

FAQ: Verified Practitioner Profile – August 19, 2021

Question #1: I've applied as a Verified Practitioner on Hawaii Tax Online. How long will it take for me to receive my Verified Practitioner Identification Number (VPID)?

Answer: Generally, applications take approximately 7 business days to process. If we need additional information from you, we will contact you directly.

Question #2: I've applied as a Verified Practitioner. How will I be notified that my application has been processed?

Answer: If you applied on Hawaii Tax Online, you would receive both an email and a Verified Practitioner Approval Letter in the mail. If you applied by paper Form PPS-12, you would receive a Verified Practitioner Approval Letter in the mail.

Question #3: Where can I find my VPID?

Answer: Your assigned VPID can be found on your Verified Practitioner Approval Letter. Please note, new applicants must wait 24 hours after their application has been processed for their letter to appear on their Hawaii Tax Online account.

- 1) Logon to Hawaii Tax Online
- 2) Find and select your Verified Practitioner profile (T-Number)
- 3) Click the "More" tab
- 4) In the Correspondence Section, click "View Letters"
- 5) Your Verified Practitioner Approval Letter should be displayed
- 6) Click on the "Verified Practitioner Approval" hyperlink

Question #4: Do I have to renew my VPID?

Answer: No, there is no renewal needed.

Question #5: How do I update my profile?

Answer: Update your profile on Hawaii Tax Online.

- 1) Logon to Hawaii Tax Online
- 2) Click on the "Manage My Profile" hyperlink
- 3) Your profile information is displayed, simply click on the applicable hyperlink that you want to change

Question #6: I recently changed employer; do I have to apply for a new VPID?

Answer: No, your VPID belongs to you as a practitioner. Please update your profile (i.e., Company Name) on Hawaii Tax Online account.

- 1) Logon to Hawaii Tax Online
- 2) Find and select your Verified Practitioner profile (T-Number)
- 3) Click the "More" tab
- 4) In the Registration Section, click "Manage Names"
- 5) Your Company Name and Legal Name is displayed, simply click on the applicable hyperlink that you want to change

Question #7: What is the difference between "Master" and "Account Manager" access?

Answer: "Master" access has full authority to make changes on Hawaii Tax Online. "Account Manager" access is limited. As a practitioner, you have "Account Manager" access to client's accounts, meaning your access is limited to mainly filing tax returns and making payments.

Question #8: My Hawaii Tax Online account says "Master," so why I can't change my client's information?

Answer: You have "Master" access to your Verified Practitioner profile, meaning you have full authority to make changes to your profile only.

FAQ: Using Hawaii Tax Online to Service My Client's Account – August 19, 2021

Question #9: How do I get access to my client's account?

Answer: Request access to your client's account.

- 1) Logon to Hawaii Tax Online
- 2) **Find and select your Verified Practitioner profile (T-Number). Scroll down or do a filter search to find your profile. You must click on your name, it's a hyperlink.**
- 3) Click the "More" tab
- 4) In the Access Section, click "Request Access to a Tax Account"
- 5) Click "Next" to start your submission
- 6) Enter your client's information in Taxpayer Details, then click "Next"
- 7) Click on the "Add an Account" hyperlink
- 8) Enter your client's account ID information and choose a validation method, then click "Add"
- 9) Click "Submit" to complete the validation process

Question #10: What information do I need to pass the validation?

Answer: You will need your client's basic tax information. You may choose which validation you want to pass.

Please provide the applicable information for the tax account that you want access to.

- 1) Letter ID for client (the ID of the license letter is not accepted for security reasons, but the ID of the separate welcome letter is okay)
- 2) Payment amount (one of the last 3 tax payments posted)
- 3) Return amount (one of the last 3 tax returns filed)

A payment amount or return amount of zero (0.00) will not validate even if there is a recent return reporting zero liability. If none of the above alternatives works, please contact the Practitioner Priority Office, and fax/email a copy of your POA for further assistance.

Question #11: How will I know that I've been granted access to a client's tax account?

Answer: If you passed the validation, you would gain instant access to your client's account. If you failed the validation, you would receive a rejection email.

Question #12: I passed the validation, when can I access my client's account?

Answer: You will have access immediately.

Question #13: I received an email that I did not pass the validation, what do I do now?

Answer: Verify that you have the correct information for the tax account that you want access to and try again.

Question #14: My client has both a General Excise and Transient Accommodations tax account. After passing the validation, will I get access to both tax accounts?

Answer: No, you must request access to each tax account separately.

Question #15: Can I get "Master" access to my client's tax accounts?

Answer: No, practitioner access is limited to "Account Manager."

Question #16: My client's address changed; can I make the change on Hawaii Tax Online for them?

Answer: No, your access is limited to "Account Manager." An authorized person should complete a Change of Address, Form ITPS-COA.

Question #17: My client wants to close their General Excise tax account; can I close their account on Hawaii Tax Online for them?

Answer: No, your access is limited to "Account Manager." An authorized person should complete a Notice of Cancellation, Form GEW-TA-RV-1.

Question #18: I want to change my client's General Excise tax account filing frequency from monthly to quarterly. Can I do this on Hawaii Tax Online?

Answer: No, your access is limited to "Account Manager." An authorized person should complete a Basic Business Application, Form BB-1 to request the change.

Question #19: I no longer need access to a client. How do I remove my access?

Answer: Cancel access to your client's profile.

- 1) Logon to Hawaii Tax Online
- 2) Go to the client that you wish to cancel
- 3) Click the "Settings" tab - a list of their profile and tax account(s) will be displayed
- 4) The first entry should be the name of the business or individual
- 5) Click "Cancel Access" to remove your access for the whole profile

Question #20: I no longer need access to a client's account. How do I remove my access?

Answer: Cancel access to your client's tax account.

- 1) Logon to Hawaii Tax Online
- 2) Go to the client that you wish to cancel
- 3) Click the "Settings" tab - a list of their profile and tax account(s) will be displayed
- 4) Locate the hyperlink "Cancel Access"
- 5) Click "Cancel Access" for the tax account you want removed