Web Portal

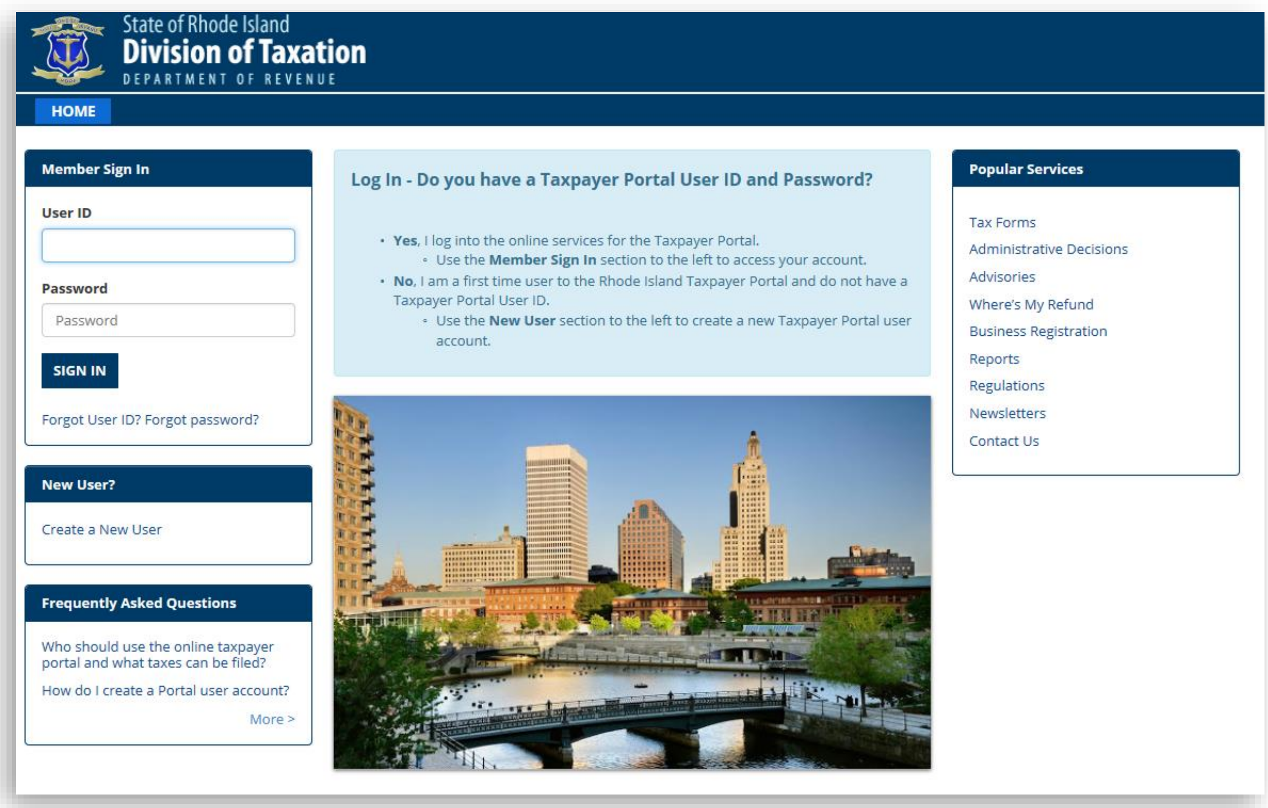
User Guide

Table of Contents

Getting Around

Portal Home Page

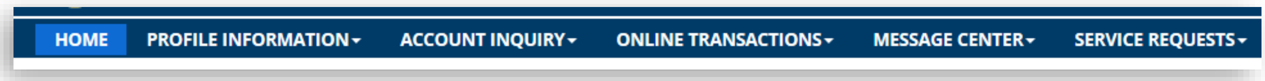
1. The home tab is the public site for the portal and will contain general information that does not require you to log in. Frequently asked questions are available on the left side of the page. Users can also select an item from the *"Popular Services"* box on the right side of the page. The news section in the center of the page will provide news or informational updates. A non-registered user who wants to create an account can create an account using the "*New User"* portlet on the left side of the page.
2. Registered business portal users can log in to their account in the "*Member Sign"* portlet on the left side of the page.



Using the Main Menu Registered Portal User

The Main Menu is displayed across the top of every window. It contains options that help you navigate and perform actions within the system. These options vary depending on the page that is displayed and if you are a registered portal user.

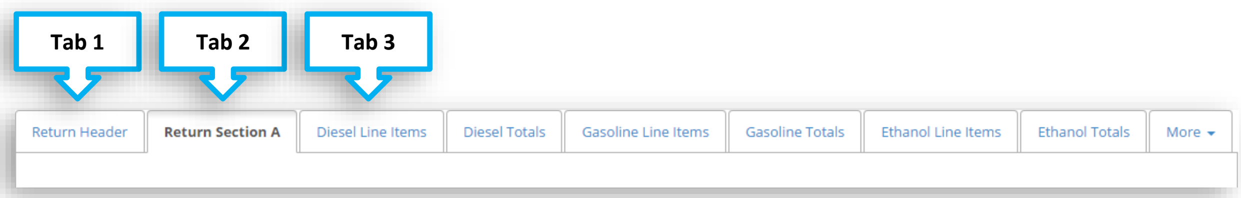
To select an option from the menu, select the appropriate topic and click the desired hyperlink in the drop-down list.



Using Tabs

Some sections contain tabs that offer multiple view options. When you click on a tab, the section displays the information described by the tab label.

For example, you may see tabs (return header, return, and attachments) as part of filing a return. Each section of the return may be grouped into separate tabs.



Using Keyboard Shortcuts

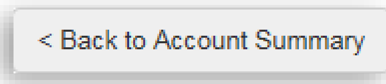
If you prefer to use the keyboard rather than the mouse, there are several keyboard shortcuts available.

Tab key – Move forward from the current field to the next one in the window.

Shift + **Tab** – Move to the previous field in the window.

Enter the first letter – When you are selecting an item from a drop-down menu, type the first letter of the item you want. The system will automatically select the first entry in the menu that begins with that letter.

Alt + **Left** arrow key – Return to the last window you visited. You can press these keys multiple times to move several windows back through the windows you have visited. (This key combination performs the same action as the **Back** option in the menu bar).
You will also see a button with the name of the previous page on some pages. Selecting this will bring you back to the previous page.

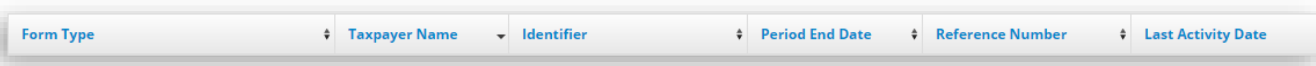


Ctrl + **Z** – If you delete the contents of a field by accident, press these two keys at the same time to restore the deleted text.

Sorting

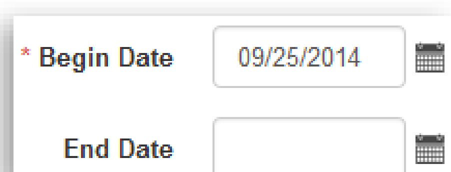
Certain sections organize lists beneath column headers. Lists containing column headers can be sorted and arranged to help you in organizing the list information in a useful way.

To sort the items in a list by a particular column, click that column header name.



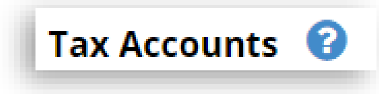
Required Fields

The required fields for a page will have a red * to the left of the field name. You will not be able to complete a transaction until the data for all required fields is entered correctly.



Help Topics

Select the icon to view more information on that topic.



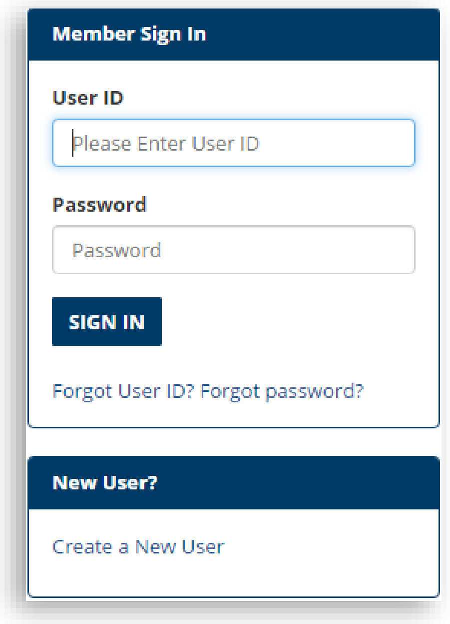
Security and Access

Create a Portal Account

You can create a portal account for secure access.

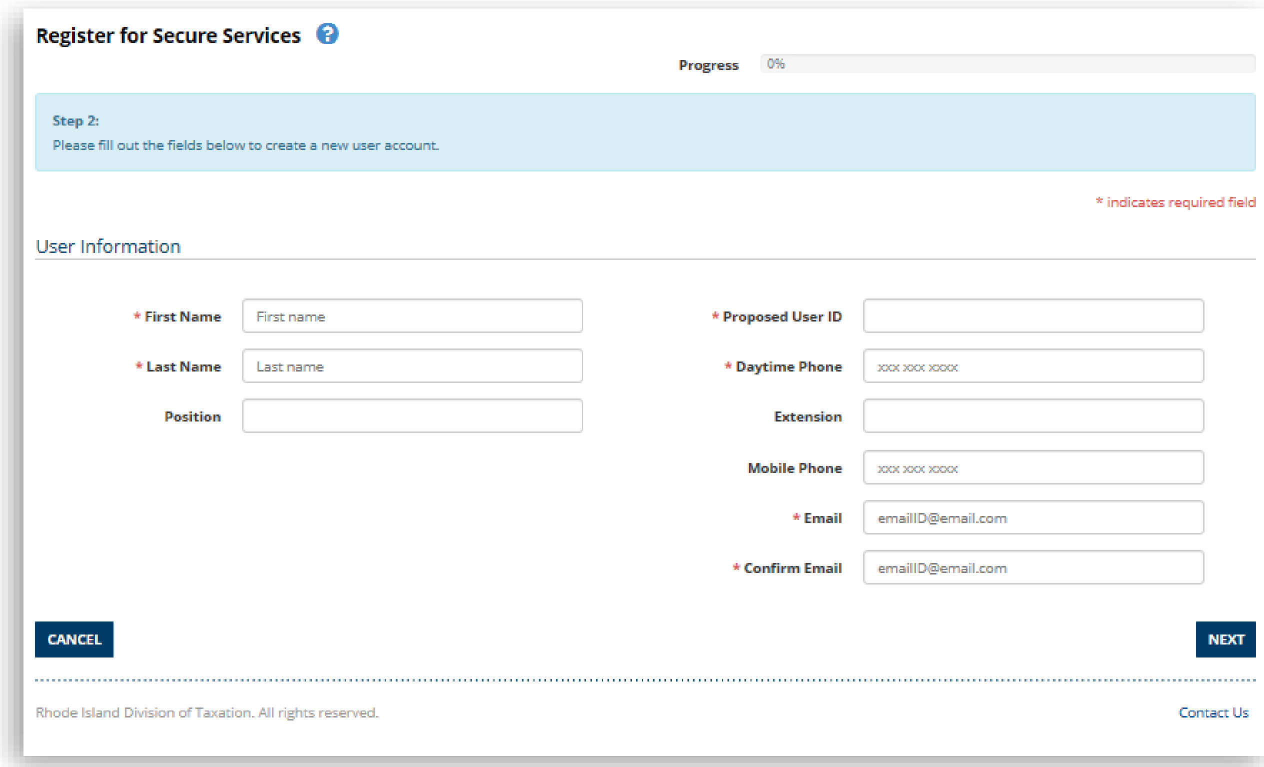
What do I do?

1. Select the **Create a New User** hyperlink from the Home page.

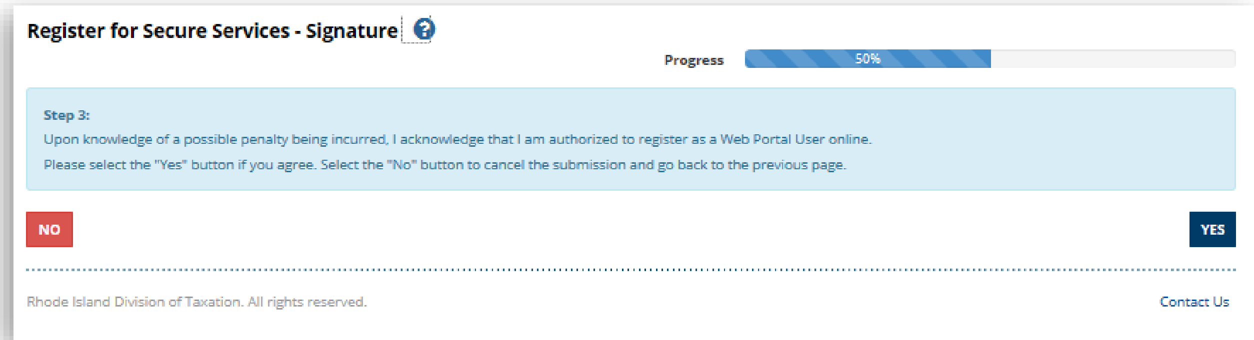


2. The Agreement Notice is displayed; check the box for **I Agree**.

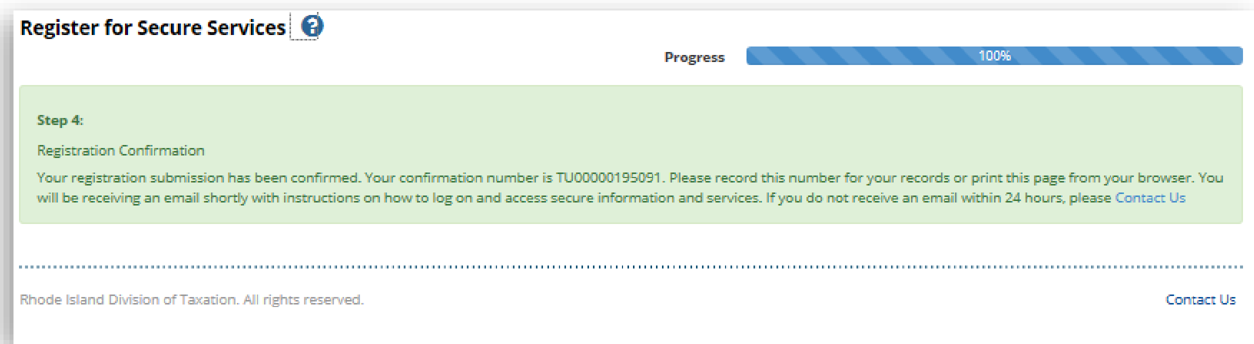
3. Select the **Next** button.
4. Enter the required information to set-up the user.
5. Select the **Next** button.


