



SPECIAL NOTICE

CALIFORNIA DEPARTMENT
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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 August 12, 2019

The California Department of Tax and Fee Administration (CDTFA) is expanding its online services. Beginning on August 12, 2019, additional special tax and fee accounts will be included in the new online system. For a list of tax and fee programs that will be moved, please see special notice, [L-598](#), *California Department of Tax and Fee Administration (CDTFA) Expands New Online System*.

If you already have a *Username* and *Password* to login and file for Sales and Use Tax, eWaste, and/or Tire Fee account, you may use your login to request access to the special tax and fee accounts entering the new system on and after August 12, 2019.

If you need to create a *Username* and *Password* in the new system, below are some important details about obtaining access to online services.

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 August 12, 2019, go to www.cdtfa.ca.gov.
 1. Click the *Login* button.
 2. Click on *Sign Up Now*.
 3. Select *I am a Third Party Delegate (Tax Preparer/CPA, Representative, Employee, other)*.
 4. Complete the steps to set up a new *Username* and *Password*.
 5. 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 - 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 separate security code.

For More Information

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