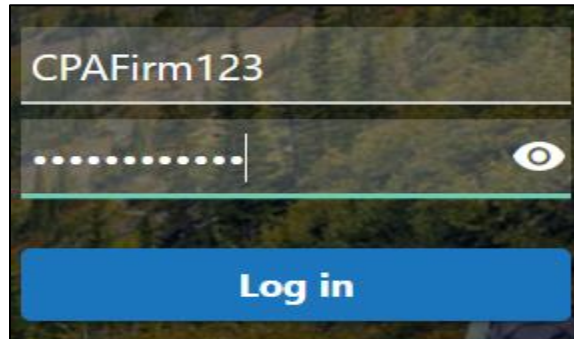


## TransAction Portal (TAP) Requesting 3<sup>rd</sup> Party Online Access

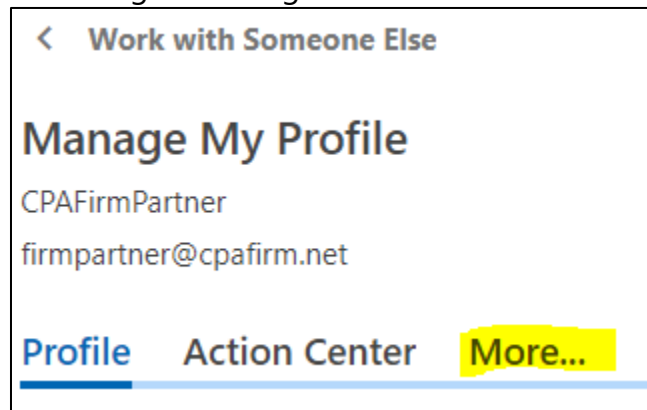
1. TAP Homepage - <https://tap.dor.mt.gov/>
2. Login



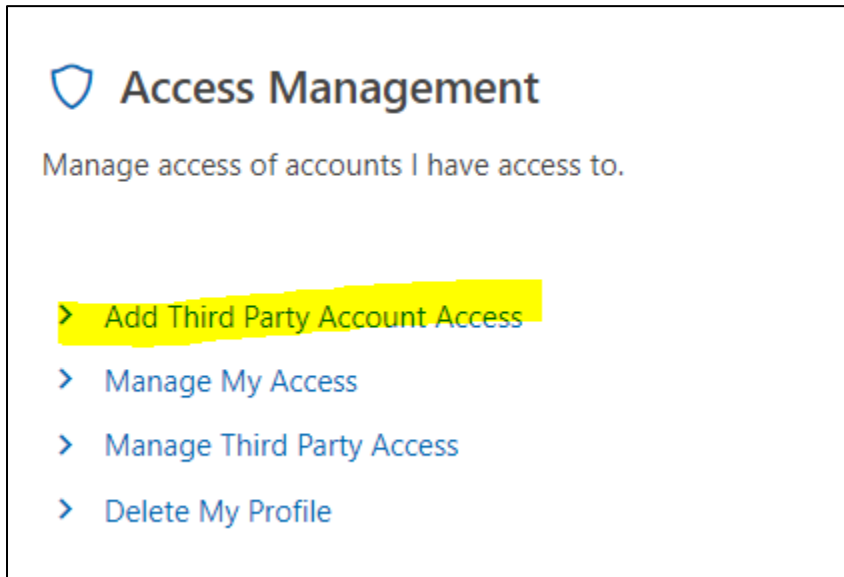
3. Login Homepage – 2 ways to request 3<sup>rd</sup> Party Access.
  - a. Select “Manage My Profile”



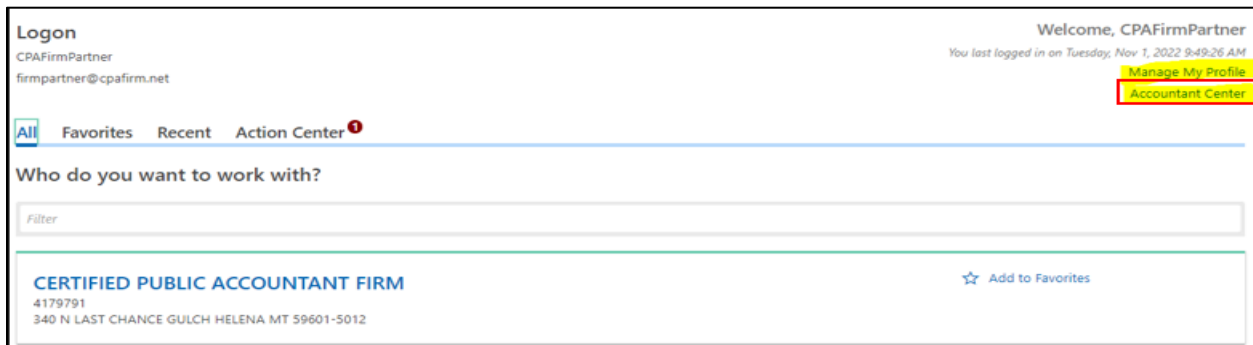
- i. Profile Management Page – select the “More” tab.



