# Franklin County Area Tax Bureau
Tax Preparer Access to Taxpayer Portal

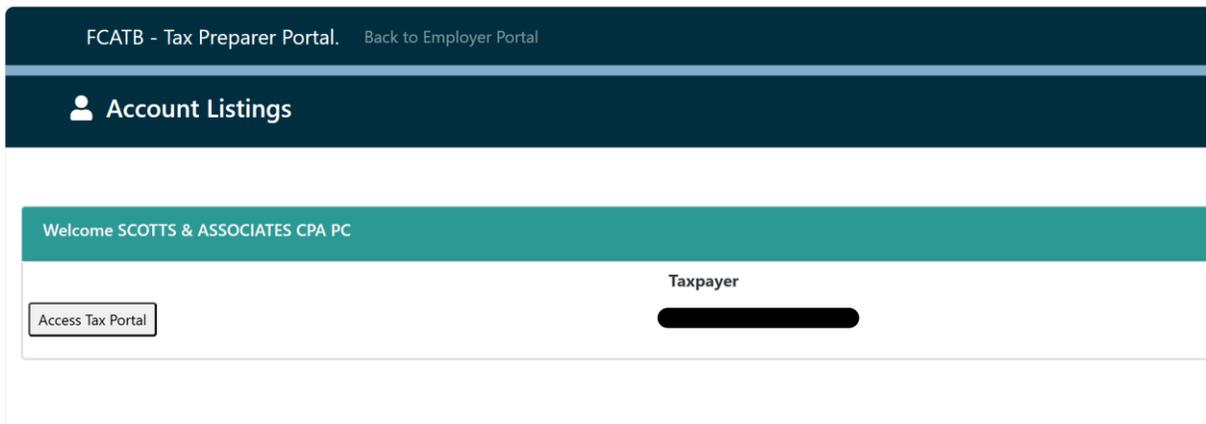1. **Tax Preparer Portal Access –** Tax preparers must have an Employer Electronic Filer account. If a tax preparer does not have an account, they can request an account by going to the Franklin County Area Tax Bureau website (www.fcatb.org). From the FCATB homepage, they will see a "Tax Preparer" option at the top of the page. Once on this page, they will see the "Tax Preparer Registration" link. Click on this link. Complete the form and send it to employerteam@fcatb.org. When the form has been received and an account is established, you will receive an email with a temporary password and a link to the electronic portal. You will need to change your password when you first log in. Follow the instructions provided online. As part of the process, you will be setting up Multi-Factorial Authentication (MFA) and creating some security questions. Please note that you will be receiving a separate email each time you log in with the appropriate PIN. Also, Access User ID can not be an email.

2. **Identified as Tax Preparer –** During the process of establishing a taxpayer portal, we were informed by almost every tax preparer that we met with that they did not want to change their process. In other words, they did not want to be submitting taxpayer returns. Therefore, if your organization elects to be tax preparer in order to submit tax returns on behalf of taxpayers, you will need to complete the Tax Preparer Registration Form. By completing the form, you indicate that you would like taxpayers to have the option of selecting your organization as their tax preparer. If you already have an Employer Electronic Filer account, simply send an email to our Executive Director (Ed Franchi) at ed_franchi@fcatb.org indicating you would like this option "opened up" on your account. Once this email is received, your account will be flagged as a "Tax Preparer." Note that you will use the same user identification.

3. **Taxpayer Authorization –** For security reasons and to maintain privacy, taxpayers will need to authorize an organization as their tax preparer. This is the step where the taxpayer authorizes the tax preparer to have access to the taxpayer's portal account for a selected tax year. A taxpayer can authorize different tax preparers each year. Therefore, this is a required step every year. A taxpayer will need to create an account in order to select their tax preparer. They can access a link to create an account under the Individual Tax Forms link from our home page (www.fcatb.org).

    When the taxpayer logs into the taxpayer portal account, they will see an "Authorization" option at the top of the web page. The taxpayer MUST click on this link. The screen below will appear. The taxpayer can "Add" a tax preparer to be authorized to access the taxpayer's portal for a given tax year.
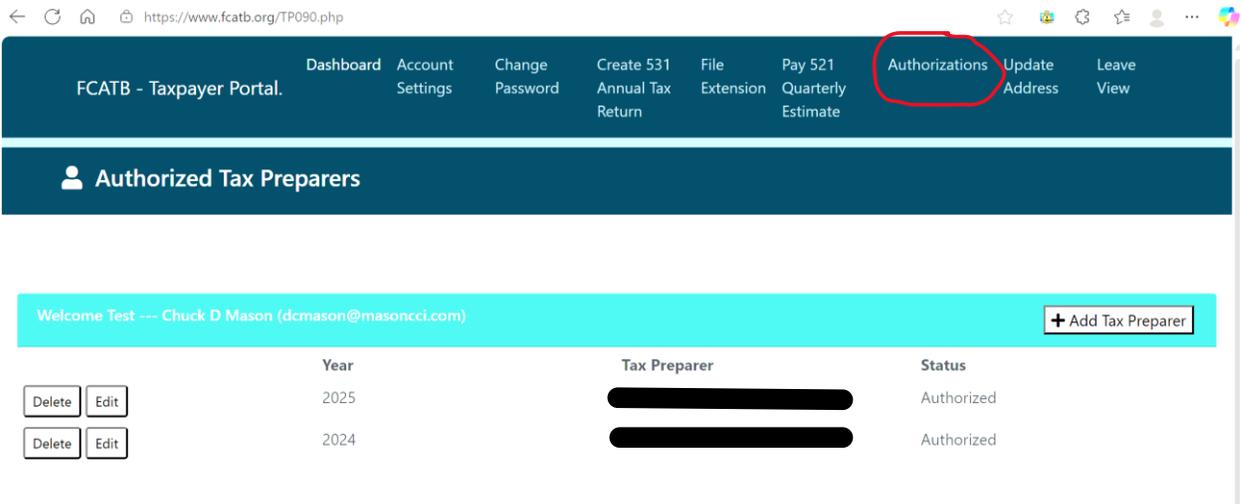
4. **Tax Preparer Access –** Once the taxpayer has selected their tax preparer, the tax preparer will be able to see this on their Tax Preparer Portal account. From our homepage (www.fcatb.org), go to the Tax Preparer Portal and login to your account. If the tax preparer is set up as a tax preparer (above) AND if at least one taxpayer has authorized the tax preparer to their account, then the tax preparer will see the following link at the top of their portal.

Clicking on the link "Access Taxpayer Portal" will display the following screen:

Each of the taxpayers that have authorized the tax preparer to their account will be listed on the screen. Click on the "Access Tax Portal" for the selected taxpayer. The following screen is displayed.

The tax preparer can create 531's, 521's, file an extension, or update an address.

Click on "Leave View" to return to the list of taxpayers that the tax preparer has access to.