MTO Learning Series

Tax Services: Connect on MTO

Create a business relationship

Disclaimer

This handout is provided for illustrative purposes only. The content does not carry the weight of law, bulletins or rulings. Therefore, it should only to be used as an aid for navigation reference.

The topics covered, screenshots provided and guidance supplied is subject to change. The most current Treasury information regarding this topic is available at **michigan.gov/taxes**.

connect on MTO

You

Your Business

You set up your personal user profile and can log in to MTO, but, how do you see your business?

The next step is connecting your MTO profile to a Treasury registered business. We call this process “create a business relationship”.

What is a business relationship?

- *a semi-permanent link between your MTO profile and a Treasury registered business*
- *permits access to privileged account information and restricted electronic processes*
- **You create it.**
  - We call this "self-delegation".
  - do not need Treasury or a designated business person to approve your connection
  - lasts until changed or removed
- **How does it work?** We ask you "shared secret" questions.
  - questions depend on the type of access you request
  - To answer correctly, choose or provide answers that match information Treasury currently has on file. This information was previously reported/updated by the business.
- *a necessary balance between ease of access and taxpayer security*

tip

With your MTO profile, you can connect to as many businesses as you need to. There are **no limits**.

This is helpful for CPAs who have many clients or taxpayers with multiple businesses.

The graphic to the right illustrates 1 MTO user connecting to 3 different business on MTO.

BUSINESS

BUSINESS

MTO Relationship

MTO Relationship

CPA/Service Provider

MTO Relationship

BUSINESS

tip

Similarly, there are **no limits** to the number of MTO users connected to a single business.

For example, the business owner, an accountant and an employee can each connect to a business with their own MTO user profile, maintaining independent access to web services.

The graphic to the right illustrates 3 MTO users who have each connected to 1 business on MTO.

Owner

Employees

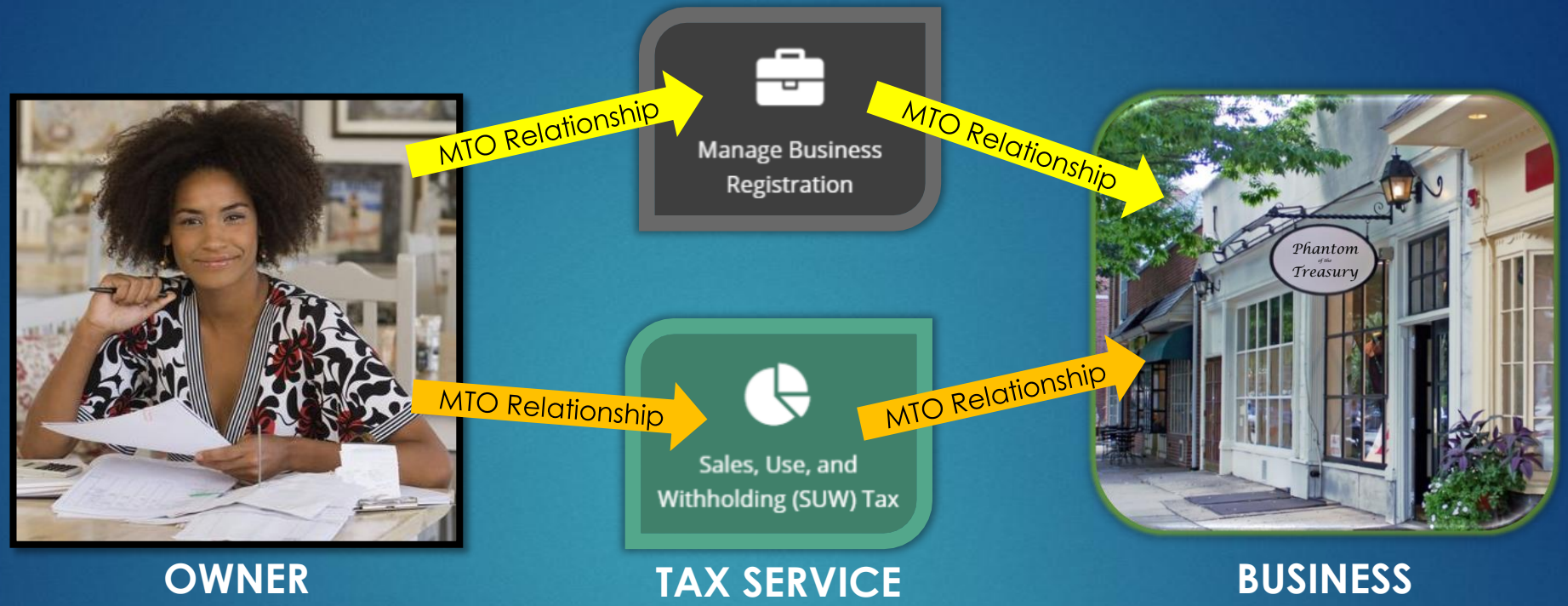
MTO Relationship

MTO Relationships

BUSINESS

MTO Relationships

CPA/Service Providers



tip

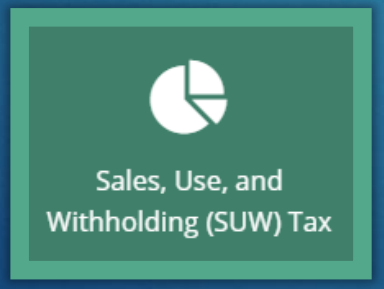
Depending on how an MTO user needs to interact with Treasury on behalf of one business, they can connect to a business in multiple ways through different Tax Services.

The graphic above illustrates 1 MTO user connecting to 1 business through 2 different Tax Services.

