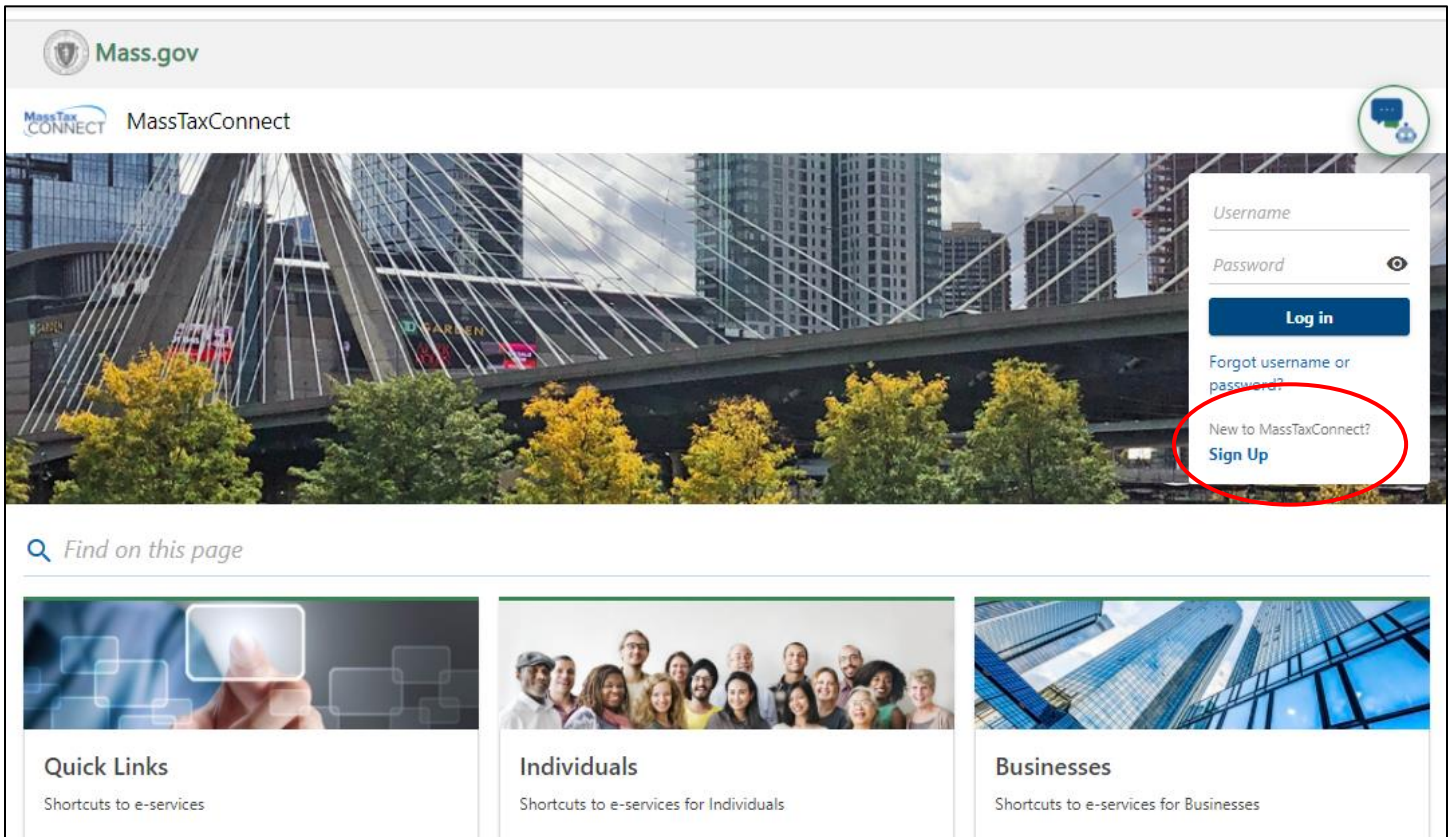


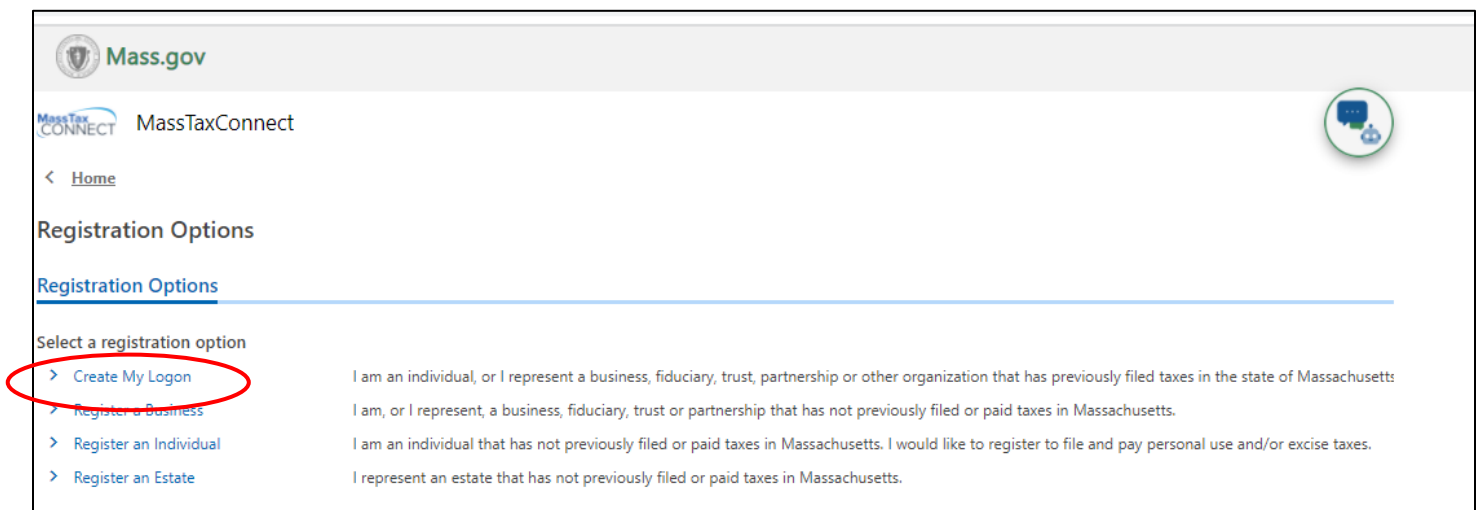
# Instructions for Setting up Access to MassTaxConnect

**Note:** Please review the instructions for Step 6 on Page 3 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”



3. Under Registration Options, click “Create My Logon”



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; PrimePay handles this for all locations that process payroll with PrimePay. Then click “Next”.

**Request to Create an Online Account**

**Request to Create an Online Account**

Taxpayer Type

Select one of the options below to continue.

I represent a business or organization that has previously filed taxes in the state of Massachusetts. I will validate my business by supplying

- My business/organization FEIN/SSN AND
- One of the following:
  - Amount due from one of the last three returns
    - Zero return amount cannot be used for authentication
  - Amount to be refunded from one of the last three returns
  - Letter ID from the letter I received informing me about signing up for MassTaxConnect
  - Line item detail from one of the last three returns (Net Income on Form 63-FI for Financial Institution Excise or Total Assets on Forms 355, 355S or 355SBC for Corporate Excise. Net Income on Form M-990T-62 or 3M for Unrelated Business Income)

Only use this request if you've already filed a return. If you would like to register a new business, [register here](#).

I am an individual who has previously filed taxes in the state of Massachusetts. I will validate my income by supplying

- My SSN/ITIN AND
- One of the following:
  - Amount due from one of the last three returns
    - Zero return amount cannot be used for authentication
  - Amount to be refunded from one of the last three returns
  - Letter ID from the letter I received informing me about signing up for MassTaxConnect
  - Line item detail from one of the last three returns

Only use this request if you've already filed a return. If you would like to register a new taxpayer for personal use or excise taxes, [register here](#).

