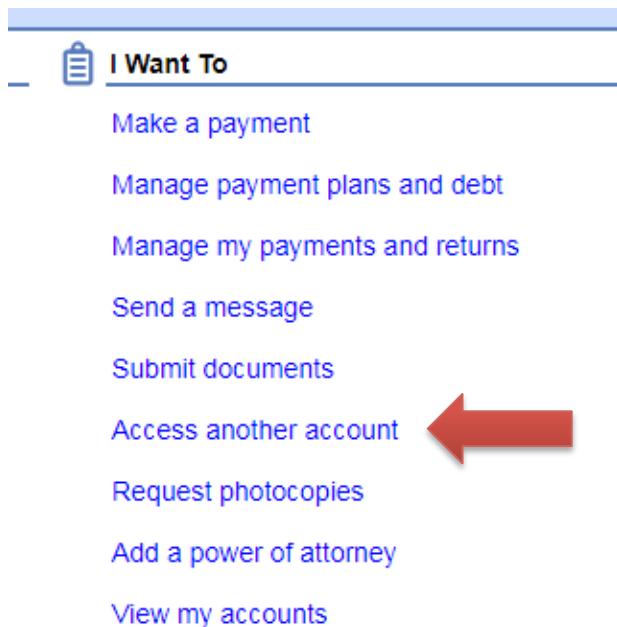


Tax practitioners: How to set up third-party access in Revenue Online

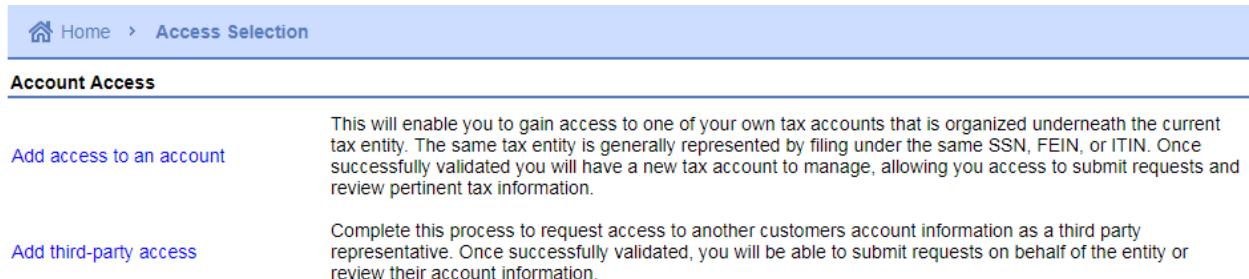
1. Create a Revenue Online account for yourself. You'll need:
 - a. An email address.
 - b. Social Security number (SSN) or federal employer identification number (FEIN).
 - i. If self-employed, create your account using your own SSN.
 - ii. If incorporated, create your account using the FEIN of the 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**.

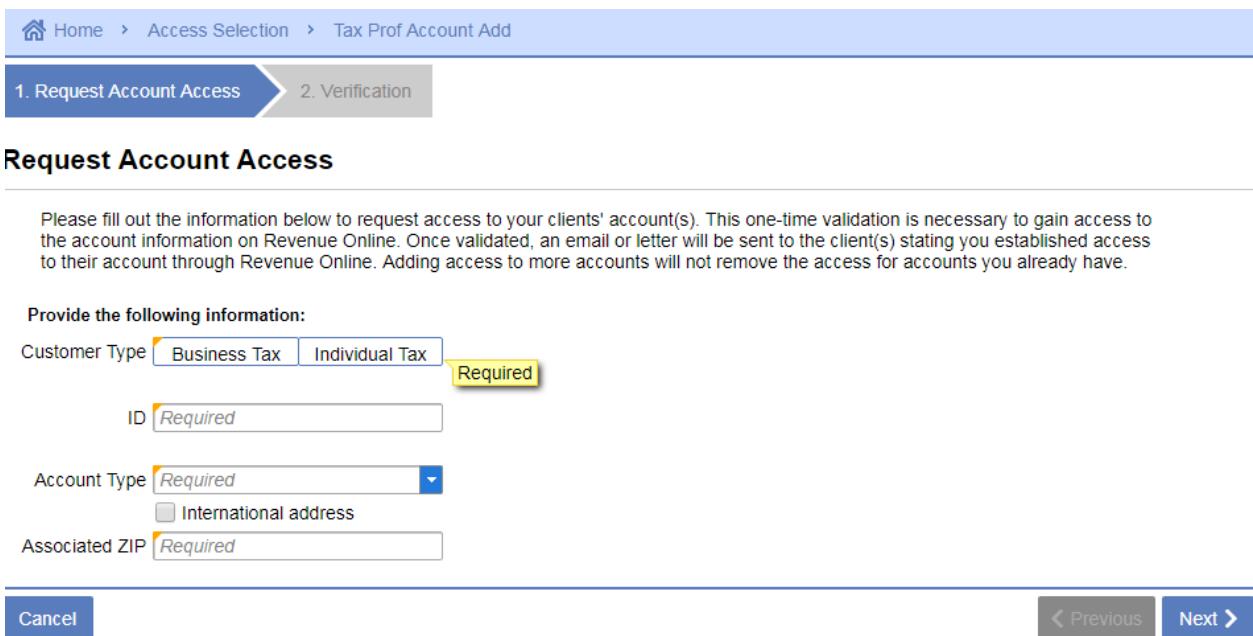


Account Access

[Add access to an account](#)
This will enable you to gain access to one of your own tax accounts that is organized underneath the current tax entity. The same tax entity is generally represented by filing under the same SSN, FEIN, or ITIN. Once successfully validated you will have a new tax account to manage, allowing you access to submit requests and review pertinent tax information.

