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

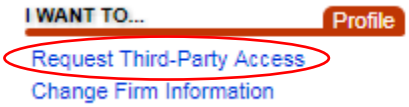
Manage Third-Party Access 20

Update Names and Addresses 21
1. Legal Name 21
2. Addresses 22

Sorting Columns 23

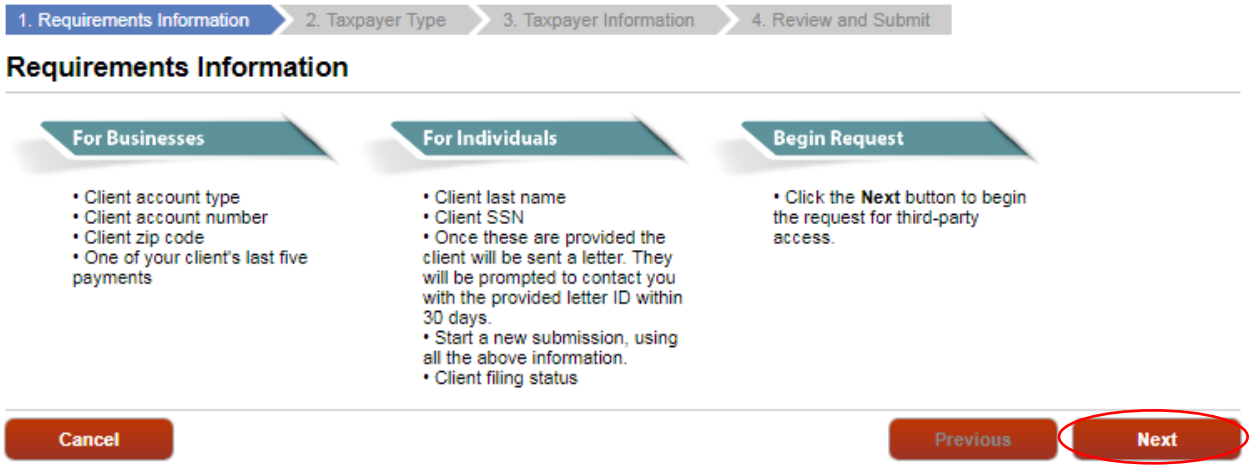
Request Third-Party Access for Individuals

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.



