



LOUISIANA
DEPARTMENT *of* REVENUE

LaTAP
Tax Preparer
User Guide

Version: 2





Table of Contents

Request Third-Party Access for Individuals	4
1. Requirements Information	4
2. Taxpayer Type	4
3. Taxpayer Information	5
4. Review and Submit	5
5. Confirmation	6
6. Printable View	6
1. Requirements Information	8
2. Taxpayer Type	8
3. Taxpayer Information	8
4. Review and Submit	8
Access Individual Client Accounts	9
Request Third-Party Access for Businesses	9
1. Requirements Information	9
2. Taxpayer Type	10
3. Taxpayer Information	10
.....	11
4. Review and Submit	11
5. Confirmation	12
6. Client Notification Letter	12
Access Client Business Accounts	13
Add Firm Information	14
1. Instructions	14
.....	14
2. Edit Information	15
3. Review	15

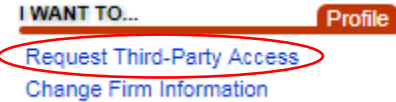


Edit Firm Information	16
1. Instructions.....	16
2. Change Type.....	16
3. Edit Information	16
4. Review	17
Remove Firm Information.....	18
1. Instructions.....	18
2. Change Type.....	18
3. Review	18
Update Profile	19
Manage Third-Party Access	20
Update Names and Addresses.....	21
1. Legal Name	21
2. Addresses	22
Sorting Columns.....	23



Request Third-Party Access for Individuals

To request third-party access for an individual, you and your client must have LaTAP accounts. Log in to your LaTAP account. In the I WANT TO... list, click the **Request Third-Party Access** hyperlink.



1. Requirements Information

Confirm that you have the required information before you proceed. To proceed, click the **Next** button.



Requirements Information

For Businesses	For Individuals	Begin Request
<ul style="list-style-type: none">• Client account type• Client account number• Client zip code• One of your client's last five payments	<ul style="list-style-type: none">• Client last name• Client SSN• Once these are provided the client will be sent a letter. They will be prompted to contact you with the provided letter ID within 30 days.• Start a new submission, using all the above information.• Client filing status	<ul style="list-style-type: none">• Click the Next button to begin the request for third-party access.
Cancel		Previous Next

2. Taxpayer Type

Select the *Individual* option for the type of account you would like to add. Then, click the **Next** button.



Taxpayer Type

What type of account are you trying to access?

Individual

Business

[Cancel](#) [Previous](#) [Next](#)



3. Taxpayer Information

Complete the **Client Last Name** and **Client SSN** fields. Click the **Next** button.

1. Requirements Information > 2. Taxpayer Type > 3. Taxpayer Information > 4. Review and Submit

Taxpayer Information

Enter the required information:

Client Last Name

Client SSN

4. Review and Submit

Review the information you have entered. Click the **Submit** button.

1. Requirements Information > 2. Taxpayer Type > 3. Taxpayer Information > 4. Review and Submit

Review and Submit

Review the following information before submission:

Client Last Name

Client SSN

A window is displayed requesting your password to complete the process. Complete the **Password** field and click **OK**.

✕

Please enter your password.

Password



5. Confirmation

A confirmation window and number are displayed. To print this information, click the **Printable View** button. Another tab is displayed in your browser.

Your request has been submitted and your confirmation number is 1-649-431-936.

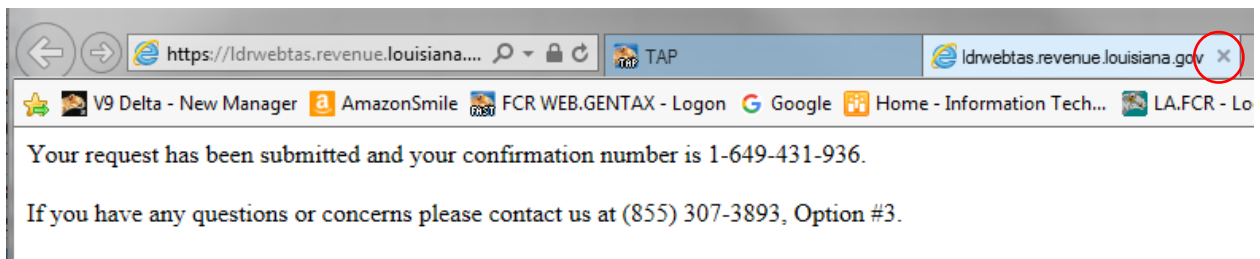
If you have any questions or concerns please contact us at (855) 307-3893, Option #3.



