

# Third Party Filers

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GTC Functionality



# Agenda

- GTC Logons
  - Types and Managing Access
- Client's Accounts
  - Adding and Removing Access
- GTC Functionality for Third Party Filers
  - Payment Statement
  - Statement of Account
  - Opt-in/out Notifications for Individuals
  - Document Submission
  - 3<sup>rd</sup> Party Notifications
  - Power of Attorney
- Two Factor Authentication
- G1003 Changes for 2017
- Additional References

# **GTC Logons**

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Types and Managing Access

# Administrator Roles

- An Administrator is the first person that creates a web logon
- Administrators have the ability to:
  - ✓ Add or Inactive Account Managers
  - ✓ Manage Access Settings
    - Allow or disallow new logons
    - Allow or disallow third party logons
    - Remove account access
- Administrators can only be changed by calling the Department at 1-877-423-6711

# Manage Logons

- Logons and access can be managed by logging into GTC, clicking the **Profile Tab** on the **I Want To...** menu and then clicking the **Manage Logons Tab**

I WANT TO...

Profile

[Make Multiple Payments](#)  
[Submit Documentation](#)  
[Submit Power of Attorney](#)  
[Add Access to Another Account](#)  
[Upload File](#)  
[Register New Tax Account](#)  
[Update Officers](#)  
[Bulk Renew Permits](#)  
[3rd Party Notify Options](#)  
[Manage NAICS Codes](#)  
[Request Tax Clearance Letter](#)  
[Request Payment Plan](#)  
[Direct Pay Permit](#)

## PROFILE

Web Name : protaxprep  
Phone 1 : +1 (770) 053-5304  
Phone 2 : +1  
Email : jannel.henderson@dor.ga.gov  
Question : In what city or town did you meet your spouse/signif  
Authentication : Disabled  
E-Correspondence : Disabled

I WANT TO...

Accounts

[Add Access To Another Account](#)  
[Cancel My Online Access](#)  
[Change Password](#)  
[Update Profile](#)

MY ACCOUNTS

OTHER TAXPAYERS' ACCOUNTS

MANAGE LOGONS

LOGONS

MY ACCOUNTS ACCESS

3RD PARTY ACCESS

SETTINGS

CUSTOMER LOGONS

Add Logon

Hide History

Filter



# **Clients' Account(s)**

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Adding and Removing Client's Account(s)

# Add Access to Client's Account

- Once logged into GTC, under the **I Want To...** menu, click the **Add Access to Another Account** hyperlink
  - NOTE: this link is used for adding access to your accounts and adding access to your client's accounts

PROFESSIONAL TAX PREPARATIONS		NAMES AND ADDRESSES		I WANT TO...	Profile
Federal Employer ID #	52-2222222	Legal Name	PROFESSIONAL TAX PREPARATIONS	<a href="#">Make Multiple Payments</a>	
My Balance	\$0.00	DBA Name	PRO TAX PREP	<a href="#">Submit Documentation</a>	
Other Taxpayer Balance	\$142,209.09	Business Location Address	152 LUCKIE ST NW ATLANTA GA 30303-2006	<a href="#">Submit Power of Attorney</a>	
		Mailing Address	Add	<a href="#">Add Access to Another Account</a>	
				<a href="#">Upload File</a>	
				<a href="#">Register New Tax Account</a>	
				<a href="#">Update Officers</a>	
				<a href="#">Bulk Renew Permits</a>	
				<a href="#">3rd Party Notify Options</a>	
				<a href="#">Manage NAICS Codes</a>	
				<a href="#">Request Tax Clearance Letter</a>	
				<a href="#">Request Payment Plan</a>	
				<a href="#">Direct Pay Permit</a>	

# Add Access to Client's Account

- Provide the requested information for the account you want to access
  - Individual Income Tax: SSN, FAGI from last filed return
    - If assisting an individual with creating their own GTC logon, they will need the dollar amount of their last submitted return payment
  - Sales Tax or Withholding: account number, zip code of account location address, last return payment

