

Michigan Treasury Online (MTO) Optimization

Learning Series 2: Creating a Profile and Establishing a Business Relationship

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

June 2016

Customer Friendly

Simplified Process

What's New in MTO?

- [How to Log-in](#)
- [How to Create a User Profile](#)
- [How to Edit a User Profile](#)
- [How to Retrieve a Username](#)
- [How to Reset a Password](#)
- [How to Add a Business to an MTO User's Account](#)

Learning Series 2: Creating a Profile and Establishing a Business Relationship.

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 functionality 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)

In January 2016, **Michigan Business One Stop (MBOS) went away!** Michigan Treasury Online (MTO) is no longer be tied to MBOS and will be a stand-alone website.

Log-In to MTO

 **Note:** Existing MTO users are able to log-in with their previously established username and password. New MTO users must first create a new user profile before they can log into MTO.

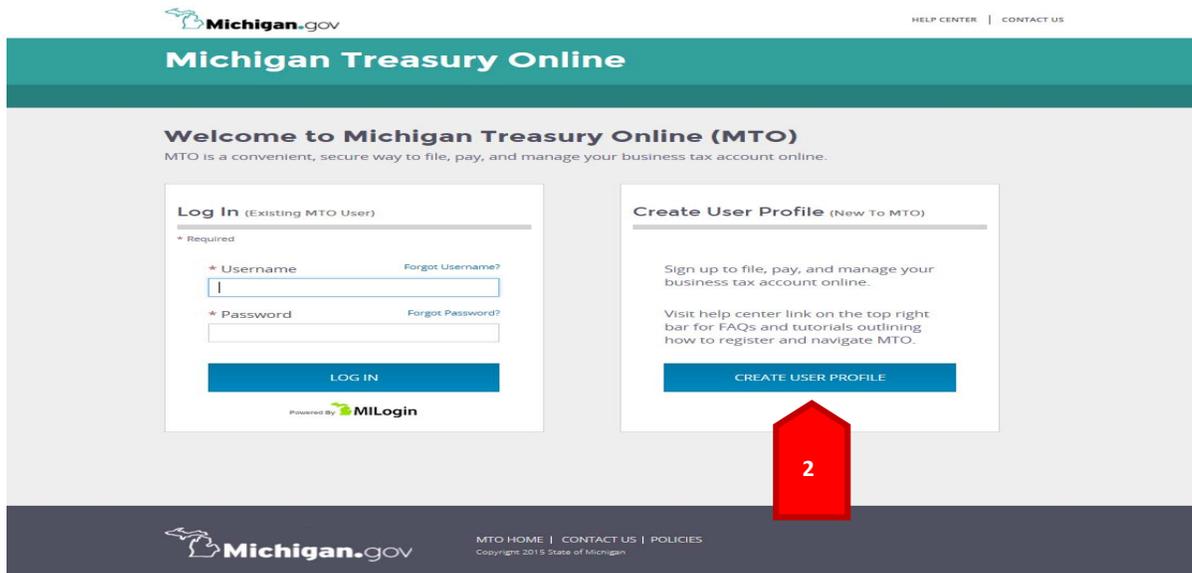
1. If you are a current MTO user, access MTO using: <https://mto.treasury.michigan.gov>
2. Enter your current **Username**.
3. Enter your current **Password**.
4. Select **LOG IN**.



The screenshot shows the Michigan Treasury Online (MTO) homepage. At the top, there is a navigation bar with the Michigan.gov logo and links for 'HELP CENTER' and 'CONTACT US'. Below this is a teal header with the text 'Michigan Treasury Online'. The main content area features a welcome message: 'Welcome to Michigan Treasury Online (MTO)' and 'MTO is a convenient, secure way to file, pay, and manage your business tax account online.' There are two main sections: 'Log In (Existing MTO User)' and 'Create User Profile (New To MTO)'. The 'Log In' section has fields for 'Username' and 'Password', both marked as required, with links for 'Forgot Username?' and 'Forgot Password?'. A blue 'LOG IN' button is at the bottom of this section. A red arrow with the number '2' points to the 'Username' field, and another red arrow with the number '3' points to the 'Password' field. A red arrow with the number '4' points to the 'LOG IN' button. The 'Create User Profile' section has a blue 'CREATE USER PROFILE' button. The footer contains the Michigan.gov logo, 'MTO HOME | CONTACT US | POLICIES', and 'Copyright 2015 State of Michigan'.

