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## Overview

This document is for tax practitioners and others who manage client tax accounts. It explains the following:

- Language changes
- Settings & Payment Channels
- Businesses tab
- Accounts tab
- Submissions tab
- Correspondence tab

## Language Changes

The following terminology has been changed for clarification.

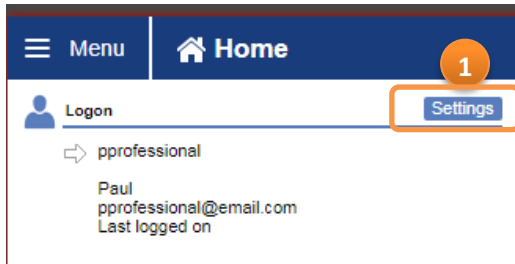
Old Term	New Language
All Accounts	Businesses
All Client Accounts	Shared for All Businesses
Cease Link	Remove this Payment Channel
Completed	Processed
In Progress	Not Submitted
Link to Add	Setup New Payment Channel
Not Submit	Not Submitted
Notices	Messages
Outstanding Balance	Pay Outstanding Balance
Payment Source	Payment Channel
Pending	Submitted
Requests	Submissions
Return Needs to be Filed	File Return
Save and Continue/Save and Finish Later	Save

## Home Screen

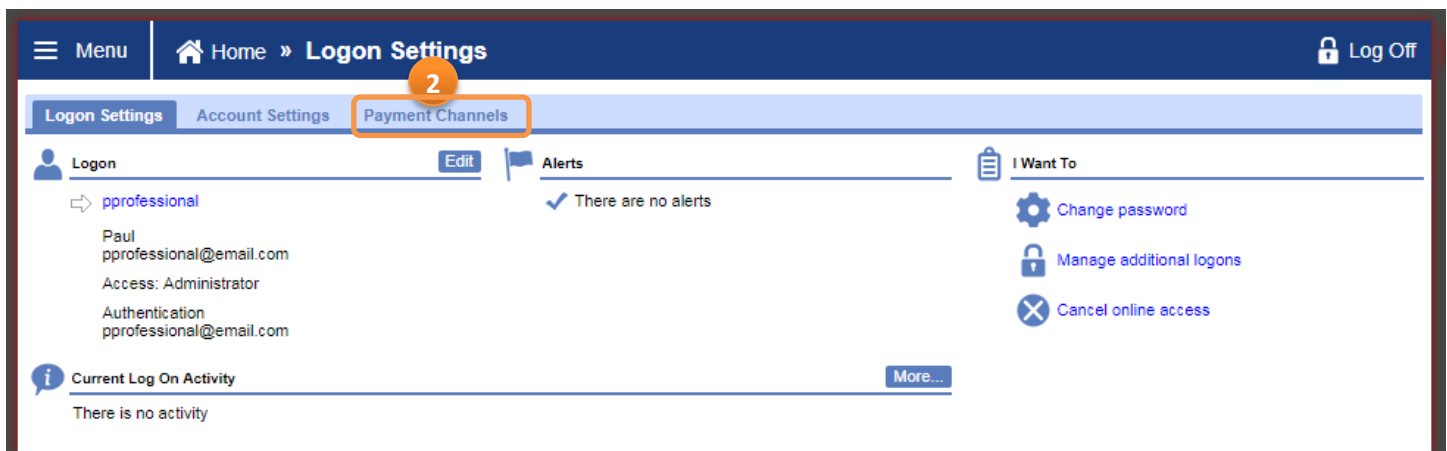
The important changes on the home screen are the way payment sources are set up and the tabs used to view account details.