Tax Services

If your business is not actively registered with Treasury, use this portal to register online.

View or update how a business is registered with Treasury; establish an Authorized Representative Declaration; manage MTO accesses; access the sales tax license.



File and pay sales, use and withholding (SUW) taxes, view/print filed returns, view payment history, access the sales tax license and more.

Tax Services

continued…

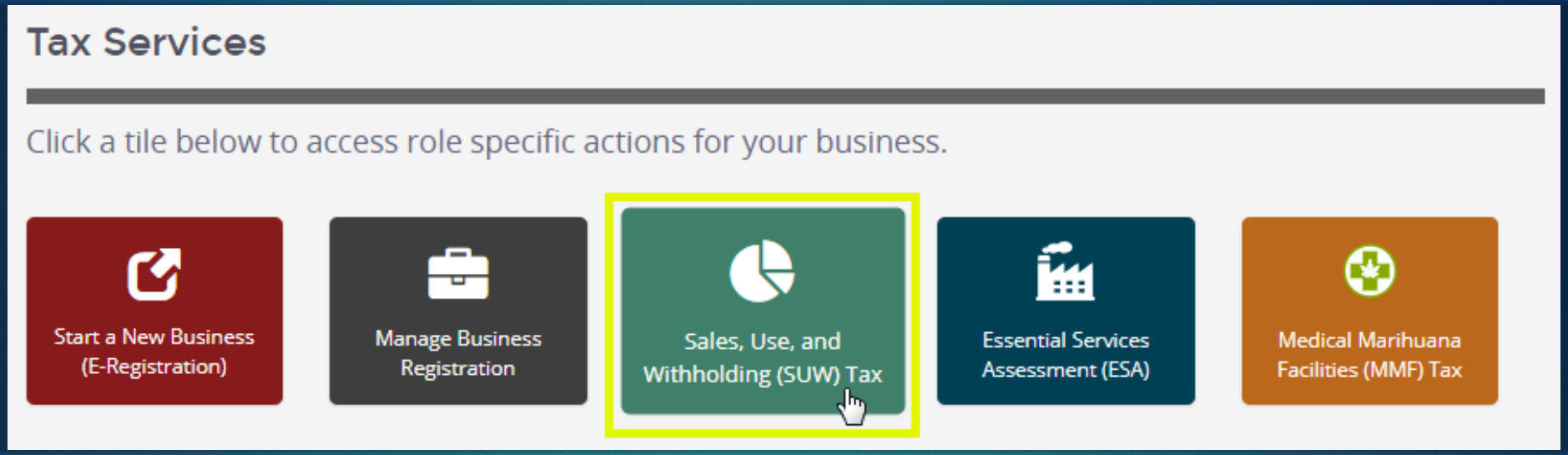
View an essential services assessment (ESA) return summary, certify or amend a statement, pay a liability and more.

File and pay medical marihuana facilities (MMF) tax, view/print filed returns, manage business locations licensed by LARA and more.

