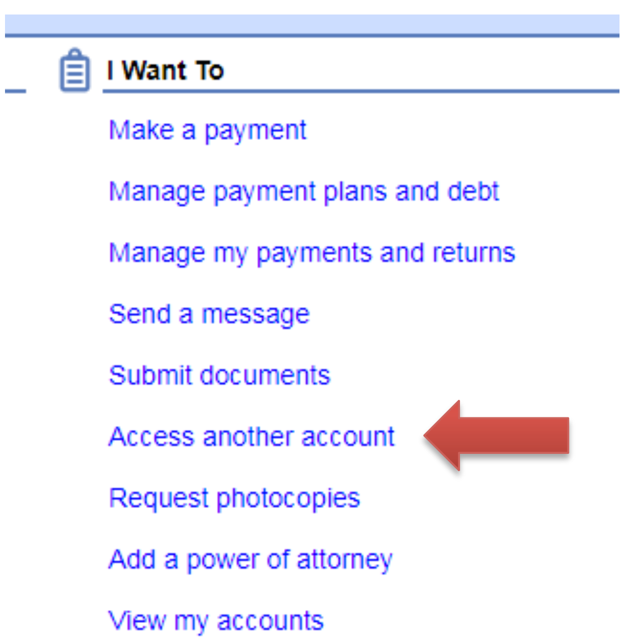
Tax practitioners: How to set up third-party access in Revenue Online

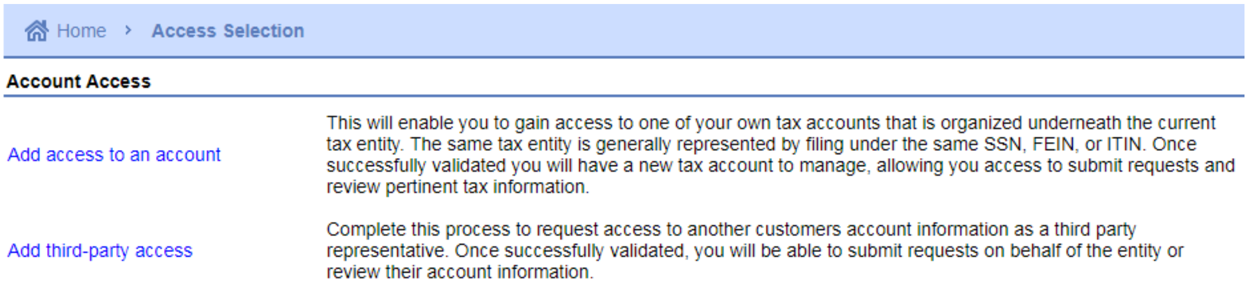
1. Create a Revenue Online account for yourself. You'll need:
   a. An email address.
   b. Social Security number (SSN) or federal employer identification number (FEIN).
      i. If self-employed, create your account using your own SSN.
      ii. If incorporated, create your account using the FEIN of the corporation or partnership.
   c. ZIP code.
   d. Business identification number (BIN) or account ID.
   e. One of the following from the client account you are trying to access:
      i. **Letter ID**—Located on any recent letter we've sent your client.
      ii. **Return amount**—A line from one of your three recent returns.
      iii. **Payment amount**—One of your three most recent payments.

      If you don't have any of this information, please call us at (503) 947-3541 for assistance.

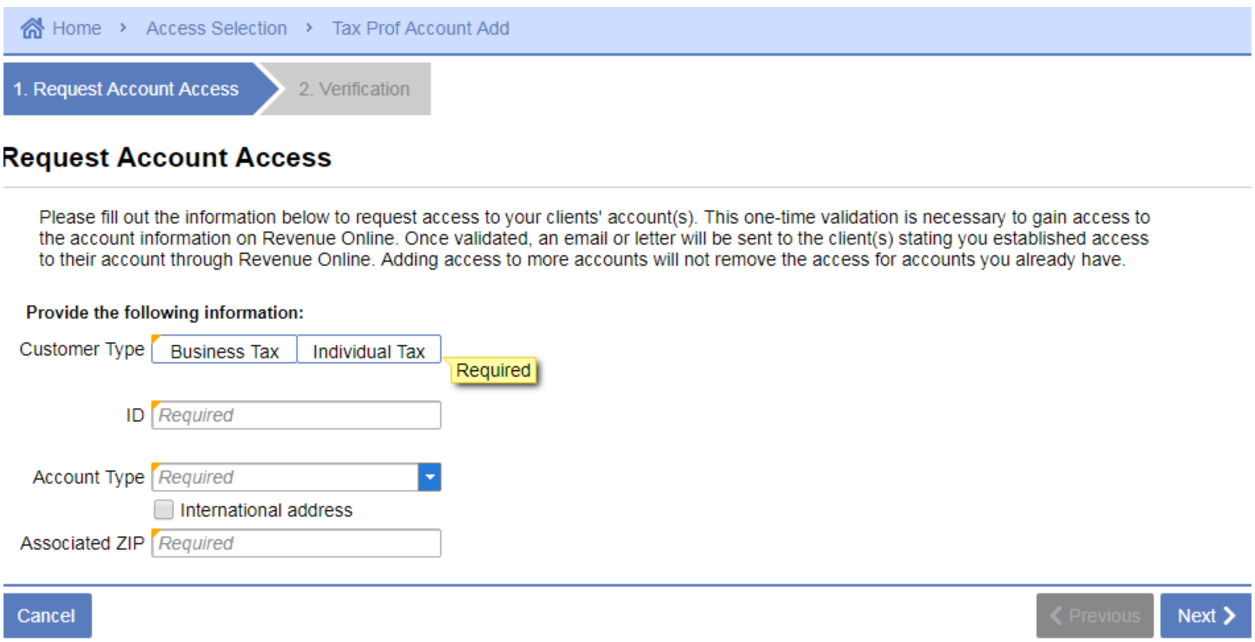
2. Log into your account and click on **Access another account** in the **I Want To** section on the upper right-hand side of your screen.



3. The next screen will display two choices. Choose **Add third-party access**.



4. The next screen will ask you to provide information for each client.



The system notifies the taxpayer when you establish access to their account in Revenue Online.

After you've established third-party access to your clients' accounts…

You'll be able to view details for each tax period, including account balances, tax, penalty, and interest amounts, and payments received. You can also file appeals and waiver requests and submit additional documents for your clients.

You will also be able to view most of the notices we've sent to your client by clicking on the **Correspondence** tab in their account:

If you or your clients have new messages or letters from us, you'll see alerts on your Revenue Online home screen. Clicking on the links will allow you to view the messages or letters.