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.

HOME	PROFILE INFORMATION ▾	ACCOUNT INQUIRY ▾	ONLINE TRANSACTIONS ▾	MESSAGE CENTER ▾	SERVICE REQUESTS ▾

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.

Tab 1   **Tab 2**   **Tab 3**

Return Header	Return Section A	Diesel Line Items	Diesel Totals	Gasoline Line Items	Gasoline Totals	Ethanol Line Items	Ethanol Totals	More ▾
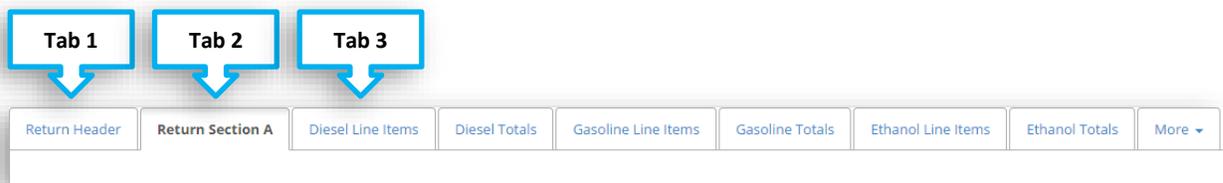
Using Keyboard Shortcuts

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.
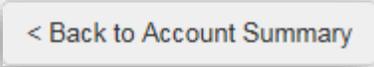

Ctrl + **Z** – If you delete the contents of a field by accident, press these two keys at the same time to restore the deleted text.

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.
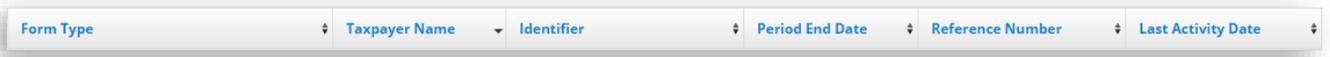

Required Fields

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.
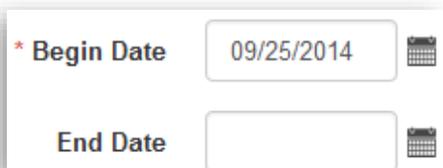
Help Topics

Select the ⑦ icon to view more information on that topic.

Tax Accounts ❓

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.
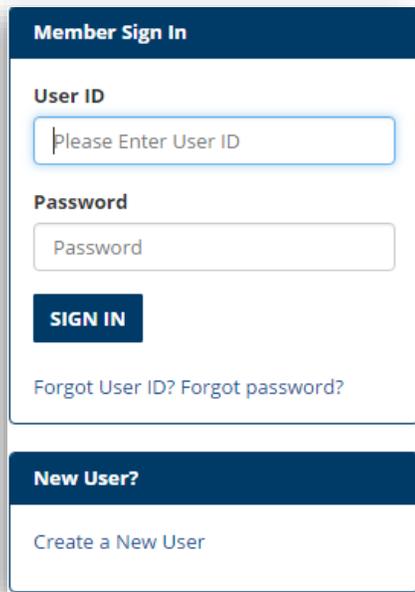
Member Sign In

User ID

Please Enter User ID

Password

Password

SIGN IN

Forgot User ID? Forgot password?

New User?

Create a New User

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

State of Rhode Island
Division of Taxation
DEPARTMENT OF REVENUE

HOME

Home / Register for Secure Services

Register for Secure Services ❓

Step 1:

If you already have a business in the state and would like to register to use the Rhode Island Division of Taxation's secure services, please provide the required information in the following screens. For this process you will need to provide information on the business(es) that you are legally authorized to view. After completing the registration of your web portal account you will receive an email with a temporary password and login instructions. When logging in for the first time, Taxpayer Administrator accounts and Authorized Taxpayer accounts will receive different instructions on how to complete the registration process.

If you already have a User ID and would like to add an existing business to that registration, please log in and select Add Authorized Business from the Profile Information menu.

**In order to complete the registration process and view your authorized accounts you will need one of the following combinations of criteria:
1. FEIN, Business Name, Notice Number (Notice ID), or
2. FEIN, PIN Number, or
3. SSN, First Name, Last Name, Notice Number (Notice ID), or
4. SSN, PIN

Please scroll down the Tax Portal Usage Terms section to accept the Terms and Conditions.

