



Department of Taxation

Tax.Ohio.gov

Tax Preparer - OH|ID Registration and
OH|TAX eServices Profile Creation

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Material displayed in this user guide is for informational purposes only.

Access to OH|TAX eServices logged-in user features require an OH|ID. If you have an OH|ID account, please use your username and password to **Log In** on the OH|TAX eServices homepage. (Skip to [Create OH|TAX eServices Profile](#))

If you do not have an OH|ID account, please click the **Log in or Create an OH|ID Account** hyperlink on the OH|TAX eServices homepage, then select the **Create Account** button. You will be redirected to the Create OH|ID Account web page and should follow the instructions to create an account.

NOTE: Full registration is a **2-Step** process, and you must complete both steps to access your OH|TAX eServices account.

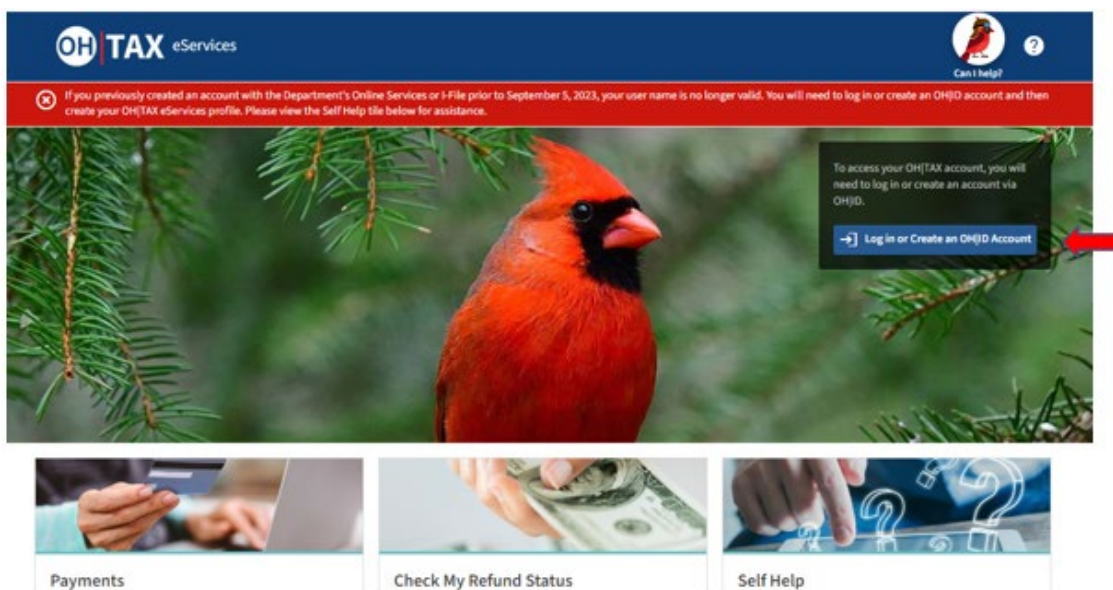
Professional preparers, must provide their:

- FEIN
- PTIN
- EFIN – if delegating client access to other preparers in their firm

OH|ID REGISTRATION

STEP 1 - To log in to OH|TAX eServices, you will need an OH|ID account. After your initial sign in to OH|ID, you will be redirected to the OH|TAX eServices registration page.

