



State of California

Franchise Tax Board

Access Your Account Demonstration

What is Access Your Account?

- Planned for implementation November 2.
- It's what you will use to view your client's tax information (MyFTB Account).
- Replaces CSN (Customer Service Number).
- We will add an Access Your Account link to the ftb.ca.gov home page – in the upper right hand corner.
- There will be two choices – login or register.
- The first time you use the application you will click on the register link.
- You must complete a one-time registration process – it's pretty painless.

What is Access Your Account?

- During registration you will provide us with some information and select a User Name and password.
- Your User Name never changes (unless you decide to change it).
- The IRS requires that you change your password annually – we'll let you know when you need to do that.
- Once you have registered, you will login with your User Name and password.
- You will be presented with the working page that enables you to enter your clients' secrets and view their MyFTB Account information.

Click on the Register link to begin the process



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Access Your Account

* Required field

* User Name

[I forgot my user name](#)

Login

Don't have an account? [Register](#)

Having problems logging in? Check our [FAQs](#).

Obtaining taxpayer account information is the privilege of individual taxpayers or their authorized representatives. Unauthorized access to account information is unlawful as described in Section 502 of the California Penal Code.

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Enter your first and last name, User Name and email address



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New Account Registration

* Required field

* First Name	11 characters maximum	<input type="text"/>
Middle Initial	1 character	<input type="text"/>
* Last Name	13 characters maximum	<input type="text"/>
Suffix (if any)		<input type="text"/>

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

* User Name	Between 4 and 17 characters	<input type="text"/>
* Re-enter User Name		<input type="text"/>

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	<input type="text"/>
* Re-enter Email Address		<input type="text"/>

| [Cancel](#)

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Select three Security Questions and answers

Create Password

IMPORTANT! Do NOT use your browser's back button.
Use the "Back" button at the bottom of each page.

* All fields are required

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.

Select Question

* Question 1

* Answer 1

3 to 17 characters

Clear

* Question 2

* Answer 2

3 to 17 characters

Clear

* Question 3

* Answer 3

3 to 17 characters

Clear

Select your Security Image and Password

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

Security Image

*Choose a security image from the selection box below. We will display the image you select when you log into your FTB account. This confirms that you are on an authorized FTB website.



Please Select an Image

Your Image

Note: You will be able to change your security image at anytime in your user profile.

Password

Your password must be between 8 and 16 characters long, consist of both upper and lower case letters, and have at least one number. No spaces or special characters allowed. Passwords are case sensitive.

[Password Tips](#)

* **Password**

Minimum 8 letters and numbers
Must include both upper and lower case letters

* **Re-enter Password**

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

[Continue](#)

[Back](#)

[Cancel](#)

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Choose your role

Choose Your Role

**IMPORTANT! Do NOT use your browser's back button.
Use the "Back" button at the bottom of each page.**

Select one role below to complete this registration process.

You can register for more than one role using the same user name and email address, but only one role at a time. We request specific information for each role. We suggest you complete registration as an individual first (for your personal account), then go to the Online Services screen to register for additional roles.

You can also create unique user names for each role you create. First, complete this registration process, then go back to the login page to create a new account with a different user name and email address for each new role.

For example: You may want to register as an individual with your personal email address, and then create a second account as a tax professional with your professional email address.

Register me as:



- Individual
- Business Entity
- Individual
- Tax Professional

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Secrets for an Individual role



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Individual User Registration

IMPORTANT! Do NOT use your browser's back button.
Use the "Back" button at the bottom of each page.

* All fields required

Name: JOE HOFFMAN

* Social Security Number

9 numbers only, no dashes

Shared Secret

From a California tax return you filed with us:

* Year of the tax return

* Filing status

* CA Adjusted gross income (AGI) 

Whole numbers only, 9 maximum

.00

* 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.

Submit

Back

Cancel

Secrets for a Business Entity role



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Business Entity Registration

IMPORTANT! Do NOT use your browser's back button.
Use the "Back" button at the bottom of each page.

* All fields required

Name: JOE HOFFMAN

* **Type of company** Select from the list

* **Account number**

* **Phone** 10 numbers () -

Shared Secret

From a California tax return you filed with us:

* **Tax year of the most recent CA tax return filed**

Original return only, not amended returns

* **Tax form type filed for the year you chose**

* **Net Income (Loss) shown on that form**  .00
Whole numbers only

* 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.

