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Request Third-Party Access for Individuals

To request third-party access for an individual, you and your client must have LaTAP accounts. Log in to your LaTAP account. In the I WANT TO... list, click the Request Third-Party Access hyperlink.

1. Requirements Information
   Confirm that you have the required information before you proceed. To proceed, click the Next button.

2. Taxpayer Type
   Select the Individual option for the type of account you would like to add. Then, click the Next button.
3. Taxpayer Information

Complete the **Client Last Name** and **Client SSN** fields. Click the **Next** button.

![Taxpayer Information](image)

4. Review and Submit

Review the information you have entered. Click the **Submit** button.

![Review and Submit](image)

A window is displayed requesting your password to complete the process. Complete the **Password** field and click **OK**.
5. Confirmation
A confirmation window and number are displayed. To print this information, click the Printable View button. Another tab is displayed in your browser.

Your request has been submitted and your confirmation number is 1-649-431-936.

If you have any questions or concerns please contact us at (855) 307-3893, Option #3.

6. Printable View
Right-click in the window and select Print. Print the window.

Click the Close icon in the upper right-hand corner to close the tab you just printed from.

Click the OK button to return to the navigation page.

The taxpayer will receive a letter notifying them of your request to access their account on LaTAP. To complete third-party access requests for the individual, you need the letter ID from the taxpayer. The letter instructs the taxpayer to contact you within 30 days with the letter ID. If the taxpayer fails to contact you within 30 days, you will need to resubmit your request.
Dear Louisiana Taxpayer:

Your tax practitioner has requested access to your individual income tax account through the Louisiana Taxpayer Access Point (LaTAP).

FAKE FIRM
617 N 3RD ST
BATON ROUGE LA 70802-5431
(225) 201-1234
test@test.com

To complete this request, your tax practitioner will need the letter identification number in the top right corner of this letter along with the filing status from your most recent Louisiana Individual Income Tax Return. Granting access to your individual income tax account through LaTAP allows your tax practitioner to view period balances, make payments, request copies of returns, and view letters the Louisiana Department of Revenue (LDR) has mailed to your address.

If you wish to grant third-party access to your account, please contact your tax practitioner to provide the letter identification number & your most recent filing status. Without this information, third-party access to your individual income tax account will not be granted. If you feel you have received this letter in error, you may disregard and destroy this letter. Your account is secure, and you remain the only party with access.

The request for third-party access and this letter identification number will expire thirty (30) days from the date of this notice.

You may contact LDR at 855-307-3893 with any questions.

Respectfully,
Louisiana Department of Revenue
Once you have received the letter ID from your client, click the Request Third-Party Access hyperlink in the I WANT TO... section on the main navigation screen. This process guides you through the same steps you went through before: Requirements Information, Taxpayer Type, Taxpayer Information, and Review and Submit.

1. Requirements Information
   Review the Requirements Information window. Click Next.

2. Taxpayer Type
   Select Individual. Click Next.

3. Taxpayer Information
   Complete the Client Last Name and Client SSN fields. Enter the letter ID the client provided you and the client’s filing status in the appropriate fields. Click Next.

   **Taxpayer Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Last Name</td>
<td>JONES</td>
</tr>
<tr>
<td>Client SSN</td>
<td>*<strong>-</strong>-1618</td>
</tr>
<tr>
<td>Letter ID</td>
<td>1234567890</td>
</tr>
<tr>
<td>Client Filing Status</td>
<td>1. Single</td>
</tr>
</tbody>
</table>

4. Review and Submit
   Review the information on the Review and Submit window. Click Submit.

   **Review and Submit**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Last Name</td>
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</tr>
<tr>
<td>Client Filing Status</td>
<td>1. Single</td>
</tr>
</tbody>
</table>
A new window is displayed requesting your password to complete the process. Complete the **Password** field to confirm your submission. Click **OK**.

A confirmation window is displayed. You now have third-party access to the individual’s account.

**Access Individual Client Accounts**

From the LaTAP homepage, you can access individual client accounts by viewing the **Accounts** tab, and then clicking the **Other Taxpayers’ Accounts** sub-tab. Then, click the account ID hyperlink of the account you wish to view.

**Request Third-Party Access for Businesses**

Requesting third-party access for a business account follows the same process as requesting access for an individual account. Log in to your LaTAP account. Click the **Request Third-Party Access** hyperlink in the I WANT TO... list on the navigation window.

1. **Requirements Information**

   Review the Requirements Information window. Click the **Next** button.
2. Taxpayer Type
Select the Business option. Click the Next button.

3. Taxpayer Information
- Select your client’s account type from the Account Type drop-down field.
- Enter your client’s account number in the corresponding field.
- Enter your client’s ZIP Code in the corresponding field.
- Enter your client’s last payment amount in the corresponding field.
4. **Review and Submit**

Confirm that the information displayed on the Review and Submit window is correct. If it is incorrect, click the *Previous* button to edit your entries. When you have confirmed that the information is accurate, click *Submit*.

A window is displayed requesting your password as confirmation that you wish to submit the request. Complete the **Password** field and click **OK**.
5. Confirmation
The displayed window confirms that your request has been submitted and provides you a confirmation number.
If you would like to print this information, click the Printable View button. If you would not like to print the information, click OK to return to the main navigation window.