1. Click on the **Log in or Create an OH|ID Account** hyperlink.

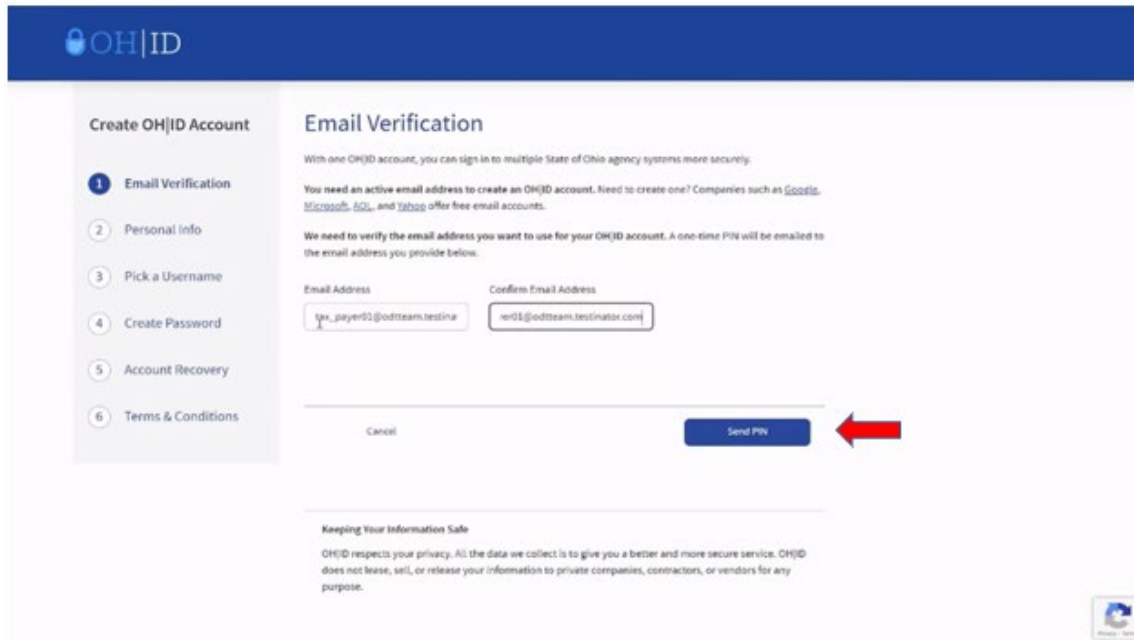


- The OH|ID login screen displays if you already have an OH|ID enter your username, password and click the **Log in** button, then you will be redirected the OH|TAX eServices registration page. (Skip to [Create OH|TAX eServices Profile](#)) If you do not have a OH|ID, click the **Create Account** button.

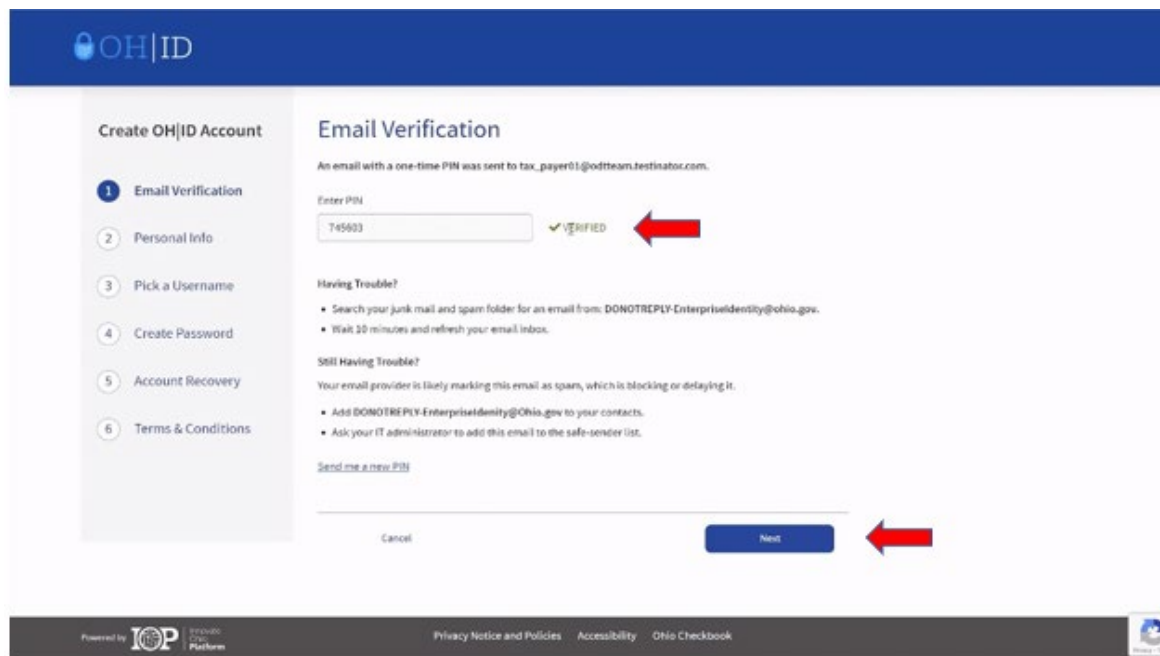
The screenshot shows the OH|ID login and registration interface. At the top, there is a logo for OH|ID with a blue padlock icon. Below the logo, the text reads "Ohio's Digital Identity. One State. One Account." and "Register once, use across many State of Ohio websites". A prominent blue button labeled "Create Account" is centered. Below this, a horizontal line separates the registration section from the login section. The login section is titled "Log In" and contains two input fields: "OH|ID" and "Password". The password field has a blue eye icon for toggling visibility. A blue "Log in" button is positioned below the input fields. At the bottom of the login section, there are three links: "Forgot OH|ID?", "Forgot password?", and "Get login help".

