TAP Changes Walkthrough for Practitioners September 2017

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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.

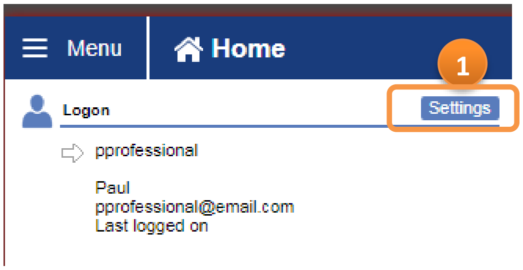
Old Term	New Language
All Accounts	Businesses
All Client Accounts	Shared for All Businesses
Cease Link	Remove this Payment Channel
Completed	Processed
In Progress	Not Submitted
Link to Add	Setup New Payment Channel
Not Submit	Not Submitted
Notices	Messages
Outstanding Balance	Pay Outstanding Balance
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

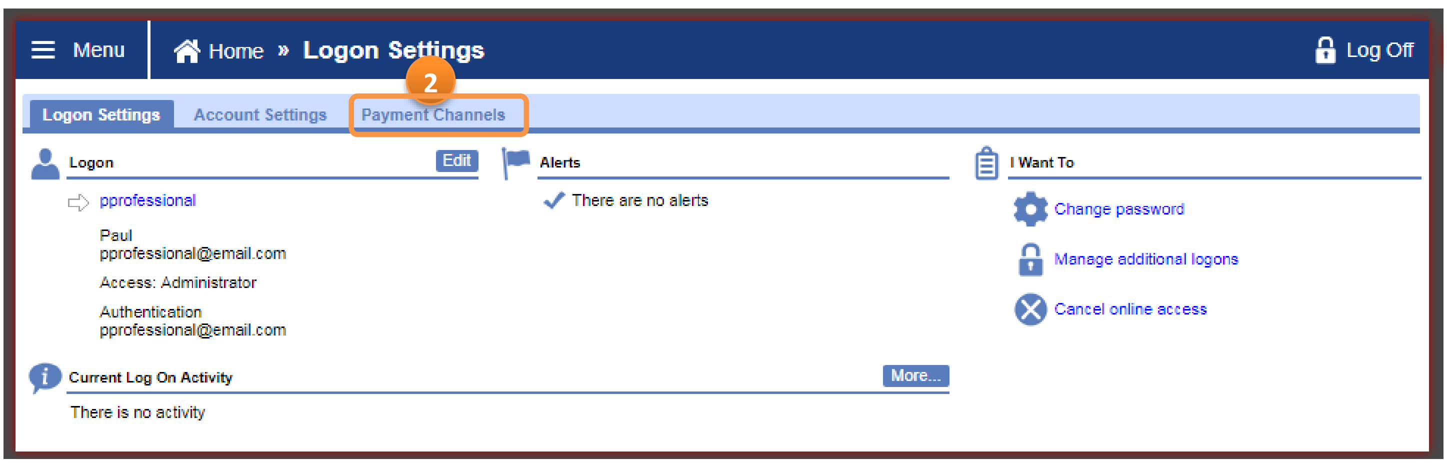
The important changes on the home screen are the way payment sources are set up and the tabs used to view account details.

Settings & Payment Channels

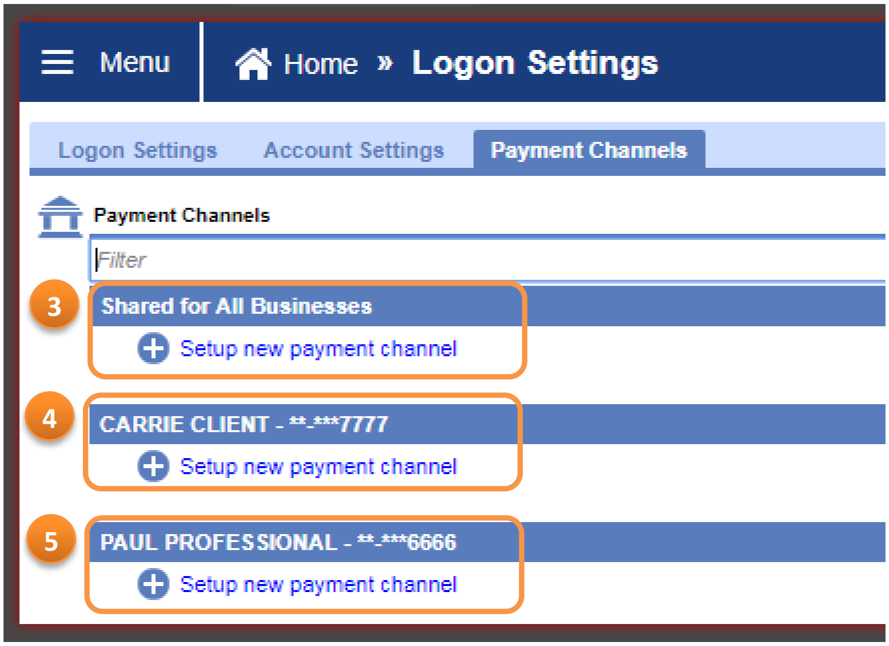
1. Click **Settings** to access Logon Settings, Account Settings, Payment Channels, Change Password, and Manage Additional Logons, Cancel online access, and see a TAP activity history.



