Third Party Filers

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
  - 3rd Party Notifications
  - Power of Attorney
- Two Factor Authentication
- G1003 Changes for 2017
- Additional References

GTC Logons

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

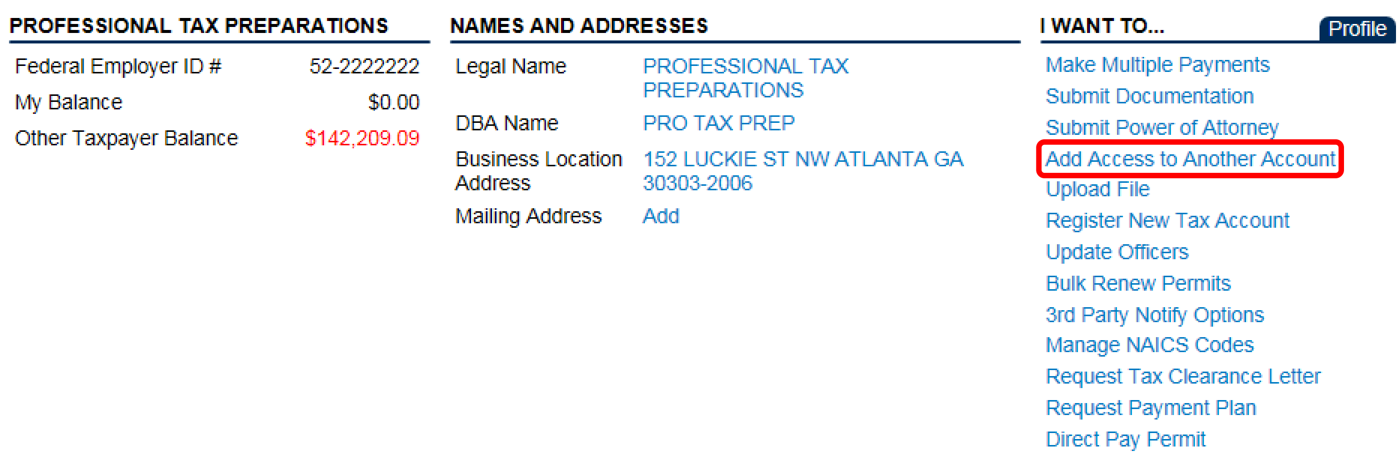
- Logons and access can be managed by logging into GTC, clicking the **Profile Tab** on **the I Want To…** menu and then clicking the **Manage Logons Tab**

Clients’ Account(s)