6. Printable View

Right-click in the window and select *Print*. Print the window.

Click the Close icon in the upper right-hand corner to close the tab you just printed from.



Click the **OK** button to return to the navigation page.

The taxpayer will receive a letter notifying them of your request to access their account on LaTAP. To complete third-party access requests for the individual, you need the letter ID from the taxpayer. The letter instructs the taxpayer to contact you within 30 days with the letter ID. If the taxpayer fails to contact you within 30 days, you will need to resubmit your request.



LOUISIANA

DEPARTMENT *of* REVENUE



[REDACTED]
HOUMA LA 70364-1820

Date of Notice: November 02, 2017
Letter ID: L0678957664
Social Security #: XXX-XX [REDACTED]

Dear Louisiana Taxpayer:

Your tax practitioner has requested access to your individual income tax account through the Louisiana Taxpayer Access Point (LaTAP).

[REDACTED]
FAKE FIRM
617 N 3RD ST
BATON ROUGE LA 70802-5431
(225) 291-1234
test@test.com

To complete this request, your tax practitioner will need the letter identification number in the top right corner of this letter along with the filing status from your most recent Louisiana Individual Income Tax Return. Granting access to your individual income tax account through LaTAP allows your tax practitioner to view period balances, make payments, request copies of returns, and view letters the Louisiana Department of Revenue (LDR) has mailed to your address.

If you wish to grant third-party access to your account, please contact your tax practitioner to provide the letter identification number & your most recent filing status. Without this information, third-party access to your individual income tax account will not be granted. If you feel you have received this letter in error, you may disregard and destroy this letter. Your account is secure, and you remain the only party with access.

The request for third-party access and this letter identification number will expire thirty (30) days from the date of this notice.

You may contact LDR at 855-307-3893 with any questions.

Respectfully,
Louisiana Department of Revenue



Once you have received the letter ID from your client, click the **Request Third-Party Access** hyperlink in the I WANT TO... section on the main navigation screen. This process guides you through the same steps you went through before: Requirements Information, Taxpayer Type, Taxpayer Information, and Review and Submit.

1. Requirements Information

Review the Requirements Information window. Click **Next**.

2. Taxpayer Type

Select *Individual*. Click **Next**.

3. Taxpayer Information

Complete the **Client Last Name** and **Client SSN** fields. Enter the letter ID the client provided you and the client's filing status in the appropriate fields. Click **Next**.



Taxpayer Information

Enter the required information:

Client Last Name	<input type="text" value="JONES"/>
Client SSN	<input type="text" value="***-**-1618"/>
Letter ID	<input type="text" value="L1258648160"/>
Client Filing Status	<input type="text" value="1. Single"/>



4. Review and Submit

Review the information on the Review and Submit window. Click **Submit**.



Review and Submit

Review the following information before submission:

Client Last Name	<input type="text" value="JONES"/>
Client SSN	<input type="text" value="***-**-1618"/>
Letter ID	<input type="text" value="L1258648160"/>
Client Filing Status	<input type="text" value="1. Single"/>





A new window is displayed requesting your password to complete the process. Complete the **Password** field to confirm your submission. Click **OK**.

A confirmation window is displayed. You now have third-party access to the individual's account.

Access Individual Client Accounts

From the LaTAP homepage, you can access individual client accounts by viewing the **Accounts** tab, and then clicking the **Other Taxpayers' Accounts** sub-tab. Then, click the account ID hyperlink of the account you wish to view.