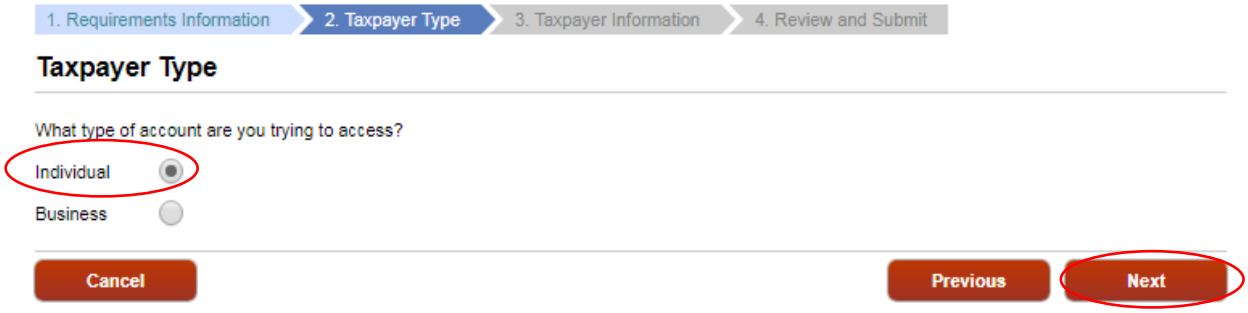
1. Requirements Information

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



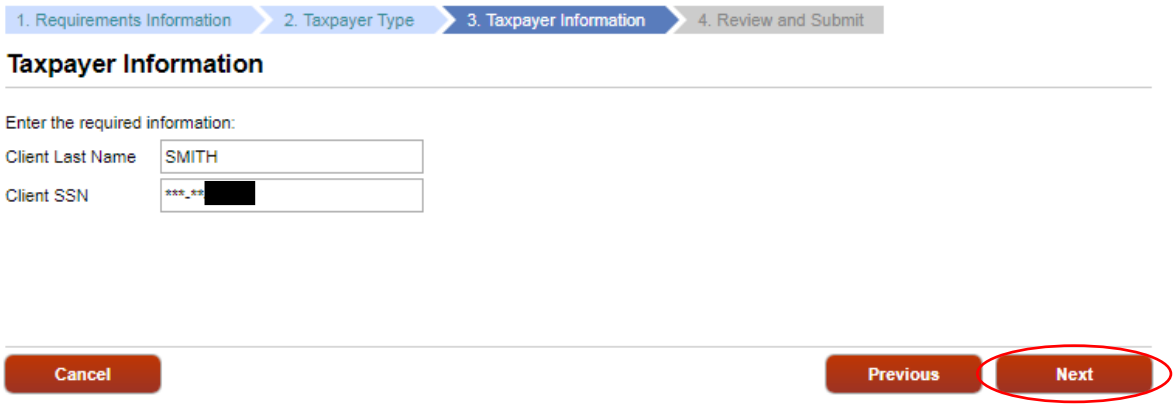
2. Taxpayer Type

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



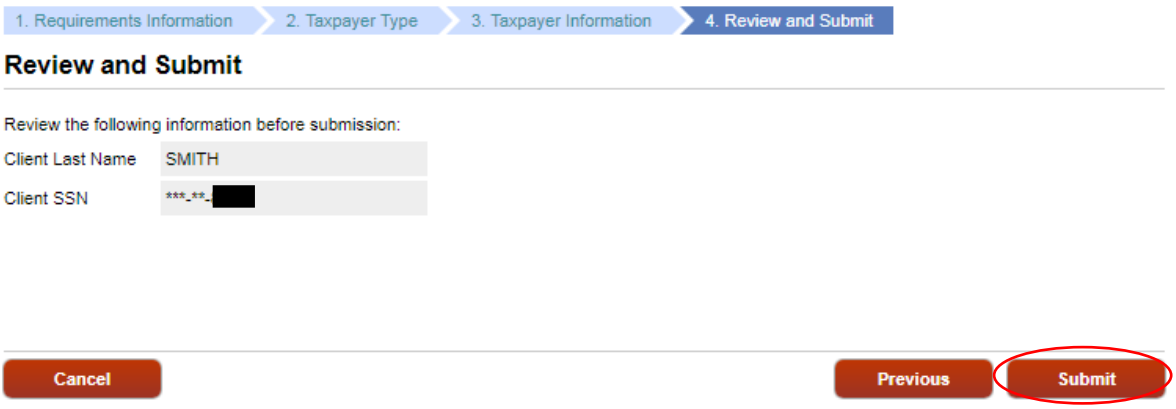
3. Taxpayer Information

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

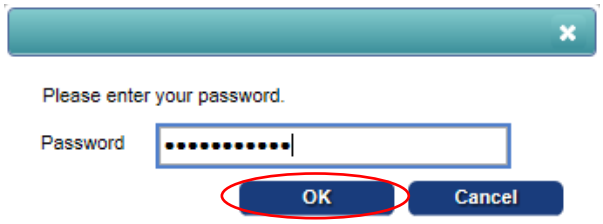


4. Review and Submit

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

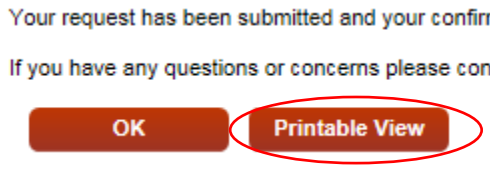


A window is displayed requesting your password to complete the process. Complete the **Password** field and click **OK**.