Register for Secure Services
Progress
0%
Step 2:
Please fill out the fields below to create a new user account.
* indicates required field
User Information
* First Name
First name
* Last Name
Last name
Position
* Proposed User ID
* Daytime Phone
xxx xxx xxxx
Extension
Mobile Phone
xxx xxx xxxx
* Email
emailID@email.com
* Confirm Email
emailID@email.com
CANCEL
NEXT
Rhode Island Division of Taxation. All rights reserved.
Contact Us

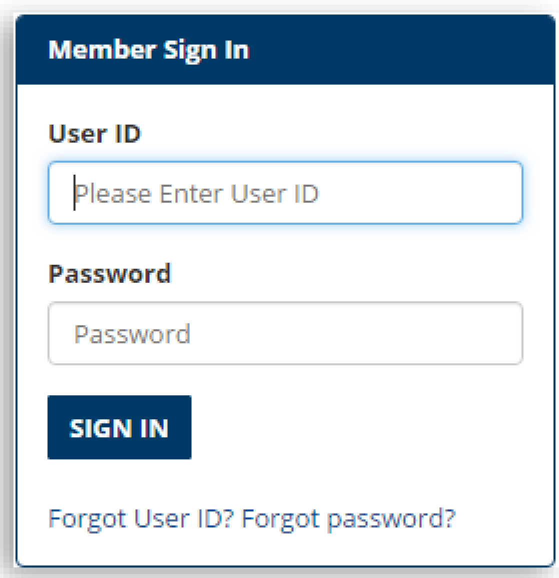
6. Confirm that you want to register for secure services.



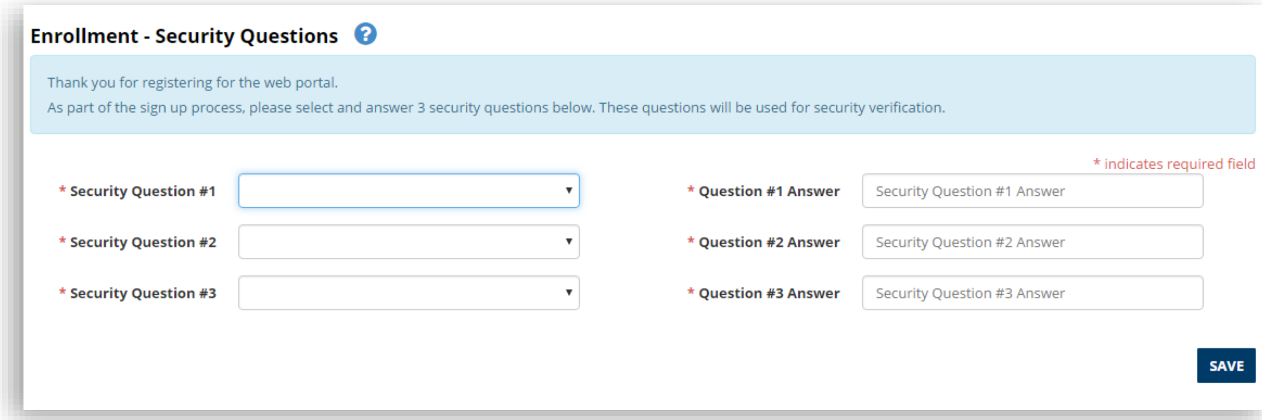
7. You will receive a confirmation message and an email will sent with the user name and password.



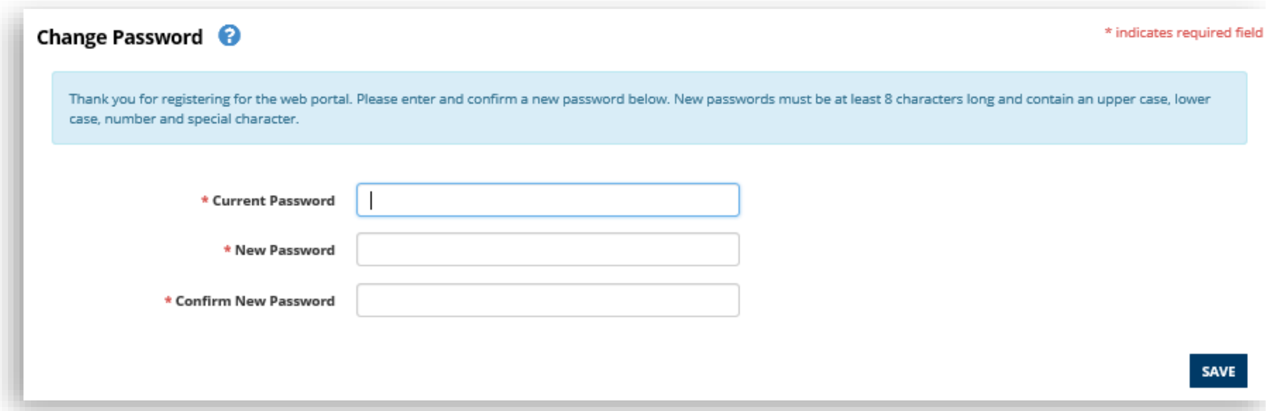
8. When you receive the email, log-in to the portal on the home page using your user name and temporary password.



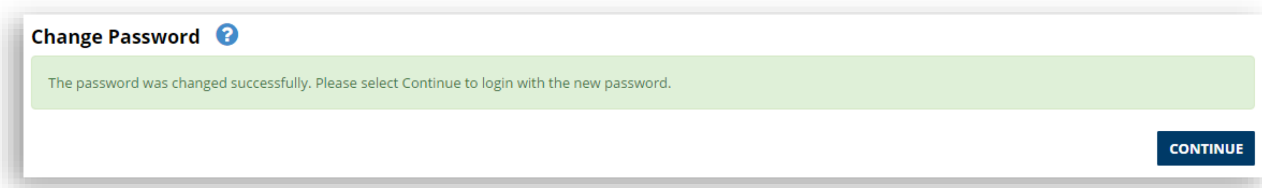
9. Choose your Security Questions and provide an answer (This will help you to unlock your account if you forget your portal password or forget your User Id). When finished, select the **Save** button**.**



10. Enter your temporary password and create a new password and select the **Save** button**.**



11. The portal displays a confirmation page.



12. You can now log in using your username and new password.

Portal User Types

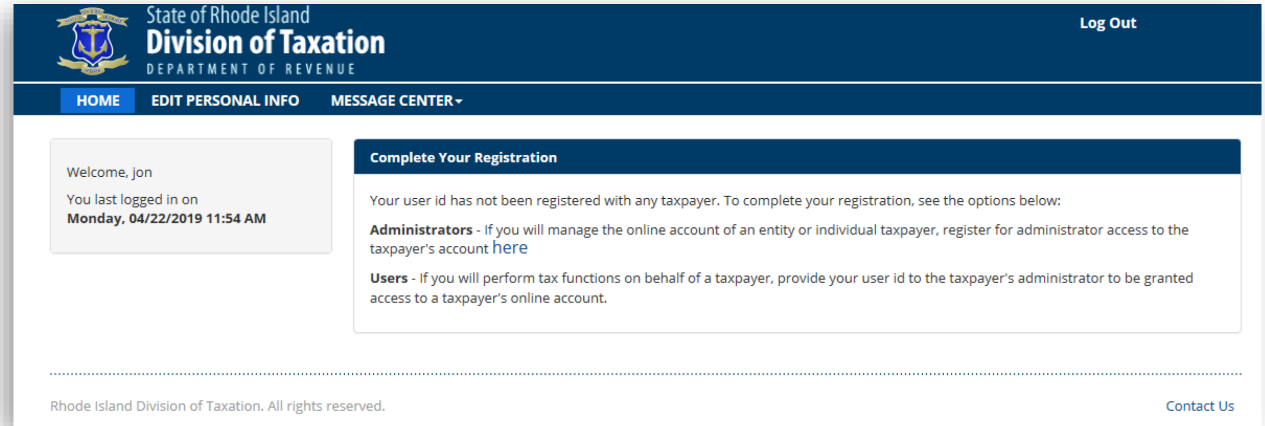
1. **Taxpayer Administrator** – This user has full access to perform the available actions on the Web Portal for a Taxpayer, as well as managing access to Authorized Users for the Entity.
2. **Taxpayer Authorized User** – This user has the access as delegated to them by an Administrator for performing actions on the Web Portal for the Entity.

Complete Administrator Registration

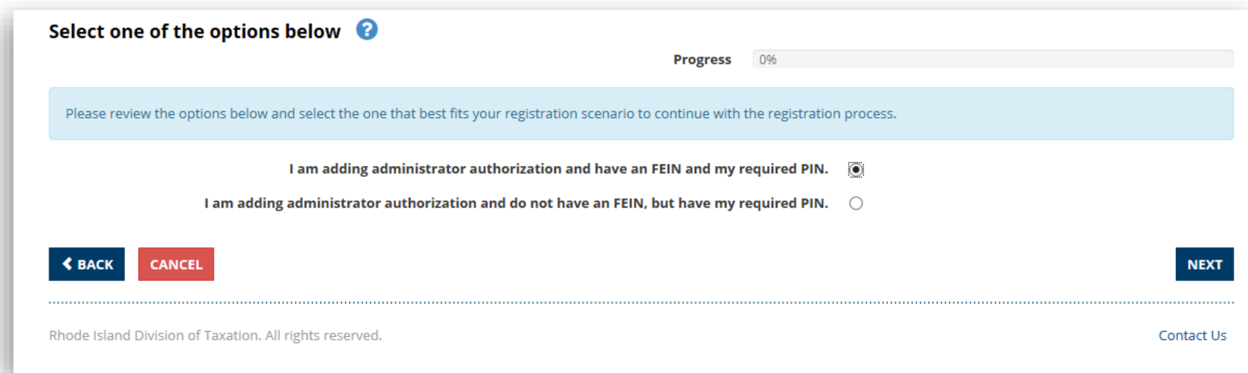
You can complete your administrator registration by adding a taxpayer to your account.

What do I do?

1. Log-in to the portal using your username and password.
2. Select the **here** link at the end of the sentence about Administrators**.**

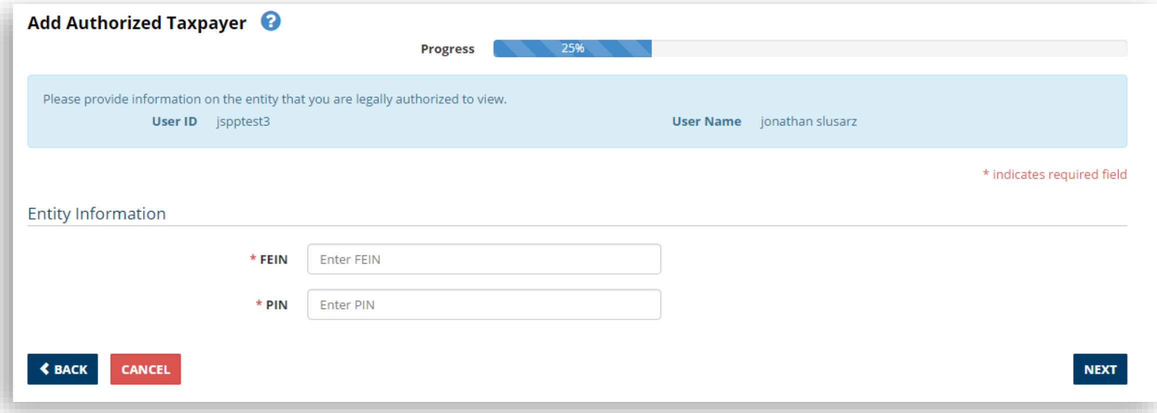


3. Select an option to add Administrator Authorization to your account and select the **Next** button.

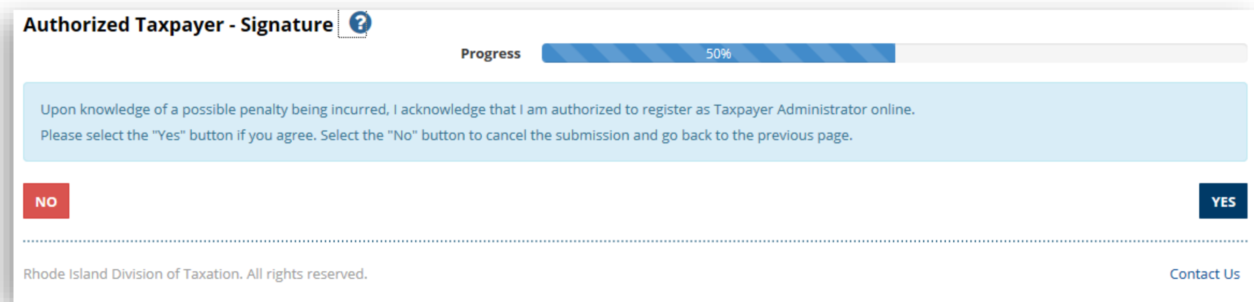


4. Provide the information for the option you selected.

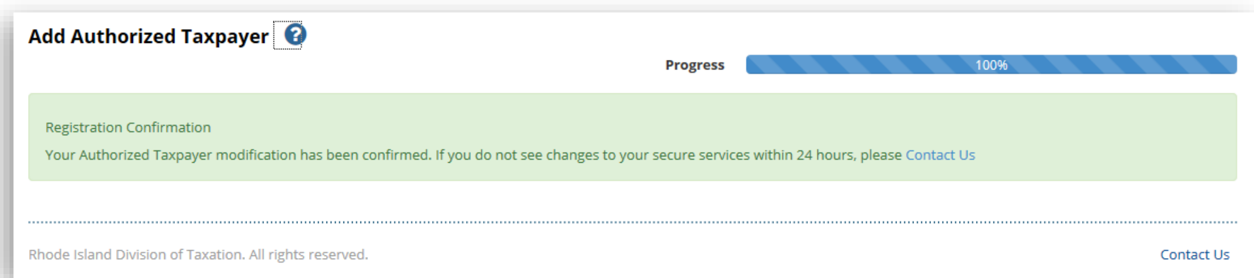
For this example, the option "I am adding administrator authorization and have an FEIN and my required PIN" was chosen.