YOKO ONO		NAMES AND ADDRESSES		I WANT TO...	Profile
Preparer Tax ID #	238668	Legal Name	YOKO ONO	Request Third-Party Access	
My Balance	\$0.00	Location Address	617 N 3RD ST BATON ROUGE LA 7080	Change Firm Information	
Other Taxpayer Balance	\$444.36				

ACCOUNTS ¹	REQUESTS	NOTICES ⁰	LETTERS ⁰
MY ACCOUNTS ⁰	OTHER TAXPAYERS' ACCOUNTS ²		

OTHER TAXPAYERS' ACCOUNTS							Hide History	Filter
Account Id	Account Type	Name	Frequency	Address		Balance		
711-600	Individual In	JONES	Annual	RD PONCHATC		543.69		
001-400	Sales	SON	Quarterly	HWY BATON R		444.36		

2 Rows

Request Third-Party Access for Businesses

Requesting third-party access for a business account follows the same process as requesting access for an individual account. Log in to your LaTAP account. Click the **Request Third-Party Access** hyperlink in the I WANT TO... list on the navigation window.

I WANT TO... Profile

- [Request Third-Party Access](#)
- [Change Firm Information](#)

1. Requirements Information

Review the Requirements Information window. Click the **Next** button.



1. Requirements Information > 2. Taxpayer Type > 3. Taxpayer Information > 4. Review and Submit

Requirements Information

For Businesses

- Client account type
- Client account number
- Client zip code
- One of your client's last five payments

For Individuals

- Client last name
- Client SSN
- Once these are provided the client will be sent a letter. They will be prompted to contact you with the provided letter ID within 30 days.
- Start a new submission, using all the above information.
- Client filing status

Begin Request

- Click the **Next** button to begin the request for third-party access.

Cancel

Previous

Next

2. Taxpayer Type

Select the *Business* option. Click the **Next** button.

1. Requirements Information > 2. Taxpayer Type > 3. Taxpayer Information > 4. Review and Submit

Taxpayer Type

What type of account are you trying to access?

Individual

Business

Cancel

Previous

Next

3. Taxpayer Information

- Select your client's account type from the **Account Type** drop-down field.
- Enter your client's account number in the corresponding field.
- Enter your client's ZIP Code in the corresponding field.
- Enter your client's last payment amount in the corresponding field.



- 1. Requirements Information
- 2. Taxpayer Type
- 3. Taxpayer Information
- 4. Review and Submit

Taxpayer Information

Enter the required information:

Account Type	Sales
Account Number	██████-001
Zip Code	70807
Last Payment Amount	137.94

Cancel

Previous

Next

4. Review and Submit

Confirm that the information displayed on the Review and Submit window is correct. If it is incorrect, click the **Previous** button to edit your entries. When you have confirmed that the information is accurate, click **Submit**.

- 1. Requirements Information
- 2. Taxpayer Type
- 3. Taxpayer Information
- 4. Review and Submit

Review and Submit

Review the following information before submission:

Account Type	Sales
Account Number	██████-001
Zip Code	70807
Last Payment Amount	137.94

Cancel

Previous

Submit

A window is displayed requesting your password as confirmation that you wish to submit the request. Complete the **Password** field and click **OK**.



Please enter your password.

Password

OK Cancel

5. Confirmation

The displayed window confirms that your request has been submitted and provides you a confirmation number.

If you would like to print this information, click the **Printable View** button. If you would not like to print the information, click **OK** to return to the main navigation window.

Your request has been submitted and your confirmation number is 1-575-851-392.

If you have any questions or concerns please contact us at (855) 307-3893, Option #3.

OK **Printable View**

6. Client Notification Letter

Your client will receive the following letter notifying them that you have provided the information required to have third-party access to their LaTAP business account:



LOUISIANA

DEPARTMENT *of* REVENUE



SMITH [REDACTED]
BATON ROUGE LA 70807-[REDACTED]

Date of Notice: November 02, 2017
Letter ID: L0766775904
Account ID: [REDACTED]-001-400

Dear Louisiana Taxpayer:

Your tax practitioner has completed the required steps to gain third-party access to your Sales account through the Louisiana Taxpayer Access Point (LaTAP).

