

Web Portal

User Guide

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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.

The screenshot displays the home page of the Rhode Island Taxpayer Portal. At the top, the header includes the state seal and the text "State of Rhode Island Division of Taxation DEPARTMENT OF REVENUE". Below the header is a navigation bar with a "HOME" button. The main content area is divided into several sections:

- Member Sign In:** A form with fields for "User ID" and "Password", a "SIGN IN" button, and links for "Forgot User ID? Forgot password?".
- New User?:** A button labeled "Create a New User".
- Frequently Asked Questions:** A section with two questions: "Who should use the online taxpayer portal and what taxes can be filed?" and "How do I create a Portal user account?", followed by a "More >" link.
- Log In - Do you have a Taxpayer Portal User ID and Password?:** A central section with two bullet points:
 - **Yes.** I log into the online services for the Taxpayer Portal.
 - Use the **Member Sign In** section to the left to access your account.
 - **No.** I am a first time user to the Rhode Island Taxpayer Portal and do not have a Taxpayer Portal User ID.
 - Use the **New User** section to the left to create a new Taxpayer Portal user account.
- Popular Services:** A list of services including Tax Forms, Administrative Decisions, Advisories, Where's My Refund, Business Registration, Reports, Regulations, Newsletters, and Contact Us.

A large image of a city skyline with a bridge over a river is positioned below the central text and to the left of the Popular Services list.

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.

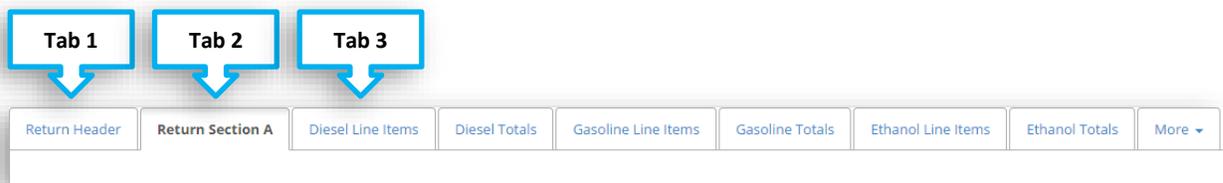
To select an option from the menu, select the appropriate topic and click the desired hyperlink in the drop-down list.



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.

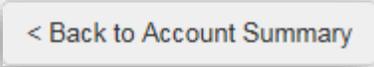
Tab key – Move forward from the current field to the next one in the window.

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.

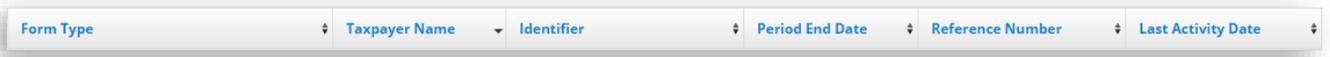


Ctrl + Z – If you delete the contents of a field by accident, press these two keys at the same time to restore the deleted text.

Sorting

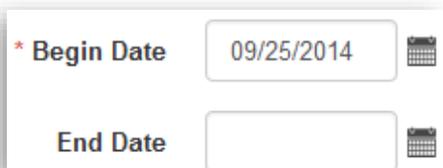
Certain sections organize lists beneath column headers. Lists containing column headers can be sorted and arranged to help you in organizing the list information in a useful way.

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.

Tax Accounts 

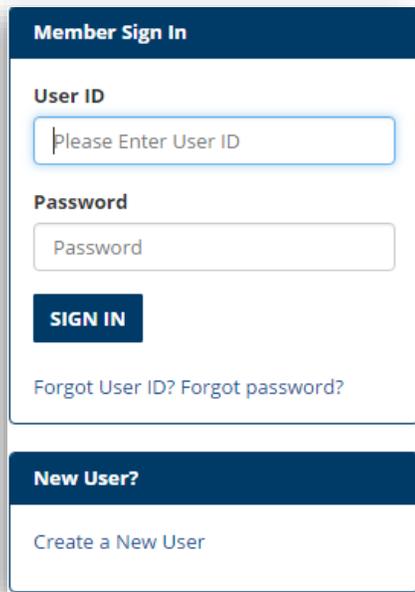
Security and Access

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.