Create a User Profile

1. To access MTO, use: <https://mto.treasury.michigan.gov>
2. Select **CREATE USER PROFILE**.



This screenshot is identical to the one above, showing the Michigan Treasury Online (MTO) homepage. However, a red arrow with the number '2' points to the 'CREATE USER PROFILE' button in the 'Create User Profile (New To MTO)' section.

3. Enter required Profile Information including answering the **Verification Question** and agreeing to the **terms & conditions**.
4. Select the **Next** button.

Michigan.gov HELP CENTER | CONTACT US

Michigan Treasury Online

Create User Profile

Enter your profile information.

1 Profile Information 2 Choose Username 3 Confirmation

Profile Information

* Required

* First Name Middle Initial * Last Name Suffix

* Email Address * Confirm Email Address

To reset the forgotten password, you can receive a temporary personal identification number (PIN) to above email address.

* Phone Number Mobile Number

To reset the forgotten password, you can choose to receive a temporary PIN on your mobile device as a text.

* Verification Question:

* I agree to the [terms & conditions](#).

NEXT BACK

5. Choose a **Username** using the established Username guidelines.
6. Choose a **Password** using the established Password guidelines.
7. Confirm your **Password**.
8. Select **Submit**.

Michigan.gov HELP CENTER | CONTACT US

Michigan Treasury Online

Create User Profile

Provide username and password information to complete your profile.

1 Profile Information 2 Choose Username 3 Confirmation

Choose Username

* Required

* Username

* Password

* Confirm Password

Username guideline:

- ✓ Enter your last name, first initial, and any 4 numbers with no space between them. For Example: John Smith and using 9999 as an example for the four digit number, you would enter smithj9999.

Password guidelines:

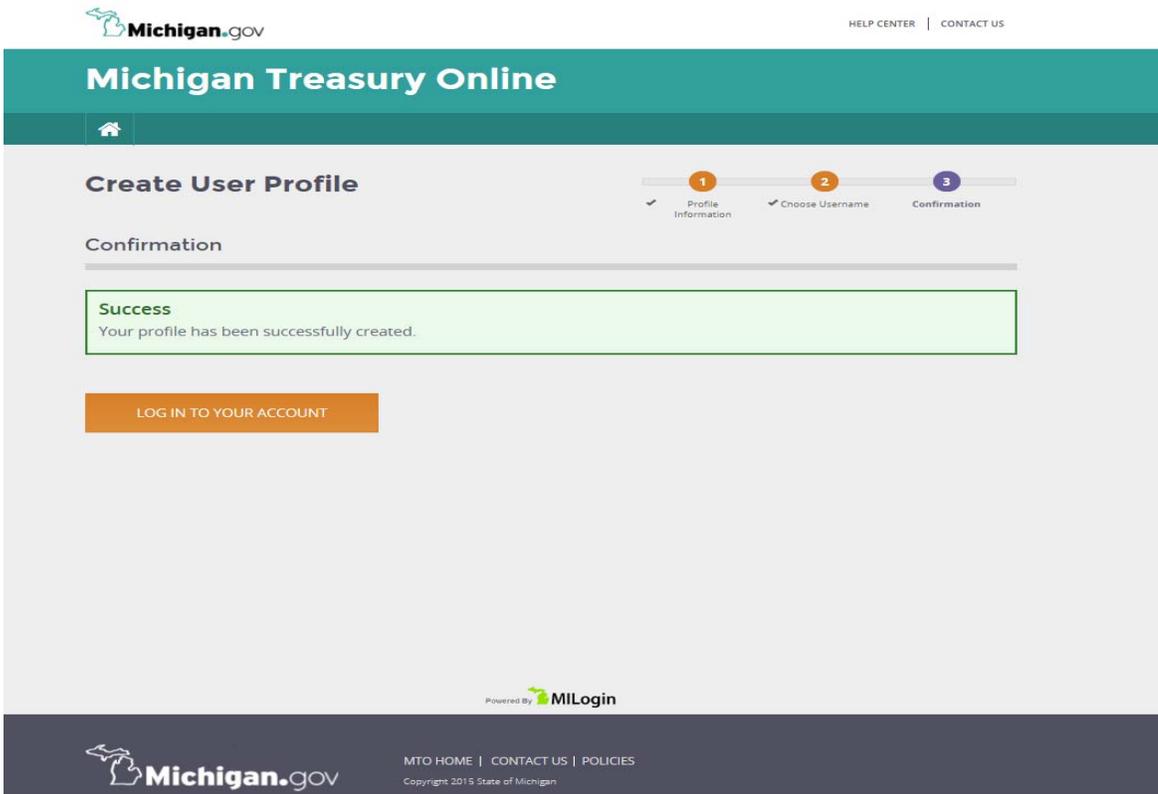
- ✓ Must be at least 8 characters in length
- ✓ Must include characters from 3 of the following categories:
 - Upper case letters (A-Z)
 - Lower case letters (a-z)
 - Numbers (0-9)
 - Special characters (!\$#,%@~^&*_+=<->)
- ✓ Should not be based on your Username

