

How to register a new Philadelphia client who has no existing tax account.

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 to register clients who are new taxpayers in Philadelphia. Please note that to protect taxpayers' information, the registration process can take 5-10 business days.

1 Register yourself as a third party tax professional

If you already have a username and password for this website, go directly to Part 2.

- 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."
- Under the profile icon in the top right of the screen, select "Log off," then go to the homepage.

2 Register your client (does not have an existing Philadelphia tax account)

- Under the "Register a new taxpayer" panel on the homepage, select "Register a new taxpayer."
 - Under "Are you a third party tax professional registering on behalf of your client?"; select "Yes."
 - Enter your client's Entity, Tax type, ID and Name, NAICS, and Mailing Address information.
 - Under "Create a username," the system asks "Do you need to create a new username to manage your accounts or your client's accounts online?" select "No," and "Next."
 - Enter your client's Contact information, then select "Next."
 - Review the summary, check the box to confirm registration, and select "Submit."
- The system sends you to the homepage.

3 Request letter and access your client's account(s)

- Log in. Under your name, find and select "Accountant Center."
Under the panel "Third party access," select "Request taxpayer access."
 - Enter your client's FEIN or Social Security Number, and their Full Legal Name; select "Next."
 - Check the client's tax types and the Access Level you need (File returns, View, etc.) for each tax type.
 - Review the Account(s) summary page; select "Submit."
 - 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.
 - Select "Accountant Center," then 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).