The image shows a 'Member Sign In' form. It has a dark blue header with the text 'Member Sign In'. Below the header, there are two input fields: 'User ID' with a placeholder 'Please Enter User ID' and 'Password' with a placeholder 'Password'. A dark blue button labeled 'SIGN IN' is positioned below the password field. Underneath the button is a link that says 'Forgot User ID? Forgot password?'. At the bottom of the form, there is a dark blue section titled 'New User?' with a link that says 'Create a New User'.

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



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



CANCEL

NEXT

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

* Last Name

Position

* Proposed User ID

* Daytime Phone

Extension

Mobile Phone

* Email

* Confirm Email

CANCEL

NEXT

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[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**

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7. You will receive a confirmation message and an email will be 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](#)

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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.

* Security Question #1

* Security Question #2

* Security Question #3

* Question #1 Answer * indicates required field

* Question #2 Answer

* 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.

The screenshot shows the user portal for the State of Rhode Island Division of Taxation. The header includes the state logo and the text 'State of Rhode Island Division of Taxation DEPARTMENT OF REVENUE'. A 'Log Out' link is in the top right. A navigation bar contains 'HOME', 'EDIT PERSONAL INFO', and 'MESSAGE CENTER'. A welcome message on the left says 'Welcome, jon' and 'You last logged in on Monday, 04/22/2019 11:54 AM'. The main content area is titled 'Complete Your Registration' and contains the text: 'Your user id has not been registered with any taxpayer. To complete your registration, see the options below: Administrators - If you will manage the online account of an entity or individual taxpayer, register for administrator access to the taxpayer's account [here](#) Users - If you will perform tax functions on behalf of a taxpayer, provide your user id to the taxpayer's administrator to be granted access to a taxpayer's online account.' At the bottom, there is a footer with 'Rhode Island Division of Taxation. All rights reserved.' and a 'Contact Us' link.

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

The screenshot shows a selection screen titled 'Select one of the options below' with a help icon. A progress bar at the top right shows 'Progress 0%'. A light blue box contains the instruction: 'Please review the options below and select the one that best fits your registration scenario to continue with the registration process.' Two radio button options are listed: 'I am adding administrator authorization and have an FEIN and my required PIN.' (which is selected) and 'I am adding administrator authorization and do not have an FEIN, but have my required PIN.' Below the options are three buttons: 'BACK', 'CANCEL', and 'NEXT'. The footer at the bottom contains 'Rhode Island Division of Taxation. All rights reserved.' and a 'Contact Us' link.

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.

Add Authorized Taxpayer 

Progress 25%

Please provide information on the entity that you are legally authorized to view.

User ID jsptest3 User Name jonathan slusarz

* indicates required field

Entity Information

* FEIN

* PIN

[← BACK](#) [CANCEL](#) [NEXT](#)

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

Authorized Taxpayer - Signature 

Progress 50%

Upon knowledge of a possible penalty being incurred, I acknowledge that I am authorized to register as Taxpayer Administrator 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](#)

.....

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6. A confirmation page will display.

Add Authorized Taxpayer 

Progress 100%

Registration Confirmation

Your Authorized Taxpayer modification has been confirmed. If you do not see changes to your secure services within 24 hours, please [Contact Us](#)

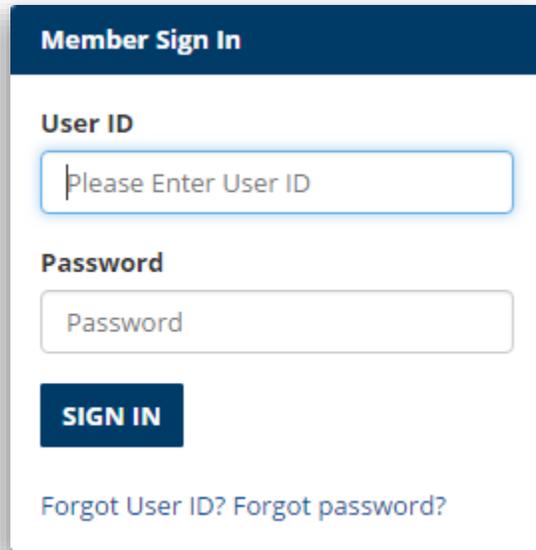
.....

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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.



The image shows a 'Member Sign In' form. It has a dark blue header with the text 'Member Sign In' in white. Below the header, there are two input fields: 'User ID' and 'Password'. The 'User ID' field contains the placeholder text 'Please Enter User ID'. The 'Password' field contains the placeholder text 'Password'. Below the input fields is a dark blue button with the text 'SIGN IN' in white. At the bottom of the form, there is a link that says 'Forgot User ID? Forgot password?'.

