

Registering an Attorney account in myVTax

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What we will cover

- * We will go step by step through the attorney account registration process
- *  Pay special attention to the notes section at the bottom of each slide. Although the slides give you a visual glance at what you should be seeing with some limited information on features etc. The notes include detailed instructions for each step with tips and tricks to make the process easier. This will help to ensure the account is set up to work optimally for your use. 

Visit www.myvtax.Vermont.gov

WARNING! This is the Staging environment (VTS).



myVTax

Home

myVTax is a convenient and free service that allows you to manage, file, and pay your Vermont taxes.

- ✓ File returns securely
- ✓ Make payments
- ✓ Return filing verification
- ✓ File your Homestead Declaration or Property Tax Adjustment
- ✓ File an extension
- ✓ Check the status of your return
- ✓ Respond to correspondence
- ✓ Pay Use Tax

Log in to your myVTax account

Username:

[Forgot username?](#)

Password:

[Forgot password?](#)

Log In

[Need An Account? Click Here to Register](#)

Businesses

Individuals

Tax Professionals

Property Owners

Municipal Officials

Help & Resources

File a Return

Respond to Correspondence from the Department

Grant myVTax Access to my Tax Practitioner

File an Extension

Make a Payment

Access a Saved myVTax Request

Make sure you choose the correct account type

≡ Home

 Home > Add Access Type

For Businesses and Corporations

• Click here if you are a business taxpayer who would like to register your tax accounts or add myVTax access for accounts that are already registered with the Department.

For Individuals

Click here if you are attempting to request access to your existing Homestead Declaration, Renter Rebate, or Personal Income Tax account

myVTax Access code

• Click here if you have already received a myVTax Access Code and want to activate your account(s).

Accountants, Other Tax Professionals, Attorneys, and Landlords

• Click here if you are an accountant, other third party tax professional, attorney, or landlord 

Instructions Step

The instructions step is more of a clarification step to determine if you should really be registering as a third-party professional. As noted on the last slide this will be your account to use as a professional to file returns on behalf of your clients.

Home > Add Access Type > myVTax 3rd Party Registration

1. Instructions 2. User Information 3. Demographic Information 4. Web Account 5. Security Token Selection

Enrollment Application

Proceed only if you are an accountant, payroll service representative, other third party tax professional, landlord, or attorney.

Eligibility	Information Needed to Continue
All accountants, payroll services, other third party professionals, landlords, and attorneys	Please have the following information ready: <ul style="list-style-type: none">• New third-party username• ID number (e.g., PTIN, FEIN)• A valid email address

Clicking the "next" button will bring you to the next step on **all** myVTax requests.

If you click to cancel your request you will be asked to confirm, because once cancelled a request cannot be retrieved by you or the Department.

< Previous Next > Cancel



VERMONT
DEPARTMENT OF TAXES

Entering your “user information”

myVTax 3rd Party Registration

Home > Add Access Type > myVTax 3rd Party Registration

1. Instructions

2. User Information

3. Demographic Information

4. Web Account

5. Security Token Selection

Basic User Information

★ Which type of third party entity are you?

ID Type:

ID Number:

Legal Name:


 

Select “attorney” here. Note that anytime you click into a field and see the small  information bubble you can click on that bubble for more information.

Enter personal or business address

Check here if you are self-employed

Firm Information

Firm EIN

Firm Name

< Previous

Next >

Cancel

Not part of a firm, or self employed?

myVTax 3rd Party Registration

Home > Add Access Type > myVTax 3rd Party Registration

1. Instructions | **2. User Information** | 3. Demographic Information | 4. Web Account | 5. Security Token Selection

Basic User Information

Which type of third party entity are you?

ID Type:

ID Number:

Legal Name:

Enter personal or business address

Check here if you are self-employed 

Firm Information

Firm EIN:

Firm Name:

Notice the breadcrumb trail. The darkest color breadcrumb shows the step you are on now, lighter colored are completed steps, and medium colored are steps yet to be completed .

1. Instructions

2. User Information

3. Demographic Information

4. Web Account

5. Security Token Selection

An orange karat in the upper left corner denotes required fields

Please enter a valid email address

Email Address

Required

Confirm Email Address

Required



Required

Enter Business Phone Number(s) Below

Phone Type 1:

Required

Number:

USA

Phone Type 2:

Number:

USA

< Previous

Next >

Like the information bubble inside a field you may also see a question mark  information bubble outside of a field. Clicking on this bubble will provide you with helpful information.

Please enter a valid email address

Email Address

Confirm Email Address

 A valid email address is required for all myV/Tax processes. 