[Find out more about OH|ID >](#)

- The Email Verification screen displays, enter, and confirm your email address. Click the **Send PIN** button.



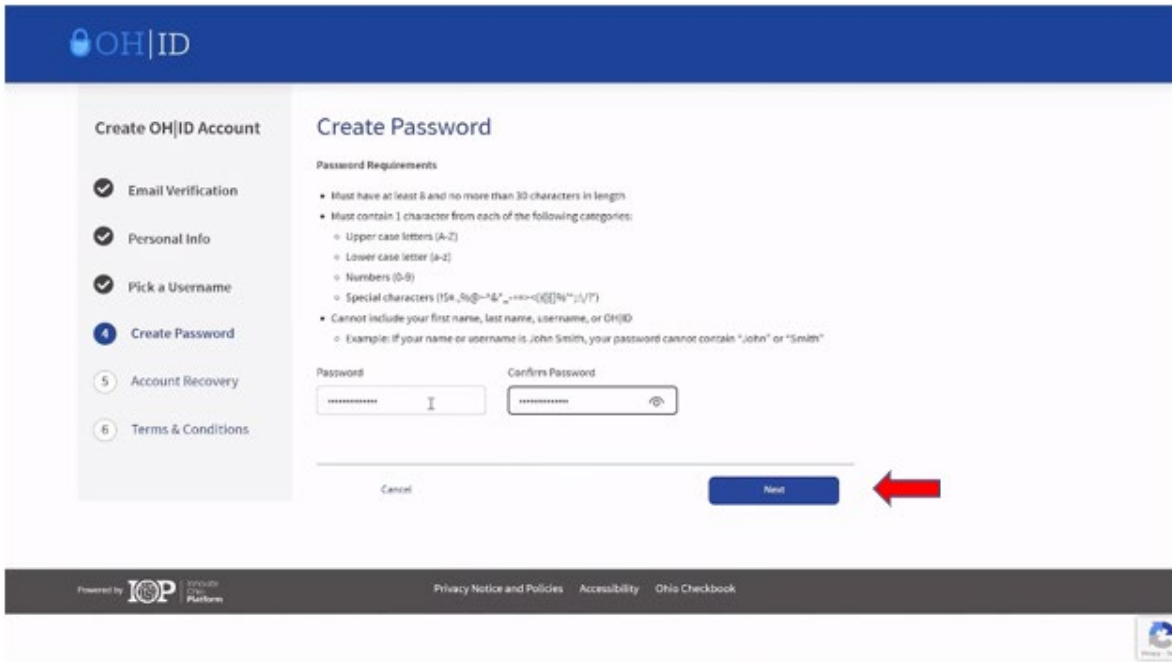
- Email Verification PIN screen displays, check your email, enter your PIN number, and click the **Verify** button. When you see the Verified message, click the **Next** button.



