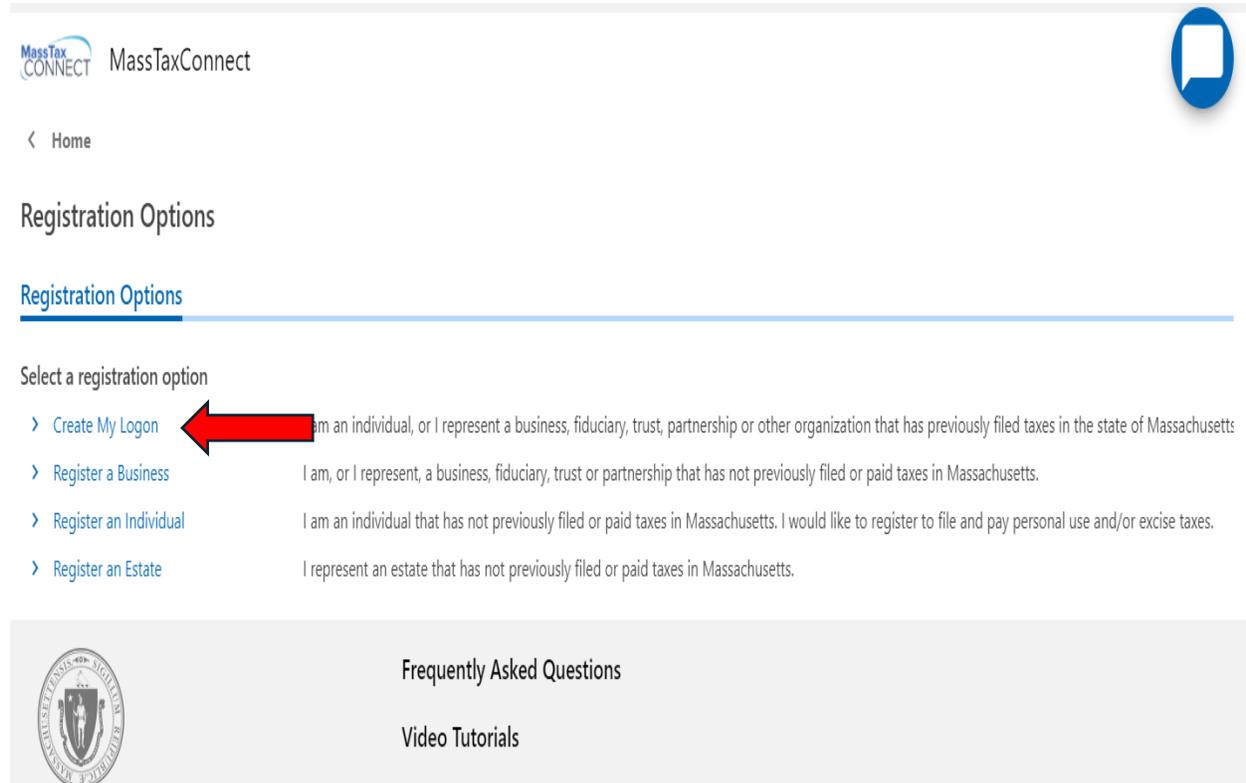


# How an Individual Taxpayer Can Create a MassTaxConnect Logon Account.

This document will walk you through the process of creating an account in MassTaxConnect if you are not a business and have previously filed individual income tax returns in MA.

Next, select **Create My Logon**.



The screenshot shows the MassTaxConnect website interface. At the top left is the MassTaxConnect logo. To the right is a blue speech bubble icon. Below the logo is a navigation link for 'Home'. The main heading is 'Registration Options', with a sub-heading 'Registration Options' underlined. Below this, the text 'Select a registration option' is followed by a list of four options. A red arrow points to the first option, 'Create My Logon'. The other options are 'Register a Business', 'Register an Individual', and 'Register an Estate', each with a brief description of the user type.