[REDACTED]
FAKE FIRM
617 N 3RD ST
BATON ROUGE LA 70802-5431
(225) 291-1234
test@test.com

Your practitioner was able to provide the information below, which was required for account access:

- Account/Tax Type
- 10-digit Account Number
- Zip Code
- Most Recent Payment Amount

Access to your account through LaTAP allows your tax practitioner to view historical information, make payments, file returns, and view or reprint letters the Louisiana Department of Revenue (LDR) has mailed to your business.

You may contact LDR at 855-307-3893 with any questions.

Respectfully,
Louisiana Department of Revenue

Access Client Business Accounts

You instantly receive access to your clients' business accounts. To access an account, view the **Accounts** tab, and then click the **Other Taxpayers' Accounts** sub-tab. Click the corresponding account ID hyperlink to view the account.



Louisiana Taxpayer Access Point

Menu [Log Off](#)

Home
[View Support ID](#)

Navigation
[My Accounts](#)

User Help
[Tax Preparer User Guide](#)

YOKO ONO

Preparer Tax ID # P012 [REDACTED] Legal Name [REDACTED]
My Balance \$0.00 Location Address 617 N 3RD ST BATON ROUGE LA 70801
Other Taxpayer Balance \$444.36

I WANT TO... [Profile](#)
[Request Third-Party Access](#)
[Change Firm Information](#)

ACCOUNTS⁰ **REQUESTS** **NOTICES⁰** **LETTERS⁰**

MY ACCOUNTS⁰ **OTHER TAXPAYER'S ACCOUNTS¹**

OTHER TAXPAYER'S ACCOUNTS [Hide History](#) [Filter](#)

Account Id	Account Type	Name	Frequency	Address	Balance
[REDACTED]001-400	Sales	[REDACTED]	Quarterly	[REDACTED] HWY BATON ROUGE LA 70801	444.36

The Account manager is displayed. From this navigation page, you can file returns, pay, view returns, print returns, view requests, view activity, view notices, view letters, change addresses, view pending payments, and make escrow payments.

Add Firm Information

To add your firm information, click **Change Firm Information** hyperlink in the I WANT TO... list on the navigation menu.

I WANT TO... [Profile](#)
[Request Third-Party Access](#)
[Change Firm Information](#)

1. Instructions

The first stage displays the instructions. Click **Next** to proceed to the next stage.

1. Instructions

Instructions

Click "Next" to change or delete the firm information below.

Current EFIN

Current Firm Name

[Cancel](#) [Previous](#) [Next](#)



2. Edit Information

Enter your new Electronic Filing Identification Number (EFIN) and firm name in the corresponding fields. Click **Next**.

1. Instructions > 2. Edit Information

Edit Information

Enter your new information below.

New EFIN	<input type="text" value="123456"/>
New Firm Name	<input type="text" value="NEW FIRM NAME"/>

3. Review

Review the window and confirm that the information entered is correct. Click **Submit**.

1. Instructions > 2. Edit Information > 3. Review

Review

Please review and confirm the information being changed is correct.

New EFIN	<input type="text" value="123456"/>
New Firm Name	<input type="text" value="NEW FIRM NAME"/>

A confirmation window is displayed requesting your password as confirmation that you wish to add the information. Complete the **Password** field and click **OK**.

✕

Please enter your password.

Password	<input type="password" value="*****"/>
----------	--

A confirmation page is displayed. Click **OK** to return to the main navigation page.