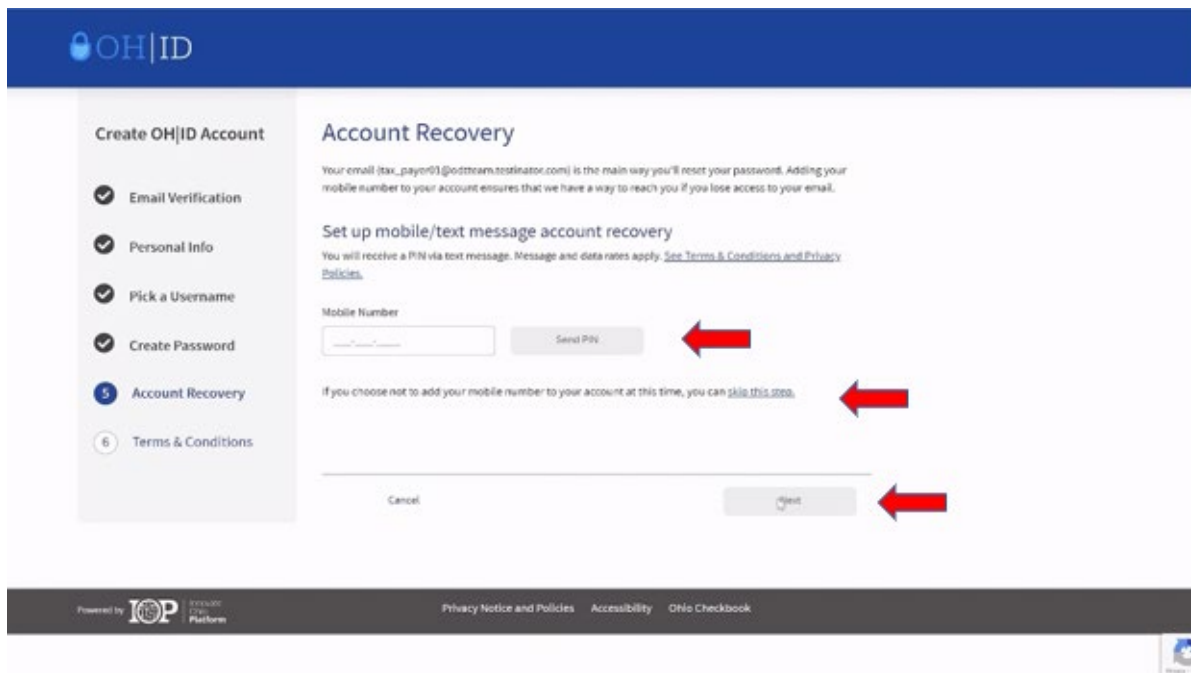
5. Personal Info screen displays, enter your first name, last name, date of birth, and the last 4 digits of the social security number is an optional field.

6. Pick a Username screen displays. Create a username and click the **Next** button. The requirements for the username are shown on the screen.

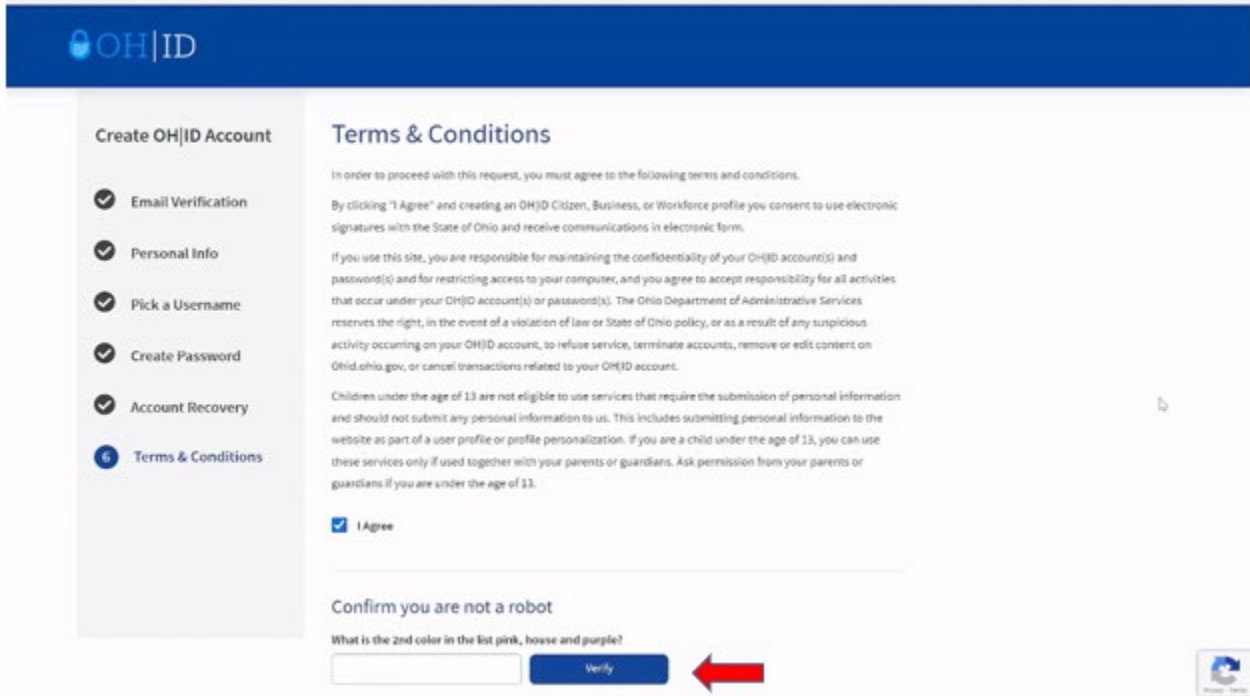
7. Create Password screen displays. Enter and confirm your password, then click the **Next** button. The requirements for the password are shown on the screen.