5. Select the **Yes** button to confirm.



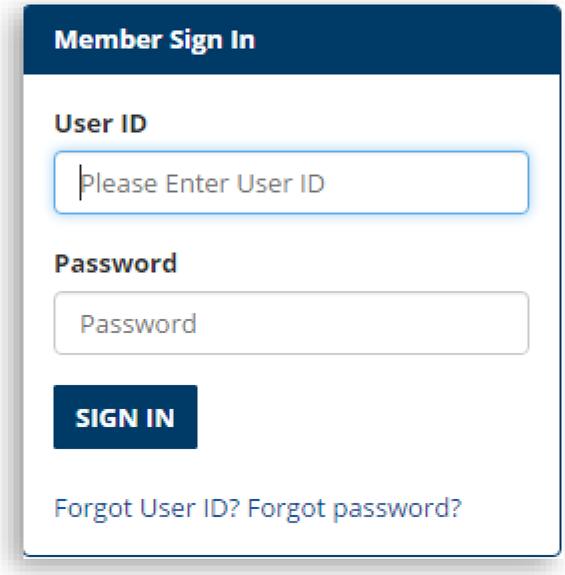
6. A confirmation page will display.



Logging In

What do I do?

1. In the Member Sign In section, enter your username and password into the appropriate fields.
2. Select the **Sign In** button.

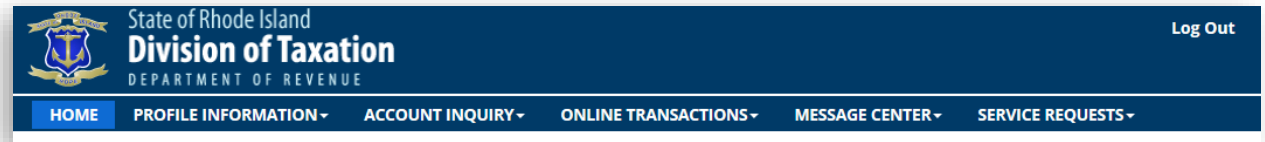


Logging Out

Logging out takes you back to the log on screen where you can log on again, if necessary, or perform other tasks on the public site such as, but not limited to, review news items or check the status of your refund.

What do I do?

You can log out by clicking the **Log Out** hyperlink in the upper right-hand corner of the screen.

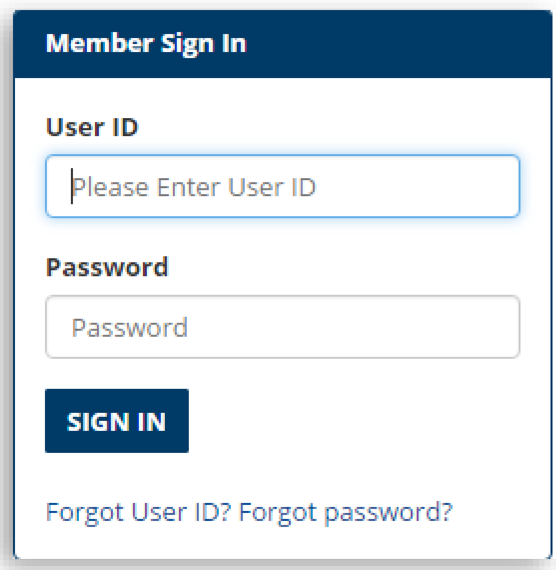


Forgot Password

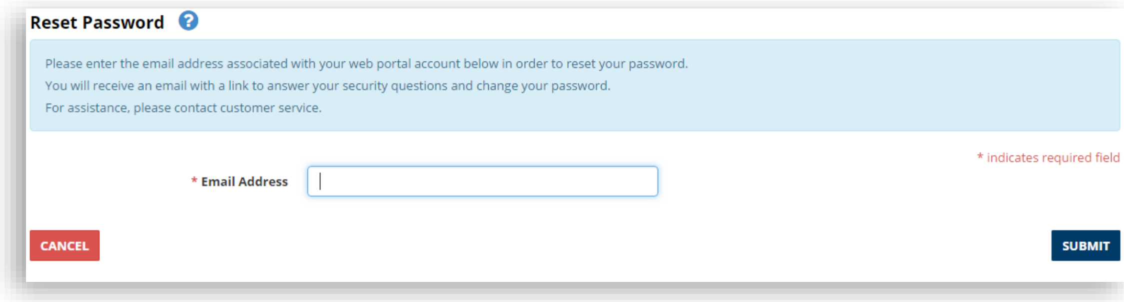
If you forget your password, you are able to reset your password online.

What do I do?

1. In the Member Sign In section, select the **Forgot password?** hyperlink.

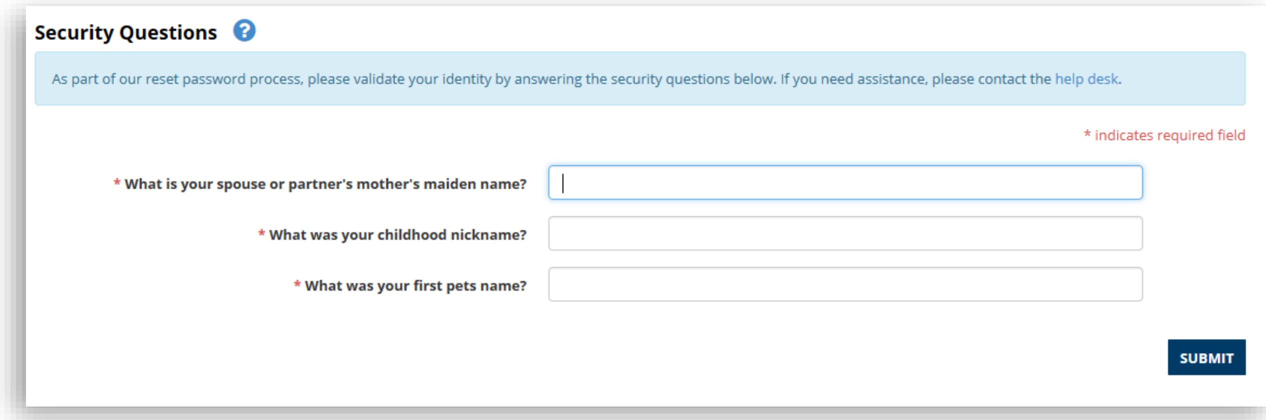


2. Enter the email address associated with your account.

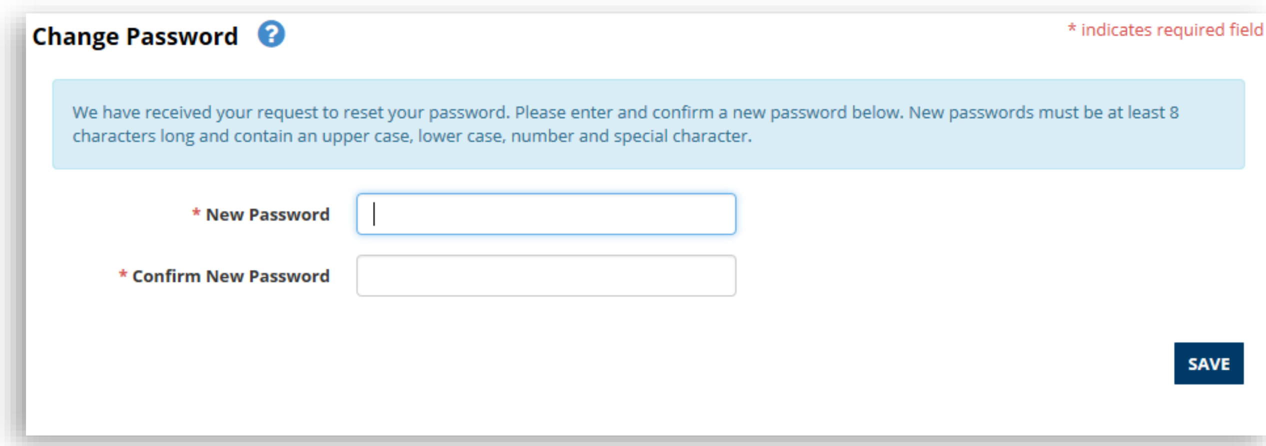


3. Select the **Submit** button.
4. You will receive an email to reset your password, select the link in the email.

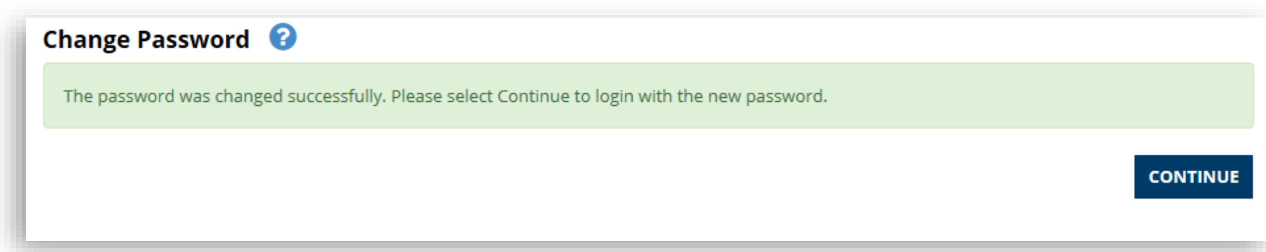
5. Answer your security questions.



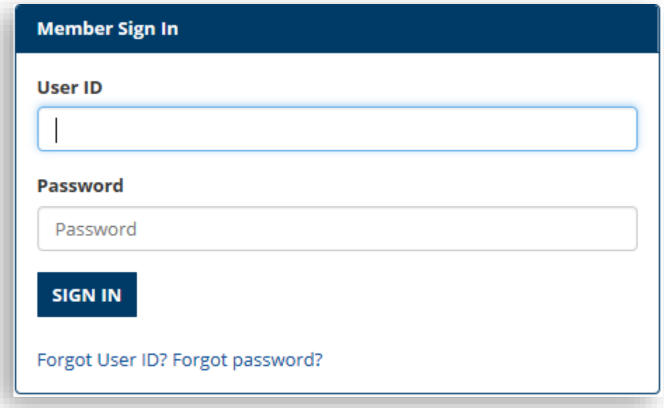
6. Select the **Submit** button.
7. Enter your new password and select the **Save** button.



8. On the confirmation page, select the **Continue** button.



9. Log into the portal using your new password.

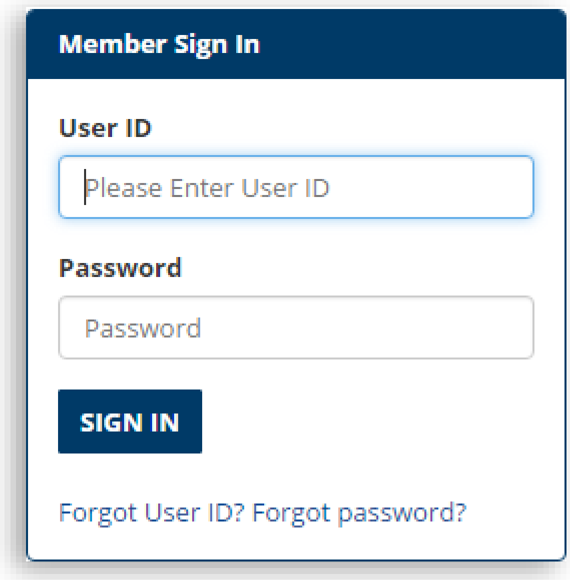


Forgot User ID

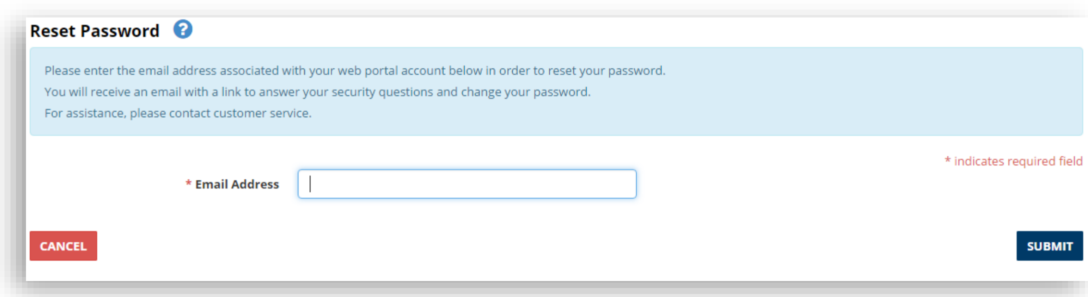
If you forget your user ID, you are able to get your user ID online. You will be required to reset your password at the same time.

What do I do?

