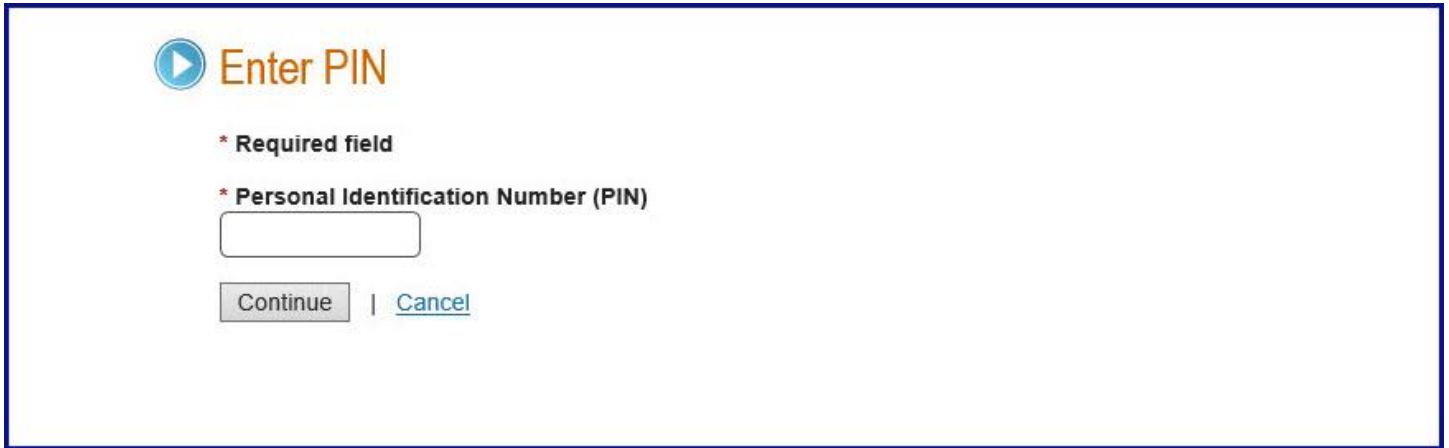
- Select the **Login** button.



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.



Enter PIN

* Required field

* Personal Identification Number (PIN)

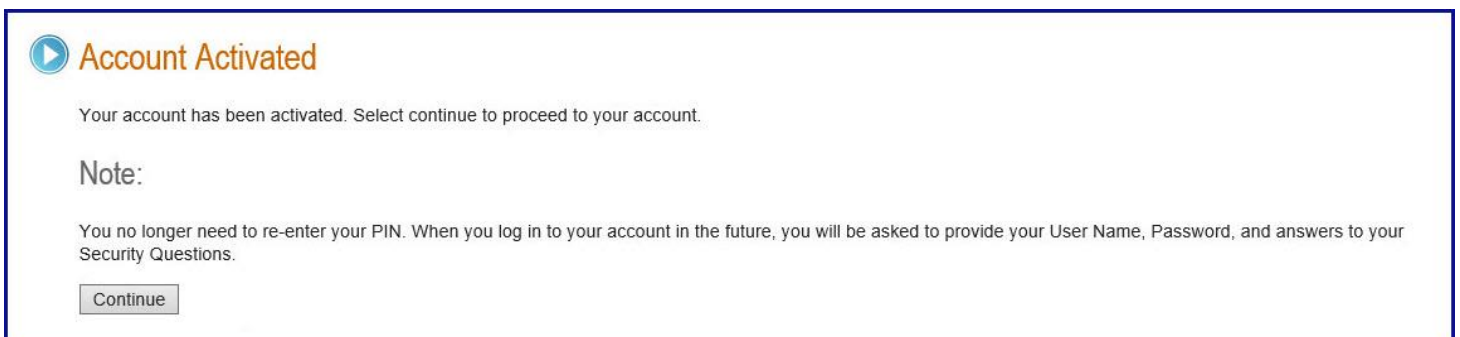
[Continue](#) | [Cancel](#)

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.



Account Activated

Your account has been activated. Select continue to proceed to your account.

Note:

You no longer need to re-enter your PIN. When you log in to your account in the future, you will be asked to provide your User Name, Password, and answers to your Security Questions.

[Continue](#)

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.

The screenshot shows the MyFTB Tax Professional Overview page. At the top, there is a dark blue header with the MyFTB logo on the left and navigation links for 'Contact Us', 'FTB Home', and 'Log Out' on the right. Below the header, a navigation bar contains links for 'Home', 'Client List', 'Client Notices', 'Services', and 'Profile'. The main content area is titled 'Tax Professional Overview' and includes a 'New Features' section with two bullet points. Below this are two boxes: 'Contact Information' and 'Quick Links'. The 'Contact Information' box displays the address '1234 Anywhere Lane, Somewhere, CA 95827-1234' and the email 'MyEmail_Ind@myemail.com', with a link to 'Update Contact Information'. The 'Quick Links' box contains several links: 'View Client List', 'View Client Notices', 'Add Individual TIA Client', 'Add Business TIA Client', 'File a Power of Attorney', 'View Power of Attorney Activity', and 'Update Multiple POA Declarations'. To the right of these boxes is a 'CalFile' section with a 'Start My Return' button and a 'Contact Us' section with a 'Secure Chat' button.