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.

The image shows a "Member Sign In" form. It has a dark blue header with the text "Member Sign In". Below the header are two input fields: "User ID" with a placeholder "Please Enter User ID" and "Password" with a placeholder "Password". Below the fields is a dark blue button with the text "SIGN IN". At the bottom of the form, there are two hyperlinks: "Forgot User ID?" and "Forgot password?".

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.

* Email Address

* indicates required field

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.



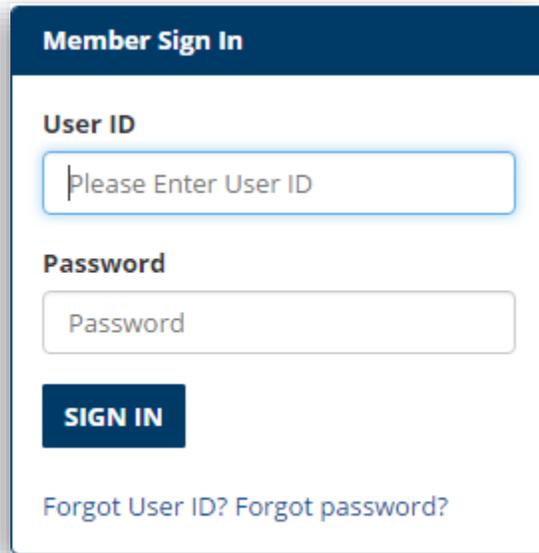
The image shows a 'Member Sign In' form. It has a dark blue header with the text 'Member Sign In'. Below the header, there are two input fields: 'User ID' and 'Password'. The 'User ID' field contains a single vertical bar character. The 'Password' field contains the text 'Password'. Below the input fields is a dark blue button with the text 'SIGN IN' in white. At the bottom of the form, there is a link that says '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.

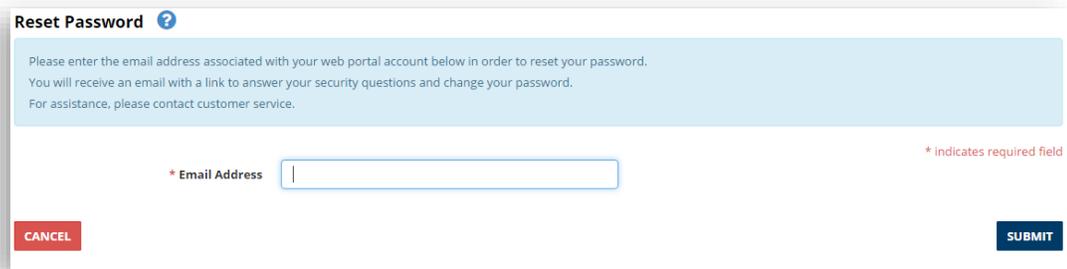
What do I do?

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



The image shows a 'Member Sign In' form. It has a dark blue header with the text 'Member Sign In'. Below the header, there are two input fields: 'User ID' with a placeholder 'Please Enter User ID' and 'Password' with a placeholder 'Password'. Below the input fields is a dark blue button labeled 'SIGN IN'. At the bottom of the form, there are two hyperlinks: 'Forgot User ID?' and 'Forgot password?'.

2. Enter the email address associated with your account.



The image shows a 'Reset Password' form. It has a light blue header with the text 'Reset Password' and a question mark icon. Below the header, there is a light blue box containing the following text: '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.' Below this box is an input field labeled '* Email Address' with a red asterisk. To the right of the input field is a red asterisk and the text '* indicates required field'. At the bottom left of the form is a red button labeled 'CANCEL' and at the bottom right is a dark blue button labeled '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.
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

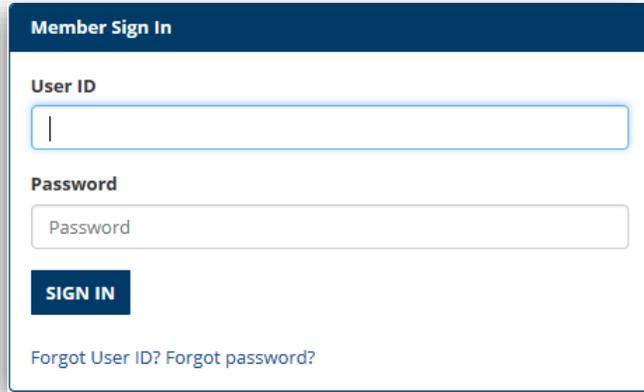
8. On the confirmation page, select the **Continue** button.