Personal Income tax returns cannot be filed on MassTaxConnect. [Learn more about income tax filing options](#).

Cancel Previous Next

5. Choose “FEIN” as ID Type, then enter the location’s Federal Employer Identification Number. Select “Withholding Tax” under “Select an account type.”

**Request to Create an Online Account**

**Request to Create an Online Account**

Taxpayer Type Taxpayer ID and Account

**Taxpayer Identification and Account Type**

ID Type: FEIN

ID: \*

Select an account type: Withholding Tax

If you don't have an ID and Tax Type yet, please click the **Cancel** button and use **New Taxpayer Registration** instead.

If you have only zero returns (no refund and no tax due) for the past 3 years, please call the Department of Revenue at 1-617-887-6367 or toll free at 1-800-392-6089 for assistance in creating your username.

Cancel Previous Next

- There are two options for the next step: “Which of the following are you going to provide?”  
Select the option “A tax return...” then click “Next.”

To use a tax return amount OR a tax refund amount from 1 of the past 3 Withholding Tax filed returns, you must first determine which filing schedule applies to your location. To do this, locate and view one of your recently stored 2022 Quarterly Tax Reports from PrimePay.

Go to the bottom of the third page (Reconciliation Sheet) of the Report. If “Quarter Monthly” appears under Frequency, the location is a **quarterly** filer.

<i>MA WH - Massachusetts State Withholding</i>	Quarter Monthly
--	-----------------

For quarterly filers, copy the amount from the line “MA WH – Massachusetts State Withholding” into the “Amount” field, then click the radio button next to “Tax Return Amount.”

For Monthly Filers: If the Quarterly Tax Report says “Monthly,” you will need to determine the correct amount to enter into the “Amount” field.

In PrimePay, under Reports → Report Archives, then Archives on the right, choose the last pay date in September 2022. Then under Reports, choose 022- Monthly Consolidated Dept Recap. Click “Run Report.”