create a business relationship

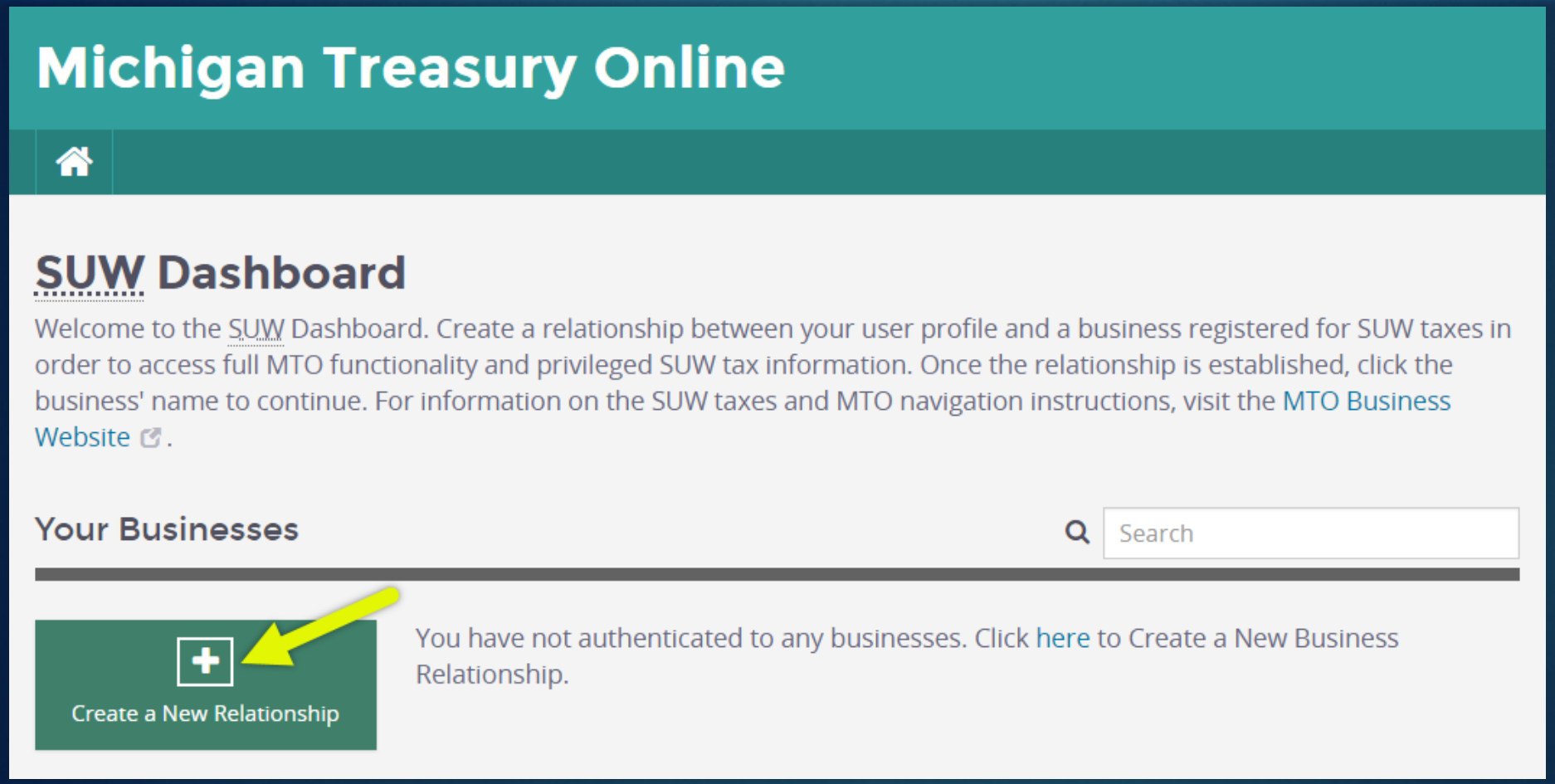
IN 6 EASY STEPS

Step 1: select a Tax Service from the homepage



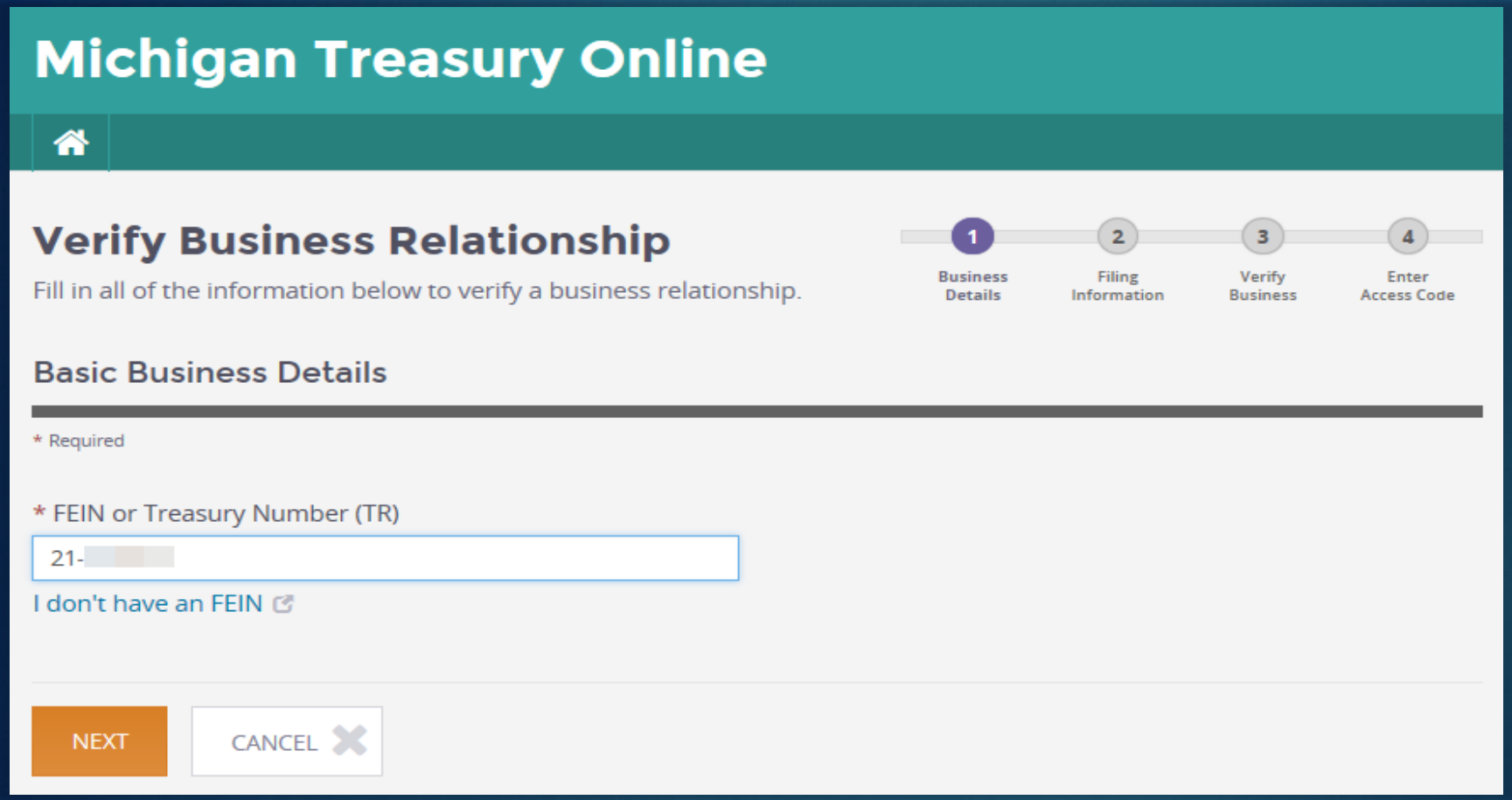
The following instructions illustrate this process using ***SUW Tax Service***, however the steps are the same for all Tax Services.

Step 2: Dashboard – click *Create a New Relationship*



- The **Dashboard** lists all your business connections for a particular Tax Service.
- You can find your connections under the **Your Businesses** section.
- Click ***Create a New Relationship*** if your business is not already listed.