# Accessing Client's Accounts

- While on the Taxpayer Level, click the **Accounts Tab** → **Other Taxpayers' Accounts Sub-tab**
  - A list of all the clients the logged in profile has access to will be displayed

PROFESSIONAL TAX PREPARATIONS		NAMES AND ADDRESSES		I WANT TO...		Profile
Federal Employer ID #	52-2222222	Legal Name	PROFESSIONAL TAX PREPARATIONS	Make Multiple Payments		
My Balance	\$0.00	DBA Name	PRO TAX PREP	Submit Documentation		
Other Taxpayer Balance	\$142,209.09	Business Location Address	152 LUCKIE ST NW ATLANTA GA 30303-2006	Submit Power of Attorney		
		Mailing Address	Add	Add Access to Another Account		
				Upload File		
				Register New Tax Account		
				Update Officers		
				Bulk Renew Permits		
				3rd Party Notify Options		
				Manage NAICS Codes		
				Request Tax Clearance Letter		
				Request Payment Plan		
				Direct Pay Permit		

  

ACCOUNTS <sup>5</sup>	REQUESTS	E-MESSAGES <sup>1</sup>	LETTERS	CREDITS	EXEMPTION
MY ACCOUNTS <sup>2</sup>	OTHER TAXPAYERS' ACCOUNTS <sup>3</sup>				

  

OTHER TAXPAYERS' ACCOUNTS						Hide History	Filter
Account Id	Account Type	Name	Frequency	Address	Balance		
3000263-RN	Withholding Tax	BUY N LARGE	Quarterly	1110 TOONIGH RD CANTON	0.00		
3000279-PJ	Withholding Tax	R&H CUBE	Quarterly	400 SHALLOWFORD RD NW	142,149.75		
***-**-9008	Individual Income Tax	SARA DIGGLE	Annual	1980 ARROW ST SW ATLANT	59.34		

3 Rows

# Removing Access to Client's Account

- While on the Logon Profile page, click the **Manage Logons Tab** → **3rd Party Access Sub-tab**
- Click the **Access Level** hyperlink next to the applicable account

**PROFILE** | **I WANT TO...** | **Accounts**

Web Name : protaxprep  
Phone 1 : +1 (770) 053-5304  
Phone 2 : +1  
Email : jannel.henderson@dor.ga.gov  
Question : In what city or town did you meet your spouse/signit  
Authentication : Disabled  
E-Correspondence : Disabled

**ADD ACCESS TO ANOTHER ACCOUNT**  
**CANCEL MY ONLINE ACCESS**  
**CHANGE PASSWORD**  
**UPDATE PROFILE**

**MY ACCOUNTS** | **OTHER TAXPAYERS' ACCOUNTS** | **MANAGE LOGONS**

**LOGONS** | **MY ACCOUNTS ACCESS** | **3RD PARTY ACCESS** | **SETTINGS**

**ACCESS TO 3RD PARTY ACCOUNTS** | **Hide History** | **Filter**

Web Logon	Access Type	Name	Account Id	Account Type	Access Level	Active
protaxprep	Third Party	BUY N LARGE	3000263-RN	Withholding Tax	<a href="#">File &amp; Pay (3rd Part</a>	<input checked="" type="checkbox"/>
		R&H CUBE	3000279-PJ	Withholding Tax	<a href="#">File &amp; Pay (3rd Part</a>	<input checked="" type="checkbox"/>
		SARA DIGGLE	***-**-9008	Individual Income Tax	<a href="#">Pay (3rd Party)</a>	<input checked="" type="checkbox"/>

# Removing Access to Client's Account

- Remove the checkmark in the **Active** box
- Click the **Ok** button

**Edit Access Level** ⓘ 🗑️ ✕

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**EDIT ACCESS LEVEL**

protaxprep  
SARA DIGGLE  
Individual Income Tax - \*\*\*-\*\*-9008

Access Level Pay (3rd Party)

Active

Periods this logon has access to:

All Periods

OK Cancel

# **GTC Functionality**

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# GTC Functionality

- View account activity
- View account level letters
- Protest a Proposed Assessment
- Request Waiver of Penalty
- Request a Refund
- Request Change of Filing Frequency
- Request Statement of Account
- Request Payment Statement
- View any request submitted on the client's behalf
- File Returns and/or Make Payments (if access type allows)
- Opt-in/out of Notifications (IIT)

# GTC Functionality

- Additional Functionality includes:
  - Signing up for 3rd Party Notifications
  - Submitting Power of Attorney
  - Submitting Documentation
- 3rd Party Filers cannot:
  - Add or update DBA name or addresses for clients
  - Cannot register accounts for clients

# Payment Statement

- Must be requested for a specific period
- Shows all received payments for that account

## SALES & USE TAX

Federal Employer ID #	54-4444444
Sales & Use Monthly	307-094034
My Balance	<b>\$7,295.92</b>
Pending	\$0.00
Pay Effective Balance	<b>\$7,295.92</b>
Payment Source	<a href="#">Setup</a>

## NAMES AND ADDRESSES

Legal Name	BUY N LARGE
DBA Name	
Business Location Address	1110 TOONIGH RD CANTON GA 30115-8314
Mailing Address	
Site of Business Records Address	

## I WANT TO...

[Profile](#) [Accounts](#)

- [Protest Proposed Assessment](#)
- [Request Statement of Account](#)
- [Request Payment Statement](#)
- [Request Waiver of Penalty](#)
- [Change Filing Frequency](#)
- [Request Refund](#)
- [Make a Payment](#)
- [File Return](#)
- [Manage NAICS Codes](#)

# Statement of Account

- Lists every period where at least a Proposed Assessment has been issued
  - No zero balance periods
  - No periods with liability but no proposed assessment
  - No periods with delinquent returns
- Only goes back 5 years

## SALES & USE TAX

Federal Employer ID #	54-4444444
Sales & Use Monthly	307-094034
My Balance	<b>\$7,295.92</b>
Pending	\$0.00
Pay Effective Balance	<b>\$7,295.92</b>
Payment Source	<a href="#">Setup</a>

## NAMES AND ADDRESSES

Legal Name	BUY N LARGE
DBA Name	
Business Location Address	1110 TOONIGH RD CANTON GA 30115-8314
Mailing Address	
Site of Business Records Address	

## I WANT TO...

[Profile](#) [Accounts](#)

- [Protest Proposed Assessment](#)
- [Request Statement of Account](#)
- [Request Payment Statement](#)
- [Request Waiver of Penalty](#)
- [Change Filing Frequency](#)
- [Request Refund](#)
- [Make a Payment](#)
- [File Return](#)
- [Manage NAICS Codes](#)

# Opt-in/out Notifications (IIT)

- Email notifications whenever:
  - A return is filed with client's SSN
  - A refund issued with client's SSN

INDIVIDUAL INCOME TAX		NAMES AND ADDRESSES		I WANT TO...
Social Security #	***-**-9008	Legal Name	SARA DIGGLE	<a href="#">Protest Proposed Assessment</a>
Individual Income Annual	***-**-9008	Mailing Address	1980 ARROW ST SW ATLANTA GA 30310-5050	<a href="#">Check Refund Status</a>
My Balance	\$59.34			<a href="#">Request Statement of Account</a>
Pending	\$0.00			<a href="#">Request Payment Statement</a>
Pay Effective Balance	\$59.34			<a href="#">Request Waiver of Penalty</a>
Payment Source	Setup			<a href="#">Sign up for Notifications</a>
				<a href="#">Make a Payment</a>

  

PERIODS	REQUESTS	ACTIVITY	E-MESSAGES <sup>1</sup>	LETTERS <sup>1</sup>	CREDITS			
<b>ATTENTION NEEDED<sup>1</sup> ALL PERIODS / PERIOD SEARCH</b>								
PERIODS REQUIRING ATTENTION								
Period	Return Status		Tax	Penalty	Interest	Credits	Balance	Messages
31-Dec-2015	Filed - Late	Pay	3,395.00	44.07	15.27	3,395.00	59.34	<b>Make a Payment</b>