MassTaxConnect

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## Registration Options

### Registration Options

Select a registration option

- > **Create My Logon** ← I am an individual, or I represent a business, fiduciary, trust, partnership or other organization that has previously filed taxes in the state of Massachusetts.
- > Register a Business I am, or I represent, a business, fiduciary, trust or partnership that has not previously filed or paid taxes in Massachusetts.
- > Register an Individual I am an individual that has not previously filed or paid taxes in Massachusetts. I would like to register to file and pay personal use and/or excise taxes.
- > Register an Estate I represent an estate that has not previously filed or paid taxes in Massachusetts.

Frequently Asked Questions

Video Tutorials

From the MassTaxConnect homepage, select **Sign Up** in the upper right-hand side of the page.

MassTaxConnect

Due dates for some business taxpayers have been extended. These changes are not reflected in your MassTaxConnect accounts. See [DOR's COVID-19 response](#) for the latest information.

Username

Password

Log in

[Forgot username or password?](#)

New to MassTaxConnect?  
[Sign Up](#)

Find on this page

Select the **button** next to **I am an individual who has previously filed taxes in the state of Massachusetts**. Before continuing, read the requirements that you need to have on hand.

MassTaxConnect

< Registration Options

Request to Create an Online Account

[Request to Create an Online Account](#)

Taxpayer Type

Select one of the options below to continue.

I represent a business or organization that has previously filed taxes in the state of Massachusetts. I will validate my business by supplying

- My business/organization FEIN/SSN AND
- One of the following:
  - Amount due from one of the last three returns
    - Zero return amount cannot be used for authentication
  - Amount to be refunded from one of the last three returns
  - Letter ID from the letter I received informing me about signing up for MassTaxConnect
  - Line item detail from one of the last three returns (Net Income on Form 63-FI for Financial Institution Excise or Total Assets on Forms 355, 355S or 355S8C for Corporate Excise. Net Income on Form M-990T-62 or 3M for Unrelated Business Income)

Only use this request if you've already filed a return. If you would like to register a new business, [register here](#).

I am an individual who has previously filed taxes in the state of Massachusetts. I will validate my income by supplying

- My SSN/ITIN AND
- One of the following:
  - Amount due from one of the last three returns
    - Zero return amount cannot be used for authentication
  - Amount to be refunded from one of the last three returns
  - Letter ID from the letter I received informing me about signing up for MassTaxConnect
  - Line item detail from one of the last three returns

Only use this request if you've already filed a return. If you would like to register a new taxpayer for personal use or excise taxes, [register here](#).

Personal income tax returns cannot be filed on MassTaxConnect. [Learn more about income tax filing options.](#)

Cancel Previous Next

Choose the **ID type** and confirm the ID you chose. Select **Personal Income Tax** as the account type. Select the information you are going to provide. You can choose to add the letter ID from a letter you received but for this example, we are choosing a tax return amount from one of the past three tax returns filed. The amount must be greater than zero dollars.

Line item detail from one of the last three returns (Net Income on Form 990-P for Financial Institution Excise or Total Assets on Forms 552, 552S or 552SBE for Corporate Excise; Net Income on Form M-990T-62 or 3M for Unrelated Business Income)

Only use this request if you've already filed a return. If you would like to register a new business, [register here](#).

**I am an individual who has previously filed taxes in the state of Massachusetts.** I will validate my income by supplying

- My SSN/ITIN AND
- One of the following:
  - Amount due from one of the last three returns
    - Zero return amount cannot be used for authentication
  - Amount to be refunded from one of the last three returns
  - Letter ID from the letter I received informing me about signing up for MassTaxConnect
  - Line item detail from one of the last three returns

Only use this request if you've already filed a return. If you would like to register a new taxpayer for personal use or excise taxes, [register here](#).