Step 3: identify the business



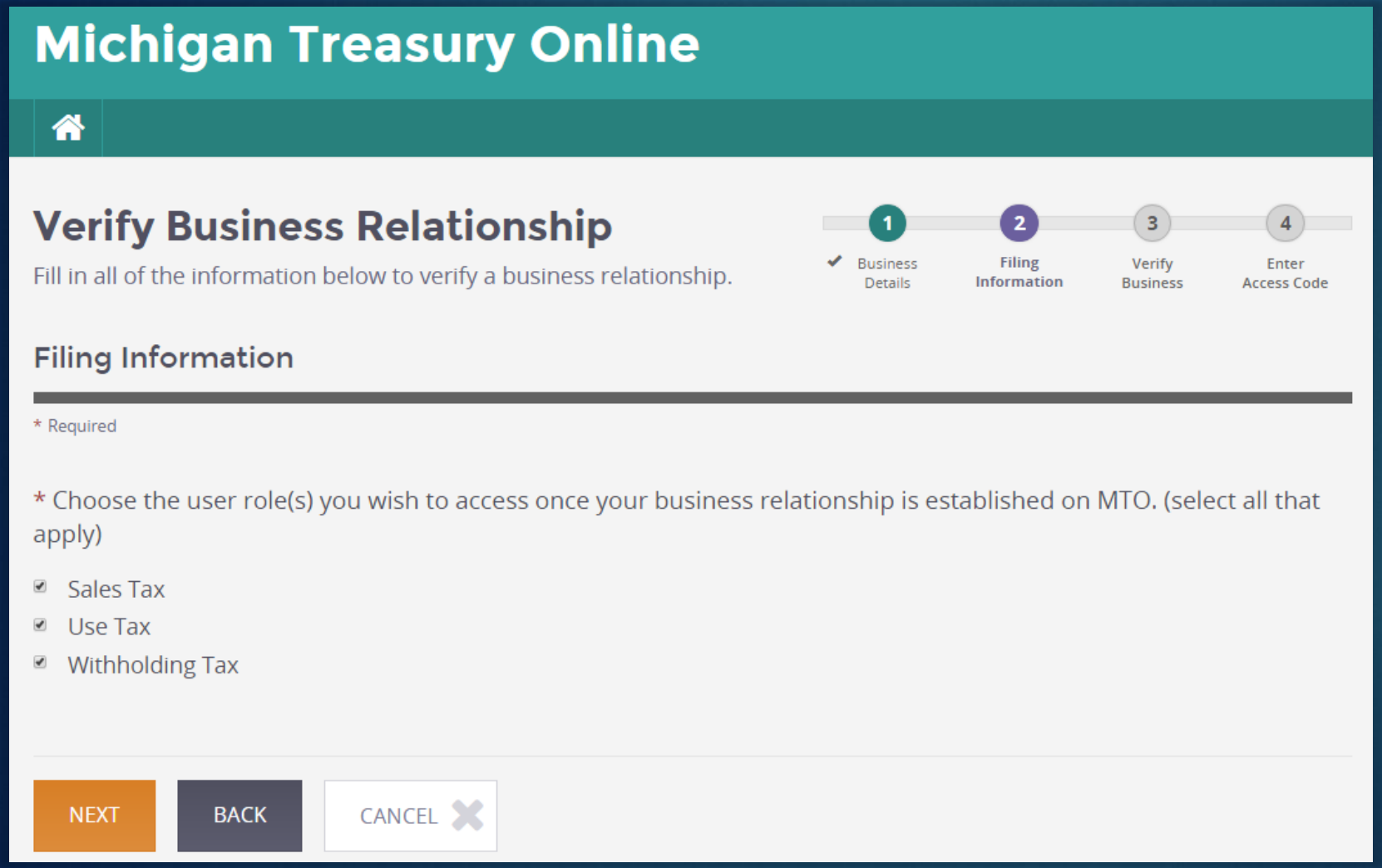
Identify the business you want to connect to by entering its:

- Federal Employer Identification Number (FEIN)

