



# Michigan Treasury Online (MTO) Optimization

## Learning Series 4: Manage Business Account Functions

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

April 2016

Customer Friendly

Simplified Process

### What's New in MTO?

- **Functions of Manage Registration Information User Role**

**Learning Series 4 edition on the Functions of Manage Registration Information User Role.**

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)

## Manage Registration Information:

**Manage Registration Information** –manage rights for business Registration functions only. This role allows a user to electronically add and update business registration information. With the manage registration information user role, the user has the ability to navigate through the *Manage Business* menu and the *Letters and Licenses* menu.

- Within the Manage Business menu, you can complete the following transactions:
  1. Change taxpayer data (business name, phone number, number of locations, and tax year end)
  2. Add and update business addresses (legal, physical, location, and mailing)
  3. Add and update representatives (payroll service provider and power of attorney)
  4. Add and update owners, officers, or partners
  5. Add and discontinue tax types
  6. Submit an EFT application for MBT, CIT, and FTW taxes
  7. View delegates
  8. Discontinue the business
  9. Track registration updates



HELP CENTER | CONTACT US

JED BLU ▾

# Michigan Treasury Online



A BUNCH OF GRAPES WINERY - 2103



## A BUNCH OF GRAPES WINERY

### Business Information

Legal Address	FEIN
111 N LINCOLN ROAD ESCANABA, MI 49829	21033
Business Phone Number	Registered Tax Types
	Sales Tax, Use Tax (Sales & Rentals), Withholding Tax

### Available Actions

- ▾ Manage Business
  - Taxpayer Data
  - Addresses
  - Representatives
  - Owners, Officers & Partners
  - Tax Types
  - EFT Application
  - Manage Delegates
  - Discontinue Business
  - Track Updates
- ▶ Letters and Licenses

## Taxpayer Data:

This page allows a user to update taxpayer data such as the business name, business ownership type, business code (NAICS), business phone number, number of locations and tax year end.

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# Michigan Treasury Online

🏠 A BUNCH OF GRAPES WINERY - 210335 ✕

## Taxpayer Data

If you choose to make changes to your taxpayer data, your changes are not saved until you click the "Submit" button.

Some changes you make require approval of the Michigan Department of Treasury before your record is updated.

### Basic Business Details

\* Required

\* Company Name or Owner's Full Name

DBA or Assumed Name

\* Primary Identification Number

SST Number ⓘ

ME Number(s) ⓘ

\* Business Ownership Type

\* Business Code (NAICS) | [Find Code](#) ⓘ

\* Business Phone Number and Extension  
   Ext.

Number of Michigan Locations

Seasonal Filer  
 Check this box if you are a seasonal filer.

Tax Year End

### Available Actions

- ▾ Manage Business
  - Taxpayer Data**
  - Addresses
  - Representatives
  - Owners, Officers & Partners
  - Tax Types
  - EFT Application
  - Manage Delegates
  - Discontinue Business
  - Track Updates
- ▶ Letters and Licenses

## Addresses:

This page allows a user to view, edit, update and delete addresses relating to the business including legal address, mailing address, physical address, and location(s) address.



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# Michigan Treasury Online



A BUNCH OF GRAPES WINERY - 210335



## Addresses

You have the ability to view, edit, update, and delete addresses related to your account.

If you choose to make changes to your taxpayer data, your changes are not saved until you click "Submit".

Some changes you make require approval of the Michigan Department of Treasury before your record is updated.

### Legal Address

The Michigan Department of Treasury will send official notices and communication to this address. It is important that the legal address remain current to assure timely receipt of communication.

An address with a P.O. Box must include a street address.

Legal Address  
111 N LINCOLN ROAD  
ESCANABA, MI 49829

EDIT LEGAL ADDRESS

### Available Actions

▼ Manage Business

Taxpayer Data

Addresses

Representatives

Owners, Officers & Partners

Tax Types

EFT Application

Manage Delegates

Discontinue Business

Track Updates

► Letters and Licenses

### Other

Your address(es) are listed here. This section does not contain the business' legal address.