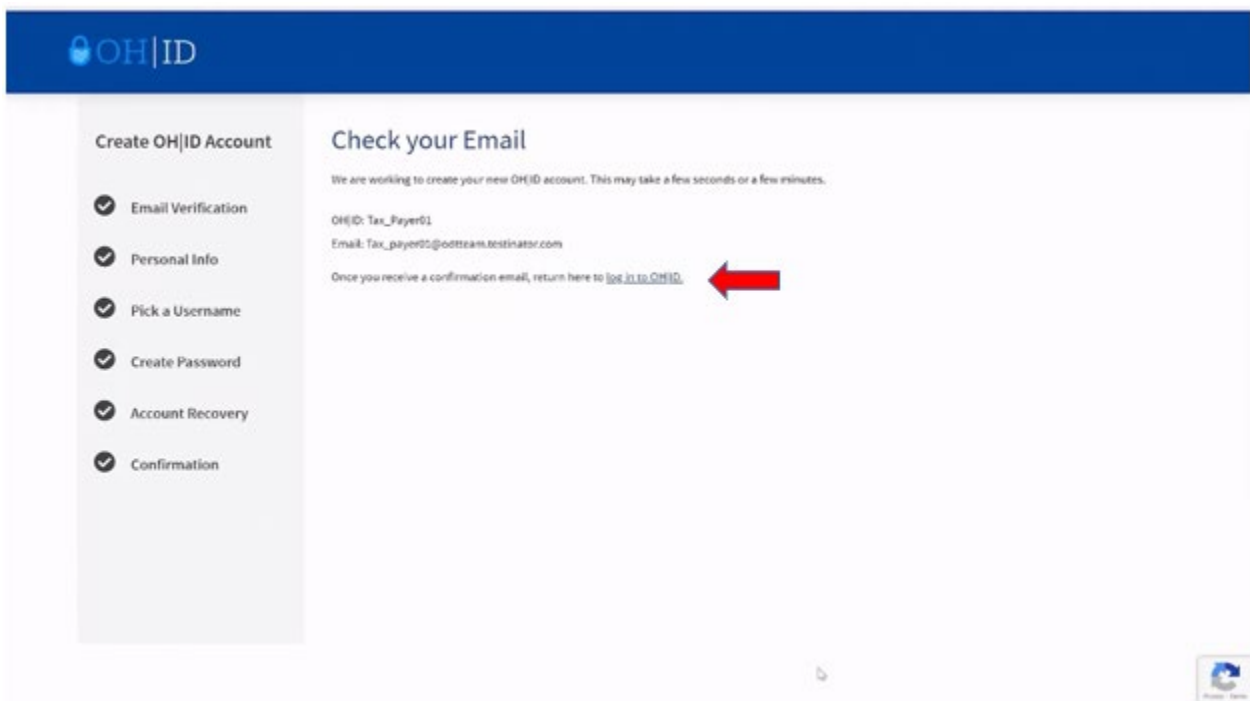
8. Account Recovery screen displays to set up an additional mobile/text message account recovery method. Enter your phone number and click the **Send PIN** button or you can click the **skip this step** hyperlink.



- Terms & Conditions screen displays. Check the **I agree** checkbox and answer the question to confirm you are not a robot. Click the **Verify** button, **Verified** message will be shown, and click the **Create Account** button.



- Check your Email screen displays. Once you receive your confirmation email, click the **log in to OH|ID** hyperlink.




