



Updating TN Tax Accounts

Tax Webinar: November 2023

Information is current as of the date presented and may not reflect legislative and other subsequent changes. For the most up-to-date information, please refer to our [published tax manuals](#) and [Revenue Help articles](#). Additionally, you can find legislative summaries by year/tax type [here](#).

Thanks for joining us!

We will begin at 9:00 am (CST)

➤ **Please check your audio settings. See below for resources in case you experience audio or other technical difficulties:**

- Contact WebEx Support <https://help.webex.com/contact/>
- 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 > 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)

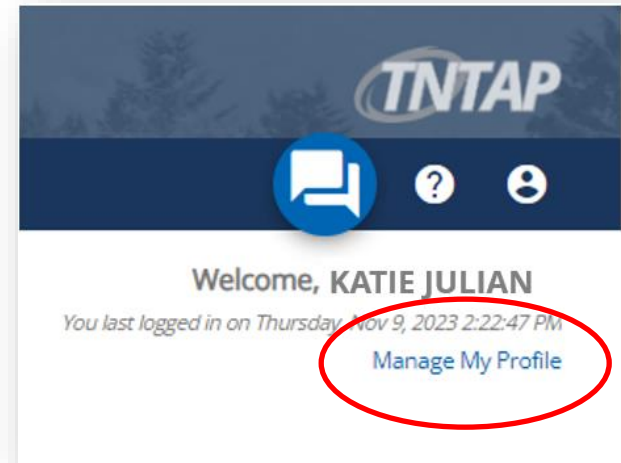


Overview

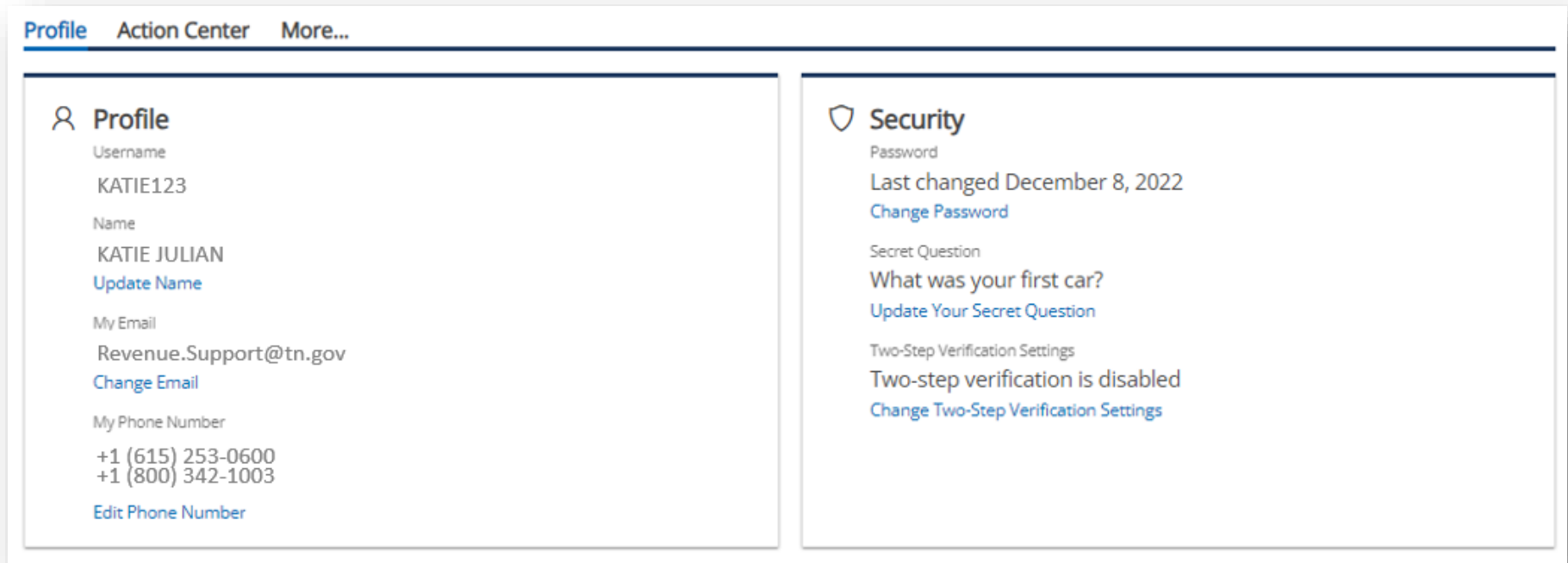
- **What you can update in TNTAP**
- **What you cannot update in TNTAP**
- **Resources**
- **FAQ's/Chat**