5. Confirmation

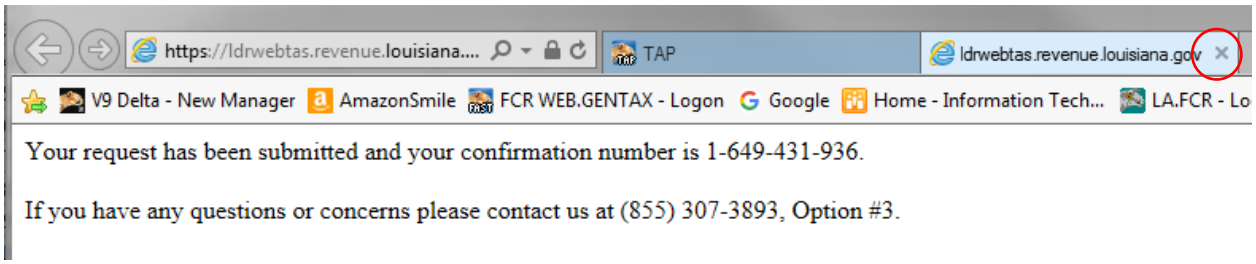
A confirmation window and number are displayed. To print this information, click the **Printable View** button. Another tab is displayed in your browser.



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]

Not Printed

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

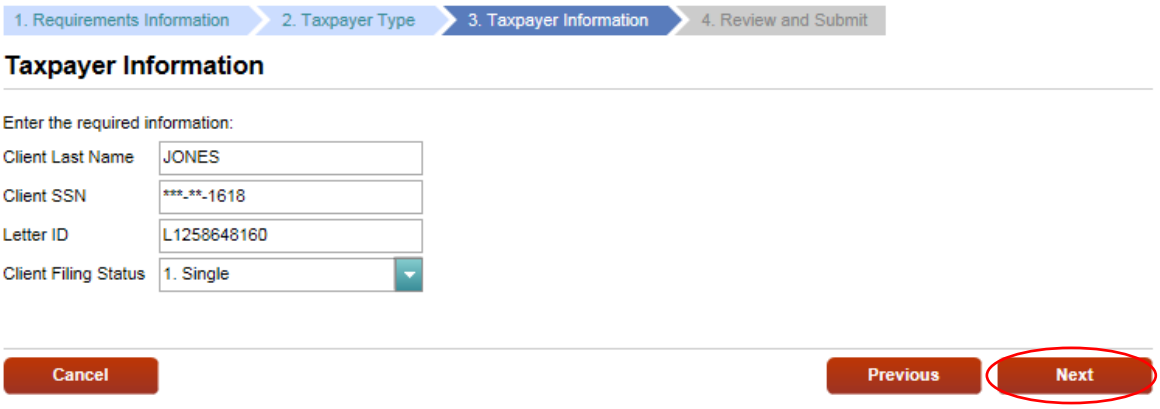
Review the Requirements Information window. Click **Next**.

