MyTax.DC.gov User Guide:
How to Request and Approve Third Party Access

You can request to manage another taxpayer’s account with his or her permission. Note: Both parties must have a MyTax.DC.gov account (visit “How to Sign up for an Account” for more information).
MyTax.DC.gov User Guide:
How to Request Third Party Access to a Taxpayer’s Account

1. From the MyTax.DC.gov homepage, log in using your Username and Password.
2. In the user profile, locate and click the “Manage My Profile” link in the upper right corner.
3. You will be navigated to the Manage My Profile page
   a. Locate and click the More tab.
4. You will see your “Access” section.
   a. Locate and click the **Request Third Party Access** hyperlink.
5. An **Instructions** page will display. **Note:** You will need to know what type of account the taxpayer signed up with via Mytax.DC.gov in order to make a proper selection.
   
   a. Click **Next**.
6. On the Third Party Access Request page, use the drop-down menu to select the Account Type (e.g. Sales & Use Tax, Withholding Wage Tax) that you would like to gain access to.
   a. In Account Type field, select the type of account the taxpayer signed up with via MyTax.DC.gov in order to request access to their account.
   b. In the Account ID field, enter the Account ID associated with the Account Type. Note: Based on the Account Type selected, the system will request an Account ID, FEIN, SSN or ITIN.
   c. Click Submit.
7. A **Confirmation** pop-up will appear. Click **Ok**.
8. A Confirmation page displays. To obtain a printed copy of this page, click Printable View. Otherwise click Ok.

9. A section to provide Feedback will also appear. Please take a moment to let us know how satisfied you were using the MyTax application to request Third Party Access. You will also be able to share any comments or concerns in the space provided. Once finished, click “Submit Feedback”.

Note: The Taxpayer will receive your third party request via his or her MyTax.DC.Gov account.
10. If the taxpayer approves your third-party request, when you log into your MyTax.DC.gov profile, you will have access to your accounts and the client’s accounts. You will see a list of all accessed accounts.
MyTax.DC.gov User Guide:
How to Approve Third Party Access
1. From the MyTax.DC.gov homepage, log in using your Username and Password.
2. In the user profile, Click the Action Center tab.
3. From your **Action Center**, locate the “**You have a third-party access request pending**” action item.
   a. Click the “**Respond to the Request**” hyperlink.
4. **On the Third-Party Access Approval page**, you will see the Username, Web Profile Name, and Email of the person who has requested access to your account. Additionally, you will see the Account Type for the request.
   a. Click **No** or **Yes** to **Approve Third Party Access**.
   b. Select the **third-party Access Type** from the drop menu. You can grant permission to **File Returns**, **File Returns and Make Payments**, **Make Payments**, and **View**.
   c. Click **Next**.
5. **Review** your third party request.
   a. When ready, click the **Submit** button for your request to be sent to your taxpayer for approval.
6. A **Confirmation** page will appear. Click **Ok**.
7. A **Confirmation** page displays. To obtain a printed copy of this page, click **Printable View**. Otherwise, click **OK** to be returned to the MyTax.DC.gov homepage.

8. A section to provide **Feedback** will also appear. Please take a moment to let us know how satisfied you were using the MyTax application. You will also be able to share any comments or concerns in the space provided. Once finished, click “**Submit Feedback**”.