Your request has been submitted and your confirmation number is 1-575-851-362.
If you have any questions or concerns please contact us at (855) 307-3833, Option #3.

6. Client Notification Letter
Your client will receive the following letter notifying them that you have provided the information required to have third-party access to their LaTAP business account:
Access Client Business Accounts
You instantly receive access to your clients’ business accounts. To access an account, view the Accounts tab, and then click the Other Taxpayers’ Accounts sub-tab. Click the corresponding account ID hyperlink to view the account.
The Account manager is displayed. From this navigation page, you can file returns, pay, view returns, print returns, view requests, view activity, view notices, view letters, change addresses, view pending payments, and make escrow payments.

Add Firm Information

To add your firm information, click **Change Firm Information** hyperlink in the I WANT TO... list on the navigation menu.

1. **Instructions**

The first stage displays the instructions. Click **Next** to proceed to the next stage.
2. Edit Information
Enter your new Electronic Filing Identification Number (EFIN) and firm name in the corresponding fields. Click Next.

3. Review
Review the window and confirm that the information entered is correct. Click Submit.

A confirmation window is displayed requesting your password as confirmation that you wish to add the information. Complete the Password field and click OK.

A confirmation page is displayed. Click OK to return to the main navigation page.
Edit Firm Information

To change your firm information, click the Change Firm Information hyperlink in the I WANT TO... list on the navigation menu.

1. Instructions
   The first stage displays the instructions. Click Next to proceed to the next stage.

   1. Instructions

   Instructions

   Click “Next” to change or delete the firm information below.

   - Current EFIN: 123456
   - Current Firm Name: NEW FIRM NAME

   Cancel Previous Next

   2. Change Type
   Select the Edit Firm Info option. Then, select the check box(es) that correspond to the information you want to change—the EFIN and/or the firm name. Click the Next button.

   1. Instructions  2. Change Type

   Change Type

   Select what you would like to change below.

   - Remove Firm Info
   - Edit Firm Info

   - Change EFIN
   - Change Name

   Cancel Previous Next

   3. Edit Information
   Enter your new information in the corresponding fields. Click Next.
4. Review

Review the page and confirm that the information entered is correct. Click Submit.

A confirmation window is displayed requesting your password as confirmation that you wish to edit the information. Complete the Password field and click OK.

A confirmation page is displayed. Click OK to return to the main navigation page.

Your request has been submitted and your confirmation number is 1-952-173-440.

If you have any questions or concerns please contact us at (855) 307-3893. Option #3.
Remove Firm Information

To remove your firm information, click Change Firm Information hyperlink in the I WANT TO... list on the navigation menu.

1. Instructions
The first stage displays the instructions. Click Next to proceed to the next stage.

2. Change Type
Select the Remove Firm Info option if you wish to remove your EFIN and firm name. Click Next.

3. Review
Review the page and confirm that the information being removed is correct. Click Submit.
A confirmation window is displayed requesting your password as confirmation that you wish to remove the information. Complete the Password field and click OK.

Please enter your password:

Password

A confirmation page is displayed. Click OK to return to the main navigation page.

Your request has been submitted and your confirmation number is 0-207-342-975.

If you have any questions or concerns please contact us at (855) 307-3693, Option #3.

Update Profile

To update your profile, view the Profile tab in the I WANT TO... section on the navigation menu.

The Profile tab is displayed. Click the Update My Profile hyperlink in the I WANT TO... list.
The Profile window is displayed. You may edit any of the information that is not grayed out. Click **Save**.

### Manage Third-Party Access

To manage third-party access, view the **Profile** tab in the I WANT TO... list on the navigation menu.

The Profile tab is displayed. View the **Manage Logons** tab, and then click the 3rd Party Access sub-tab. Select the access level hyperlink of the desired account to manage your access.
The Edit Access Level window is displayed. Clear the Active check box and click the OK button.

![Edit Access Level Window]

Your third-party access is removed from this account. To regain access, you must navigate through the request process again.

![My Accounts Window]

Update Names and Addresses

1. Legal Name
Click the hyperlink of your legal name in the Names and Addresses list on the Profile navigation window.

![Names and Addresses Window]

The My Accounts window is displayed. View the Edit tab in the top right-hand corner.
Enter your new legal name in the Name field. Click Submit.

A confirmation window is displayed. Click OK return to the Profile navigation window.

2. Addresses
   On the Accounts navigation window, click the hyperlink of your location address in the Names and Addresses list.

The My Accounts window is displayed. View the Edit tab in the top right-hand corner.
Enter your new address in the fields provided. Verify the address by clicking the **Verify Address** hyperlink.

Click the **Select** hyperlink next to the correct address. Click **Save**.

A confirmation window is displayed. Click **OK** to return to the Accounts navigation window.

**Sorting Columns**

To sort by a column in LaTAP, you may click the title of the column. For example, when you click the title of the **Return Status** column, each period is sorted by its return status.
To divide the columns into sortable groups, hold **Shift** on your keyboard and click the column name. For example, holding **Shift** on your keyboard and clicking the title of the **Return Status** column divides all the periods divided by their return statuses.

If you need assistance, please call the Louisiana Department of Revenue’s Customer Service Division at 855-307-3893. Select option 3.