11. You will be redirected to the OH|ID login screen. Enter your OH|ID username and password.

OH|ID
Ohio's Digital Identity. One State. One Account.
Register once, use across many State of Ohio websites

Create Account

Log In

OH|ID

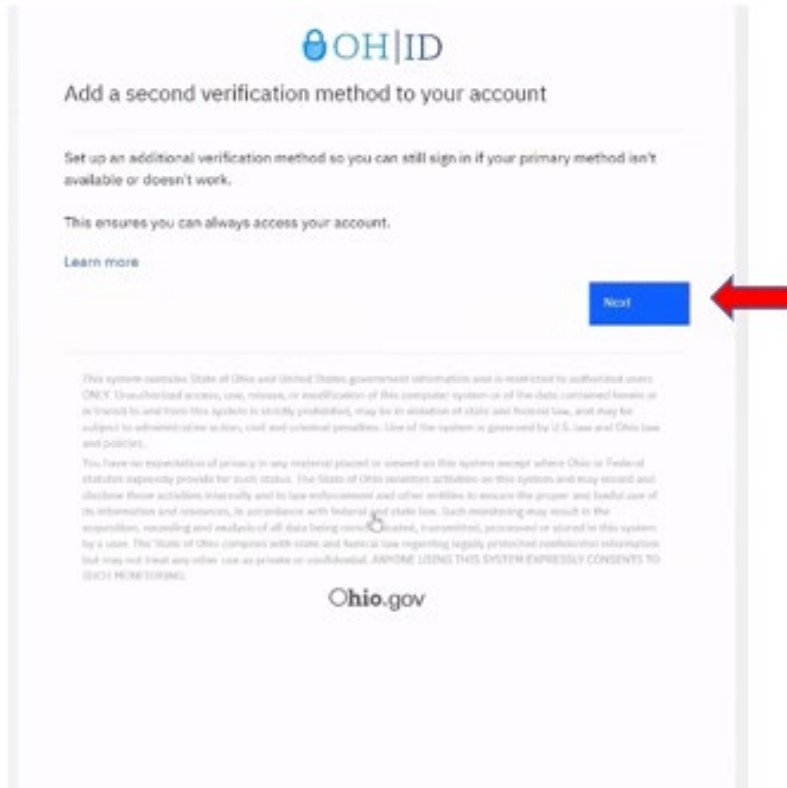
Password 

Log in

[Forgot OH|ID?](#) | [Forgot password?](#) | [Get login help](#)

[Find out more about OH|ID >](#)

- 12. You will be directed to add a second verification method to your account. The 2-Step verification process allows you to set up a second method of accessing your account and provides additional security.



13. Select your second verification method from the list and complete the set up. After you have completed this process, you will be able to log in to your OH|TAX eServices account.

OH|ID

2-Step Verification Enrollment

Status: 0 of 2 required methods set up

IBM Security Verify app Verify with a simple tap on your iOS or Android device with the IBM Security Verify app.	Add Device
Authenticator app Verify with a one-time access code that is generated by an authenticator app on your mobile phone or tablet.	Setup
Text message Verify by entering by a one-time PIN sent to your phone via SMS text. Standard message rates apply.	New number
Email Verify by entering by a one-time PIN sent to your email address.	New email
Phone call Verify by entering by a one-time PIN sent via voice call. Standard voice rates apply.	New number

This system contains State of Ohio and United States government information and is restricted to authorized users ONLY. Unauthorized access, use, misuse, or modification of this computer system or of the data contained herein or in transit to and from this system is strictly prohibited, may be in violation of state and federal law, and may be subject to administrative action, civil and criminal penalties. Use of the system is governed by U.S. law and Ohio law and policies.

You have no expectation of privacy in any material placed or viewed on this system except where Ohio or Federal statutes expressly provide for such status. The State of Ohio monitors activities on this system and may record and disclose those activities internally and to law enforcement and other entities to ensure the proper and lawful use of its information and resources, in accordance with federal and state law. Such monitoring may result in the acquisition, recording and analysis of all data being communicated, transmitted, processed or stored in this system by a user. The State of Ohio complies with state and federal law regarding legally protected confidential information but may not treat any other use as private or confidential. ANYONE USING THIS SYSTEM EXPRESSLY CONSENTS TO SUCH MONITORING.

OH|TAX ESERVICES PROFILE CREATION

STEP 2 - After you have created your OH|ID, you will be redirected to the OH|TAX eServices Registration Reason screen.

1. Mark the checkbox for **My clients - I am a CPA or a tax preparer working on behalf of a firm and want to manage taxes on behalf of my clients**. You can also mark the checkbox for **Myself - I want to have access to my own tax information with this profile** if you want to see both your personal and your client information.

