

How to access your clients' existing accounts as a third-party tax professional.

Starting in November 2021, tax professionals can use the Philadelphia Tax Center to pay and file tax returns online on behalf of their clients. As a third-party professional, the new website allows you to:

- Log in with your own username and password, and
- Manage multiple clients from a single dashboard.

You only need **one** username to manage multiple clients and your own tax accounts. Follow these steps to start using the Philadelphia Tax Center and request access to an existing client's accounts. Please note that to protect taxpayers' information, the registration process can take 5-10 business days.

1 Go to the Philadelphia Tax Center (<https://tax-services.phila.gov>)

- Under the "Existing taxpayers" panel on the homepage, select "Create a username and password."
- A welcome page appears; select "Next."
- The system asks, "Are you a third party tax professional?"; select "Yes" and "Next."
- Enter the required Contact and Login information; select "Next."
- Check your Registration summary; select "Submit."

2 Request access to a client's existing account(s)

- Return to the homepage and Log in using the username and password you created.
- Set up two-step authentication through your mobile device or email; select "Confirm."
(Download the Google Authenticator app on your smartphone to use a mobile device)
- Under your name (near top right of the screen) find and select "Accountant Center."
- Under "Third party access," select "Request taxpayer access," then enter your client's Federal Employer ID or Social Security Number, and their Full Legal Name; select "Next."
- Check the client's tax types you need to access (you can pick more than one); select "Next."
- Choose an Access Level (File returns, View, etc.) for each tax type; select "Next."
- Review the Account(s) summary page; select "Submit."
- The system sends a physical Access Letter to the client's address on file. You will request an Access Letter only once for each client. The letter can take 5-10 business days to arrive. While waiting for the Access Letter, you can pay as guest from the "Payments" panel on the homepage.

3 Access a client's account(s)

- Once the letter arrives, your client can share the Letter ID on the Access Letter with you.
- Return to the homepage and Log in with your username, password, and two-step authentication.
- Under your name, select "Accountant Center," and find the panel "Third party access."
- Select "Verify taxpayer access," then type in the Letter ID your client shared; select "Submit."
You now have access to your client's account(s). Repeat steps 2 and 3 for each of your clients.

If you have questions about using the Philadelphia Tax Center, visit:
www.phila.gov/guides/philadelphia-tax-center or call (215) 686-6600.