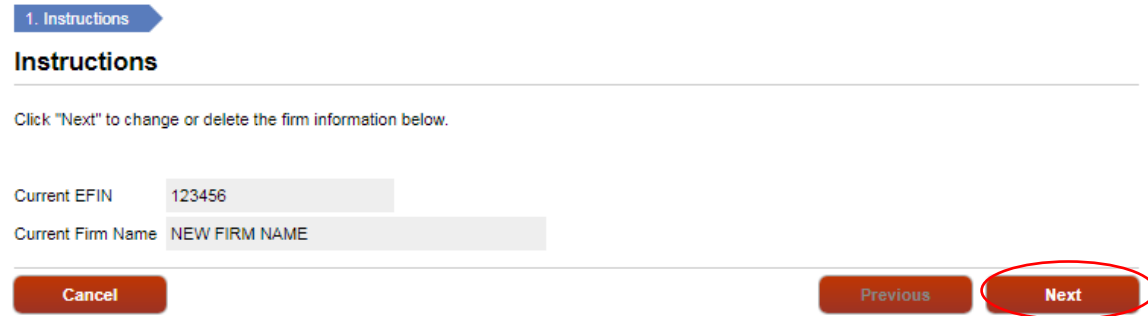
Edit Firm Information

To change your firm information, click the **Change Firm Information** hyperlink in the I WANT TO... list on the navigation menu.



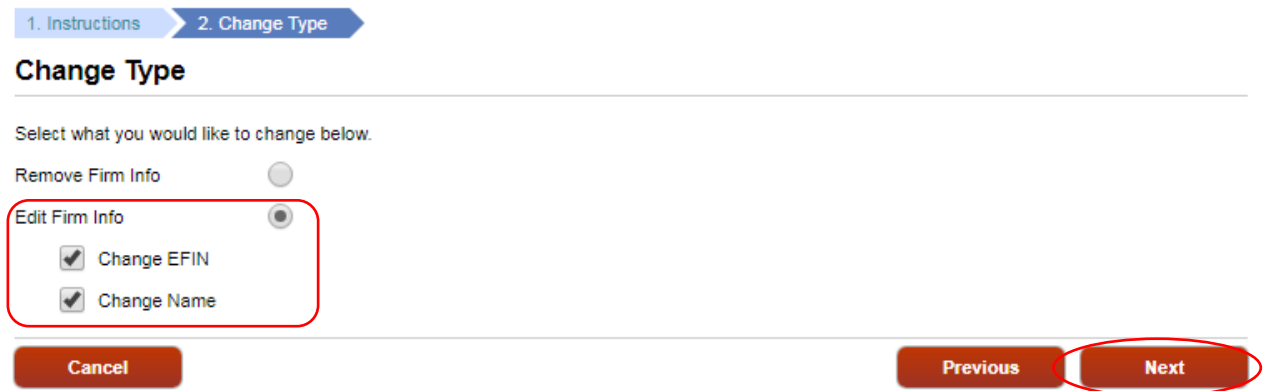
1. Instructions

The first stage displays the instructions. Click **Next** to proceed to the next stage.



2. Change Type

Select the *Edit Firm Info* option. Then, select the check box(es) that correspond to the information you want to change—the EFIN and/or the firm name. Click the **Next** button.



3. Edit Information

Enter your new information in the corresponding fields. Click **Next**.



1. Instructions 2. Change Type 3. Edit Information

Edit Information

Enter your new information below.

Current EFIN	<input type="text" value="123456"/>
New EFIN	<input type="text" value="654321"/>
Current Firm Name	<input type="text" value="NEW FIRM NAME"/>
New Firm Name	<input type="text" value="FIRM TWO"/>

4. Review

Review the page and confirm that the information entered is correct. Click **Submit**.

1. Instructions 2. Change Type 3. Edit Information 4. Review

Review

Please review and confirm the information being changed is correct.

Current EFIN	<input type="text" value="123456"/>
New EFIN	<input type="text" value="654321"/>
Current Firm Name	<input type="text" value="NEW FIRM NAME"/>
New Firm Name	<input type="text" value="FIRM TWO"/>

A confirmation window is displayed requesting your password as confirmation that you wish to edit the information. Complete the **Password** field and click **OK**.

✕

Please enter your password.

Password

A confirmation page is displayed. Click **OK** to return to the main navigation page.