### Settings & Payment Channels

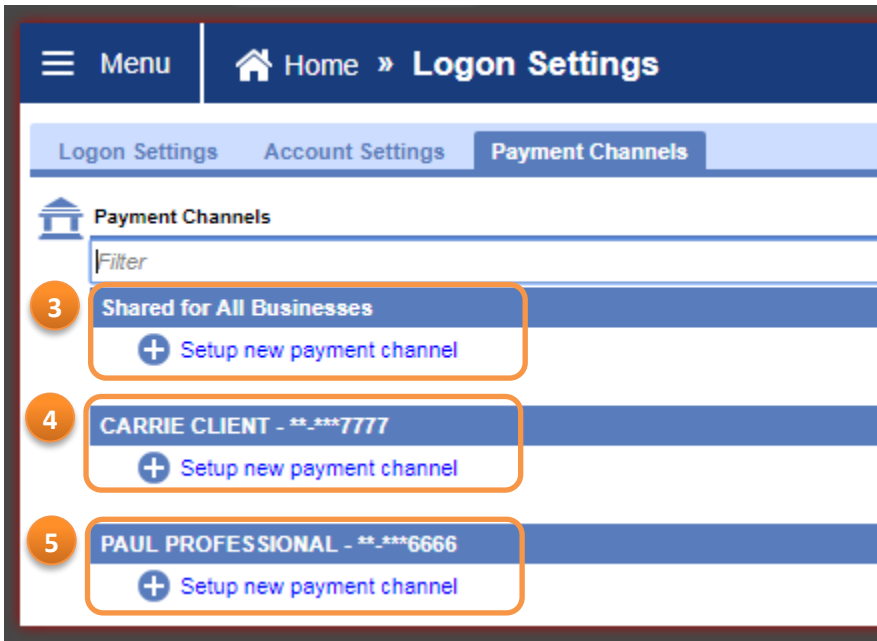
1. Click **Settings** to access Logon Settings, Account Settings, Payment Channels, Change Password, and Manage Additional Logons, Cancel online access, and see a TAP activity history.



2. Click the **Payment Channels** tab to set up payment sources for you and your client.

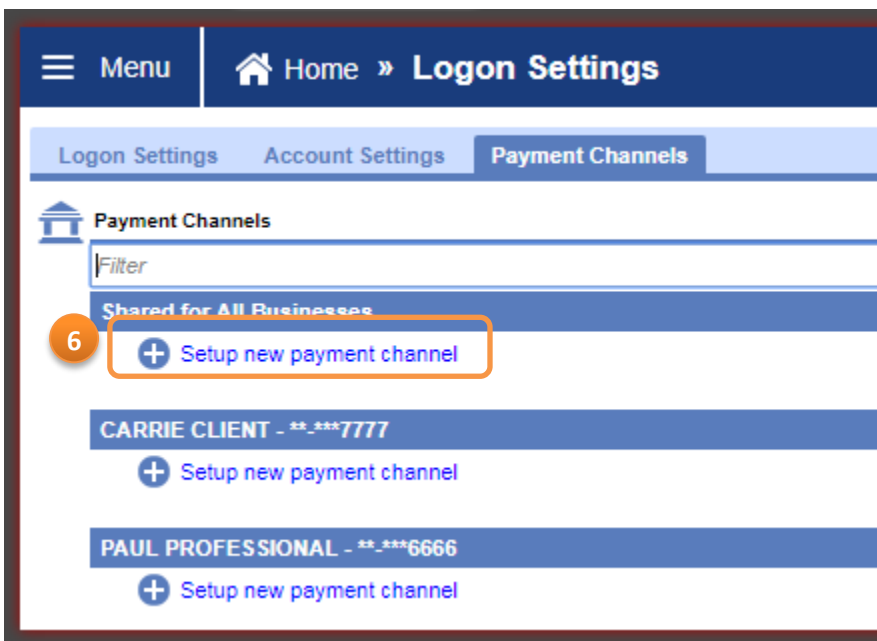


3. Use this to add a bank account for all business account(s) – including your own.
4. Use this to add a bank account for each tax account associated to your FEIN.
5. Use this to setup a payment source for each client’s tax account added to your TAP account.



ⓘ **Important:** Any accounts set up under the **Shared for All Businesses** option will include **your** personal and business account(s).

