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Overview

This document is for taxpayers who file returns and pay on Taxpayer Access Point (TAP). It explains the following changes:

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

Language Changes

The following terminology has been changed for clarification.

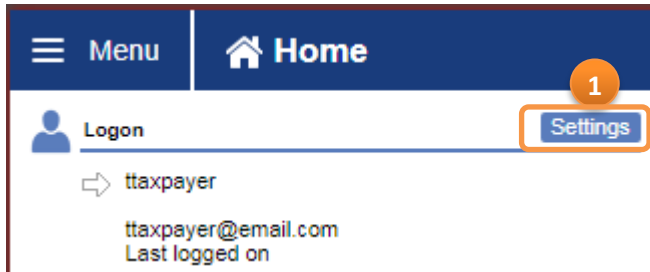
Old Term	New Language
All Accounts	Businesses
All Client Accounts	Shared for All Businesses
Cease Link	Remove this Payment Channel
Completed	Processed
In Progress	Not Submitted
Link to Add	Setup New Payment Channel
Not Submit	Not Submitted
Notices	Messages
Outstanding Balance	Pay Outstanding Balance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

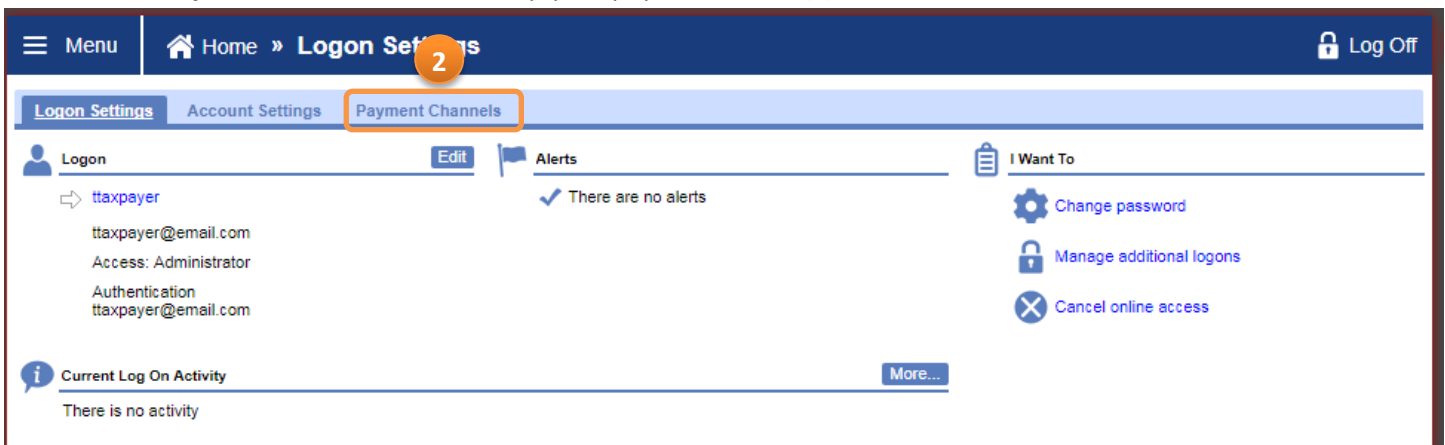
The important changes on the home screen are the way payment sources are set up and the tabs used to view account details.

Settings & Payment Channels

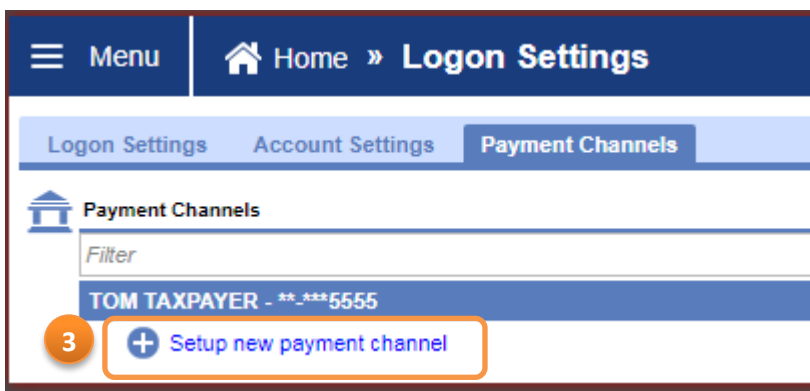
1. Click **Settings** to access Logon Settings, Account Settings, Payment Channels, Change Password, and Manage Additional Logons, Cancel online access, and see a TAP activity history.