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

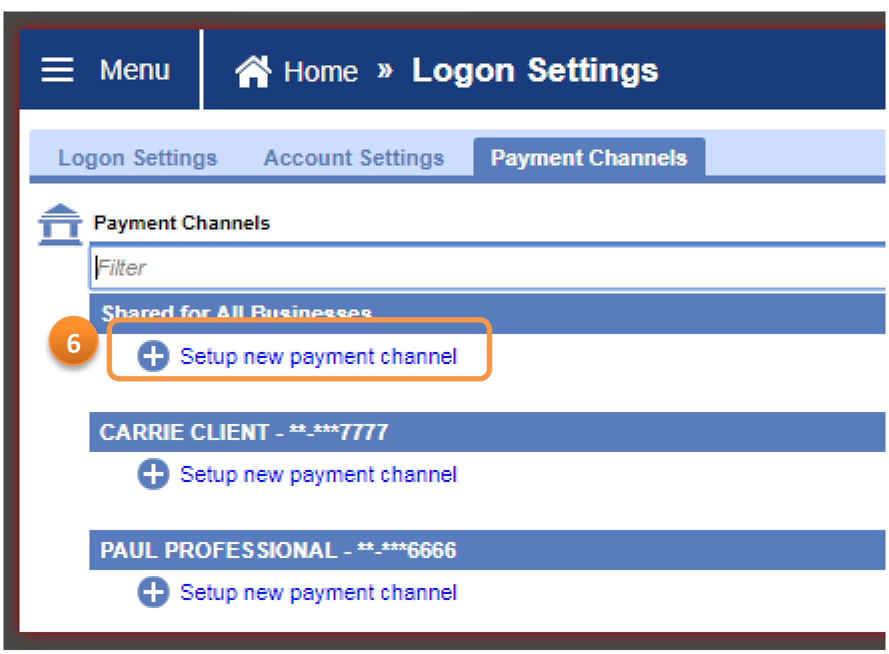


3. Use this to add a bank account for all business account(s) – including your own.
4. Use this to add a bank account for each tax account associated to your FEIN.
5. Use this to setup a payment source for each client's tax account added to your TAP account.