SUBMIT BACK

Powered By MLogin

Michigan.gov MTO HOME | CONTACT US | POLICIES
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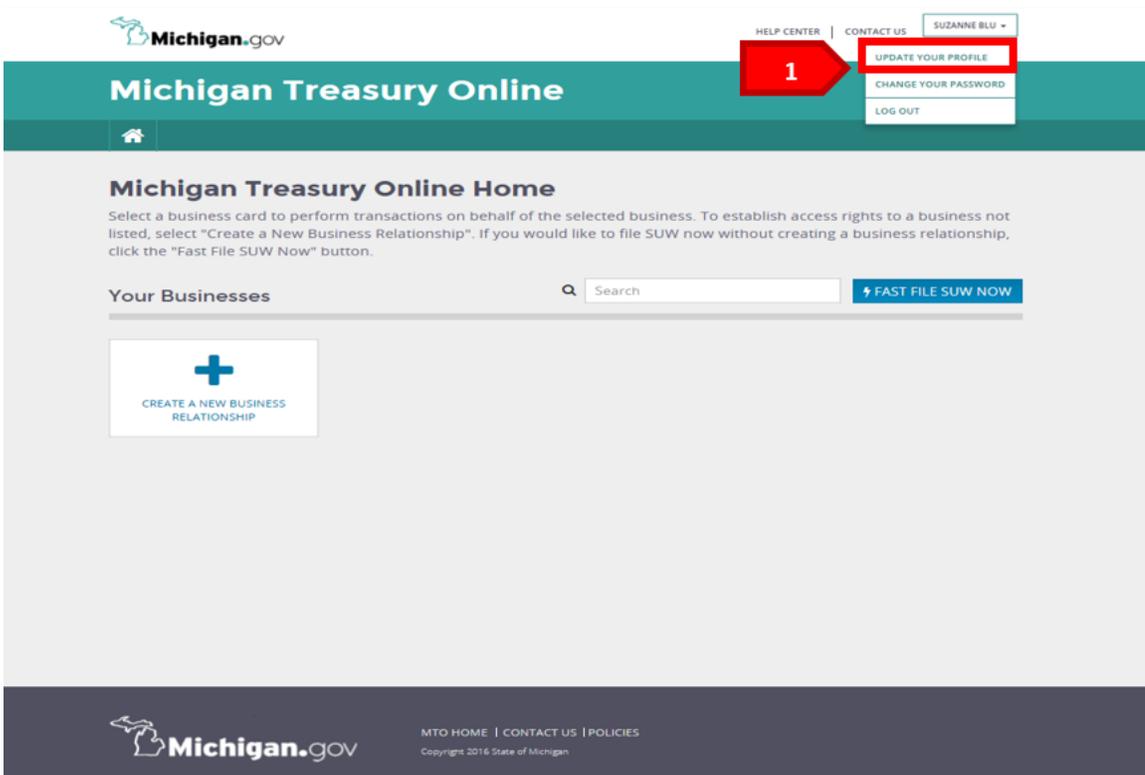
 **Note:** You will receive a confirmation notice once your profile is successfully created, and you will have the option to log-in to your account.