1. In the Member Sign In section, select the **Forgot User ID?** hyperlink.

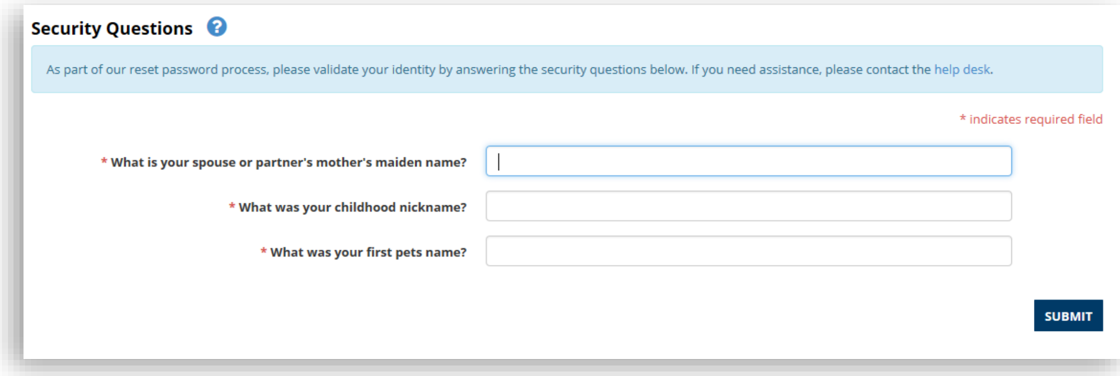


2. Enter the email address associated with your account.

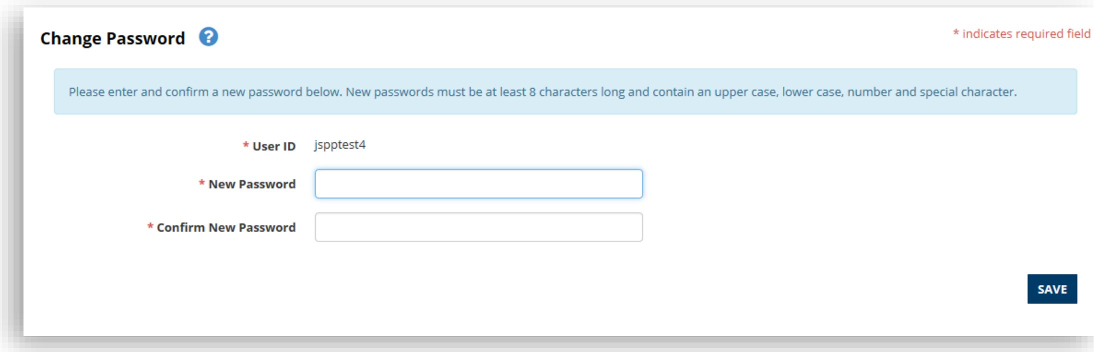


3. Select the **Submit** button.
4. You will receive an email to reset your password, select the link in the email.

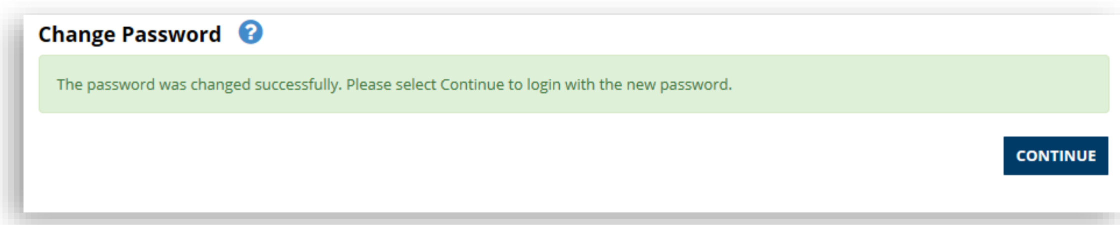
5. Answer your security questions.
6. Select the **Submit** button.



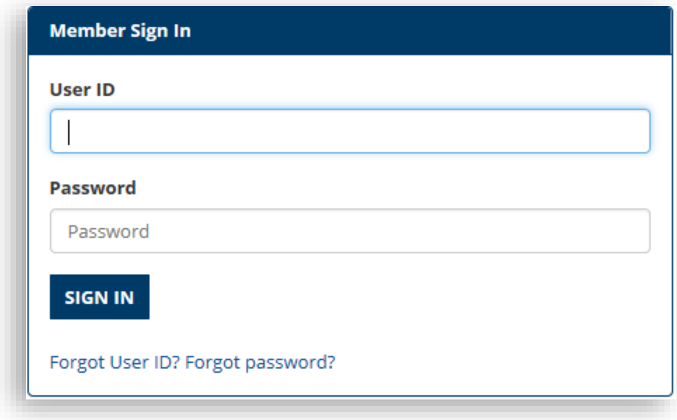
7. Your User ID will be displayed. You will need to change your password at this time. Enter your new password and select the **Save** button.



8. On the confirmation page, select the **Continue** button.



9. Log into the portal using your new password.



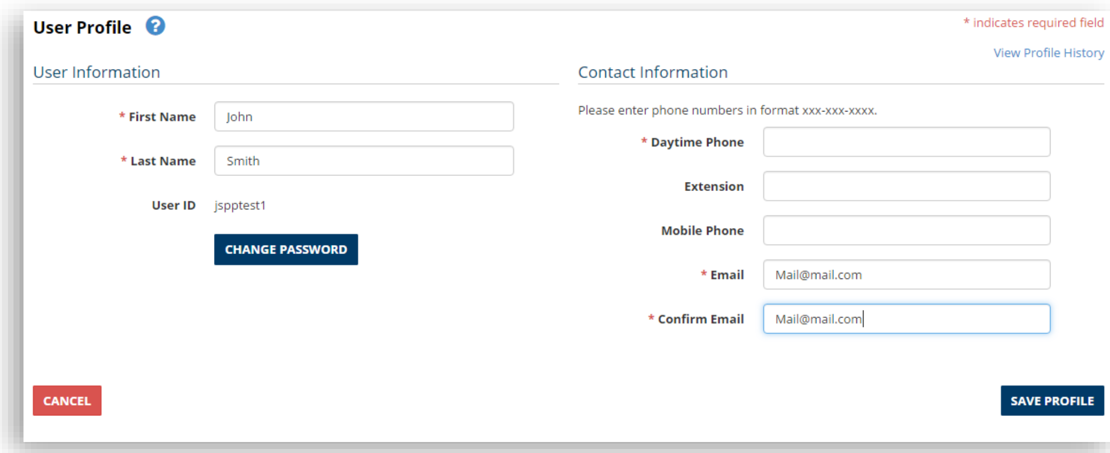
My Profile

Editing Profiles

There may be a time when you need to update information on your User Profile (e.g. phone number or email address).

What do I do?

1. From any page, select **Profile Information** from the main menu.
2. Select the **User Profile** in the drop-down list.
3. Update the information as needed.
4. Select the **Save Profile** button.



Manage Users

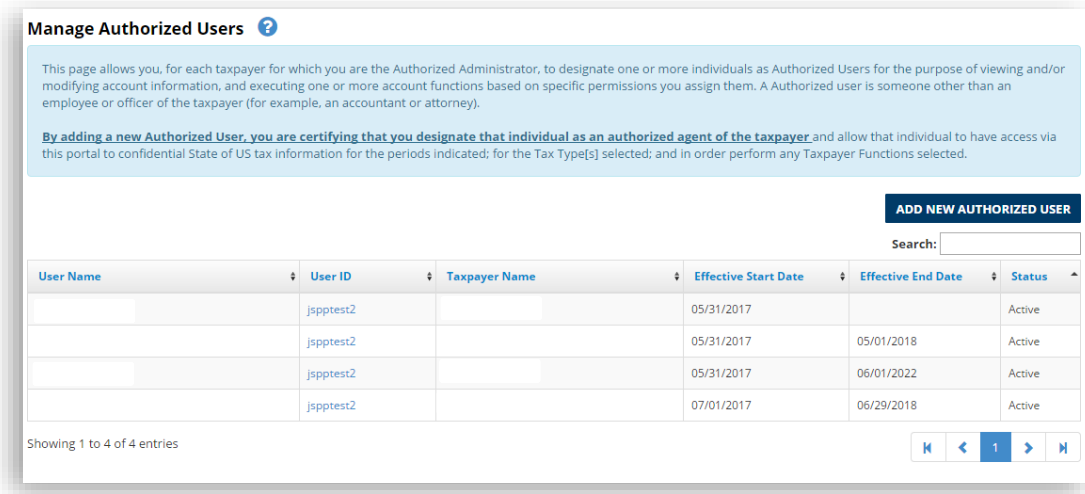
Manage Authorized Users

As an Authorized Administrator User you can designate Authorized Users within and outside (e.g. an accountant) your organization to perform specific functions on your behalf for your taxpayers. You can also choose what functions the Authorized User is allowed to perform on your behalf or revoke privileges previously granted.

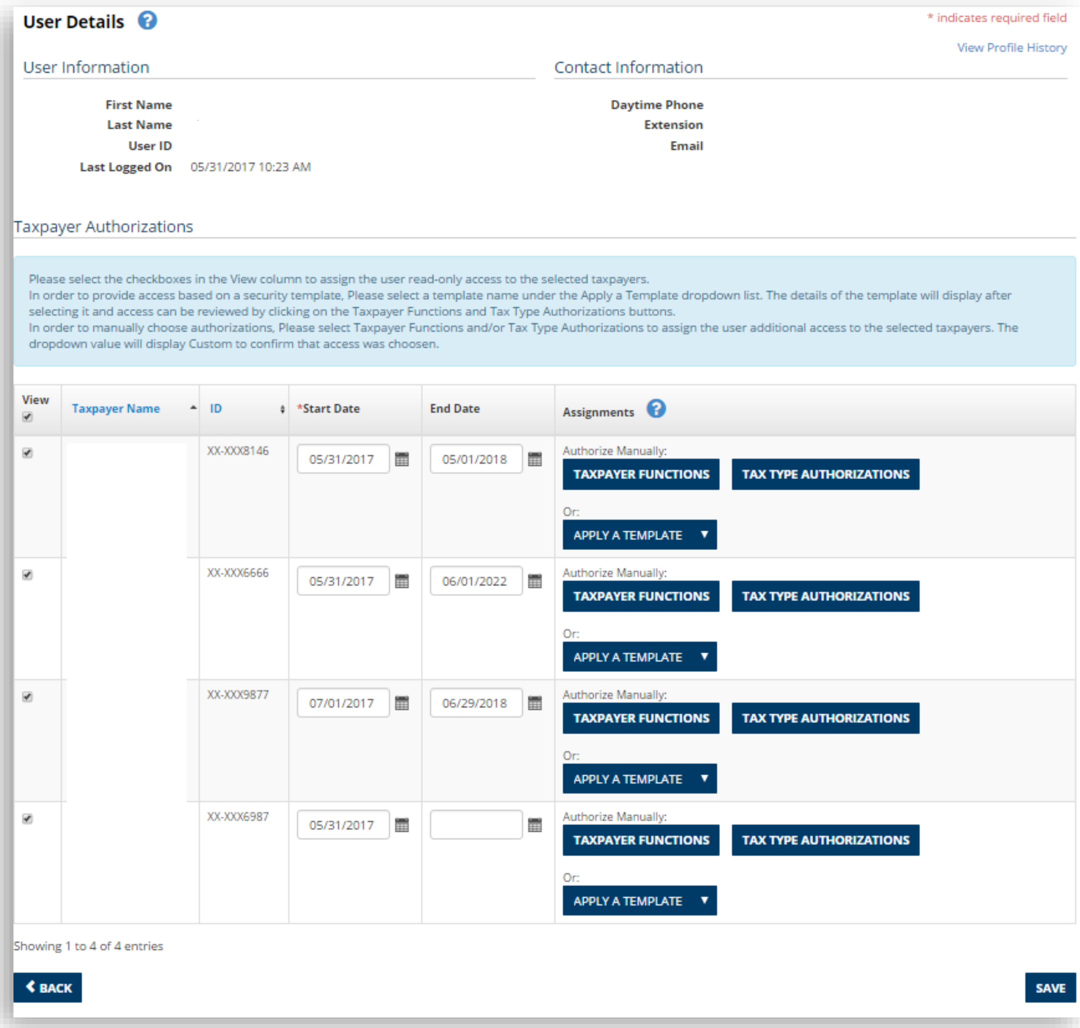
What do I do?

1. Log in to your secure web portal account.
2. Select **Manage Authorized Users** under **Profile Information** from the main menu.
3. Select the **User ID** for an Authorized Users already in the system.

For new Authorized Users, proceed to step 15.

