Philadelphia Tax Center

How to add a secondary user (logon), when more than one person needs to manage a tax account

Starting in November 2021, taxpayers can use the Philadelphia Tax Center to pay, file and amend tax returns online. Taxpayers can also grant access to other people who need to view or manage their accounts, but who may or may not be, a third party. This is called adding a secondary user, or logon.

For example, a business owner may want account access for both herself and her bookkeeper. Another example is a tax firm, where several accountants may work on one client's finances.

A secondary user can only be added by the "primary" user, or the original username created for a tax account in the Philadelphia Tax Center. The primary user can also control the secondary user's access level. Based on the access level granted, a secondary user may only file returns, or only view certain tax types. A secondary user can also be granted full access. To create a secondary user:

1   **Create a username and choose access levels**

Go to the web address **tax-services.phila.gov** (no "www") and log in using your username and password.
Select the **"View Profile Menu"** icon 😊 at the top right of the screen, and the option **"My profile."**
In the Manage my profile screen, select the **"More options…"** tab. Under the "**My users panel"**, select **"Manage secondary logons."**

In the Secondary logons screen, select **"Add."** The site prompts you to:

- Create a username and provide the name of the secondary user.
- Provide and confirm the secondary user's emails address.
- Choose the access type and level for the secondary user.
- (Uncheck the tax account types the secondary user should not have access to. By default all tax account types are displayed).

The system sends an email to the address you provided, with further instructions for the secondary user to log in.

2   **Add security groups**

By default, all secondary users receive access to all of the accounts selected upon creation of a username. However, the primary user can create security groups to designate access to only certain accounts. To add a security group:

Go to the web address **tax-services.phila.gov** (no "www") and log in using your username and password. Select the **"View Profile Menu"** icon and the option **"My profile."**
In the Manage my profile screen, select the **"More options…"** tab.
Under the **"My users panel"**, select **"Manage secondary logons."**
Select the Security groups tab, and **"Add."** The site prompts you to:

- Create a name and description of the security group (For example, "BIRT only").
- Return to the Secondary logons screen. Select the Secondary logons tab. Select the username of the secondary user. Under the Security groups panel, select "Change" and check box for the security group you just added. In the Account access panel, check the account(s) that should be included in this access.

The security group is now set up for the secondary logon.

*****Tip:** *to return to managing your tax information, click the business name that appears below the City of Philadelphia logo at the top left of your screen.*