Your request has been submitted and your confirmation number is 1-952-173-440.

If you have any questions or concerns please contact us at (855) 307-3893, Option #3.



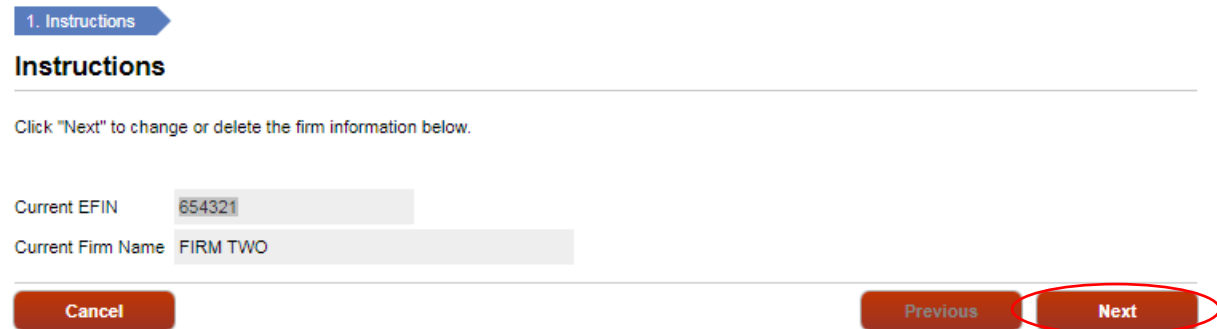
Remove Firm Information

To remove your firm information, click **Change Firm Information** hyperlink in the I WANT TO... list on the navigation menu.



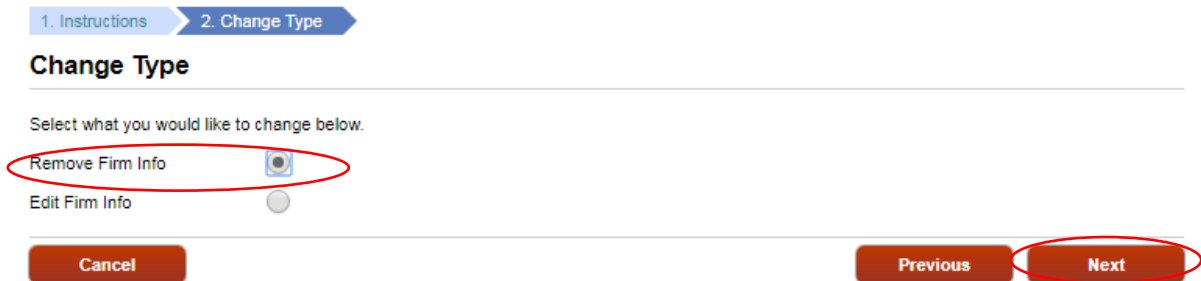
1. Instructions

The first stage displays the instructions. Click **Next** to proceed to the next stage.



2. Change Type

Select the *Remove Firm Info* option if you wish to remove your EFIN and firm name. Click **Next**.



3. Review

Review the page and confirm that the information being removed is correct. Click **Submit**.



1. Instructions > 2. Change Type > 3. Review

Review

Please review and confirm the information being changed is correct.

Current EFIN	<input type="text" value="654321"/>
New EFIN	<input type="text"/>
Current Firm Name	<input type="text" value="FIRM TWO"/>
New Firm Name	<input type="text"/>

A confirmation window is displayed requesting your password as confirmation that you wish to remove the information. Complete the **Password** field and click **OK**.



Please enter your password.

Password

A confirmation page is displayed. Click **OK** to return to the main navigation page.

Your request has been submitted and your confirmation number is 0-207-342-976.

If you have any questions or concerns please contact us at (855) 307-3893, Option #3.

Update Profile

To update your profile, view the **Profile** tab in the I WANT TO... section on the navigation menu.

- I WANT TO...
- [Request Third-Party Access](#)
- [Change Firm Information](#)

The Profile tab is displayed. Click the **Update My Profile** hyperlink in the I WANT TO... list.

