

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.

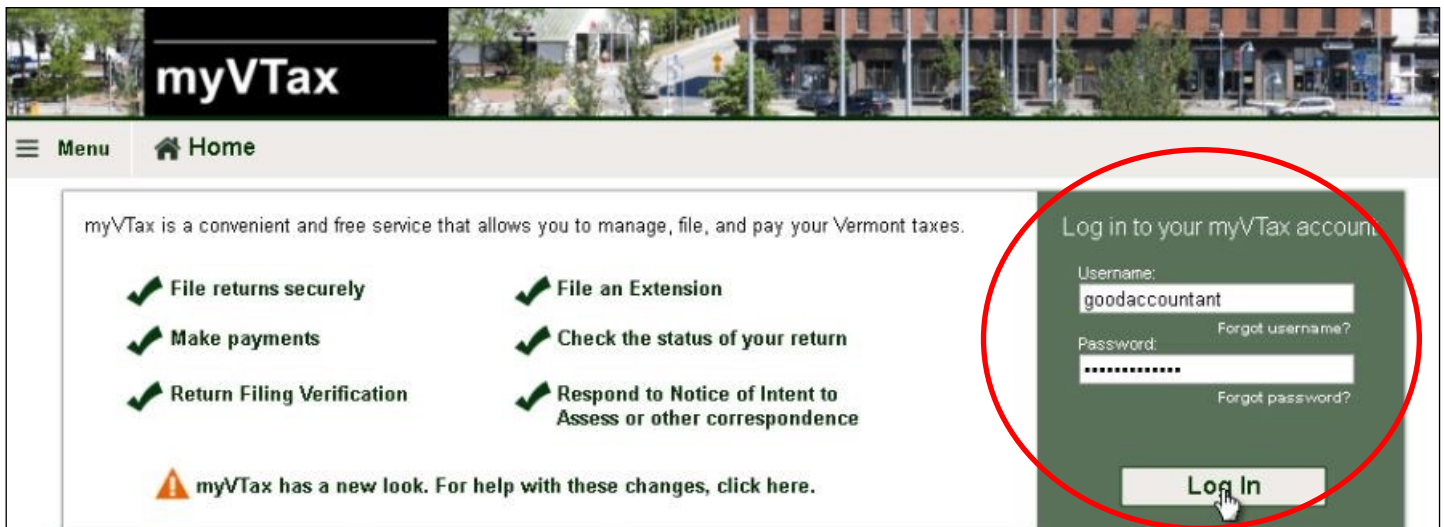
Step 1

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.

Step 2



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 an Extension
- ✓ Check the status of your return
- ✓ Respond to Notice of Intent to Assess or other correspondence

⚠ myVTax has a new look. For help with these changes, click here.

Log in to your myVTax account

Username:

Password:

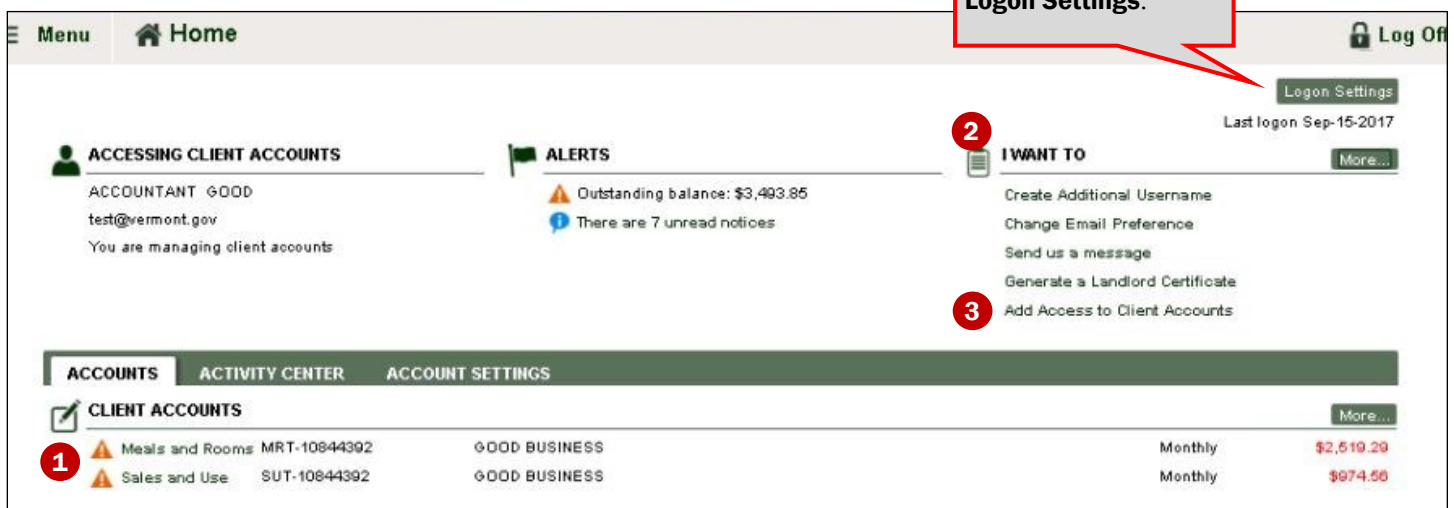
[Forgot username?](#)

[Forgot password?](#)