Manage My Profile



- **Manage your TNTAP profile**
- **Link is located at the top right of the screen once logged into TNTAP**



IF YOU ARE LOCKED OUT DUE TO MULTIPLE FAILED LOGIN ATTEMPTS, CONTACT US AT (615) 253-0600.



Manage My Profile > More

The screenshot displays a user profile management interface with a navigation bar at the top containing 'Profile', 'Action Center', and 'More...'. A yellow 'Staging' label is positioned above the 'More...' link. Below the navigation bar is a search bar with the placeholder text 'What are you looking for?'. The main content area is organized into a grid of seven panels, each with an icon, a title, a brief description, and a list of actions:

- Access Management** (Shield icon): Manage access of accounts I have access to.
 - > Manage My Access
 - > Manage Third Party Access
 - > Delete My Profile
- My Users** (User icon): Manage users who work for me.
 - > Manage Secondary Logons
- Other Users** (User icon): Manage users who are associated to me.
 - > Manage Additional Logons
- Payment Channels** (Bank icon): Manage my bank accounts used to make payments on e-Services.
 - > Manage Payment Channels
- Submissions** (Download icon): Search for previous submissions.
 - > Search Submissions
- Revenue Help** (Message icon): View messages I've received from the agency.
 - > Send Us a Message
 - > View Messages
- Activity** (Checkmark icon): View my activity on e-Services.
 - > View Activity

Access Levels & Logons

TNTAP access levels dictate what actions you can perform for each account:

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

Master – No restrictions. The first person to logon to TNTAP with the entity credentials will automatically become the master.

- Has access to all TNTAP features, including access to all tax accounts, payments, filings & allow or deny access to others, amending, logon changes, etc.
- Can setup secondary logons for someone to act on their behalf
- Can allow others to create additional logons for the business and manage the level of access for each

Administrator – Same permissions as master but only for accounts assigned to them

Account Manager – Same permissions as administrator but cannot manage logons

View Only – No account changes allowed

Third-Party – By default, the third-party representative will be granted the ability to file returns and make payments. Taxpayers (master logon) can change or end the third-party access.



Access Management

- Steps to change/cancel 3rd party access

Access Management

Manage access of accounts I have access to.

- > Manage My Access
- > Manage Third Party Access
- > Delete My Profile

Do you want to allow third parties to create logons for your tax accounts?

These settings determine if accountants or third parties can request access to your accounts and what level of access they are initially given. If not allowed, they will be prevented from requesting access to your accounts.

Allowed : Yes

Default Access : 3rd Party

Default Account Access : File Returns and Make Payments

Logons

Username

KATIE123

Access	Act	Filter


> [Manage Account Access](#)

Access	Act	Filter
Acc...		Manage Filter
FOUNT		
Gener	Cancel Access	3rd Party
Busine	Cancel Access	File Returns and Make Payments All Periods
Sales	Cancel Access	File Returns and Make Payments All Periods



My Users

- **Add/Delete Secondary Logons**

 **My Users**

Manage users who work for me.

[> Manage Secondary Logons](#)

[< Manage My Profile](#)

Secondary Logons

You can create and manage logons that only have access to customers and accounts that you have access to. These logons will act on your behalf to perform tasks such as filing returns and making payments for your business or clients.