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

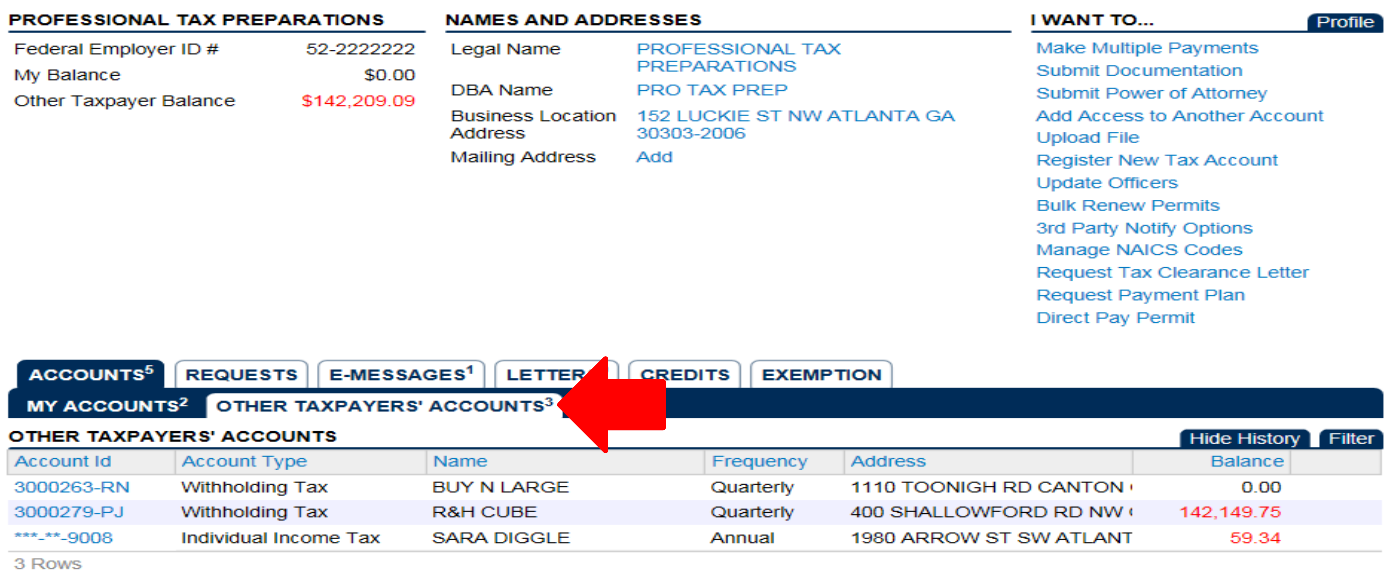


Add Access to Client’s Account

- 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

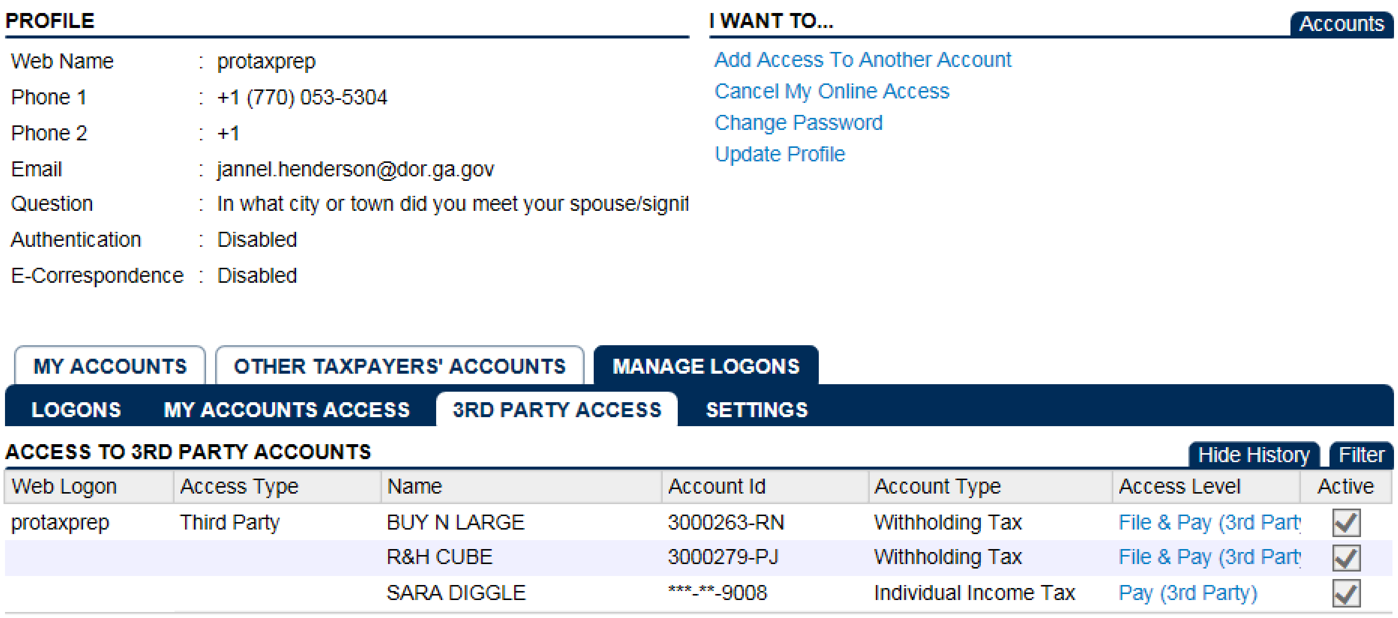
Accessing Client's Accounts

- 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



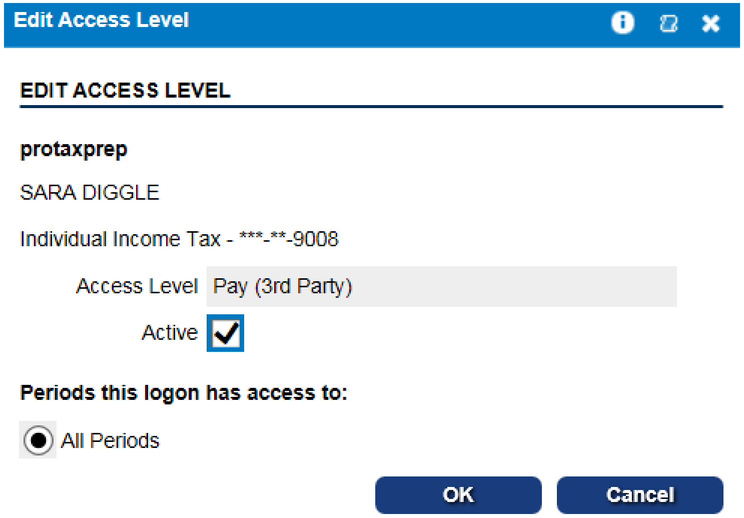
Removing Access to Client's Account

- 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



Removing Access to Client's Account

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



GTC Functionality