# Document Submission

- Submit Documentation Web Request
  - Use the link on the GTC homepage for clients' account(s)
    - The Submit Documentation link available when logged into GTC is for your own account(s), not your clients'
  - Document Submission Key on letter required
  - Accepted file types: .tif, .jpg, .pdf, .doc, .docx

The screenshot shows the top navigation bar of the GTC website. It features a dark blue background with a light blue accent bar. The navigation bar includes the following elements:

- Quick Links**: A section with a dark blue background and white text.
- Individual**: A section with a dark blue background and white text.
- Business**: A section with a light blue background and white text.
- SIGN UP**: A section with a dark blue background and white text, featuring a pencil icon and the text "Create my username" and "Why create a username?".

Below the navigation bar is a grid of quick links. The "Submit documentation" link is highlighted with a red border.

Quick Links	Individual	Business	SIGN UP
<a href="#">Make a quick payment</a>	<a href="#">License search</a>	<a href="#">Sales tax ID verification</a>	<a href="#">Create my username</a>
<a href="#">Register a new GA business</a>	<a href="#">Exempt Wine Permit for Churches</a>	<a href="#">Sales tax distribution</a>	<a href="#">Why create a username?</a>
<a href="#">Register third party filer</a>	<a href="#">Alcohol retailer set / reset</a>	<a href="#">Wholesaler price postings</a>	
<a href="#">Submit documentation</a>	<a href="#">Transfer Tax Credit</a>	<a href="#">Report Alcohol Citation</a>	
			<a href="#">Protest a proposed assessment</a>
			<a href="#">Appeal to the GA Tax Tribunal</a>
			<a href="#">Request a waiver of penalty</a>

# Document Submission

- Upload File Web Request
  - Link is at Taxpayer Level
  - Sales Tax (XML), Motor Fuel (XML), Federal Format and CSV files for W2s and 1009s, Federal Format and CSV Payments files for Withholding and Corporate, and Filing Frequency Verification
  - <http://dor.georgia.gov/documents/georgia-tax-center-upload-process-manual>

## PROFESSIONAL TAX PREPARATIONS

Federal Employer ID #	52-2222222
My Balance	\$0.00
Other Taxpayer Balance	\$142,567.09

## NAMES AND ADDRESSES

Legal Name	PROFESSIONAL TAX PREPARATIONS
DBA Name	PRO TAX PREP
Business Location Address	152 LUCKIE ST NW ATLANTA GA 30303-2006
Mailing Address	Add

## I WANT TO...

[Profile](#)

- [Make Multiple Payments](#)
- [Submit Documentation](#)
- [Submit Power of Attorney](#)
- [Add Access to Another Account](#)
- [Upload File](#)
- [Register New Tax Account](#)
- [Update Officers](#)
- [Bulk Renew Permits](#)
- [3rd Party Notify Options](#)
- [Manage NAICS Codes](#)
- [Request Tax Clearance Letter](#)
- [Request Payment Plan](#)
- [Direct Pay Permit](#)

# 3<sup>rd</sup> Party Notifications

- 3rd Party Notify Options Request
  - Receive an email notification whenever your client receives an Account Level letter
  - Not retroactive

## PROFESSIONAL TAX PREPARATIONS

Federal Employer ID #	52-2222222
My Balance	\$0.00
Other Taxpayer Balance	\$142,209.09

## NAMES AND ADDRESSES

Legal Name	PROFESSIONAL TAX PREPARATIONS
DBA Name	PRO TAX PREP
Business Location Address	152 LUCKIE ST NW ATLANTA GA 30303-2006
Mailing Address	Add

## I WANT TO...

[Profile](#)

- [Make Multiple Payments](#)
- [Submit Documentation](#)
- [Submit Power of Attorney](#)
- [Add Access to Another Account](#)
- [Upload File](#)
- [Register New Tax Account](#)
- [Update Officers](#)
- [Bulk Renew Permits](#)
- [3rd Party Notify Options](#)
- [Manage NAICS Codes](#)
- [Request Tax Clearance Letter](#)
- [Request Payment Plan](#)
- [Direct Pay Permit](#)

