



## 1) Can my employee use my company's registration?

No, because the registration is under the individual practitioner and **not** the company.



**2) Is VP registration limited to CPAs, Attorneys or Enrolled Agents? Is a PTIN required?**

No, VP registration is allowed as long the applicant receives compensation to prepare Hawaii Tax Returns and/or works to resolve tax related issues.

### 3) What happened next after submitting application for a verified practitioner?

- 1) Submit the application online or by paper
- 2) Online applicants will be notified by email once the application has been reviewed or approved. Online account is available once the email is received.
- 3) The verified practitioner letter with the V.PID will be mailed to business address the next day after the application is approved.

The letter is also available on online account on the same day.

- 4) If you submit application by paper, you may use the information on the letter to "Sign up" your verified practitioner account online.
- 5) You are ready to request access to you Clients' account (Taxpayers don't have to sign up prior to your request)



## 4) What is a V.P online account?

It is an online account which allows you to view and manage your personal and clients' tax information that you have access to.



## 5) Do my clients have to sign up for an online account?

No, as the new system is integrated, your VP Hawaii Tax Online account allows you access to your client's already existing account.

Therefore, your client need not create an online account unless they want to access his/her own account information.



## 6) Are my clients notified about the online access?

Yes your clients will be mailed a letter to their last known address regarding your access. No action is required from your client as long as the access is accepted.



7) Can more than one VP registered employee gain access to the same client's account?

Yes, multiple VPs can access to the same account.

## 8) Why am I having problems linking my client's account?

*First check the "Search the Tax Licenses "to see if the account number is correct and active.*

*If no license is found, apply for one on HTO or if one exists, link access:*

- ***Using the Letter ID (non license) or***
- ***Self request the letter ID (demo on next slide)***

**Self request letter** - on homepage of Hawaii Tax online, Click "Create Logon", select "Owner of Employee of a business" and do The following.

a)

ID type  
Required

ID  
Required

Country  
USA

Zip  
Required

Are you trying to access a **jointly owned business**? If so, your SSN may be used for the details should be filled out with the business' information.

Are you trying to access a **Single-Member LLC**? If so, your SSN or FEIN may be used for remaining details should be filled out with the LLC's information.

### Validation Question

Select one of the following sources to validate your taxpayer information.

#### Select Validation Method

Select Validation Method  
None of the above

#### Enter Validation Amount

Click here to request a verification letter. A letter ID will be issued and mailed to you.

b)

### Verification Letter

A letter from the Department of Taxation can be used to verify your Hawaii Tax Online account. If you would like to receive a letter for verification, please enter simple letter will be mailed to your address on file.

ID Type  
FEIN

ID  
Required

Required  
Format: 99-9999999

Once the information is put in, click "submit", a letter will be generated and sent to the taxpayer on the next day.

## 9) Tips to request access to a tax account:

- Single member LLC please use FEIN if the entity has updated the information with the Department.
- Please update the Department after obtaining the FEIN from IRS by using the form BB-1 if FEIN is not associated with the GE or TA accounts.
- Please update the ownership the Departments by using the form BB-1 if the information was not provided on BB-1 or whenever there is a change.
- Please update the ID (SSN, FEIN or ITIN) with the Department by using the form BB-1 if that the information was not provided on the form BB-1.
- Don't use License letter ID.
- use one of last three processed payment(minus service fee if submitted from old site)
- use one of the last processed return(note the paper filed return would be delayed in processing)

Another tip for owner's sign up:

- Zip code not matching the systems. To confirm zip code for business owner, please do a search at <https://hitax.hawaii.gov/>

## 10) What do my clients see on the notification letter?

Once you gained access to your clients' accounts online, they will be notified of your access in the mail.

On the letter, it will show:

Tax account(s) being granted access

Practitioner's name

Practitioner's company's name (if updated online)

Department's contact information

# 11) How do I update my company's and address information?

Under "Individuals and Business", click into your practitioner account (with your name).

You may update the information by clicking "Name & Addresses" tab and click the respective fields to add or edit.

The screenshot displays the user interface of the Hawaii Tax Online system. At the top, there is a teal navigation bar with a 'Menu' icon and a 'Home' link followed by a redacted user name. Below this is a secondary teal bar with links for 'Department of Taxation', 'About Hawaii Tax Online', 'Frequently Asked Questions', 'Video Tutorials', and 'Contact Us'. The main content area features a white background with a teal header for the user's profile, labeled 'Representative/Practitioner'. This header includes a 'Settings' button, an 'Alerts' section with a flag icon and a notification that 'There are 21 Unread Messages', and an 'I Want To' section with a 'Send Us a Message' link. Below the profile header, there is a redacted area with a right-pointing arrow and the text 'Balance: \$0.00'. A teal navigation bar below this contains four tabs: 'Submissions', 'Correspondence', 'Names and Addresses' (which is highlighted in red), and 'Logons'. Underneath the 'Names and Addresses' tab, there is another 'Representative/Practitioner' header. To the right of this header is a section titled 'Customer Names & Addresses' with a list of fields: 'Company Name', 'Legal Name', 'Mailing Address', and 'Residential Address'. Each of these fields is followed by a redacted area.