GTC Functionality

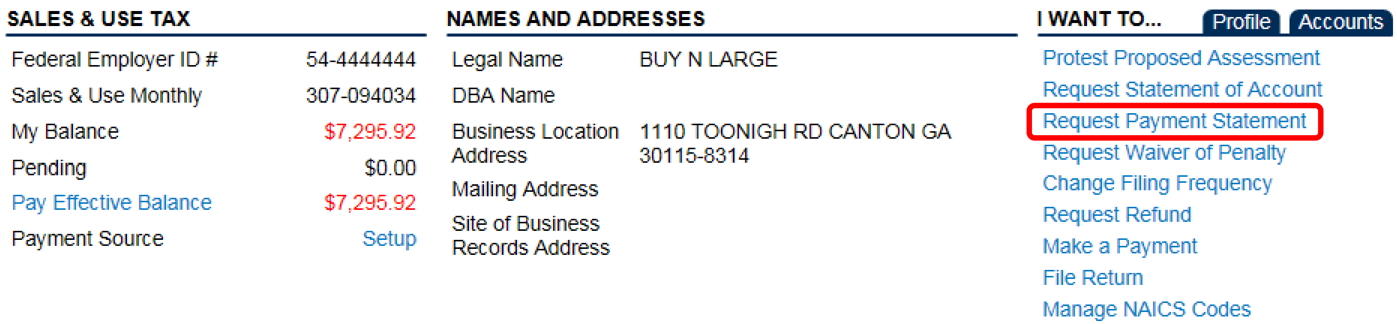
- View account activity
- View account level letters
- Protest a Proposed Assessment
- Request Waiver of Penalty
- Request a Refund
- Request Change of Filing Frequency
- Request Statement of Account
- Request Payment Statement
- View any request submitted on the client's behalf
- File Returns and/or 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



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	$7,295.92
Pending	$0.00
Pay Effective Balance	$7,295.92
Payment Source	Setup