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.



The image shows a 'Member Sign In' form. It has a dark blue header with the text 'Member Sign In'. Below the header, there are two input fields: 'User ID' and 'Password'. The 'User ID' field contains a vertical cursor. Below the 'Password' field is a dark blue button with the text 'SIGN IN' in white. At the bottom of the form, there is a link that says 'Forgot User ID? Forgot password?'.

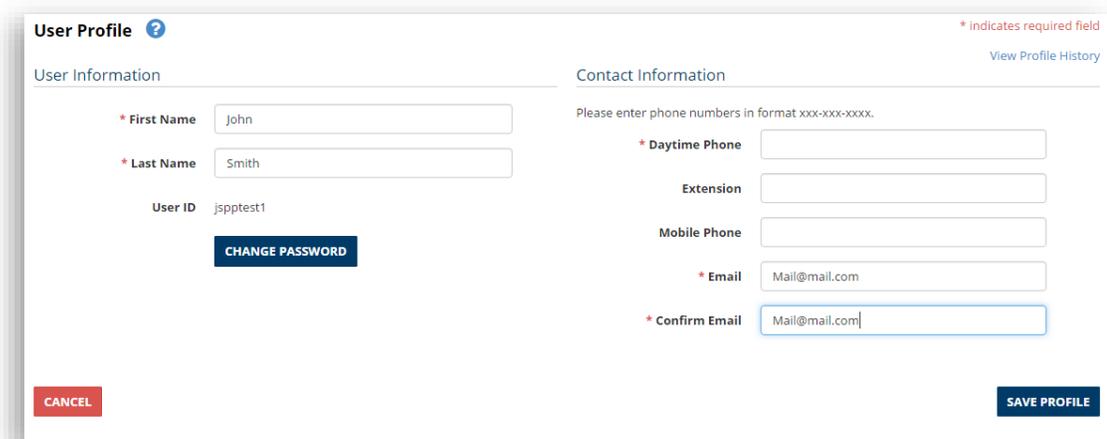
My Profile

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.



The screenshot shows a web form titled "User Profile" with a help icon. It is divided into two main sections: "User Information" and "Contact Information".

User Information:

- * First Name: Input field containing "John".
- * Last Name: Input field containing "Smith".
- User ID: Displayed as "jspptest1".
- A "CHANGE PASSWORD" button is located below the User ID.

Contact Information:

- A note: "Please enter phone numbers in format xxx-xxx-xxxx.".
- * Daytime Phone: Input field.
- Extension: Input field.
- Mobile Phone: Input field.
- * Email: Input field containing "Mail@mail.com".
- * Confirm Email: Input field containing "Mail@mail.com".

At the bottom left is a red "CANCEL" button, and at the bottom right is a blue "SAVE PROFILE" button. A red asterisk indicates required fields. A "View Profile History" link is located in the top right corner.

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
	jsptest2		05/31/2017		Active
	jsptest2		05/31/2017	05/01/2018	Active
	jsptest2		05/31/2017	06/01/2022	Active
	jsptest2		07/01/2017	06/29/2018	Active

Showing 1 to 4 of 4 entries

[H](#) [<](#) [1](#) [>](#) [H](#)



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

User Details ? * indicates required field

[View Profile History](#)

User Information

First Name
Last Name
User ID
Last Logged On 05/31/2017 10:23 AM

Contact Information

Daytime Phone
Extension
Email

Taxpayer Authorizations

Please select the checkboxes in the View column to assign the user read-only access to the selected taxpayers. In order to provide access based on a security template, Please select a template name under the Apply a Template dropdown list. The details of the template will display after selecting it and access can be reviewed by clicking on the Taxpayer Functions and Tax Type Authorizations buttons. In order to manually choose authorizations, Please select Taxpayer Functions and/or Tax Type Authorizations to assign the user additional access to the selected taxpayers. The dropdown value will display Custom to confirm that access was chosen.