◦ 12) Do I still need a POA when I have online access to my clients' accounts?

Yes, a POA is required if you contact the department requesting actions and/or information which are beyond the scope of the online access.



## 13) Who do I contact if I need assistance to navigate Hawaii Tax Online or if my client access request was denied?

Contact our E-filing section at (808)587-4242 option "Hawaii Tax Online" with the confirmation number of your request, which you may find under "Request" tab.

# 14) Who do I contact if I need assistance to sign up my clients?

Contact our E-filing section at (808)587-4242 option "Hawaii Tax Online" with a POA with the "Support ID" and the session date.

To obtain "Support ID" – stop at where can't move forward - Click 1  – 2."View Support ID" – say yes

**!!! Make sure the email address to receive the "Authentication Code" is inputted correctly!!!**



1  Hawaii Tax Online

2 Home View Support ID

ation | About Hawaii Tax Online | Frequently Asked Questions | Video Tutorials

# 15) If I still can't access or log on?

- Contact Efiling/Hawaii Tax Online at (808)587-4242 (press "Hawaii Tax Online" or
- Use non logon submission feature

The screenshot displays the Hawaii Tax Online interface. On the left, a 'Quick Links' section is visible with the following options: 'File Return', 'Make Payment', 'Reply to Missing Information Letter', and 'Permit Third-Party Access'. On the right, a 'Returns' section lists 'G-26 Use Only', 'G-45 Periodic General Excise/Use', and 'HW-14 Periodic Withholding Tax'. Below these, a navigation bar includes 'Menu', 'Home', and 'Make Payment'. The 'Make Payment' section shows a progress indicator with '1. Payment Introduction' and '2. Payment Detail' (the latter being active). The 'Payment Detail' section is divided into 'Account Information' and 'Payment Information'. Under 'Account Information', there is a text input field for 'Enter your taxpayer name' with a 'Required' label, and a dropdown menu for 'Select the tax account type you would like to pay' also marked as 'Required'.

# 16) What if I'm no longer working with a client?

You may inactive your access by going to "Settings" - "Account Settings" – select the accounts wants to discontinue – "Cancel my access to this account"

Menu [Home](#) » [Logon Settings](#) » **Account Settings** Log Off

Department of Taxation | [About Hawaii Tax Online](#) | [Frequently Asked Questions](#) | [Video Tutorials](#) | [Contact Us](#)

**Account** **Account Settings** **Default Payment Method** Change

Access Level : File and Pay

Cancel my access to this account

My Bank Account

# 17) What if my client wants to disable 3rd party access to their online account?

The taxpayer may call the Department to change the online set up or go to his/her online account and click "Settings" – "Manage Additional Logons" – make "Yes" to "No" under "Accountants or Third Party Logons".

Menu Home » Logon Settings » **Additional Logons** Log Off

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### New Logons

These settings determine if other people can create new logons for you or your business and what level of access they are initially given. If not allowed, new logons will be prevented from registering.

Allow  Yes

Default access [File Returns and Make Payments](#)

### Accountants or Third Party Logons

These settings determine if accountants or third parties can request access to your accounts and what level of access they are initially given. If not allowed, they will be prevented from requesting access to your accounts.

Allow  **← change it to No**

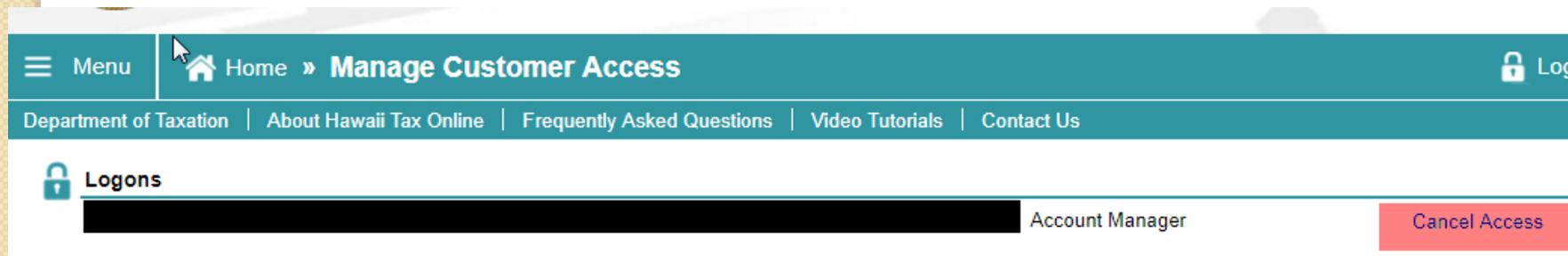
Default access [File Returns and Make Payments](#)

### Logons

	<a href="#">Add</a>
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## 18) How can my clients inactive the 3<sup>rd</sup> party access?

