

## MassTaxConnect

(For MA tax filers - January, 2017)

### MassTaxConnect:

In November 2016 MA DOR introduced a new, much improved online system to help manage your MA tax account for review, payments, notices, and 3<sup>rd</sup> party preparer access. General information is available here:

<https://www.mass.gov/dor/e-services/masstaxconnect.html>

The MassTaxConnect web site is here:

[https://mtc.dor.state.ma.us/mtc/\\_/](https://mtc.dor.state.ma.us/mtc/_/)

There are 2 ways to authorize The Financial Advisors, LLC for 3<sup>rd</sup> party access:

- Client Authorization Form - contact TFA and we will provide a form to sign/date and return to authorize access. This method does not require setting up an online account.
- Online - Register your account on MassTaxConnect and use the following steps online:

Steps to authorize TFA, LLC for 3<sup>rd</sup> party access to your MATaxConnect account:

- Login to your MATaxConnect account
- Go to "Profile"



- Go to "Assign Access Rights to a Third Party"



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Type "Financial Advisors" in the search box to locate our firm



SELECT YOUR THIRD PARTY

Below is a list of the third parties that chose to list themselves in the Third Party Directory. Select the company that you are choosing to give third party access to. The list can be filtered by entering the name of the parties you are looking for into the box above the list and pressing "Enter."

Financial Advisors

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Select	Legal Name	DBA Name
<input type="radio"/>	5 TOWNS DRIVE INC	
<input type="radio"/>	PRIME PAYROLL SERVICES INC	
<input type="radio"/>	ONYX LEASING SYSTEMS INC	
<input type="radio"/>	GIGAMON INC	
<input type="radio"/>	LYNN DURKIN CPA & ASSOCIATES	
<input type="radio"/>	CONRAD VOUT	
<input type="radio"/>	AMITA PAUL	
<input type="radio"/>	PERFORMANCE CONTRACTING INC	
<input type="radio"/>	PATRICIA GOVE	
<input type="radio"/>	PAYVILLE USA	
<input type="radio"/>	EXECUPAY, INC.	
<input type="radio"/>	DANIEL W POLACHEK PC	
<input type="radio"/>	RAMOS ACCOUNTING & TAX SERVICES INC	
<input type="radio"/>	JOSEPH T BARINELLI CPA	
<input type="radio"/>	AMCHECK TAX SERVICE	
<input type="radio"/>	LAW OFFICE OF GEORGE P KATSARAKE	
<input type="radio"/>	NEW LONDON HOSPITAL ASSOC INC	
<input type="radio"/>	SMART ASSOCIATES INC	
<input type="radio"/>	ROGER W DEAN CO	
<input type="radio"/>	CALLIDUS SOFTWARE INC STE C/O CALLIDUSC	

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Cancel Next

- Select "Financial Advisors LLC" in the result list

Financial Advisors

Select	Legal Name	DBA Name
<input checked="" type="radio"/>	FINANCIAL ADVISORS LLC	
<input type="radio"/>	MURRAY FINANCIAL ADVISORS LLC	

2 Rows

Cancel Next

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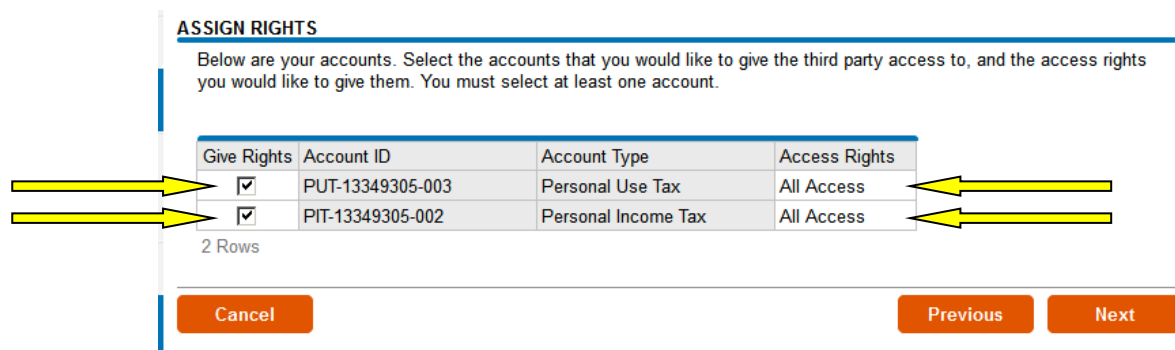
- Assign access rights
  - Give Rights: Select both Personal Income Tax and Personal Use Tax
  - Access Rights: Select "All Access" for each tax type. This provides the most flexibility for us to assist. The other choices are "View only" or "File and Pay"

**ASSIGN RIGHTS**

Below are your accounts. Select the accounts that you would like to give the third party access to, and the access rights you would like to give them. You must select at least one account.

Give Rights	Account ID	Account Type	Access Rights
<input checked="" type="checkbox"/>	PUT-13349305-003	Personal Use Tax	All Access
<input checked="" type="checkbox"/>	PIT-13349305-002	Personal Income Tax	All Access

2 Rows



- Submit the request on the next screen. We are then notified of the request.