



TNTAP: THIRD PARTY ACCESS

January 2023 TNTAP Webinar

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- Link to Technical Service Resource Guide <https://www.cisco.com/c/en/us/support/web/tac/technical-services-resource-guide.html>
- Try leaving and then re-entering the event

View a recording of today's presentation!

[tn.gov/revenue](https://www.tn.gov/revenue) > Taxpayer Education > Tax Webinars

<https://www.tn.gov/revenue/taxpayer-education/tax-webinars.html>

The webinar recording will be posted in the "Webinar Video Library" the day after the event.

➤ **Please submit specific account-related questions or any questions that do not get addressed in this webinar to us directly!**

- www.tn.gov/Revenue
- Revenue.support@tn.gov
- 615.253.0600 (M-F 8-4:30 CST)



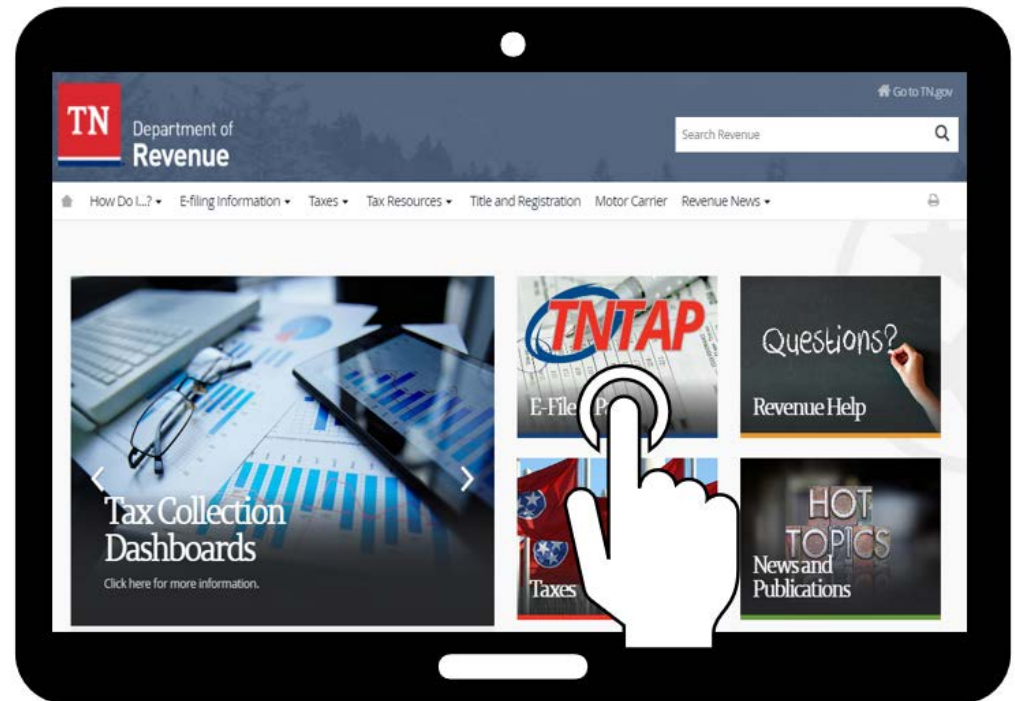
Overview of Presentation

- **TYPES OF TNTAP ACCESS TYPES/LEVELS**
- **MANAGING ACCESS**
- **NAVIGATING CLIENT ACCOUNTS**
- **RESOURCES & FAQ**

TNTAP - Tennessee Taxpayer Access Point

Access to TN tax accounts to perform a variety of tasks including:

- ✓ REGISTERING
- ✓ ELECTRONIC FILING/PAYMENT
- ✓ SCHEDULING PAYMENTS IN ADVANCE AND MANAGING PAYMENT CHANNELS
- ✓ AUTOMATIC CORRECTION OF COMMON ERRORS
- ✓ AMENDING RETURNS
- ✓ ACCESSING [PREVIOUS RETURNS, CERTIFICATES, AND LETTERS
- ✓ MANAGING ACCOUNTS, ACCESS, AND ADDRESSES
- ✓ MUCH MORE!



