myVTax Guide: How to Submit a Third-Party Authorization

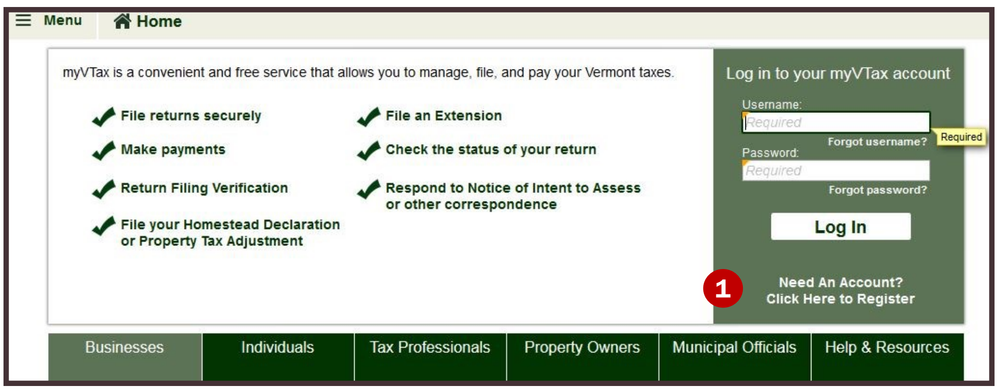
As a tax professional, you may find it convenient to access your clients' tax accounts in myVTax, the Vermont Department of Taxes secure online filing service. If your client gives you permission, you may request access by submitting an online form in myVTax.

Here are the basic steps to request access:

1. Register an online account on myVTax as a third party.
2. Submit a third-party access request.
3. Print out the third-party authorization form, have your client sign it, then submit the form to the Vermont Department of Taxes for processing.
4. The Department of Taxes will verify the information, process the request, and connect you with your client.

This guide provides step-by-step instructions on how to complete the form and submit it to us.

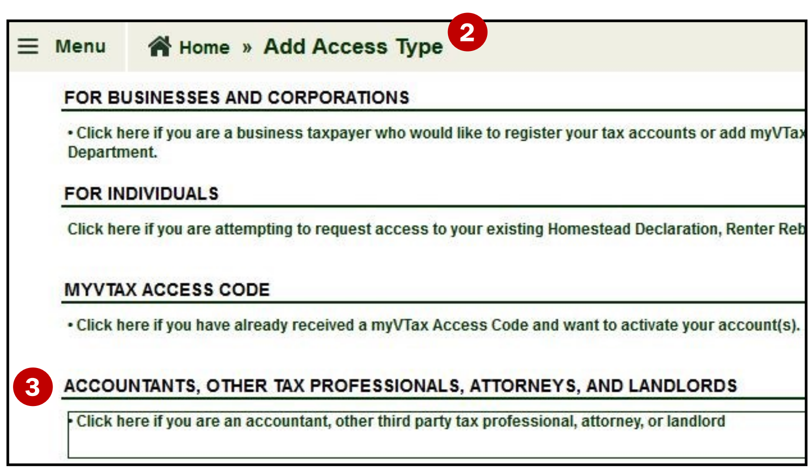
Step 1



Go to **www.myVTax.vermont.gov**.

Before you begin to complete the form, you should have your own myVTax account. If you don't have one, do the following to set up an account:

- Click 1 **Need An Account? Click Here to Register.**
- On the next screen 2 **Add Access Type**, select 3 **Accountants, Other Tax Professionals, Attorneys, and Landlords** and follow the instructions to set up an account.