2. Taxpayer Type

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

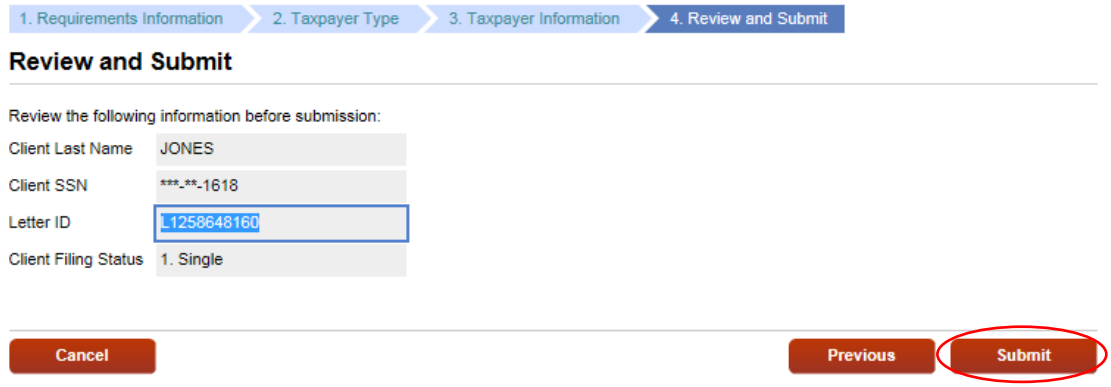
3. Taxpayer Information

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.**

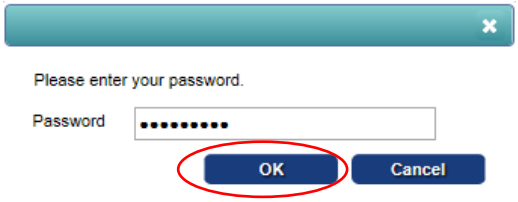


4. Review and Submit

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



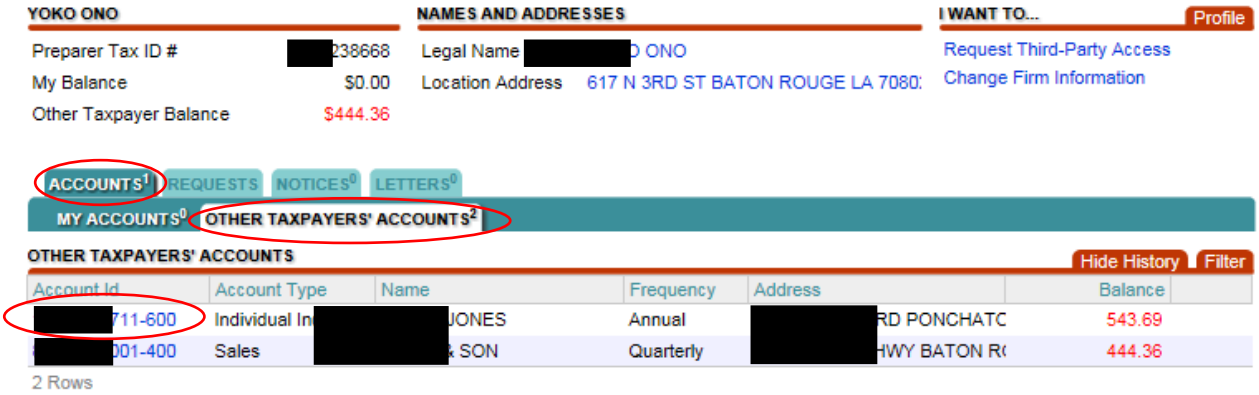
A new window is displayed requesting your password to complete the process. Complete the **Password** field to confirm your submission. Click **OK.**



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.