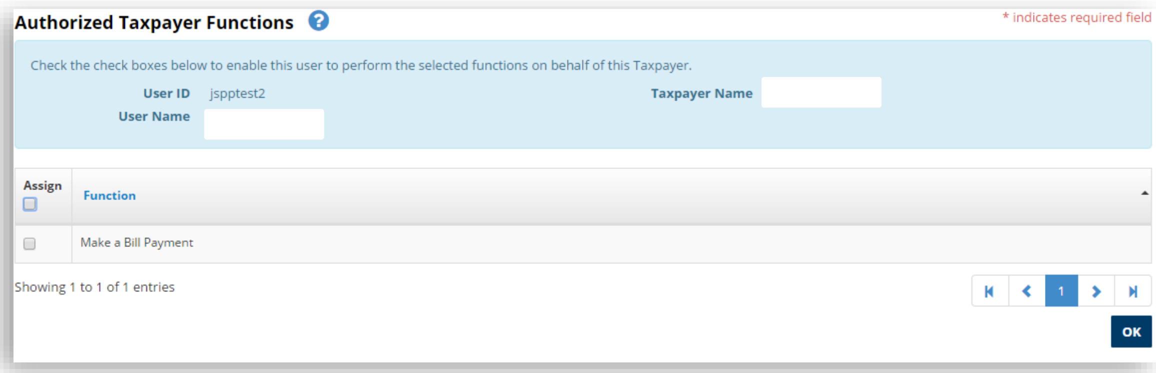


4. Enter the delegation effective start and end date (optional) for the delegated business user.

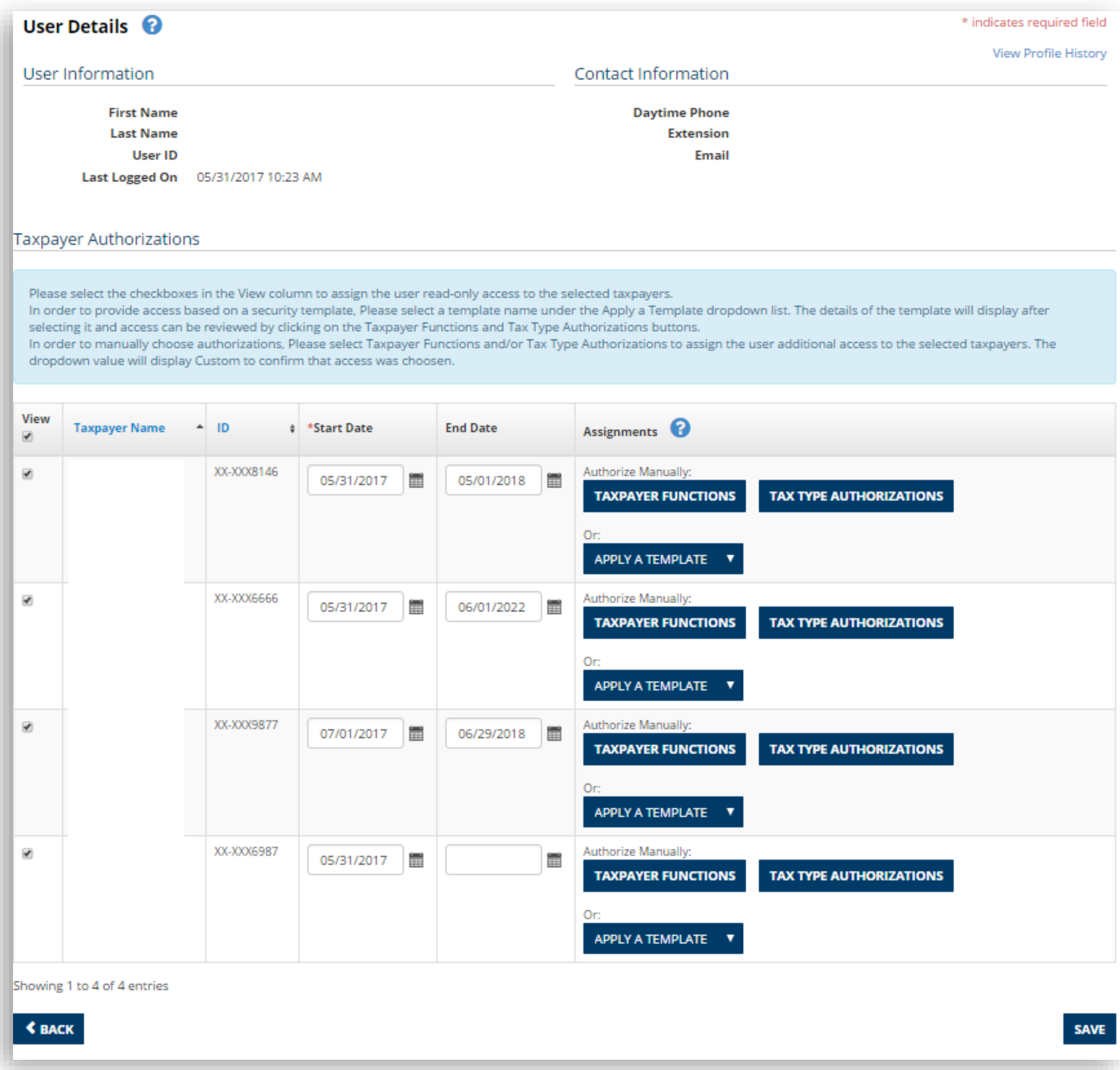


5. Select the **View** box(es) next to the business name(s) to give the business user view only access.
6. Select the **Taxpayer Functions** button to delegate taxpayer functions for each of your taxpayers to the user.

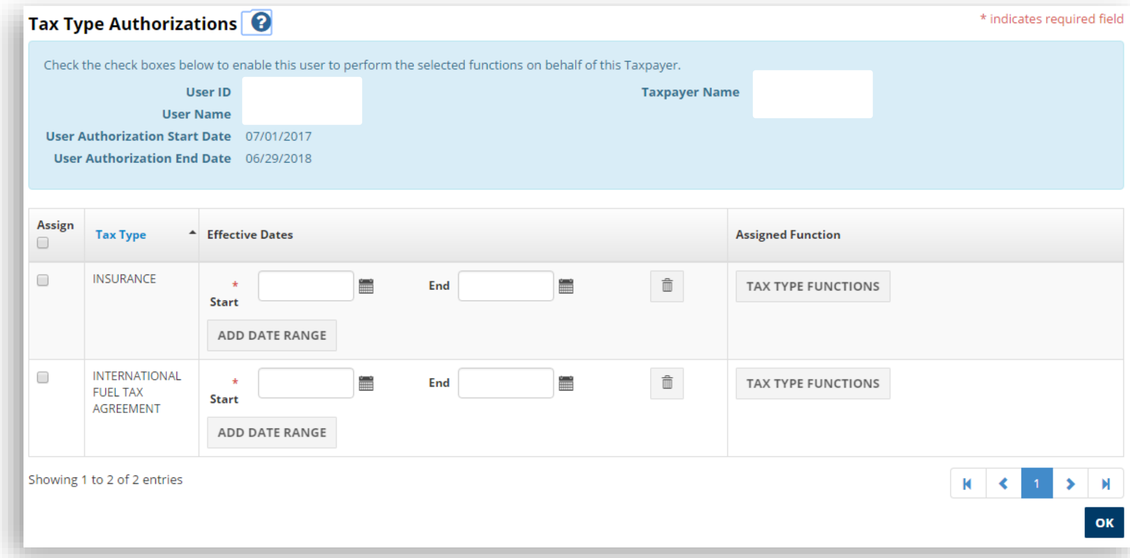
7. Select the **Assign** box for each function you want to delegate to the authorized user.



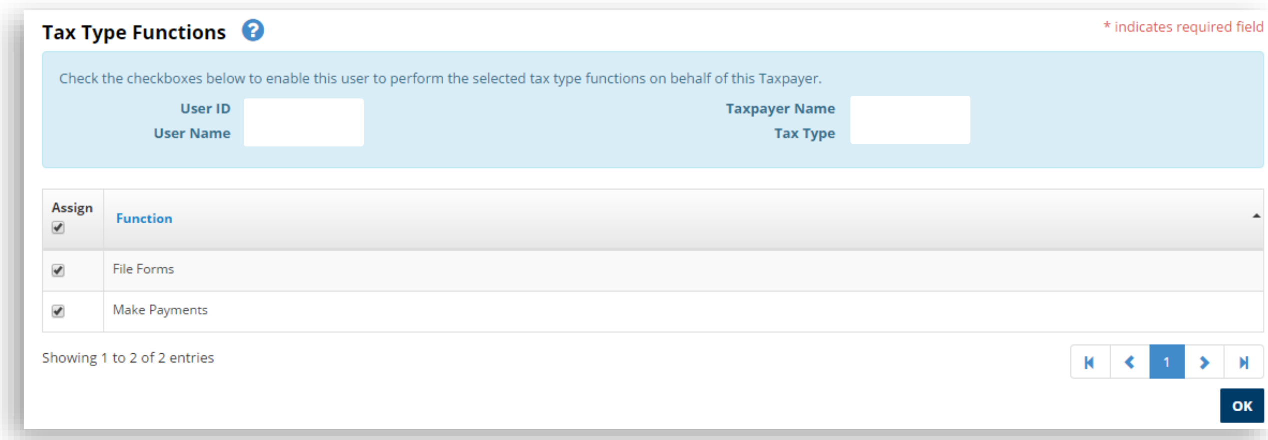
8. Select the **OK** button.
9. To assign Tax Type Authorizations for each of your taxpayers to your authorized users, select the **Tax Type Authorizations** button.



10. Select the **Assign** box and enter a start date for each tax type you want to delegate to the authorized user.

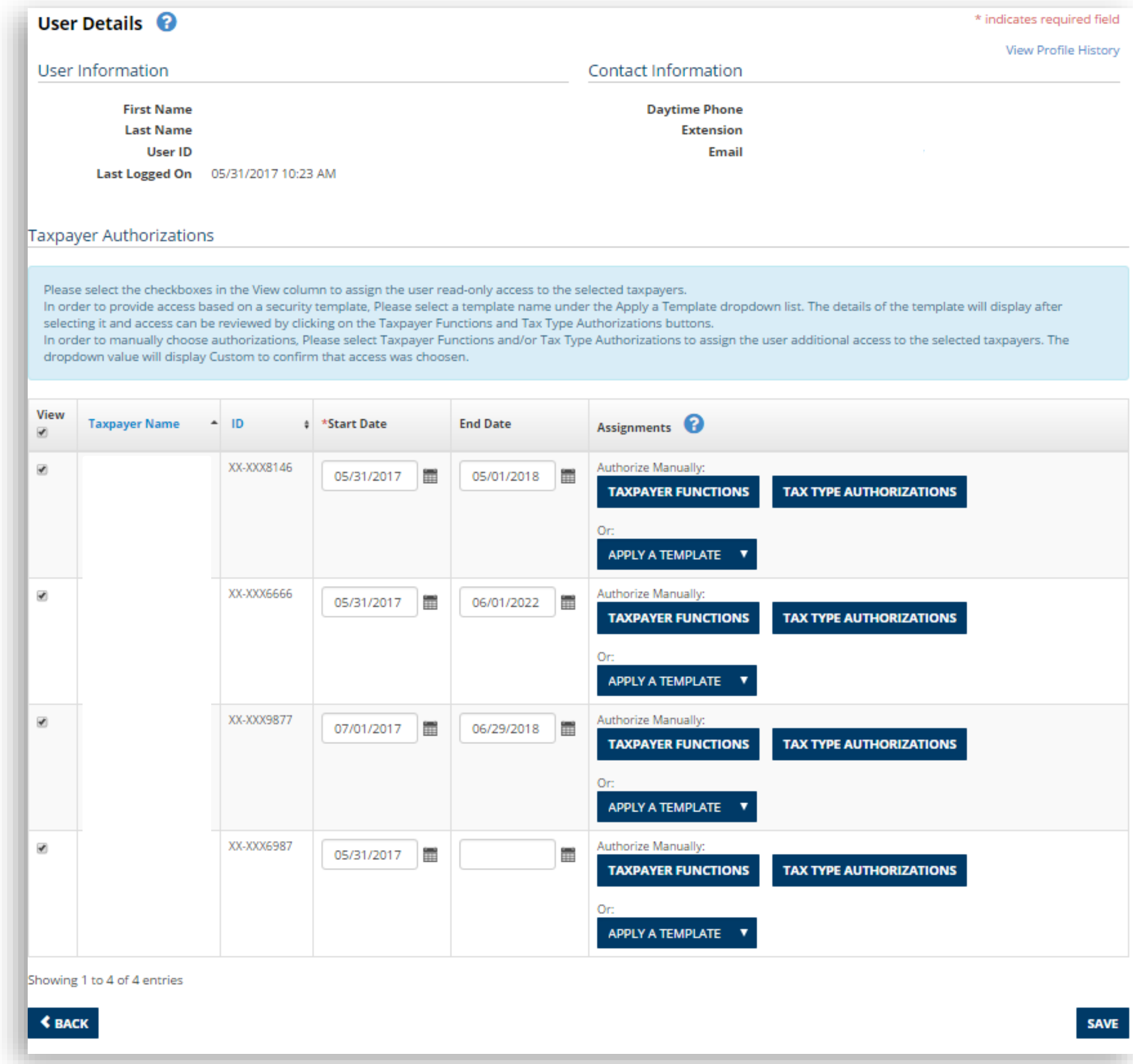


11. Select the **Tax Type Functions** button to delegate functions for the tax types to the authorized user.



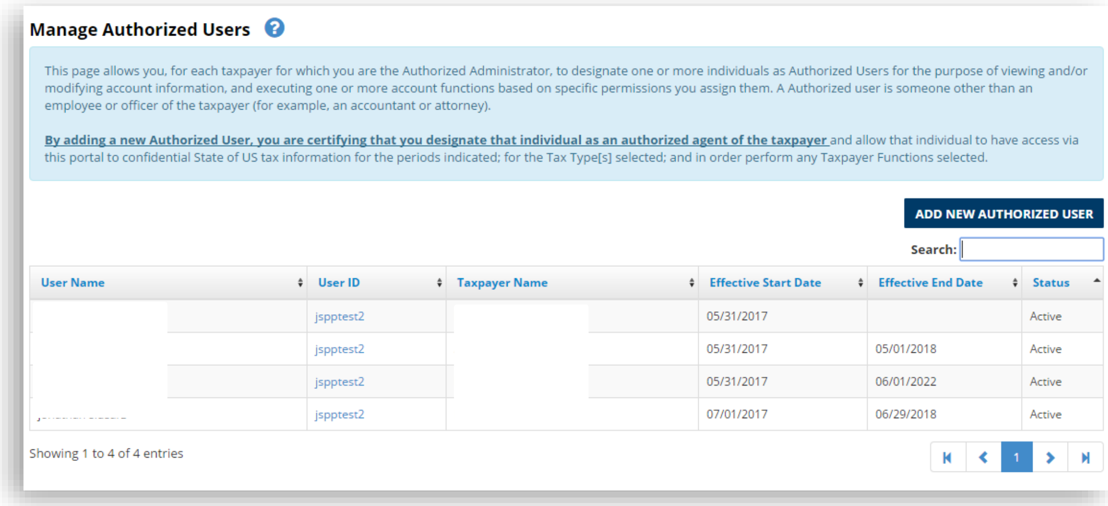
12. Select the **OK** button.

