

## **How to Add Accounts to Service Agents with Prorate and Fuel Tax Services in Taxpayer Access Point, TAP.**



Welcome to the Washington State Department of Licensing Taxpayer Access Point, TAP. The information you will see in this tutorial is completely fictitious. It has been made up and is intended for instructional purposes only. Any resemblance to a real person or business is entirely coincidental. TAP uses pop-ups to assist in the registration process. We recommend you disable the pop-up blocker settings and allow pop-ups from the TAP website.

In this tutorial, Service Agents will learn how to add their customer's accounts to their account through our Taxpayer Access Point, TAP.

At any time during this process you can save your work by clicking on Save and Continue or by clicking on Save and Finish Later. The Save and Finish Later option will allow you to exit TAP and return at a later time or date to complete your request.

For this tutorial, TAP was accessed by using the Internet Explorer browser. You can use other browsers (Google Chrome, Mozilla Firefox, Safari, etc.) to access TAP but there might be slight differences in how the screens display.

Enter your **Username**, **Password** and click on **Login**.

**IFTA / Prorate Taxpayer Application**

If you already have an active Prorate and Fuel tax account with the Washington State Department of Licensing, click the "Create a new username" button.

**Create a new username**

If you do not have an active Prorate and Fuel Tax account with the Washington State Department of Licensing, click the "Set up a new online Prorate and Fuel Tax Account" button.

**Set up a new online Prorate and Fuel Tax Account**

[Check the status of your application](#)

**Already registered?**

Username  
janedoe

Password  
••••••••

Authentication Code

**Login**

[I forgot my username](#)  
[I forgot my password](#)

Enter your **Username**, **Password** and click on **Login**.

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The **Device not Recognized** dialogue box opens with a link to receive the authentication code required to login to your account. Click on **Send Authentication Email**.

**Device Not Recognized**

The device you are logging in with is not recognized.

In order to keep your information safe, the Department of Licensing requires additional security validation the first time you log into Taxpayer Access Point. An authentication code will be sent in order to verify your identity.

We will remember your device once this process is complete.

**Confirm Identification**

Select a method to receive your authentication code. Authentication codes can be sent via text message or email, depending on what information is on file.

**Send Authentication Email** An authentication code will be emailed to: janedoe@aaaatruckingservices.com

**Why is this required?**

- You are using a new device that has not logged into your account before
- You have switched browsers or deleted your cookies

Click on **Send Authentication Email**.

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You will receive an email with the **Authentication Code** that is required to login.



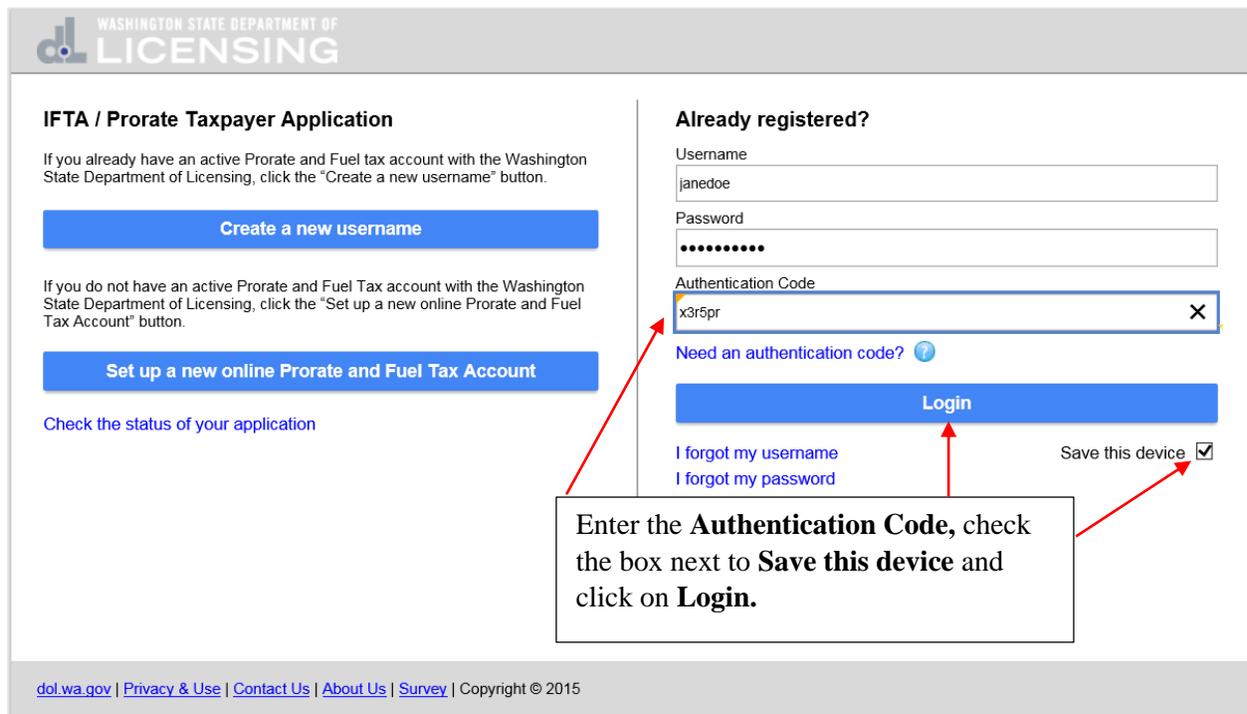
DoNotReply@gentax.com  
Testing: WLT Authentication Code requested for Jane Doe