[Secondary Logons](#) [Customers](#) [Customer Groups](#)

Logons

Username

[Create New Logon](#)

Access Type

[< Secondary Logons](#)

[Add Access](#) [Access Settings](#)


Create a Logon for Someone Else

Username *
Required

Name *
Required

Email *
Required

Confirm Email *
Required

Type of Access 

Administrator

- Account Manager
- Administrator**
- View Only

and associated accounts.

[Previous](#) [Next](#)

Secondary Logons

- Perform work on your behalf.
- May only have access to customers and accounts that you have access to.
- Will lose access to customers and accounts that you lose access to.
- Will have their logons cancelled when your logon is cancelled.
- Can have their access managed for all customers and accounts.



Payment Channels

- RevenueHelp Article: [Saving Bank Account Information in TNTAP](#)
- RevenueHelp Article: [Removing Saved Bank Account Information](#)

Payment Channels

KATIES TEST STORE ***-**-1234

[+ Setup new payment channel](#)

SUNTRUST - +7374

Sales and Use Tax

123456789-SLC

No default payment channel

Business Tax

123456789-BUS

NOT KEEPING BANK INFORMATION UPDATED MAY LEAD TO COSTLY PENALTY/INTEREST FEES!

INSUFFICIENT FUNDS PENALTIES CANNOT BE WAIVED!



TNTAP Payments Help Articles


- [Canceling or Deleting a Payment in TNTAP](#)
 - Credit Card payments cannot be cancelled/deleted after they have been submitted
 - ACH Debit payments can be cancelled/deleted, but only if before the payment is “processing”
- [Printing a Payment Receipt in TNTAP](#)
- [Checking the Status of a Payment](#)
- [TNTAP Payment Confirmation](#)


NOTE: If you made a payment that was not applied to the filing period and/or the tax account you intended, contact us at (615) 253-0600.

Submissions

Processed Deleted

Search

Processed From 

Processed To 

Submissions

Date	Title	Name	Account	Account ID	Filing Period	Confirmation Number
23-Oct-2023	Payment Confirmation					2-256
18-Oct-2023	Sales and Use Tax Return					7-760
22-Sep-2023	Payment Confirmation					1-568

- **Submissions are things you have submitted online for processing (i.e. filing returns, payments, changing contact information, etc.)**
- **Submissions older than 12 month can be found using the search.**

TNTAP Home > Summary

TNTAP

JIM JONES CORP
-*0351
500 DEADERICK ST
NASHVILLE TN 37242-0001

Welcome, First Last
You last logged in on Saturday, Jun 19, 2021 10:30:42 AM
[Manage My Profile](#)

Favorites Summary Action Center Settings More...

Filter

Business Tax
JIM JONES CORP
10624 GENLOU RD
CHESTERFIELD VA 23832-7272

Account
Balance
\$0.00

- Make a Payment
- View/File Returns
- Additional Actions/Licenses

Franchise and Excise Tax
JIM JONES CORP
10624 GENLOU RD
CHESTERFIELD VA 23832-7272

Account
Balance
\$0.00

- Make a Payment
- View/File Returns
- Additional Actions

Your Account > Additional Actions

Sales Tax

Additional Actions

[Filter](#)

Exemption Renewal

- > [Renew Agricultural Exemption](#) Renew agricultural sales an

Forms

- > [Petition for Penalty Waiver](#) File a petition for a penalty
- > [Claim a Refund](#) Claim a refund.

Closures

- > [Close Account](#) Close an account.

Business Tax

Additional Actions [View Licenses](#) [View Certificates](#)

[Filter](#)

Forms

- > [Petition for Penalty Waiver](#) File a petition for a penalty waiver.
- > [Claim a Refund](#) Claim a refund.

Closures

- > [Close Account](#) Close an account.