13. You can skip the above steps by choosing to **Apply Template**. For the version of the portal you are using, select full access to provide the Authorized User full access to a taxpayer. Do this for each taxpayer you want the Authorized User to have full access.

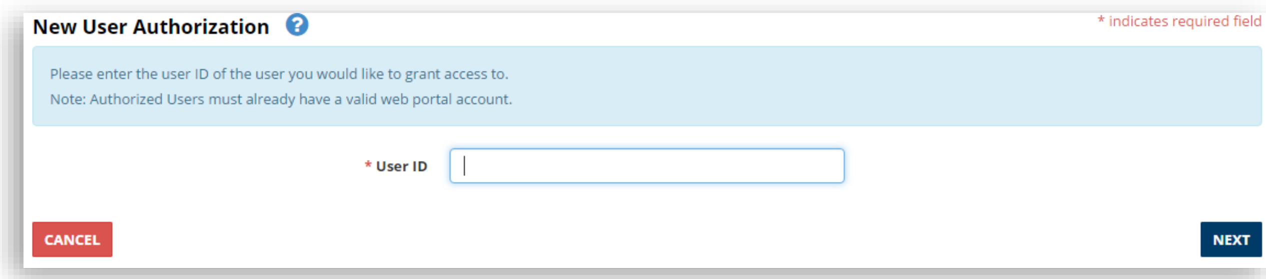


14. Select the **Save** button.

15. To add a New Authorized User to your account, select the **Add New Authorized User** button.



16. Enter the user ID for the user you are adding to the account (the user needs to have setup a portal account and provide you with their user name).



17. Perform steps 4-12.

My Returns

File a Return

You can file a return for the different taxpayers associated with your portal account.

What do I do?

1. Select **File a Form** from the main menu under **Online Transactions**.

To File a New Return you must have a registered account and have a valid user ID and password. If you are filing a return on behalf of another user, that user will need to authorize you to file a return.

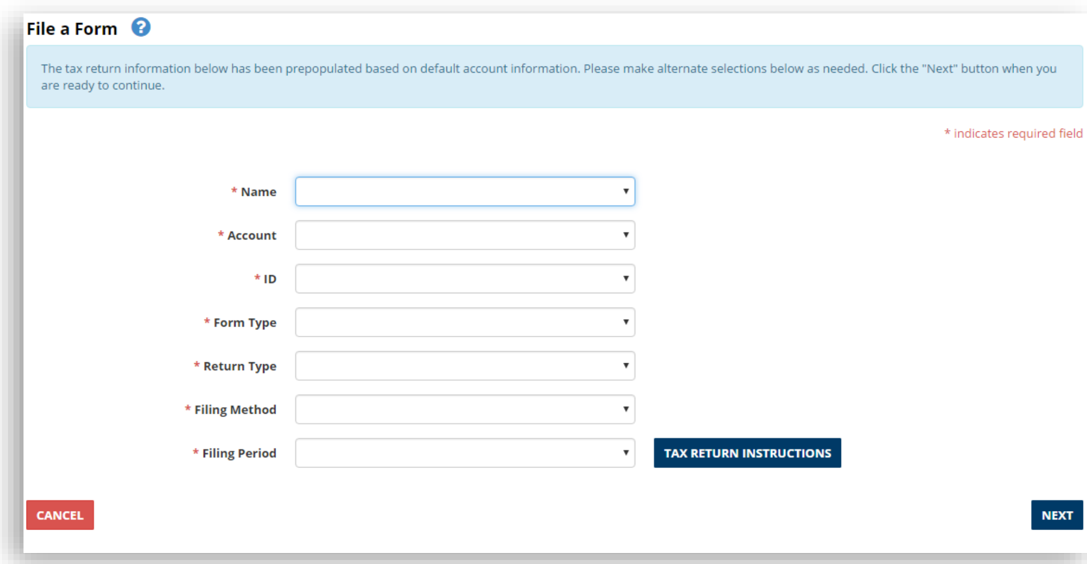
2. Select the business name from the **Name** dropdown for the taxpayer you are filing the return.
3. Select the **Account** for the taxpayer you are filing the return.
4. Select the **ID** for the taxpayer you are filing the return.
5. Select the **Form Type** for the taxpayer you are filing the return.
6. Select the **Filing Method** for the return.

Currently only Data Entry is available in the portal.

7. Select **Filing Period** for the period you are filing from the dropdown.

Tax Return Instructions for the type of return you are filing are available to the right of the Filing Period.

8. Select the **Next** button when you have completed all the required fields on the page



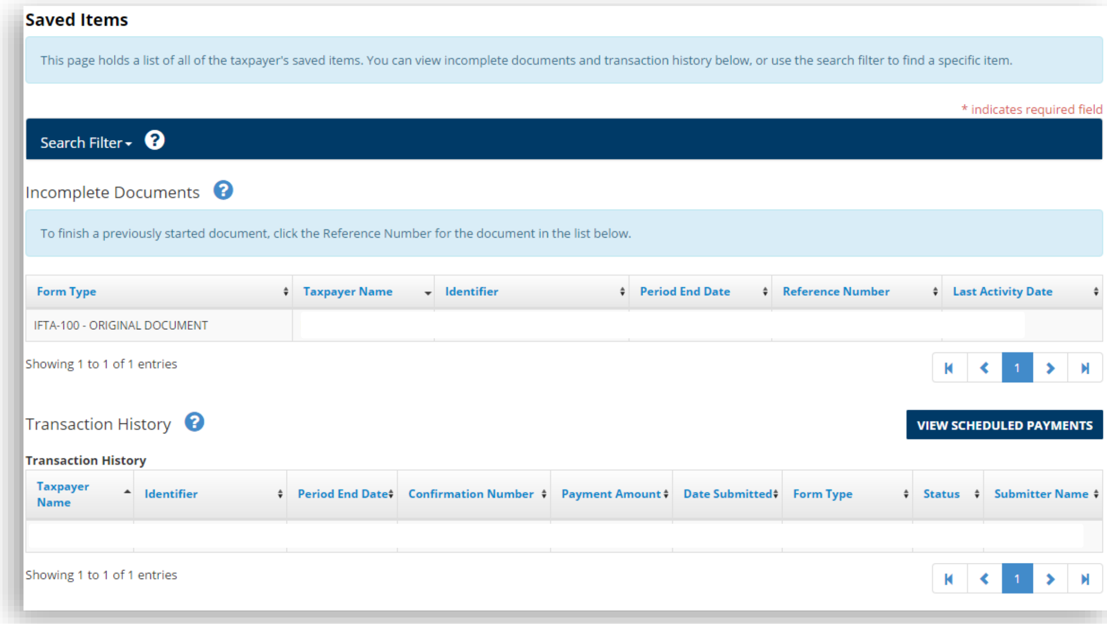
9. Complete and submit the selected tax form.

Modifying a Saved Return

You may want to modify an incomplete or saved return.

What do I do?

1. Select **Saved and Submitted Items** under **Online Transactions** from the main menu. Your saved (or Incomplete returns) returns are also available under Incomplete Documents. Your submitted returns, forms, and payments are available under Transaction History.



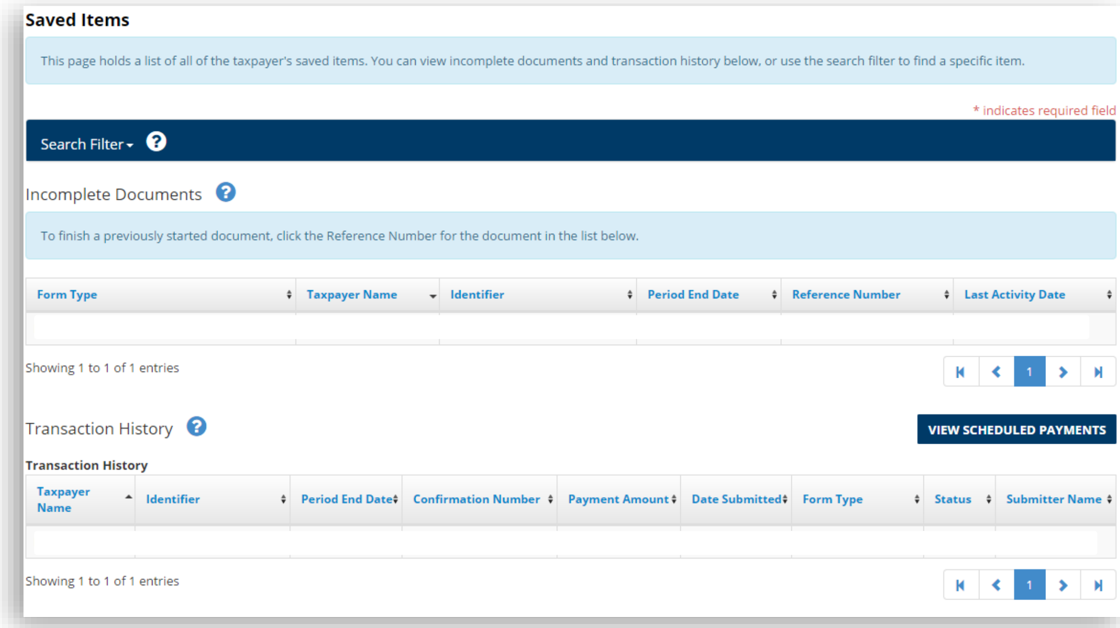
2. Select the return you want to modify in the Incomplete Tax Returns section using the **Reference Number**.
3. The form opens in the filing method it was started in.
4. Make the change(s) to your saved return.
5. Save your change(s) or file your return.
6. Select **Cancel** to cancel the changes.

Viewing a Submitted Return

You may want to view a submitted return.

What do I do?

1. Select **Saved and Submitted Items** under **Online Transactions** from the main menu. Your submitted returns, forms, and payments are available under Transaction History. Your saved (or Incomplete returns) returns are also available under Incomplete Documents.



2. Select the return you want to modify in the Incomplete Tax Returns section using the **Reference Number**.

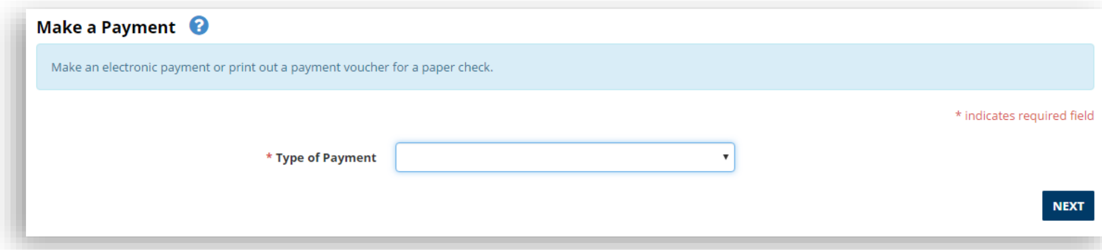
My Payments

Make a Payment

You can make a payment for a bill, a return, or a tax payment.

What do I do?

1. **Select Make a Payment** under **Online Transactions** from the main menu.
2. Select the **Type of Payment** from the drop down.

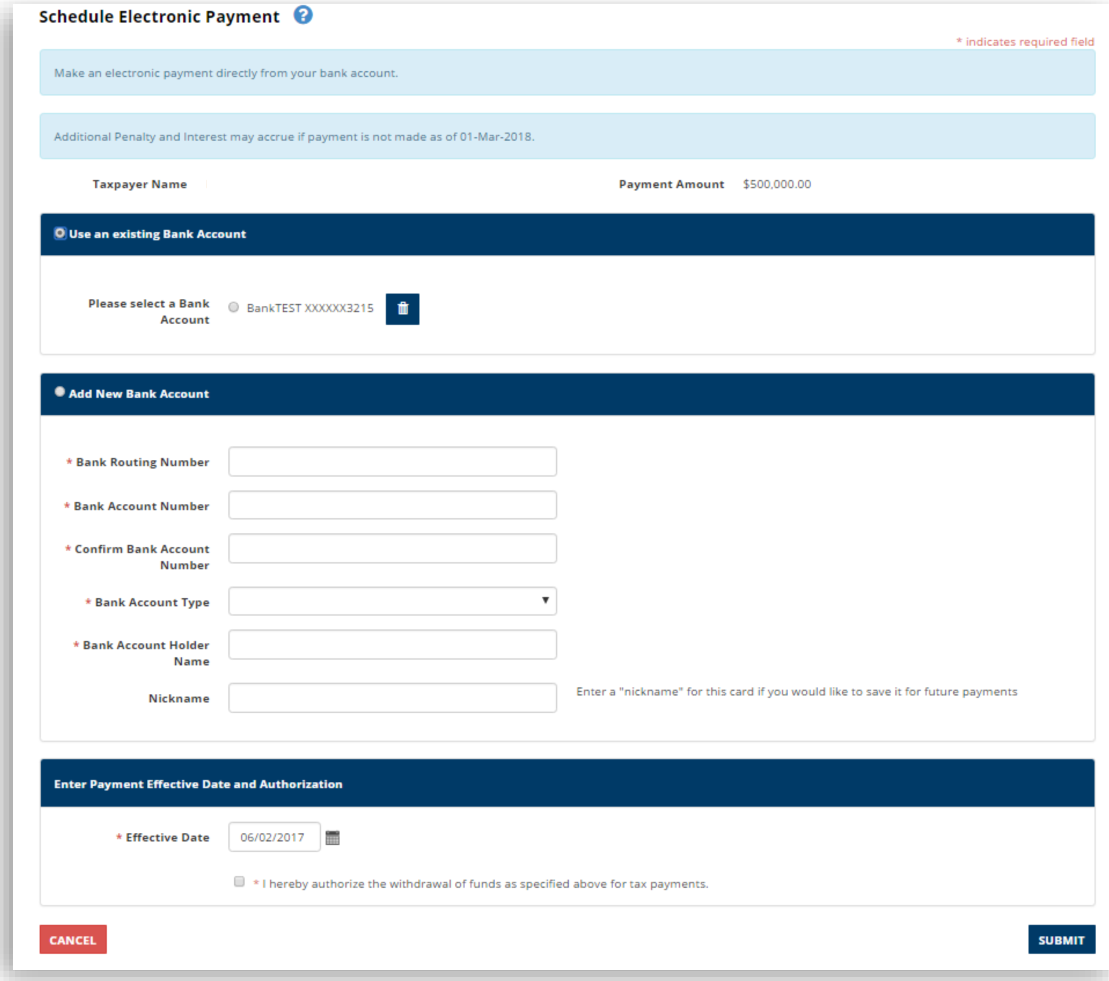


3. If you select Bill Payment as the Type of Payment, you are required to enter an Invoice Number. *The Invoice Number can be found in the bottom right corner on the coupon provided on your bill notice.*

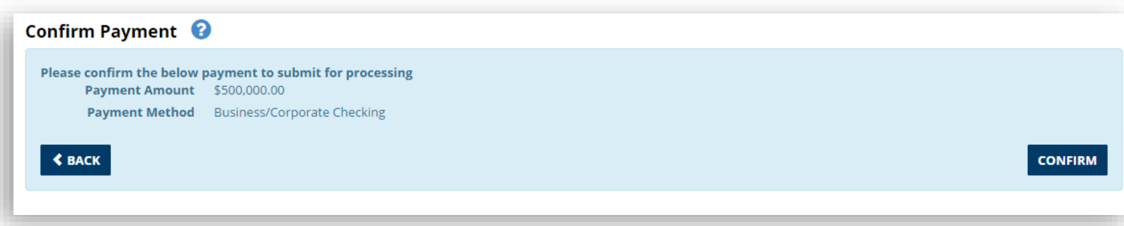
4. Select the **Next** button.