# Power of Attorney

- POA must be on file with DOR in order to call in and discuss an account
  - Federal version and State version are accepted
- Submit for all accounts or some account
  - One attachment will attach to each account selected (make sure PDF covers all accounts, otherwise attach POA for each account)
- Access to the client's account on GTC is not required to submit the POA
- POA does not give GTC access to client's account(s)
- 3rd Party Access via GTC does not allow for the ability to call in and discuss an account

# Power of Attorney Request

- On the Taxpayer Level, under the **I Want To...** menu, click the **Submit Power of Attorney** hyperlink

PROFESSIONAL TAX PREPARATIONS		NAMES AND ADDRESSES		I WANT TO... <span>Profile</span>
Federal Employer ID #	52-2222222	Legal Name	PROFESSIONAL TAX PREPARATIONS	<a href="#">Make Multiple Payments</a>
My Balance	\$0.00	DBA Name	PRO TAX PREP	<a href="#">Submit Documentation</a>
Other Taxpayer Balance	<b>\$142,567.09</b>	Business Location Address	152 LUCKIE ST NW ATLANTA GA 30303-2006	<a href="#">Submit Power of Attorney</a>
		Mailing Address	Add	<a href="#">Add Access to Another Account</a>
				<a href="#">Upload File</a>
				<a href="#">Register New Tax Account</a>
				<a href="#">Update Officers</a>
				<a href="#">Bulk Renew Permits</a>
				<a href="#">3rd Party Notify Options</a>
				<a href="#">Manage NAICS Codes</a>
				<a href="#">Request Tax Clearance Letter</a>
				<a href="#">Request Payment Plan</a>
				<a href="#">Direct Pay Permit</a>

ACCOUNTS<sup>6</sup>

REQUESTS

E-MESSAGES<sup>1</sup>

LETTERS<sup>0</sup>

CREDITS

EXEMPTION

MY ACCOUNTS<sup>2</sup>

OTHER TAXPAYERS' ACCOUNTS<sup>4</sup>

# Power of Attorney Request

- Review Step 1

## 1. Request for Power of Attorney

### Request for Power of Attorney

#### DESIGNATE A POWER OF ATTORNEY



**Determine Your Eligibility**

- You would like to have a qualified professional represent you.
- You are unable to conduct your own affairs due to illness, mental incapacitation, or you are traveling overseas.

OR

- You are a CPA, Tax Preparation Service, Payroll Service or other Accounting Service and need to file a POA for your client.



**Gather Your Information**

- A completed and signed RD-1061 or the IRS 2848 Power of Attorney form which can be obtained using the links on the right.
- Your representative's contact information: name, address, phone number, and email address.
- A list of accounts and periods that your representative is authoritative for.
- When a third party filer submits a POA for a client, the client's primary ID (SSN, ITIN or FEIN) is required.



**Submit Your Request**

➔ [Click here to add power of attorney.](#)

[Click to view form RD-1061](#)

[Click to view IRS form 2848](#)

Cancel

Previous

Next

# Power of Attorney Request

- Select the “Third Party Client Accounts” radio button and enter the client’s FEIN, SSN, or ITIN
  - GTC access to your client’s is not required

1. Request for Power of Attorney

2. Request Details

## Request Details

Power of Attorney will be applied to:

My Accounts

Third Party Client Accounts

Client Information

ID Type

Required



ID

Required

Required

Cancel

Previous

Next

# **Power of Attorney Request**

- Step 3: Enter Contact Information
- Step 4: Enter Address

# Power of Attorney Request

- Select which accounts the POA covers

1. Request for Power of Attorney

2. Request Details

3. Representative Info

4. Representative Address

5. Define Access

## Define Access

All Accounts of Client



From Date



To Date



[Click to view all accounts.](#)