Your Account > Additional Actions

Franchise/Excise Tax

Tax Credits Additional Actions

Carryover Credits

[Show History](#)

Credit Type	Credit Begin	Credit Expiration	Amount Approved	Amount Claimed	Amount Remaining
Net Operating Loss Carryover	01 Dec 2020	31 Dec 2025	8,626.00	0.00	8,626.00

Tax Credits **Additional Actions**

File

- > [Franchise and Excise Federal Income Revision](#) Submit a franchise and excise federal income revision.

Forms

- > [Petition for Penalty Waiver](#) File a petition for a penalty waiver.
- > [Submit a Job Tax Credit Business Plan](#) Submit a job tax credit business plan.
- > [Claim a Refund](#) Claim a refund.



Closing an Account

If a location/account is closing, ensure that the proper date is selected.

- If closure date is within period for which a return has been filed/paid, no further action is needed in order to close the location
- If closure date is within period for which a return has NOT been filed/paid, you must file/pay in order to complete location closure.

The screenshot shows a web form titled "Close Account" with a progress bar indicating the "Close Request" step. The form contains the following fields and options:

- Do you want to close all locations?**: Radio buttons for "Yes" and "No".
- Date Closed**: A text field containing "31-Dec-2022" with a calendar icon to its right.
- Closure Reason**: A text field containing "out of business".

Below the form, there is a "Cancel" button on the left and "Previous" and "Next" buttons on the right. The "Next" button is highlighted in dark blue. A message at the bottom of the form reads: "On the next screen you will select the location(s) you wish to close. Please click next."

TNTAP Home > More

TNTAP

Work with Someone Else

JIM JONES CORP
-**0351
500 DEADERICK ST
NASHVILLE TN 37242-0001

Welcome, First Last
You last logged in on Saturday, Jun 19, 2021 10:30:42 AM
[Manage My Profile](#)

[Favorites](#) [Summary](#) [Action Center](#) [Settings](#) [More..](#)

What are you looking for?

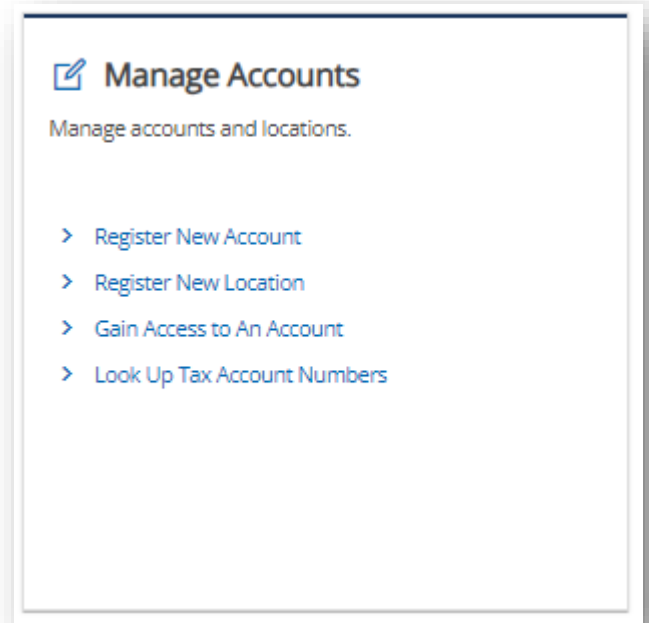
- Manage Accounts**
Manage accounts and locations.
 - > Register New Account
 - > Register New Location
 - > Gain Access to An Account
 - > Look Up Tax Account Numbers
- Payments**
Manage payments for this customer.
 - > Request a Payment Plan
 - > Cancel a Payment Plan
- Additional Services**
Additional Services
 - > **Print Certificate**
 - > Request a Customer Refund
 - > Submit Power of Attorney
 - > Principal Surety Bond Form
 - > Bond Rider Form
 - > Obtain a Franchise/Excise Tax Clearance
 - > Apply or Renew F&E Tax Exemption
- Access**
Manage users who have access to this customer.
 - > View Access
 - > Manage Access
- Names & Addresses**
View or update names and addresses associated to this customer.
 - > Manage Names & Addresses
- Letters**
View letters I've received from the agency.
 - > **View Letters**
- Submissions**
- Revenue Help**

