

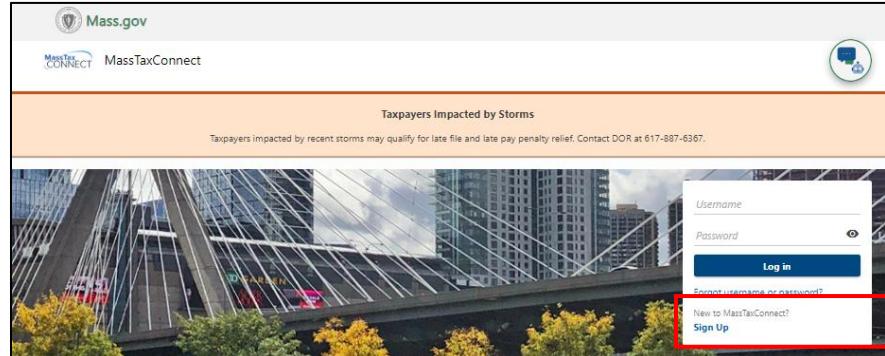
Instructions for Setting up Access to MassTaxConnect

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:

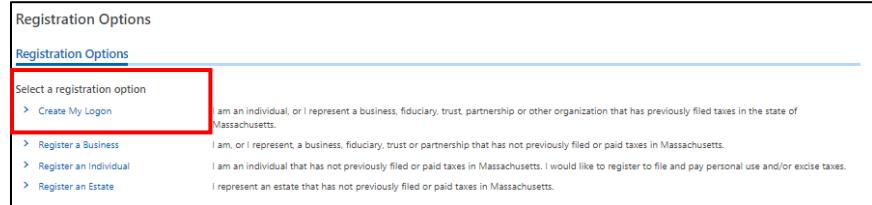
<https://mtc.dor.state.ma.us/mtc/>

2. Click Sign Up.



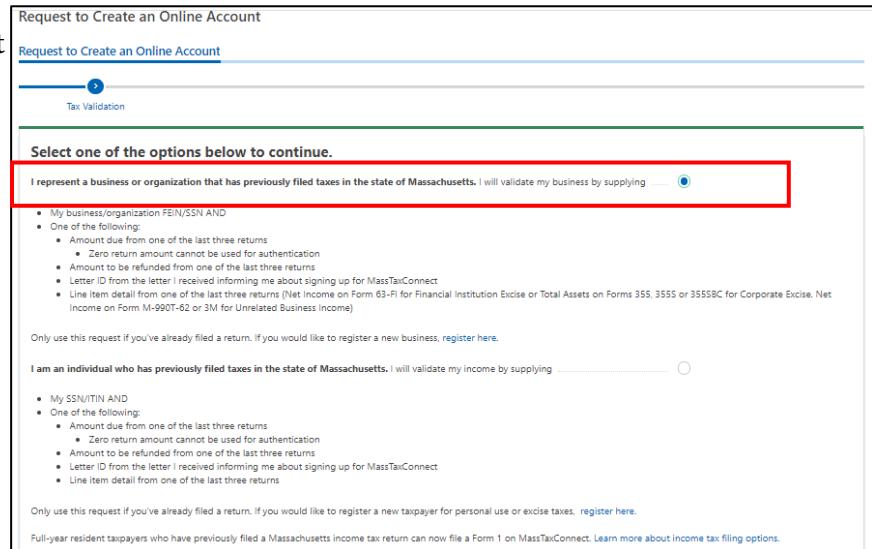
The screenshot shows the MassTaxConnect homepage. At the top, there is a navigation bar with the Mass.gov logo, the MassTaxConnect logo, and a search bar. Below the navigation bar, a banner reads "Taxpayers Impacted by Storms" with a subtext about recent storms and contact information. On the right side of the banner, there is a login form with fields for "Username" and "Password", a "Log in" button, and links for "Forgot username or password?" and "Sign Up". The "Sign Up" button is highlighted with a red box.