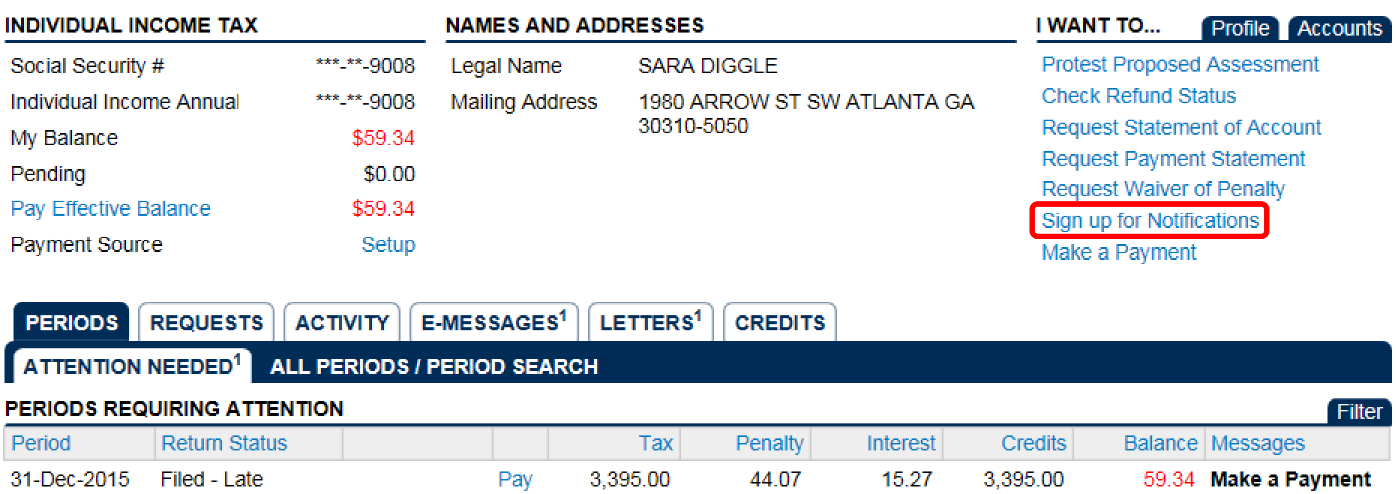
NAMES AND ADDRESSES	
Legal Name	BUY N LARGE
DBA Name	
Business Location Address	1110 TOONIGH RD CANTON GA 30115-8314
Mailing Address	
Site of Business Records Address	