  or

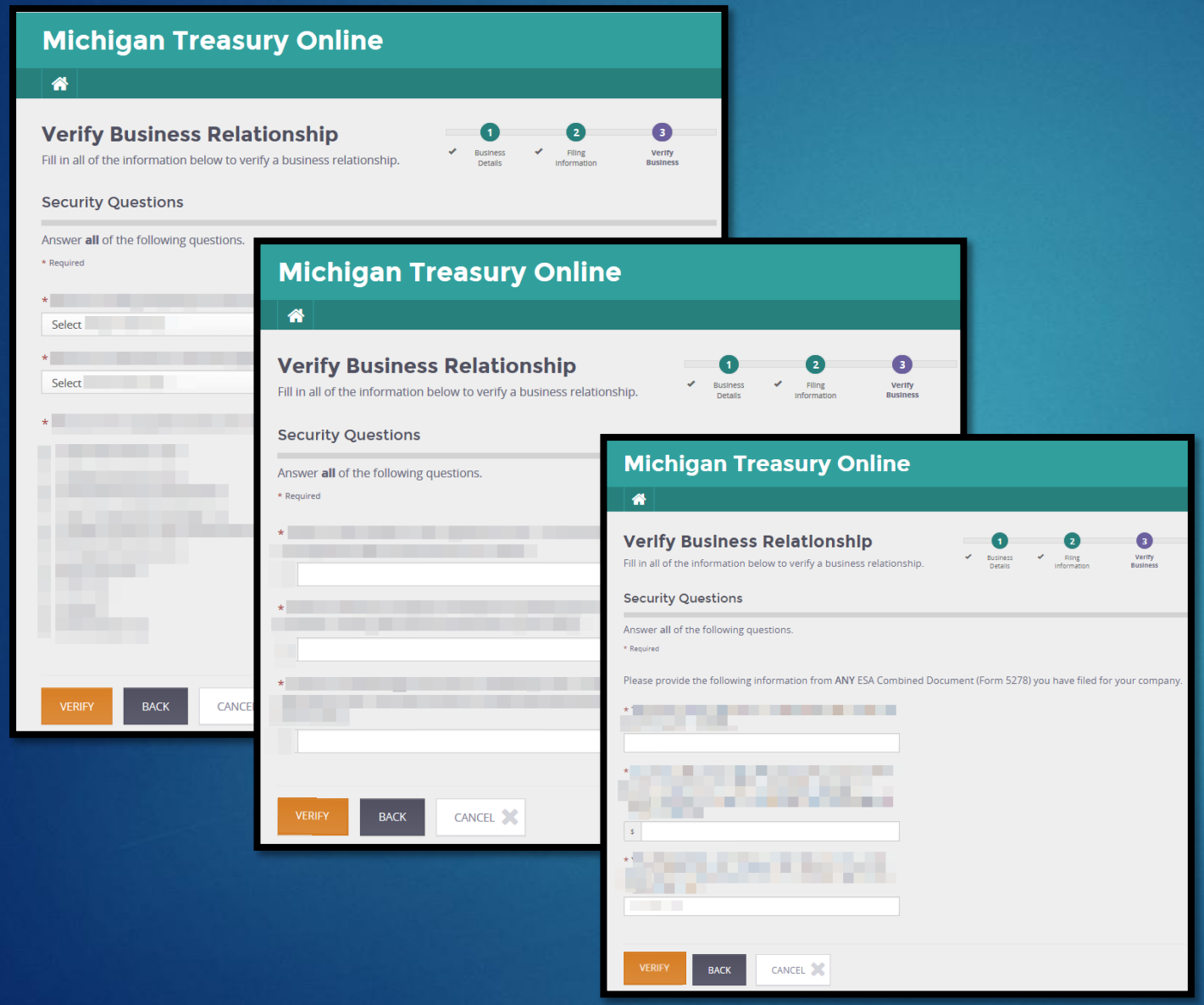
- assigned Treasury Registration (TR) number.

Step 4: select your user role(s)



- The user role(s) listed are the tax types or information you can connect to based on the business' current registration.
- Select a user role by checking the box next to its name.
- The checked user role(s) represent the type of information you have access to after you connect.
- Choose all user roles you need, but not more than you are responsible for.

Step 5: answer shared secret questions

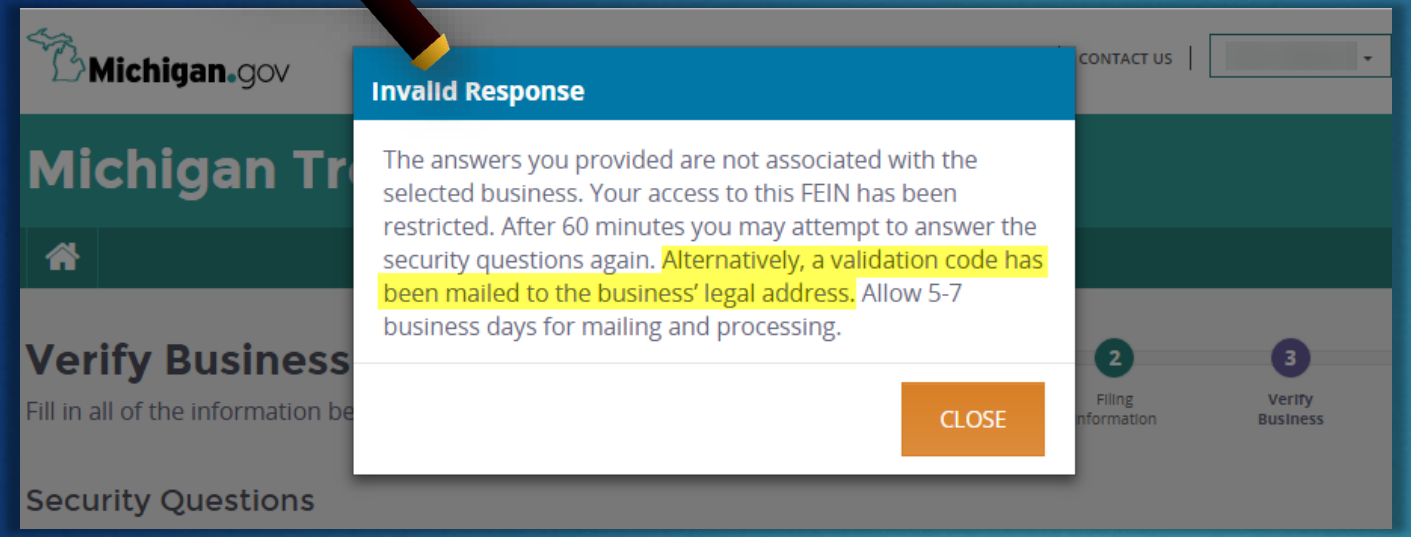


- Based on the user role(s) you selected, we give you questions to answer.
- **Think of this as a quiz** – choose or provide answers that match information Treasury currently has on file. This information was previously reported/updated by the business.
- You have 3 attempts to answer the shared secret questions correctly.

The graphic to the left illustrates 3 possible shared secret screens.