The screenshot shows the 'Michigan Treasury Online' interface. At the top left is the Michigan.gov logo. At the top right are links for 'HELP CENTER' and 'CONTACT US'. The main header is 'Michigan Treasury Online' with a home icon. Below the header is the 'Create User Profile' section. A progress bar shows three steps: 1. Profile Information (checked), 2. Choose Username (checked), and 3. Confirmation (active). A green success message box states: 'Success Your profile has been successfully created.' Below this is an orange button labeled 'LOG IN TO YOUR ACCOUNT'. At the bottom, it says 'Powered By MILogin' and includes footer links: 'MTO HOME | CONTACT US | POLICIES' and 'Copyright 2015 State of Michigan'.

Edit a User Profile

1. Select **UPDATE USER PROFILE** from the drop-down menu under your name in the top right-hand corner of the screen.



The screenshot shows the 'Michigan Treasury Online Home' page. At the top left is the Michigan.gov logo. At the top right are links for 'HELP CENTER', 'CONTACT US', and a user menu for 'SUZANNE BLU'. The user menu is open, showing options: 'UPDATE YOUR PROFILE' (highlighted with a red box and a red arrow labeled '1'), 'CHANGE YOUR PASSWORD', and 'LOG OUT'. The main header is 'Michigan Treasury Online' with a home icon. Below the header is the 'Michigan Treasury Online Home' section with instructions: 'Select a business card to perform transactions on behalf of the selected business. To establish access rights to a business not listed, select "Create a New Business Relationship". If you would like to file SUW now without creating a business relationship, click the "Fast File SUW Now" button.' Below this is a search bar and a blue button labeled 'FAST FILE SUW NOW'. A large blue plus sign icon is followed by the text 'CREATE A NEW BUSINESS RELATIONSHIP'. At the bottom, it says 'Michigan.gov' and includes footer links: 'MTO HOME | CONTACT US | POLICIES' and 'Copyright 2016 State of Michigan'.

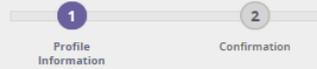
2. Update necessary **Profile Information**.
3. Select **Submit**.

Michigan Treasury Online



Update Profile

Update your profile information.



Profile Information

* Required

* First Name	Middle Initial	* Last Name	Suffix
<input type="text" value="Suzanne"/>	<input type="text"/>	<input type="text" value="Blu"/>	<input type="text"/>

* Email Address	* Confirm Email Address
<input type="text" value="bluj1234@yahoo.com"/>	<input type="text" value="bluj1234@yahoo.com"/>

To reset the forgotten password, you can receive a temporary personal identification number (PIN) to above email address.

* Phone Number	Mobile Number
<input type="text"/>	<input type="text"/>

To reset the forgotten password, you can choose to receive a temporary PIN on your mobile device as a text.

2

3

SUBMIT

CANCEL ✕

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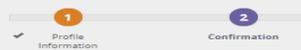


Note: You will receive a confirmation notice that your profile has been successfully updated.

Michigan Treasury Online



Update Profile



Confirmation

Success
Your profile has been successfully updated.

RETURN TO HOME PAGE

Powered By MILogin

Retrieve a Username

1. Select **Forgot Username?**

Log In (Existing MTO User)

* Required

* Username [Forgot Username?](#)

* Password [Forgot Password?](#)

LOG IN

Powered By MILogin

 **Note:** For security reasons, **Verification Questions presented on the screen below** will not be shown in the Learning Series.

