Michigan Treasury Online (MTO) Optimization

Learning Series 3: Selecting a User Role

NOTE: These documents are for demonstration purposes only and are not actual accounts or taxpayers.

June 2016

Customer Friendly

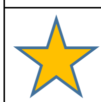
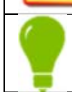
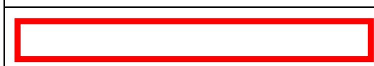
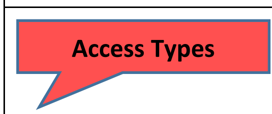
Simplified Process

What's New in MTO?

- **How to Select a User Role**

Learning Series 3: Selecting a User Role (Access Type)

Before continuing, please spend a few minutes becoming familiar with the images used in this Learning Series:

Image	Purpose
	To indicate a change in process or functionally that is expected to significantly increase the user experience
	To indicate a reminder or a relevant note within a text
	To indicate a quick tip or faster way of completing an action
	To number steps on screenshots
	To highlight any part of the screenshot, such as a button
	To draw attention to a relevant section of information/text (not a button)

Old Process	New Process (Effective January 2016)
• Only the business owner can enter into MBOS and give/delegate account access to a 3rd party user (such as a CPA, an Association member, etc.) • As part of the delegation process, the user seeking access will wait up to several days to receive a PIN in the mail	• A 3rd party user (*with the business' permission)* can establish a relationship or (self-delegate) to a business • The delegation process requires less steps due to enhanced shared secret authentication and elimination of sending the one-time access code via paper mail

There is a simplified process for establishing a relationship to a business. ***The <u>first</u> time a user established their first relationship to a business, the user is emailed a one-time access code.*** Going forward, that user will not have to enter an access code if and when establishing a relationship to another business. Anytime a user establishes a relationship to a business, a ***User Role*** must be selected. See ***<u>Learning Series 2</u>*** for more information on established a relationship to a business.

User Roles:

Manage Registration Information- manage rights for business Registration functions only. This role allows a user to electronically add and update business registration information.

Sales Tax- This role allows a user to file, pay, amend, print and view current and previously filed Sales tax returns.

Use Tax- This role allows a user to file, pay, amend, print and view current and previously filed Use tax returns.

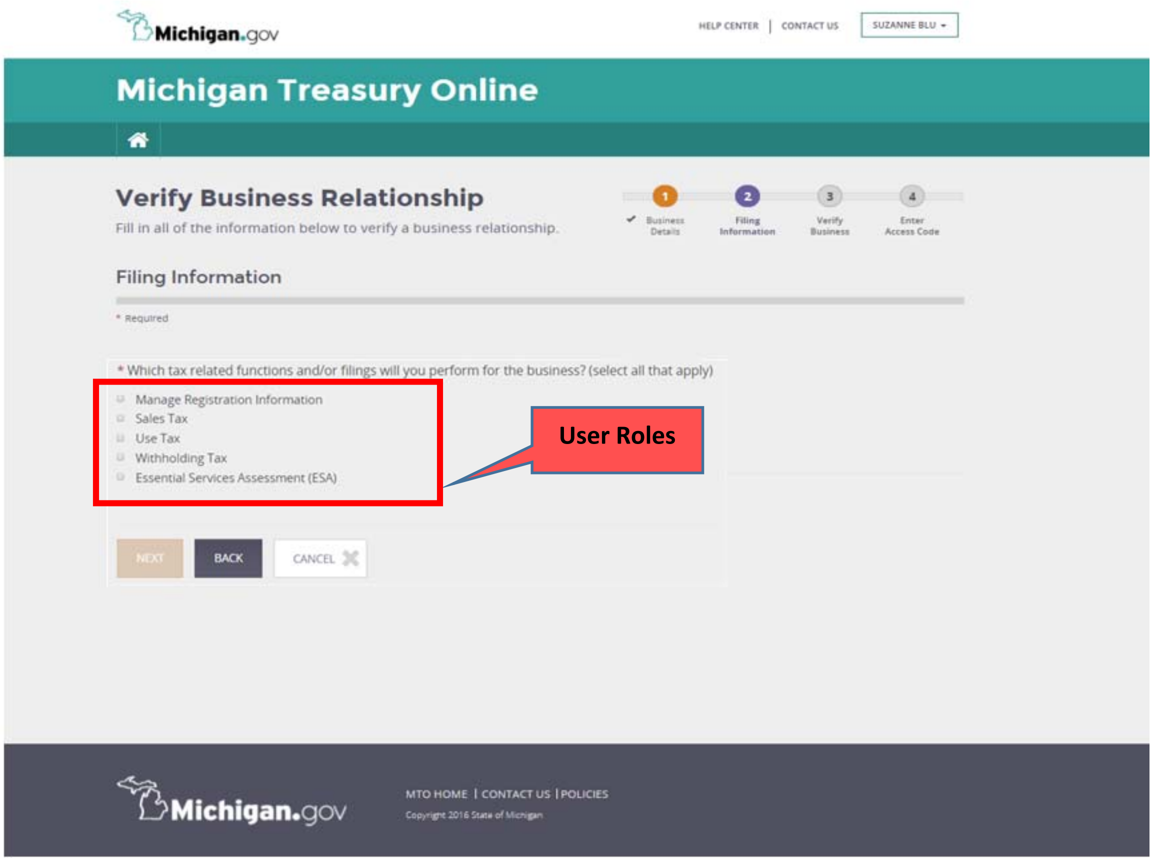
Withholding Tax- This role allows a user to file, pay, amend, print and view current and previously filed Withholding tax returns.

