

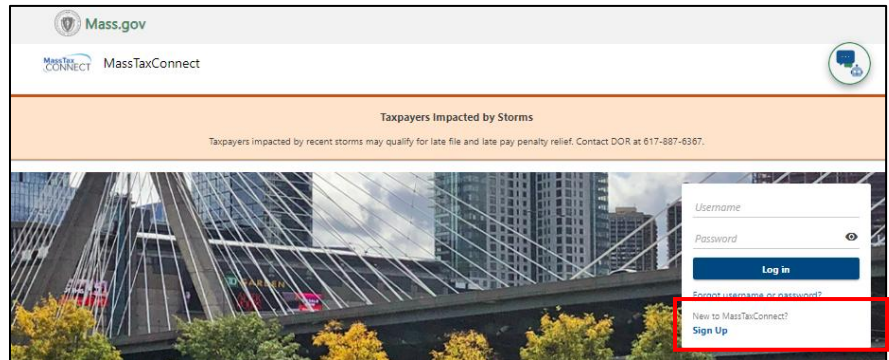
Instructions for Setting up Access to MassTaxConnect

Note: Please review the instructions for Step 6 on Page 2 prior to starting this process. Gather information on one of the Options before you begin the steps below. This will avoid timing out on the MassTaxConnect system while you complete those tasks.

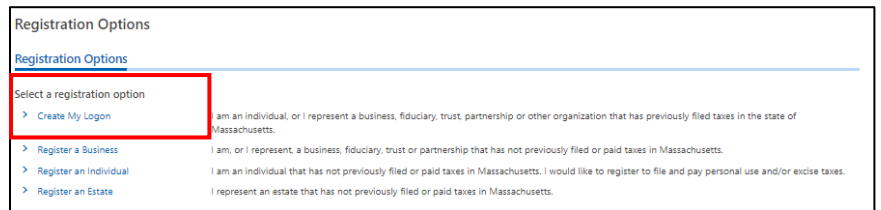
1. Navigate to MassTaxConnect:

<https://mtc.dor.state.ma.us/mtc/>

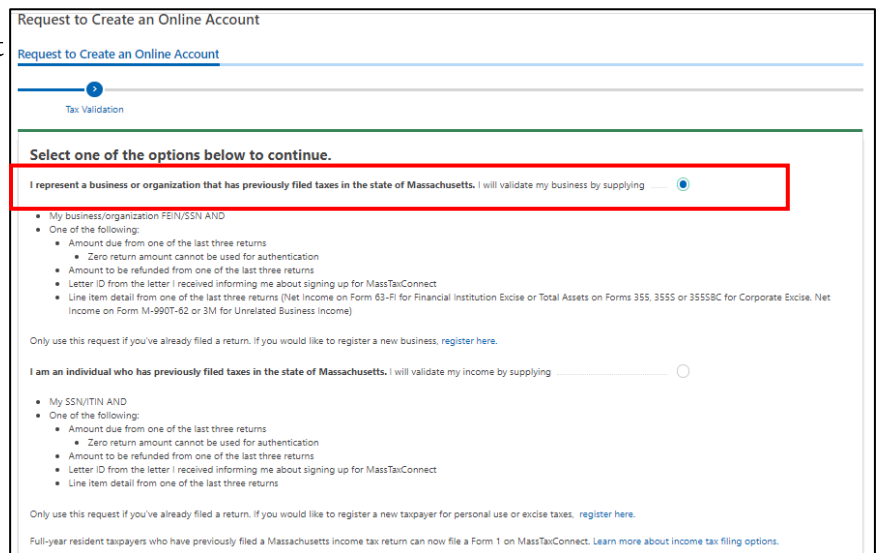
2. Click **Sign Up**.

The screenshot shows the MassTaxConnect homepage. At the top, there's a header with the Mass.gov logo and the MassTaxConnect logo. Below the header, there's a banner for "Taxpayers Impacted by Storms" with a link to contact the DOR. The main content area features a large image of a bridge. On the right side, there's a login box with fields for "Username" and "Password", a "Log in" button, and a "Sign Up" button. The "Sign Up" button is highlighted with a red box.