Full-year resident taxpayers who have previously filed a Massachusetts income tax return can now file a Form 1 on MassTaxConnect. [Learn more about income tax filing options.](#)

### Taxpayer Identification and Account Type

ID Type: \_\_\_\_\_ SSN

ID: \* \_\_\_\_\_ Required

Confirm ID: \* \_\_\_\_\_ Required

Select an account type: \_\_\_\_\_ Required

**Select an account type that you have already filed a return for.** If you have not filed a return and don't have an ID and Account Type yet, please click the **Cancel button** and use **New Taxpayer Registration** instead.

If you have only zero returns (no refund and no tax due) for the past 3 years or if you have none of the listed account types, please call the Department of Revenue at 1-617-897-6367 or toll free at 1-800-392-6089 for assistance in creating your username.

Which of the following are you going to provide?

A tax return amount from 1 of the past 3 filed returns. The amount must be greater than \$0.

The letter ID from the letter you received informing you about signing up for MassTaxConnect.

Amount: \* \_\_\_\_\_ Required



Choose how you will provide the information, for our example we are selecting a tax return OR refund amount. We will then select **Tax Return Amount** and choose **Next**.

**Taxpayer Identification and Account Type**

ID Type:  SSN

ID:  \*\*\*-\*\*-6789

Confirm ID:  \*\*\*-\*\*-6789

Select an account type:  Personal Income Tax

*Select an account type that you have already filed a return for. If you have not filed a return and don't have an ID and Account Type yet, please click the **Cancel** button and use **New Taxpayer Registration** instead.*

*If you have only zero returns (no refund and no tax due) for the past 3 years or if you have none of the listed account types, please call the Department of Revenue at **1-617-887-6367** or toll free at **1-800-392-6089** for assistance in creating your username.*

Which of the following are you going to provide?

A tax return amount OR a tax refund amount from 1 of the past 3 Personal Income Tax filed returns. The amount must be greater than \$0.

The letter ID from the letter you received informing you about signing up for MassTaxConnect.

Which would you like to provide?

Tax Return Amount

Refund Amount

Income Tax After Credits

Amount:  100.00

How do I find this amount?

On this page you will be creating a MassTaxConnect online profile. Enter the full name of the person who will be using the account as well as a phone number, four-digit pin, and email address. Once you have completed this select **Next**.

MassTaxCONNECT MassTaxConnect

< Registration Options

Request to Create an Online Account

[Request to Create an Online Account](#)

Taxpayer Type Taxpayer ID and Account Verification Type Tax Amount Profile Information

**Create Your MassTaxConnect Online Profile**

The following information is required to create your MassTaxConnect online profile.

Name:  LARRY MO

Phone country:  USA

Phone type:  Cell

Phone number:  (111) 111-1111

Create a 4-digit PIN:  1234

E-mail address:  goodelmo@dor.state.ma.us

Confirm e-mail:  goodelmo@dor.state.ma.us

Follow the suggestions for creating your **username** and **password**. Select a **security question** and **answer** and choose **Next**.

MassTaxCONNECT MassTaxConnect

< Registration Options

### Request to Create an Online Account

Request to Create an Online Account

Progress: User Type (complete), Taxpayer ID and Account (complete), Verification Type (complete), Tax Amount (complete), Profile Information (complete), User Logon Setup (current)

#### Create Your MassTaxConnect Online Profile

A Master Administrator exists for your company. You will be made a Tax Administrator on this taxpayer, with only access to the account that you provided verification information pertaining to. To either be granted access to additional accounts or be changed to a Master Administrator, contact an existing Master Administrator of your company. Contact information will be e-messaged to you and will be available after you have logged in.

**Usernames must:**

- be between 3-60 characters.
- contain no spaces

**Passwords must:**

- be between 8-15 characters.
- contain at least one upper case letter.
- contain at least one lower case letter.
- contain at least one number.

Username:

Password:

Confirm Password:

Select a secret question and type in the appropriate answer below. This question will be asked in the event you need to recover your password as a means of identity verification.

Question:

On this screen, we want to know if you are a tax professional that will need to set up access to other taxpayers' accounts. Since you are not a tax professional, you will leave the box empty and select **Next**.