Log In

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

Step 3



Menu Home

ACCESSING CLIENT ACCOUNTS

ACCOUNTANT GOOD
test@vermont.gov
You are managing client accounts

ALERTS

⚠ Outstanding balance: \$3,493.85
ℹ There are 7 unread notices

2 I WANT TO

Logon Settings
Last login Sep-15-2017

Create Additional Username
Change Email Preference
Send us a message
Generate a Landlord Certificate
3 Add Access to Client Accounts

ACCOUNTS **ACTIVITY CENTER** **ACCOUNT SETTINGS**

CLIENT ACCOUNTS

ACCOUNTS	ACTIVITY CENTER	ACCOUNT SETTINGS
1 ⚠ Meals and Rooms MRT-10844392	GOOD BUSINESS	Monthly \$2,519.29
⚠ Sales and Use SUT-10844392	GOOD BUSINESS	Monthly \$974.56

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

VERIFY THIRD PARTY INFORMATION

This submission allows you to print a form for your client to sign for you to be linked to their tax accounts even if your client does not have a myVTax account. **The form must be printed, signed by your client, and mailed to the Department for processing.** If your client already has a myVTax account, or wishes to create a myVTax account, we recommend having your client initiate the third party link through their own myVTax account. You can send your client instructions from **this link**.

This screen is to confirm the information related to you and your firm that will appear on the Access Form for your client to sign. If information appears incorrect here, you must access your myVTax profile or customer information screens to change it. You can access your myVTax profile by clicking the "Logon Settings" link at the top right of your myVTax personal "Home" screen. For security reasons, information cannot be changed directly from this screen.

Third Party Name	ACCOUNTANT GOOD
Third Party Username	GOODACCOUNTANT
ID Type	Preparer Tax ID
Preparer ID	P****3333
Third Party Email	test@vermont.gov
Third Party Phone	(999) 123-4567

Clicking **Next** saves your entries and moves you to the next step.

Previous Next Cancel

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

TAXPAYER INFORMATION

Taxpayer Entity Type: Individual ☒ Business ☐

Taxpayer First Name	First Name <input type="text"/> M.I. <input type="text"/>	Spouse First Name	First Name <input type="text"/> M.I. <input type="text"/>
Taxpayer Last Name	Last Name <input type="text"/> Required	Spouse Last Name	Last Name <input type="text"/>
Taxpayer SSN	Required <input type="text"/>	Spouse SSN	<input type="text"/>
Taxpayer Email	Email <input type="text"/>	Spouse Email	Email <input type="text"/>
Taxpayer Phone	Phone <input type="text"/>	Spouse Phone	Phone <input type="text"/>

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 is important to enter a phone number or email if the Department has questions for the client about your request.

1. Third Party Information 2. Taxpayer Information 3. Scope of Authorization

TAXPAYER INFORMATION

Taxpayer Entity Type Individual ☐ Business ☒

Taxpayer Name GOOD BUSINESS

Taxpayer FEIN **-***6789

Taxpayer Email taxpayer@vermont.gov

Taxpayer Phone (802) 888-8888 Format: (999) 999-9999

Previous Next

Step 7

Scope of Authorization

1. Third Party Information 2. Taxpayer Information 3. Scope of Authorization

SCOPE OF AUTHORIZATION

Account Types to Grant Access

<input type="checkbox"/> Personal Income Tax	<input type="checkbox"/> Meals and Rooms Tax	<input checked="" type="checkbox"/> Other <i>Account Type</i>
<input type="checkbox"/> Homestead Declaration	<input type="checkbox"/> Sales and Use Tax	<input type="checkbox"/> Other <i>Account Type</i>
<input type="checkbox"/> Renter Rebate Claim	<input checked="" type="checkbox"/> Withholding Tax	<input type="checkbox"/> Other <i>Account Type</i>
<input type="checkbox"/> Corporate Income Tax	<input type="checkbox"/> Property Transfer Tax	<input type="checkbox"/> Other <i>Account Type</i>
<input type="checkbox"/> Business Income Tax	<input type="checkbox"/> Land Gains Tax	<input type="checkbox"/> Other <i>Account Type</i>

Do you wish to allow your accountant or other third party to access your account(s) with logins other than the one listed in Section: Third Party Information?

☒ **Yes**, allow third party to grant other logins access to my account(s).

☐ **No**, allow only this login to access my account(s).

Begin Tax Year

Month: January Year: 2015

End Tax Year

Month: December Year: 2020

Which levels of access do you wish to grant?

Access Level: File Returns and Make Payments

Previous Submit Cancel

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

Menu Home » 3rd Party Access Form » Confirmation Log Off

CONFIRMATION

This submission allows you to print a form for your client to sign for you to be linked to their tax accounts even if your client does not have a myVTax account. The form must be printed, signed by your client, and mailed to the Department for processing. If your client already has a myVTax account, or wishes to create a myVTax account, we recommend having your client initiate the third party link through their own myVTax account. You can send your client instructions from [this link](#).

OK

1 Printable View

2

Signature of Taxpayer in Section A	Title, if signing on behalf of an entity	Date
Signature of Spouse/CU Partner in Section A		Date
Signature of Authorized Third Party in Section B		Date

3 Send completed request to:

Vermont Department of Taxes
133 State Street
Montpelier, VT 05633-1401

Do not fax or email.

We must have your client's original signature on this form in order to process your third-party access request

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.