[https://tntap.tn.gov/eservices/ /](https://tntap.tn.gov/eservices/)

TNTAP Access Types

- **Master** - No restrictions ****ONLY FOR THE ACCOUNT OWNER****
 - Access to any and all TNTAP features, including managing access that others have to their accounts
 - Only one master logon per entity
- **Administrator** - Same permissions as master but only for accounts assigned to them
- **Account Manager** - Same permissions as administrator but cannot manage logon
- **View Only** - No account changes allowed
- **3rd Party** - Only what the taxpayer allows

Access Levels

Access levels dictate what actions you can perform for each individual client account. TNTAP access levels are:

- File returns
- File returns and make payments
- Make payments
- View only



By default, the third-party representative will be granted the ability to file returns and make payments.

3rd Party Logons Can....



Function	Location in TNTAP
Search for Payments	More/Additional Logons, or After selecting a client: More/Additional Service-- (pymts specific to that client)
Customer Refund	After selecting a client: More/Additional Services
Claim for Refund	After selecting a client: Summary/Additional Actions/Licenses next to the appropriate account
Penalty Waiver	After selecting a client: Summary/Additional Actions/Licenses next to the appropriate account
Change Primary and/or Mailing Address	After selecting a client: More/Names & Addresses > Manage Names & Addresses
Add SOS number	After selecting a client: More/Additional Services
Apply for or renew an F&E exemption	After selecting a client: More/Additional Services
Obtain a clearance	After selecting a client: More/Additional Services
Close accounts and locations	After selecting a client: Summary/Additional Actions/Licenses next to the appropriate account
Change Legal Name	After selecting a client: More/Names & Addresses > Manage Names & Addresses > Names



...and More!

3rd Party Logons Cannot....



- Apply for a payment plan
- Request a change of filing frequency
- Change a location address
- Change a DBA Name
- Submit a POA through TNTAP
- Account number search while logged in
- Complete a Principal Surety Bond Form
- Complete a Bond Rider Form

Gaining 3rd Party Access

1. Create your own TNTAP access using credentials for you as an individual/company

- Ensure that you do not attempt to add access to a customer's account by signing into TNTAP as the customer.
- If your company has TN tax accounts and/or there is already a TNTAP logon for the company, you should speak with the person who has the master logon about creating a secondary logon for you under the master logon for the company.

