Creating a Tax Professional Revenue Online Account

Tax professionals can manage their clients' business or personal accounts through Revenue Online (ROL). The steps below will demonstrate how to register as a tax professional in ROL.

Important Notes:

- ✓ *The tax professional must first associate their ROL account to either the Company who employs them (not their client) or themselves (depending on the type of tax professional) when you get to the Validate Identity selection bar.*
- ✓ *The tax professional will have a chance to add access to their "clients' accounts" after the logon is created and upon logging into their newly established ROL account.*

1. Access the ROL homepage.
2. Click the New to Revenue Online? Sign up now hyperlink.

Progress Bar 1. Instructions

1. Informational sign-up instructions display. Instructions clarify who can use ROL and what information is needed to complete the registration process.
2. Click on the **Next** button.

Progress Bar 2. Customer Validation

1. From the **select your access type** drop-down menu, select *Tax Professional.*
    - Click the Examples–When should I use third-party access? hyperlink for more information.
2. Select the appropriate option from the drop-down menu for **Have you (or your company) ever filed a return for any program with the state of Oregon?**
    - If you selected yes, select the appropriate option from the drop-down menu for **Did you file as a business or an individual?**
    - If you selected no, select the appropriate option from the drop-down menu for **Would you like to access ROL as a business or an individual?**
3. Click the **Next** button.

Progress Bar 3. Representative Information

If you selected Yes to filing a return:

1. From the **ID Type** drop-down menu, select the applicable ID.
2. Enter the appropriate ID in the field provided.
3. Enter the legal name of the individual/business in the field(s) provided.
4. Update the country selection from the **Country** drop-down menu as needed.
    - Defaults to *USA.*
5. Enter the ZIP code of the location address in the **ZIP** field.
6. Toggle the "Do you want to access your own tax accounts?" **Yes/No** selector button as appropriate.

- Select the **No** selector button to only interact with client(s) accounts.

7. Click the **Next** button.

If you selected No to filing a return:

1. From the **ID Type** drop-down menu, select the appropriate option.
2. Enter identifier in the **ID** field.
3. Enter name of individual or business in the field(s) provided.
4. Enter mailing address in the fields provided.
5. Click the **Click Here to Verify Address** button.
6. The Address Search window opens. Click the hyperlink for the verified address.
7. Click the **Next** button.

Progress Bar 4. User Info

1. Enter an email address in the **Email/Username** field and confirm the email in the **Verify Email** field.
   - This will be your username, e.g., "test@example.com."
2. Enter the name of the individual the logon belongs to in **First Name** and **Last Name** fields.
3. From the **Phone Type** drop-down menu, select the appropriate option.
4. Enter the phone number in the field provided.
5. Enter the password for this logon in the **Password** and **Verify** Password fields.
   - Click the Password hyperlink to view password requirements.
6. From the **Secret Question** drop-down menu, select the applicable question.
7. Enter the answer to the secret question in the **Answer** and **Confirm Answer** fields.
8. Click in the Use my login email checkbox, if applicable.
   - If selected, the **Email** field defaults with the username.
   - Alternately, the user could complete the **Text Message Authentication** section.
9. Click on the **Next** button.

Progress Bar 5. Responsible Party Declaration

1. Toggle the "Are you the responsible party for this entity?" **Yes/No** selector button as appropriate.
2. Click on the **Next** button.

Progress Bar 6. Access Security

1. Toggle the "Do you want to allow any new logins?" **Yes/No** selector button as appropriate.
2. Toggle the "Do you want to allow 3rd party access?" **Yes/No** selector button as appropriate.
3. Click on the **Next** button.