5. Enter the information requested for the type of payment you are making. Some of the fields will be prepopulated based on your default account settings.
6. Select **Payment Method:**
   a. ACH Debit

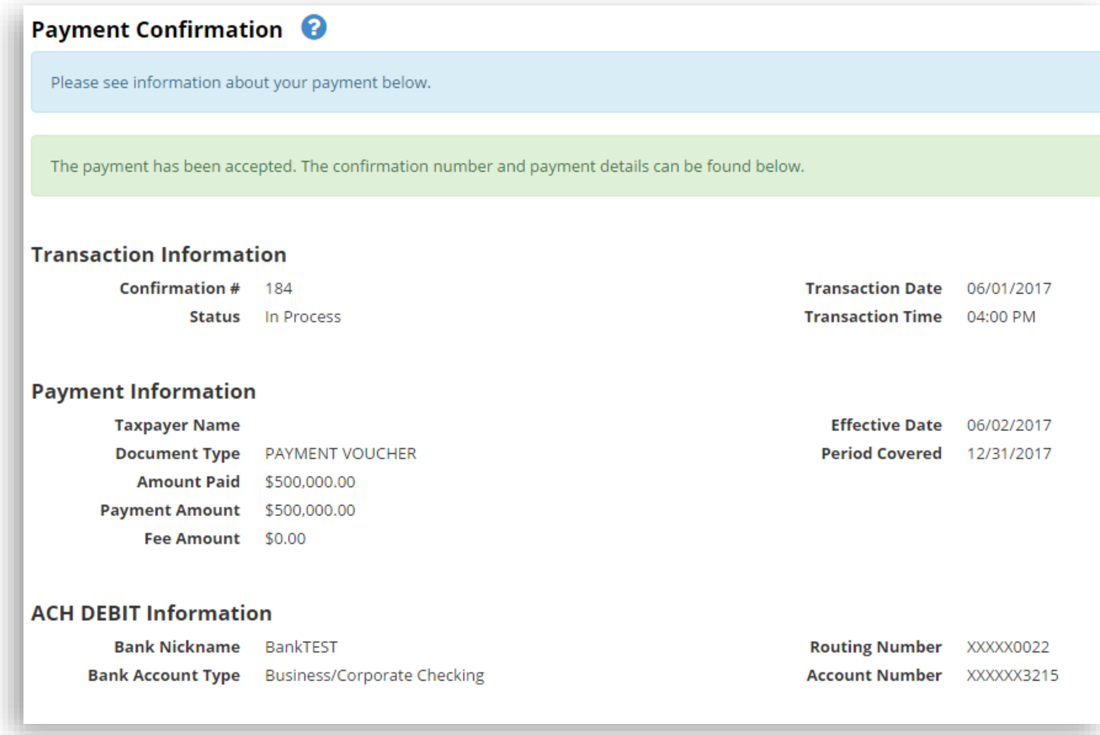
7. Select a saved bank account to make your payment or enter the banking information for a new banking account.



8. Select the **Confirm** button to confirm the payment. Select the **Back** button to make any updates to the payment information.



9. The portal will display the payment confirmation screen.

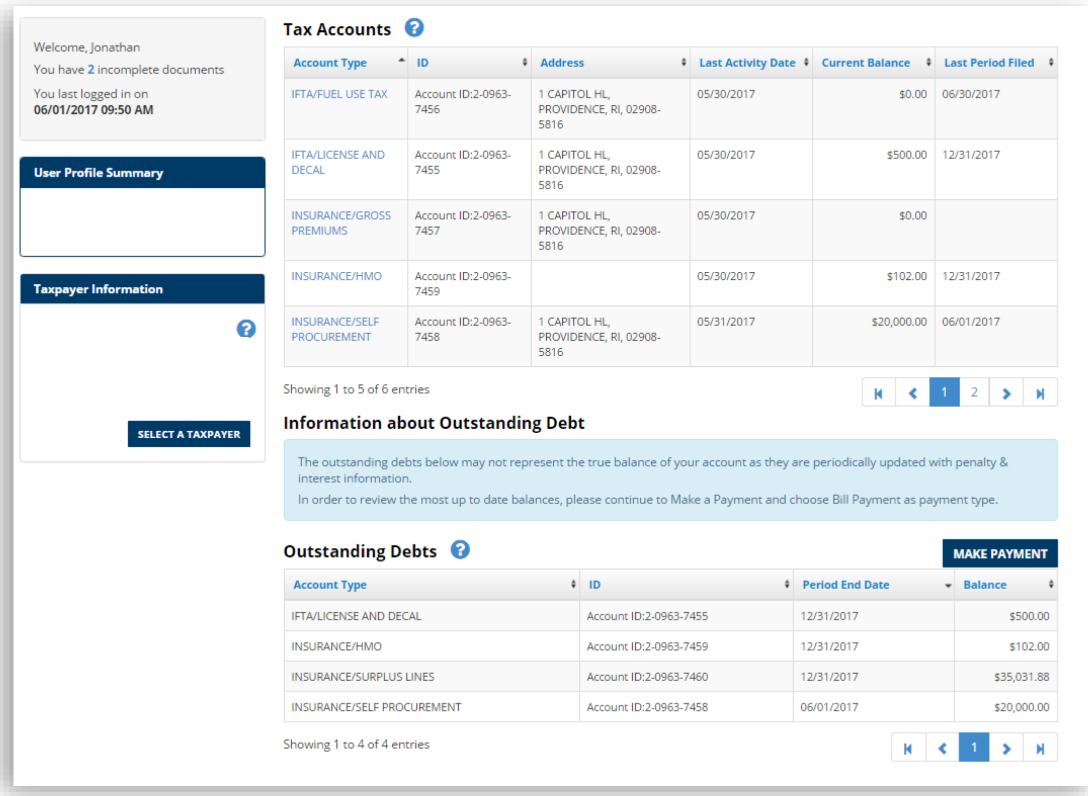


Make a Payment on a Filed Return

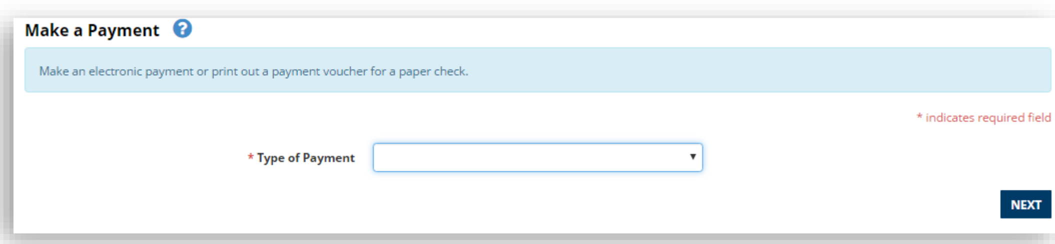
You can make a payment for a return you previously filed.

What do I do?

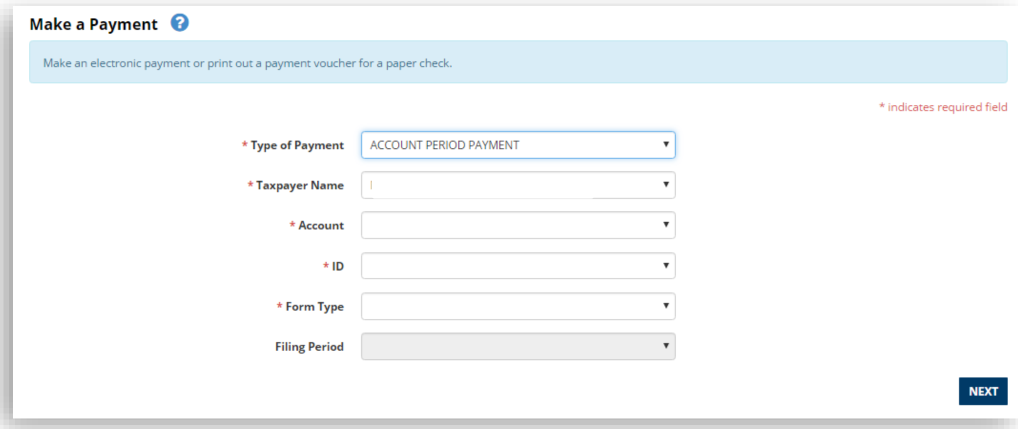
1. On your home page locate the debt you want to pay in the Outstanding Debts table. Take note of the account type, account ID, the period end date, and the balance due. Select the **Make Payment** button.



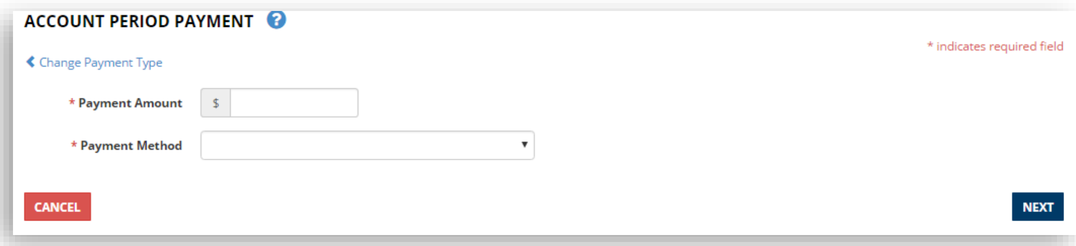
2. Select **Account Period Payment** from the **Type of Payment** drop down**.**



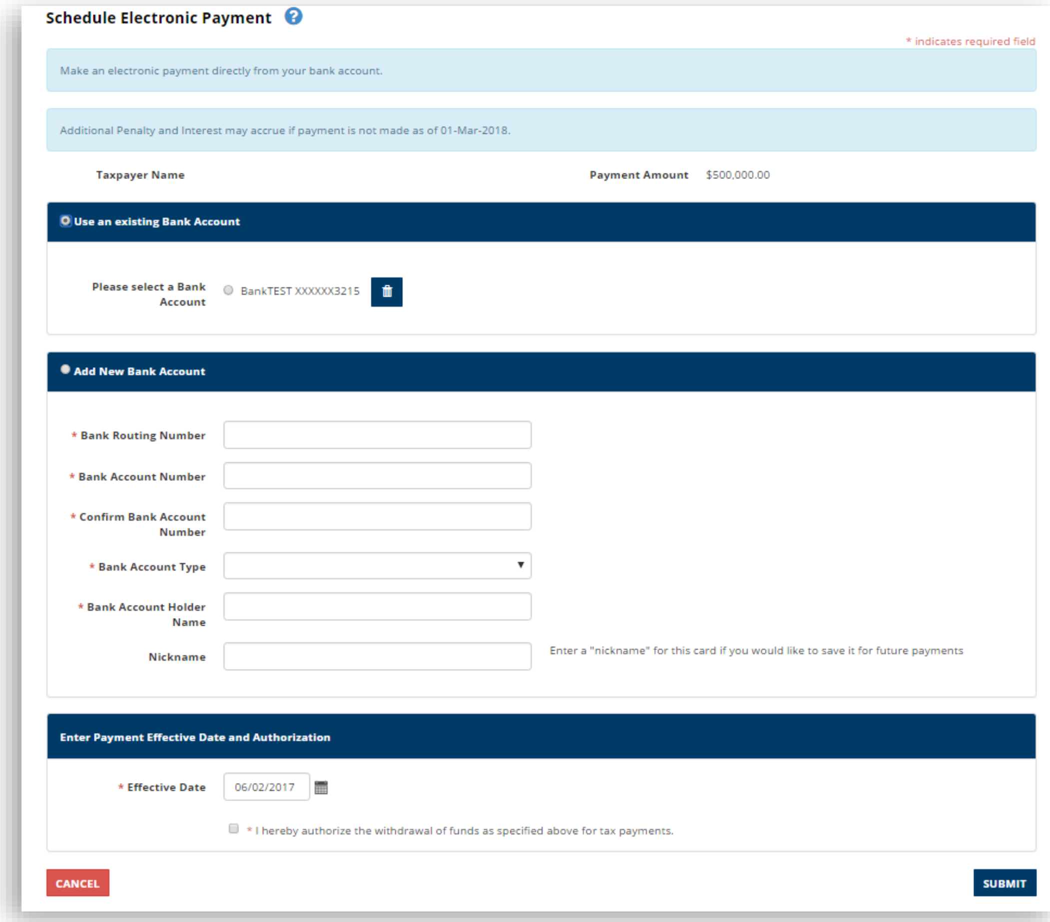
3. Complete the information on the debt you want to pay.



