

Third Party Access on OkTAP



Third party access allows another individual, such as a tax preparer, to manage certain aspects of a taxpayer’s accounts on OkTAP, such as filing a return or making payments. The taxpayer with the accounts on OkTAP, or the first party, must grant the third party access and can change or cancel their access at any time. There are four steps that the first and third party must complete to enable access:

1. Third party registers as a third party on OkTAP.
2. First party creates a passphrase and shares the passphrase with the third party.
3. Third party requests access using the passphrase, the account ID and the zip code for the account.
4. First party grants access to third party.

STEP ONE: THIRD PARTY REGISTERS ON OKTAP

The third party must register on OkTAP to get access to a first party’s account.

For **Step 3 of 3: Customer and Account Information**, select **Yes** from the **Are you a third party?** drop-down menu. You must have a valid SSN for FEIN registered with the Oklahoma Tax Commission to register as a third party.

The screenshot displays the OkTAP registration process. The main page is titled 'OKTAP REGISTRATION' and shows three steps. Step 3, 'Customer and Account Information', is active. It includes a dropdown menu for 'Are you a third party?' with 'Yes' selected. A red arrow points to this selection. Below this, there are fields for 'Select ID Type' and 'Enter ID Number'. An 'Account Information' modal window is overlaid on the page, showing the same dropdown menu and a red arrow pointing to the 'Yes' selection. The modal also includes fields for 'Select ID Type' and 'Enter ID Number'. The background page shows a navigation menu on the left and 'Submit' and 'Cancel' buttons at the top right.

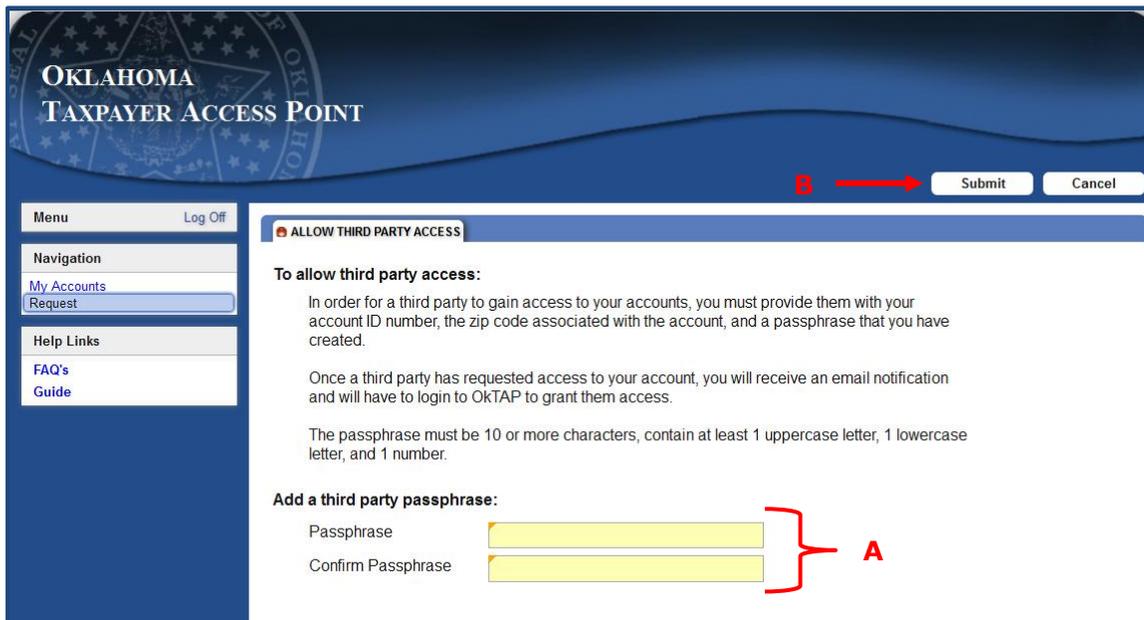
STEP TWO: FIRST PARTY CREATES A PASSPHRASE

After logging in to OkTAP:

1. Click the **Allow Third Party Access** link on the sidebar.



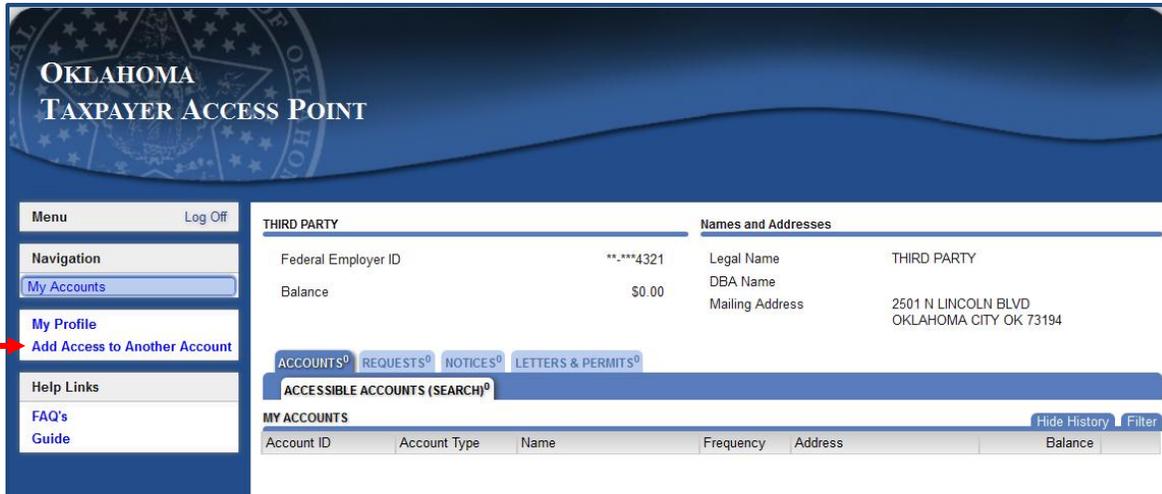
2. Enter and confirm your passphrase (A). The passphrase must be 10 or more characters and contain at least one uppercase letter, one lowercase letter, and one number.
3. Click the **Submit** button (B) to save your passphrase.