2. Enter your **Email Address** and answer the **Verification** question(s).
3. Select the **Submit** button. Selecting the *Cancel* button returns you to the MTO log-in screen.

Michigan.gov

HELP CENTER | CONTACT US

Michigan Treasury Online

Forgot Username

Provide your email address to proceed.

1 Enter Email Address 2 Confirmation

Enter Email Address

* Required

* Email Address

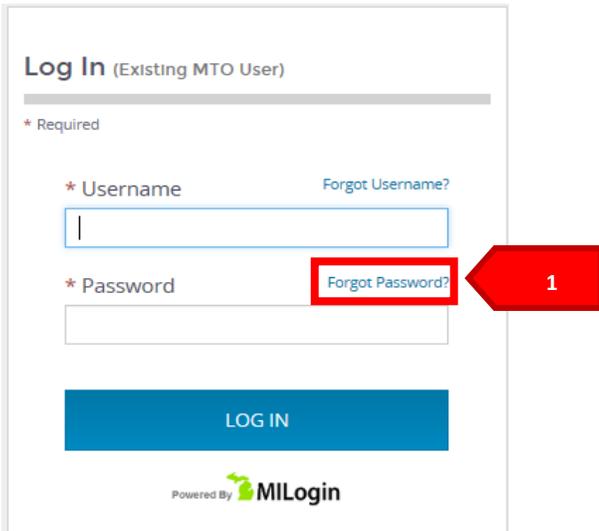
* Verification Question:

SUBMIT CANCEL

 **Note:** At this point, your username has been sent to the email address listed in your user profile.

Reset Password

1. Select **Forgot Password?**



Log In (Existing MTO User)

* Required

* Username [Forgot Username?](#)

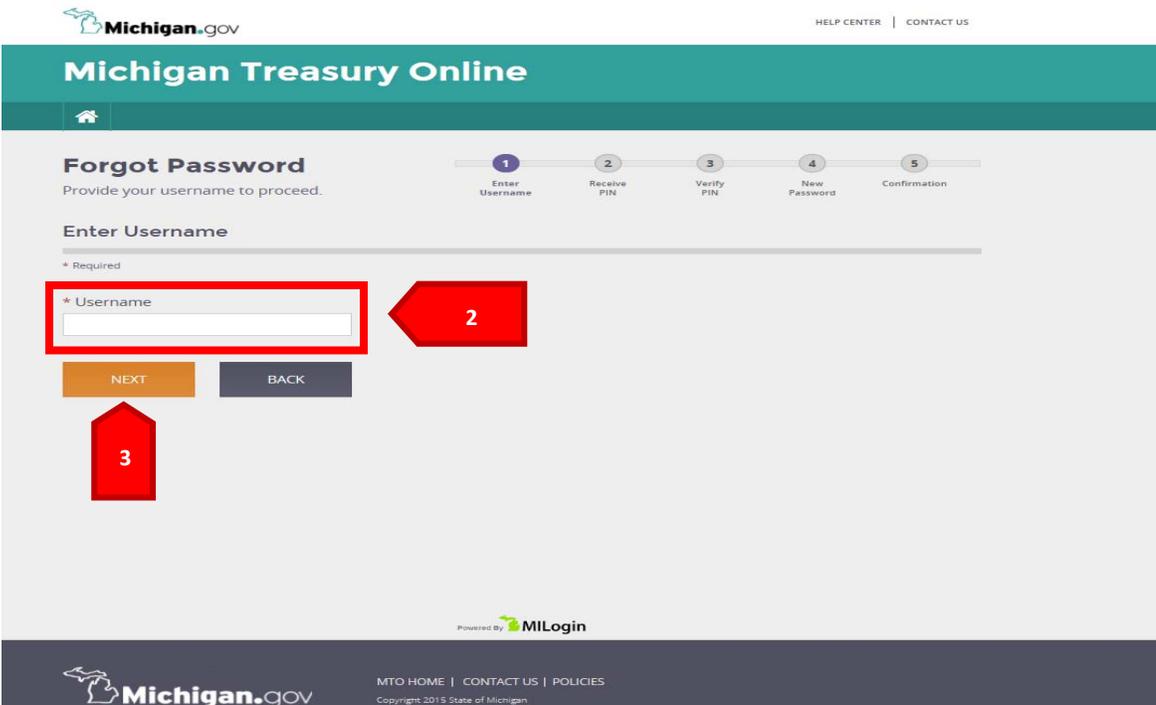
* Password [Forgot Password?](#)

