



Colorado Revenue Online Instructions for Third Party Access

You may want to allow a relative or tax professional to view your tax account and manage certain aspects of the account, such as file a return on your behalf or research tax payments. To do that, you must log in to your account and add the "third party" to your account.

- 1. You should have already set up a Login ID and Password for your account.*
- 2. Log in to your account in Revenue Online*
- 3. On the left side of the screen, click **My Profile**. You will be on the **Profile** page. This page offers two choices of login types on the left side of the page: Add **Third Party** and Add **New Login***

Third Party Logins

This is for a tax professional, bookkeeper or relative who has their own Revenue Online account.

*With **Third Party Logins**, when the person to whom you gave access logs into their own Revenue Online account, they will see your account information under the tab labeled **Other Taxpayer's Accounts**. The Third Party access requires an existing Revenue Online Login ID.*

New Logins

*This could be used by a business that will have more than one person accessing the business account. There may be more than one person in the office or associated with the account who needs to access the account. NOTE: If you choose the **Add New Login**, the person you are setting up for that does not need to have an existing Revenue Online account. That's because adding a Login is the same as creating a new Login ID and Password for Revenue Online. Therefore, New Login access is similar to the Sign Up process but it is done through the Profile page and Manage Logins in an existing account. You will be asked to create a Login ID and Password for the person to whom you are giving access. If a relative or tax professional does not have a Colorado tax account but you want that person to have access to your account in Revenue Online, you could sign that person up with New Login access.*

*With **New Logins**, the person to whom you gave this access sees only your account information when they log into your Revenue Online account. If that person has been granted access to another person's account information, they must use a separate Login ID and Password to access the other account.*

Login Listings

*In the **Profile** page, under the **Manage Logins** tab (middle of page, within the medium blue bar) the **Logins** tab is the default display. It lists all the Login IDs of persons to whom you have given Third Party or New Login access.*

*The tab labeled **Access to My Accounts** shows account **Names**, **Account Type** (tax type) and **Access Level** that each Login and Third Party in your account.*

The **Settings** tab allows you to indicate whether you will allow others to have login or Third Party Access to your account and you can set the default level of access you will allow.

The tab that is open or that you have clicked on is highlighted in a lighter blue color. The tab **Access to My Accounts** will be there even if you have not yet set up Web Logins to allow others to access your account. It will contain the tax types within your own account that you can access. If you are the only person with access to the account, your Login ID is listed here. When more account access is added, those Web Login IDs will be listed under this tab. Both New Logins and Third Party Logins will appear on this page.

4. Click the link that applies to the Login Access you are setting up. For the purpose of this topic, click **Add Third Party**.
5. The **Third Party Access Information** page appears. This is the page where you select access levels to specific Account Types (individual income, sales tax) within your account. If the only Account Type you have is Individual Income, your entries on this page will apply to that tax. If you have more than one Account Type associated with your Revenue Online account, you will be able to specify access levels for each Account Type after you make the entries required here. This page asks for the following for each Account Type:
 - **What is the Third Party's Login ID?** This is the Login ID established in Revenue Online by the person to whom access to this account will be granted. For example, you want your Tax Professional to have access to your account. Your Tax Professional has set up his own tax account in Revenue Online and his Login ID for that account is 12345a. You will enter 12345a in this Third Party's Login ID box. If the Login ID does not exist in Revenue Online or it is your own Login ID, an error message will be displayed.
 - **When will their access start?** The date format should be MM/DD/YYYY. A calendar is provided to assist in choosing a date.
 - **When will their access end?** This date is not required. If an end date is desired, the format is MM/DD/YYYY, or use the calendar feature.
 - **Access Level (for Tax Type).** The drop-down menu offers these choices:
 - All Access
 - File
 - File & Pay
 - Pay
 - View

6. *If the account has more than one Account (tax) Type, the link **Select Accounts to Give Access To** will appear. Click on the link.*
7. *Click on the boxes that correspond with the Account Types to which you want to allow the person to have access. Then click **OK**.*
8. *If there is only one Account (tax) Type associated with the account, you will not see the link for **Select Accounts to Give Access To**.*
9. *Then click the **Submit** button, either below the final box or on the left side of the screen.*
10. *You will see a message on the screen that says the request for third party login has been received and will be processed momentarily. Click the **OK** button on the left side of the page to return to the **Profile** page.*
11. *When you return to the **Profile** page, click on the tab **Access to My Accounts**. When you click on that tab, you will see the Web Login IDs that have access to this account. The tab **Logins** shows your own login for the account; any other persons who have Web Login access and the type of access (Third party).*
12. *If you have more than one Account Type and you realize later that you want to give the person access to those Account Types, you may do that in the Access to My Accounts tab. The Account Types that do not yet have an Access Level have the link **None** next to them. Click on the **None** link and make your Access Level selection.*

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