View	Taxpayer Name	ID	*Start Date	End Date	Assignments
<input checked="" type="checkbox"/>		XX-XXX8146	05/31/2017	05/01/2018	Authorize Manually: <input type="checkbox"/> TAXPAYER FUNCTIONS <input type="checkbox"/> TAX TYPE AUTHORIZATIONS Or: <input type="text" value="APPLY A TEMPLATE"/>
<input checked="" type="checkbox"/>		XX-XXX6666	05/31/2017	06/01/2022	Authorize Manually: <input type="checkbox"/> TAXPAYER FUNCTIONS <input type="checkbox"/> TAX TYPE AUTHORIZATIONS Or: <input type="text" value="APPLY A TEMPLATE"/>
<input checked="" type="checkbox"/>		XX-XXX9877	07/01/2017	06/29/2018	Authorize Manually: <input type="checkbox"/> TAXPAYER FUNCTIONS <input type="checkbox"/> TAX TYPE AUTHORIZATIONS Or: <input type="text" value="APPLY A TEMPLATE"/>
<input checked="" type="checkbox"/>		XX-XXX6987	05/31/2017		Authorize Manually: <input type="checkbox"/> TAXPAYER FUNCTIONS <input type="checkbox"/> TAX TYPE AUTHORIZATIONS Or: <input type="text" value="APPLY A TEMPLATE"/>

Showing 1 to 4 of 4 entries

[← BACK](#) [SAVE](#)

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.

Authorized Taxpayer Functions ? * indicates required field

Check the check boxes below to enable this user to perform the selected functions on behalf of this taxpayer.

User ID Taxpayer Name

User Name

Assign	Function
<input type="checkbox"/>	Make a Bill Payment

Showing 1 to 1 of 1 entries

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.

User Details ? * indicates required field

[View Profile History](#)

User Information

First Name

Last Name

User ID

Last Logged On 05/31/2017 10:23 AM

Contact Information

Daytime Phone

Extension

Email

Taxpayer Authorizations

Please select the checkboxes in the View column to assign the user read-only access to the selected taxpayers. In order to provide access based on a security template, Please select a template name under the Apply a Template dropdown list. The details of the template will display after selecting it and access can be reviewed by clicking on the Taxpayer Functions and Tax Type Authorizations buttons. In order to manually choose authorizations, Please select Taxpayer Functions and/or Tax Type Authorizations to assign the user additional access to the selected taxpayers. The dropdown value will display Custom to confirm that access was chosen.

View	Taxpayer Name	ID	*Start Date	End Date	Assignments
<input checked="" type="checkbox"/>		XX-XXX8146	<input type="text" value="05/31/2017"/>	<input type="text" value="05/01/2018"/>	Authorize Manually: <input type="button" value="TAXPAYER FUNCTIONS"/> <input type="button" value="TAX TYPE AUTHORIZATIONS"/> Or: <input type="button" value="APPLY A TEMPLATE"/>
<input checked="" type="checkbox"/>		XX-XXX6666	<input type="text" value="05/31/2017"/>	<input type="text" value="06/01/2022"/>	Authorize Manually: <input type="button" value="TAXPAYER FUNCTIONS"/> <input type="button" value="TAX TYPE AUTHORIZATIONS"/> Or: <input type="button" value="APPLY A TEMPLATE"/>
<input checked="" type="checkbox"/>		XX-XXX9877	<input type="text" value="07/01/2017"/>	<input type="text" value="06/29/2018"/>	Authorize Manually: <input type="button" value="TAXPAYER FUNCTIONS"/> <input type="button" value="TAX TYPE AUTHORIZATIONS"/> Or: <input type="button" value="APPLY A TEMPLATE"/>
<input checked="" type="checkbox"/>		XX-XXX6987	<input type="text" value="05/31/2017"/>	<input type="text"/>	Authorize Manually: <input type="button" value="TAXPAYER FUNCTIONS"/> <input type="button" value="TAX TYPE AUTHORIZATIONS"/> Or: <input type="button" value="APPLY A TEMPLATE"/>

Showing 1 to 4 of 4 entries

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

Tax Type Authorizations ? * indicates required field

Check the check boxes below to enable this user to perform the selected functions on behalf of this Taxpayer.