Secrets for a Tax Professional role

Tax Professional Registration

IMPORTANT! Do NOT use your browser's back button.
Use the "Back" button at the bottom of each page.

* All fields required

Name: JOE HOFFMAN

Professional Identification

* Select an identification type

* Social Security Number

9 numbers only, no dashes

* Enter your identification number 

<input type="text"/>	<input type="text"/>
PTIN	<input type="text"/>
EFIN	<input type="text"/>
CTEC	<input type="text"/>
CPA	<input type="text"/>

|

| [Cancel](#)

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Secrets match our records



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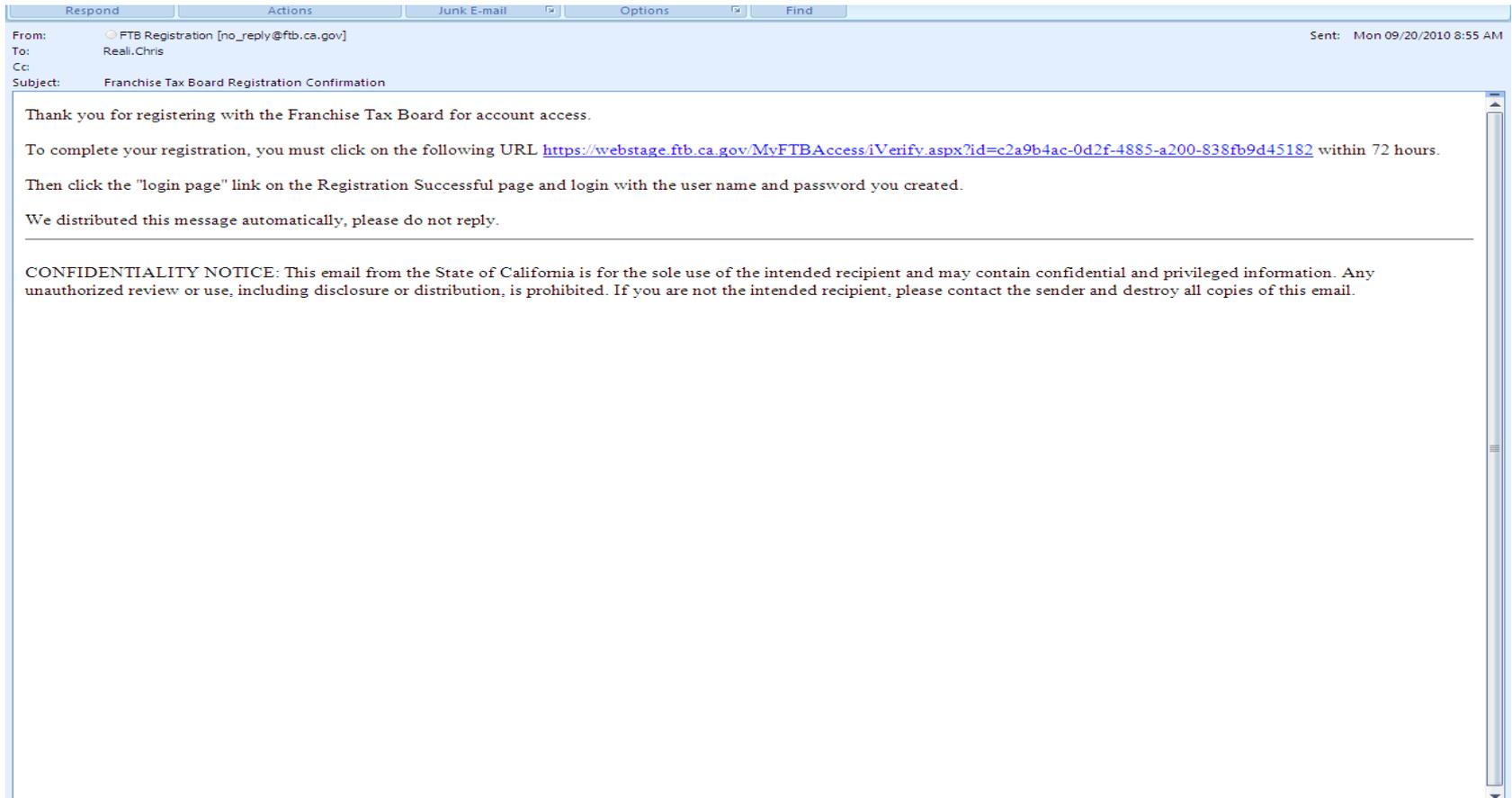
Registration Confirmation

Thank you for registering for Franchise Tax Board account access. We sent a confirmation email to iinnes2010@yahoo.com. You must confirm your registration by clicking the link provided in the email we sent to you within 72 hours.