6. Click **Setup new payment channel** next to the plus sign.



7. Fill in the Bank Account information and give the account a name you will recognize.
8. Click **Save**.

Menu Home » Logon Settings » Add Payment Channel Log Off

Logon pprofessional Paul pprofessional@email.com

Payment Channel This payment channel will be available for you to use for all individuals and businesses.

Type Direct Debit - USA Bank

7

Bank Account

Bank Account Type Checking

Routing Number 124000054

Bank Name ZB, N.A. DBA ZIONS BANK

Account Number 1234

Confirm Account Number 1234

Use default name No Yes

Name Shared for All Businesses - Including Mine

Your online session will timeout after 60 minutes of inactivity. Save your work if you will be away from your computer.

8 Save Cancel

9. This payment channel is now ready to use.

Menu Home » Logon Settings » Shared for All Businesses - Including Mine

Payment Channel Rename Accounts Using This Payment Channel

Shared for All Businesses - Including Mine No accounts are using this payment channel

For: All Individuals and Businesses

Direct Debit - USA Bank

ZB, N.A. DBA ZIONS BANK

Checking

124000054

1234

Remove this payment channel

**ⓘ Important:** We suggest you give each payment channel a name that means something to you. The default shows the name of the bank with the last four digits of the bank account. This could get confusing if you have set up many accounts.

## Setting a Default Payment Channel

Default payment channels can only be set up by accessing the tax account as follows:

1. Click the client's account hyperlink.

The screenshot shows the TAP interface with the 'Businesses' tab selected. A red circle with the number '1' highlights the account hyperlink for 'CARRIE CLIENT'.

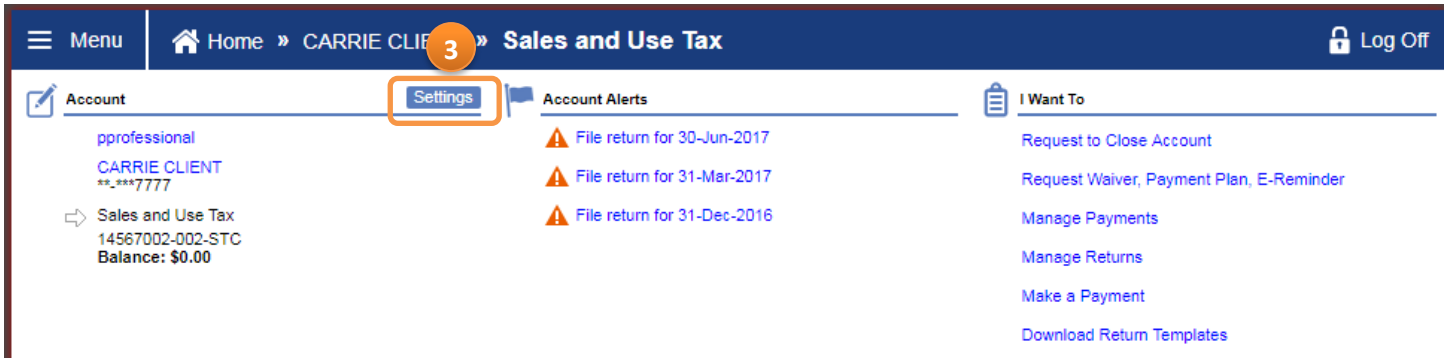
Business Name	Address	Balance
CARRIE CLIENT	333 S MAIN ST SLC UT 84111-2702	\$0.00
PAUL PROFESSIONAL	210 N MAIN ST SLC UT 84103-4619	\$0.00