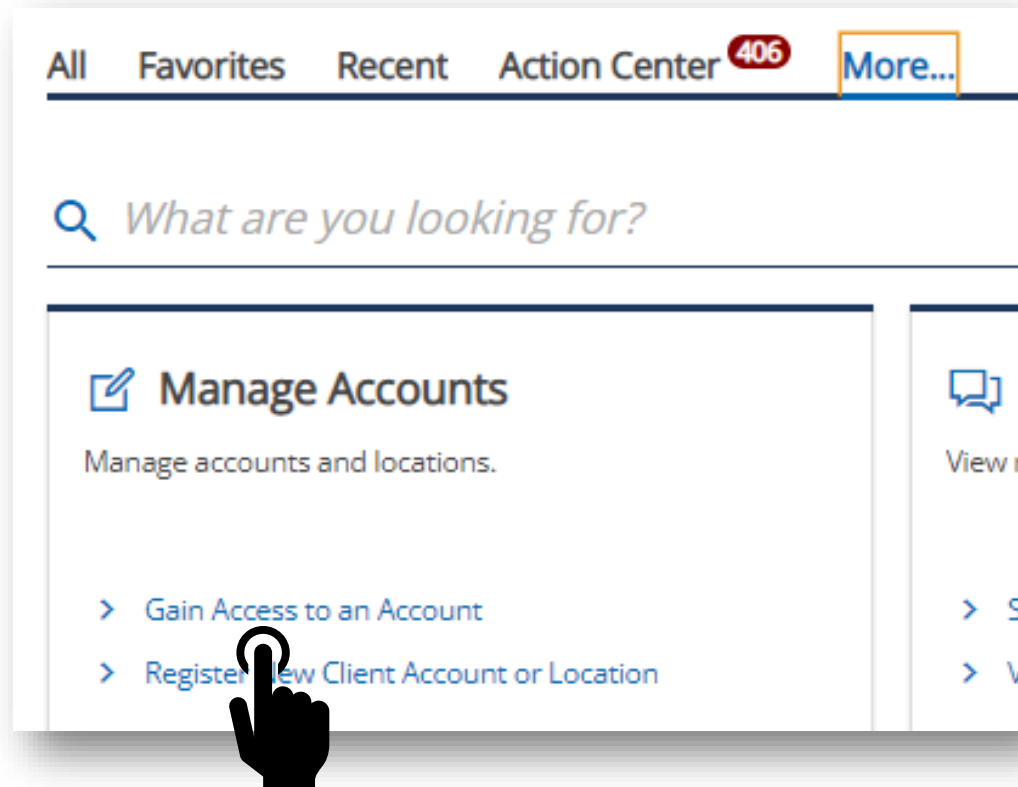
2. Gain access to a client's account

[RevenueHelp Article: Creating a TNTAP Logon](#)



How to Gain 3rd Party Access

TNTAP Home > More > Manage Accounts



[RevenueHelp Article: Gaining Access as a Third Party](#)

How to Gain 3rd Party Access – Info Needed

Who does this tax account belong to?

Me

Someone Else

Enter the ID Type and Entity ID

ID Type *
Required

Enter ID *
Required

Confirm ID *
Required

I certify that I am an authorized representative of this taxpayer. *

Tax Account Information

Account Type *
Required

Account ID *
Required

Account Country
UNITED STATES OF AMERICA

Account ZIP Code *
Required

How would you like to verify your account?

Enter one of the last 3 payment amounts

Enter letter ID

Send instructions

Letter ID *
Required

After submitting the request for 3rd Party access, the account owner will receive a letter that you have requested access.

Gathering Account Info for Access



🔍 Tax Account Number Search

Look up franchise and excise, business, sales and use, Hall income tax, or Security Number (SSN) or SOS Control Number.

Account Type *

Required

Taxpayer ID Type *

Required

I certify that I am an authorized representative of this taxpayer. *

Yes

No



Information and Inquiries

Look up information, request a refund, or submit a report.

> [View Options](#)

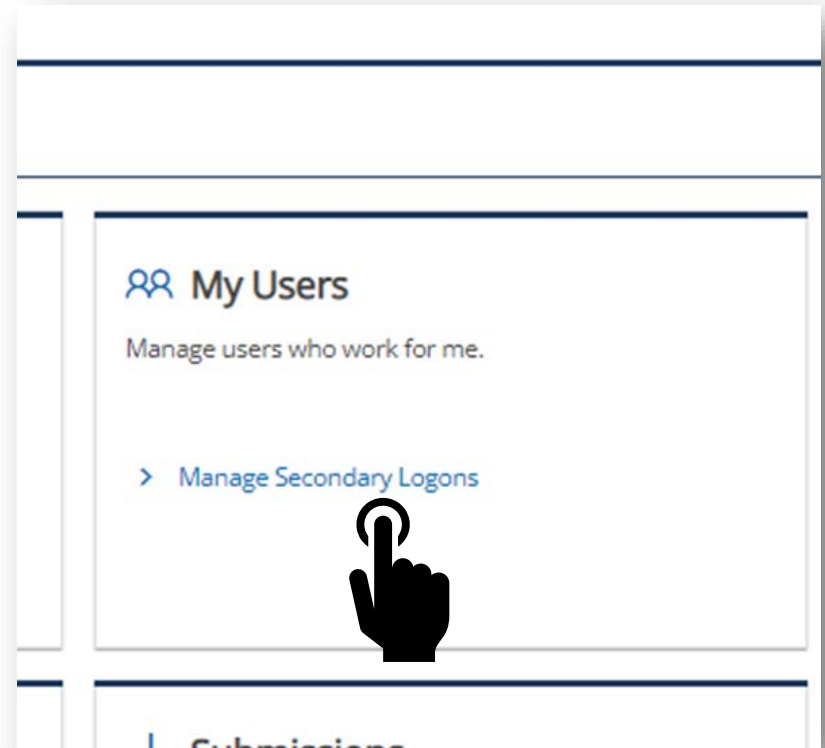
TO RECEIVE A LETTER ID:

- 1) Your client can provide this if they have saved any correspondence from TDOR, or
- 2) Contact Revenue Support, certify that you are an authorized representative, and provide account information

Secondary Logons

Manage My Profile > More > My Users > Manage Secondary Logons

- Perform work on your behalf
- Only have access to your customers/accounts
 - lose access when you lose access and will have logon canceled if your logon is canceled
- You will gain access to any account the secondary logon gains access to



Security Groups

You can create Security Groups in order to categorize your clients and easily manage which groups your secondary logons have access to (i.e. group your clients in certain industries together, like restaurants, convenience stores, etc, or clients in certain regions, such as east TN clients, etc.)

