

Third-party access (CPAs, tax professionals, bookkeepers, etc.)

How do I gain access to my client's tax account(s)?

First, you must create your own username and password, THEN you will be able to log in and request access to your client's account(s). Please note that verifying an existing tax account can take a week or more. To keep tax information safe, we mail a physical letter as part of the verification process.

1. **To create your username and password:** Go to the [Philadelphia Tax Center's](https://tax-services.phila.gov) homepage (<https://tax-services.phila.gov>). Under the "Existing taxpayers" panel on the homepage, select "Create a username and password," and Yes to the question "Are you a third party tax professional?" Follow the on-screen prompts to complete your own registration.

2. **To request access to your client's account(s):** Log back in from the homepage, and find the "Accountant Center" under your name. Find the panel "Third party access," select "Request taxpayer access," and enter a client's FEIN or SSN, and their Full Legal Name. The name must match our records exactly. Follow the on-screen prompts to request an Access Letter. We will mail a physical letter to your client's mailing address, which can take 5-10 days to arrive.

3. **To finish your request:** Get the "Letter ID" printed on the letter we sent to your client. Log back in from the homepage. Select "Accountant Center," find the "Third party access" panel, select "Verify taxpayer access," and type in your client's Letter ID.

Restart from step 2 to request access from more clients.

The site says: 'Cannot verify the ID provided' when I request access to a client's account. What do I do?

The Social Security Number or Federal Employer ID number, as well as the Full Legal Name, you enter must match exactly what we have in our records.

First, check you have correctly entered the numbers and name, without typos. There is a good chance that the name of the business has a slightly different spelling in our system. To get the exact spelling of the Full Legal Name in our records, call (215) 686-6600.

Do I have to log into Philadelphia Tax Center to make a payment on behalf of a client?

No. You can always pay online without a username and password. Go to the Philadelphia Tax Center's homepage. Under the "Payments" panel, choose "Pay by eCheck (no fee)" or "Pay by credit card (fee)". You can pay bills by entering the Letter ID found on a bill, or by entering a client's FEIN, SSN, or PHTIN.

I'm trying to pay without logging in. There are four types of payments, which one do I choose?

You can make payments without a username and password. But you must choose what kind of payment to make: Period payment, Account payment, Bill notice payment, or Taxpayer payment. Your choice determines where the payment is directed. Here is what each option means:

- **Period payment:** Use to direct your payment to a single tax account and filing period. This is what you would choose for an estimated payment.
- **Account payment:** Use to pay a delinquent balance on a single tax account (Example: Net Profits Tax) over multiple tax periods. Use Period payment instead if your payment needs to go to a single filing period, such as a specific tax year.
- **Bill notice payment:** Use to pay a bill that you received in the mail. You will need the Letter ID at the top right of the bill.
- **Taxpayer payment:** Use to pay a balance across multiple tax accounts and periods.

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My client has a verified username and password already. Can they approve my access online, without a verification letter?

Yes, but you must have your own username and password for the Philadelphia Tax Center too. See the instructions above to create a username and password as a third party tax professional.

Log in from the homepage. Under your name, select "Accountant Center," find the "Third party access" panel, and select "Request taxpayer access." Once you request access, your client must grant it.

They must log in separately, and from the "Action Center" tab approve the notification for your request.

My client received a letter from the Department of Revenue. Can I respond to the letter online?

Yes. You do not need a Philadelphia Tax Center login to respond to most letters.

On the [Philadelphia Tax Center](#)'s homepage, find the "Submissions" panel, and select "Respond to a Letter." Next, enter the Letter ID, which can be found on the top right corner of the letter.

Can I request a payment agreement on behalf of my client online?

Yes, you can request a payment agreement in the Philadelphia Tax Center, and on behalf of your client.

Log in from the homepage. Under your name, select "Accountant Center," find the "Payments and returns" panel, and select "Request Payment Agreement."

The website will walk you through the steps to request a payment agreement.

Can I update my client's tax account information, such as an address, online?

No. Your client must update account information themselves in the Philadelphia Tax Center.

To do so, they must log in from the homepage, and select the "More Options..." tab, find the "Names and Addresses" panel, and select the "Manage Names and Addresses" link.

Select their name or address, then "Change this name/address," and enter a new name or address.

What services can I complete on behalf of my client in the Philadelphia Tax Center?

You can:

- View balances, file returns, and make payments.
- Apply for tax credits and request payment agreements.
- View electronic messages and letters to and from the Department of Revenue.
- Manage payments and returns.
- Upload W-2s and 1099s, as well as audit attachments.

What services am I NOT allowed to complete on behalf of my client online?

You cannot:

- Update or manage their names and addresses.
- Manager third party and secondary logons on the client's account.
- Add or close client accounts.
- Request a waiver of your client's interest and penalties.

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Can multiple people have access to the same account?

Yes. For example, two or more accountants working for the same firm can access one client's accounts, or multiple clients' accounts. Each accountant will use their own username and password to do this. This is called a "secondary logon."

However, a secondary logon can only be added by the "primary" user, or the original login created for the taxpayer's accounts. To create a secondary logon, the primary user must:

Log in to the Philadelphia Tax Center, select the "View Profile Menu" icon, and select "My profile." Select the "More options..." tab, find the "My users" panel, and select "Manage secondary logons." Select "Add," and follow the on-screen prompts to provide new user information and access levels.

An email will be sent to address you provided with instructions to finalize the secondary logon.