User ID Taxpayer Name
 User Name
 User Authorization Start Date 07/01/2017
 User Authorization End Date 06/29/2018

Assign	Tax Type	Effective Dates	Assigned Function
<input type="checkbox"/>	INSURANCE	Start <input type="text"/> <input type="text"/> End <input type="text"/> <input type="text"/> ADD DATE RANGE	TAX TYPE FUNCTIONS
<input type="checkbox"/>	INTERNATIONAL FUEL TAX AGREEMENT	Start <input type="text"/> <input type="text"/> End <input type="text"/> <input type="text"/> ADD DATE RANGE	TAX TYPE FUNCTIONS

Showing 1 to 2 of 2 entries

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

Tax Type Functions ? * indicates required field

Check the checkboxes below to enable this user to perform the selected tax type functions on behalf of this Taxpayer.

User ID Taxpayer Name
 User Name Tax Type

Assign	Function
<input checked="" type="checkbox"/>	File Forms
<input checked="" type="checkbox"/>	Make Payments

Showing 1 to 2 of 2 entries

- 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.

User Details ?
* indicates required field

User Information

First Name
Last Name
User ID
Last Logged On 05/31/2017 10:23 AM

Contact Information

Daytime Phone
Extension
Email

[View Profile History](#)

Taxpayer Authorizations

Please select the checkboxes in the View column to assign the user read-only access to the selected taxpayers. In order to provide access based on a security template, Please select a template name under the Apply a Template dropdown list. The details of the template will display after selecting it and access can be reviewed by clicking on the Taxpayer Functions and Tax Type Authorizations buttons. In order to manually choose authorizations, Please select Taxpayer Functions and/or Tax Type Authorizations to assign the user additional access to the selected taxpayers. The dropdown value will display Custom to confirm that access was chosen.

View ?	Taxpayer Name ^	ID v	*Start Date v	End Date v	Assignments ?
<input checked="" type="checkbox"/>		XX-XXX8146	05/31/2017 v	05/01/2018 v	Authorize Manually: <div style="display: flex; justify-content: space-between;"> TAXPAYER FUNCTIONS TAX TYPE AUTHORIZATIONS </div> Or: APPLY A TEMPLATE v
<input checked="" type="checkbox"/>		XX-XXX6666	05/31/2017 v	06/01/2022 v	Authorize Manually: <div style="display: flex; justify-content: space-between;"> TAXPAYER FUNCTIONS TAX TYPE AUTHORIZATIONS </div> Or: APPLY A TEMPLATE v
<input checked="" type="checkbox"/>		XX-XXX9877	07/01/2017 v	06/29/2018 v	Authorize Manually: <div style="display: flex; justify-content: space-between;"> TAXPAYER FUNCTIONS TAX TYPE AUTHORIZATIONS </div> Or: APPLY A TEMPLATE v
<input checked="" type="checkbox"/>		XX-XXX6987	05/31/2017 v	v	Authorize Manually: <div style="display: flex; justify-content: space-between;"> TAXPAYER FUNCTIONS TAX TYPE AUTHORIZATIONS </div> Or: APPLY A TEMPLATE v

Showing 1 to 4 of 4 entries

← BACK
SAVE

14. Select the **Save** button.

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

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

Navigation: < 1 >

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).

New User Authorization ? * indicates required field

Please enter the user ID of the user you would like to grant access to.
Note: Authorized Users must already have a valid web portal account.

* User ID

CANCEL **NEXT**

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.

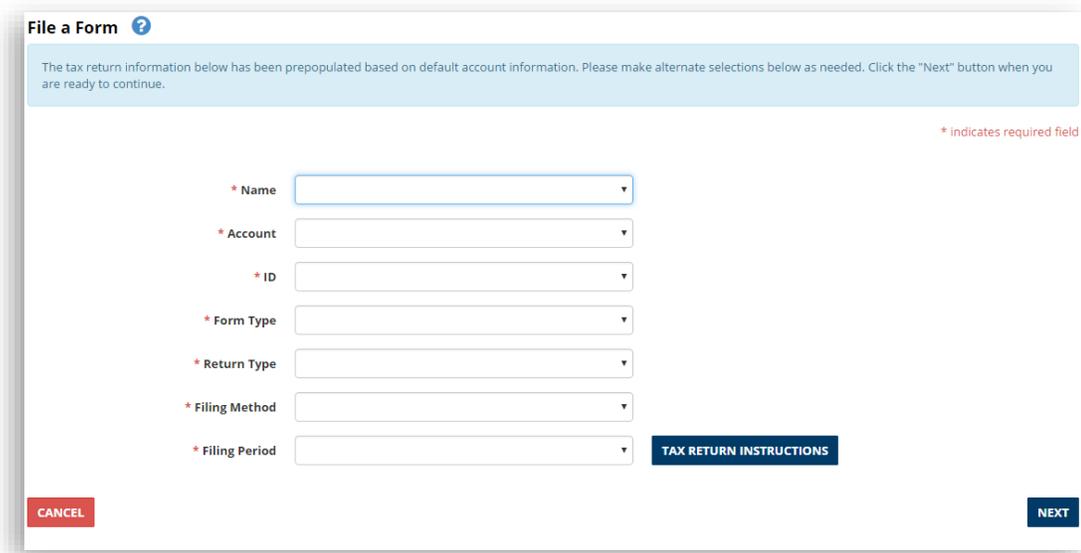
2. Select the business name from the **Name** dropdown for the taxpayer you are filing the return.
3. Select the **Account** for the taxpayer you are filing the return.
4. Select the **ID** for the taxpayer you are filing the return.
5. Select the **Form Type** for the taxpayer you are filing the return.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