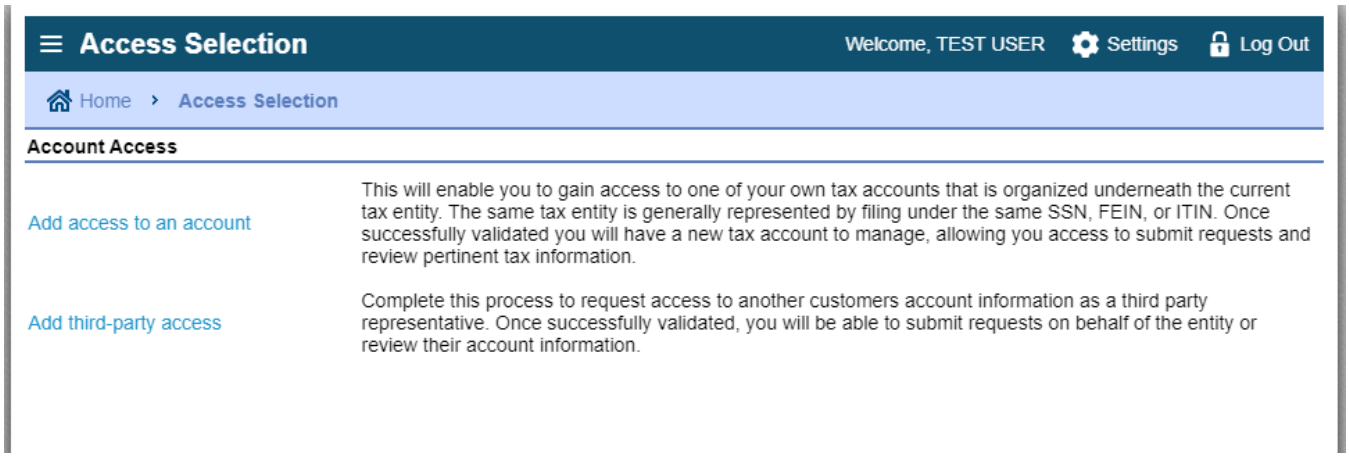
Progress Bar 7. Confirmation

1. Review information for completeness and accuracy.
2. Click the **Previous** button to make changes, or click the **Submit** button to complete registration.
3. A confirmation number is generated for this ROL registration. Click the **OK** button to return to the homepage and log in.

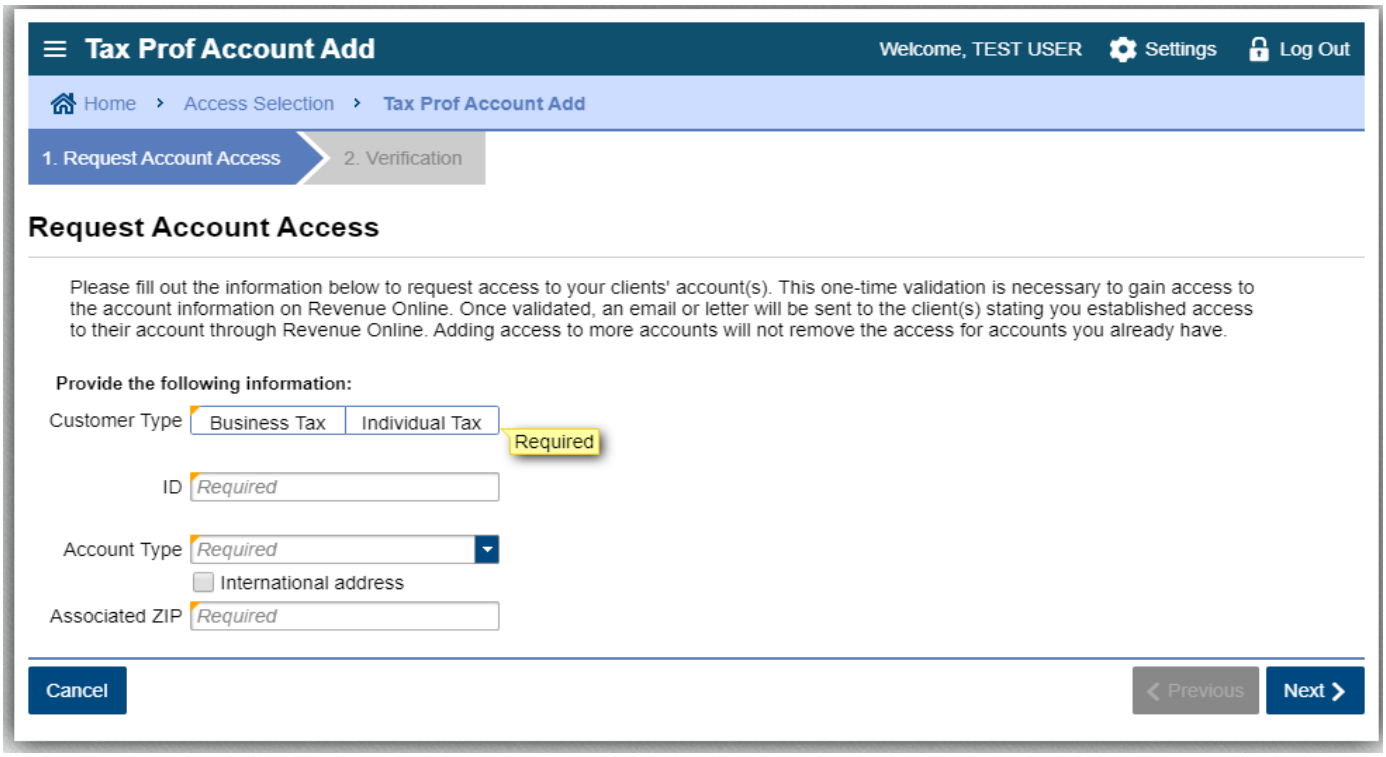
Setting up third-party access in Revenue Online

The steps below will show you how to add third-party access to your clients' tax accounts through ROL.