2. Click the **Payment Channels** tab to set up your payment source(s).



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



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

Menu Home » Logon Settings » **Add Payment Channel** Log Off

Payment Channel

This payment channel will be available for you to use for all of this customer's accounts.

Type
Direct Debit - USA Bank

4

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
My Business Checking Account

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

5 Save Cancel

6. This payment channel is now ready to use.

Menu Home » Logon Settings » **My Business Checking Account**

Payment Channel Rename Accounts Using This Payment Channel

My Business Checking Account No accounts are using this payment channel

For: TOM TAXPAYER

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 account hyperlink.

The screenshot shows the TAP Home page. 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 'Accounts' section is highlighted, and a red circle with the number '1' is placed over the 'Withholding' account link. The account details for 'Withholding' are: 14567000-002-WTH, TOM TAXPAYER, and a balance of \$0.00.

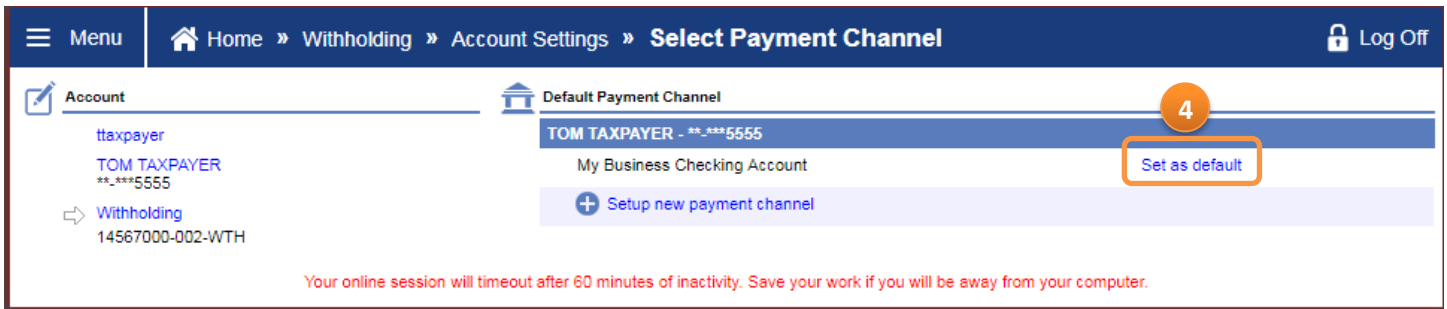
2. Click **Settings**.

The screenshot shows the TAP 'Withholding' account page. The breadcrumb trail is 'Home » Withholding'. The 'Settings' button is highlighted with a red circle and the number '2'. The account details for 'Withholding' are: 14567000-002-WTH, TOM TAXPAYER, and a balance of \$0.00. There are also 'Account Alerts' and 'I Want To' sections.

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

The screenshot shows the TAP 'Account Settings' page. The breadcrumb trail is 'Home » Withholding » Account Settings'. The 'Default Payment Channel' section is highlighted with a red circle and the number '3'. The 'Change' button next to it is also highlighted. The account details for 'Withholding' are: 14567000-002-WTH, TOM TAXPAYER, and a balance of \$0.00. There are also 'Account Settings' and 'I Want To' sections.