Enter Business Phone Number(s) Below

Phone Type 1: Number:

Phone Type 2: Number:

[< Previous](#) [Next >](#)

User name password and Secret Question

1. Instructions

2. User Information

3. Demographic Information

4. Web Account

5. Security Token Selection

Setup Your Web Account

Create a unique username and password to access your account(s) with the Vermont Department of Taxes.

Username: (Must be unique, at least 6 characters in length with no spaces, and only contain letters and numbers)

Username:

Required

Password: (Case sensitive)

Password:

Confirm:

Your password must contain at least eight characters and meet the following criteria:

- Contain both lower and upper case letters.
- Contain at least one number.
- Contain at least one special character.
- Your passwords cannot be your username.

Secret Question and Answer: (Not case sensitive)

Question:

Answer:

Confirm:

Note: Passwords cannot be reused.

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Next >

What are Security Tokens

1. Instructions

2. User Information

3. Demographic Information

4. Web Account

5. Security Token Selection

Select your security token preference

A security token is a 6 digit randomly generated code that is required in order to log in from a new computer, or one that is not trusted. When you complete the process to sign up for myVTax, a token will be automatically generated and sent to you via email. From there, subsequent tokens will be sent to you via the method you select below.

Send me security tokens via text message:



Send me security tokens via email



< Previous

Submit



notice the "next" button is now the "submit" button. This just means you are on the last step of a myVTax request. You can still cancel the request or go back to make changes before submitting.

Cancel

What method should I choose to get my security tokens?

Get tokens by text message

Select your security token preference

A security token is a 6 digit randomly generated code that is required in order to log in from a new computer, or one that for myVTax, a token will be automatically generated and sent to you via email. From there, subsequent tokens will be

Send me security tokens via text message:

Security Token Phone Carrier:

Country:

Security Token Phone Number:

Required

Send me security token

MUST be a valid cell phone number do not enter a land line phone number.

< Previous

Submit

Get tokens by email message

Select your security token preference

A security token is a 6 digit randomly generated code that is required in order to log in from for myVTax, a token will be automatically generated and sent to you via email. From there,

Send me security tokens via text message:

Send me security tokens via email

Security Token Email Address:

< Previous

Submit

Confirmation email



Tue 06/04/2019 2:17 PM

TAX - myVTax Info <myVTaxInfo@vermont.gov>

Testing: VTS myVTax Online Registration Complete

To Woods, Marylee

Any system generated messages will come from a myVTax email address.

This is an automated message from the Vermont Department of Taxes regarding your myVTax account. Please do not respond to this email directly.

Welcome to myVTax!

We have processed your registration for Username: ATTORNEYTEST

The first time you login to myVTax, the security token ~~XXXXXX~~ will be required.

[Click here to login](#)

Your confirmation number for this request is: 1-720-876-032

Contact information:

Vermont Department of Taxes Call: (802) 828-6802

133 State Street

Or Email: [myVTax Support](#)

Montpelier, VT 05602-3667

Username and Password

Because I clicked the link in my confirmation email to login, myVTax automatically entered my username for me. This won't happen every time you access myVTax to log in.

You will need to enter the password you created when creating your account remember the password is case sensitive so you will need to enter each character exactly as you entered in before paying attention to upper and lower case

Once you have entered your password click to log in.

yes.

Log in to your myVTax acco

Username:

ATTORNEYTEST x

[Forgot username?](#)

Password:

[Forgot password?](#)

Log In

[Need An Account? Click
Here to Register](#)

Security Tokens

Paste or enter your security token in the field allowed.

Click yes or no to “Trust This Browser” if you choose “no” you will need to get a new security token each time you use the computer or device you are using if you use it again to sign in later.

If you are using a computer or device that you don't normally use, or one that is not yours just to sign in once or occasionally you should not trust that browser.

If you are signing in from your computer, or one that you use most often. If others aren't likely to use it then generally it is safe to say “yes” to trust that browser.



Security Token

A security token was sent to you.

Security Token

If you copied your security token from the confirmation email right click your mouse and paste it in this box. If not manually enter it here.



Trust This Browser

 

The third party "Attorney" account home screen

 Welcome, LEGAL NAME OF ATTORNEY  Settings  Log Off

 Home

 **Logon**
LEGAL NAME OF ATTORNEY
example@vermont.gov
+1 (802) 555-5555
Last logged on Jun-29-2019

 **Alerts**
✔ There are no alerts

 **I Want To** 

- Update Return Signature
- Create Additional Username
- File a Real Estate Transaction Tax Return
- Request a Commissioner's Certificate
- Add Access to Client Accounts
- Access an Existing Web Request
- Send us a message

 **Attorney View⁰** Attorney View Closed Certificate View Certificate View Closed Accounts Submissions Correspondence

Attorney 

Closing Date	Verification Cod	Transferee Name	Transferor Name	Street	City	Status	Title
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