1. Log into your Revenue Online account.
2. From the Home springboard, beneath the **I Want To** section, click the **Access Another Account** hyperlink.
3. The next screen will display two choices. Click the Add third-party access hyperlink.



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



Progress Bar: 1. Request Account Access

1. Click the appropriate **Customer Type** button.
   - If the **Individual Tax Entity** button is selected, select the appropriate ID from the **ID Type** drop-down menu and enter the ID in the field provided.
   - If the **Business Tax Entity** button is selected, enter an ID in the **FEIN** field.
2. From the **Account Type** drop-down menu, select the appropriate tax account type.
3. Click in the **International Address** checkbox to select it, if applicable.
   - From the **Country** drop-down menu, select the appropriate country.
4. Enter a zip code in the **Associated Zip** field.
5. Click the appropriate radio button and complete the required field:
   - **Letter ID.**
   - **Payment Amount.**
   - **Return Line.**

Click the **Next** button.

Progress Bar: 2. Verification

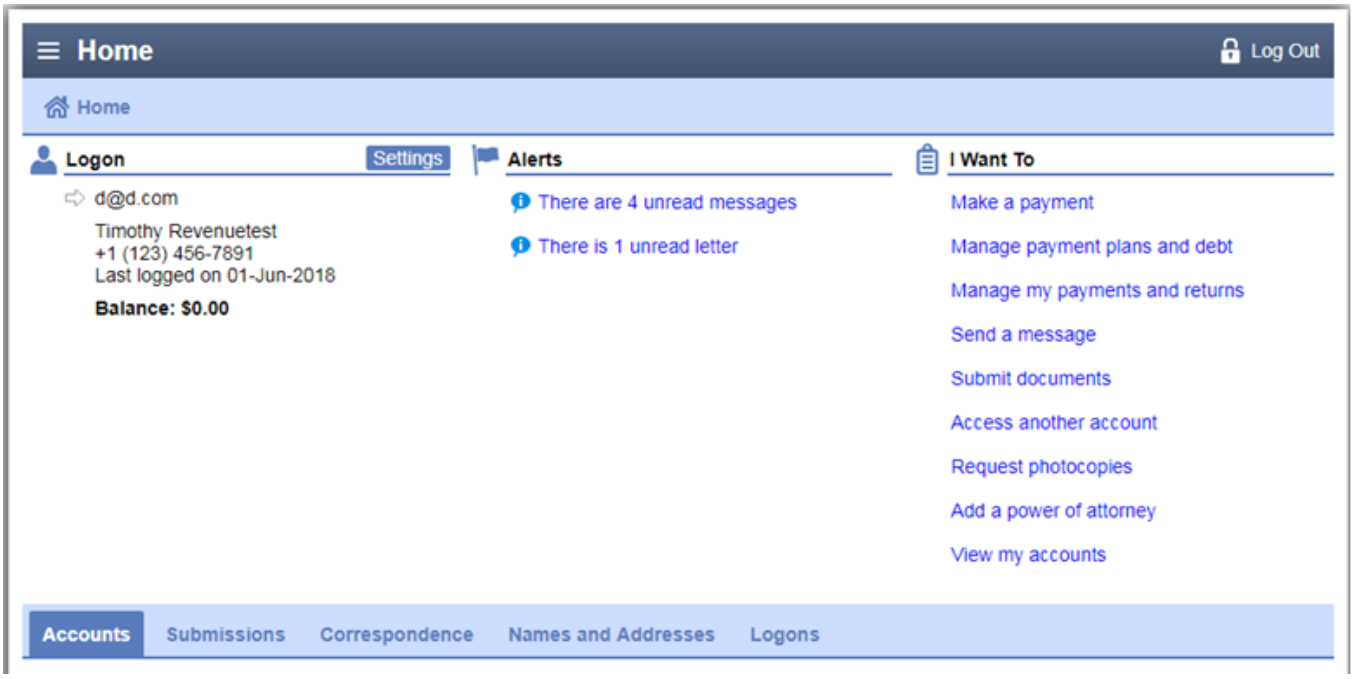
1. Review information for completeness and accuracy.
2. Click the **Previous** button to make changes, or click the **Submit** button to complete the request.
3. A confirmation number is generated for this ROL registration. Click the **OK** button to return to the Access Selection page.

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

Repeat the above steps for additional clients. Once all clients have been added, click the **Home** button to return to the logged-in homepage.

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.