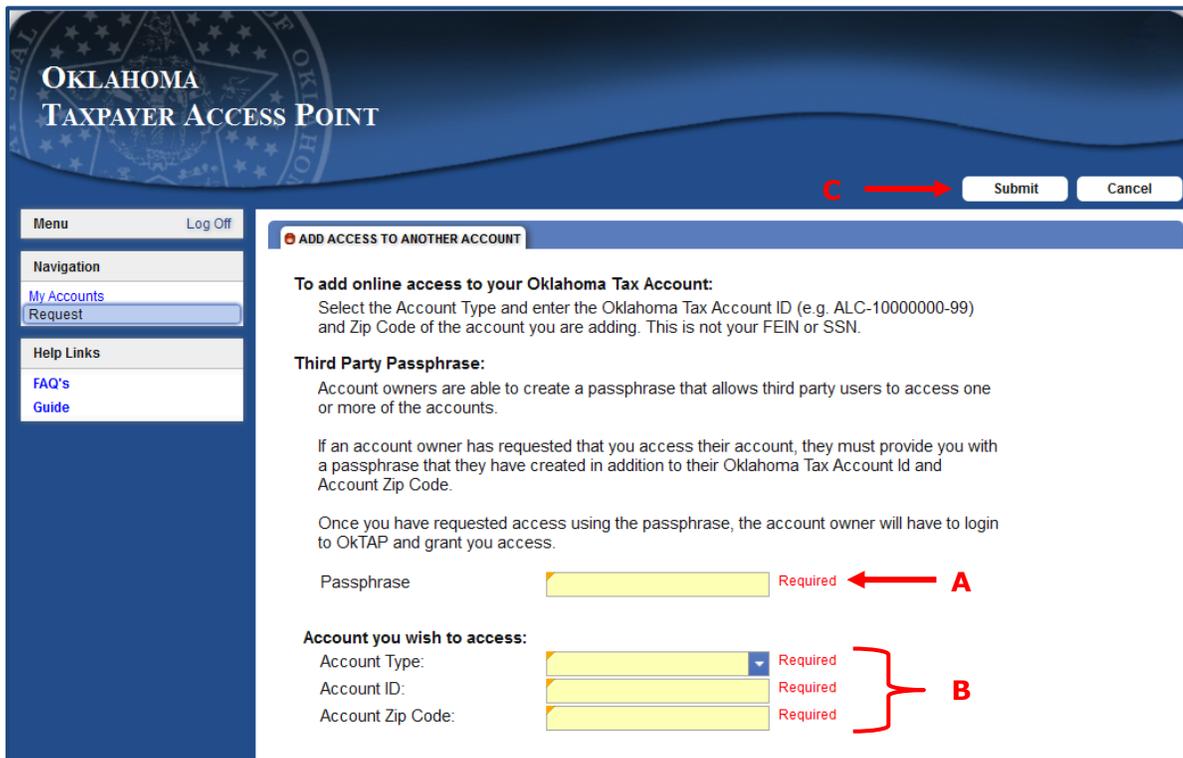
STEP THREE: THIRD PARTY REQUESTS ACCESS

After logging in to OKTAP:

1. Click the **Add Access to Another Account** link on the sidebar.



2. Enter the passphrase (A) provided to you by the first party.
3. Select the account type for the account you are requesting access to, enter the account ID, and account zip code (B).
4. Click the **Submit** button (C) to send the request for access to the first party.



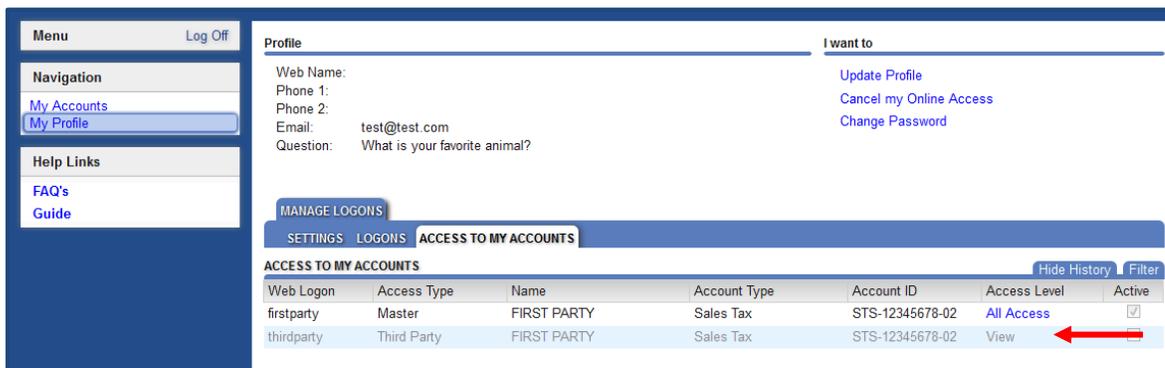
STEP FOUR: FIRST PARTY GRANTS ACCESS

After logging in to OkTAP:

1. Click the **My Profile** link on the sidebar.



2. Navigate to the **Access to My Accounts** tab.
3. Click the **Access Level** link for the account type for the account the third party has requested access. This will be grayed out until marked active.



4. Select the access level from the drop-down menu (A) and click the **Active** checkbox (B) to grant the third party access to that account.
5. Click the **Submit** button (C) to grant the third party access to the account.