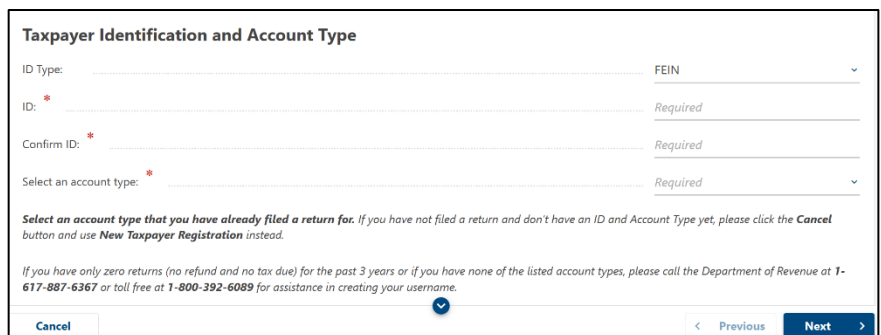
3. Under **Registration Options**, click **Create My Logon**.

The screenshot shows the "Registration Options" page. There's a section titled "Select a registration option" with a red box around the "Create My Logon" link. Below this, there are three options: "Register a Business", "Register an Individual", and "Register an Estate". Each option has a brief description of the user type and the taxes they will be registering for.

4. Click the top radio button: **I represent a business or organization that has previously filed taxes in the state of Massachusetts**. Note: this is accurate, since your location has filed for employee MA income tax withholding; Paylocity handles this for all locations that process payroll with Paylocity. Then click **Next**.

The screenshot shows the "Request to Create an Online Account" page. There's a section titled "Select one of the options below to continue." with a red box around the top radio button option: "I represent a business or organization that has previously filed taxes in the state of Massachusetts. I will validate my business by supplying...". Below this, there are two main options: "My business/organization FEIN/SSN AND..." and "I am an individual who has previously filed taxes in the state of Massachusetts. I will validate my income by supplying...". The first option is selected with a radio button.

5. Under **ID Type**, select **FEIN**. Under **ID** and **Confirm ID**, enter the location's **Federal Employer Identification Number**. Under **Select an account type**, select **Withholding Tax**.

The screenshot shows the "Taxpayer Identification and Account Type" page. There's a section titled "ID Type:" with a dropdown menu set to "FEIN". Below this, there are fields for "ID:" and "Confirm ID:", both marked with a red asterisk and "Required". There's also a dropdown for "Select an account type:" marked with a red asterisk and "Required". At the bottom, there's a "Cancel" button and a "Next" button. A note at the bottom states: "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." Another note at the bottom provides contact information for assistance.

6. There are two options for the next step:
Which of the following are you going to provide?

Which of the following are you going to provide?

A tax return amount OR a tax refund amount from 1 of the past 3 Withholding 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. ☐

Select **A tax return amount** OR a tax refund amount from 1 of the past 3 Withholding Tax filed returns.

To locate a tax return amount or a tax Refund amount from 1 of the past 3 Withholding Tax filed returns:

- In Paylocity, navigate to **Reports & Analytics > Quarter & Year End**.

The screenshot shows the Paylocity interface. The 'Reports & Analytics' menu is open, and 'Quarter & Year End' is highlighted with a red box. Other options visible include Reporting, Year End Dashboard, Payroll Process, Cash Management, Report Groups, and Audit Trail.

- Select one of the past 3 Quarter End Reports.

The screenshot shows the 'Quarter & Year End' Reports Pickup screen. A list of reports is displayed with columns for Name, Status, Item Date, and Class. The report 'Quarter End Report' for 3/31/2022 is highlighted with a red box.

Name	Status	Item Date	Class
Quarter End Report	Complete	6/30/2023 12:00:00 AM	QUARTERLY
2022 W2/1099	Complete	4/14/2023 11:08:53 AM	ANNUAL
2022 W-2C	Complete	4/14/2023 11:07:39 AM	ANNUAL
Quarter End Report	Complete	3/31/2022 12:00:00 AM	QUARTERLY
Quarter End Report	Complete	12/31/2022 12:00:00 AM	QUARTERLY
Quarter End Report - Amended	Complete	12/31/2022 12:00:00 AM	QUARTERLY
Quarter End Report - Amended	Complete	9/30/2022 12:00:00 AM	QUARTERLY
Quarter End Report - Amended	Complete	6/30/2022 12:00:00 AM	QUARTERLY
Quarter End Report - Amended	Complete	3/31/2022 12:00:00 AM	QUARTERLY

- Locate the amount for MA.

Tax Code	Description		
FITW	EE FWH		
SS	EE OASDI		
SS-R	ER OASDI		
MED	EE Medicare		
MED-R	ER Medicare		
MEDHI	EE Addtl Med		
SS3P	3 Party Sick		
FE0000-123	EE Uncl Tips		
MA	EE SWH		5,045.33

7. Enter that number in the **Amount** field, then click the radio button next to **Tax Return Amount**. Click **Next**

The screenshot shows the tax return amount entry screen. The amount '5,045.33' is entered in the 'Amount' field. The 'Tax Return Amount' radio button is selected. The 'Next' button is highlighted with a red box.