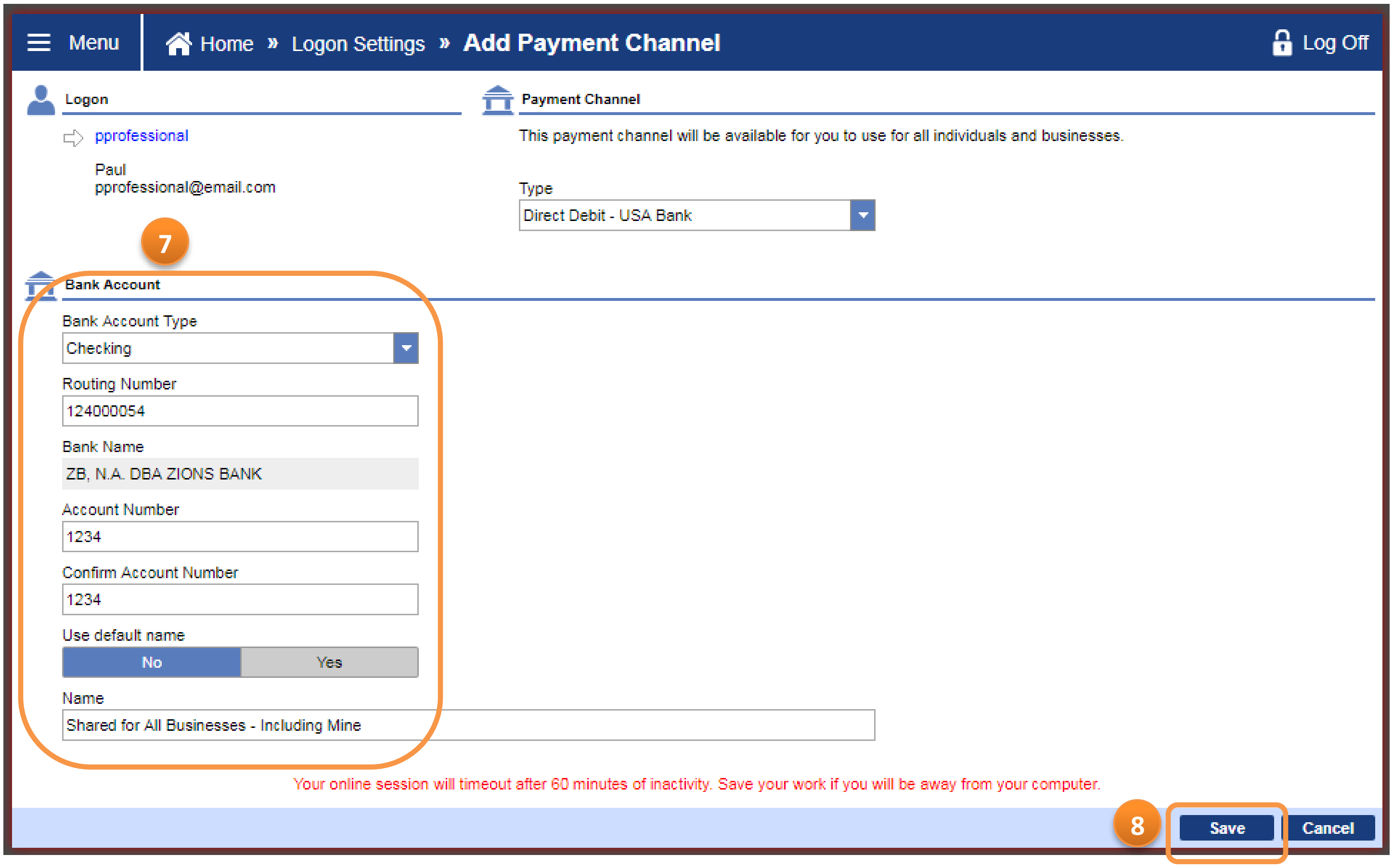


ⓘ**Important**: Any accounts set up under the **Shared for All Businesses** option will include ***your*** personal and business account(s).

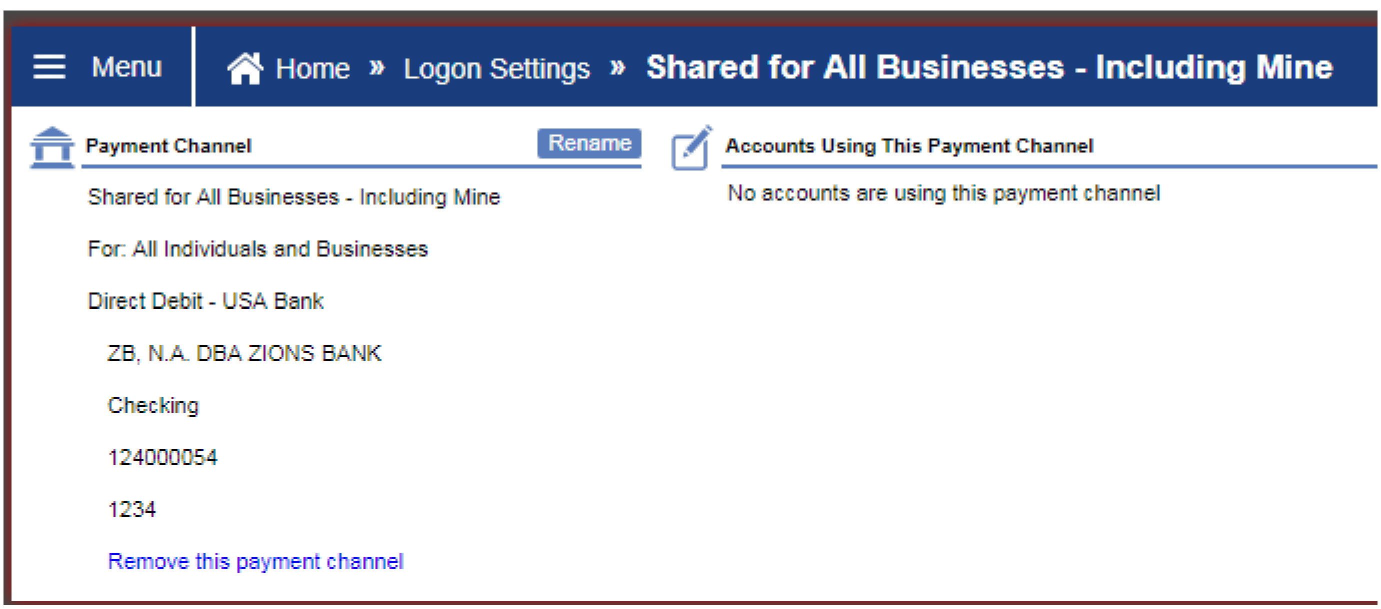
6. Click **Setup new payment channel** next to the plus sign.