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

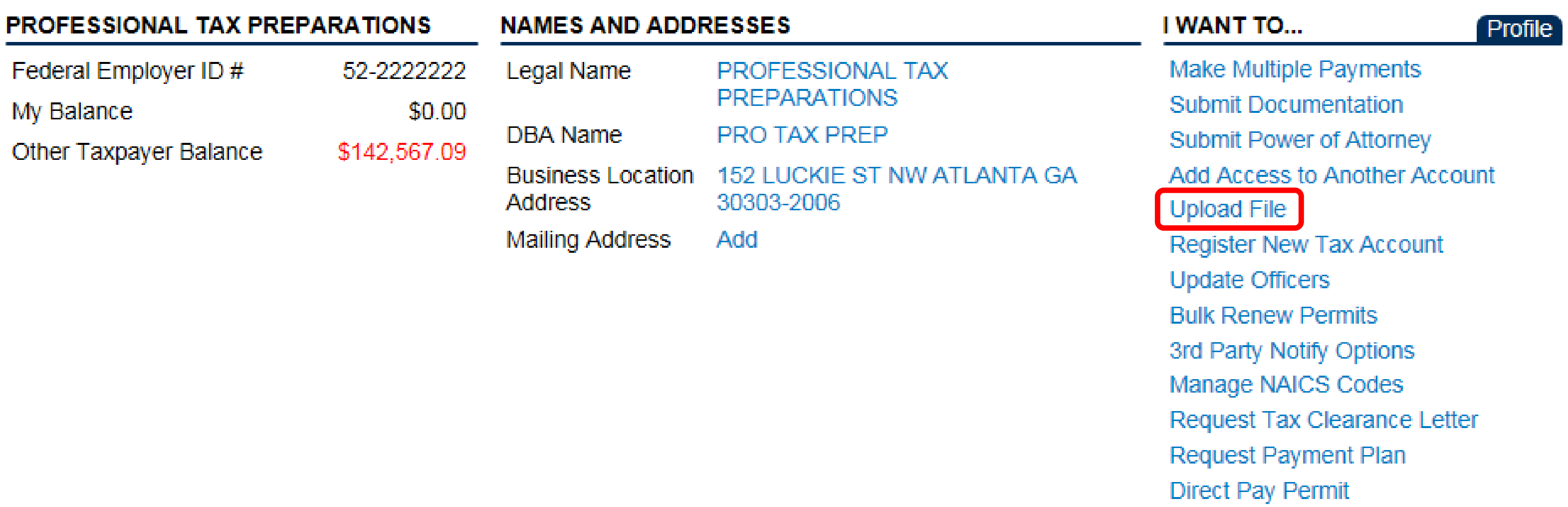


Document Submission

- 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

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



3rd 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

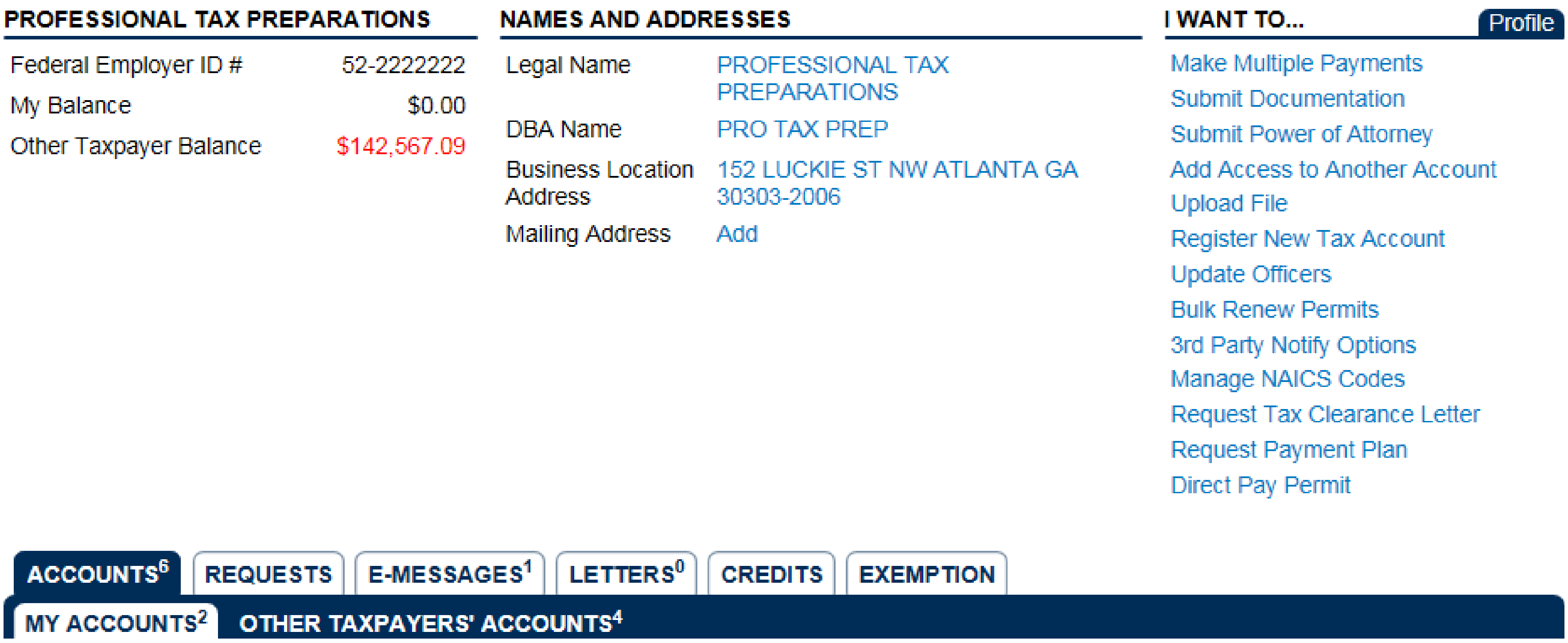
- Make Multiple Payments
- Submit Documentation
- Submit Power of Attorney
- Add Access to Another Account
- Upload File
- Register New Tax Account
- Update Officers
- Bulk Renew Permits
- 3rd Party Notify Options
- Manage NAICS Codes
- Request Tax Clearance Letter
- Request Payment Plan
- Direct Pay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



Power of Attorney Request

- Review Step 1

1. Request for Power of Attorney

Request for Power of Attorney

DESIGNATE A POWER OF ATTORNEY

GA **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.

GA **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.

GA **Submit Your Request**

Click here to add power of attorney.