3. Under Registration Options, click Create My Logon.



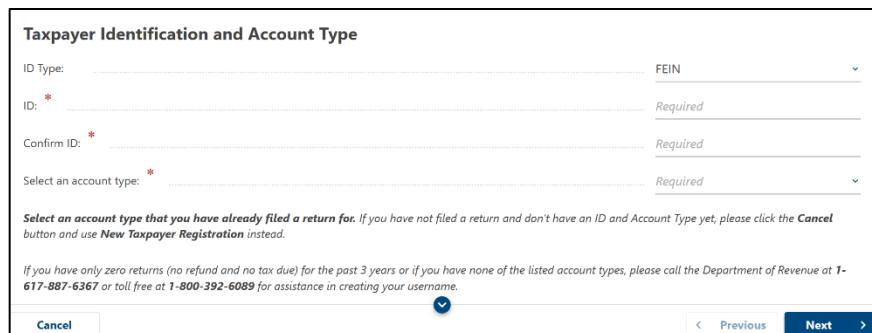
The screenshot shows the "Registration Options" page. It has a header "Registration Options" and a sub-header "Select a registration option". Below this, there are four options: "Create My Logon", "Register a Business", "Register an Individual", and "Register an Estate". The "Create My Logon" link is highlighted with a red box. To the right of each option, there is a brief description of the type of taxpayer.

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. It has a header "Request to Create an Online Account" and a sub-header "Tax Validation". Below this, it says "Select one of the options below to continue." There are two radio buttons: one for "I represent a business or organization that has previously filed taxes in the state of Massachusetts." and one for "I am an individual who has previously filed taxes in the state of Massachusetts." The first radio button is highlighted with a red box. Below each radio button is a list of validation options. At the bottom of the page, there is a note about full-year resident taxpayers and a link to learn more about income tax filing options.

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. It has a header "Taxpayer Identification and Account Type". There are three input fields: "ID Type" (set to "FEIN"), "ID" (with a red asterisk indicating it is required), and "Confirm ID" (also with a red asterisk). Below these, there is a field "Select an account type: *". At the bottom of the page, there is a note about account types and a link to cancel or use new taxpayer registration. There are "Cancel", "Previous", and "Next" buttons at the bottom.

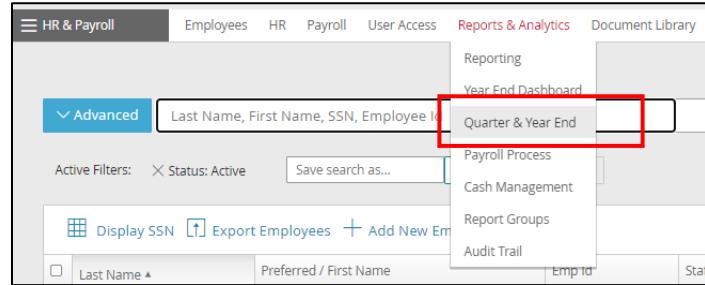
6. There are two options for the next step:

Which of the following are you going to provide?

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

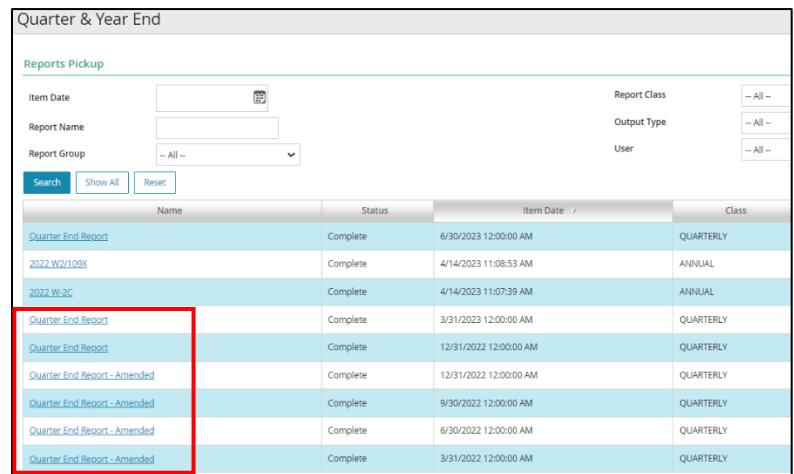
To locate a tax return amount or a tax Refund amount from 1 of the past 3 Withholding Tax filed returns:

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



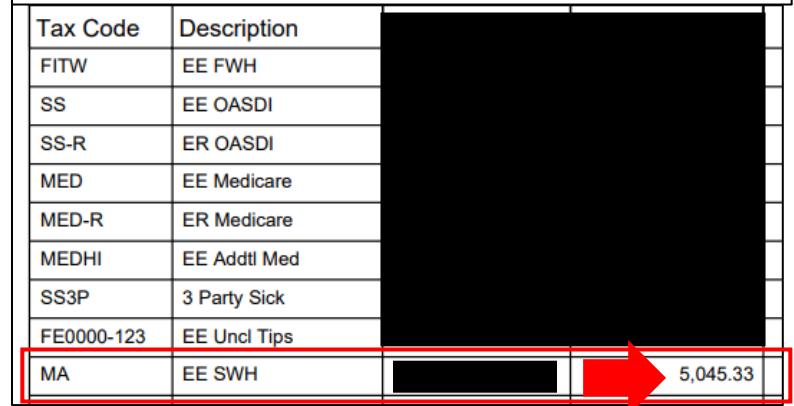
The screenshot shows the Paylocity HR & Payroll interface. The top navigation bar includes 'Employees', 'HR', 'Payroll', 'User Access', 'Reports & Analytics', and 'Document Library'. The 'Reports & Analytics' tab is active. A sub-menu for 'Quarter & Year End' is open, with the 'Quarter & Year End' option highlighted by a red box. Other options in the sub-menu include 'Payroll Process', 'Cash Management', 'Report Groups', 'Audit Trail', and 'Stat'.

- Select one of the past 3 Quarter End Reports.



The screenshot shows the 'Quarter & Year End' report list. The 'Reports Pickup' section includes fields for 'Item Date', 'Report Name', 'Report Group', and search buttons. The main table lists various reports with columns for 'Name', 'Status', 'Item Date', and 'Class'. A red box highlights the first report in the list, 'Quarter End Report', which is complete and dated 3/31/2023. The table has a total of 10 rows.

- Locate the amount for MA.



The screenshot shows a table of tax codes. The columns are 'Tax Code' and 'Description'. The table includes rows for FITW, SS, SS-R, MED, MED-R, MEDHI, SS3P, FE0000-123, and MA. The 'MA' row is highlighted by a red box and an arrow points to the 'Description' column, which shows 'EE SWH' and the amount '5,045.33'.

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

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

Click Next



The screenshot shows the 'MassTaxConnect' step 2 form. The top section asks 'Which of the following are you going to provide?' with two radio button options. The 'Amount' field is set to '100.00'. The 'Tax Return Amount' radio button is selected and highlighted by a red box. The 'Refund Amount' radio button is also present. At the bottom are 'Cancel', 'Previous', and 'Next' buttons, with 'Next' highlighted by a red box.

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

1 Taxpayer Type 2 Taxpayer ID and Account 3 Verification Type 4 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	UST Consolidated Bill
USD Consolidated Bill	Care and Custody Initial Bill
Attorney General Lien	Notice of Assessment
Notice of Failure to File	Introducing MassTaxConnect
Failure to Register and File	

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

1 Taxpayer Type 2 Taxpayer ID and Account 3 Verification Type 4 Tax Amount 5 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](#) [>](#)

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

Username must:

- be between 3-63 characters;
- contain no spaces;

Passwords must:

- 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.

Questions: Required

Answer: Required

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 Logon Setup Profile Access Next

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.

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 Logon Setup Profile Access Terms of Use Next

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 use of my MassTaxConnect Credentials.

I agree 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 Logon Setup Profile Access Terms of Use Summary Next

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:

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).