Essential Services Assessment (ESA) – This role allows a user to file and pay ESA tax. ESA is a state-specific tax on eligible personal property owned by, leased to or in the possession of an eligible claimant who has claimed the eligible manufacturing personal property (EMPP) tax exemption. For more information on ESA, visit our website.

Fast File SUW Now – a business relationship is not established therefore shared secret questions are not answered and an access code is not received when a user selects to use Fast File SUW Now.

This is a guest access where no business relationship is established. With Fast File SUW Now, there are limited capabilities; the user is restricted to simply filing and paying a Sales, Use and Withholding tax return. The user is not able to amend, view or print returns.

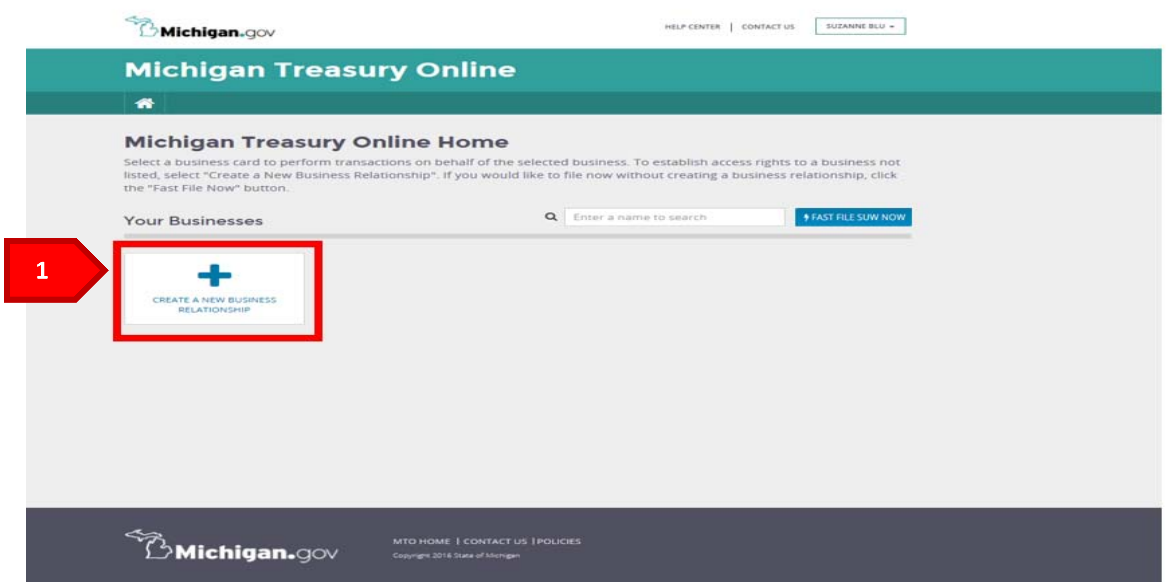
When establishing a relationship to a business, a user has five roles from which to chose.