You will only see 1 of these screen examples when you connect.

a closer look … validation code



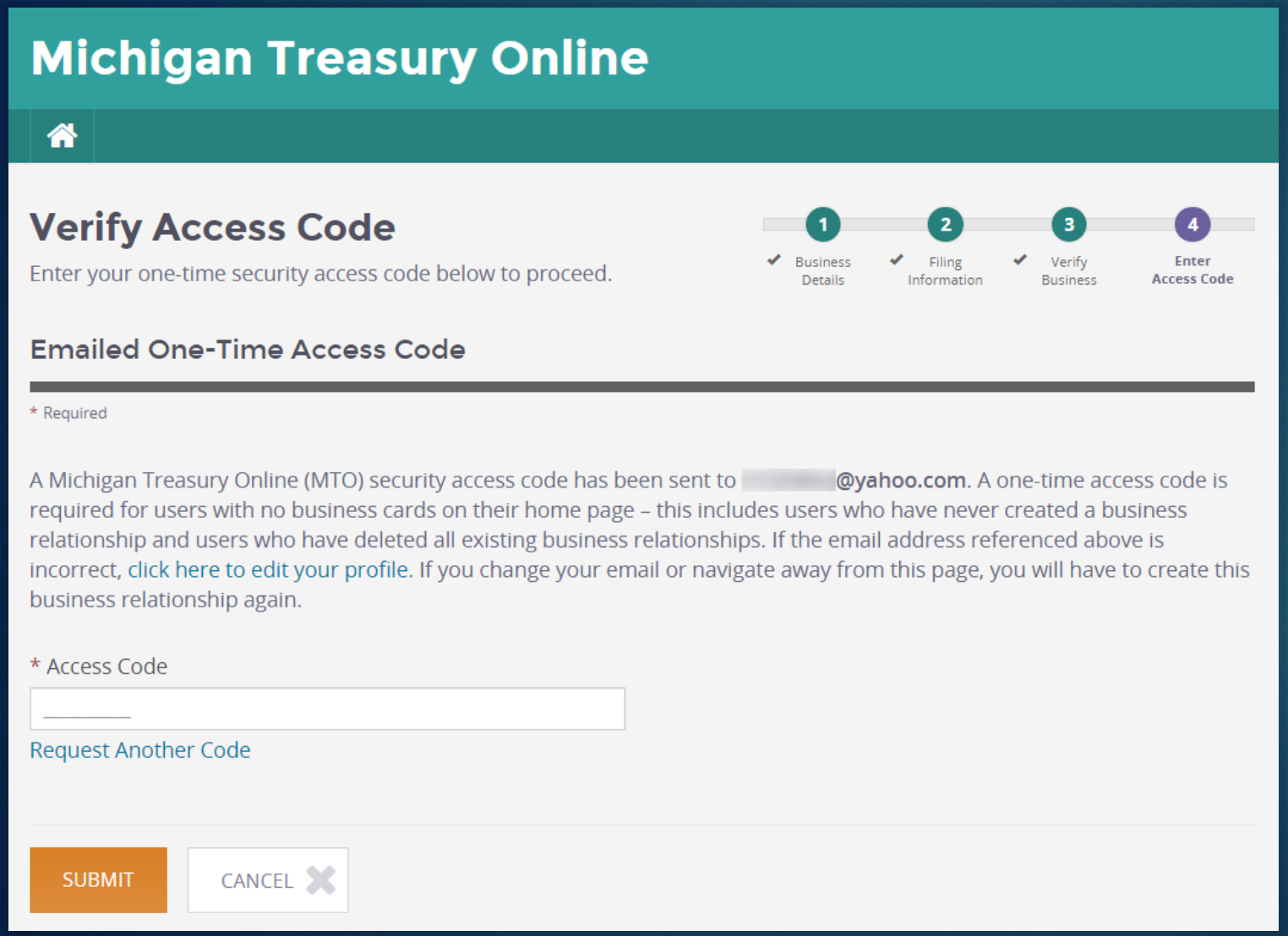
If you incorrectly answer the shared secret questions three times, you cannot access the business account for 60 minutes (for security purposes).

After the lockout period, start the connection process from the beginning. If you have an active validation code on file, choose whether to answer the shared secret questions or use the validation code to make your business connection.

validation code letter:

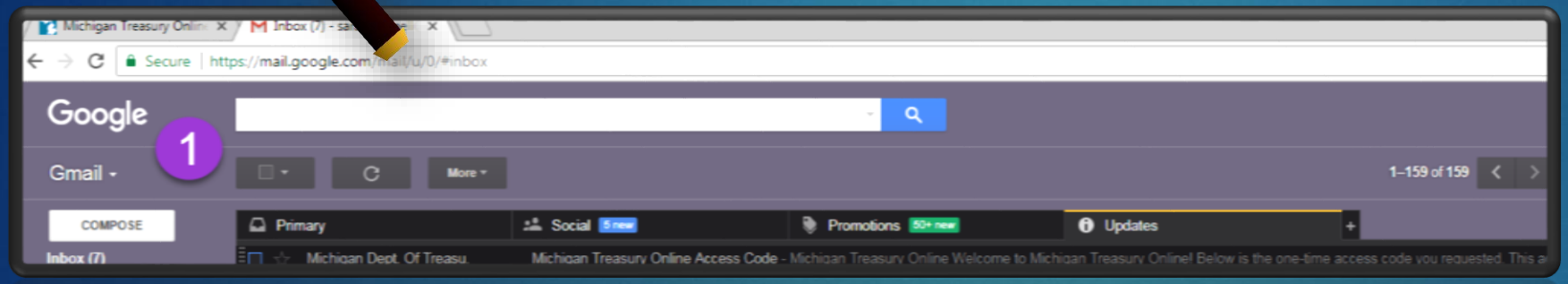
- backup plan; sent when you answer the shared secret questions incorrectly 3 times
- letter mailed to the business' legal address; details *who* and *what* access was attempted on MTO
- business decides if access should be granted by controlling access to the validation code
- code can only be used by the MTO user, business account, and Tax Service listed on the letter
- code is active for 30 days; inactivated if entered incorrectly 3 times