[Cancel](#)

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We send you an email – you must click on the link to complete registration



Registration is complete!



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Registration Successful

This completes the registration process for Franchise Tax Board account access.

Please wait one minute before going to the [login page](#) to access your account.

[Cancel](#)

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Login with the User Name you selected

Access Your Account

* Required field

* User Name

[I forgot my user name](#)

Login

Don't have an account? [Register](#)

Having problems logging in? Check our [FAQs](#).

Obtaining taxpayer account information is the privilege of individual taxpayers or their authorized representatives. Unauthorized access to account information is unlawful as described in Section 502 of the California Penal Code.

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Your security image displays, if correct enter your password

Enter Your Password

Please confirm your security image is correct. It ensures that you are on the official California Franchise Tax Board website.



If you do not see your security image, do not enter your password. Use the browser back button and try entering your user name again.

Password

Passwords are case sensitive

[I forgot my password](#)

Remember me on this computer.

Do not check this box if you are on a shared or public computer.

| [Cancel](#)

Having problems logging in? Check our [FAQs](#).

Obtaining taxpayer account information is the privilege of individual taxpayers or their authorized representatives. Unauthorized access to account information is unlawful as described in Section 502 of the California Penal Code.

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What you can do as a Tax Professional



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Online Services for Tax Professionals

Name: JOE HOFFMAN
PTIN: *****101

Access Your Client's Account

Individual Business

[View Account Information](#)

Services for Individual Taxpayers

[Check refund status](#)
[Check e-file return status](#)
[Check online installment agreement](#)
[Request a real estate lien payoff](#)
[View all payment options](#)
[Get email estimated tax payment reminders](#)

Additional Services

[Report income tax fraud](#)
[Report a systemic issue](#)
[Subscribe to informational email lists](#)
[Power of attorney declaration](#)
[Request a paper copy of a tax return](#)
[Bills and Notices - What they mean](#)
[Frequently asked questions](#)

[Log Out](#)

Manage My Online Profile

[Change my password, email address, security questions, or security image](#)
[Change to another role](#)
[Add another role](#)

Services for Business Taxpayers

[Get installment agreement information](#)
[Request a real estate lien payoff](#)
[View all payment options](#)

[FTB Home Page](#)

Enter your client's secrets



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Tax Professional - Client Selection

* All fields required

Name: JOE HOFFMAN

PTIN: *****101

IMPORTANT! Do NOT use your browser's back button.
Use the "Back" button at the bottom of each page.

View My Individual Client's Information

To access an account, you must have your client's permission and the following information. We recommend that you have an [Online View Access Authorization](#) signed by each client whose account you view online.

* Client's Last Name

* Client's Social Security Number

* Year of your client's tax return

* Client's filing status for the year you chose

* CA AGI shown on that return Whole numbers only, 9 maximum .00

* 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.

| | [Log Out](#)

Confirm you have entered the correct client secrets



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Tax Professional - Client Confirmation

Name: JOE HOFFMAN
PTIN: *****101

Client's Social Security Number: *****5547
Client's Name: **INNES**

[Continue](#)

| [Select another client](#)

| [Online Services for Tax Professionals](#)

| [Log Out](#)

[FTB Home Page](#)

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Your client's MyFTB Account is displayed



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MyFTB | ACCOUNT Options

Social Security Number: *****5547

KELLEY E INNES

Payment Information

[View estimated tax payments](#)

[View payment history](#)

- * [Make a payment](#)
- * [Apply for an installment agreement](#)
- [View all payment options](#)

Other

[Get estimated tax payment reminders](#)

[Request a paper copy of a tax return](#)

[Subscribe to informational email lists](#)

[View frequently asked questions](#)

- * Additional authentication required

Tax Information

[View account summary](#)

[View wage and withholding information](#)

[View FTB-issued 1099 information](#)

- * [Check refund status](#)
- * [File CA tax return with CalFile](#)
- * [Check ReadyReturn eligibility](#)
- * [Check e-file return status](#)

[Select another client](#)

[Online Services for Tax Professionals](#)

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Session expires in 19:55.

Thank you!

Questions?