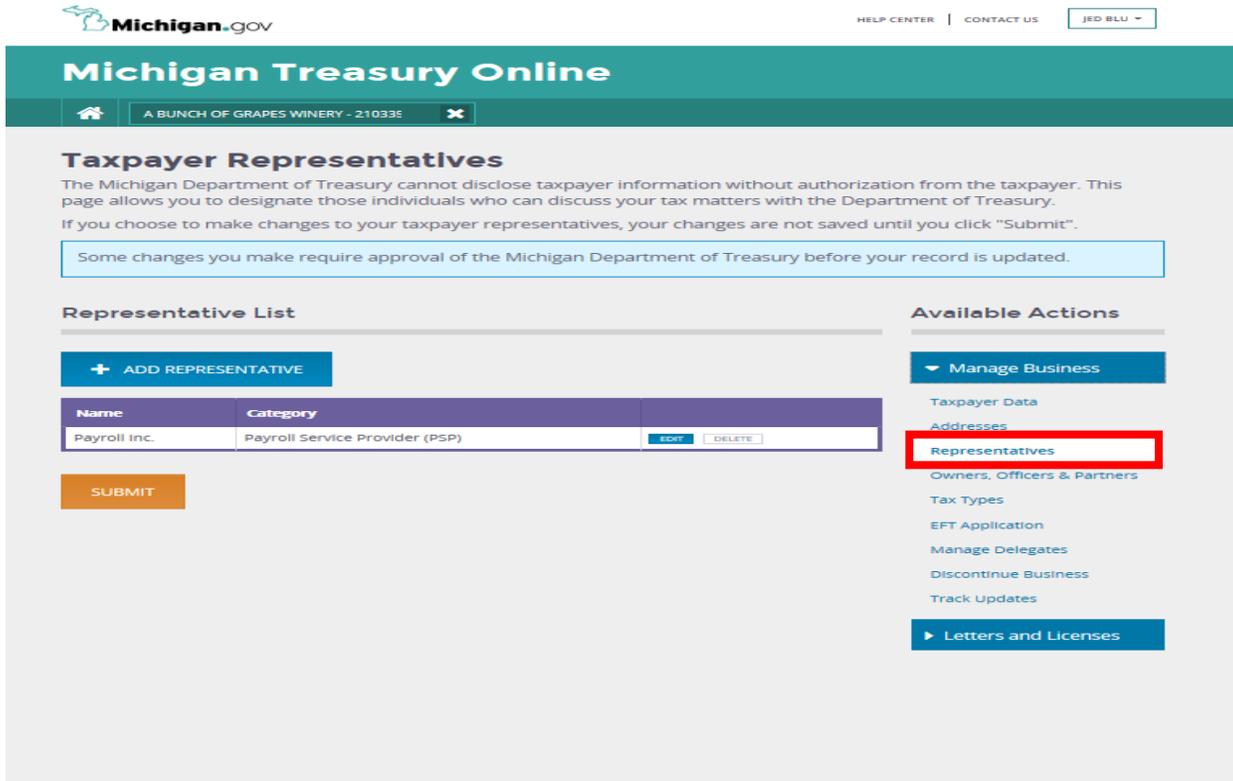
+ ADD ADDRESS

Type	Address	
Locations	111 N Lincoln Rd, Escanaba, MI, 49829-1321	EDIT DELETE
Physical	111 N Lincoln Rd, Escanaba, MI, 49829-1321	EDIT DELETE