- I WANT TO...
- [Change My Password](#)
-



The Profile window is displayed. You may edit any of the information that is not grayed out. Click **Save**.

Profile [X]

PROFILE

Web Login	[REDACTED]	Country	USA	Type	Business
Individual Name	BOB JONES	Phone 1	(222) 555-2222	Extension	
Email	CPABOB@TEST.COM	Country	USA	Type	
Secret Question	What is your favorite animal?	Phone 2			
New Question	What city were you born in?				
Answer	*****				
Confirm	*****				

AUTHENTICATION CONTACT

Send Authentication Text Email

Send Authentication Email

Send Text or Email

Save **Cancel**

Manage Third-Party Access

To manage third-party access, view the **Profile** tab in the I WANT TO... list on the navigation menu.

- I WANT TO...**
- Profile**
 - [Request Third-Party Access](#)
 - [Change Firm Information](#)

The Profile tab is displayed. View the **Manage Logons** tab, and then click the **3rd Party Access** sub-tab. Select the access level hyperlink of the desired account to manage your access.

MY ACCOUNTS OTHER TAXPAYER'S ACCOUNTS **MANAGE LOGONS**

LOGONS **3RD PARTY ACCESS** SETTINGS

ACCESS TO 3RD PARTY ACCOUNTS Hide History Filter

Web Logon	Access Type	Name	Account Id	Account Type	Access Level	Active
[REDACTED]	Third Party	[REDACTED] UNIFORMS	[REDACTED] 002-400	Sales	File & Pay	<input checked="" type="checkbox"/>
[REDACTED]		[REDACTED] STORE	[REDACTED] 001-400	Sales	File & Pay	<input checked="" type="checkbox"/>
[REDACTED]		[REDACTED] INC	[REDACTED] 001-400	Sales	File & Pay	<input checked="" type="checkbox"/>
[REDACTED]		[REDACTED] ULTIMATE	[REDACTED] 001-400	Sales	File & Pay	<input checked="" type="checkbox"/>

4 Rows



The Edit Access Level window is displayed. Clear the **Active** check box and click the **OK** button.

Edit Access Level [X]

EDIT ACCESS LEVEL

BOB JONES

[Redacted]

Sales - [Redacted]-400

Access Level File & Pay

Active

Periods this logon has access to:

All Periods

Periods From [Redacted]

Periods From [Redacted] To [Redacted]

OK **Cancel**

Your third-party access is removed from this account. To regain access, you must navigate through the request process again.

Web Logon	Access Type	Name	Account Id	Account Type	Access Level	Active
[Redacted]	Third Party	[Redacted]	[Redacted]-400	Sales	File & Pay	<input type="checkbox"/>
[Redacted]	[Redacted]	[Redacted]	[Redacted]-400	Sales	File & Pay	<input checked="" type="checkbox"/>

Update Names and Addresses

1. Legal Name

Click the hyperlink of your legal name in the Names and Addresses list on the Profile navigation window.

NAMES AND ADDRESSES

Legal Name [Redacted]

Location Address [Redacted] [RD SHREVEPORT LA 7](#)

The My Accounts window is displayed. View the **Edit** tab in the top right-hand corner.



My Accounts ✕

NAME

Legal : [REDACTED] Edit

Enter your new legal name in the **Name** field. Click **Submit**.

My Accounts ✕

NAME

Legal : [REDACTED]

NAME CHANGE REQUEST

Type Legal

Name

Submit Cancel

A confirmation window is displayed. Click **OK** return to the Profile navigation window.

My Accounts ✕

Your request to change your **Legal Name** has been submitted and your confirmation number is 0-559-140-224.
Please note that your request may take several days to process.

If you have any questions or concerns please contact us at www.revenue.louisiana.gov.

OK Printable View

2. Addresses

On the Accounts navigation window, click the hyperlink of your location address in the Names and Addresses list.