MassTax CONNECT MassTaxConnect

< Registration Options

### Request to Create an Online Account

[Request to Create an Online Account](#)

1 Land and Account 2 Verification Type 3 Tax Amount 4 Profile Information 5 User Logon Setup 6 Profile Access

#### Create Your MassTaxConnect Online Profile

If this MassTaxConnect online profile will have access to multiple client taxpayers in order to file, pay or otherwise manage client accounts through MassTaxConnect, check this box for access to the Manage My Clients link and the ability to manage multiple client accounts from a single view.

[Cancel](#) [Next >](#)

Frequently Asked Questions  
Video Tutorial

Once you have read through the Terms of Use agreement, select the box that reads **I agree** and then select **Next**.



< Registration Options

### Request to Create an Online Account

#### Request to Create an Online Account



#### Terms of Use Agreement

As an Individual taxpayer, I hereby agree to the following terms and conditions governing the use of the Massachusetts Department of Revenue's (DOR) MASSTAX CONNECT:

I certify that the Social Security Number (SSN) that I have provided is in fact mine.

I certify that the tax information I have provided is from my personal tax return.

My MassTaxConnect username and password (MassTaxConnect Credentials) will be issued to me exclusively for the purpose of enabling me to conduct MassTaxConnect tax functions with DOR.

I must keep my MassTaxConnect Credentials confidential, and not knowingly allow anyone else to use them for any reason.

I will immediately report to the DOR any information that would lead a reasonable person to believe that someone else other than me had obtained access to my MassTaxConnect Credentials.

I understand and agree to the Terms of Use outlined above regarding the use of my MASSTAX CONNECT Credentials.

I agree

Cancel



Next >

Once you have confirmed that everything you entered on the previous pages is correct, Select **Submit**.



< Registration Options

### Request to Create an Online Account

#### Request to Create an Online Account



#### Registration Summary

Confirm this information is accurate and then use the **Submit** button to submit your online account request. If you notice something was entered incorrectly, use the **Previous** button and correct it before submitting.

