



Online Services

Tax Preparer Account Creation Checklist

Use the checklist below to create your Tax Professional Online Services account. **We suggest that you print this checklist for your records.** Note: You can create a tax professional account only if you:

- are an owner or officer of a firm (or an employee with authorization from an owner or officer of a firm); and
- have an Electronic Filer Identification Number (EFIN) on file with the Internal Revenue Service (IRS). If you don't have an EFIN, you must file an application online with the IRS to obtain one.

You will need the following information to successfully create your account:

- Your Taxpayer Identification Number. _____
Your taxpayer ID number is the employer identification number (EIN) or social security number (SSN) associated with your EFIN.
- Your six-digit Electronic Filer Identification Number (EFIN). _____
- If your EFIN is associated with your EIN, you'll be asked to provide specific information from corporation, sales, or withholding tax returns you have filed within the last 12 months. Refer to the following tables to be sure you're prepared with the correct information.

If you filed corporation tax form ...	Take the amount from	Amount
CT-3, CT-3-A, CT-4, CT-32, CT-32-A, CT-33, CT-33-NL	Line 1	
CT-3-S	Line 22	

If you filed sales tax form ...	Take the amount from	Amount
ST-100, ST-101, ST-810	Pg 3, Column C, Box 12	

If you filed withholding tax form ...	Take the amount from	Amount
NYS-1	Line 1	
NYS-45	Line 22	

- If your EFIN is associated with your SSN, you'll be asked to provide your federal adjusted gross income (FAGI) from a New York State income tax return you have filed for one of the past five years. Refer to the following table to be sure you're prepared with the correct information.

If you filed income tax form ...	Take the amount from	Amount
IT-201, IT-203	Line 19	

- Choose a username. _____
Your user name must be 8-60 characters long and consist of only letters, numbers, or these special characters: . @ _ - . Be sure to save your username in a secure place. **We cannot reset usernames.**
- Choose a *temporary* password. _____
 - Passwords are case sensitive and must include at least one number and three letters. You may not use the same character twice in a row.
 - Note that this password will be temporary. You will be asked to change it the first time you log into your account. **We cannot retrieve temporary passwords**, so be sure to write it down.

