Hello, my name is Annmarie Tracey and I am from the New York State Department of Taxation and Finance and I work in the taxpayer contact center.

Today we are going to discuss online service accounts. There are four different types of accounts. An individual account is needed to register or renew as a tax preparer or a refund facilitator. You may use your individual online services account to manage your own New York State tax obligations. And the Fiduciary account, if you file form 205, Fiduciary return. The next is the tax professional account. If you have an electronic filing identification number, an EFIN, with the IRS, you may create a tax professional online services account. A tax professional account allows you to access and manage your New York State clients right online. A business account. Create a business an online services account if you're an owner or officer of a company who has New York State tax filing obligations. Individual accounts. To create your online services account, visit the department's website at www.tax.ny.gov. Online service information is located on the left hand side of the department's home page. Select account login and create an account, to continue to the online services web pages.

Look on the online services home page for information on the various services currently offered. To continue creating the account, select create account.

Choose the account type that pertains to you. For today's presentation, we are going to select individual. Later in the presentation we will also review the tax professional account creation.

The major benefits of having an individual account are to register and renew as a tax preparer or refund facilitator. Web file certain returns and extensions. Make estimated tax payments. Pay bills and notices. Sign up for e-mail alerts and receive refund issued dates.

An individual account is created by using a social security number. During the account creation process, you must certify that the social security number being used is in fact yours. An employer or a tax professional should not create an individual account on behalf of their client. We will discuss accessing client information through a tax professional account later on in the presentation. The other information that you will need to create an individual account is the verifying information, Federal adjusted gross income, an assessment ID number or a PIN number. Your personal contact information, and a user name and password. So let's take a look at a few screens on how to create the individual account.

On the first page of the individual account creation, enter your nine digit social security number in the taxpayer ID field. The Department will occasionally issue a five digit personal pin to assist taxpayers in the account creation process. If you received a letter from the Tax Department with a pin, choose that option when creating that individual online services account. If you do not have a pin, select no to the question and click continue.

On the individual verification page, enter in your name and chose your verification method that fits your filing scenario.

After the account is created, use your username and password to login. Your account summary allows you to view a detailed history of tax return filings, including type of form, filing method and confirmation number. You can view images and print electronically filed returns, view payments and prepayments, view and edit personal contact information and sign up for account specific emails and much more. To register, or renew as a tax preparer, or refund facilitator, locate the tax preparer registration program service in the left hand services menu. Expand the menu and select Register myself as a tax preparer.

Selecting register myself as a tax preparer will open up the tax preparer registration application in a new window. To continue with the registration process, select Register as a tax preparer.

For additional information on how to register yourself as a tax preparer, who must register and pay, and the new continuing education requirements, visit our website.

Now we'll take a look at the tax professional account and learn how you can manage your client's information right online.

Tax professional accounts. You may want to encourage your employer to create a tax professional account or maybe you will open your own business at some point and want a tax professional account. Tax preparers are not required to create a tax professional online services account. Those of you who work for a tax preparation firm are often added as users of the firm's tax professional online services account. This is not something that is done by the tax preparer, rather the firm’s online services master administrator adds the firms employees as users. This allows the employees to get the benefits of a tax professional account, such as accessing client information, if authorized by the client.

A tax professional account gives you the ability to access tax department information for your clients which includes view detailed account summaries, web file certain returns and make payments.

If your EFIN is associated with an EIN number, you must indicate each tax type that the business has filed New York State returns for the last 12 months. Corporation, sales or withholding. Once selected, you will be prompted to enter line specific information. If no returns have been filed for the last 12 months, no further information is required.

If your EFIN is associated with your social security number, you will be asked to enter the federal adjusted gross income from a New York state income tax return filed within the past 3 years. If you have not filed a personal income tax return within this time, no further information is required.

After the account is created, use your username and password to login. If you verified tax return information with your EIN when creating the account, you will see account summary information for your business upon logging in. Accounts created with an EIN or social security number with no return information will only have access to client related information. The client information is the central location for clients on all the tax professional accounts. It allows you to access and maintain the clients you have added to your account after obtaining authorization on the TR2000 E-Z rep.

When adding a business or individual client into your tax professional account, you will have to have three items. A signed TR2000 from your client, your client’s taxpayer id number, or a client’s return or assessment information.

Obtaining an E-Z rep TR2000 form from your client is the first step in accessing their information online. Your client must complete and sign the form. You will then enter in the information from the form in your online services account. Your client will receive a letter in the mail confirming information that you have access to. Once the client has been added to your account, you will immediately be able to speak with a department representative, receive confidential taxpayer information relating to filings, assessment notices, as well as conduct transactions on behalf of the client through the tax professional online services account.

To add a client to your tax professional account, choose add business client or add individual client from the client information box. For this presentation, we will walk you through the process of adding an individual client.

Enter in the client's taxpayer's id and select their filing type.

Use the TR2000 your client signed to fill in the client's permission list. Important fields from the form include the client authorized tax matters, expiration date and the client's self-selected pin.

After selecting save on the clients permission list, you will be brought to your clients listing. To repeat the process for additional clients, choose add an individual client. There are several ways on the page you can select a client from your client listing. Search the client name or id in the search box. Locate the client in the client listing and click on the clients name or choose your client in the client information drop down box and click go.

Once you've selected a client, you will be brought to the clients account summary page. The services you have access to in the services section and the information displayed are driven by the TR2000's permission page. To file a return or make a payment on behalf of your client, expand the services menu categories and click on the application link.

You'll see that these applications pull in your client's information. Any transaction you complete on behalf of your client through the tax professional account will include your first and last name and the firm name.

Owners of a tax professional account have the ability to add an unlimited number of users, employees, to your tax professional account. You can create a separate user name and password for each user, manage permissions to perform online services for your business, manage access and permission from your clients list, delegate authority to your users to perform administrative tasks.

To access information in your tax professional account, expand your list of services located in my account box and select manage users. The user summary provides you with the list of your account users. You can view their permissions, edit their information or remove them from your account at any time. To add a new user, select the add user button.

The department also offers services you can use without Online Services accounts. You can subscribe to our subscription service to get the latest department information delivered right to your inbox, receive form 1099G information online, apply for an extension, penalty and interest calculator and refund lookup page.

So let’s summarize the information that we’ve reviewed. We’ve reviewed the online services overview and account types, locating information on the department’s website, individual account creation and features, tax professional account creation and features, and the resources available without an online services account.

This concludes the presentation of the online services accounts.