TNTAP Home > More > Manage Accounts

- **If you register a new location for Business Tax, you must also obtain a business license from the local jurisdiction(s).**

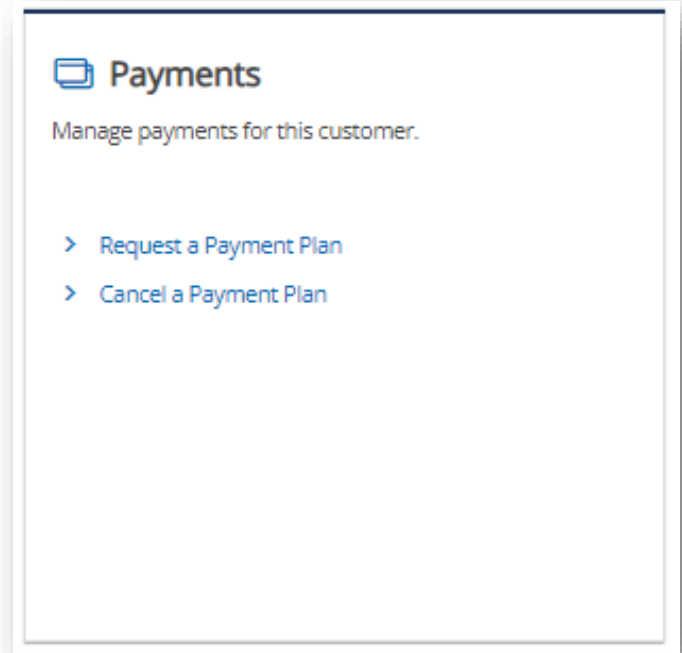
NOTE: New threshold is \$100,000 for business tax requirement/standard business license.

- Webinar: [Business Tax Law Changes](#)



TNTAP Home > More > Payments

- **From this page, a “Master” logon can request a payment plan.**
 - 3rd Party logon does not have this ability.
 - All returns/payments must be processed in order to request a payment plan.
- **To manage payment channels/banking information, use the “Manage my Profile” link**



RevenueHelp Articles: [Payment Plans](#)

TNTAP Home > More > Additional Services


Additional Services

Additional Services

- > [Request a Customer Refund](#)
- > [Print Certificate](#)
- > [Submit Power of Attorney](#)
- > [Principal Surety Bond Form](#)
- > [Bond Rider Form](#)
- > [Obtain a Franchise/Excise Tax Clearance](#)
- > [Apply or Renew F&E Tax Exemption](#)
- > [Search for Payments](#)

TNTAP Home > More > Names

Names	Addresses	Locations
Defaults	Legal	KATIE JULIAN
	DBA	KATIES STORE

 **Names & Addresses**

View or update names and addresses associated to this customer.

[> Manage Names & Addresses](#)

TNTAP Home > More > Addresses

- **Mailing:** Place where you prefer to receive Dept. of Revenue Letters
- **Primary:** If different from mailing, this is where the business is headquartered (if any); this address is not required
- **Location:** See Next Slide...

When changing address, be sure to click

Verify Address

The screenshot shows a web interface with three tabs: 'Names', 'Addresses', and 'Locations'. The 'Addresses' tab is active. On the left, there is a 'Defaults' section with the text 'Click on address to change' in red. On the right, there are three rows of address information:

Category	Address
Mailing	KATIES STORE 500 DEADERICK ST NASHVILLE, TN 37242
Primary	KATIES STORE HEADQUARTERS 123 DEADERICK ST NASHVILLE, TN 37242
Tax Record	Add

TNTAP Home > More > Addresses > Location

- **This is for location-based taxes (Business Tax, Sales Tax, Liquor by the Drink, etc), only change location address if the new address is NOT IN A NEW JURISDICTION!**
- **If new location address is within a different jurisdiction, close the current location and then “Register New Location”**
 - If you are closing a location, refer to information on location/account closure.