Saved Items

This page holds a list of all of the taxpayer's saved items. You can view incomplete documents and transaction history below, or use the search filter to find a specific item.

* indicates required field

Search Filter ?

Incomplete Documents ?

To finish a previously started document, click the Reference Number for the document in the list below.

Form Type	Taxpayer Name	Identifier	Period End Date	Reference Number	Last Activity Date
IFTA-100 - ORIGINAL DOCUMENT					

Showing 1 to 1 of 1 entries

Transaction History ? [VIEW SCHEDULED PAYMENTS](#)

Transaction History

Taxpayer Name	Identifier	Period End Date	Confirmation Number	Payment Amount	Date Submitted	Form Type	Status	Submitter Name

Showing 1 to 1 of 1 entries

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.

The screenshot displays the 'Saved Items' section of a web portal. At the top, a light blue banner contains the text: 'This page holds a list of all of the taxpayer's saved items. You can view incomplete documents and transaction history below, or use the search filter to find a specific item.' To the right of this banner is a red asterisk with the text '* indicates required field'. Below the banner is a dark blue search bar with the text 'Search Filter' and a question mark icon. Underneath the search bar is a section titled 'Incomplete Documents' with a question mark icon. A light blue banner below this title reads: 'To finish a previously started document, click the Reference Number for the document in the list below.' This is followed by a table with the following columns: 'Form Type', 'Taxpayer Name', 'Identifier', 'Period End Date', 'Reference Number', and 'Last Activity Date'. Below the table, it says 'Showing 1 to 1 of 1 entries' and includes navigation buttons (Home, Previous, 1, Next, End). Below this is a section titled 'Transaction History' with a question mark icon and a dark blue button labeled 'VIEW SCHEDULED PAYMENTS'. Underneath is another table with the following columns: 'Taxpayer Name', 'Identifier', 'Period End Date', 'Confirmation Number', 'Payment Amount', 'Date Submitted', 'Form Type', 'Status', and 'Submitter Name'. Below this table, it says 'Showing 1 to 1 of 1 entries' and includes navigation buttons (Home, Previous, 1, Next, End).

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

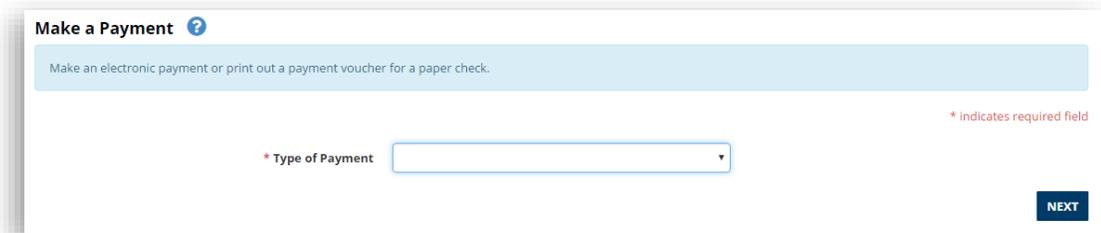
My Payments

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.

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

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

CANCEL **SUBMIT**

8. 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**

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.

