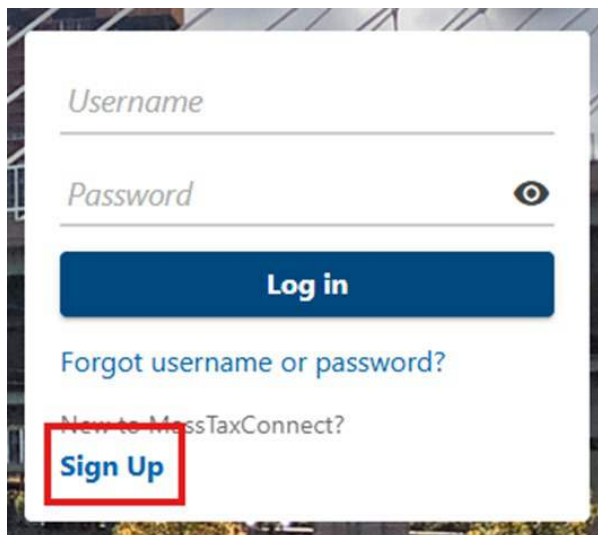


How to create a MassTaxConnect account for an Individual

The below steps will show you how to set up an Individual account on the MassTaxConnect website. This will allow you to quickly pay estimates, return balances, and extension payments. You can also respond to notices, track your refunds, and request a Certificate of Good Standing.

Step 1: Navigate to the MassTaxConnect website at <https://mtc.dor.state.ma.us/mtc>

1. Click **Sign Up** to begin.



A screenshot of the MassTaxConnect login and sign up form. The form is white with a blue border. It contains the following elements: a 'Username' input field, a 'Password' input field with an eye icon for toggling visibility, a blue 'Log in' button, a link for 'Forgot username or password?', and a link for 'New to MassTaxConnect?'. Below the 'New to MassTaxConnect?' link is a red-bordered box containing the text 'Sign Up'.

Step 2: Choose an account type

1. Select Create **My Logon**.
 - a. Please note if you have never filed a Massachusetts Tax Return, select **Register an Individual**.

Registration Options

Select a registration option

> **Create My Logon**

> Register a Business

> Register an Individual

> Register an Estate

I am an individual, or I represent a business, fiduciary, trust, partnership or other organization that has previously filed taxes in the state of Massachusetts.

I am, or I represent, a business, fiduciary, trust or partnership that has not previously filed or paid taxes in Massachusetts.

I am an individual that has not previously filed or paid taxes in Massachusetts. I would like to register to file and pay personal use and/or excise taxes.

I represent an estate that has not previously filed or paid taxes in Massachusetts.

Step 3: Confirm taxpayer identity

1. Select the second option indicating you are an individual.

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](#).

Full-year resident taxpayers who have previously filed a Massachusetts income tax return can now file a Form 1 on MassTaxConnect. [Learn more about income tax filing options.](#)

2. **SSN** from the drop-down menu for ID Type.
3. Enter your **SSN** and re-enter to confirm.
4. Select **Personal Income Tax** from the drop-down menu for Account Type.

Taxpayer Identification and Account Type

ID Type: SSN 

ID:  Required

Confirm ID:  Required

Select an account type: Personal Income Tax 

5. Select the first option indicating you will provide a **tax return amount or tax refund amount**.
6. Select either **Tax Return Amount** if you owed money on your prior year Massachusetts Tax Return or **Refund Amount** if you were due a refund on your prior year Massachusetts Tax Return.
 - a. *Please note if you select **Tax Return Amount**, you should enter your Income Tax After Credits (line 37) and not the actual tax due to Massachusetts (line 54).*
7. Enter the **amount**.

8. Hit **Next**.

Which of the following are you going to provide?

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

Which would you like to provide?

Tax Return Amount ☐

Refund Amount ☐

Amount: * Required

[How do I find this amount?](#)

[Cancel](#) [Previous](#) [Next](#)

Step 4: Create your MassTaxConnect profile

1. Enter all your **personal information**.
2. Hit **Next**.

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

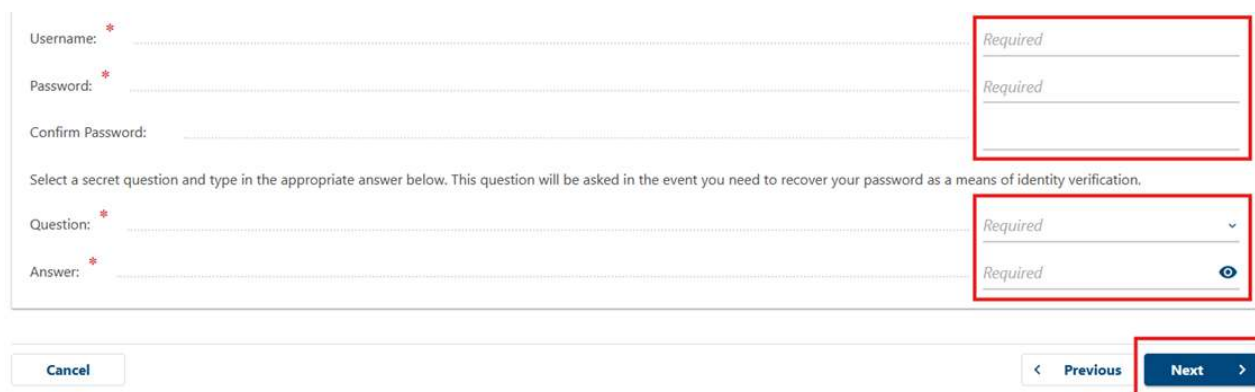
E-mail address: * Required

Confirm e-mail:

[Cancel](#) [Previous](#) [Next](#)

Step 5: Choose login credentials

1. Choose a **username**.
2. Choose a **password**, and re-enter to confirm.
3. Choose a **secret question** from the drop-down menu and enter the **answer**.



Username: *

Password: *

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: *

Answer: *

Required

Required

Required

Required

Cancel

< Previous

Next >

Step 6: Finalize your account

1. If you plan to access several MassTaxConnect accounts, check the **box** below. Otherwise leave it blank. Typically, this box is checked only for tax professionals.
2. Hit **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.

☐

Cancel

< Previous

Next >

3. Agree to the **Terms of Use**.
4. Hit **Next**.

Terms of Use Agreement

As an Individual taxpayer, I hereby agree to the following terms and conditions governing the use of the Massachusetts Department of Revenue's (DOR) MASSTAX CONNECT:

I certify that the Social Security Number (SSN) that I have provided is in fact mine.

I certify that the tax information I have provided is from my personal tax return.

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.

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

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

I understand and agree to the Terms of Use outlined above regarding the use of my MASSTAX CONNECT Credentials.

I agree ☒

5. Confirm your login information and hit **Submit**.
 - a. We highly recommend printing and saving the confirmation information.
 - b. You will receive a confirmation email where you will be asked to activate your account, log in, and set up two-step verification.

Further Support:

- **MassTaxConnect FAQ's:** <https://www.mass.gov/info-details/about-masstaxconnect>
- **MassTaxConnect phone support:** 617-887-6367 or toll-free 800-392-6089
- **MassTaxConnect Instructional Video:** [Watch YouTube Video Here](#)
- **LGA support:** taxoperations@lga.cpa