SUBMIT

## Representatives:

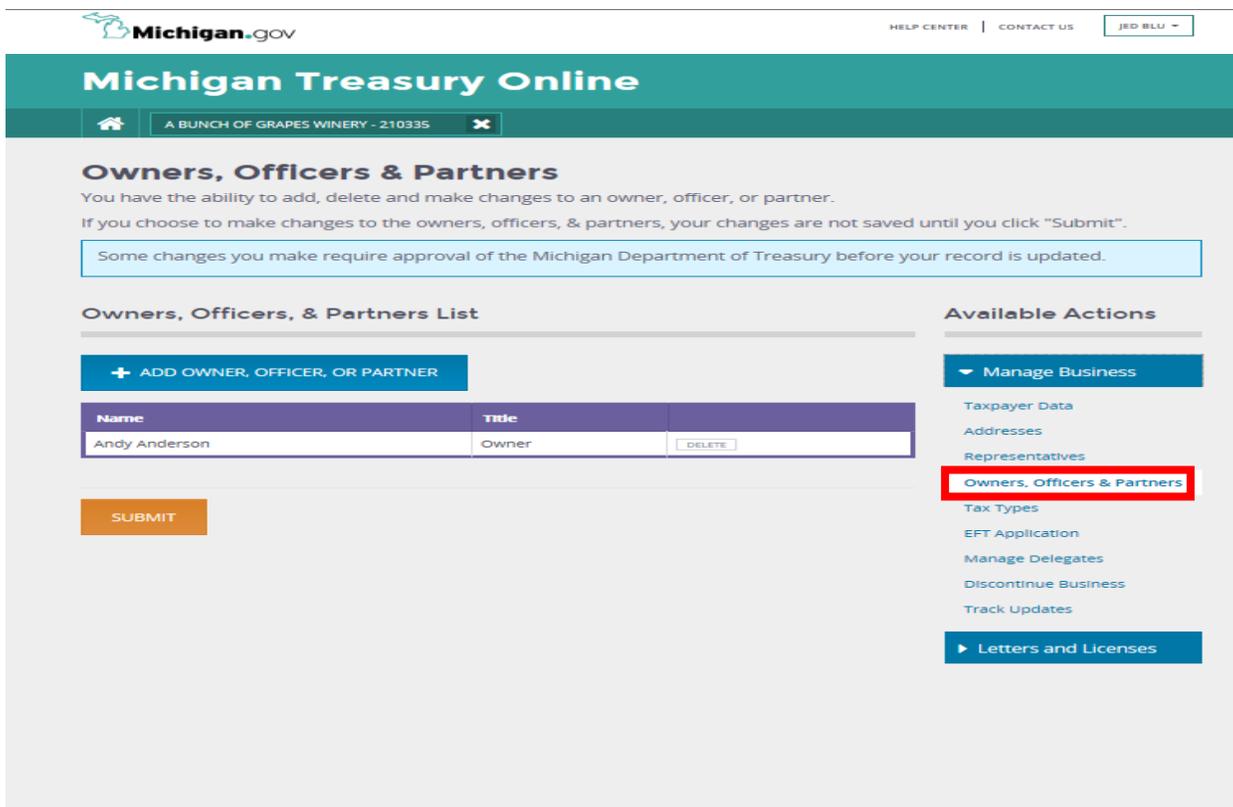
This page allows a user to designate and edit/update designated representatives (including payroll service provider and power of attorney) who can discuss tax matters with the Department of Treasury on behalf of the business.



The screenshot shows the Michigan Treasury Online interface for managing taxpayer representatives. At the top, there is a navigation bar with the Michigan.gov logo, a home icon, the business name 'A BUNCH OF GRAPES WINERY - 210335', and links for 'HELP CENTER', 'CONTACT US', and a user profile 'JED BLU'. The main heading is 'Michigan Treasury Online' followed by 'Taxpayer Representatives'. A notice states that changes require approval from the Michigan Department of Treasury. Below this, there are two main sections: 'Representative List' and 'Available Actions'. The 'Representative List' contains a table with one entry: 'Payroll Inc.' under the 'Category' 'Payroll Service Provider (PSP)', with 'EDIT' and 'DELETE' buttons. A 'SUBMIT' button is located below the table. The 'Available Actions' menu includes 'Manage Business' (expanded), 'Taxpayer Data', 'Addresses', 'Representatives' (highlighted with a red box), 'Owners, Officers & Partners', 'Tax Types', 'EFT Application', 'Manage Delegates', 'Discontinue Business', 'Track Updates', and 'Letters and Licenses'.

## Owners, Officers & Partners:

This page allows the user to add, delete and edit an owner, officer or partner of the business.