[Add third-party access](#)
Complete this process to request access to another customers account information as a third party representative. Once successfully validated, you will be able to submit requests on behalf of the entity or review their account information.

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



Request Account Access

Please fill out the information below to request access to your clients' account(s). This one-time validation is necessary to gain access to the account information on Revenue Online. Once validated, an email or letter will be sent to the client(s) stating you established access to their account through Revenue Online. Adding access to more accounts will not remove the access for accounts you already have.

Provide the following information:

Customer Type Business Tax Individual Tax Required

ID Required

Account Type Required International address

Associated ZIP Required

[Cancel](#) [Previous](#) [Next](#)

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.

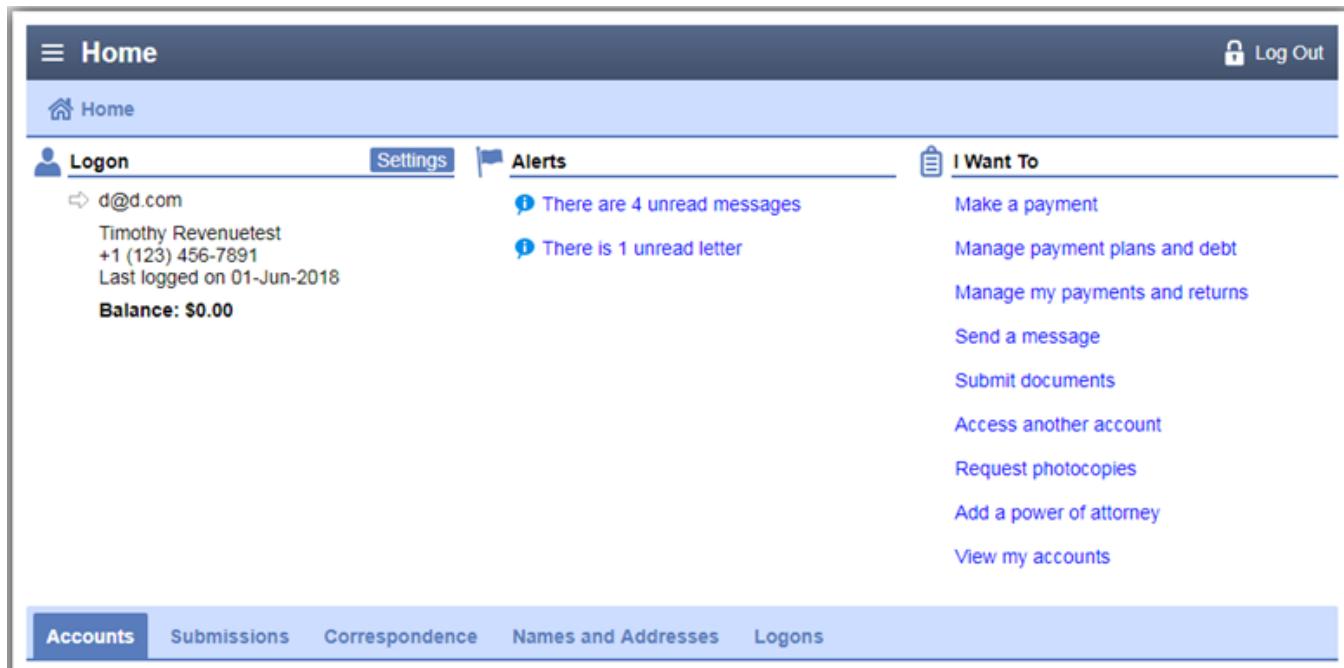
You will also be able to view most of the notices we've sent to your client by clicking on the **Correspondence** tab in their account:




Accounts Submissions Correspondence Names and Addresses Logons

 **Accounts**

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.



≡ Home  Log Out

 Home

 **Logon**  **Alerts**  **I Want To**

✉ d@d.com
Timothy Revenuetest
+1 (123) 456-7891
Last logged on 01-Jun-2018
Balance: \$0.00

There are 4 unread messages
There is 1 unread letter

Make a payment
Manage payment plans and debt
Manage my payments and returns
Send a message
Submit documents
Access another account
Request photocopies
Add a power of attorney
View my accounts

Accounts Submissions Correspondence Names and Addresses Logons