To: Doe, Jane

Your authentication code is **x3r5pr** and is required for logon.  
[Click to login](#)

This is the **Authentication Code** you will need to enter in the **Authentication Code** field of the login screen.

Enter the **Authentication Code** you just received, check the box next to **Save this device** and click on **Login**.



WASHINGTON STATE DEPARTMENT OF LICENSING

**IFTA / Prorate Taxpayer Application**

If you already have an active Prorate and Fuel tax account with the Washington State Department of Licensing, click the "Create a new username" button.

[Create a new username](#)

If you do not have an active Prorate and Fuel Tax account with the Washington State Department of Licensing, click the "Set up a new online Prorate and Fuel Tax Account" button.

[Set up a new online Prorate and Fuel Tax Account](#)

[Check the status of your application](#)

**Already registered?**

Username: janedoe

Password: .....

Authentication Code: x3r5pr

[Need an authentication code?](#)

[Login](#)

[I forgot my username](#)

[I forgot my password](#)

Save this device

Enter the **Authentication Code**, check the box next to **Save this device** and click on **Login**.

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You're now at the home screen for your accounts. In the **I Want To** section, click on **View Profile**.

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**Menu** Log Off

Home

Back

**Navigation**

» My Accounts

**AAA TRUCKING SERVICES**

Federal Employer ID: 11-2345678  
 My Balance: \$0.00  
 Other Taxpayer Balance: \$31.12

**Names And Addresses**

Legal Name: AAA TRUCKING SERVICES  
 Physical Address: 2420 BRISTOL CT SW OLYMPIA WA 98512  
 Mailing Address: Add

**I Want To...**

- View Profile
- Make a Payment
- Request Good Standing Letter
- Register a New Account

**Accounts**<sup>1</sup> History<sup>0</sup> Messages<sup>7</sup> Letters<sup>0</sup>

My Accounts<sup>0</sup> Third Party Accounts<sup>1</sup>

**My Accounts** Hide History Filter

Account Id	Account Type	Name	Frequency	Address	Balance

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Click on **View Profile**.

In the **I Want To** section, click on **Request Access to Another User's Account**.

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**Menu** Log Off

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**Navigation**

My Accounts

» Profile

**Profile**

Web Name : Jane Doe  
 Phone 1 : +1 (360) 654-4566  
 Phone 2 : +1  
 Email : janedoe@aaaatruckingservices.com  
 Question : What city were you born in?  
 Auth Email : janedoe@aaaatruckingservices.com

**I Want To...**

- View Accounts
- Update Profile
- Change My Password
- Cancel My Online Access
- Add an Additional Username
- Grant Access to My Accounts
- Request Access to Another User's Account

**Manage Logons**

Logons Settings

**My Logons** Hide History Filter

Web Logon	Web Name	Master	Has Access	Active
janedoe	Jane Doe	Master	<input checked="" type="checkbox"/>	Active
jimdoe	JIM DOE	Account Manager	<input type="checkbox"/>	Active

2 Rows

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Click on **Request Access to Another User's Account**.