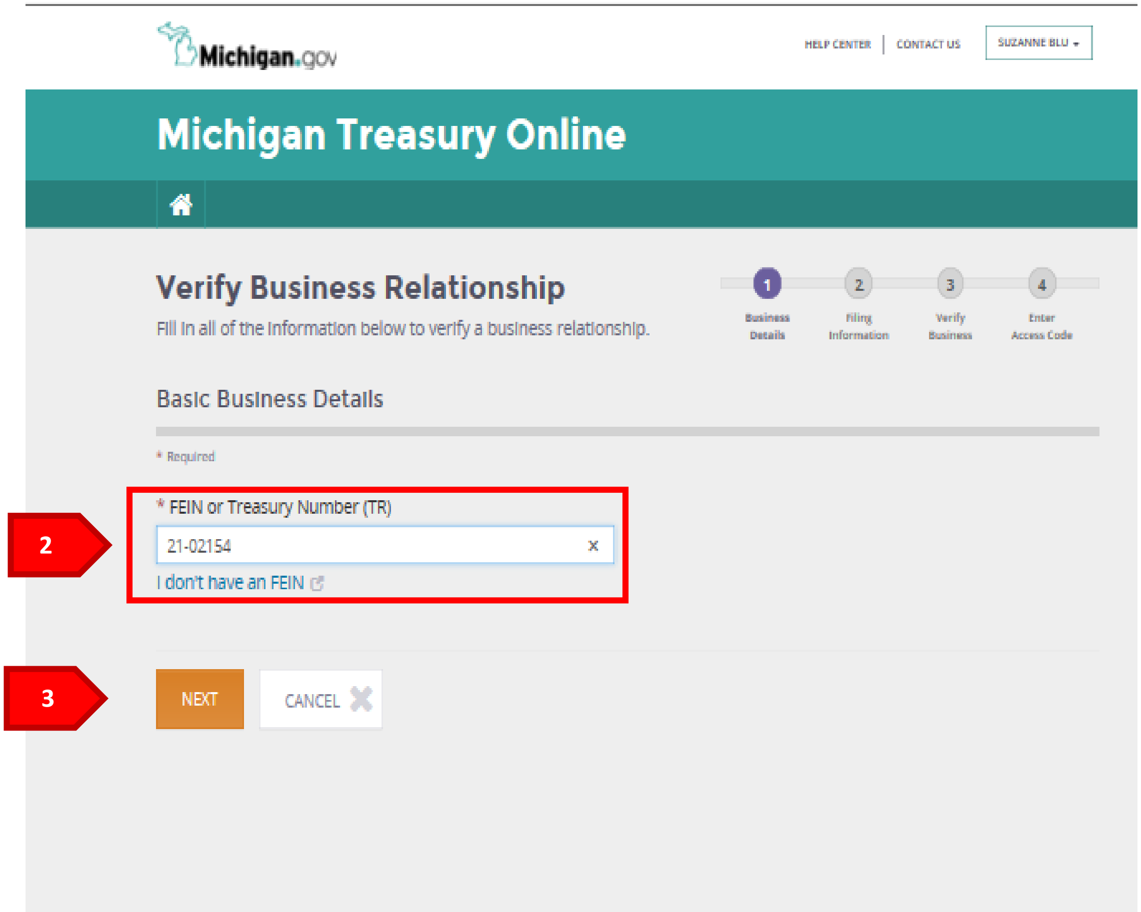
Selecting a User Role When Establishing a Business Relationship:

User Roles have a direct connection to a business relationship and influence the transactions the user can perform for the business. For example, if a user has 5 different businesses added to his/her profile (meaning they have established a relationship with each business), the user may have a different user role for each business.