The taxpayer may call the Department to change the online set up or go to his/her online account and click "Logons" - "Manage" – "Cancel Access" for the third party.



The screenshot shows the top navigation bar of the Hawaii Tax Online portal. The main navigation menu includes "Menu", "Home", and "Manage Customer Access". Below this is a secondary navigation bar with links for "Department of Taxation", "About Hawaii Tax Online", "Frequently Asked Questions", "Video Tutorials", and "Contact Us". The "Logons" section is highlighted, showing a "Logons" header with a lock icon, a redacted area, the text "Account Manager", and a red "Cancel Access" button.

Menu | Home » Manage Customer Access | Log

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Logons

Account Manager

Cancel Access

# 19) Why do I only see one period/limited periods while I am supposed to see all periods?

Please fill out the required information. Remove an Account Add an Account

Account ID Information	Validation Method	Validation Information
Account Type Withholding	Select Validation Method Required	
Account ID WH- [REDACTED]		
What's my new ID? Period Range Period Range		
From: Required		
To: Required		

Default to "All Periods" but can be modified to limit the periods

*If the periods are limited and you want to expand the access, you need to re-establish the access- See next page.*

# Do the following:

1. Following the flow chart to get into the screen to cancel access

The screenshot shows the 'Account Settings' page for a taxpayer. The breadcrumb trail is: Home » Taxpayer A. » Specific Account » General Excise (G-45) » Account Settings. The page has three main sections: Account, Account Settings, and Default Payment Method. The 'Account Settings' section contains the following information:

Access Level	: File and Pay
Period From	: 01-Sep-2017
Period To	: 30-Sep-2017

Annotations on the screenshot include:

- Red text: "Click 'Setting' by the man sign to get in" pointing to the gear icon.
- Red text: "1. Check periods" pointing to the date fields.
- Red text: "2. click here to cancel" pointing to the "Cancel my access to this account" link.

2. To "request access to a tax account" on your home page to establish the access again. A notification letter will be mailed to the taxpayer.



## 20) Where do I send the Form N-848 "Power of Attorney"?

File the POA, by faxing it to 587-1488.

However, if your POA is not on file and you have an inquiry into this office, send it to the PPS prior to your call (see the site for contact information).

If the POA need to get attention to a specific agent (collector, auditor and etc), send it to the proper address.



## 21) What do I need to do to see withholding on my practitioner's online account?

You would have to go through the same process to request access to more tax accounts by clicking "Request Access to a Tax Account".

## 22) Edit Submissions when error is made

Submissions are usually be processed

Weekdays between 5:30~6:30pm

Weekends between 4:00~5:00pm

Payments processed Sunday through  
Thursday (bank days)

After a submission is made (except access request and credit card payments etc), if error is found, you may click it to modify.

***!!! Remember to resubmit after editing.***

***!!! If modify the payment, submission date may be changed!***

## 23) Why do I see credit balances on HTO?

*Credit balances may be due to filing/payment errors or overpayments. If this is an overpayment, an amended return may be filed to claim it as a refund.*

*Note: If no request is made, the credit will remain but it may be moved with the filing of the annual return.*

# 24) tips to avoid processing problems.

a) *Due to payments and returns taking longer to post:*

- ▶ *Mail or deliver return and/or payments directly or to the attention of the auditor, collector, or taxpayer services staff (assisting you with a tax clearance, bulk sale, billing etc).*
- ▶ *File and pay electronically (inform the above staff of your filing and/or payment).*

b) *Use the most current version of the Department's form.*

c) *Use correct voucher to make payment (i.e. N-1 for estimated individual) & fill in correct information (i.e G-45 don't write the year end, N-1&N-200V write both spouse's SSN etc)*

d) *Send in complete return (i.e. Sch CR both page 1 & page 2 are required)*

e) *Update Department with the FEIN/ITIN once issued by IRS*

# 25) Updates?

1. Lockbox Ends December 31, 2017.
2. Effective January 1, 2018, filing frequencies for all withholding tax accounts will be quarterly - Tax Act 2017-08 Act 7
3. Temporary rules requires those selected for EFT program to transmit all payments (including annual) for that tax type via EFT. For details, contact our Technical Section at (808)587-1577 .
4. Corporate MEF filing.
5. See revised forms on DOTAX website starting January 3, 2018 (TA forms rate change).
6. Uploading W-2s on HTO will be available. More information to follow.

1. HW-3 for 31-Dec-2016 **2. W-2 Submission Selection**

### W-2 Submission Selection

 **Hawaii W-2 Information**

Before continuing with the return, you are required to enter in your Hawaii W-2 information. Please select how you would like to provide your Hawaii W-2s.

Do you have any Employee W-2s to report?  Yes  No

Method of Submission

*\* You are required to submit a file for W-2 submission. Specifications for filing SSA-EFW2/SSA-EFW2C can be found at <https://www.ssa.gov/employer/>*

 **Attachments**

Type	Name	Size
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