LOG IN

Powered By MILogin

2. Enter your **Username**

3. Select **Next**



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HELP CENTER | CONTACT US

Michigan Treasury Online

Forgot Password

Provide your username to proceed.

1 Enter Username 2 Receive PIN 3 Verify PIN 4 New Password 5 Confirmation

Enter Username

* Required

* Username

NEXT BACK

3

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 **Note:** Selecting the **Back** button takes you to the log in screen.

4. Select the **Email** or **Mobile** button depending on how you wish to receive a Personal Identification Number to reset your password. Mobile number will not display if you did not provide a mobile number when setting up your MTO User Profile.
5. Select **Next**.

Michigan Treasury Online



Forgot Password

To verify your identity, please choose one option from the option(s) listed below.



Receive Personal Identification Number (PIN)

* Required

4

Email You will receive a PIN via an e-mail on your e-mail id 'b*****@yahoo.com'

5

NEXT

START OVER

Powered By MILogin



Note: If a user selects **Email**, a confirmation is emailed to the email address on file (image of email below). If a user selects **Mobile**, a confirmation is sent to the cellular number on file.

Reply Reply All Forward IM



Tue 11/3/2015 4:13 PM

DONOTREPLY-MILogin@michigan.gov

Regarding your Michigan Treasury Online Account

To

Hello,

Pursuant to your request, please use the following personal identification number(PIN) to reset your forgotten password.

595915409

Note: This PIN will expire in 5 minutes.

If you are facing any issues, please contact the Client Service Center at 517-241-9700 or 1-800-968-2644 for further assistance.

Thanks,
MILogin Team

6. Check your email or mobile phone to view the Personal Identification Number (PIN) sent to you
 - Enter the PIN that was sent to you
 - This PIN can be copied and pasted into the PIN field in MTO



Note: The PIN expires within 5 minutes after it is delivered to your email.

7. Select **Next**.

Michigan Treasury Online



Forgot Password

Please enter the PIN to validate your identity.



Verify Personal Identification Number (PIN)

* Required

* Personal Identification Number (PIN)

6

If you did not receive your PIN or if you want to choose a different method, click BACK button.

7

8. Enter your new **Password** using the established Password guidelines.
9. Confirm your **Password**.
10. Select **Submit**.

 **Note:** You will receive a screen notification that your password has been successfully reset.

 Another way to change your password: Select the **CHANGE YOUR PASSWORD** option from the drop-down under your name in the top right-hand corner of the screen and follow the prompts.

Establishing a Relationship with a Business:

Old Process	New Process (Effective January 2016)
<ul style="list-style-type: none">• Only the business owner can enter into MBOS and give/delegate account access to a 3rd party user (such as a CPA, an Association member, etc.)• As part of the delegation process, the user seeking access can wait several days to receive a PIN in the mail	<ul style="list-style-type: none">• A 3rd party user (<i>with the business' permission</i>) can establish a relationship (or self-delegate) to a business• The delegation process requires less steps due to enhanced shared secret authentication and elimination of sending the one-time access code via paper mail

There is a simplified process for establishing a relationship to a business. ***The first time a user establishes their (first) relationship to a business, the user is emailed a one-time access code.*** Going forward, the user will not have to enter an access code if and when establishing a relationship to another business. Anytime a user establishes a relationship to a business, a **User Role** must be selected.

There are six types of User Roles:

1. **Manage Registration Information**
2. **Sales Tax**
3. **Use Tax**
4. **Withholding**
5. **Essential Services Assessment**
3. **Fast File Now**

Each time a user creates a **New Business Relationship**, he/she will be able to select a **User Role**.



