

MassTaxConnect and IRS.GOV Authorizations

The Massachusetts Department of Revenue and IRS provide taxpayers with online portals to view their tax accounts, view prior year returns, make payments, view notices and letters, as well as provide authorization to third parties to view portal information.

In order to expedite and make tax preparation as efficient as possible, Kurzman, Dempsey & Kowalker, LLP recommends you create access to online portals with the MA Department of Revenue (if you have a MA filing requirement) and the IRS, and authorize KDK to view portal information for return preparation.

Do you have or will you create online portal access with MassTaxConnect and IRS.GOV?

Yes _____ No _____

If Yes, do you authorize KDK to request access and view your online tax account information?

Yes _____ No _____

If Yes, which online portals have you created, or will create?

MA TaxConnect: _____ IRS.GOV: _____

Other State Portal (please specify): _____

Instructions to follow on the next page for creating and inevitably authorizing KDK professionals with access to your online portal information.

At any point throughout the process, if issues come up, please contact the staff at KDK to assist you with creating these accounts or authorizing access.

Primary Taxpayer's Signature

Date Signed

**A SIGNED COPY OF THIS ACKNOWLEDGEMENT MUST BE
RETURNED TO US**

Signing Up for MassTaxConnect: <https://mtc.dor.state.ma.us/>

1. Under "Quick Links," Click "Register a New Taxpayer"
2. On the next page, Click "Create My Logon" if you've filed a return in MA before
3. On the next page, make sure "I am an individual who has previously filed taxes in the state of Massachusetts. I will validate my income by supplying" is selected
 - Then under "Taxpayer Identification and Account Type," select "SSN" from the dropdown menu on the "ID Type" line. Enter your full Social Security Number on the next two lines
 - Select an account type: "Personal Income Tax" from the next dropdown
 - Check the box to provide "A tax return amount or refund amount"
 - From a Massachusetts return filed within the past 3 years, enter either the Income Tax After Credits (line 37 resident return or line 41 non-resident), or Refund Amount (line 52 resident or line 56 non-resident). Make sure the appropriate box is checked to say which amount you're entering Click Next
4. On the next page, enter your Name, Phone Number, 4-digit PIN, and email address Click Next
5. On the next page, create a Username, Password, and Challenge Question. Make sure to notate this information for logging in Click Next
6. On the next page Click Next without checking the box
7. On the next page, check the box to agree to the terms and Click Next to create your account

Authorizing Third Party Access To MassTaxConnect:

1. Once logged in, Click "Manage My Profile" at the top right of the page
2. On the next page, Click the "More" tab, then under the "Third Party Access" Click "Manage Third Party Access"
3. On the next page, confirm it says "Yes" next to "Allowed"
4. Click the hyperlink to the right of "Default Account Access." On the next page, under "Type of Account Access," choose from the dropdown menu "View Only" and Click "Save"
5. Once KDK requests access to your account, you approve via "Manage My Profile" "More" tab "View Access Requests From Third Parties" under the "Third Party Access" panel select the Approve/Deny hyperlink for the request Select the check box in the "Give Rights" column Select the access type in the "Granted Rights" column
6. We will have you sign a Client Authorization Form to submit to the MA Department of Revenue

Signing Up for IRS.GOV Online Account: <https://sa.www4.irs.gov/ola/>

1. Click under "Create a new account" "ID.me Create an account"
2. On the next page, enter your email and a password to create an ID.me account if you haven't already set one up. Otherwise, Click to "Sign in to ID.me" if you already have a sign in
3. If you are new to ID.me, you'll next need to confirm your email address
4. Then you'll have to enable multifactor authentication with your phone
5. On the site, Choose ID verification: Self-Service with "Video Selfie" or Video Chat with ID.me agent
6. Upload pictures of your ID, whether a Driver's License, State ID, or Passport
7. Take and upload a "Video Selfie" or wait an hour or two for a video chat interview
8. Enter your Social Security number
9. Finally, authorize IRS access to ID.me verification

Authorizing Third Party Access To IRS.GOV Online Account:

1. Once signed in to your IRS.GOV account, hover over the "Authorizations" tab and Click "Power of Attorney and Tax Information Authorizations"
2. On the next page, you'll Click to view, approve, or reject authorization requests sent to your account. One of the CPAs from KDK, LLP will request authorization, which you'll approve on this page