2. Click the account hyperlink.

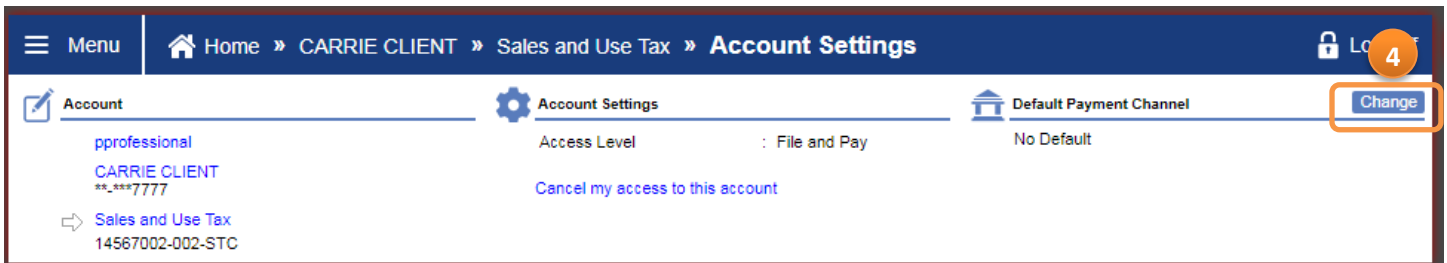
The screenshot shows the TAP interface with the 'Accounts' tab selected for 'CARRIE CLIENT'. A red circle with the number '2' highlights the 'Sales and Use Tax' account hyperlink.

Account Name	Account ID	Client Name	Balance
Sales and Use Tax	14567002-002-STC	CARRIE CLIENT	\$0.00
Withholding	14567002-004-WTH	CARRIE CLIENT	\$0.00

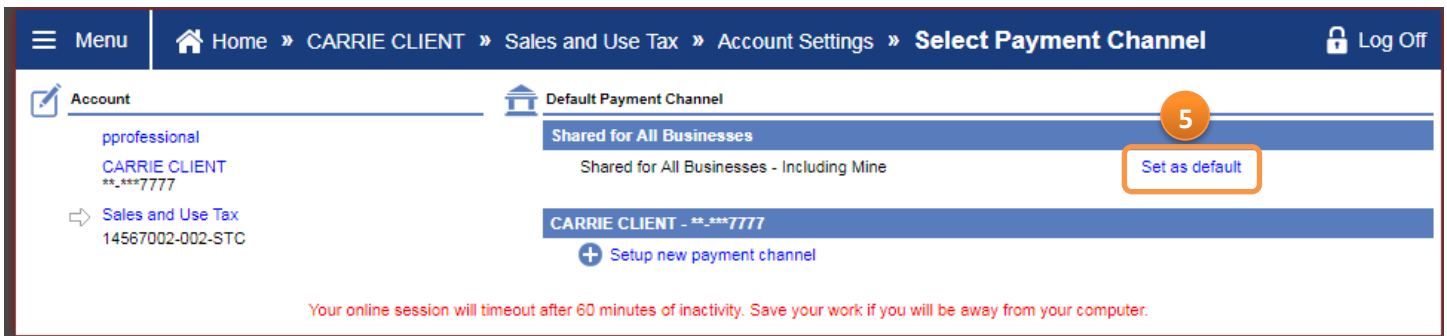
3. Click **Settings**.