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



9. This payment channel is now ready to use.

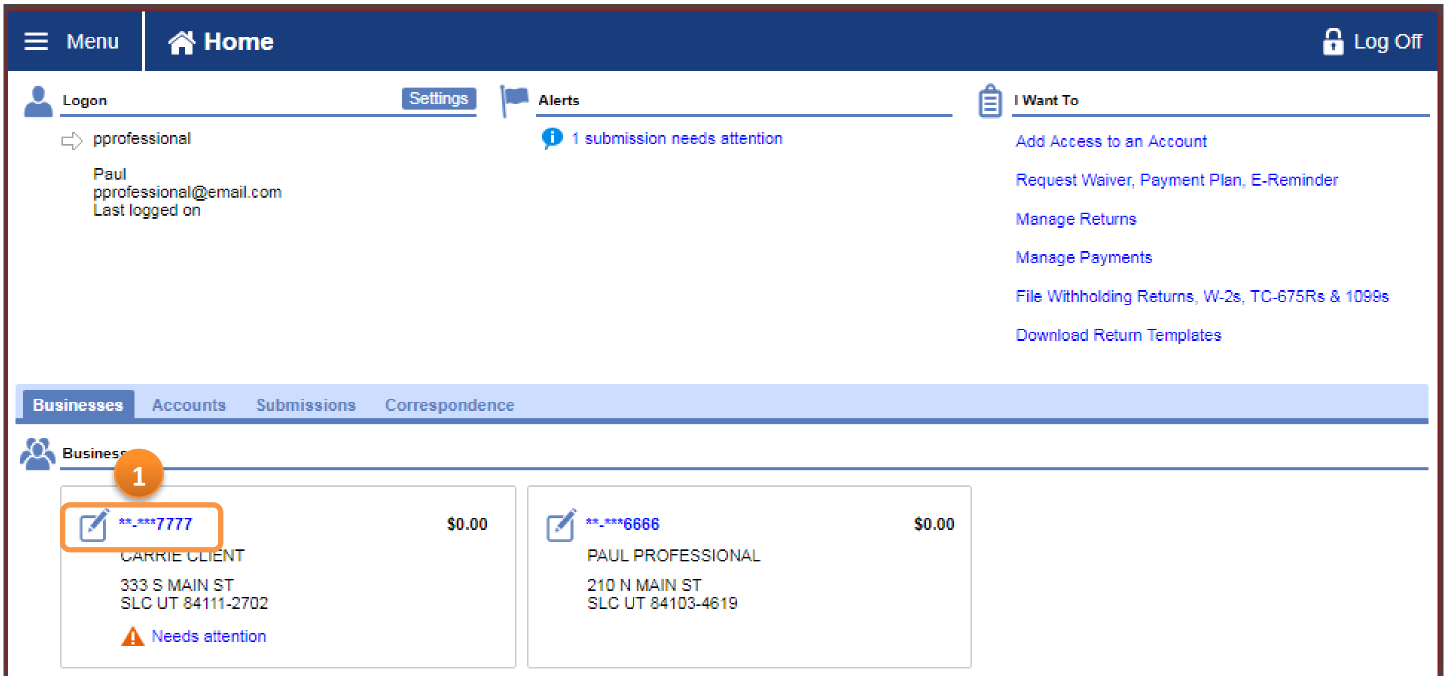


ⓘ**Important**: We suggest you give each payment channel a name that means something to you. The default shows the name of the bank with the last four digits of the bank account. This could get confusing if you have set up many accounts.