Manage My Profile > More > My Users > Manage Secondary Logons > Add

Secondary Logons Customer Security **Security Groups**

Security Groups Add

Name	Description
Default	The default security group which all customers are initially placed in and everyone initially has access to.



Managing Customers in TNTAP

Logon Welcome, **Name**
Name
name@email.com You last logged in on Monday, Oct 24, 2022 3:40:45 PM
[Manage My Profile](#) **1**

[All](#) [Favorites](#) [Recent](#) [Action Center](#) **406** [More...](#)

Who do you want to work with?

< Page 1 of 13 >

CUSTOMER 1 1	☆ Add to Favorites
..*1234 CUSTOMER ADDRESS	
CUSTOMER 2 1	☆ Add to Favorites
..*1235 CUSTOMER ADDRESS	
CUSTOMER 3 3	☆ Add to Favorites
...	

Action Center Items

The screenshot shows a software interface with a navigation bar at the top containing 'All', 'Favorites', 'Recent', 'Action Center' (with a red badge '406'), and 'More...'. A hand cursor is pointing at the 'Action Center' tab. Below the navigation bar, there are two dropdown menus: 'All Account Types' and 'All Actions'. The 'All Account Types' dropdown is open, showing options: 'All Account Types', 'Business Tax', 'Franchise and Excise Tax', 'Liquor by the Drink Tax', and 'Sales and Use Tax'. The 'All Actions' dropdown is also open, showing options: 'All Actions', 'Balances to Pay', 'Letters to Read', 'Mailing Address Update', 'Messages to Read', 'Returns to File', and 'Unverified Primary Address'. Below the dropdowns, there is a pagination bar with '< Page 1 of 41 >' and a 'Filter' button. The main content area displays a card for 'Franchise and Excise Tax' with the ID '**.***5258' and a notification for 'F&E 170 Tax Return for 31-Dec-2022 need'.

Resources

TN.gov/revenue > RevenueHelp > TNTAP



Search

Tennessee Taxpayer Access Point (TNTAP) Out-of-State Facility

- General TNTAP How-to Videos
- About TNTAP
- TNTAP Login
- TNTAP Registration
- TNTAP Payments
- TNTAP Tax Returns
- How-to Videos: Licensed Distributor Reports

Taxes Vehicle

Collection Services Motor

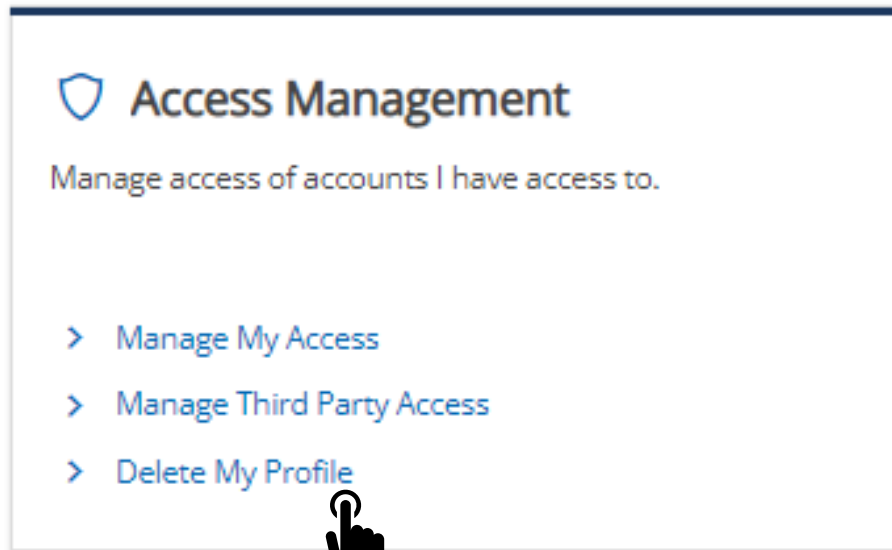
**90+ HELP
ARTICLES ABOUT
TNTAP!**



FAQ

I accidentally created a logon as the taxpayer (master access) instead of 3rd party, how do I fix this?