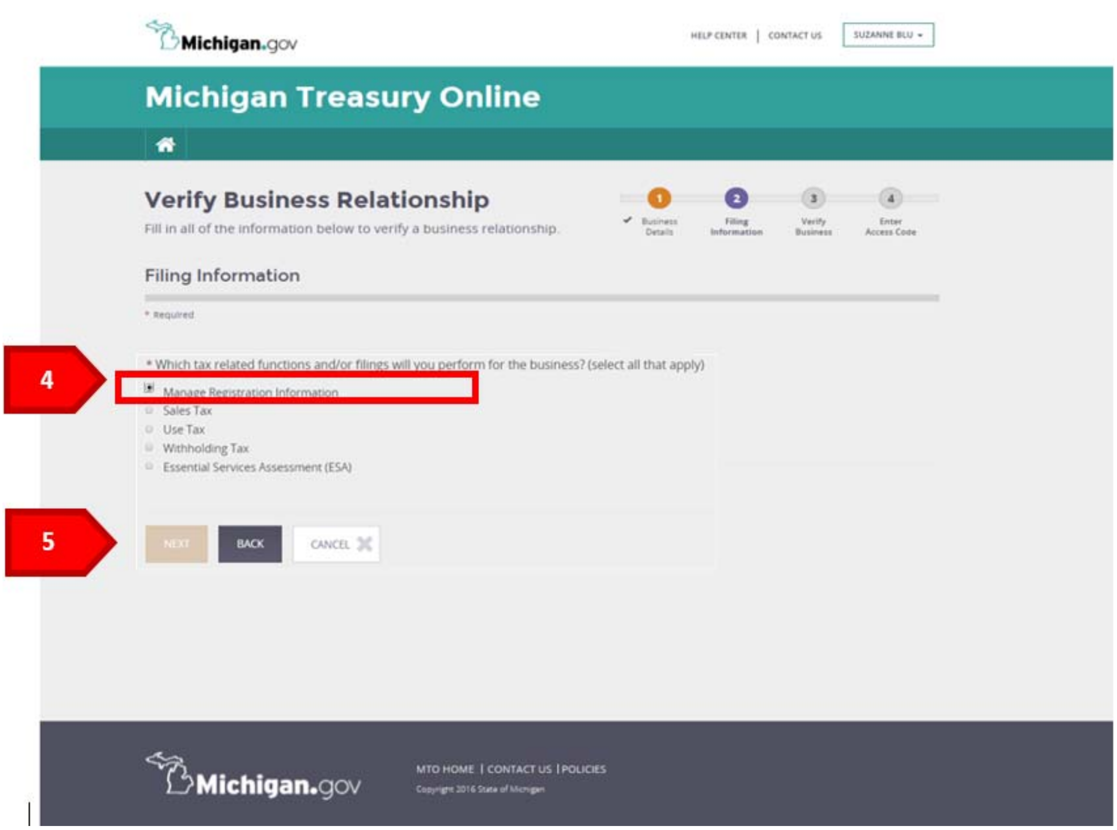
1. Select the **CREATE A NEW BUSINESS RELATIONSHIP** business card on the MTO home page.



2. Enter the **FEIN** or **Treasury Number** of the business.
3. Select the **Next** button.

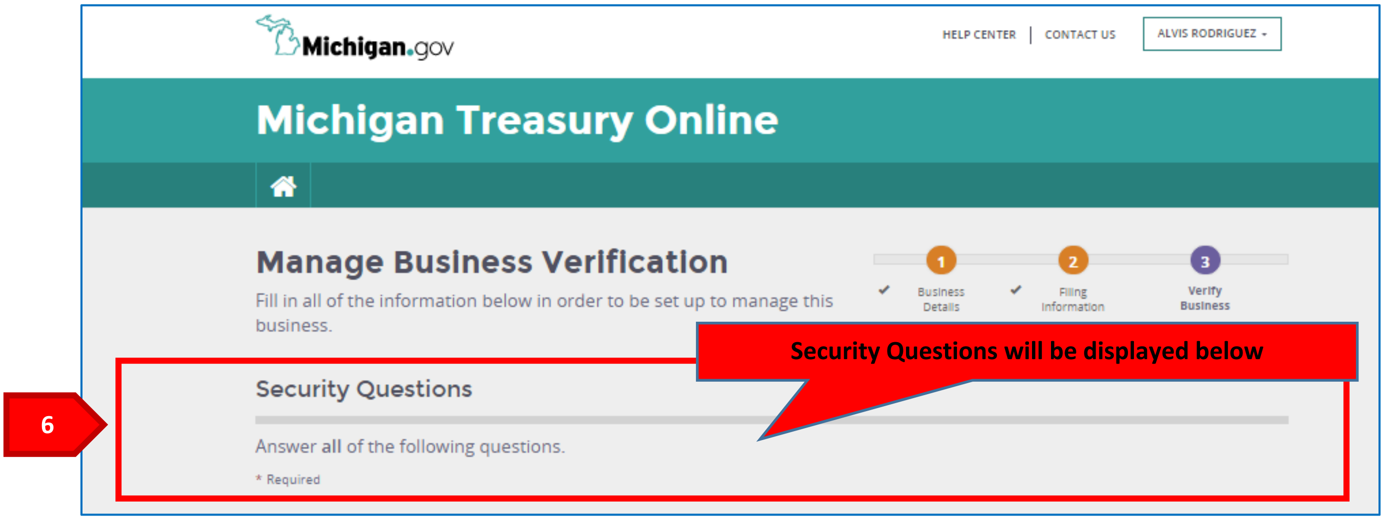


4. Select the **User Role** based on the transactions you want to perform for the business. If Manage Registration information is selected, for example, the user will have access rights to add and update business registration information.
5. Select the **Next** button.



