TAP MW-3

Businesses and preparers with access to a client's TAP account can file the MW-3 Annual Reconciliation on TAP.

1. Visit ***https://tap.dor.mt.gov***
2. Log in to TAP
3. Select the **Account ID**
4. Select **File Now** & follow the steps provided

- Payments made to the department are populated on the return. Verify the payments match the employer records and submit.

TAP File Upload W-2s, 1099s, and MW-3s

TAP provides a "File Upload" feature which allows employers, accountants, preparers, payroll service providers and third party representatives the ability to bulk file employer withholding forms online.

Filing Submission Process

- Register for a TAP File Upload Account
- Use your favorite software to format the W-2, 1099 or MW-3 files
- Submit the files to the department

A list of approved software can be found at:
revenue.mt.gov | *Online Services* | *Tax Software*

MT Department of Revenue Helpful Links

revenue.mt.gov* | *Online Services

revenue.mt.gov* | *Online Services* | *Tax Software

https://tap.dor.mt.gov

Sign up for *TAX NEWS YOU CAN USE*
The Montana Department of Revenue's electronic newsletter
http://revenue.mt.gov/home/newsroom

Contact Us

Our staff is prepared to answer your questions Monday through Friday, 8am to 5pm.

Toll-free	(866) 859-2254
In Helena	444-6900
Telephone Device for the Deaf	(406) 444-2830

Montana Department of Revenue
PO Box 5805
Helena, MT 59604-5805

Connect with Us

MT Department of Revenue e-Services Unit
DORE-services@mt.gov
(406) 444-4457

REV: 07.22.2015

Montana Department of
REVENUE

Taxpayer Access Point

Accountant, Bookkeeper and Tax Preparer Reference Guide

MONTANA e-file

TAP Features & Benefits

- Taxpayers and their designated representatives have free, direct access to their tax account information 24/7
- TAP is safe, secure, and all information is treated with confidentiality
- TAP *Help* features FAQs, tutorials and TAP services offered
- Recently added TAP features:
  - ◊ Authorization code required at login
  - ◊ Verify Return—Letter is sent to taxpayers to verify their identity
  - ◊ Ability to file withholding—W-2s, 1099s & MW-3s (single entry and bulk upload)
  - ◊ Property Assessment Division—Industrial & personal property filing
  - ◊ DOJ—Gambling Control Division (request/renew licenses, make payments, etc.)
- Tax preparers, individuals, and businesses can manage tax accounts
  - ◊ View two years of account history
  - ◊ File returns and reports
  - ◊ Schedule and make payments
  - ◊ Update account information
  - ◊ Grant third-party access
  - ◊ Send secure messages to the department via TAP web-messaging

TAP Third Party Access

Third party access can be granted to an accountant, tax preparer, or other professional that is conducting business on behalf of their client (tax account holder).

The tax account holder can grant three levels of access to their account:

- ◊ <u>Full access:</u> File returns, submit payments, view previously filed returns, edit name and address
- ◊ <u>View:</u> View previously filed returns and payment history
- ◊ <u>View and File</u>: View previously filed returns and payment history, file returns, and submit payments

Both a tax preparer and taxpayer must establish their own TAP account before third party access can be granted. To establish a TAP account:

1. Visit **https://tap.dor.mt.gov**
2. Select 

3. Complete and submit the registration

Once both parties have a TAP account, the tax preparer then requests access to the client's TAP account. The taxpayer can then grant access to the tax preparer.

View the TAP help page for complete information regarding third party access

File Power of Attorney

If a taxpayer would like to designate someone else to represent him or her before the Department of Revenue, they must complete and submit a POA. To protect taxpayer's accounts, we use the information provided on the approved POA to validate whom we can discuss the tax account with.

1. Visit ***https://tap.dor.mt.gov***
2. Select **Add Power of Attorney** under the Business heading
3. Complete and submit the form

TAP Payments

1. Visit ***https://tap.dor.mt.gov***
2. Log in to TAP
3. Select **Account ID**
4. Select **Make a Payment** from the left menu bar
5. Choose the period you are paying for
6. Enter the payment amount and date you want it to process

<u>Features</u>

- Pay with eCheck or debit/credit card
- Saves banking information for future transactions
- Schedule payments to process on a future date (up to 365 days in advance)
- View history of <u>all</u> payments on the tax account regardless of how the department received it (i.e. online through any of our payment services, ACH Credit, or mail)