Amending a Return

The screenshot displays the TNTAP (Tennessee Tax and Assessment Portal) interface. At the top left, the account information is shown: 'Account 123456789-SLC' with a 'Balance \$0.00'. To the right of this information is a menu with three options: '> Make a Payment', '> View/File Returns', and '> Additional Actions'. A red arrow points to the 'View/File Returns' option. Below the account information, there is a table of returns. The first row is for '31-Aug-2021' with the status 'Sales and Use Return' and 'Processed-OnTime', and a 'View or Amend Return' link. A second row is for '31-Jul-2021' with a 'View or Amend Return' link. A dark blue banner with the TNTAP logo and navigation icons (chat, help, user) is overlaid on the table. Below the table, there is another menu with four options: '> View Submission', '> View Payment', '> Print', and '> Amend'. A second red arrow points to the 'View or Amend Return' link for the 31-Aug-2021 return.

- **If amendment is made after the due date of the return and the amendment results in additional tax owed, penalty and interest will calculate based on the difference.**
- **If amended return results in a credit, you may request a refund.**

2023 TN Works Tax Act – New Business Tax Threshold

Effective for the 12/31/2023 tax period:

- Under \$3k - Call us to close account
- \$3k-\$100k - Call us to change account status to “filing not required”
- Over \$100k - No change needed



NEW THRESHOLD based on total gross per jurisdiction

615.253.0600 (M-F 8-4:30 CST)



Applying for an Exemption

- **Currently, applications for exemptions are not available on TNTAP**
- **You can renew an Ag Exemption under Account Additional Actions**

- [Application for Broadband Infrastructure Sales and Use Tax Exemption](#)
- [Application for Research and Development Machinery Sales and Use Tax Exemption](#)
- [Application for Sales and Use Tax Exempt Entities or State and Federally Chartered Credit Unions](#)
- [Application for Registration Agricultural Sales and Use Tax Certificate of Exemption - "for use after January 1, 2023"](#)
- [Application for Pollution Control Sales and Use Tax Exemption](#)
- [Application for Exemption from Sales Tax for Interstate Telecommunications in the Operation of a Call Center](#)
- [Application for Industrial Machinery Exemption](#)
- [Application for Sales Tax Exemption for Interstate Commerce Motor Vehicles and Trailers](#)
- [Application for Sales and Use Tax Exemption Qualified Data Center](#)
- [Application for Sales and Use Tax Exemption Warehouse and Distribution Facility Material Handling and Racking Systems](#)
- [Certificate of Exemption for Electric Cooperatives](#)
- [Certificate of Exemption for Electric Generating and Distribution Systems](#)
- [Certificate of Exemption for Telephone Cooperatives](#)
- [Certificate of Exemption Purchasing Contractors](#)
- [Government Certificate of Exemption](#)
- [Remotely Accessed Software Direct Pay Permit](#)
- [Streamlined Sales and Use Tax Certificate of Exemption and Instructions](#)
- [Supplement Application for Certified Green Energy Production Facility](#)

Calculating Penalty and Interest

- **If you submit a return after the due date, the summary page will not yet include P&I.**
 - Wait until the return has posted and then log back in to see the total amount due that includes P&I, *or*
 - Calculate your own P&I, then enter it on the summary page, *or*
 - Contact us at (615) 253-0600 for P&I calculation assistance.

Interest

$12.25\% - [(\$tax \times .1225)/365] \times \# \text{ days late}$

Penalties

****minimum penalty is \$15****

DAYS LATE	PERCENTAGE
1-30	5%
31-60	10%
61-90	15%
91-120	20%
121+	25%

Web page - [Interest Rates](#)



Transferring Credits

- If you have a credit on one account and a liability/balance on another account, contact us at (615) 253-0600 or email Revenue.Support@tn.gov to request transfer of credit.

- Credit on a period within an account will automatically be applied to liability on subsequent period(s).

