

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**.

Accounts	Submissions	Correspondence	Names and Addresses	Logons
Meals and Rooms	Quarterly	MRT-10958001	GOOD BUSINESS	\$0.00
Sales and Use	Quarterly	SUT-10958001	GOOD BUSINESS	\$0.00
Withholding	Quarterly	WHT-10958001	GOOD BUSINESS	\$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.

Add Third Party Access

1. Add Access

Add Access to Your Account
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.

Search for Existing Third Party Login
Enter Third Party Username: 1

If the username entered is verified, the name of the party will appear below. Please verify that this is correct before proceeding.

Name: 2

Do you wish to allow your accountant or other third party to access your account with logins other than the one listed above?
 Allow third parties to grant other logins access to my account(s) 3
 Allow only this login to access my account(s)

Define access to your account(s)
You must select at least one account before continuing

Account Type	ID	Add Access
Meals and Rooms	MRT-10958001	<input type="checkbox"/> 4
Sales and Use	SUT-10958001	<input type="checkbox"/>
Withholding	WHT-10958001	<input type="checkbox"/>

Next > Cancel Save Draft

*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.

Define Access for Meals and Rooms Tax Account

I hereby designate **Joe's Accounting Firm** to be my duly authorized representative for tax purposes. The Vermont Department of Taxes may disclose my return and return information to **Joe's Accounting Firm** as long as this authorization is effective. I understand that I can revoke this authorization at any time by removing access for **Joe's Accounting Firm** on my Vermont Taxpayer Access Portal account.

Which tax years do you wish to grant access to for your Meals and Rooms Tax Account?

Begin Tax Year
 Month: Year:

End Tax Year
 Month: Year:

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. You cannot grant access to tax years more than 5 years into the future.

Step 4

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

Which levels of access do you wish to grant?

Access Level:
 Required

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

View and File Returns	Allows the ability to file returns.
View and Make Payments	Allows the ability to make payments.
View Only	Allows the ability to view accounts.
View, File Returns, and Make Payments	Allows the ability to file returns and make payments.

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