The screenshot shows the Michigan Treasury Online interface for managing owners, officers, and partners. At the top, there is a navigation bar with the Michigan.gov logo, a home icon, the business name 'A BUNCH OF GRAPES WINERY - 210335', and links for 'HELP CENTER', 'CONTACT US', and a user profile 'JED BLU'. The main heading is 'Michigan Treasury Online' followed by 'Owners, Officers & Partners'. A notice states that changes require approval from the Michigan Department of Treasury. Below this, there are two main sections: 'Owners, Officers, & Partners List' and 'Available Actions'. The 'Owners, Officers, & Partners List' contains a table with one entry: 'Andy Anderson' under the 'Title' 'Owner', with a 'DELETE' button. A 'SUBMIT' button is located below the table. The 'Available Actions' menu includes 'Manage Business' (expanded), 'Taxpayer Data', 'Addresses', 'Representatives', 'Owners, Officers & Partners' (highlighted with a red box), 'Tax Types', 'EFT Application', 'Manage Delegates', 'Discontinue Business', 'Track Updates', and 'Letters and Licenses'.

## Tax Types:

This page allows a user to add a new tax type and discontinue an existing tax type.

The screenshot shows the Michigan Treasury Online interface. At the top, there is a navigation bar with the Michigan.gov logo, a user profile 'JED BLU', and links for 'HELP CENTER' and 'CONTACT US'. Below this is a teal header with 'Michigan Treasury Online' and a breadcrumb trail 'A BUNCH OF GRAPES WINERY - 210335'. The main content area is titled 'Tax Types' and includes a sub-header 'Tax Types List' with a '+ ADD TAX' button. A table lists three tax types: Sales Tax, Use Tax, and Payroll and Pension Withholding Tax, each with an 'EFFECTIVE DATE' of January 1, 2015 and a 'DISCONTINUE' button. To the right, an 'Available Actions' menu is shown, with 'Tax Types' highlighted in a red box. Other actions include 'Manage Business', 'EFT Application', 'Manage Delegates', 'Discontinue Business', 'Track Updates', and 'Letters and Licenses'. A 'SUBMIT' button is located at the bottom left of the table area.

**Michigan.gov** | HELP CENTER | CONTACT US | JED BLU

### Michigan Treasury Online

A BUNCH OF GRAPES WINERY - 210335

## Tax Types

You have the ability to add a new tax type and discontinue an existing tax type.  
If you choose to make changes to tax types, your changes are not saved until you click "Submit".

Some changes you make require approval of the Michigan Department of Treasury before your record is updated.

#### Tax Types List

+ ADD TAX

Type	Effective Date	
Sales Tax	January 1, 2015	DISCONTINUE
Use Tax	January 1, 2015	DISCONTINUE
Payroll and Pension Withholding Tax	January 1, 2015	DISCONTINUE

SUBMIT

#### Available Actions

- Manage Business
  - Taxpayer Data
  - Addresses
  - Representatives
  - Owners, Officers & Partners
  - Tax Types**
  - EFT Application
  - Manage Delegates
  - Discontinue Business
  - Track Updates
- Letters and Licenses

## Electronic Funds Transfer (EFT) Debit Application:

This page allows a user to electronically complete an application for Electronic Funds Transfer (EFT) Debit. There is also a link to the paper Credit EFT application. Both of these applications are for MBT, CIT and FTW taxes.

The screenshot shows the Michigan Treasury Online interface for the 'Electronic Funds Transfer (EFT) Debit Application'. The header and navigation are identical to the previous page. The main content area is titled 'Electronic Funds Transfer (EFT) Debit Application' and includes a sub-header 'Tax Types List' with a 'SUBMIT' button. The table below the header has two columns: 'Tax Type' and 'EFT Debit'. To the right, an 'Available Actions' menu is shown, with 'EFT Application' highlighted in a red box. Other actions include 'Manage Business', 'Tax Types', 'Manage Delegates', 'Discontinue Business', 'Track Updates', and 'Letters and Licenses'.

**Michigan.gov** | HELP CENTER | CONTACT US | JED BLU

### Michigan Treasury Online

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## Electronic Funds Transfer (EFT) Debit Application

The credit EFT process is available for Michigan Business Tax, Corporate Income Tax, and Flow Through Withholding only. If you wish to register to pay by CREDIT EFT method for these taxes, [click here to go to the Credit EFT paper form](#).