Users must have the FEIN of the business they are establishing a relationship to.

The screenshot shows the Michigan Treasury Online (MTO) website interface. At the top, there is a navigation bar with the Michigan.gov logo, a 'HELP CENTER | CONTACT US' link, and a user profile dropdown for 'SUZANNE BLU'. Below this is a teal header with 'Michigan Treasury Online' and a home icon. The main content area is titled 'Michigan Treasury Online Home' and includes instructions: 'Select a business card to perform transactions on behalf of the selected business. To establish access rights to a business not listed, select "Create a New Business Relationship". If you would like to file now without creating a business relationship, click the "Fast File Now" button.' Below the instructions is a search bar labeled 'Your Businesses' with a search icon and a 'FAST FILE NOW' button. A red box highlights a button with a plus sign icon and the text 'CREATE A NEW BUSINESS RELATIONSHIP'. At the bottom, there is a footer with the Michigan.gov logo, 'MTO HOME | CONTACT US | POLICIES', and 'Copyright 2014 State of Michigan'.

User Roles:

In the new MTO application, Sales, Use, and Withholding (SUW) taxpayers have five user roles to select from when establishing a relationship to a business:

- **Manage Registration Information-** manage rights for business Registration functions only. This role allows a user to electronically add and update business registration information.
- **Sales Tax-** This role allows a user to file, pay, amend, print and view current and previously filed Sales tax returns.
- **Use Tax-** This role allows a user to file, pay, amend, print and view current and previously filed Use tax returns.
- **Withholding Tax-** This role allows a user to file, pay, amend, print and view current and previously filed Withholding tax returns.
- **Essential Services Assessment (ESA)** – This role allows a user to file and pay ESA tax. ESA is a state-specific tax on eligible personal property owned by, leased to or in the possession of an eligible claimant who has claimed the eligible manufacturing personal property (EMPP) tax exemption. For more information on ESSA, visit our [website](#).

Michigan.gov

HELP CENTER | CONTACT US | SUZANNE BLU -

Michigan Treasury Online

Verify Business Relationship

Fill in all of the information below to verify a business relationship.

1 Business Details ✓ | 2 Filing Information | 3 Verify Business | 4 Enter Access Code

Filing Information

* Required

* Which tax related functions and/or filings will you perform for the business? (select all that apply)

- Manage Registration Information
- Sales Tax
- Use Tax
- Withholding Tax
- Essential Services Assessment (ESA)

NEXT | BACK | CANCEL ✕

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After a user selects a user role, he/she will be prompted to answer security questions to authenticate the business. If multiple roles are selected, the user may be prompted to answer both business registration and tax related security questions for authentication.

Michigan.gov

HELP CENTER | CONTACT US | SUZANNE BLU -

Michigan Treasury Online

Verify Business Relationship

Fill in all of the information below to verify a business relationship.