Enter Specific Accounts



Required

- OR -

All Accounts of Client



Enter Specific Accounts



Select	From Date	To Date	Account ID	Account Type	Account Name	
<input checked="" type="checkbox"/>			0062261	Alcohol License	BUY N LARGE	
<input type="checkbox"/>	Required		70090051100	Corporate Income Tax	BUY N LARGE	
<input type="checkbox"/>			911-6678272	Prepaid Wireless 911 Charge	BUY N LARGE	
<input type="checkbox"/>			307-094034	Sales & Use Tax	BUY N LARGE	
<input type="checkbox"/>			0046629	Tobacco License	BUY N LARGE	
<input type="checkbox"/>			3000263-RN	Withholding Tax	BUY N LARGE	

6 Rows

Cancel

Previous

Next

# Power of Attorney Request

- Click the **Add Attachment** tab to save the Power of Attorney form(s) to the web request; Click the **Submit** button



## Attachment for POA Request

Please attach the required POA form.

### ATTACHMENTS

**Add Attachment**



Type	Filename	Size	Description
------	----------	------	-------------

Cancel

Previous

Submit

# **Two Factor Authentication**

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# Two Factor Authentication

- Phone number that accepts Short Message Service (SMS) messaging & provider's name or an email address
  - No International numbers accepted
- Lasts for 1 day unless you request another code
- Use the Trust this Computer checkbox to prevent having to authenticated with each logon
  - Only applies to browser being used when the box was checked
- Issues?
  - Check your spam folder
  - Verify you are checking the correct email address or phone number
  - Make sure that NoReply@dor.ga.gov is not added to your block list
  - Add NoReply@dor.ga.gov to your contacts list
  - Contact Taxpayer Services Division 1-877-423-6711

# **G1003 Changes for 2017**

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# G1003 Changes for 2017

- Due Date Changes for G1003s
  - W2s, 1099MISC NEC, G2FLs – Jan 31st
  - 1099 Other Income – Feb 28th
  - G2As – the 15th of the 3rd month after the end of the filing period (Mar 15th for annual filers)
- Filing G1003
  - Submit **one** G1003 with all W2s, W2Cs, 1099 MISC NECs, and G2FLs. These forms cannot be combined with 1099 Other Income or G2A forms
  - G1003s for 1099 Other Income cannot include any other form types
  - G1003s for G2A Income cannot include any other form types

# G1003 Changes for 2017

- New Upload File options

Select a file to attach ✕

Type	
Description	
	01. Filing Frequency CSV
	02. CSV Payment File
	04. G7 CSV File Upload
	05. G1003 CSV File Upload-Jan
	06. G1003 CSV File Upload-Feb
	07. 1099 (Pub 1220 Format)
	08. 1099 CSV File Upload
	09. W2 CSV File Upload
	10. W2 (EFW-2 Format)
	11. W2C CSV File Upload
	12. W2C (EFW2C Format)
	13. XML ST3 File Upload
	14. XML MFD-04 Eff. 7/2015
	15. XML MFR-21 File Upload
	16. XML MFD-04 File Upload

Required

- New Return List options for Import/Manual Entry

**RETURN LIST**

**RETURN LIST**

Received Date		Return
	File Return	Form G-7
	File Return	Form G1003 Jan
	File Return	Form G1003 Feb

3 Rows

# **Additional References**

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# Additional References

- GTC Reference Guide
  - <http://dor.georgia.gov/documents/gtc-reference-guide>
- Third Party Information
  - <http://dor.georgia.gov/third-party-filers>
- Georgia Tax Information
  - <http://dor.georgia.gov/georgia-tax-center-info>
- Video Tutorials
  - <https://dor.georgia.gov/videos/signup-online-access-business>
  - <http://dor.georgia.gov/videos/how-add-access-another-account>
- Webinars
  - <http://dor.georgia.gov/dor-webinars>

# Contact Information

- CPA Hotline:
  - 404-417-2395
- Email Box:
  - [Revenue.incometaxcpa@dor.ga.gov](mailto:Revenue.incometaxcpa@dor.ga.gov)

# Thank You!

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