This is the request **Third Party Access** screen. You will need to know some specific information regarding the customer's account you want to receive access to. Click on **Next**.

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My Accounts

Profile

» Request for Third Party Access

Attachments Add

**Request for Third Party Access**

Use this process to request access to the account(s) of an existing Washington State Department of Licensing Prorate and Fuel Tax Services customer.

**When to Submit This Request**

- When requesting access to another customer's account(s).

**What You'll Need**

- Federal Employer Identification Number (FEIN), or Unified Business Identifier (UBI), or Social Security Number (SSN) of the account(s) you wish to access.
- Business specific information necessary to verify the account you wish to access.

Information Next

You will need to know some specific information regarding the customer's accounts you wish to receive access to. Click on **Next**.

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In the **Customer ID Type** field, click on the drop down arrow and select an **ID** type.

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» Request for Third Party Access

Attachments Add

**Enter Customer Information**

Enter the customer information for the account you wish to access.

Customer ID Type Unified Business ID (UBI) x

Customer ID

Back Enter Cus Cancel

Required  
Format: 999-999-999

Click on the drop down arrow and select an **ID** type.

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Click in the **Customer ID** field and enter the **ID** number. Click on **Next**.

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**Navigation**

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Profile

» Request for Third Party Access

**Attachments** Add

**Enter Customer Information**

Enter the customer information for the account you wish to access.

Customer ID Type Unified Business ID (UBI)

Customer ID 902-111-111

Back Enter Customer Information Next Cancel

Enter the **ID** number and click on **Next**.

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In the **Type of account you wish to access** field, click on the drop down arrow and select the **Account Type**.

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My Accounts

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» Request for Third Party Access

**Attachments** Add

**Verify Account Information**

Please enter the information of the account you would like to access. Once selected, you will need to enter some additional information about the account.

Type of account you wish to access IFTA

Account ID

Back Verify Account Cancel

Required  
Format: 9999999

Click on the drop down arrow and select the **Account Type**.

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Enter the **Account ID** number and more fields open that are required to be completed in order to verify the account information. In the **Type of fuel to check** field, click on the drop down arrow and select the fuel type.

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**Attachments** Add

**Verify Account Information**

Please enter the information of the account you would like to access. Once selected, you will need to enter some additional information about the account.

Type of account you wish to access IFTA

Account ID 0025217

Enter the **Account ID** number.

Enter one of the following pieces of information about a recent transaction on your IFTA account.

Most recent payment amount 0.00

Or

Tax due from most recently filed return 0.00

Or

Type of fuel to check Diesel

Total miles on most recently filed return

Total gallons on most recent return

Would you like to access an additional ac

Click on the drop down arrow and select the fuel type.

And

Back Verify Account Next Cancel

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Click in the **Total miles on most recently filed return** field and enter the **Total Miles**. Click in the **Total gallons on most recent return** field and enter the **Total Gallons**. **Would you like to access an additional account?** Click on **No** if you do not but click on **Yes** if you do. Click on **Yes** and click on **Next**.

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» Request for Third Party Access

**Attachments** Add

**Verify Account Information**

Please enter the information of the account you would like to access. Once selected, you will need to enter some additional information about the account.

Type of account you wish to access IFTA

Account ID 0025217

Enter one of the following pieces of information about a recent transaction on your IFTA account.

Most recent payment amount 0.00

Or

Tax due from most recently filed return 0.00

Or

Type of fuel to check Diesel

Total miles on most recently filed return 808

Total gallons on most recent return 140

Would you like to access an additional account? No Yes

Back Verify Account Next

Enter the **Total Miles** and the **Total Gallons**.  
Click on **Yes** and click on **Next**.

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In the **Type of account you wish to access** field, click on the drop down arrow and select the **Account Type**.

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» Request for Third Party Access

Attachments Add

**Verify Account Information**

Please enter the information of the account you would like to access. Once selected, you will need to enter some additional information about the account.

Type of account you wish to access Prorate

Account ID

Back Verify Additional Account Information Cancel

Required  
Format: 9999999-9999

Click on the drop down arrow and select the **Account Type**.