* indicates required field

Tax Portal Usage Terms

TERMS OF USE

Welcome to the State of Rhode Island Division of Taxation Portal. Your privacy is important. Please carefully review the Terms of Use (TOU) before using Portal. These TOU establish a binding agreement that governs your use of this service and together with the Privacy Policy and Data Policy (together, "Terms"), govern your use of this service. By using this service, you agree to be bound by these Terms. If you do not agree to these Terms, you may not use this service. The following policies apply only to the use of Portal.

Confidentiality

Any information provided by the user through the Portal, including personally identifiable information (PII), is confidential and its disclosure is prohibited by federal and state law unless the Division of Taxation is ordered to make a disclosure by a court of competent jurisdiction.

Use by Taxpayers in Good Standing

The Portal is intended to be used by taxpayers in good standing. If the renewal or issuance of any permit, license or other state tax document has been suspended, blocked or denied by the Division of Taxation, the use of the Portal to circumvent that suspension, block or denial constitutes intentional misuse of the Portal. Any permit, license or other state tax document procured through the Portal contrary to law is invalid and does not bind the State.

Disclaimer of Liability

Neither the Division of Taxation nor any of its employees or agents will be liable for any improper or incorrect use of the information described or contained herein. The Division of Taxation employees and agents assume no responsibility for anyone's use of the information. In no event will the Division of Taxation, or any of their employees or agents, be liable for any direct, indirect, incidental, special, exemplary, or consequential damages (including, but not limited to, procurement or substitute goods or services; loss of use, data, or profits; or business interruption) however caused and on any theory of liability, whether in contract, strict liability, or tort (including negligence or otherwise) arising in any way out of the use of this

* ☐ I'm not a robot   reCAPTCHA
                       Privacy - Terms

CANCEL   NEXT

Rhode Island Division of Taxation. All rights reserved.   Contact Us

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.

Register for Secure Services - Signature ❓

Progress ▓▓▓▓▓▓ 50%

Step 3:
Upon knowledge of a possible penalty being incurred, I acknowledge that I am authorized to register as a Web Portal User online.
Please select the "Yes" button if you agree. Select the "No" button to cancel the submission and go back to the previous page.

[NO]   [YES]

Rhode Island Division of Taxation. All rights reserved.   Contact Us

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

Register for Secure Services ❓

Progress ▓▓▓▓▓▓▓▓▓▓ 100%

Step 4:

Registration Confirmation

Your registration submission has been confirmed. Your confirmation number is TU00000195091. Please record this number for your records or print this page from your browser. You will be receiving an email shortly with instructions on how to log on and access secure information and services. If you do not receive an email within 24 hours, please Contact Us

Rhode Island Division of Taxation. All rights reserved.   Contact Us

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

Member Sign In

User ID

Please Enter User ID

Password

Password

[SIGN IN]

Forgot User ID? Forgot 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.

Enrollment - Security Questions ❓

Thank you for registering for the web portal.
As part of the sign up process, please select and answer 3 security questions below. These questions will be used for security verification.

* indicates required field

* Security Question #1	[▼]	* Question #1 Answer	Security Question #1 Answer
* Security Question #2	[▼]	* Question #2 Answer	Security Question #2 Answer
* Security Question #3	[▼]	* Question #3 Answer	Security Question #3 Answer

SAVE

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

Change Password ❓

* indicates required field

Thank you for registering for the web portal. Please enter and confirm a new password below. New passwords must be at least 8 characters long and contain an upper case, lower case, number and special character.

* Current Password [   ]

* New Password [   ]

* Confirm New Password [   ]

SAVE

11. The portal displays a confirmation page.

Change Password ❓

The password was changed successfully. Please select Continue to login with the new password.

CONTINUE

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.
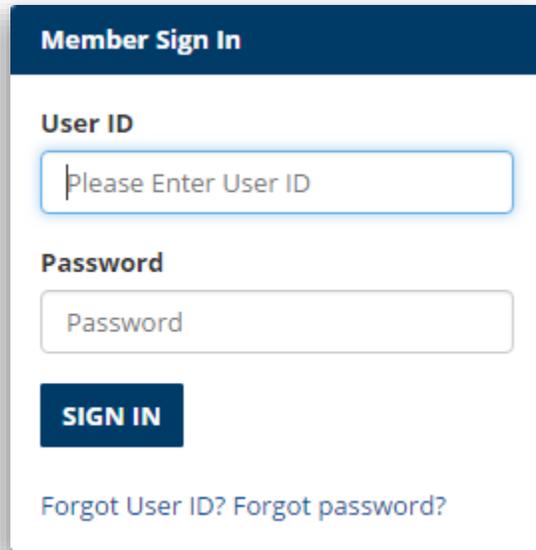
Logging Out

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.