1 Business Details ✓ | 2 Filing Information ✓ | 3 Verify Business | 4 Enter Access Code

Security Questions

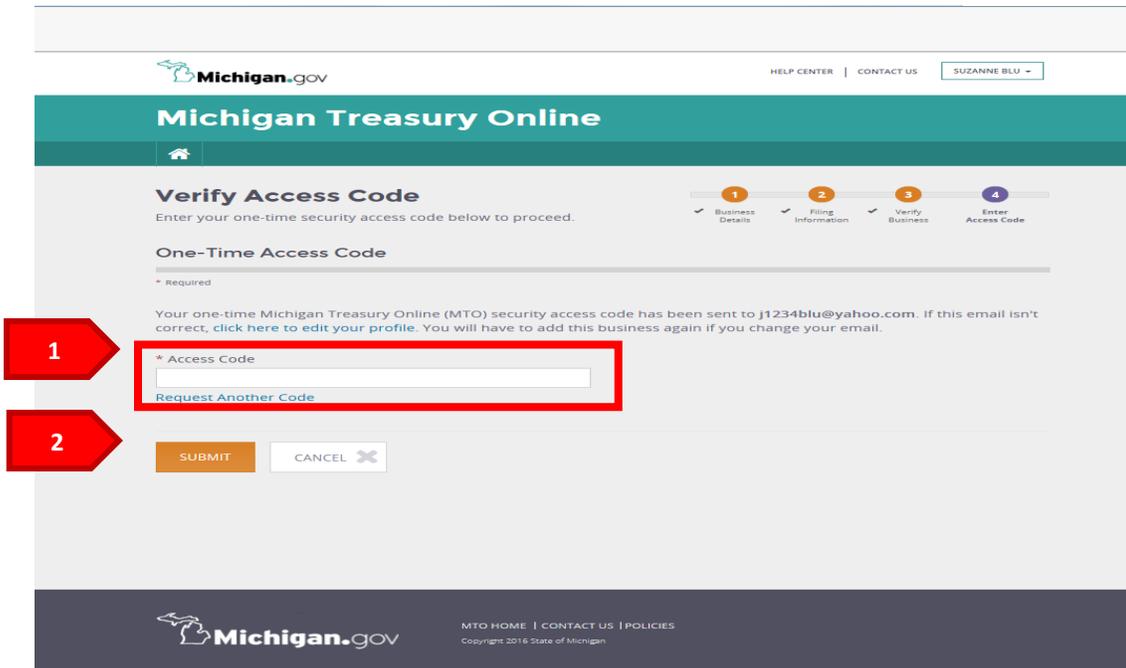
Answer all of the following questions.

* Required

Security questions are hidden for authentication purposes

 **Note:** The first time a user adds the initial (first) business account to his/her profile, the user is emailed an access code, which they will enter into the **Access Code** filed.

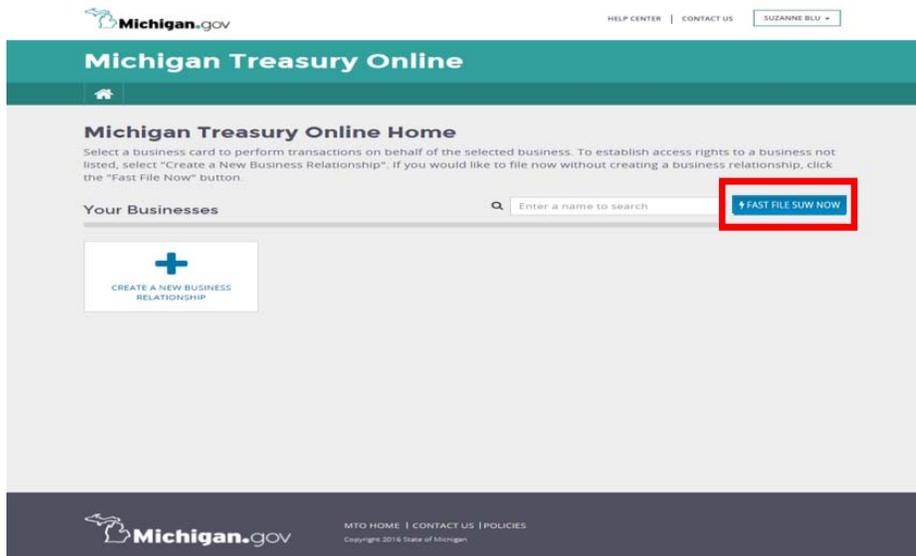
1. Enter the **Access Code**
2. Select **Submit**



Once a user enters the new correct **Access Code**, the user can view and access the profile of the newly added business.

Fast File SUW Now is the sixth user role. A business relationship is not established therefore shared secret questions are not answered and an access code is not received when a user elects to use Fast File Now.

- **Fast File SUW Now**- a guest access where no business relationship is established. With Fast File SUW Now, there are limited capabilities; the user is restricted to simply filing and paying a Sales, Use and Withholding tax return. The user is not able to amend, view or print returns.



See **Learning Series 3** for additional detailed instructions and information on the three types of user roles/access types.



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.