4. Click **Change** next to the Default Payment Channel section.



5. Click **Set as Default**.



**Tabs**

**1. Business**

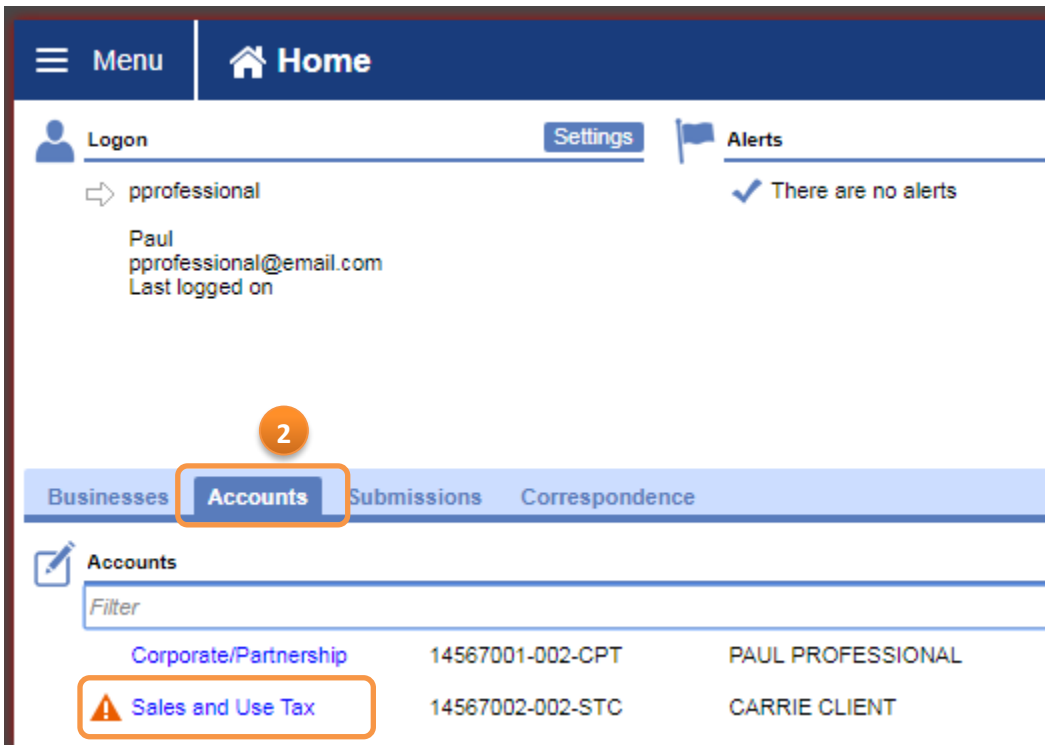
The **Business** tab shows ALL of the customer(s) you can access. Clients display in a grid. If you have more than eight clients, they will be in list form. Your business account is listed as well. Click the FEIN or account number hyperlink to access that client's tax accounts.

The screenshot shows the Utah's Taxpayer Access Point (TAP) interface. At the top, the logo 'UTAH'S TAP' is displayed next to the text 'UTAH'S TAXPAYER ACCESS POINT'. Below the logo is a navigation bar with 'Menu', 'Home', and 'Log Off' options. The main content area is divided into sections: 'Logon' (showing user 'pprofessional'), 'Settings', 'Alerts' (indicating no alerts), and 'I Want To' (with links for account access, waivers, returns, payments, and templates). A secondary navigation bar includes 'Businesses', 'Accounts', 'Submissions', and 'Correspondence'. The 'Businesses' section is active, showing a grid of two client entries. The first entry, 'CARRIE CLIENT', is highlighted with an orange box and includes a 'Needs attention' warning icon. The second entry is 'PAUL PROFESSIONAL'. Both entries show a balance of '\$0.00' and include address information. At the bottom, there are links for 'Utah.gov Home', 'Terms of Use', 'Privacy Policy', 'Accessibility Policy', and 'Translate Utah.gov', along with a copyright notice for 2017.

Client Name	Address	Balance
CARRIE CLIENT	333 S MAIN ST SLC UT 84111-2702	\$0.00
PAUL PROFESSIONAL	210 N MAIN ST SLC UT 84103-4619	\$0.00