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Enter the **Account ID** number and more fields open that are required to be completed in order to verify the account information. Click in the **VIN from a registered vehicle** field and enter the **VIN**. Click in the **Purchase price of vehicle** field and enter the **Purchase Price**. Click on **Next**.

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My Accounts

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» Request for Third Party Access

Attachments Add

**Verify Account Information**

Please enter the information of the account you would like to access. Once selected, you will need to enter some additional information about the account.

Type of account you wish to access Prorate

Account ID 0025217-0101

Enter the following information for one of your vehicles recently registered to your Prorate account.

VIN from a registered vehicle 111111

Purchase price of vehicle 27,500.00

Back Verify Additional Account Information Next

Enter the **Account ID** number.

Enter the **VIN** and enter the **Purchase Price**. Click on **Next**.

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Conducting business on behalf of someone else requires a notarized **Power of Attorney (POA)** being on file from the customer you are requesting access to. If you do not have the **POA** form, click on the **DOL** link to obtain our form. If you already have a notarized **POA** from this customer, click on the **Add Attachment** link or **Add** in the **Attachments** section to add the completed and notarized **POA** to this request.

The screenshot shows the 'Review and Submit Request' page in the Washington State Department of Licensing system. The page title is 'Review and Submit Request'. Below the title, there is a message: 'Performing business actions on behalf of someone else requires you to provide a notarized Power of Attorney (POA). Click the link below or the "Add" link in the attachments panel to the left to attach your Power of Attorney.' Below this message, there is a red error message: 'You must add 1 more attachment(s)'. A yellow callout box labeled 'Attachment required' points to this message. Below the error message, there is a link: '<http://www.dol.wa.gov/forms/441021.pdf>'. A callout box labeled 'Click on this link if you need the POA form.' points to this link. Below the link, there are four buttons: 'Back', 'Review Request', 'Submit', and 'Cancel'. The 'Review Request' button is highlighted with a red border. On the left side of the page, there is a dark blue sidebar with a 'Menu' button and a 'Log Off' button. Below the sidebar, there is a section titled 'Attachments' with an 'Add' button. A callout box labeled 'Click on Add Attachment to attach the completed and notarized POA form.' points to the 'Add' button. Another callout box labeled 'Or click on Add to attach the completed and notarized POA form.' points to the 'Add' button in the 'Attachments' section. At the bottom of the page, there is a footer with links: 'dol.wa.gov | Privacy & Use | Contact Us | About Us | Survey | Copyright © 2015'.

The **Select a file to attach** dialogue box opens. In the **Type** field, **Power of Attorney** is entered. Click in the **Description** field and enter **Power of Attorney**. Click on the **Browse** button, search and attach the **Power of Attorney** document. Click on **Save**.

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» Request for Third Party Access

Attachments Add

Review and Submit Request

Performing business actions on behalf of someone else requires you to provide a notarized Power of Attorney (POA). Click the link below or the "Add" link in the attachments panel to the left to attach your Power of Attorney.

Add Attachment You must add 1 more attachment(s)

If you do not have a Power of Attorney (POA) at this time, click on the link below to be redirected to the Washington IFTA Power of attorney form.

<http://www.dol.wa.gov/forms/441021.pdf>

Back Review Request Submit

Select a file to attach

Type Power of Attorney

Description Power of Attorney

H:\PRFT Project\Tap\Training\Audit\Power of Attorney.pdf Browse...

Save Cancel

Click on Save.

The **Type** field defaults to **Power of Attorney**. Click in the **Description** field and enter **Power of Attorney**. Click on the **Browse** button, search and attach the **Power of Attorney** document.

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The **Power of Attorney** document has been attached in the **Attachments** section. Click on **Submit**.

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» Request for Third Party Access

Attachments Add

Review and Submit Request

Performing business actions on behalf of someone else requires you to provide a notarized Power of Attorney (POA). Click the link below or the "Add" link in the attachments panel to the left to attach your Power of Attorney.

Add Attachment ?

If you do not have a Power of Attorney (POA) at this time, click on the link below to be redirected to the Washington IFTA Power of attorney form.

<http://www.dol.wa.gov/forms/441021.pdf>

Back Review Request Submit Cancel

Power of Attorney.pdf x

Power of Attorney

The **Power of Attorney** document has been attached. Click on **Submit**.

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Are you sure you want to submit this request? Enter your **Password** and click on **Ok**.