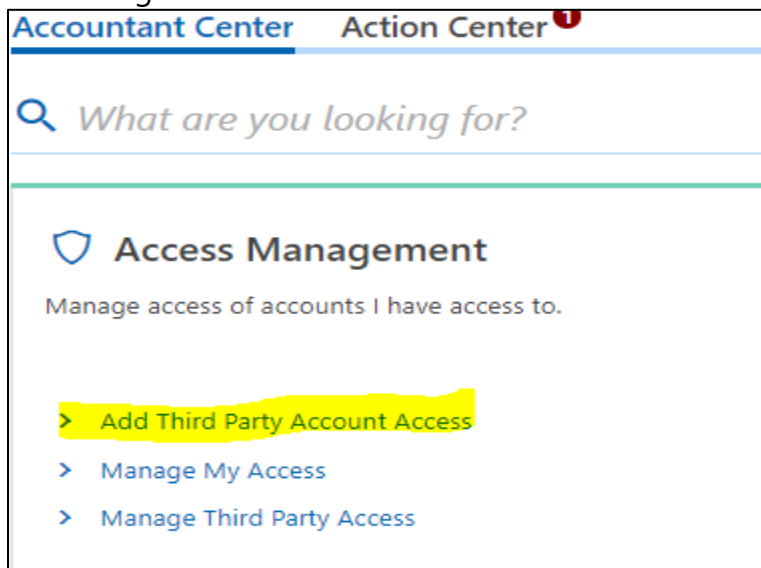
- ii. In the Access Management tile – select the “Add Third Party Account Access” link.



- b. Select the “Accountant Center.”



- i. Select “Add Third Party Account Access” from the Access Management Tile



4. Select the account type – i.e., Individual Income Tax, Withholding, etc.

Add Third Party Account Access

CPAFirmPartner  
firmpartner@cpafirm.net

**Account**

Choose Account Type

Select the account type you would like to gain access to

Individual Income Tax

5. Client Tax Account Authentication

a. Individuals

- i. Double Entry SSN
- ii. Last Name as it appeared on the most recent return filed with Montana.
- iii. Federal Adjusted Gross Income from Form 2

b. Withholding Accounts

- i. Enter the 13-digit account ID for the target account
- ii. Enter the 5-digit zip code from the account
- iii. Validate
  - 1. FEIN
  - 2. Last Amount Paid or
  - 3. Total Wages Paid

c. Other Business Accounts

- i. Enter the 13-digit account ID for the target account
- ii. Enter the 5-digit zip code from the account

## 6. Summary

- a. Optional: Enter your client's email (Recommended)
- b. Affirmation

**Account**

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Choose Account Type    Individual Income Tax Account Authentication    Summary

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Account Type : Individual Income Tax  
Account ID : 4228421-002-IIT  
Last Name : CLIENT 4  
SSN : \*\*\*-\*\*-3357

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You are requesting third party access to the account listed above and will automatically be granted **Pay Only** access to this Individual Income Tax account when you submit this request.

**Important:** To upgrade your access for this Individual Income Tax account to **File and Pay** complete the steps below:

1. Enter your client's email address to notify them that you have been granted **Pay Only** access to this Individual Income Tax account and to provide them with instructions on how to increase your access to **File and Pay** access to for this account.
2. Save the **confirmation number** you receive when you submit this request. You **MUST** contact your client directly to provide them this confirmation number. Note: The confirmation number will **NOT** be provided in the email sent to the client for security purposes.
3. Your client will need to go to the TAP home page <https://tap.dor.mt.gov> and select the **Grant Third Party Account Access** link and follow the instructions within that link to complete your file and pay access request.

**Optional:** Enter your client's email \_\_\_\_\_

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By submitting this request I declare under penalty of false swearing that the information being submitted in this form is true, correct, and I am authorized on behalf of the individual or business above to access this account. \*

## 7. Submit

## 8. Confirmation

- a. Always save the 10-digit confirmation number (X-XXX-XXX-XXX) for your records.

**Confirmation**

Your request for third party account access has been submitted.

Your confirmation number is **1-876-967-424**.

If an email was provided with your request or if the owner of the account you have requested access to has a TAP account, an email will be sent with instructions to increase your third party account access level.

If you have any questions or concerns please contact us at (406) 444-6900 or visit [mtrevenue.gov](http://mtrevenue.gov).

**Printable View**

**OK**

9. Pay Only Access

- a. Go back to your Login home page and select the customer/account you requested access to.
- b. Notice that TAP does not allow the same options for this account that it does for others.