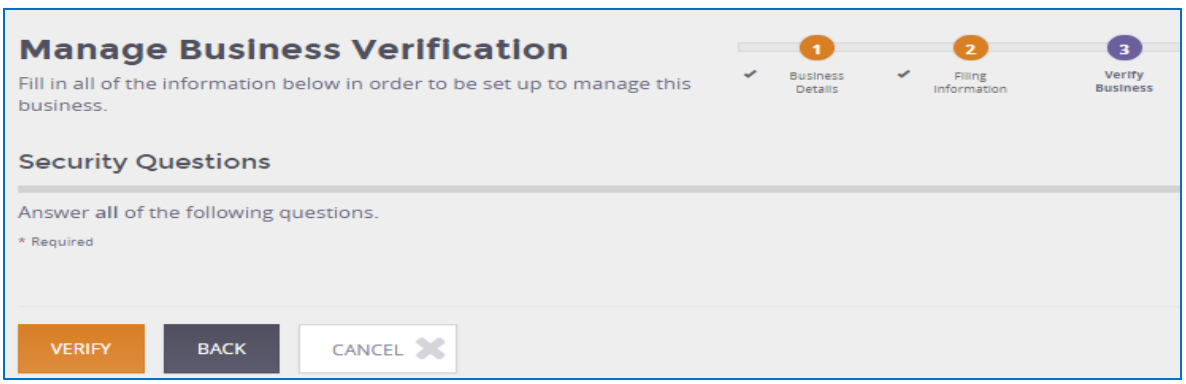
6. Answer the **Security Questions.**

NOTE: If multiple roles are selected, the user may be prompted to answer both business registration and tax related security questions for authentication.

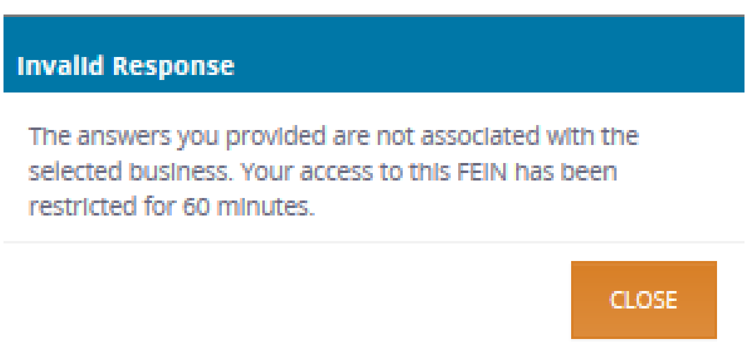


⚠ **Note:** *For security purposes, Verification Questions will not be shown in the Learning Series*

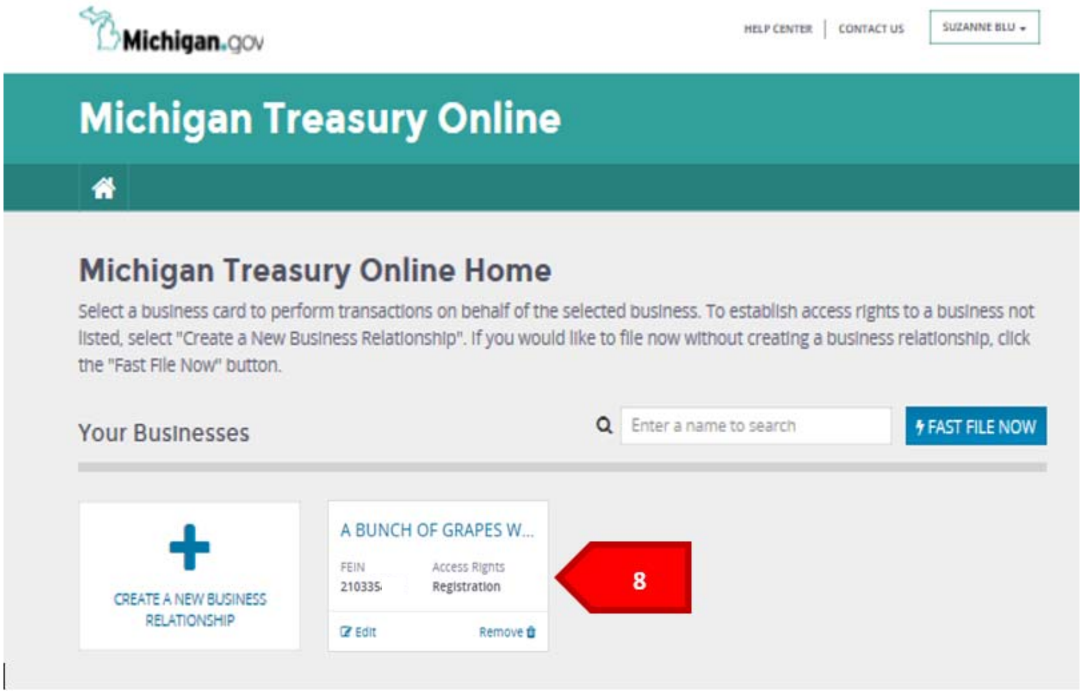
7. Once the security questions have been answered, select **Verify.**