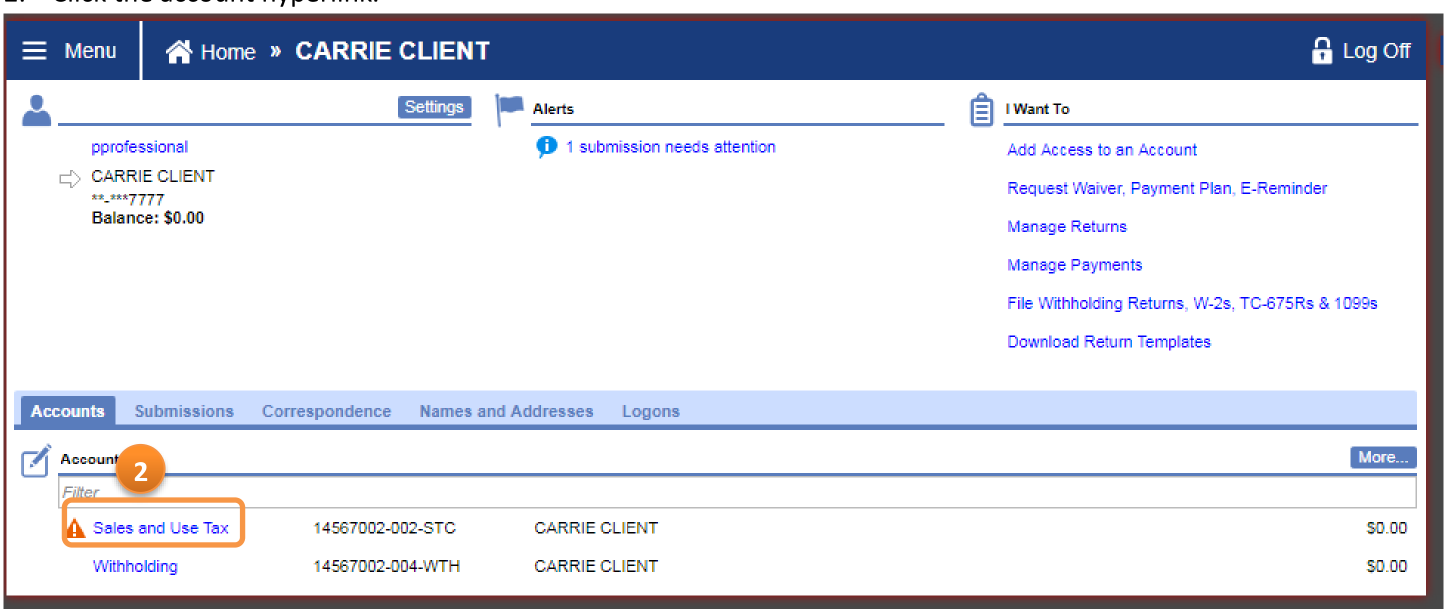
Setting a Default Payment Channel

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

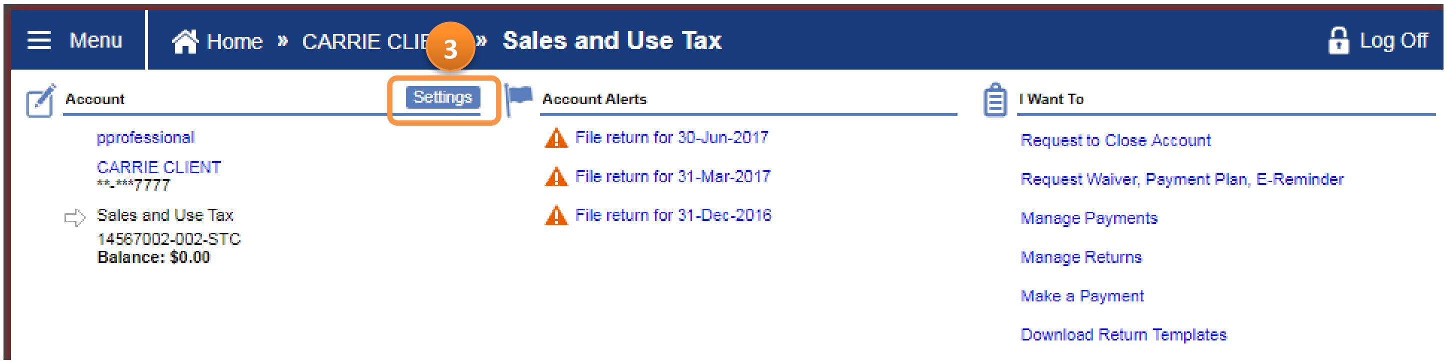
1. Click the client's account hyperlink.