The screenshot shows a user interface with a sidebar on the left and a main content area. The sidebar includes a welcome message for Jonathan, a 'User Profile Summary' section, and a 'Taxpayer Information' section with a 'SELECT A TAXPAYER' button. The main content area is titled 'Tax Accounts' and contains a table with 6 columns: Account Type, ID, Address, Last Activity Date, Current Balance, and Last Period Filed. Below the table is a pagination control showing 'Showing 1 to 5 of 6 entries' and a '1 2' indicator. Below the table is an 'Information about Outstanding Debt' section with a light blue background and text explaining that the debts may not represent the true balance. Below that is an 'Outstanding Debts' section with a 'MAKE PAYMENT' button and a table with 4 columns: Account Type, ID, Period End Date, and Balance. Below this table is a pagination control showing 'Showing 1 to 4 of 4 entries' and a '1' indicator.

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

Showing 1 to 5 of 6 entries

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

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

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

The screenshot shows a 'Make a Payment' form. At the top, there is a blue header with the text 'Make an electronic payment or print out a payment voucher for a paper check.' Below this is a red asterisk indicating a required field. The form has a dropdown menu labeled '* Type of Payment' and a 'NEXT' button.

* indicates required field

* Type of Payment

NEXT

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

Make a Payment ?

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

* indicates required field

* Type of Payment ACCOUNT PERIOD PAYMENT ▼

* Taxpayer Name | ▼

* Account ▼

* ID ▼

* Form Type ▼

Filing Period ▼

NEXT

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

ACCOUNT PERIOD PAYMENT ?

< Change Payment Type

* indicates required field

* Payment Amount \$

* Payment Method

CANCEL **NEXT**

- 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.

Saved Items

This page holds a list of all of the taxpayer's saved items. You can view incomplete documents and transaction history below, or use the search filter to find a specific item.

Search Filter

* Indicates required field

Incomplete Documents

To finish a previously started document, click the Reference Number for the document in the list below.

Form Type	Taxpayer Name	Identifier	Period End Date	Reference Number	Last Activity Date

Showing 1 to 1 of 1 entries

Transaction History

VIEW SCHEDULED PAYMENTS

Transaction History

Taxpayer Name	Identifier	Period End Date	Confirmation Number	Payment Amount	Date Submitted	Form Type	Status	Submitter Name

Showing 1 to 1 of 1 entries

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.

Scheduled Payments

View and cancel your upcoming electronic payments.

Search:

Taxpayer Name	Effective Date	Payment Type	Payment	Bank Account Type	Bank Account Number	Confirmation Number	
	06/02/2017	ACCOUNT PERIOD PAYMENT	\$500.00	Business/Corporate Checking	XXXXXX3215	181	
	06/02/2017	ESTIMATED PAYMENT	\$500,000.00	Business/Corporate Checking	XXXXXX3215	184	

Showing 1 to 2 of 2 entries

- 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**

- 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

1



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.

The screenshot shows the 'New Service Request' form in the State of Rhode Island Division of Taxation web portal. The page header includes the state logo and 'Log Out' link. A navigation menu contains 'HOME', 'PROFILE INFORMATION', 'ACCOUNT INQUIRY', 'ONLINE TRANSACTIONS', 'MESSAGE CENTER', and 'SERVICE REQUESTS'. The breadcrumb trail is 'Service Requests / New Service Request'. The main heading is 'Service Request Detail' with a help icon. A red asterisk indicates required fields. The form fields include: 'Request Number' (empty), '* Request Type' (dropdown menu), 'Request Date' (04/23/2019), 'Request Status' (Open), 'Requested By' (empty), '* Reason for Request' (text area), and '* Taxpayer Name' (dropdown menu). At the bottom, there are 'CANCEL' and 'SAVE' buttons. The footer contains 'Rhode Island Division of Taxation. All rights reserved.' and a 'Contact Us' link.

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.

State of Rhode Island
Division of Taxation
DEPARTMENT OF REVENUE

Log Out

HOME PROFILE INFORMATION ACCOUNT INQUIRY ONLINE TRANSACTIONS MESSAGE CENTER SERVICE REQUESTS

Service Requests / Manage Service Requests

Manage Service Requests ?

View or modify existing service requests.

* indicates required field

* Taxpayer Name Service Request Status

SEARCH CLEAR

Request Date	Reason for Request	Type	Status	Taxpayer Name	Tax Account	Requested By
03/12/2019	qwe	CLOSE AN AUTHORIZED TAX ACCOUNT	Open	ROUND AGAIN RE CORDS		
03/12/2019	test	REPORT IDENTITY THEFT	Open	ROUND AGAIN RE CORDS		