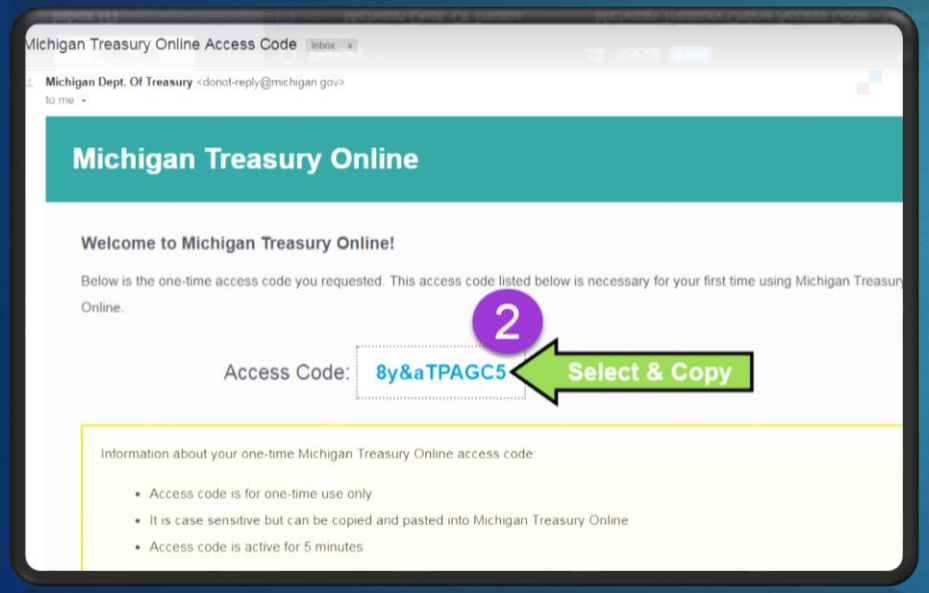
Step 6: emailed access code

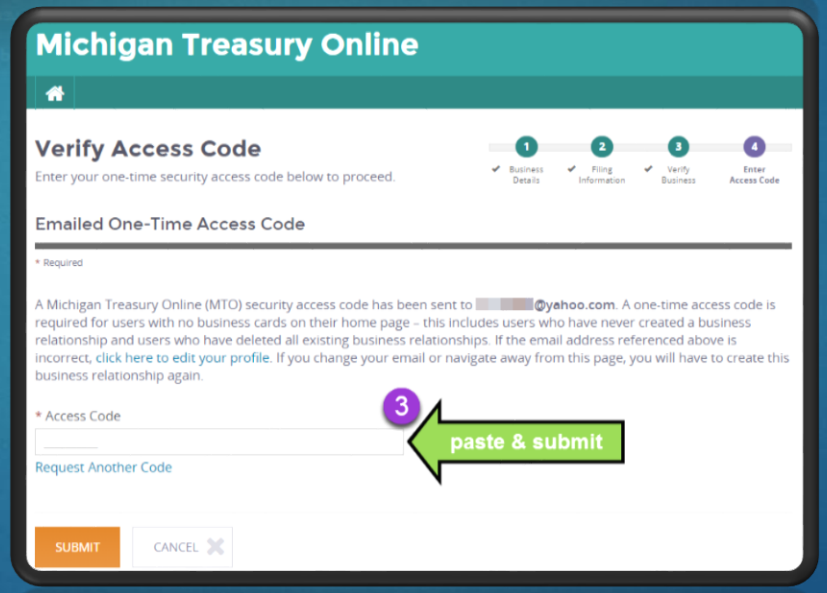


- only required for your first business connection
- sent to the email address listed on your MTO user profile
- **Do not navigate away from this page to retrieve the emailed access code. If you do, you have to start over.**
- You may copy/paste or type the emailed access code into MTO's **Access Code** field.