Reset Password

Please enter the email address associated with your web portal account below in order to reset your password.
You will receive an email with a link to answer your security questions and change your password.
For assistance, please contact customer service.

* indicates required field

* Email Address

CANCEL   SUBMIT

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.

Security Questions ❓

As part of our reset password process, please validate your identity by answering the security questions below. If you need assistance, please contact the help desk.

* indicates required field

* What is your spouse or partner's mother's maiden name? [   ]

* What was your childhood nickname? [   ]

* What was your first pets name? [   ]

SUBMIT

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

Change Password ❓   * indicates required field

We have received your request to reset your password. Please enter and confirm a new password below. New passwords must be at least 8 characters long and contain an upper case, lower case, number and special character.

* New Password [   ]

* Confirm New Password [   ]

SAVE

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

Change Password ❓

The password was changed successfully. Please select Continue to login with the new password.

CONTINUE

9. Log into the portal using your new password.

Member Sign In

User ID

Password

Password

SIGN IN

Forgot User ID? Forgot 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.

Security Questions ❓

As part of our reset password process, please validate your identity by answering the security questions below. If you need assistance, please contact the help desk.

* indicates required field

* What is your spouse or partner's mother's maiden name?	
* What was your childhood nickname?	
* What was your first pets name?	

SUBMIT

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.

Change Password ❓

* indicates required field

Please enter and confirm a new password below. New passwords must be at least 8 characters long and contain an upper case, lower case, number and special character.

* User ID	jspptest4
* New Password	
* Confirm New Password	

SAVE

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

Change Password ❓

The password was changed successfully. Please select Continue to login with the new password.

CONTINUE

9. Log into the portal using your new password.
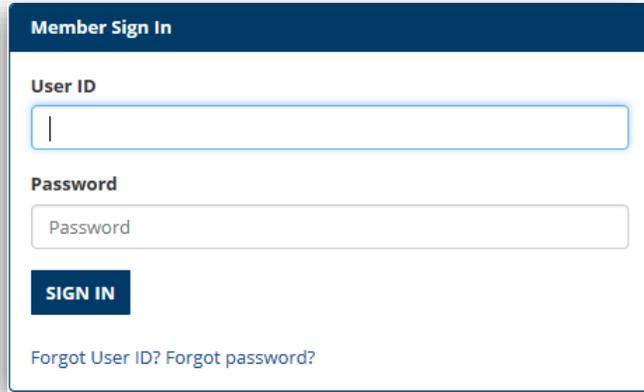
Member Sign In

User ID

Password

Password

SIGN IN

Forgot User ID? Forgot 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.

Manage Authorized Users ❓

This page allows you, for each taxpayer for which you are the Authorized Administrator, to designate one or more individuals as Authorized Users for the purpose of viewing and/or modifying account information, and executing one or more account functions based on specific permissions you assign them. A Authorized user is someone other than an employee or officer of the taxpayer (for example, an accountant or attorney).

By adding a new Authorized User, you are certifying that you designate that individual as an authorized agent of the taxpayer and allow that individual to have access via this portal to confidential State of US tax information for the periods indicated; for the Tax Type[s] selected; and in order perform any Taxpayer Functions selected.

ADD NEW AUTHORIZED USER

Search: _____

User Name	User ID	Taxpayer Name	Effective Start Date	Effective End Date	Status
	jspptest2		05/31/2017		Active
	jspptest2		05/31/2017	05/01/2018	Active
	jspptest2		05/31/2017	06/01/2022	Active
	jspptest2		07/01/2017	06/29/2018	Active