The screenshot shows a user interface for a client named 'CLIENT 4, INDIVIDUAL'. The header includes the client's name, address (340 N LAST CHANCE GULCH, HELENA MT 59601-5012), and tax ID (MT Tax # 4228421). A navigation menu contains 'Summary', 'Action Center' (with a notification icon), 'Settings', and 'More...'. The main content area displays 'Individual Income Tax' with the same client details and an 'Action Center Items' link. A prominent box shows the tax ID 'ID 4228421-002-IIT' and a balance of '\$2,938.59'. To the right of this box are two links: '> Make a Payment' and '> More...'. At the bottom, a warning states: 'Your online session will timeout after 45 minutes of inactivity. Save your work if you will be away from your computer.' Below this is a footer with links for 'Department of Revenue | DOR Online Services | Department of Justice | Contact Us | Request Support ID | Help'. The top right corner shows a welcome message 'Welcome, CPAFirmPartner' and a login timestamp 'You last logged in on Tuesday, Nov 1, 2022 9:49:26 AM', along with links for 'Manage My Profile' and 'Accountant Center'.

- c. Your client can authorize more access using the confirmation number of your request.

## Account Types Accessible with a TransAction Portal (TAP) Login

Account Code	Account Type	State Agency
911	911 Emergency Telephone Fee	DOR
BCT	Beer Connoisseur Tax	DOR
BDT	Bad Debts	DOR
BEN	Bentonite Production Tax	DOR
BET	Beer	DOR
BSD	Brewery Storage Depot License	DOR
CAI	Cannabis Individual	DOR
CAL	Cannabis License	DOR
CAN	Cannabis Tax	DOR
CCT	Consumer Counsel Fee	DOR
CDL	Card Dealer License	DOJ
CGP	Coal Gross Proceeds	DOR
CGR	Contractors Gross Receipts Tax	DOR
CGT	Cement & Gypsum Prod License Tax	DOR
CIG	Cigarette	DOR
CLT	Corporate Income Tax	DOR
COG	Oil & Gas Production Tax	DOR
CON	Connoisseur License	DOR
CRC	Card Room Contractor	DOJ
CSA	Concession Agreement	DOR
CST	Coal Severance Tax	DOR
DBR	Domestic Brewery License	DOR
DER	Disregarded Entity	DOR
DSM	Distilled Spirits Manufacturer License	DOR
DWR	Winery License	DOR
EEL	Electrical Energy Production License Tax	DOR
ELT	Excise and License Tax	DOR
FBI	Foreign Brewery Import License	DOR
FID	Fiduciary	DOR
FWI	Foreign Winery Import License	DOR
GEP	Gambling Event Permit	DOJ
GOA	Gambling Operator	DOJ
HCT	Hard Cider	DOR
HEF	HELP Entity Fee	DOR
HIF	HELP Integrity Fee	DOR
HUF	Hospital Fac Utilization Fee	DOR
IIT	Individual Income Tax	DOR
IPR	Industrial Property Reporting	DOR
LCT	Common Carrier Tax	DOR
LFT	Lodging Facility Sales and Use	DOR
LGT	Live Game Tax	DOJ
LIQ	Agency Liquor Store Account	DOR

LPC	Livestock Per Capita	DOR
LST	Lodging Sales	DOR
LVA	Liquor Vendor Acct	DOR
MDR	VGM Route/Manufacturer/Distribution	DOJ
MMG	Metal Mines Gross Proceeds	DOR
MML	Metalliferous Mines License Tax	DOR
MMN	Miscellaneous Mines Net Proceeds	DOR
MMP	Medical Marijuana Provider Tax	DOR
MRW	Mineral Royalty Withholding	DOR
NFB	Nursing Fac Utilization Fee	DOR
ODL	Opioid Distributor License	DOR
OFF	Off-Premises License	DOR
ONP	On-Premises License	DOR
OTP	Other Tobacco Products	DOR
PPR	Personal Property Reporting	DOR
PSR	Public Service Regulation Fee	DOR
PTR	Partnership	DOR
RCT	Railcar Tax	DOR
RIT	Resource Indemnity Trust Tax	DOR
RTE	Retail Telecom Excise Tax	DOR
RVT	Rental Vehicle	DOR
SBC	Small Business Corporation	DOR
SPP	Liquor Special Permit License	DOR
TDD	Telephone Device for the Deaf	DOR
VGD	VGM Development	DOJ
VGM	VGM Tax	DOJ
VRL	Vendor Rep License	DOR
WCT	Wine Connoisseur Tax	DOR
WET	Wholesale Energy Transfer Tax	DOR
WIT	Wine Tax	DOR
WSL	Wholesale License	DOR
WTH	Withholding	DOR