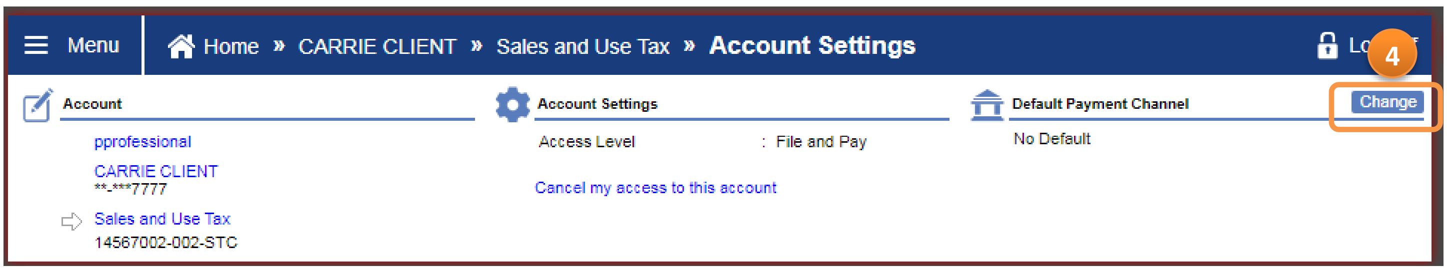
2. Click the account hyperlink.



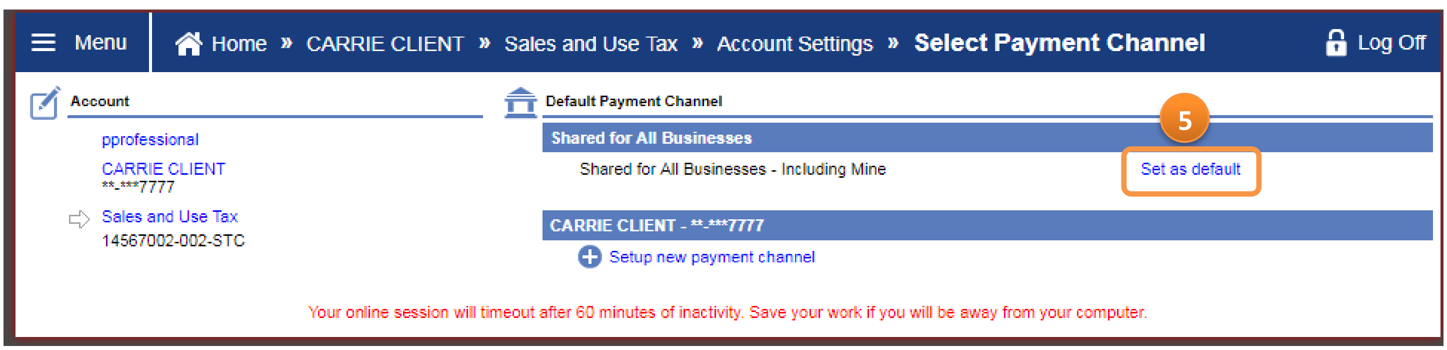
3. Click **Settings**.