Showing 1 to 4 of 4 entries

|◀ ◀ 1 ▶ ▶|

ⓘ

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
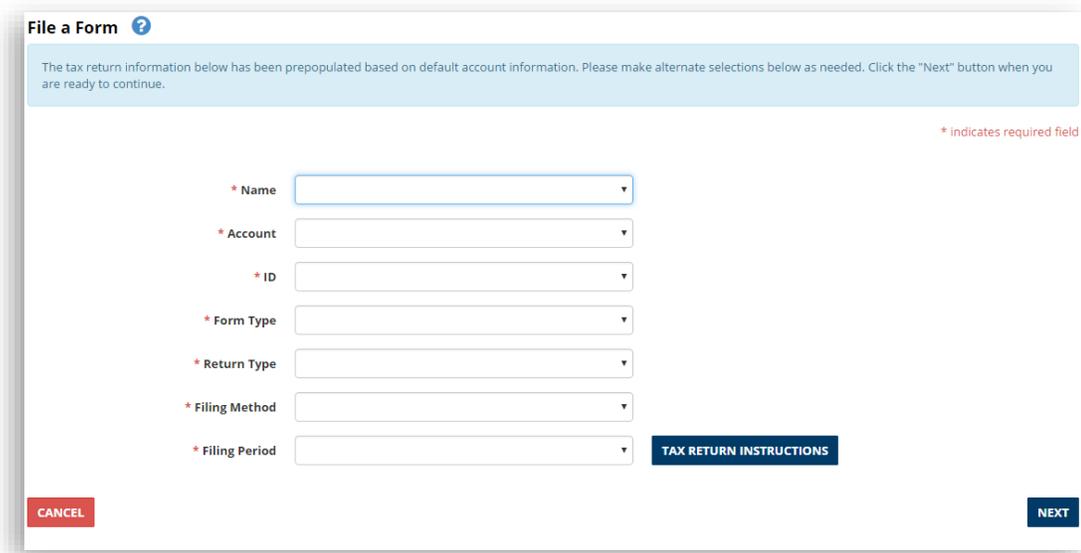
9. Complete and submit the selected tax form.

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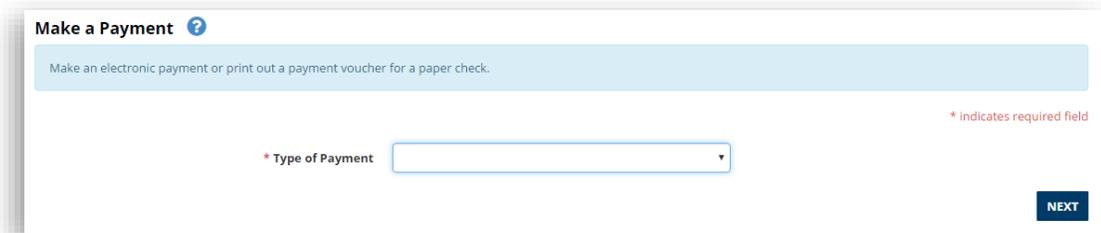
3. *If you select Bill Payment as the Type of Payment, you are required to enter an Invoice Number. The Invoice Number can be found in the bottom right corner on the coupon provided on your bill notice.*

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.

Payment Confirmation ❓

Please see information about your payment below.

The payment has been accepted. The confirmation number and payment details can be found below.

Transaction Information

Confirmation #	184	Transaction Date	06/01/2017
Status	In Process	Transaction Time	04:00 PM

Payment Information

Taxpayer Name		Effective Date	06/02/2017
Document Type	PAYMENT VOUCHER	Period Covered	12/31/2017
Amount Paid	$500,000.00		
Payment Amount	$500,000.00		
Fee Amount	$0.00		

ACH DEBIT Information

Bank Nickname	BankTEST	Routing Number	XXXXX0022
Bank Account Type	Business/Corporate Checking	Account Number	XXXXXX3215

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.

Tax Accounts ❓

Welcome, Jonathan
You have **2** incomplete documents
You last logged in on
06/01/2017 09:50 AM

Account Type	ID	Address	Last Activity Date	Current Balance	Last Period Filed
IFTA/FUEL USE TAX	Account ID:2-0963-7456	1 CAPITOL HL, PROVIDENCE, RI, 02908-5816	05/30/2017	$0.00	06/30/2017
IFTA/LICENSE AND DECAL	Account ID:2-0963-7455	1 CAPITOL HL, PROVIDENCE, RI, 02908-5816	05/30/2017	$500.00	12/31/2017
INSURANCE/GROSS PREMIUMS	Account ID:2-0963-7457	1 CAPITOL HL, PROVIDENCE, RI, 02908-5816	05/30/2017	$0.00	
INSURANCE/HMO	Account ID:2-0963-7459		05/30/2017	$102.00	12/31/2017
INSURANCE/SELF PROCUREMENT	Account ID:2-0963-7458	1 CAPITOL HL, PROVIDENCE, RI, 02908-5816	05/31/2017	$20,000.00	06/01/2017

User Profile Summary

Taxpayer Information ❓

SELECT A TAXPAYER

Showing 1 to 5 of 6 entries   ⏮ ◀ **1** 2 ▶ ⏭

Information about Outstanding Debt

The outstanding debts below may not represent the true balance of your account as they are periodically updated with penalty & interest information.
In order to review the most up to date balances, please continue to Make a Payment and choose Bill Payment as payment type.