#### Tax Types List

Tax Type	EFT Debit
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SUBMIT

#### Available Actions

- Manage Business
  - Taxpayer Data
  - Addresses
  - Representatives
  - Owners, Officers & Partners
  - Tax Types
  - EFT Application**
  - Manage Delegates
  - Discontinue Business
  - Track Updates
- Letters and Licenses

## Manage Delegates:

This page allows a user to view all users who have established a relationship with the business.

The screenshot shows the Michigan Treasury Online interface. At the top, there is a navigation bar with the Michigan.gov logo, a 'HELP CENTER | CONTACT US' link, and a user profile 'JED BLU'. Below this is a teal header with 'Michigan Treasury Online' and a breadcrumb 'A BUNCH OF GRAPES WINERY - 210335'. The main heading is 'Manage Delegates', followed by the text 'Below is a list of the delegates for A BUNCH OF GRAPES WINERY.' A table lists the delegates:

Name	Phone Number	Email Address	Access Rights	Actions
Jed Blu	517-631 1	J1234blu@yahoo.com	Registration	<a href="#">REMOVE</a>

To the right of the table is an 'Available Actions' menu with a dropdown arrow. The menu items are: Manage Business (expanded), Taxpayer Data, Addresses, Representatives, Owners, Officers & Partners, Tax Types, EFT Application, **Manage Delegates** (highlighted with a red box), Discontinue Business, and Track Updates. At the bottom of the menu is a button for 'Letters and Licenses'.

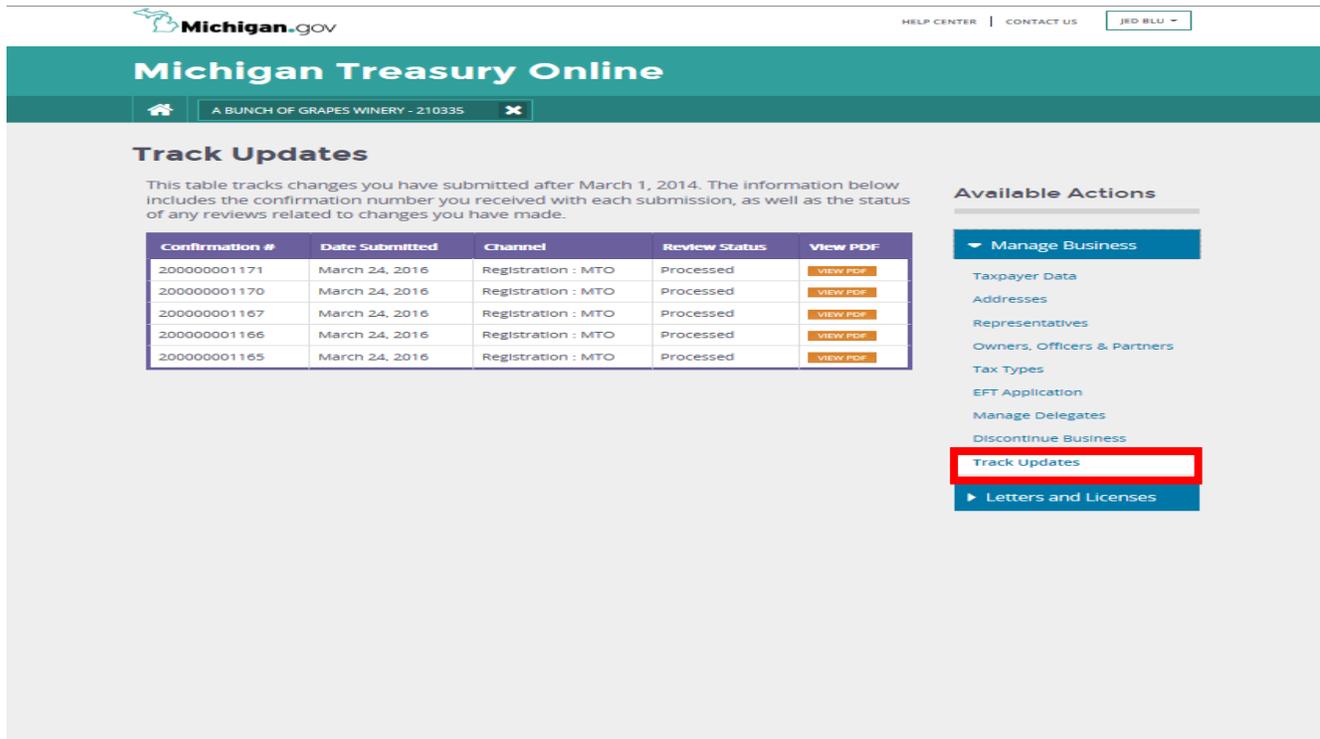
## Discontinue Business:

This page allows a user to discontinue the business electronically.

The screenshot shows the Michigan Treasury Online 'Discontinue Business' page. The navigation bar is identical to the previous page. The main heading is 'Discontinue Business', followed by explanatory text: 'You have the ability to discontinue a business. This might be a complete termination of the business operation, a sale of the business to a third party, or a combination of the two.' A yellow callout box states: 'If the taxpayer will continue some business operations but will no longer be liable for certain taxes, use the "Tax Types" link to discontinue those specific taxes.' A blue information box notes: 'Some changes you make require approval of the Michigan Department of Treasury before your record is updated.' The page is divided into two main sections: 'Discontinue Information' and 'Available Actions'. The 'Discontinue Information' section contains several required fields (marked with an asterisk): 'Date to Discontinue Business and All Taxes' (mm/dd/yyyy), 'Contact Address After Discontinuance or Sale' (Street Address Line 1, Street Address Line 2), 'Country' (dropdown), 'City', 'State' (dropdown), 'Zip', and 'Are you selling your business?' (dropdown with '- Select -'). A 'SUBMIT' button is at the bottom. The 'Available Actions' menu on the right is identical to the previous page, but the 'Discontinue Business' option is highlighted with a red box.

## Track Updates:

This page displays the changes made within the manage business menu after March 1, 2014. A user can view the confirmation number, date submitted, status and PDF displaying the change made.



The screenshot shows the Michigan Treasury Online interface. At the top, there is a navigation bar with the Michigan.gov logo, a home icon, and the user's business name "A BUNCH OF GRAPES WINERY - 210335". The main header is "Michigan Treasury Online". Below this, the "Track Updates" section is active, displaying a table of updates and a list of available actions.

**Track Updates**

This table tracks changes you have submitted after March 1, 2014. The information below includes the confirmation number you received with each submission, as well as the status of any reviews related to changes you have made.

Confirmation #	Date Submitted	Channel	Review Status	View PDF
200000001171	March 24, 2016	Registration : MTO	Processed	<a href="#">VIEW PDF</a>
200000001170	March 24, 2016	Registration : MTO	Processed	<a href="#">VIEW PDF</a>
200000001167	March 24, 2016	Registration : MTO	Processed	<a href="#">VIEW PDF</a>
200000001166	March 24, 2016	Registration : MTO	Processed	<a href="#">VIEW PDF</a>
200000001165	March 24, 2016	Registration : MTO	Processed	<a href="#">VIEW PDF</a>