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



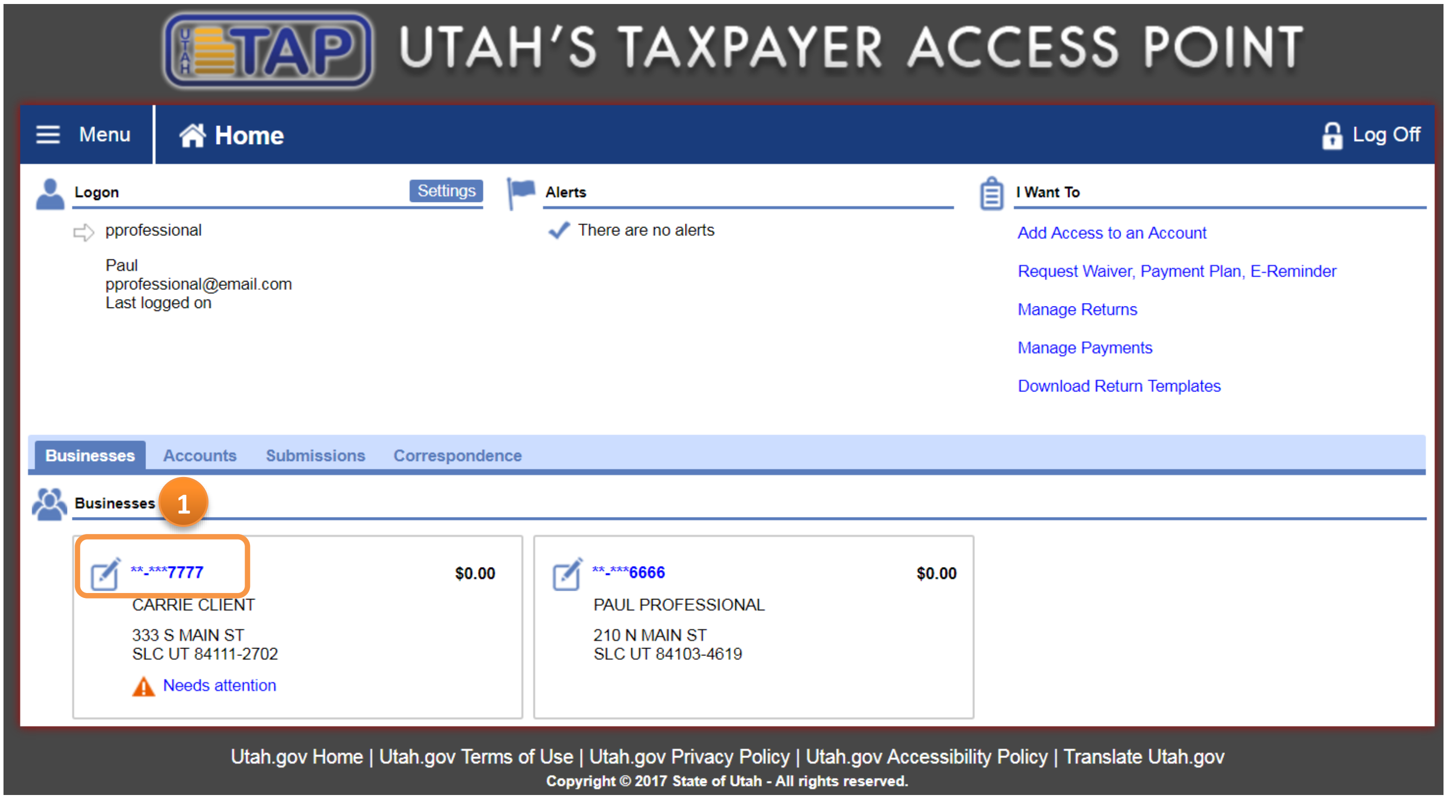
5. Click **Set as Default**.