Outstanding Debts ❓   **MAKE PAYMENT**

Account Type	ID	Period End Date	Balance
IFTA/LICENSE AND DECAL	Account ID:2-0963-7455	12/31/2017	$500.00
INSURANCE/HMO	Account ID:2-0963-7459	12/31/2017	$102.00
INSURANCE/SURPLUS LINES	Account ID:2-0963-7460	12/31/2017	$35,031.88
INSURANCE/SELF PROCUREMENT	Account ID:2-0963-7458	06/01/2017	$20,000.00

Showing 1 to 4 of 4 entries   ⏮ ◀ **1** ▶ ⏭

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

Make a Payment ❓

Make an electronic payment or print out a payment voucher for a paper check.

*indicates required field

* **Type of Payment**   [▼]

NEXT

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.

Schedule Electronic Payment ❓

* indicates required field

Make an electronic payment directly from your bank account.

Additional Penalty and Interest may accrue if payment is not made as of 01-Mar-2018.

| **Taxpayer Name** | **Payment Amount** | $500,000.00 |

⊙ Use an existing Bank Account

Please select a Bank Account   ○ BankTEST XXXXXX3215   🗑

⊙ Add New Bank Account

* Bank Routing Number	[ ]
* Bank Account Number	[ ]
* Confirm Bank Account Number	[ ]
* Bank Account Type	[▼]
* Bank Account Holder Name	[ ]
Nickname	[ ] Enter a "nickname" for this card if you would like to save it for future payments

Enter Payment Effective Date and Authorization

| * Effective Date | 06/02/2017 📅 |

☐ * I hereby authorize the withdrawal of funds as specified above for tax payments.

[CANCEL]   [SUBMIT]

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

Confirm Payment ❓

Please confirm the below payment to submit for processing
Payment Amount $500,000.00
Payment Method   Business/Corporate Checking

[‹ BACK]   [CONFIRM]

7. The portal will display the payment confirmation screen.

Payment Confirmation

Please see information about your payment below.

The payment has been accepted. The confirmation number and payment details can be found below.

Transaction Information

Confirmation #	184	Transaction Date	06/01/2017
Status	In Process	Transaction Time	04:00 PM

Payment Information

Taxpayer Name		Effective Date	06/02/2017
Document Type	PAYMENT VOUCHER	Period Covered	12/31/2017
Amount Paid	$500,000.00		
Payment Amount	$500,000.00		
Fee Amount	$0.00		

ACH DEBIT Information

Bank Nickname	BankTEST	Routing Number	XXXXX0022
Bank Account Type	Business/Corporate Checking	Account Number	XXXXXX3215

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.

Cancel Scheduled Payment ❓

The following scheduled payment will be canceled.

Transaction Information

Confirmation #	181	Transaction Date	06/01/2017
Status	In Process	Transaction Time	09:01 AM

Payment Information

Taxpayer Name		Effective Date	06/02/2017
Payment Type	ACCOUNT PERIOD PAYMENT	Period Covered	12/31/2017
Document Type	PAYMENT VOUCHER		
Amount Paid	$500.00		
Payment Amount	$500.00		
Fee Amount	$0.00		

ACH DEBIT Information

Payment Method	ACH DEBIT	Bank Routing Number	XXXXX0022
Bank Nickname	BankTEST	Bank Account Number	XXXXXX3215
Bank Account Type	Business/Corporate Checking		

❮ BACK   CONFIRM

5. The portal displays a confirmation message.

Scheduled Payments ❓

View and cancel your upcoming electronic payments.

Payment was canceled successfully.

Search: [   ]

Taxpayer Name	Effective Date	Payment Type	Payment	Bank Account Type	Bank Account Number	Confirmation Number	
		ESTIMATED PAYMENT	$500,000.00	Business/Corporate Checking	XXXXXX3215	184	🗑

Showing 1 to 1 of 1 entries

ⓘ 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.