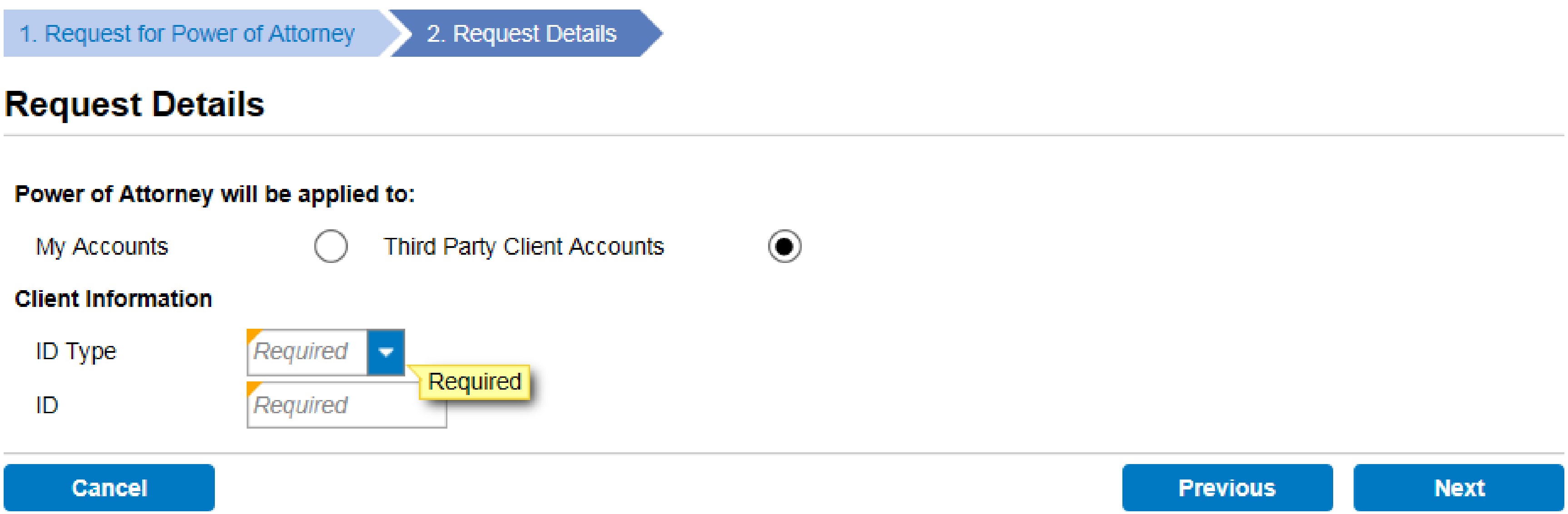
Click to view form RD-1061

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



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 — Required — **Click to view all accounts.**

Enter Specific Accounts

- OR -

All Accounts of Client

Enter Specific Accounts

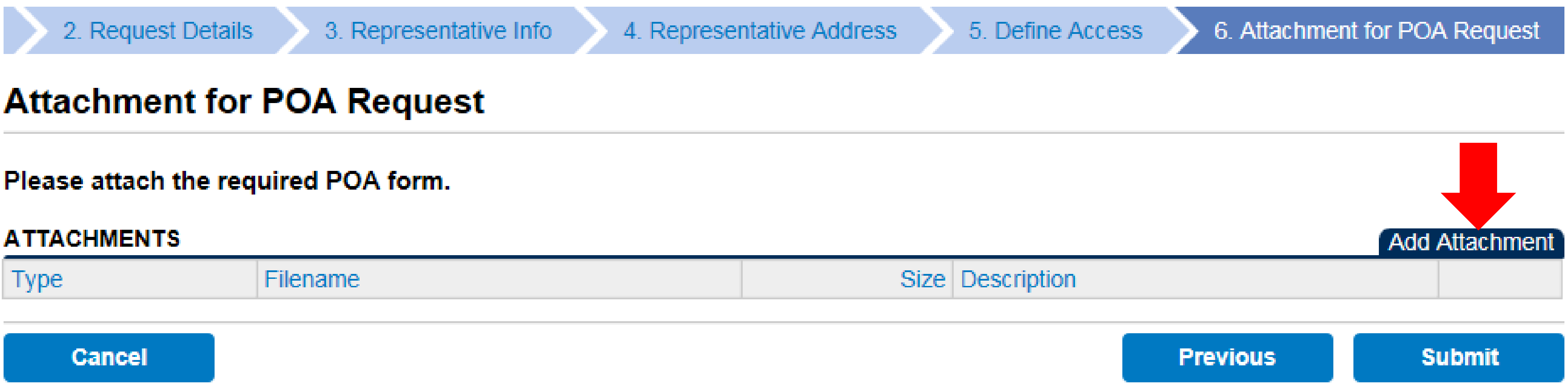
Select	From Date	To Date	Account ID	Account Type	Account Name
☑	Required		0062261	Alcohol License	BUY N LARGE
☐			70090051100	Corporate Income Tax	BUY N LARGE
☐			911-6678272	Prepaid Wireless 911 Charge	BUY N LARGE
☐			307-094034	Sales & Use Tax	BUY N LARGE
☐			0046629	Tobacco License	BUY N LARGE
☐			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