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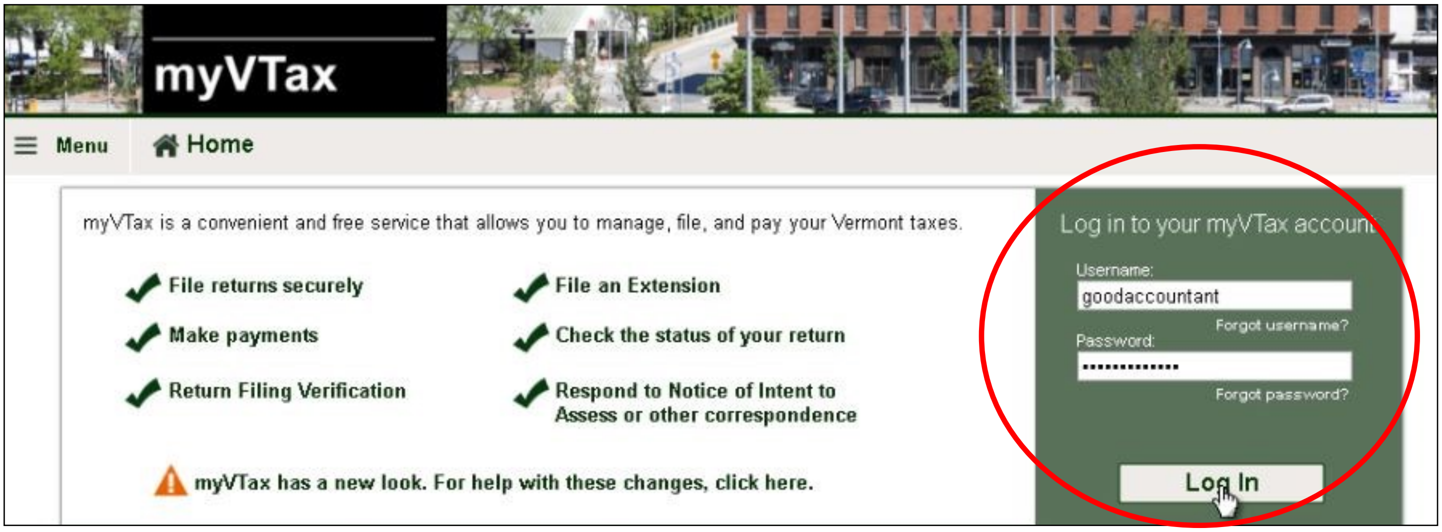
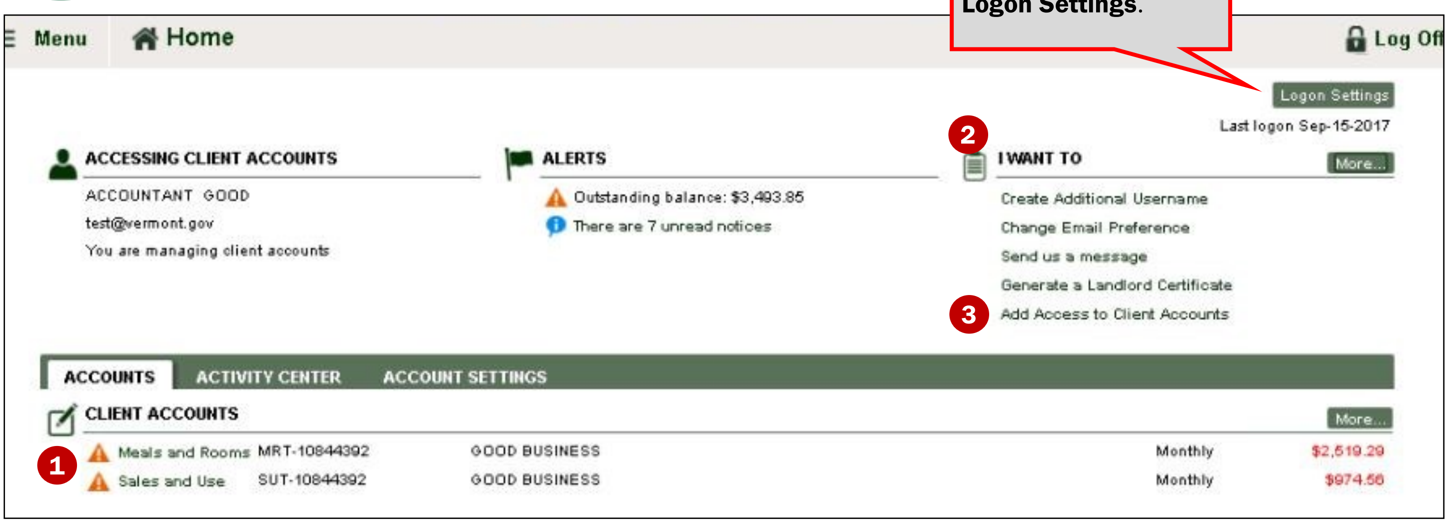
Step 2