On the last page of that report, on the far right, note the number for STATE TAXES W/H.

*----- COMPANY SUMMARY -----*	
GROSS EARNINGS	36,026.08
FEDERAL INC. TAX W/H	3,307.38
F.I.C.A.	1,962.91
MEDICARE	459.03
STATE TAXES W/H	1,556.71
COUNTY TAXES W/H	0.00
CITY TAXES W/H	0.00
SCHOOL DISTRICT W/H	0.00
ETC	0.00
STATE ETC	0.00
DISABILITY TAX W/H	0.00
EMPLOYEE UC W/H	0.00
ALL OTHER TAXES W/H	0.00

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

Request to Create an Online Account

Request to Create an Online Account

Progress: Taxpayer Type, Taxpayer ID and Account, Verification Type, Tax Amount

Amount:  Must be greater than \$0

Is this a tax or refund amount?

Tax Return Amount

Refund Amount

Buttons: Cancel, Previous, Next

Then click “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 where shown below.

Enter the Letter ID then click “Next”

Request to Create an Online Account

Request to Create an Online Account

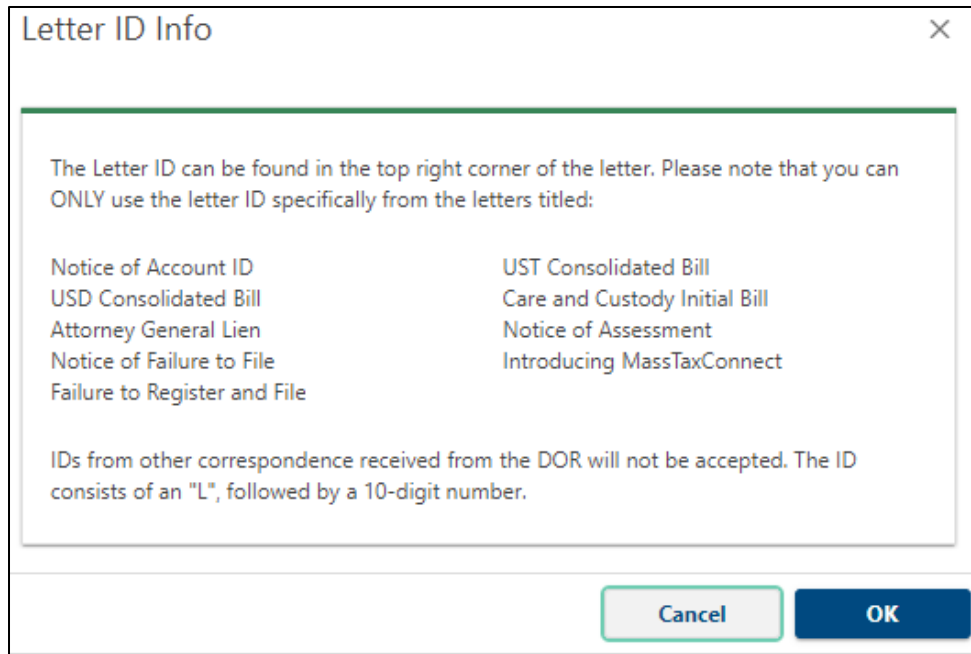
Progress: Taxpayer Type, Taxpayer ID and Account, Verification Type, Letter ID

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

Buttons: Cancel, Previous, Next



- 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](#)

Progress: Taxpayer Type ✓ Taxpayer ID and Account ✓ Verification Type ✓ Tax Amount ✓ Profile Information (active)

### 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

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

**Username:**

- be between 3-60 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:  Required

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

9. 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

### 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.

10. Check “I agree” and “Next” on the Terms of Use Agreement screen.

**Request to Create an Online Account**

Request to Create an Online Account

Account Type Tax Amount Profile Information User Logon 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

11. Confirm that your information is correct, and then click “Submit.”

**Request to Create an Online Account**

Request to Create an Online Account

Account Amount Profile Information User Logon 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

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

### Request to Create an Online Account - Confirmation

- Confirmation Number:
- Submitted Date and Time: 11/15/2021 9:59:53 AM
- Username:
- PIN:

Your *Request to Create an Online Account* has been submitted. Please print this page and save the confirmation number above for your records. You will receive two emails confirming:

- Receipt of your *Request to Create an Online Account*
- Approval of your *Request to Create an Online Account*

Your submission will be processed shortly.

If you are having issues receiving emails from the Department of Revenue, please check your Spam folder. Additionally, you can add [MTCTNoReply@dor.state.ma.us](mailto:MTCTNoReply@dor.state.ma.us) to your *Safe Senders* list to avoid missing valuable emails in the future.

**Contact Us**  
If you need further assistance, please contact the Department of Revenue at (617) 887-6367 or toll-free in Massachusetts at (800) 392-6089. Business hours are Monday through Friday, 9:00 a.m. to 4:00 p.m.

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