The screenshot shows the 'Review and Submit Request' page. The page title is 'WASHINGTON STATE DEPARTMENT OF LICENSING'. The main content area contains the following text: 'Performing business actions on behalf of someone else requires you to provide a notarized Power of Attorney (POA). Click the link below or the "Add" link in the attachments panel to the left to attach your Power of Attorney.' Below this is an 'Add Attachment' button. Further down, it says: 'If you do not have a Power of Attorney (POA) at this time, click on the link below to be redirected to the Washington IFTA Power of attorney form. <http://www.dol.wa.gov/forms/441021.pdf>'. At the bottom of the main content area are three buttons: 'Back', 'Review Request', and 'Submit'. On the right side, there is a 'Cancel' button. A modal dialog box is open in the center, with the following text: 'Are you sure you want to submit this request? Your password will act as your signature. Password: [password field]. Below the password field are 'OK' and 'Cancel' buttons. A callout box on the right points to the password field with the text: 'Enter your **Password** and click on **Ok**.' The footer contains links for 'dol.wa.gov', 'Privacy & Use', 'Contact Us', 'About Us', 'Survey', and 'Copyright © 2015'.

This is the confirmation that your request has been submitted. It includes the **Confirmation Number** and that a copy of this confirmation message has been sent to your email address. Click on **Print** if you want a copy for your records and click on **Ok** to finish.

The screenshot shows the confirmation page. The page title is 'WASHINGTON STATE DEPARTMENT OF LICENSING'. The main content area contains the following text: 'Your request has been submitted. Your confirmation number is 0-595-197-952. A copy of this confirmation message has been sent to your email address. To ensure your emails from Washington State Department of Licensing are received, please set your email filter to allow messages from [dol.wa.gov](mailto:dol.wa.gov)'. Below this text are two buttons: 'OK' and 'Print'. A callout box on the right points to the 'Print' button with the text: 'Click on **Print** if you want a copy for your records and click on **Ok** to finish.' The footer contains links for 'dol.wa.gov', 'Privacy & Use', 'Contact Us', 'About Us', 'Survey', and 'Copyright © 2015'.

You are returned to the **Profile** screen. Click on **Home**.

WASHINGTON STATE DEPARTMENT OF LICENSING

**Menu** Log Off

Home

Back

**Navigation**

My Accounts

» Profile

**Profile**

Web Name : Jane Doe  
Phone 1 : +1 (360) 654-4566  
Phone 2 : +1  
Email : janedoe@aaatruckingservices.com  
Question : What city were you born in?  
Auth Email : janedoe@aaatruckingservices.com

**I Want To...**

[View Accounts](#)  
[Update Profile](#)  
[Change My Password](#)  
[Cancel My Online Access](#)  
[Add an Additional Username](#)  
[Grant Access to My Accounts](#)  
[Request Access to Another User's Account](#)

**Manage Logons**

Logons Settings

**My Logons** Hide History Filter

Web Logon	Web Name		Has Access	
janedoe	Jane Doe	Master	<input checked="" type="checkbox"/>	Active
jimdoe	JIM DOE	Account Manager	<input type="checkbox"/>	Active

2 Rows

Click on **Home** to be returned to the **Home** screen.

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Click on **History** if you want to view the pending request for third party access.

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**Menu** Log Off

Home

Back

**Navigation**

» My Accounts

**AAA TRUCKING SERVICES**

Federal Employer ID 11-2345678  
My Balance \$0.00

**Names And Addresses**

Legal Name AAA TRUCKING SERVICES  
Physical Address 2420 BRISTOL CT SW OLYMPIA WA 98  
Mailing Address Add

**I Want To...**

[View Profile](#)  
[Request Good Standing Letter](#)  
[Register a New Account](#)

Accounts<sup>0</sup> **History<sup>1</sup>** Messages<sup>3</sup> Letters<sup>0</sup>

Waiting to be Processed<sup>1</sup> All Requests

**Requests waiting to be processed** Filter

Confirmation #	Submitted	Account Id	Account Type	Period	Title	Status	Logon
0-595-197-952	02-Oct-2015				Request for Third Party Pending		

Click on **History** if you want to view the pending request for third party access.

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This completes the **How to Add Accounts to a Service Agent** tutorial.