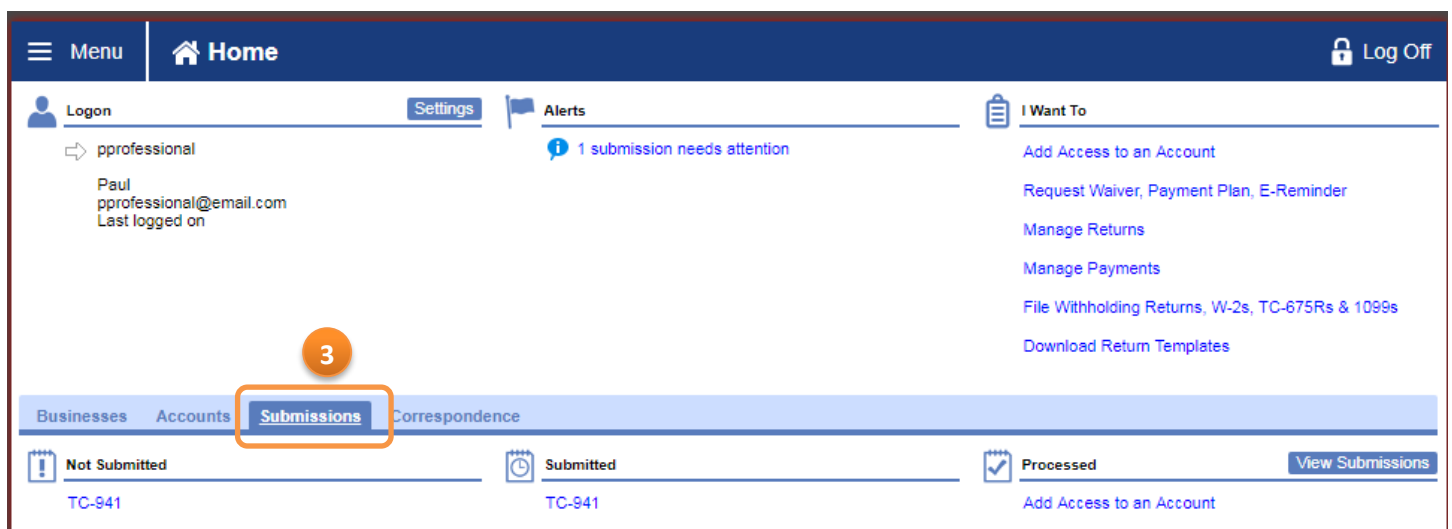
### 2. Accounts

The **Accounts** tab shows ALL of the tax accounts you can access. Click an account hyperlink to do work for that client.



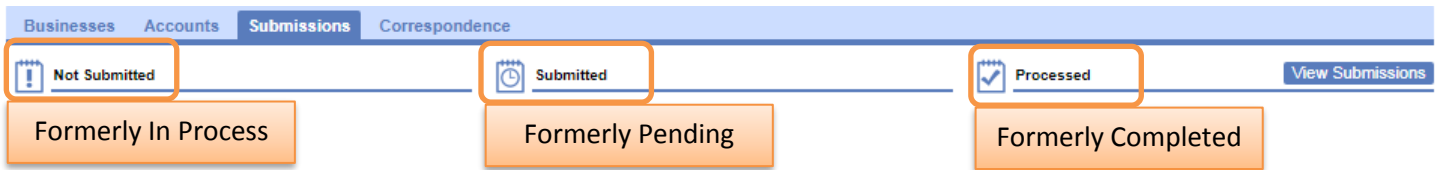
### 3. Submissions

The **Submissions** tab shows all requests you have submitted for ALL your clients. If you want to see submissions for one client only, go into that client's account and then click the **Submissions** tab.