The screenshot shows the 'OH|TAX eServices' header with a 'Can I help?' icon. Below the header, there is a navigation bar with a 'Home' link. The main content area is titled 'Create an OH|TAX Profile' and features a progress indicator for the 'Registration Reason' step. The registration reason section includes a question: 'Which of the following do you want to include in this profile? Select all that apply.' There are two checkboxes: one for 'Myself - I want to have access to my own tax information with this profile' (unchecked) and one for 'My clients - I am a CPA or tax preparer working on behalf of a firm and want to manage taxes on behalf of my clients' (checked). At the bottom of the form, there are 'Cancel', 'Previous', and 'Next' buttons. A red arrow points to the 'Next' button.

2. Create and OH|TAX Profile screen displays. Enter your information into the form and click the **Next** button. Elements marked with * are required.

The screenshot shows the 'Create an OH|TAX Profile' interface. At the top, there's a navigation bar with the OH TAX eServices logo and a 'Call for help?' icon. Below the navigation bar, the title 'Create an OH|TAX Profile' is displayed. A progress indicator shows two steps: 'Registration Reason' (completed) and 'Identity Information' (current step). The main form area is titled 'Your Identity Information' and contains several input fields: First Name, Last Name, Phone Type, Phone, Email Address, SSN (with a 'More info' link), Driver License State, Driver License Number, and Date of Birth. A second section titled 'Your Mailing Address' includes fields for Country, Street, Street 2, City, Zip, County, and State. A 'Verify address' button is located below the mailing address fields. At the bottom of the form, there are 'Cancel', 'Previous', and 'Next' buttons. A red arrow points to the 'Next' button.

3. Preparer Information screen displays. If you select **No**, click the **Next** button, and continue to Step 5. If you select **Yes**, continue to Step 4.

The screenshot shows the 'Create an OH|TAX Profile' interface at the 'Firm Information' step. The progress indicator shows three steps: 'Registration Reason', 'Identity Information', and 'Firm Information'. The main form area is titled 'Preparer Information' and contains a question: 'Are you working with a firm that has an EFIN and the ability to delegate access to other preparers?'. Below the question are two radio buttons: 'Yes' and 'No'. At the bottom of the form, there are 'Cancel', 'Previous', and 'Next' buttons. A red arrow points to the 'Next' button.

- 4. Select **Yes** and a form for inputting Firm Information displays. Complete the form and click the Next button.

OH|TAX eServices

Call I help?

< Home

Create an OH|TAX Profile

Registration Reason Identity Information Firm Information

Preparer Information

Are you working with a firm that has an EFIN and the ability to delegate access to other preparers?

Yes No

Firm Information

Firm Name: ABC TAXES

Firm FEIN: 99-9999999

PTIN: P12345678

EFIN: 123456

Firm Address

Street: 123 E MAIN ST

Street 2:

Unit:

City: COLUMBUS State: OHIO

Zip Code: 43215-5207 County: FRANKLIN

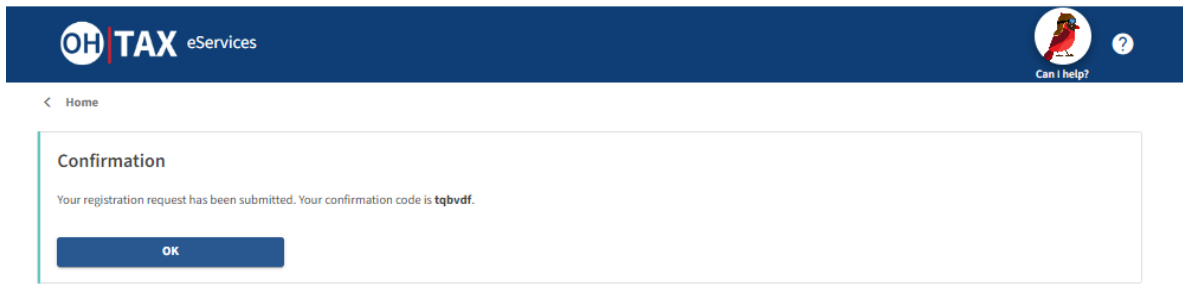
Address has been verified

Cancel Previous **Next** >

5. Review screen displays, verify information, and click the **Submit** button.



6. Confirmation screen displays, click the **OK** button.



7. Dashboard displays.