a closer look … emailed access code



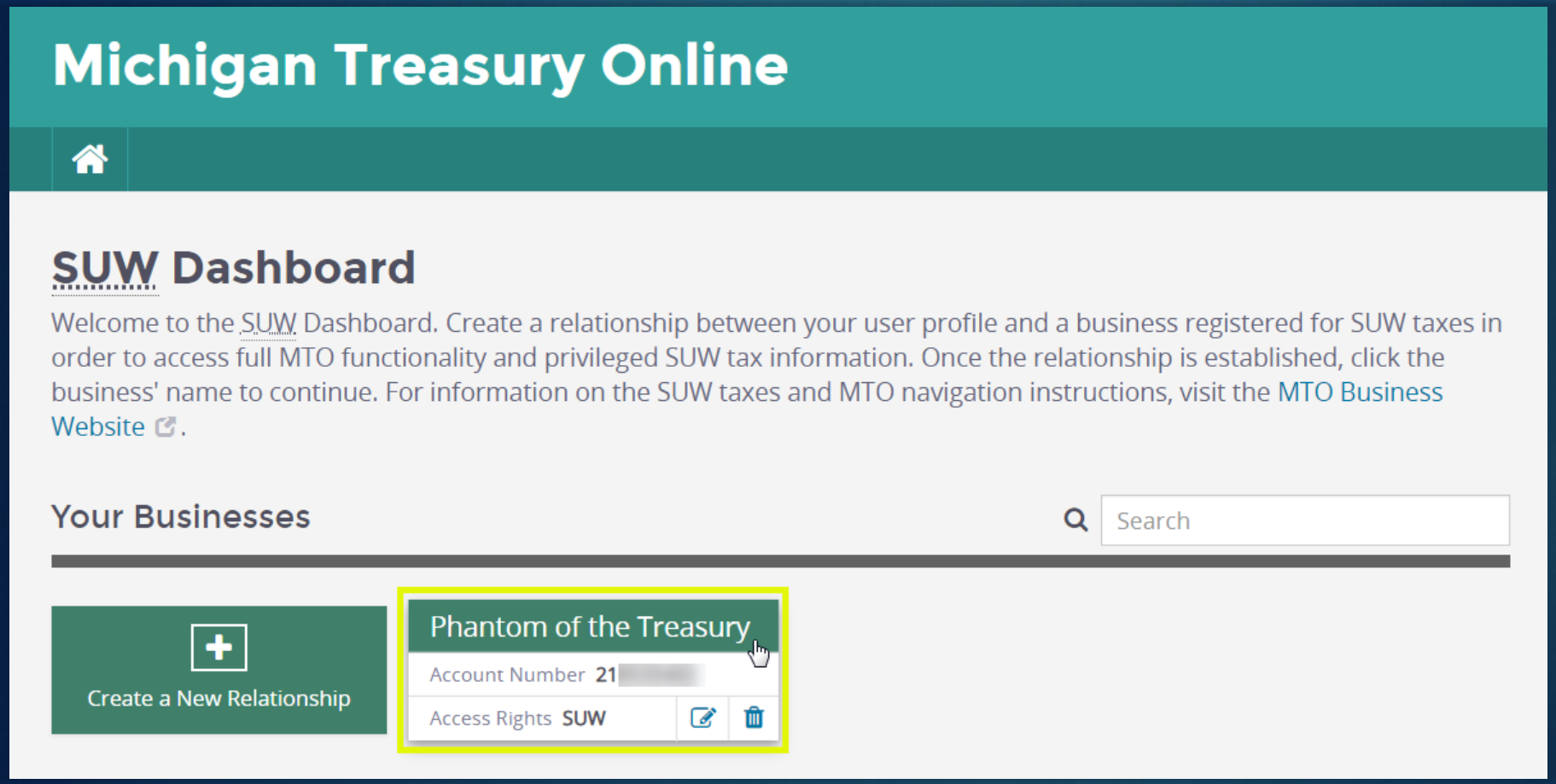




to retrieve the emailed access code without leaving MTO:

1. Open a new browser window, tab, or app on your smart phone.
   - log in to your email
   - locate the email
     from: Michigan Dept. of Treasury
     subject: Michigan Treasury Online Access Code
   - Check your spam or junk folder if the email does not appear within 1 minute.
2. Open the email and copy/notate the access code.
3. Return to your open MTO page and paste/type the access code into the indicated field. Click submit.

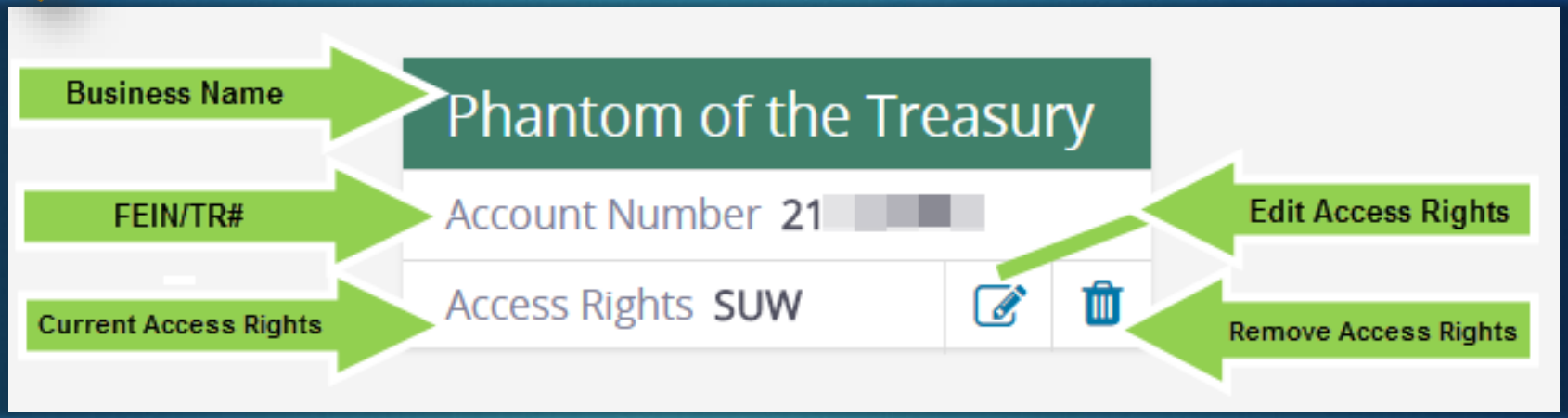
business relationship created



- MTO returns you to the **Dashboard**.
- Your connection to the business is organized as a "business card" under **Your Businesses**.
- Click the business' name to begin interacting with Treasury.

a closer look …

anatomy of the business card



Business Name: Click the business' name to interact with Treasury.

Current Access Rights: the details of your connection to this business

Your access rights are the user role(s) during the connection process that you selected and answered shared secret questions.

For SUW, **S** = sales tax , **U** = use tax on sales and rentals, and **W** = withholding tax

Edit Access Rights: Change your existing business connection by adding or deleting access rights.

Remove Access Rights: Delete all of your access rights to a business for a particular Tax Service. This also removes the business card from the Dashboard. This action is not reversible; to get your connection back you must create a new business relationship.

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