Two Factor Authentication

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

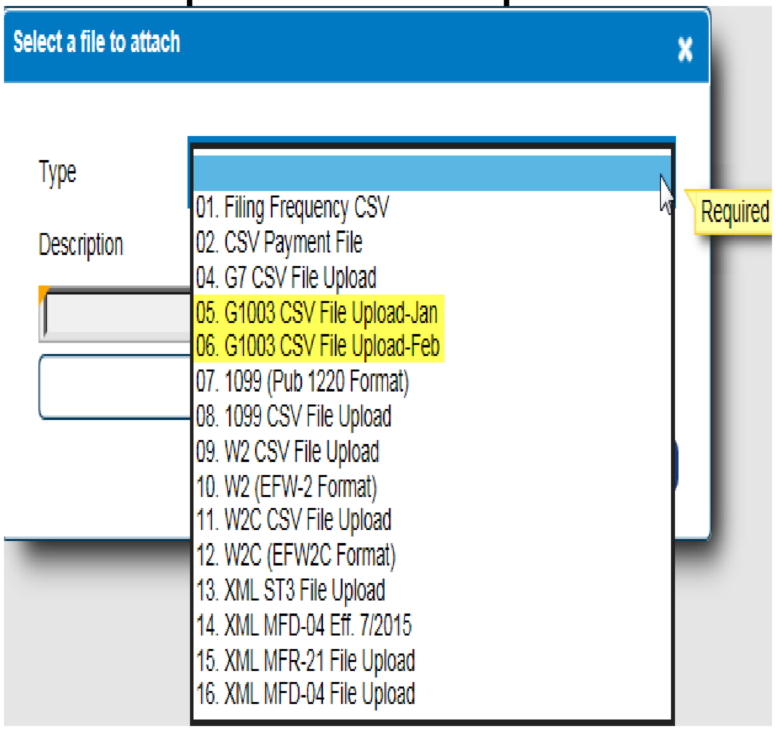
G1003 Changes for 2017

G1003 Changes for 2017

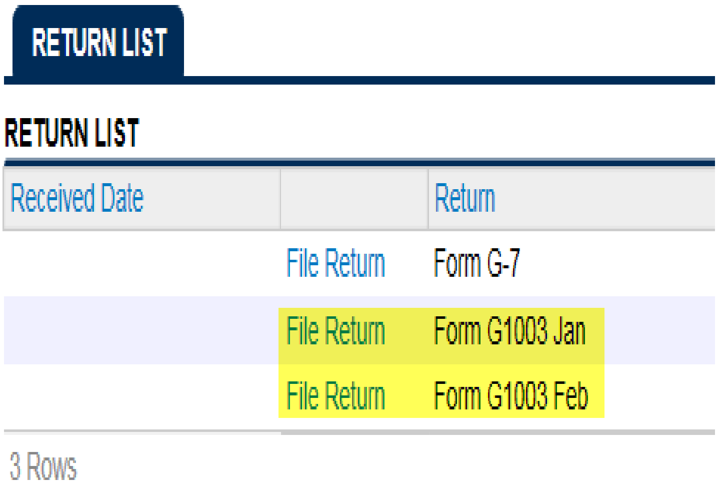
- Due Date Changes for G1003s
  - W2s, 1099MISC NEC, G2FLs – Jan 31st
  - 1099 Other Income – Feb 28th
  - G2As – the 15th of the 3rd month after the end of the filing period (Mar 15th for annual filers)
- Filing G1003
  - Submit **one** G1003 with all W2s, W2Cs, 1099 MISC NECs, and G2FLs. These forms 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



- New Return List options for Import/Manual Entry



Additional References

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

Thank You!