Tabs

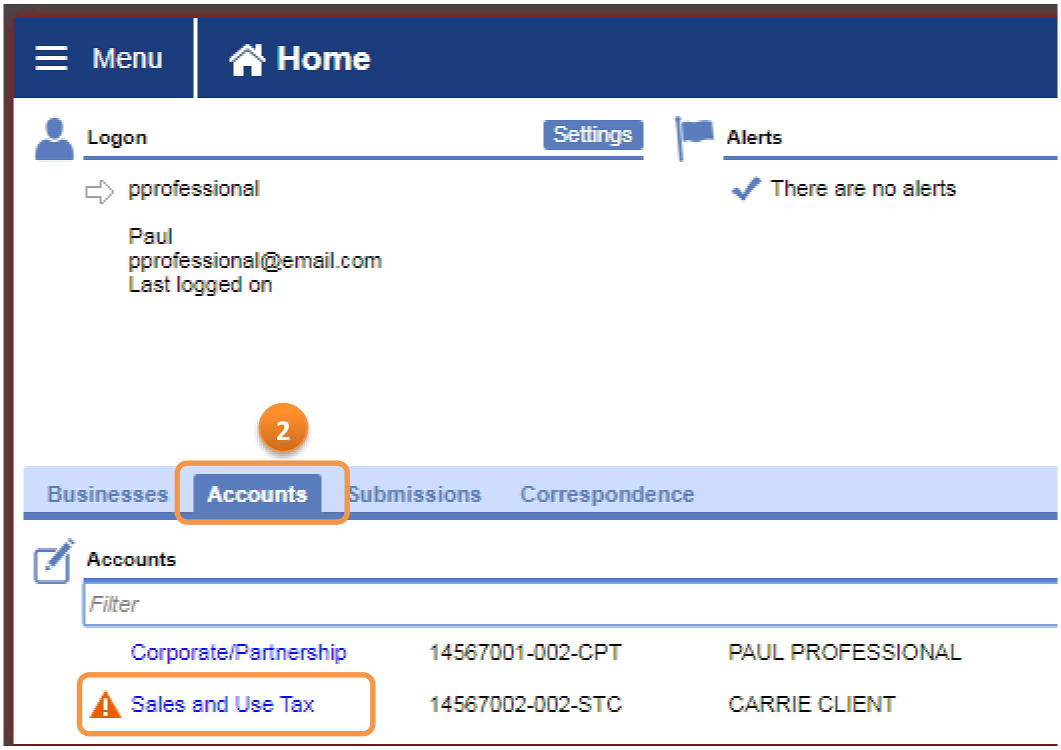
1. Business

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.



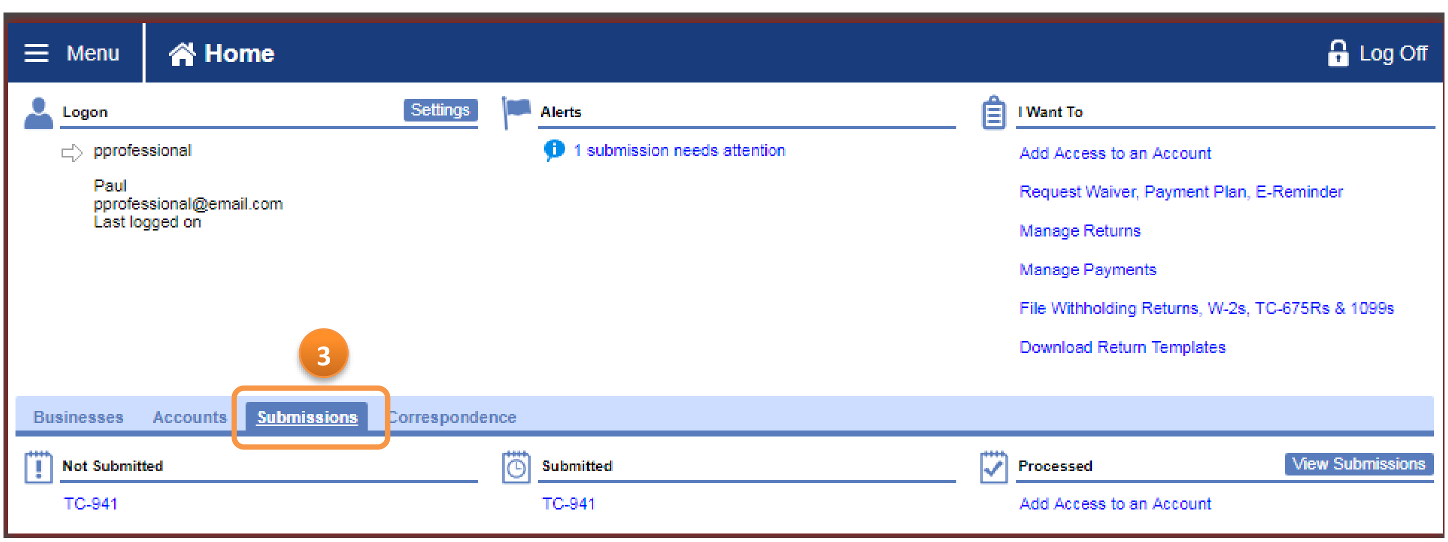
2. *Accounts*

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

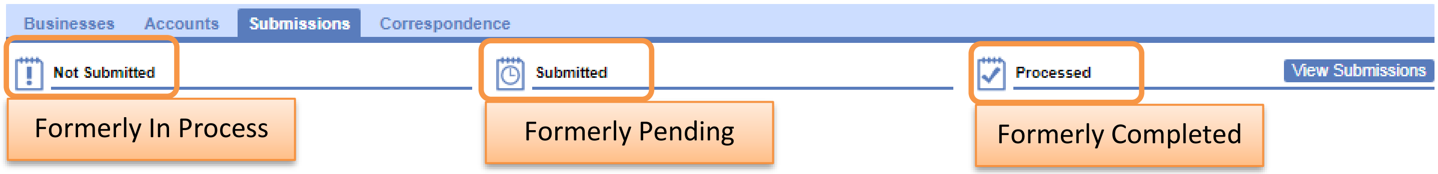


3. *Submissions*

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.