##### Login Information

Name: LARRY MO

Username: good.elmo

Phone Number: (111) 111-1111

Email Address: goodelmo@dor.state.ma.us

Cancel



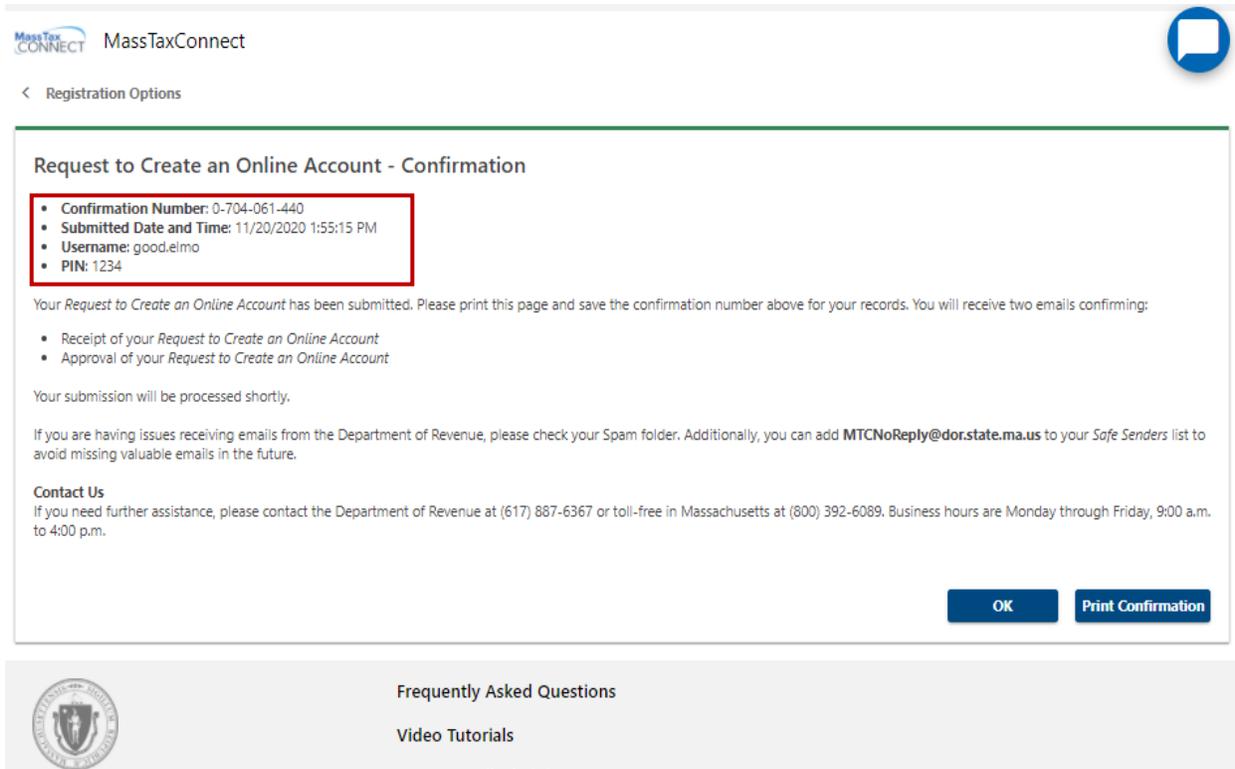
Submit



Frequently Asked Questions

Video Tutorials

On the confirmation screen you will notice the confirmation number, the username, and the pin. For security purposes, we will send you an email with a link to an authentication code that you will use only once during your initial login.



MassTaxCONNECT MassTaxConnect

< Registration Options

### Request to Create an Online Account - Confirmation

- **Confirmation Number:** 0-704-061-440
- **Submitted Date and Time:** 11/20/2020 1:55:15 PM
- **Username:** good.elmo
- **PIN:** 1234

Your *Request to Create an Online Account* has been submitted. Please print this page and save the confirmation number above for your records. You will receive two emails confirming:

- Receipt of your *Request to Create an Online Account*
- Approval of your *Request to Create an Online Account*

Your submission will be processed shortly.

If you are having issues receiving emails from the Department of Revenue, please check your Spam folder. Additionally, you can add **MTCNoReply@dor.state.ma.us** to your *Safe Senders* list to avoid missing valuable emails in the future.

**Contact Us**  
If you need further assistance, please contact the Department of Revenue at (617) 887-6367 or toll-free in Massachusetts at (800) 392-6089. Business hours are Monday through Friday, 9:00 a.m. to 4:00 p.m.

[OK](#) [Print Confirmation](#)

 [Frequently Asked Questions](#)  
[Video Tutorials](#)  
[Terms and Conditions](#)

You have now completed creating your logon credentials. You will receive a confirmation for your MassTaxConnect logon via the email address that you provided earlier. Select the hyperlink in the email that says **Activate** and log into your account.

Received: Friday, Nov 20, 2020 1:55:16 PM

Subject: Registration Approved

Congratulations LARRY MO. Your *Request to Create a MassTaxConnect Account* has been approved for username **good.elmo**. Your confirmation number for this request is 0-704-061-440. You may now login with the username and password you chose at the time of your registration.

