

# Granting Tax Professional Access to a myVTax Account

One of the many convenient features of myVTax is the ability to give a third party, such as your tax professional, access to your tax account. Levels of access range from “View” only to allowing the third party to “View, File & Pay” your taxes. Before you begin, the third party must create an account in myVTax. Once registered, this person is recognized as an “Existing Third Party” with a username in myVTax. You must obtain the username to add the third party to your account.

## Step 1

Log into your **myVTax** account. From the home screen, click **Grant Accountant or Third Party Access**.

The screenshot shows the myVTax home interface. At the top right, there is a 'Log Off' button and a 'Logon Settings' link. Below this, the user's name 'BUSINESS TAXPAYER' and ID '\*\*\*16999' are displayed. An 'ALERTS' section shows an 'Outstanding balance: \$663.77'. The 'I WANT TO' menu is on the right, with 'Grant Accountant or Third Party Access' highlighted by a red circle. Below the menu, there are tabs for 'ACCOUNTS', 'ACTIVITY CENTER', 'NAMES AND ADDRESSES', and 'ACCOUNT SETTINGS'. The 'MY ACCOUNTS' section shows a table of accounts:

Account Type	ID	Name	Frequency	Balance
Sales and Use	SUT-10844392	GOOD BUSINESS	Monthly	\$663.77
Meals and Rooms	MRT-10844392	GOOD BUSINESS	Monthly	\$0.00

## Step 2

- 1 Enter the **Third Party Username** as provided by your tax professional or third party.
- 2 Verify that the name that appears in the **Name** field is the name of your tax professional or third party.
- 3 You may grant the accountant or third party named above the ability to designate others\* to access your account by selecting **Allow third parties to grant other logins access to my account(s)**. You can always revoke permission if you change your mind later. However, if you want only the person named above to access your account, select **Allow only this login to access my account(s)**.
- 4 Select the appropriate account type(s) that applies to your business.

The screenshot shows the 'My Accounts > New Login' page. It includes a section 'ADD ACCESS TO YOUR ACCOUNT' with a warning: 'Adding a third party will grant an already existing User ID within myVTax access to specific tax accounts for a specific time period. They will be able to view, file returns, and pay depending on their access level. This is typically used for third party tax preparers or accountants.' Below this is a 'SEARCH FOR EXISTING THIRD PARTY LOGIN' section with a text input field for 'Enter Third Party Username:' containing 'test3rdparty1' (marked with a red circle 1). A message states: 'If the username entered is verified, the name of the party will appear below. Please verify that this is correct before proceeding.' The 'Name:' field shows 'Joe's Accounting Firm' (marked with a red circle 2). There are two radio button options: 'Allow third parties to grant other logins access to my account(s)' (marked with a red circle 3) and 'Allow only this login to access my account(s)'. Below is a 'DEFINE ACCESS TO YOUR ACCOUNT(S)' section with a table of accounts and checkboxes for 'Add Access' (marked with a red circle 4):

Account Type	ID	Add Access
Meals and Rooms Tax	MRT-10062961	<input type="checkbox"/>
Sales and Use Tax	SUT-10062961	<input type="checkbox"/>
Withholding Tax	WHT-10062961	<input type="checkbox"/>

At the bottom, there are 'Previous', 'Add Access', 'Next', and 'Cancel' buttons.

\*You may authorize your accountant or third party to grant others access to your account. For example, if your accountant is reviewing your account and is called away to a family emergency, he or she can grant access to another accountant in the firm to review your account in his or her stead. This may be a discussion you have with your accountant before access is granted.

**Step 3**

Once you have granted the third party permission to access an account, you then must specify the tax year(s) for that account. The third party will not be able to access tax years outside of the range you designate.

**Which tax years do you wish to grant access to?**

Begin Tax Year  
 Month: January Year: 2012

End Tax Year  
 Month: December Year: 2016

The account you link will only have access to the specific tax periods you select. The access will be active for all tax periods ending between the first day of the month selected for beginning tax year, and the last day of the month selected for the ending tax year.

**Step 4**

Click on the down arrow to select the level of access you wish to grant your tax professional.

*Note: If the third party is registered using a Social Security Number, then the only option available is "View."*

**Which levels of access do you wish to grant?**

Access Level: View, File & Pay

- View
- View & File
- View & Pay
- View, File & Pay

**Step 5**

Confirm permission by checking **1** the box. Click **2** Submit to add the third party to your account.

I confirm I am granting the ability to view my return and return information, discuss my return information with the Vermont Department of Taxes, pay taxes on my behalf, and file a return on my behalf. **1** Required

**2**  **Submit** Cancel Save