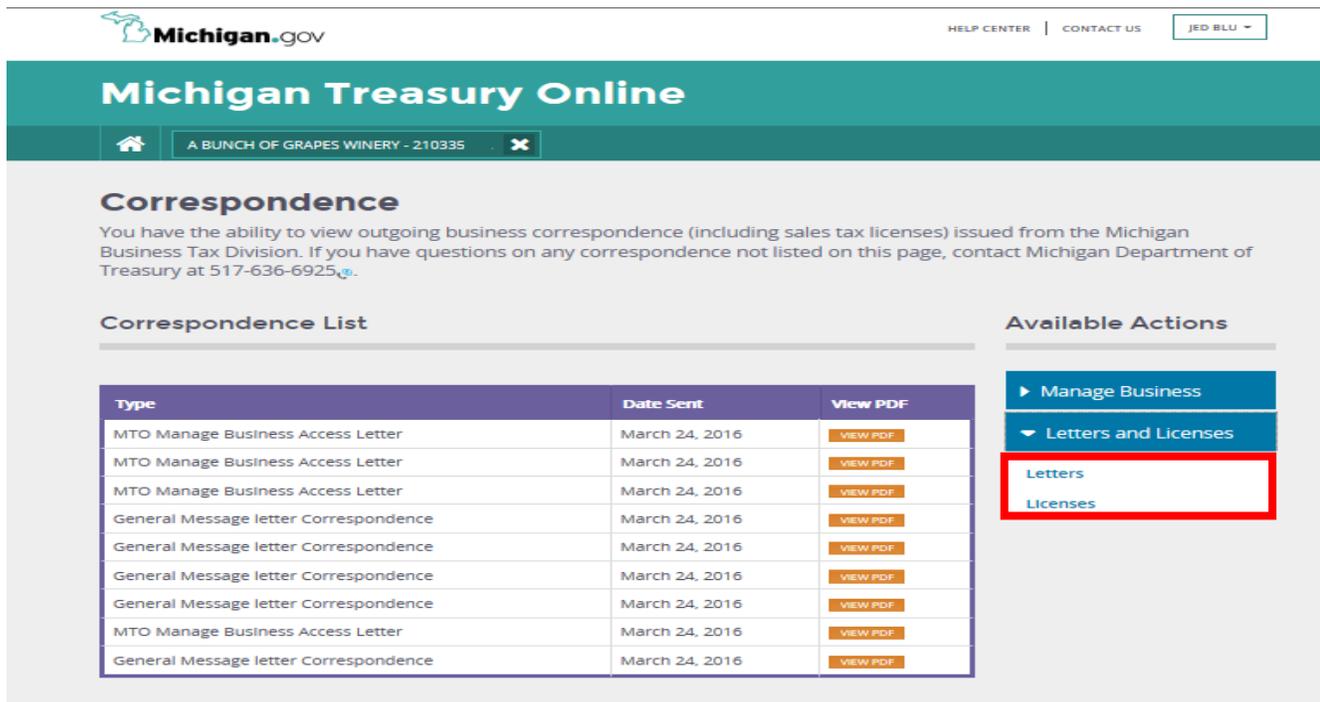
**Available Actions**

- Manage Business
  - Taxpayer Data
  - Addresses
  - Representatives
  - Owners, Officers & Partners
  - Tax Types
  - EFT Application
  - Manage Delegates
  - Discontinue Business
  - Track Updates**
  - Letters and Licenses

 **Note: Any changes made to information within the Manage Business menu are not saved until the Submit button has been selected.**

## Letters and Licenses

Within the Letters and Licenses menu, you will be able to view correspondence from the Michigan Department of Treasury along with a copy of the businesses sales tax license.



The screenshot shows the Michigan Treasury Online interface for the "Correspondence" section. It features a "Correspondence List" table and an "Available Actions" menu.

**Correspondence**

You have the ability to view outgoing business correspondence (including sales tax licenses) issued from the Michigan Business Tax Division. If you have questions on any correspondence not listed on this page, contact Michigan Department of Treasury at 517-636-6925.

**Correspondence List**

Type	Date Sent	View PDF
MTO Manage Business Access Letter	March 24, 2016	<a href="#">VIEW PDF</a>
MTO Manage Business Access Letter	March 24, 2016	<a href="#">VIEW PDF</a>
MTO Manage Business Access Letter	March 24, 2016	<a href="#">VIEW PDF</a>
General Message letter Correspondence	March 24, 2016	<a href="#">VIEW PDF</a>
General Message letter Correspondence	March 24, 2016	<a href="#">VIEW PDF</a>
General Message letter Correspondence	March 24, 2016	<a href="#">VIEW PDF</a>
General Message letter Correspondence	March 24, 2016	<a href="#">VIEW PDF</a>
MTO Manage Business Access Letter	March 24, 2016	<a href="#">VIEW PDF</a>
General Message letter Correspondence	March 24, 2016	<a href="#">VIEW PDF</a>

**Available Actions**

- Manage Business
- Letters and Licenses
  - Letters**
  - Licenses



## 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](http://www.michigan.gov/mtobusiness).