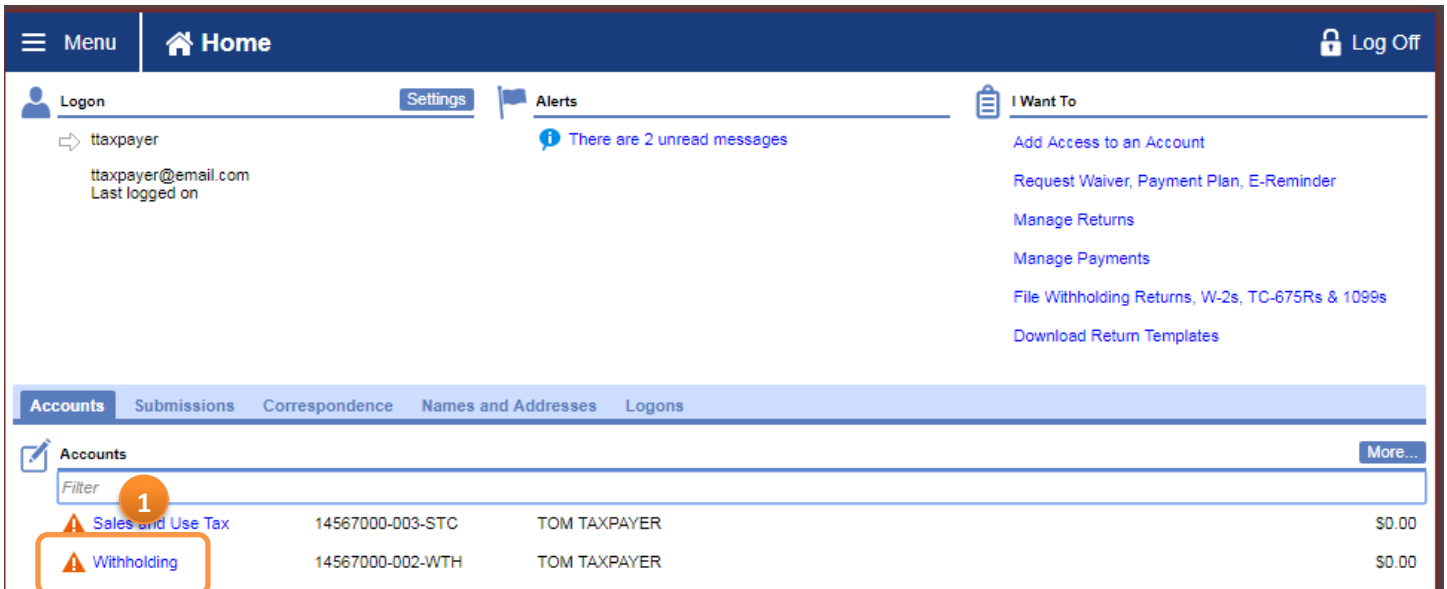
4. Click **Set as Default**.



Tabs

1. **Accounts**

The **Accounts** tab shows all your tax accounts. Click the tax type hyperlink to access that accounts.



Accounts	Submissions	Correspondence	Names and Addresses	Logons
Sales and Use Tax	14567000-003-STC	TOM TAXPAYER	\$0.00	
Withholding	14567000-002-WTH	TOM TAXPAYER	\$0.00	

2. Submissions

The **Submissions** tab shows all requests you have submitted.

The screenshot shows the TAP user interface. At the top, there is a navigation bar with 'Menu', 'Home', and 'Log Off'. Below this, there are sections for 'Logon' (showing 'ttaxpayer' and 'ttaxpayer@email.com'), 'Settings', 'Alerts' (with a notification for 2 unread messages), and 'I Want To' (with links for account access, waivers, returns, payments, and templates). A central navigation bar highlights the 'Submissions' tab, which is circled with an orange box and a '2' in a circle. Below the navigation bar, there are three main categories: 'Not Submitted' (None need attention), 'Submitted' (TC-941), and 'Processed' (None have been processed). A 'View Submissions' button is located on the right side of the 'Processed' section.

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

The diagram shows the 'Submissions' tab in the TAP interface. Three categories are highlighted with orange boxes: 'Not Submitted', 'Submitted', and 'Processed'. Below each category, an orange box explains the change: 'Formerly In Process' for 'Not Submitted', 'Formerly Pending' for 'Submitted', and 'Formerly Completed' for 'Processed'. A 'View Submissions' button is visible on the right.

3. Correspondence

The **Correspondence** tab shows e-messages and letters from the Tax Commission.

The screenshot shows the TAP user interface with the 'Correspondence' tab selected. The navigation bar at the top is the same as in the previous screenshot. The 'Correspondence' tab is circled with an orange box and a '3' in a circle. Below the navigation bar, there are two main sections: 'Unread Messages' (with 'Profile Updated' listed twice and a 'View Messages' button) and 'Unread Letters' (with 'No unread letters' and a 'View Letters' button).