Enter your **Username** and **Password**. Click **Log In**.

You may edit your information through **Logon Settings**.

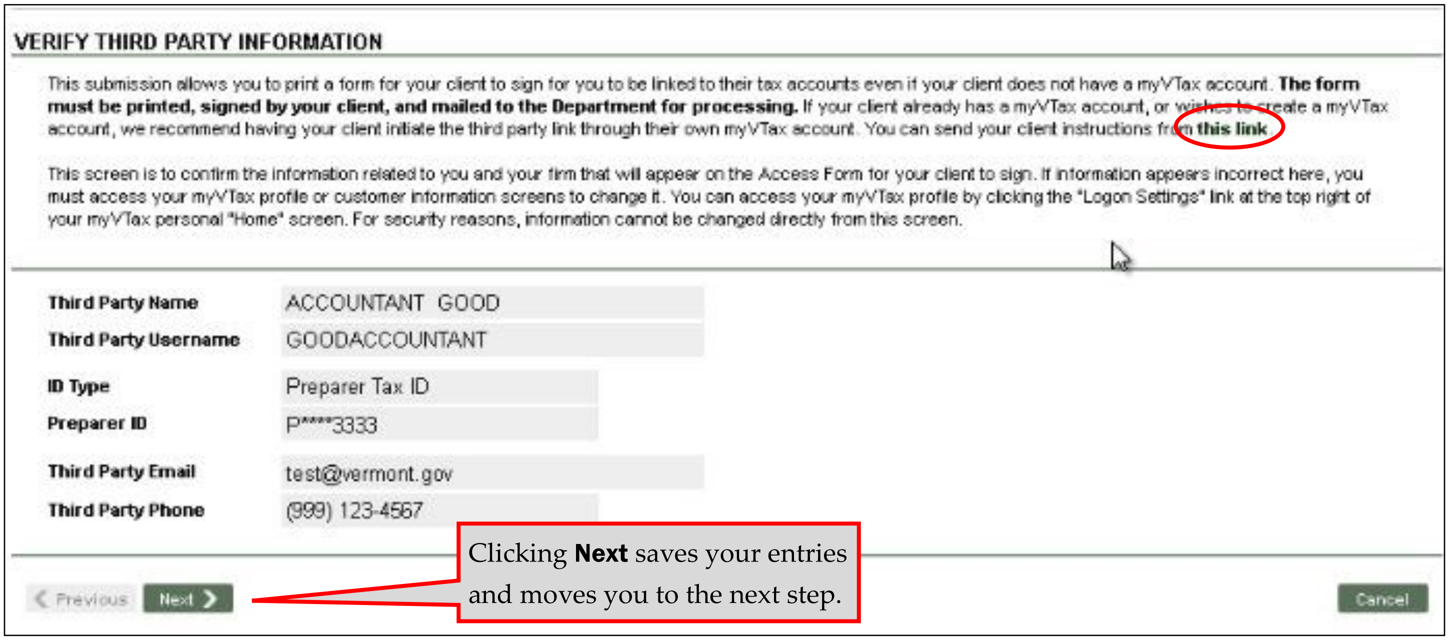
Step 3



On your Home screen, you will see **1** any accounts to which you have already been granted access. If you want access to other client accounts, find the list of functions under **2** **I WANT TO** and click **3** **Add Access To Client Accounts**.

