

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).
- Please set up a new *Username* and *Password* and request access to your client's account **at least** 7-10 business days before their return due date, to ensure you receive the proper access.
- 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)*.
 5. Complete the steps to set up a new *Username* and *Password*.
- Once you have created your *Username* and *Password*, you will need to request access to your client's account. Log in and click on the *Request Access to an Account* link under the *I want To* section.

The screenshot displays the CDTFA Online Services user interface. At the top, there is a dark blue header with the text "CDTFA Online Services" and navigation links for "Settings" and "Log Off". Below the header is a light blue navigation bar with a "Home" link. The main content area is divided into three sections: "Ligon", "Alerts", and "I Want To". The "Ligon" section shows the user's name, email, phone number, and last login date, along with a balance of \$0.00. The "Alerts" section indicates there are no alerts. The "I Want To" section lists several options, with a red arrow pointing to "Request Access to an Account". Below the main content area is a navigation bar with "Accounts" selected, and a message stating "You do not have access to any accounts".

- Indicate you are the third party delegate for your client's account.

Request access to an account Settings Log Off

Home > Request access to an account

1. Welcome

Welcome

How are you related to the business you are requesting to manage?

I am the owner of the business

I am a third party delegate (Tax Preparer/CPA, Representative, Employee, other)

Save Draft Cancel < Previous Next >

- If your client provided you with their security code, you can indicate you have received the code, and gain access to their account. If your client has not provided you with their security code, you will need to request one.

Request access to an account Settings Log Off

Home > Request access to an account

1. Welcome 2. Security Code

Security Code

Have you received a security code for the business to which you are requesting access? No Yes **Required**

Save Draft Cancel < Previous Next >

- You will need to input your client's *Account Type*, *Account Number*, and *Limited Access Code* (formerly known as their Express Login Code).

- Once you submit your request, your client will need to approve or modify the request, in the new online system, if they have set up their own *Username* and *Password*. Your client can also provide you with the security code that was mailed to them upon submission of your request. Please allow 7-10 business days for the code to be delivered to the business mailing address for your client.
- 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. If your client logs in with their *Username* and *Password* and approves your request in the new system, you will have immediate access.
- 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. **Note:** Each of your clients' accounts will have its own security code.