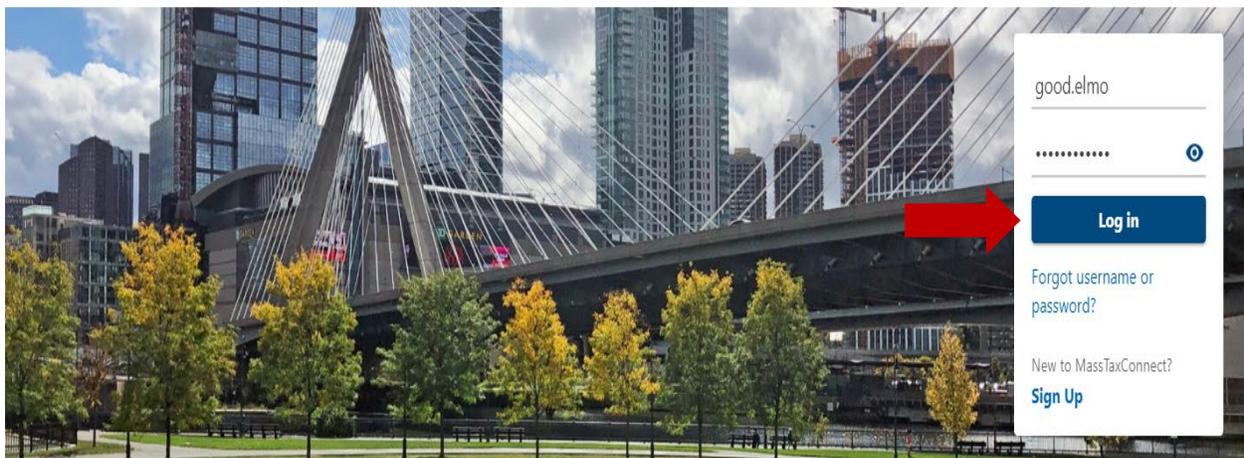
[Activate and log into your account.](#)

Some email programs or security software may prevent the link above from opening. In that case please copy and paste the following URL into your browser's address bar:

<https://genisys-testing.dorfsmain.ad.dor/RDT/mtc/>

The first time you login, you will be required to set up two step verification.

You will be returned to the MassTaxConnect home screen. Choose **Log in**.



[Find on this page](#)



In the next screen you will have the option of how you will be setting up your **two-step verification**.



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## Protect your MassTaxConnect account with two-step verification

Two-step verification is used to better protect your MassTaxConnect account. Once you set it up, you'll be asked to provide a unique security code to verify your identity each time you access your MassTaxConnect account from a device we don't recognize. You must set up two-step verification using one of the options below. Your verification options can be updated at any time through the Manage My Profile link.

<p> <b>Authentication App</b></p> <p>Use an authentication app, such as Google Authenticator, to get security codes.</p> <p><a href="#">Set Up</a></p>	<p> <b>Text Message</b></p> <p>Receive security codes by text message.</p> <p><a href="#">Add Phone</a></p> <p>Message and data rates may apply. To stop receiving SMS messages, remove your number above.</p>	<p> <b>Email</b></p> <p>Receive security codes by email.</p> <p><a href="#">Add Email</a></p>
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[Cancel](#) [Confirm](#)

In this example, we requested to receive our security codes by email. Enter your email address and select **save**.



< Two-Step Verification Setup

**Add Email**

A security code will be sent via email when trying to access your MassTaxConnect account. Add MTCNoReply@dor.state.ma.us to your email whitelist to prevent security codes going to your junk folder.

What email address would you like to use?

Email

[Save](#)



Enter the security code that you received and choose **confirm**.



< Two-Step Verification Setup

✉ Verify Security Code

An email with your MassTaxConnect security code was sent to elmo@dor.state.ma.us. If you don't see the message, check your junk folder for an email from MTCNoReply@dor.state.ma.us.

Security Code

400533 [Populate](#) in development environments only.

Didn't receive your security code? [Resend](#)



Frequently Asked Questions

The next time you log in, check the box under the security code that says **Trust this device**. This will be the only time that you will have to do two-step authentication.



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### Verify Security Code

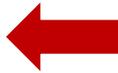
An email with your MassTaxConnect security code was sent to e\*\*\*@d\*\*.s\*\*\*\*.m\*.us. If you don't see the message, check your junk folder for an email from MTCNoReply@dor.state.ma.us.

Security Code

213113

[Populate](#) in development environments only.

Trust this device



Didn't receive your code? [Resend](#)

Cancel

Confirm