Step 4

Verify Third Party Information

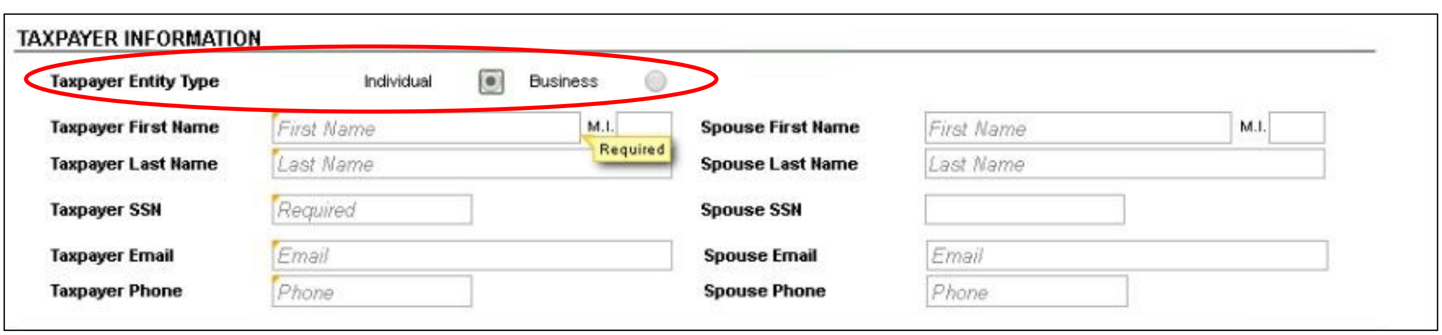


Your information is shown here. You will not be able to edit these fields. If information is incorrect and you wish to change it, you will have to return to **Logon Settings** on the Home screen and make edits in your myVTax profile.

The client does not need to have his or her own account for you to access the account. If your client **does not have** a myVTax account, this is the process you should follow to obtain access to the client's accounts. If, however, your client has a myVTax account, we recommend the client initiate the process from his or her account. You can send instructions to your client by clicking **this link.**

Step 5

Taxpayer Information—Individual

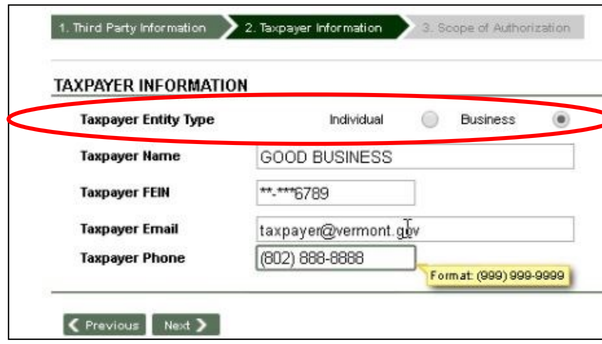


Enter the information for the client whose account you are requesting access. Choose the Taxpayer **Entry Type—Individual or Business.** The example above shows the form for the **Individual**. Move on to Step 6 to see the form for a **Business**. **Note:** all fields marked with an orange caret are required fields.

