



Special Notice

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

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Director

CDTFA WEBSITE
www.cdtfa.ca.gov

CUSTOMER SERVICE CENTER
1-800-400-7115

TTY
711

Changes to Online Services Effective May 7, 2018

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 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:

Logging In:

- Your current User ID and Password will not be valid in the new system.
- To access to your account, you need to set up a new Username and Password.
- 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. You will be prompted to enter or request a security code. Please request a security code and allow seven to ten (7-10) business days for the code to be delivered to your business mailing address.
- Once you receive your security code, you will return to www.cdtfa.ca.gov and repeat the steps above to set up a new Username and Password and access your account.

Limited Access Code:

- Your Express Login Code will still be available for use, in the new system, as a *Limited Access Code*.
- You do not need to create a new Username and Password to access your account's basic online services features with your *Limited Access Code*.
- Relief requests are not available as a *Limited Access Function*. You will need to log in with your 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 you have not received your security code, by the time your return or payment is due, you can use your *Limited Access Code* to file your return and pay the amount due.

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Third Party Access:

- Your third party representative (tax preparer/CPA, representative, employee, other) will also need to set up a new Username and Password, *and* request third party online access to your account.
- You will need to approve or modify the request through the new online services system or provide your representative with your security code (described above) to access your account.
- If you have not received a security code, one will be mailed to you upon submission of your representative's request for third party online access. Please allow seven to ten (7-10) business days for the code to be delivered to your business mailing address.

Note: Approval of any online access requests will provide your third party representative with viewing capabilities to your account and limited account maintenance. This capability allows for viewing of payments, returns filed, addresses, and all other accounted-related information. Viewing capability pertains only to your account and does not allow for viewing of personal or ownership information.

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.