⚠ **Note:** *If your answers are invalid, you will be given this warning message before being locked out of the system for 60 minutes.*

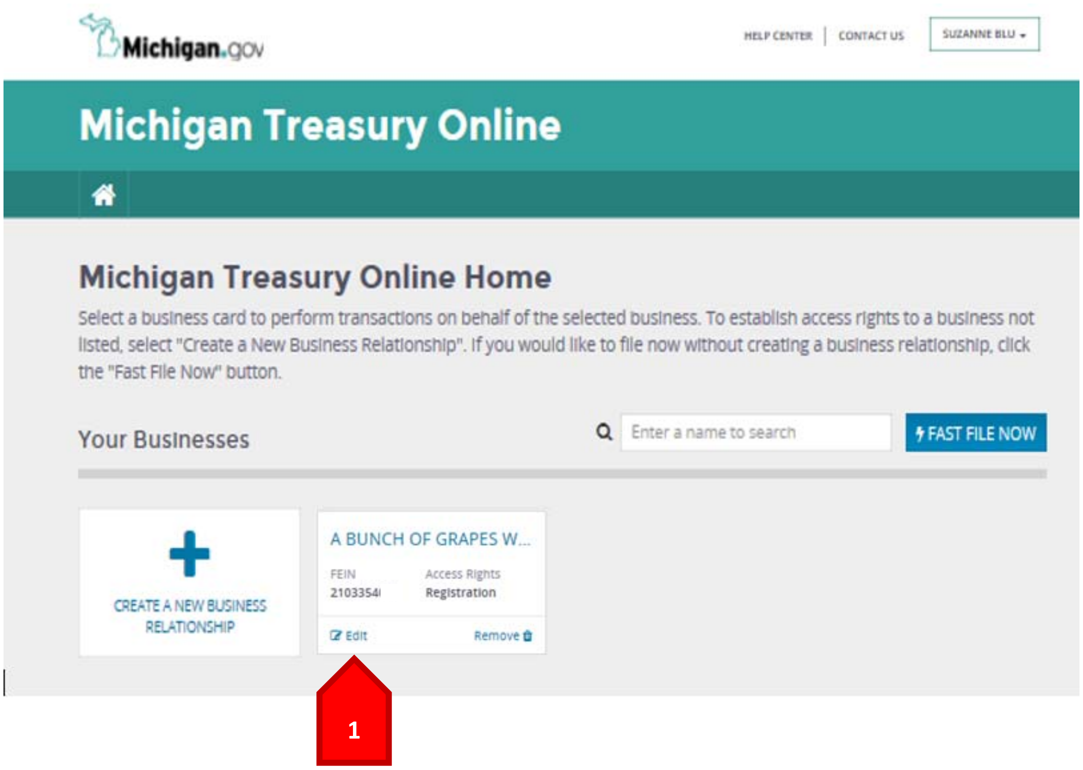


8. If all questions are answered correctly, you will see the new business listed on a business card on your MTO home page. The user's access rights (**Manage Registration Information, for example)** is displayed on the business card.