Step 6

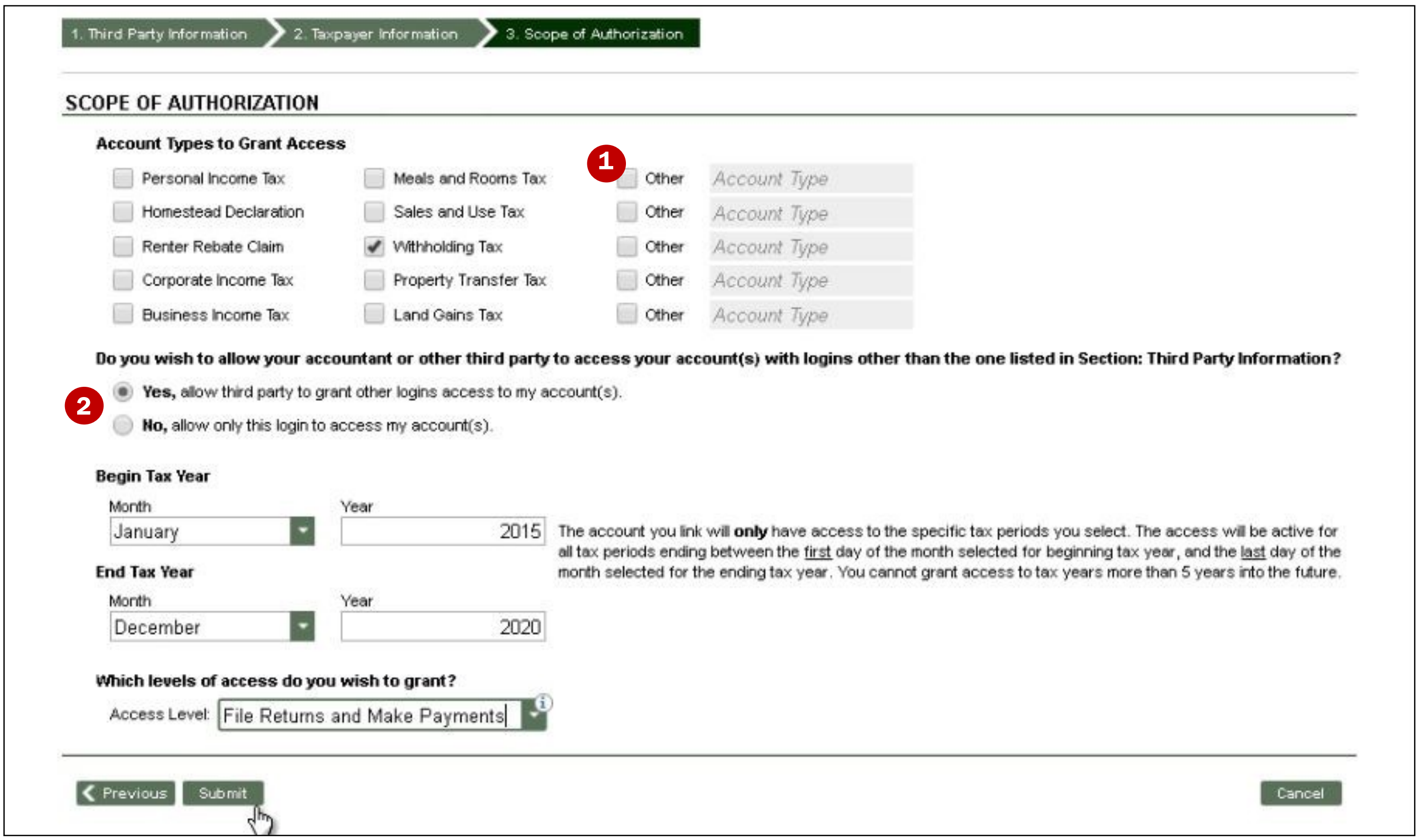
Taxpayer Information—Business

This is the view for a business taxpayer. Enter the taxpayer information requested as shown in the example. It important to enter a phone number or email if the Department has questions for the client about your request.