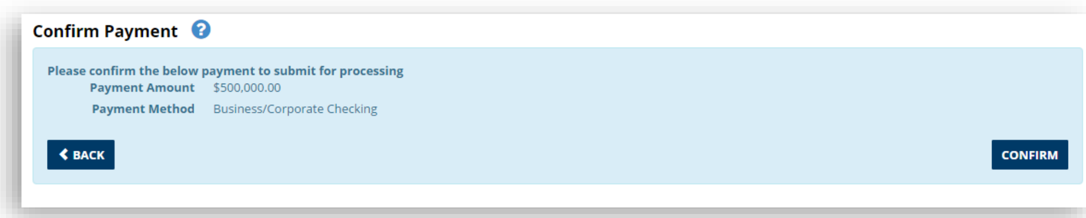
4. Enter the payment amount and select the payment method.



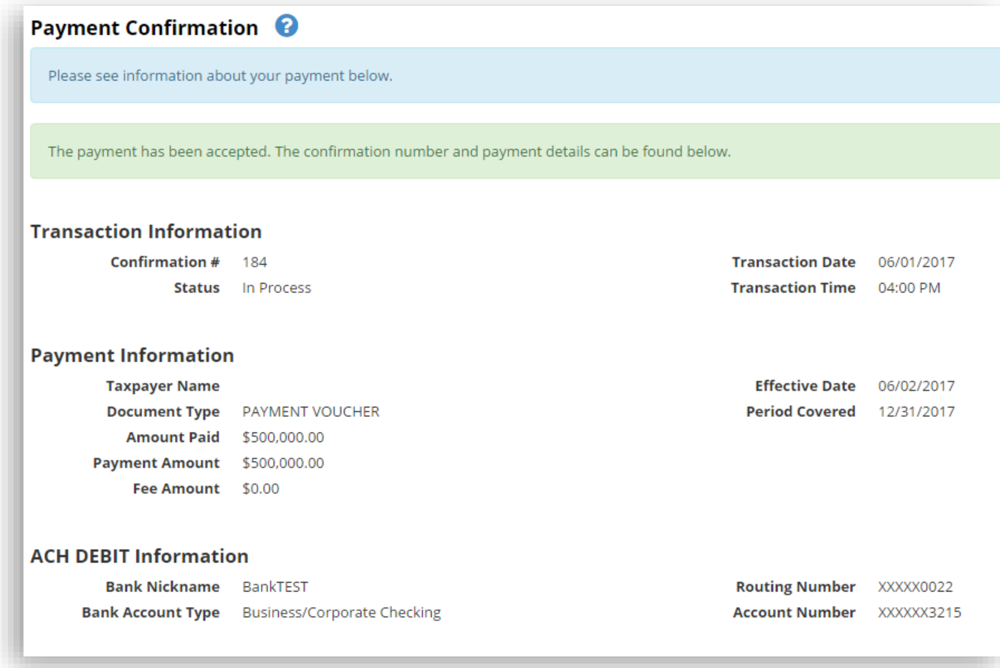
5. Select a saved bank account to make your payment or enter the banking information for a new banking account.



6. Select the **Confirm** button to confirm the payment. Select the **Back** button to make any updates to the payment information.



7. The portal will display the payment confirmation screen.

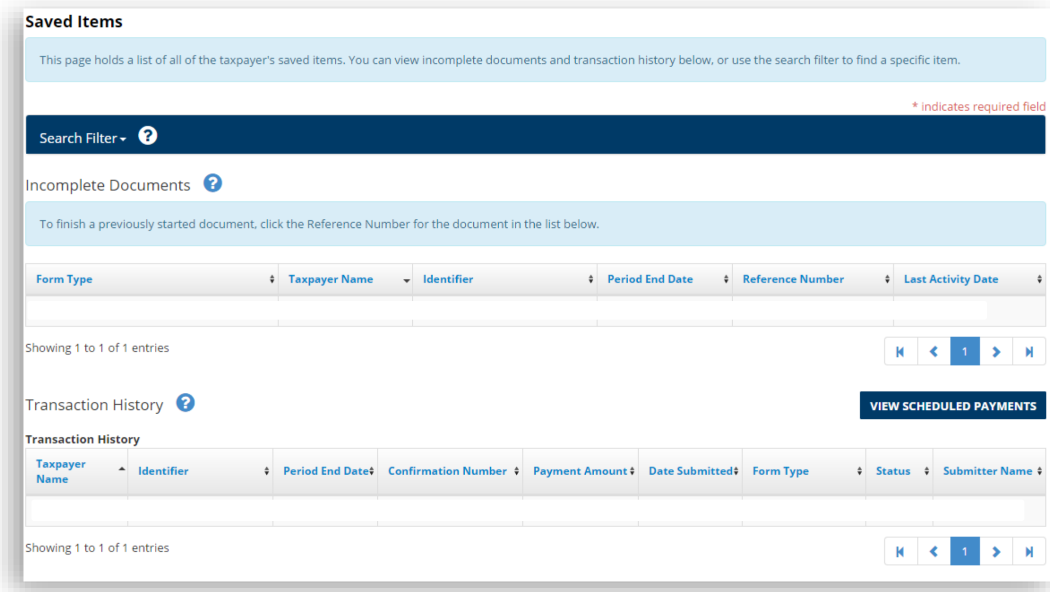


View and Cancel Scheduled Payments

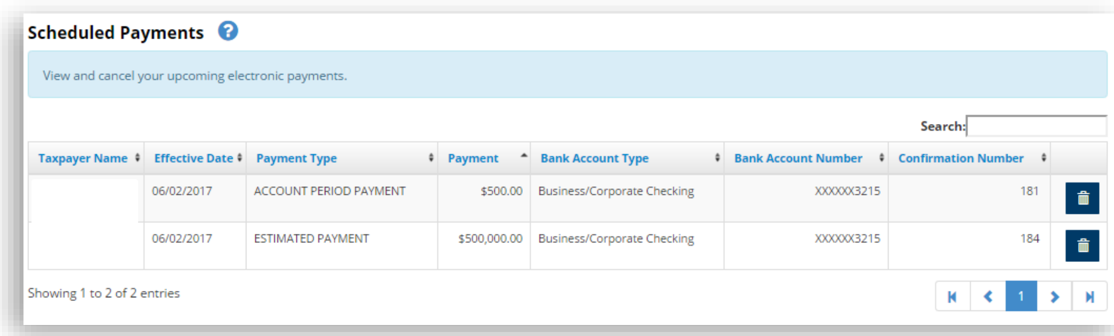
You can view and cancel scheduled payments.

What do I do?

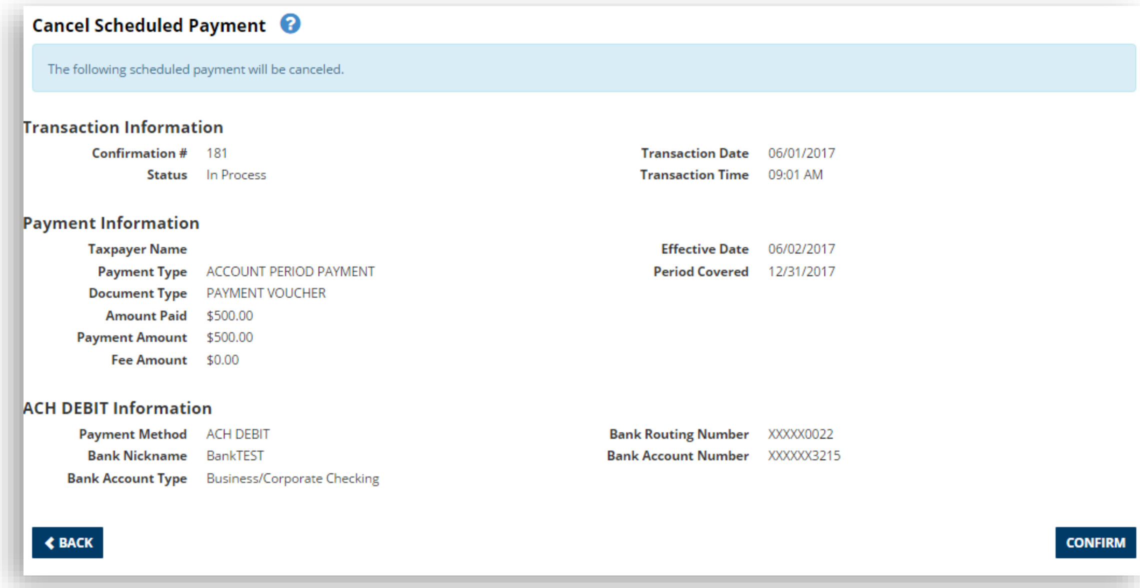
1. Select **Saved and Submitted Items** under **Online Transactions** from the main menu.
2. Select the **View Scheduled Payments** button.



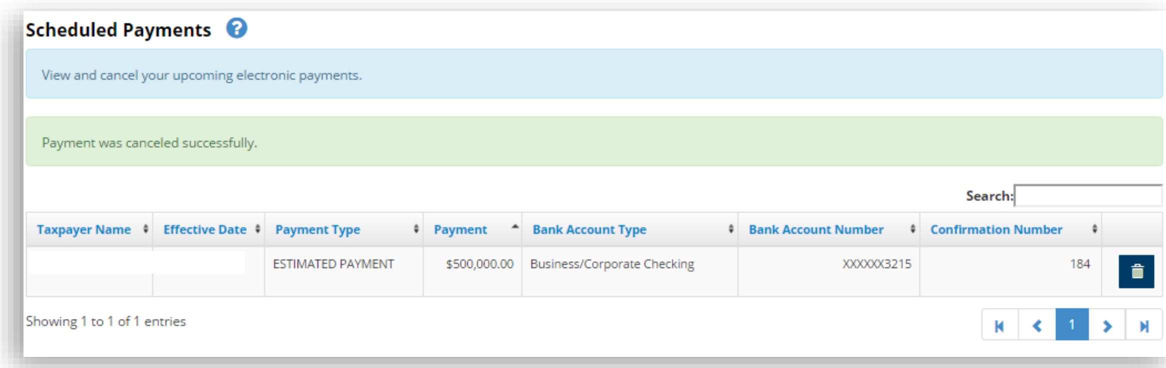
3. Your scheduled payments are displayed. To cancel your payment, select the trash  icon to the far right of the payment you wish to cancel.



4. Select the **Confirm** button to cancel the payment. Select the **Back** button to make any changes.



5. The portal displays a confirmation message.



You can cancel a payment up until 4pm the day before the payment is scheduled to be removed from your account.

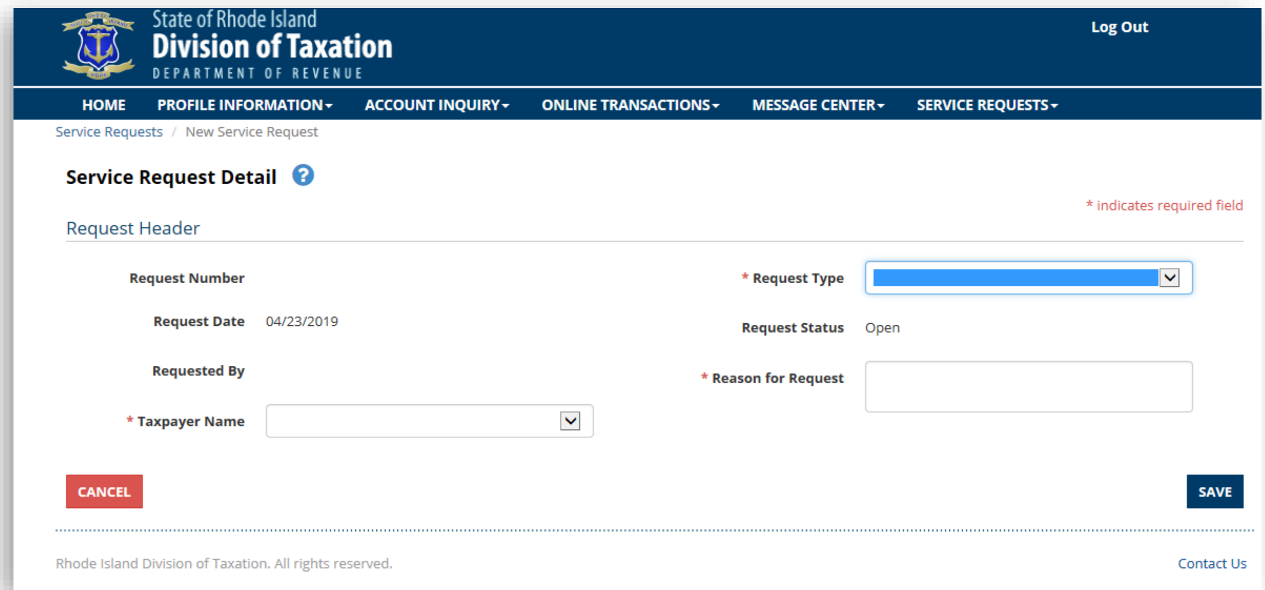
My Service Requests

Submitting a Service Request

A service request is a way for you to ask for assistance with your profile, tax account information or portal usage.

What do I do?

1. Select **New Service Request** under **Service Request** on the top menu.
2. Adjust the information using the dropdown boxes.
3. Enter required information for Service Request.
4. Select the **Save** button when you have completed the Service Request.
5. Select the **Cancel** button if you decide to cancel the Service Request.



Viewing/Modifying a Submitted Service Request

A service request is a way for you to ask for assistance with your profile, tax account information or portal usage.

What do I do?

1. Select the **Manage Service Request** hyperlink under **Service Request** on the top menu.
2. Select the Service Request that you want to View/Modify.
2. View or modify the service request.
3. Select the **Save** button to save changes to service request.
4. Select the **Cancel** button to cancel the changes.