



ANNE M. GANNON
CONSTITUTIONAL TAX COLLECTOR
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How To Guide: Before Getting Started – Agents

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Important Information for Agents

As an agent, you will not need to create a TDT account. Your client must create a TDT account and authorize you to file returns and pay taxes on their behalf. You will create a login to gain access to a dashboard where you will be able to manage your clients' accounts in the portal.

Next Steps

- You must have a valid Business Tax Receipt (BTR) and Federal Employer Identification Number (FEIN) to create a login.
- After you create and verify your login, inform your clients and let them know they can now authorize you in the system.
- You will receive a system-generated email asking you to Accept or Decline your client's request to grant you authorization.
- When you accept the request, the next time you login to the portal, your client's property will appear on your dashboard.



Important Tips:

- ✓ We recommend you speak with your clients to confirm they have set up their TDT account in the portal.
- ✓ Once your login is created, your clients will be able to select your name from a list of agents in the system. Your clients will send a request to you to manage their TDT account.
- ✓ For more information about obtaining a BTR, please visit the [Local Business Tax section of our website](#).



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For additional tutorials,
please visit the TDT Support Center at
www.pbctax.com/tdt