The screenshot displays a web interface for a tax account. At the top, there are navigation tabs: 'Summary', 'Action Center' (with a red notification icon), 'Settings', and 'More...'. Below the navigation is a 'Filter' input field. The main content is divided into two sections: 'Business Tax' and 'Sales and Use Tax'. Each section contains an 'Account' card with a balance and a 'Business Tax Return' or 'Sales and Use Return' card. The 'Business Tax' section shows a balance of \$560.00 and a return for 31-Dec-2022 with a status of 'Processed-Late'. The 'Sales and Use Tax' section shows a balance of \$200.00 and a return for 31-Oct-2023 with a 'File now' button. Action Center items are also visible in the 'Sales and Use Tax' section.

Section	Account Balance	Return Information	Actions
Business Tax	\$560.00	Business Tax Return for 31-Dec-2022 Status: Processed-Late	Make a Payment, View File Returns, Additional Actions/Licenses
Sales and Use Tax	\$200.00	Sales and Use Return for 31-Oct-2023	Make a Payment, View File Returns, Additional Actions, File now

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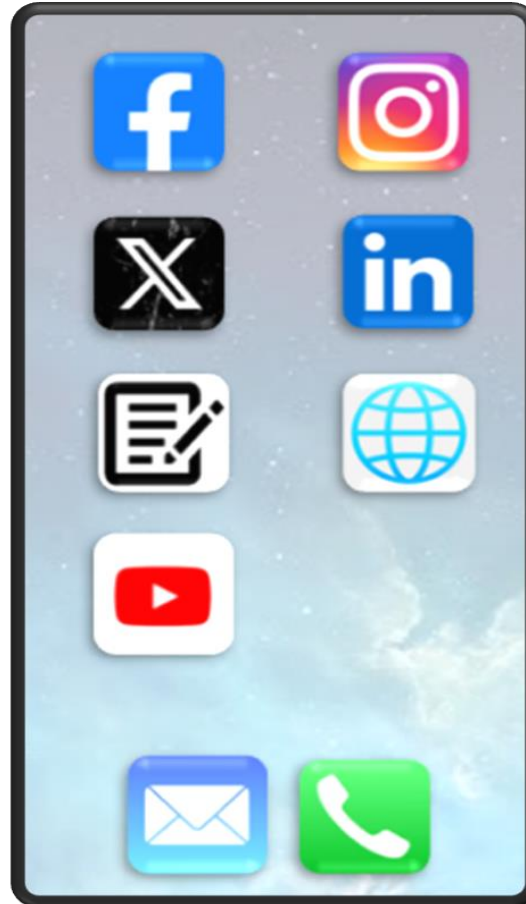
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On the Web:
www.tn.gov/revenue

Call the Tax Help Line:

615.253.0600

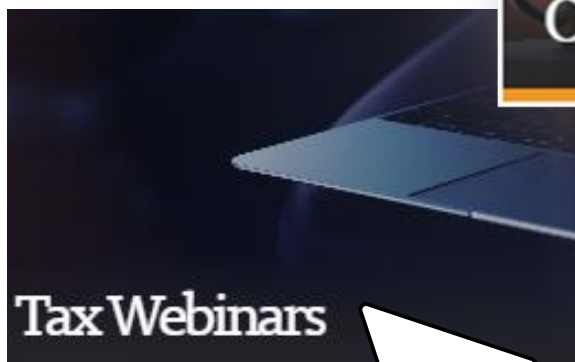
SUPPORT STAFF AVAILABLE TO ASSIST YOU M-F 8am - 4:30pm

[All Dept. of Revenue Contact Numbers and Office Locations](#)



UPCOMING!

- **Next Webinar: 12/19 – Taxation of Computer Software**
- **New Business Workshop: 1/10/24**



Taxpayer Education & Outreach



**PLEASE TAKE A MOMENT
TO COMPLETE A BRIEF
SURVEY UPON EXITING!**

IMPORTANT: In order to receive CPE credit for attending, you must answer yes to question 4 of the post-event survey.