Step 7

Scope of Authorization

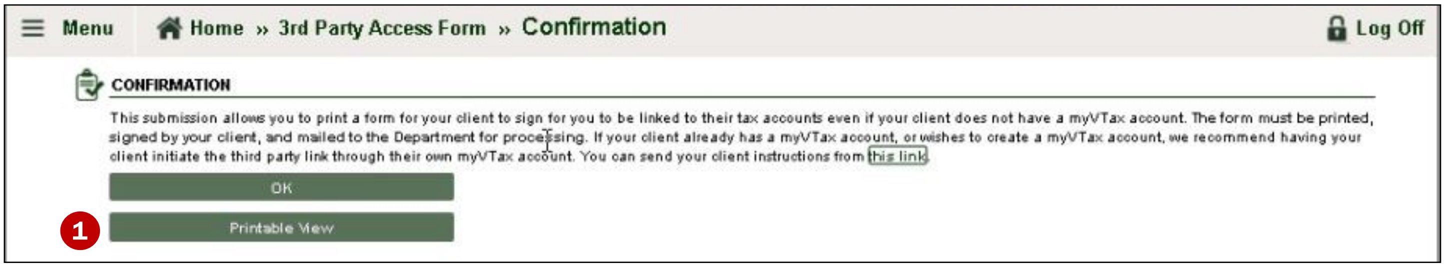


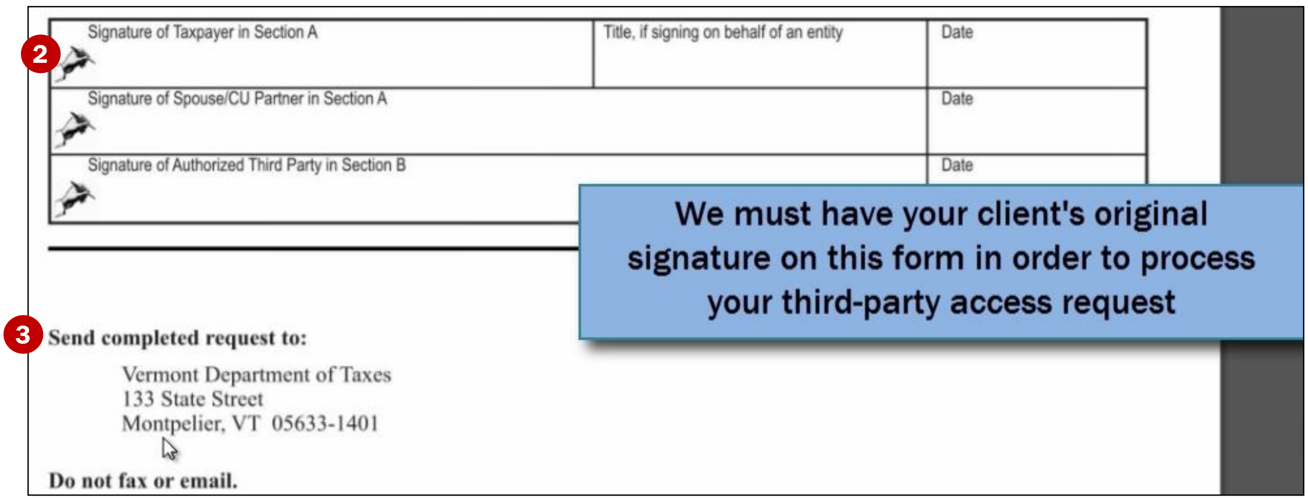
Please complete the following:

- **Account Types to Grant Access**—You may select more than one account type. Check 1 **Other** for a drop down menu listing more account types.
- **Do you wish . . . Third Party Information**—If you want authorization to add other third parties, such as accountants in your company, click 2 **Yes**. Otherwise, click **No**.
- **Begin Tax Year** and **End Tax Year**—If you want access to more than one tax year, enter the month/year that begins the first year and the month/year that ends the last year. Example: Begin with January 2012 and end with December 2016.
- **Which levels of access do you wish to grant?**—Click the drop down box and select from the list. To obtain all levels of access, select **File Returns and Make Payments**.
- Click **Submit** to receive confirmation.

Step 8

Confirmation





The Confirmation page tells you that you have submitted the form successfully. But wait . . . there's more to do!

1. Print the form by clicking **Printable View.**
2. The Department of Taxes requires that you have the client sign the form. The client's **original signature** must be on this form in order to process your request.
3. Mail the completed and signed form to the Department using the address provided. Do **not** fax or email the form to us.

Clicking **OK** brings you back to the Home screen.