

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. 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, sign it, have your client sign it, then submit the form to the Vermont Department of Taxes for processing.
4. The Department will verify the information, process the request, and connect you with your client.

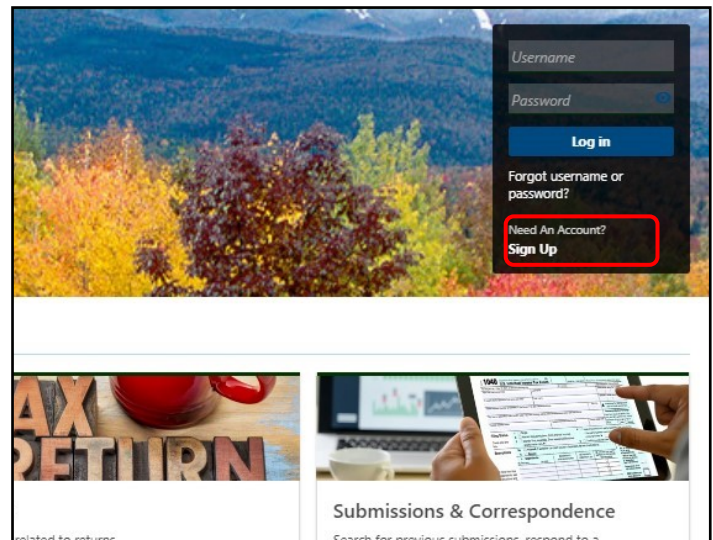
This guide provides step-by-step instructions on how to complete the form and submit it to us.

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 **Need An Account? Sign Up**.



On the next screen, select **Accountants, Other Tax Professionals, Attorneys, and Landlords** and follow the instructions to set up an account. For help, see myVTax Guide: How to Register an Attorney, Tax Professional, or Landlord Account.

<p>For Businesses and Corporations</p> <p>Click here if you are a business taxpayer who would like to register your tax accounts or add myVTax access for accounts that are already registered with the Depart</p>
<p>For Individuals</p> <p>Click here if you are attempting to request access to your existing Homestead Declaration, Renter Rebate, or Personal Income Tax account</p>
<p>Accountants, Other Tax Professionals, Attorneys, and Landlords</p> <p>Click here if you are an accountant, other third party tax professional, attorney, or landlord</p>
<p>myVTax Access code</p> <p>Click here if you have already received a myVTax Access Code and want to activate your account(s).</p>

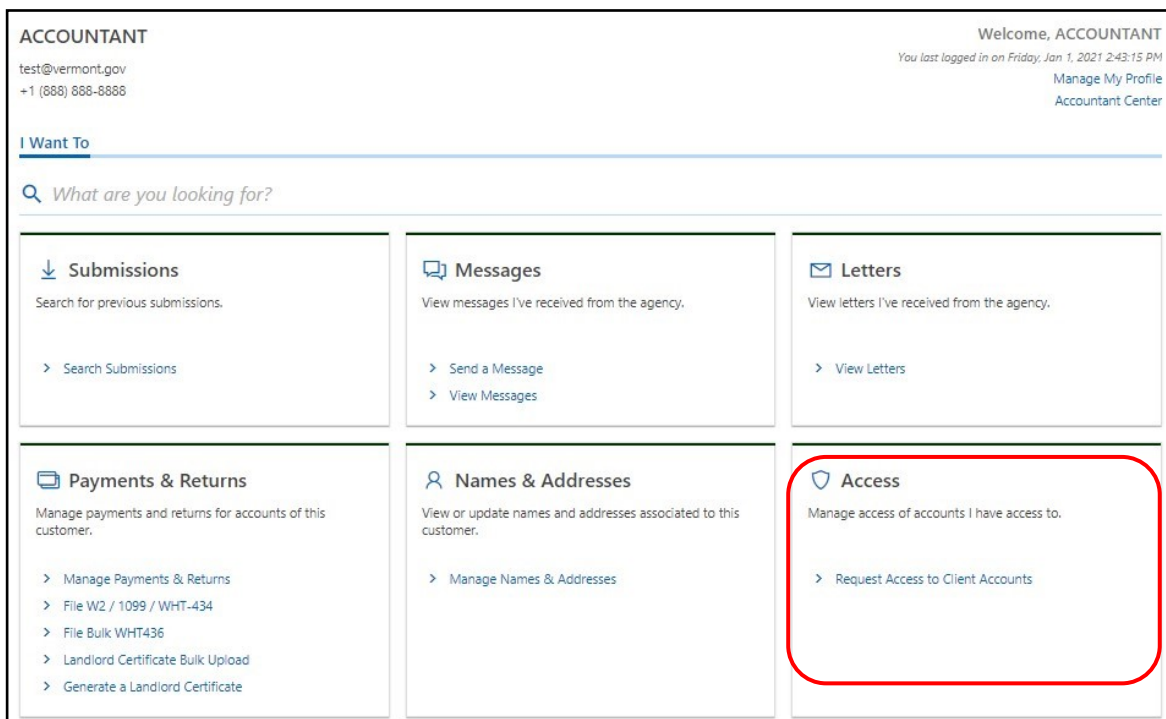
Step 2

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



Step 3

On your Home screen is a tab labeled **Access**. Click **Request 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 all your information is correct, click **Next**. If information is incorrect and you wish to change it, you will have to return to your homepage and click **Manage My Profile**.

The client does not need to have a myVTax account for you to access their tax account(s). If your client

does not have a myVTax account, this is the process you should follow to obtain access to the client’s tax accounts. If, however, your client has a myVTax account, we recommend the client initiate the process from that 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 in

this step shows the form for the **Individual**. Skip to **Step 6** to see the form for a **Business**. **Note:** all fields marked with a red asterisk require an answer.

Step 6

Taxpayer Information—Business

This is the view for a business taxpayer. Enter the taxpayer information requested as shown in the example. It's 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 **Other** **1** 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 **Yes**. **2** 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, 2019 and end with December, 2022. **3**

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**. **4**

Click **Submit** **5** to receive confirmation.

Step 8

Confirmation

Confirmation

Your confirmation number is 2-030-037-504

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.

Print 1

OK 2

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

Print the form by clicking **Print**. 1

The Department of Taxes requires that you have the client sign the form (below). The client’s **original signature** must be on this form in order to process your request.

Mail the completed and signed form to the Department using the address provided. Do **not** fax or email the form to us.

Clicking **OK** 2 brings you back to the Home screen.

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

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

Send completed request to:
 Vermont Department of Taxes
 133 State Street
 Montpelier, VT 05633-1401

Do not fax or email.