



Special Notice

**CALIFORNIA DEPARTMENT
OF TAX AND FEE
ADMINISTRATION**
450 N STREET
SACRAMENTO, CA 95814

EDMUND G. BROWN JR.
Governor

MARYBEL BATJER
Secretary
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Director

CDTFA WEBSITE
www.cdtfa.ca.gov

CUSTOMER SERVICE CENTER
1-800-400-7115
TTY
711

Third Party Access to New Online Services

The California Department of Tax and Fee Administration (CDTFA) is improving its online services. Beginning on May 7, 2018, sales and use tax accounts and some special tax and fee accounts will be moved to the CDTFA's new online system. For more information about this new online services system and a list of tax and fee programs that will be moved, please see special notice [L-523](#), *California Department of Tax and Fee Administration (CDTFA) Changes to Online Services*.

Below are some important details about accessing your account in the new online system when it goes live on May 7, 2018:

Third Party Access:

- Your current User ID and Password will not be valid in our new online system.
- You will need to set up a new Username and Password and request third party online access to your client's account (explained below).
- When the system goes live on May 7, 2018, go to www.cdtfa.ca.gov.
 1. Click the *Login* button.
 2. Scroll down and click *View Accounts*.
 3. Click on *Sign Up Now*.
 4. Select *I am a Third Party Delegate (Tax Preparer/CPA, Representative, Employee, other)*.
 5. Complete the steps to set up a new Username and Password.
 6. Select the *Request Access to an Account* link and follow the prompts.
- Your client will need to approve or modify your request in the new online system to gain access to their account or they can provide you with their security code. A security code will be mailed to your client upon submission of your access request. Please allow seven to ten (7-10) business days for the code to be delivered to your client's business mailing address.
- If your client provides you with their security code, you will need to log in and complete the steps in the *Request Access to an Account* link to gain access to their account.

Third Party Access to New Online Services

Limited Access Code:

- Your client's Express Login Code will still be available for use, in the new system, as a *Limited Access Code*.
- Your client does not need to create a new Username and Password to access the basic online services features with their *Limited Access Code*.
- Relief requests are not available as a *Limited Access Function*. You or your client will need to log in with a Username and Password to submit relief requests.
- To use a *Limited Access Code*, when the system goes live on May 7, 2018, go to www.cdtfa.ca.gov, click the *Login* button, scroll down and click *View Accounts*, and choose from one of the options under the *Limited Access Functions*.
- If your client has not received their security code, by the time their returns or payments are due, you can use their *Limited Access Code* to file their returns and pay the amount due.

Third Party Access - Multiple Accounts:

If you require third party online access for multiple accounts, you will need to submit a separate request for each account or obtain their security codes.

Please note: Each of your clients' accounts will have its own security code.

For more information on the upcoming changes, please see our [online services](#) page or contact our Customer Service Center at 1-800-400-7115 (TTY:711) Monday through Friday, 8:00 a.m. to 5:00 p.m. (Pacific time), except state holidays.