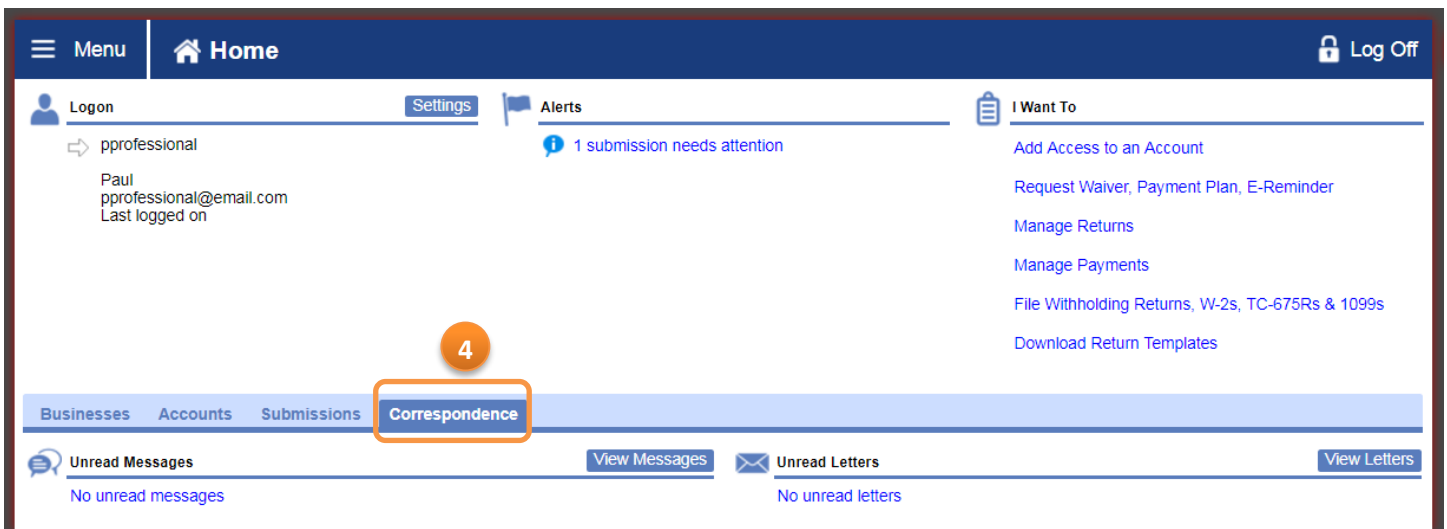


Submissions have been broken into three types using the new terms.



#### 4. Correspondence

The **Correspondence** tab shows e-messages and letters for ALL the customers you've added to your TAP account. If you want to see correspondence for one client only, go into that client's account and then click the **Correspondence** tab.



## Viewing Information for a Single Client

You can see tax accounts, submissions, and correspondence for a single client by:

1. Clicking the client's account hyperlink.
2. Clicking the appropriate tab.

The screenshot shows the TAP Home interface. At the top, there is a navigation bar with 'Menu', 'Home', and 'Log Off'. Below this, there are sections for 'Ligon', 'Settings', 'Alerts', and 'I Want To'. The 'Alerts' section shows '1 submission needs attention'. The 'I Want To' section lists various actions like 'Add Access to an Account', 'Request Waiver, Payment Plan, E-Reminder', 'Manage Returns', 'Manage Payments', 'File Withholding Returns, W-2s, TC-675Rs & 1099s', and 'Download Return Templates'. Below the navigation bar, there are tabs for 'Businesses', 'Accounts', 'Submissions', and 'Correspondence'. The 'Businesses' tab is selected, and a red circle with the number '1' highlights the 'CARRIE CLIENT' account card. The card shows the client's name, address (333 S MAIN ST, SLC UT 84111-2702), and a balance of \$0.00. A warning icon and 'Needs attention' text are also present.

The screenshot shows the TAP 'CARRIE CLIENT' page. At the top, there is a navigation bar with 'Menu', 'Home » CARRIE CLIENT', and 'Log Off'. Below this, there are sections for 'Ligon', 'Settings', 'Alerts', and 'I Want To'. The 'Alerts' section shows '1 submission needs attention'. The 'I Want To' section lists various actions like 'Add Access to an Account', 'Request Waiver, Payment Plan, E-Reminder', 'Manage Returns', 'Manage Payments', 'File Withholding Returns, W-2s, TC-675Rs & 1099s', and 'Download Return Templates'. Below the navigation bar, there are tabs for 'Accounts', 'Submissions', 'Correspondence', 'Names and Addresses', and 'Logons'. The 'Accounts' tab is selected, and a red circle with the number '2' highlights the 'Accounts' tab. Below the tabs, there is a table of accounts for 'CARRIE CLIENT'.

Account Name	Account ID	Client Name	Balance
⚠ Sales and Use Tax	14567002-002-STC	CARRIE CLIENT	\$0.00
Withholding	14567002-004-WTH	CARRIE CLIENT	\$0.00