Manage My Profile > More > Access Management



- 1) Delete the wrong profile
- 2) Login (or create login) as yourself
- 3) Follow guidance for gaining access as 3rd party

FAQ

How do I delete a client I no longer need access to?

Manage My Profile > More > Access Management

The screenshot shows the 'Access Settings' section for 'CUSTOMER 1 **.*1234'. It contains a table with two rows of access settings. The first row is 'General Access' with a '3rd Party' access type. The second row is 'Franchise and Excise Tax' with ID '123456789-FAE' and a 'File Return and Make Payments' access type. A hand cursor icon is positioned over the '3rd Party' text in the first row. To the right of the table is a '> Cancel My Access' link with a hand cursor icon over it.

Access Settings	
CUSTOMER 1 **.*1234	
General Access	3rd Party
Franchise and Excise Tax	123456789-FAE File Return and Make Payments

> Cancel My Access

Settings

Security

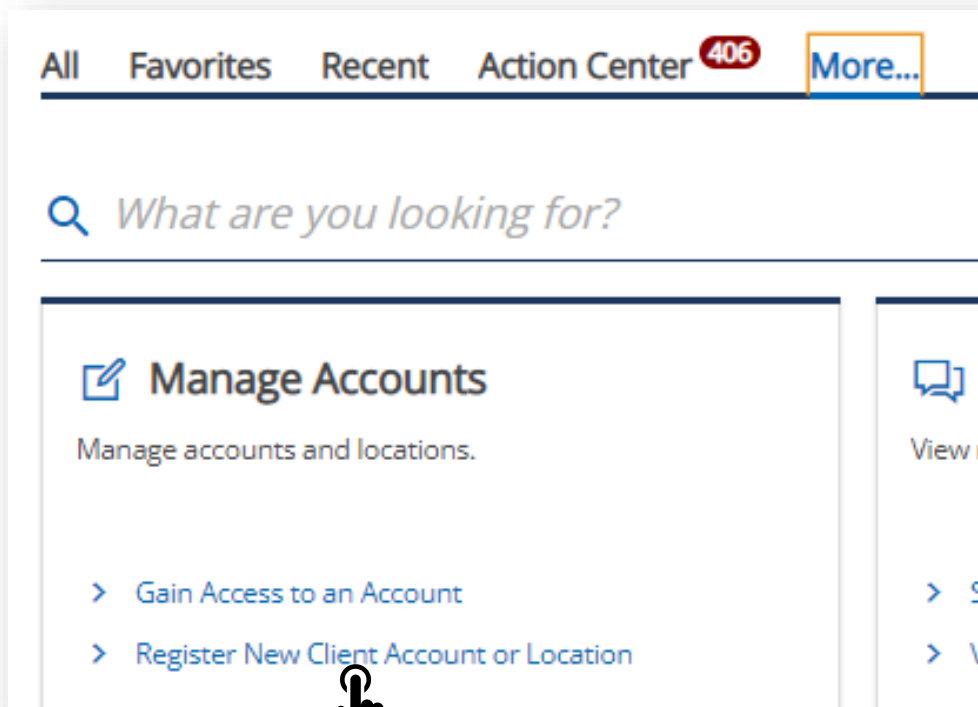
Access Type : 3rd Party

The client can also delete/manage 3rd party access!

FAQ

How do I register a new account/location for a client?

TNTAP Home > More > Manage Accounts



NOTE: A 3rd party cannot change the address of a currently registered location.

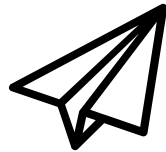
- The account owner can perform this function on TNTAP **if** the new location is within the same situs
- If the new location is in a different situs, the account owner OR 3rd Party can:
 - close the current location and register for a new one (the 3rd party can do this)

CONTACT US!

Please submit
specific
account-
related
questions, or
any questions
that do not get
addressed in
this webinar to
directly us!



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