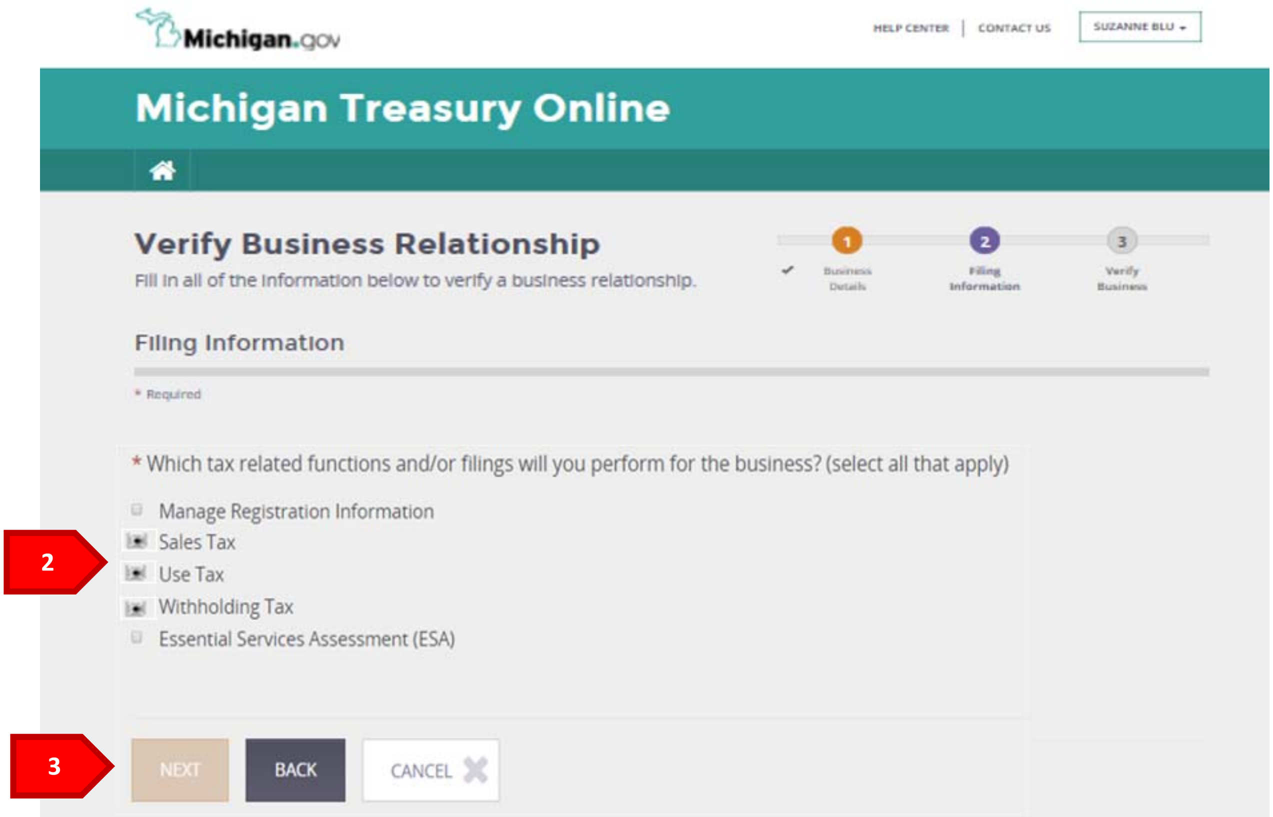
Edit a User Role for an existing business relationship:

1. Select **Edit** on the business card of the associated business

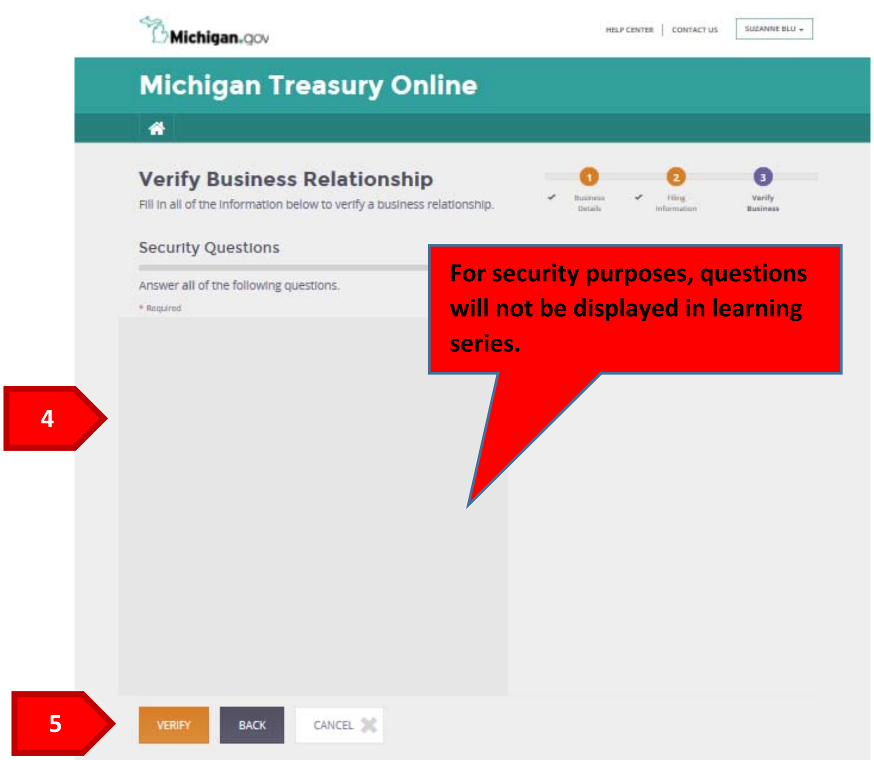


⚠ **Note:** *The user currently has "Manage Registration Information" as the user role. Selecting "Edit" allows the user to change his/her role.*

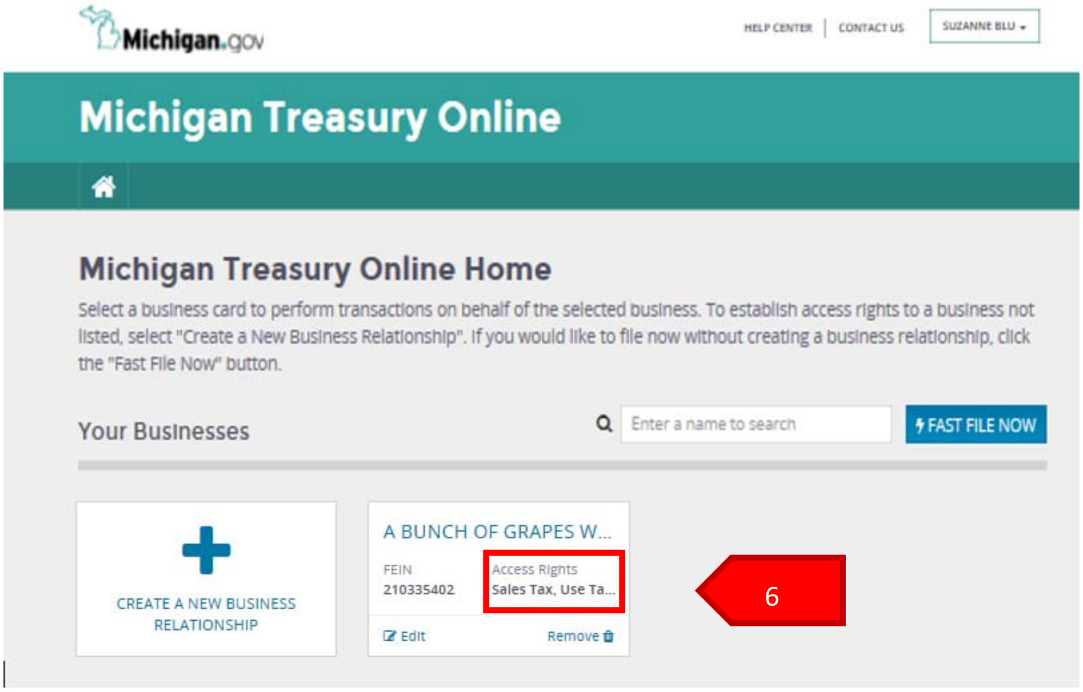
2. Select the desired user role. In this example, the user wants to file and pay **Sales, Use and Withholding Tax.**
3. Select the **Next** button.



4. Answer the **Security Questions.**
5. Select the **Verify** button.



6. The business card of the business will display the updated user role.



⚠ **Note:** *The user now has "Sales, Use and Withholding Tax" as their user role.*

Contact Us

If you have additional questions that were not answered using this Learning Series, please call the Michigan Department of Treasury at 517-636-6925.

The MTO Business website is currently being revised to include updated information on MTO. The website can be accessed here: www.michigan.gov/mtobusiness.