Which of the following are you going to provide?

A tax return amount OR a tax refund amount from 1 of the past 3 Withholding 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. ☐

Amount:

Is this a tax or refund amount?

Tax Return Amount ☒

Refund Amount ☐

Cancel Previous Next

If the above steps do not work, you will need **Letter ID** from the MA DOR, which you can obtain via telephone at (617) 887-6367. DOR's call center hours for tax help are 9 a.m. – 4 p.m., Monday through Friday.

When you call, explain that you work for the Catholic Church (or another religious employer) and do not file tax returns so need help with registration. The representative should give you the Letter ID over the phone, but they may say it must be sent via US Mail. Once you have the Letter ID, enter it were shown below.

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. ☒

Cancel

< Previous

Next >

Request to Create an Online Account

Request to Create an Online Account

Taxpayer Type

Taxpayer ID and Account

Verification Type

Letter ID

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

How can I find my letter ID?

Letter ID: Required

Cancel

< Previous

Next >

Letter ID Info

The Letter ID can be found in the top right corner of the letter. Please note that you can ONLY use the letter ID specifically from the letters titled:

Notice of Account ID
USD Consolidated Bill
Attorney General Lien
Notice of Failure to File
Failure to Register and File

UST Consolidated Bill
Care and Custody Initial Bill
Notice of Assessment
Introducing MassTaxConnect

IDs from other correspondence received from the DOR will not be accepted. The ID consists of an "L", followed by a 10-digit number.

Cancel

OK

8. Complete the fields to **Create Your MassTaxConnect Online Profile**. Click **Next** to proceed.

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: Required

Phone country: USA

Phone type: Business

Phone number: Required

Create a 4-digit PIN: Required

E-mail address: Required

Confirm e-mail:

Cancel

< Previous

Next >

3

9. Create a Username, Password, Security Question and Answer. Click **Next** to proceed.

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-mailed to you and will be available after you have logged in.

Username:

- be between 3-40 characters.
- contain no spaces

Password:

- have at least 8 characters.
- contain at least one upper case letter.
- contain at least one lower case letter.
- contain at least one number.
- contain at least one special character.

Username: Required

Password: Required

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: Required

Answer: Required

Cancel Previous Next

10. Click **Next** to proceed.

Request to Create an Online Account

Request to Create an Online Account

and Account Verification Type Tax Amount Profile Information User Login Setup 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 Previous Next

11. Check the box next to **I agree** and click **Next** on the Terms of Use Agreement screen.

Request to Create an Online Account

Request to Create an Online Account

and Account Verification Type Tax Amount Profile Information User Login Setup Profile Access Terms of Use

Terms of Use Agreement

As a Tax Administrator (TA), I hereby agree to the following terms and conditions governing the use of the Massachusetts Department of Revenue's (DOR) MassTaxConnect account on behalf of the business entity (company) which I represent as a TA:

I certify that I am duly authorized to act on behalf of my company regarding its tax account with the DOR and to register with the DOR as a TA on behalf of such company.

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 on behalf of my company.

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

I am not authorized to allow anyone else to have access to, and I am not authorized to release, any tax information accessed through my MassTaxConnect Credentials, without the express permission of my company.

My company and I are jointly responsible for my MassTaxConnect Credentials. Both my company and I can be held accountable for any access gained and/or any transactions attempted or completed with these Credentials by me or anyone else who gains access to the MassTaxConnect system as a result of my negligence in failing to safeguard this information.

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

I will not use my MassTaxConnect credentials for personal use. I will only use these credentials for the purpose of MassTaxConnect functions and performing job-related activities authorized by my employer.

I will disable my TA account if I leave the employ of my company, or if my job responsibilities change such that MassTaxConnect administration or access is no longer part of my responsibilities. My company's MassTaxConnect account can only be re-enabled by the full MassTaxConnect registration process.

I understand and agree to the Terms of Use outlined above regarding the user of my MassTaxConnect Credentials.

I agree ☐

Cancel Previous Next

12. Confirm that your Information is correct, and then click **Submit**.

Request to Create an Online Account

Request to Create an Online Account

and Account Verification Type Tax Amount Profile Information User Login Setup Profile Access Terms of Use Summary

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:

Username:

Phone Number:

Email Address:

Cancel Previous Submit

13. Print the Confirmation (and/or save it somewhere secure to refer to when logging in in later years) then click **OK**.

You are now ready to begin your HIRD filing (see separate instructions).