



Information for Tax Professionals

What you need to know:

- You can continue to use Modernized e-File (MeF) services to file clients' Individual Income Taxes as you have in the past. You do not need to do anything different.
- While you are not required to set up a Username and Password on the Maine Tax Portal to file your clients' Individual Income Taxes, there are some cases where you might want to do so. If you set up access to your clients' account, you can:
 - View your clients' payment history.
 - View bills and notices to your client from Maine Revenue Services.

For security reasons, you will NOT be able to view clients' past filings on the Maine Tax Portal.

- If clients owe Individual Income Taxes, they can easily make payments at revenue.maine.gov. They **do not** need to set up a Username and Password on the Maine Tax Portal to do this.
- If clients need to set up payment plans, they must set up a Username and Password on the Maine Tax Portal (see instructions on other side).

How Tax Professionals can set up a Maine Tax Portal Username and Password:

- Go to revenue.maine.gov and select "Create a Username."
- Select "I am a licensed payroll processor or independent third party who works on behalf of a person or an entity."
- You will need your Employer Identification Number, mailing address, and email address.

How Tax Professionals can access a client's account:

- Log in with your Username and Password.
- Select "My Profile."
- Proceed to the "More" tab.
- In the Access panel, select "Request Third Party Access."
- You will need your client's Social Security Number or Employer Identification Number, and 8-digit Account ID to request access.
- Once your client grants access, you will be able to view and maintain their tax account.

GOT QUESTIONS? NEED HELP?

- Maine Revenue Services will offer free, live training webinars on how to use the Maine Tax Portal for Individual Income Taxes starting January 18, 2024. Visit maine.gov/revenue/mtpwebinarschedule to sign up. Training sessions will be recorded and posted on the website at maine.gov/revenue/webrecordings.
- Other resources on the Maine Tax Portal can be found at maine.gov/revenue/portal. Questions may be sent by emailing taxpayerassist@maine.gov with "MTP" in the subject line or by calling Maine Revenue Services at 207-624-9784.



Information for Individual Income Tax Clients

What clients need to know:

- Maine Revenue Services has a new online system called the Maine Tax Portal for filing and paying taxes. The Maine Tax Portal replaces EZ Pay, which has been deactivated.
- To make a payment on the new system, visit revenue.maine.gov, and in the “Individuals” panel, and follow the prompts. **You do not need to** set up a Username and Password on the Maine Tax Portal to make a payment or check on a refund.
- Setting up a Username and Password on the Maine Tax Portal **is required** to complete the following tasks:
 - View payment history.
 - View bills and notices from Maine Revenue Services.*
 - Request a payment plan.
 - Upload Power of Attorney Authorization.
 - Change contact information, such as addresses.
 - Authorize access to your account for a third-party, such as a tax professional.

How to set up a Maine Tax Portal Username and Password:

- Go to revenue.maine.gov and select “Create a Username.”
- You will need to provide:
 - Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN) **AND**
 - Amount due or refunded from one of the last three returns.
 - Federal Adjusted Gross Income from the Individual Income Tax Return **OR**
 - Letter ID from a letter received from Maine Revenue Services.
- If you would like to authorize a tax professional to access your account, take these steps:
 - Follow the instructions to create a Username and Password on the Maine Tax Portal.
 - Once you login, proceed to the “More” tab.
 - Select “Manage Access.”
 - In the Access panel select “Pending Third-Party Requests.”

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