



SPECIAL NOTICE

CALIFORNIA DEPARTMENT
OF TAX AND FEE
ADMINISTRATION
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Secretary
Government Operations Agency

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CDTFA WEBSITE
www.cdtfa.ca.gov

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

Third Party Access to New Online Services Effective November 9, 2020

We are expanding our online services. Beginning November 9, 2020, all the taxes and fees we administer will be included in our new online services system. For a list of tax and fee programs that will be moved in November, please see special notice, [L-744](#), *Our New Online Services System Expands to Include All Tax and Fee Programs*.

If you already have a username and password to login and file for sales and use tax or other account type in our new online services system, you may use your existing login to request access to accounts entering the new system on and after November 9, 2020.

If you do not have a username or password in the new system, you will need to create one. Here are some important details about obtaining access to the new system.

Third Party Access

- 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 November 9, 2020:
 1. Go to www.cdtfa.ca.gov.
 2. Click the *Login* button.
 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 create a 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 online or provide you with their security code. A security code will be mailed to your client upon submission of your access request. Please allow 7-10 business days for the code to be delivered to your client's business mailing address.
 - If your client gives you their security code, you will need to log in and complete the steps outlined in the *Request Access to an Account* link to gain access to their account.

Third Party Access - Multiple Accounts

Each of your client's accounts will have its own security code. If you require third party online access for multiple accounts, you will need to obtain the related security codes or submit a separate request for each account.

For video tutorials on these topics and more information on the upcoming changes, please see our [online services](#) page or call our Customer Service Center at 1-800-400-7115 (CRS:711). Customer service representatives are available Monday through Friday, 8:00 a.m. to 5:00 p.m. (Pacific time), except state holidays.