NAMES AND ADDRESSES

Legal Name [REDACTED]

Location Address [REDACTED] [SHREVEPORT LA 7](#)

The My Accounts window is displayed. View the **Edit** tab in the top right-hand corner.

My Accounts ✕

ADDRESS DETAIL

Location : [REDACTED] SHREVEPORT LA 71106 [REDACTED] Edit



Enter your new address in the fields provided. Verify the address by clicking the **Verify Address** hyperlink.

My Accounts [Close]

ADDRESS DETAIL

Location : [Redacted] RD SHREVEPORT LA 71106-[Redacted]

ADDRESS CHANGE REQUEST

Country: USA [Dropdown] [Verify Address](#)

Street: 123 MAIN ST

Unit Type: [Dropdown] Unit #: [Text] City: BATON ROUGE

State: LOUISIANA [Dropdown] Zip Code: *Required* Prsh/County: EAST BATON ROUGE [Dropdown]

Attention: [Text]

Save **Cancel**

Click the **Select** hyperlink next to the correct address. Click **Save**.

Address Search [Close]

Country: USA [Dropdown] Unverified

Street: 123 MAIN ST

Unit Type: [Dropdown] Unit #: [Text] City: BATON ROUGE

State: LOUISIANA [Dropdown] Zip: *Required* Prsh/County: EAST BATON ROUGE [Dropdown]

Attention: [Text]

SELECT ADDRESS

Select	Verified	123 MAIN ST BATON ROUGE LA 70801-1902
------------------------	----------	---------------------------------------

Cancel

A confirmation window is displayed. Click **OK** to return to the Accounts navigation window.

Sorting Columns

To sort by a column in LaTAP, you may click the title of the column. For example, when you click the title of the **Return Status** column, each period is sorted by its return status.



PERIODS REQUESTS ACTIVITY NOTICES⁰ LETTERS⁹

PERIOD LIST

PERIODS FROM NOV-14-2014 Change Date Show History Filter

Period	Return Status			Tax	Penalty	Interest	Credits	Balance	Messages
Sep-30-2017	File Now	Pay		0.00	0.00	0.00	0.00	0.00	File Return
Dec-31-2017	File Now	Pay		0.00	0.00	0.00	0.00	0.00	
Jun-30-2016	Late-Processed	View Return	Pay	68.00	3.00	0.00	71.00	0.00	
Mar-31-2015	Late-Processed	View Return	Pay	0.00	0.00	0.00	0.00	0.00	
Jun-30-2015	Ontime-Processed	View Return	Pay	34.00	0.00	0.00	34.00	0.00	
Sep-30-2015	Ontime-Processed	View Return	Pay	26.00	0.00	0.00	26.00	0.00	
Dec-31-2014	Ontime-Processed	View Return	Pay	0.00	0.00	0.00	0.00	0.00	

To divide the columns into sortable groups, hold **Shift** on your keyboard and click the column name. For example, holding **Shift** on your keyboard and clicking the title of the **Return Status** column divides all the periods divided by their return statuses.

PERIODS REQUESTS ACTIVITY NOTICES⁰ LETTERS⁹

PERIOD LIST

PERIODS FROM NOV-14-2014 Change Date Show History Filter

Return Status	Period			Tax	Penalty	Interest	Credits	Balance	Messages
	Sep-30-2017	File Now	Pay	0.00	0.00	0.00	0.00	0.00	File Return
	Dec-31-2017	File Now	Pay	0.00	0.00	0.00	0.00	0.00	
2 Rows									
	Mar-31-2015	View Return	Pay	0.00	0.00	0.00	0.00	0.00	
	Jun-30-2016	View Return	Pay	68.00	3.00	0.00	71.00	0.00	
2 Rows									
	Dec-31-2014	View Return	Pay	0.00	0.00	0.00	0.00	0.00	
	Jun-30-2015	View Return	Pay	34.00	0.00	0.00	34.00	0.00	

If you need assistance, please call the Louisiana Department of Revenue's Customer Service Division at 855-307-3893. Select option 3.