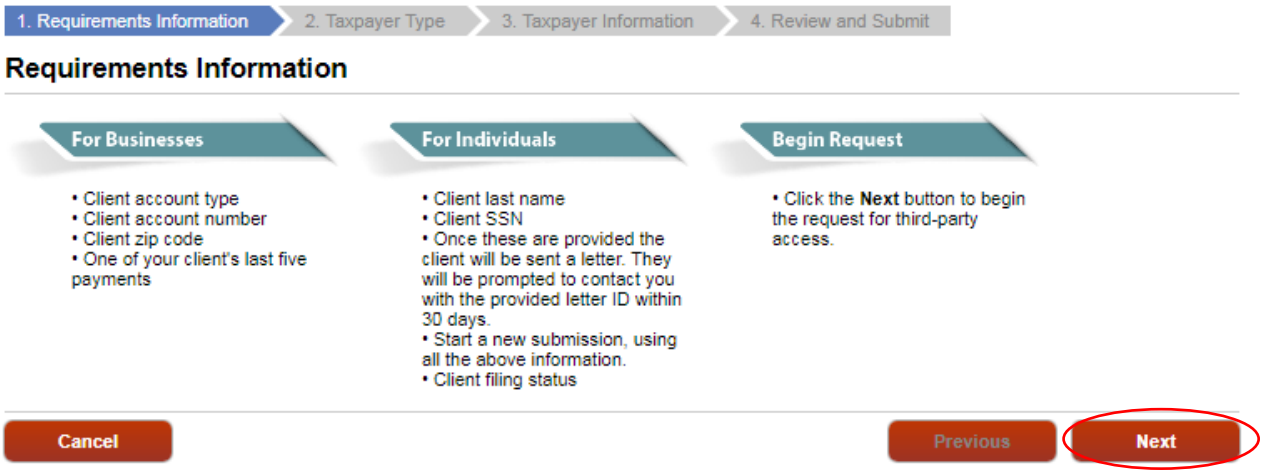


Request Third-Party Access for Businesses

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.

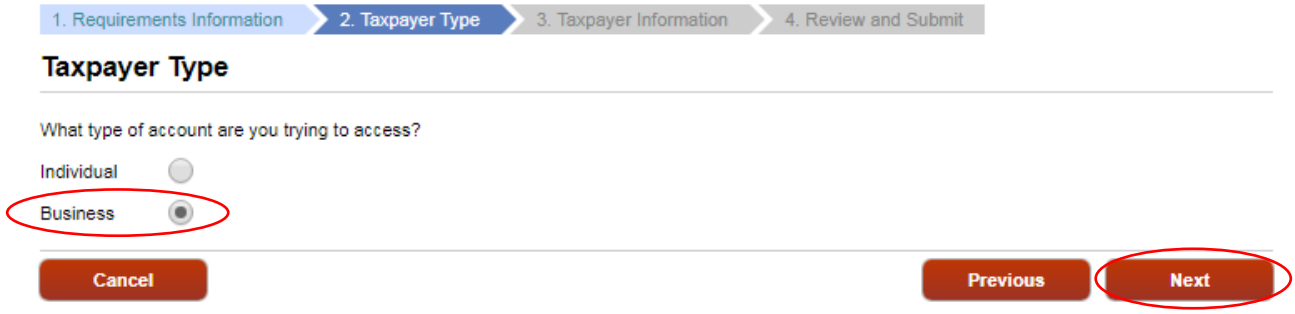
1. Requirements Information

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



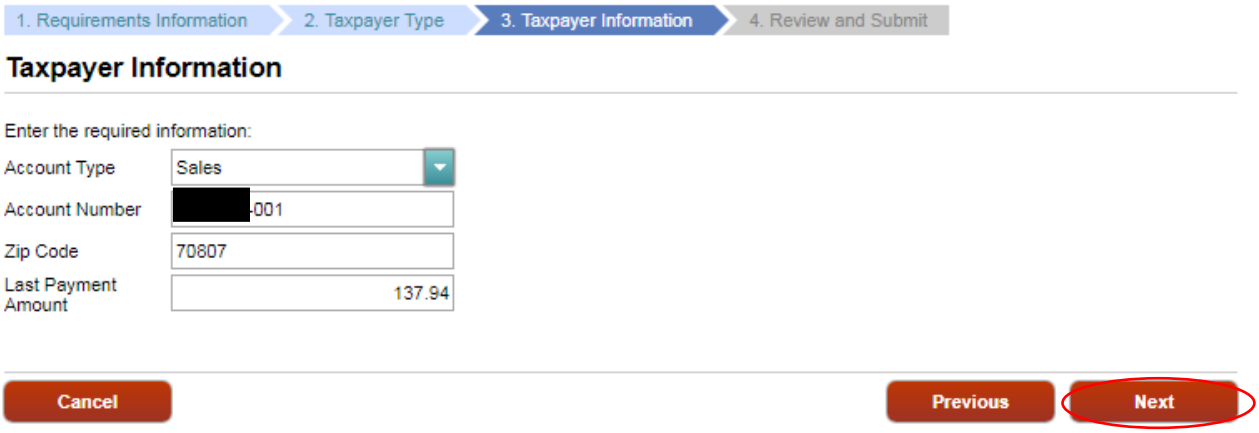
2. Taxpayer Type

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



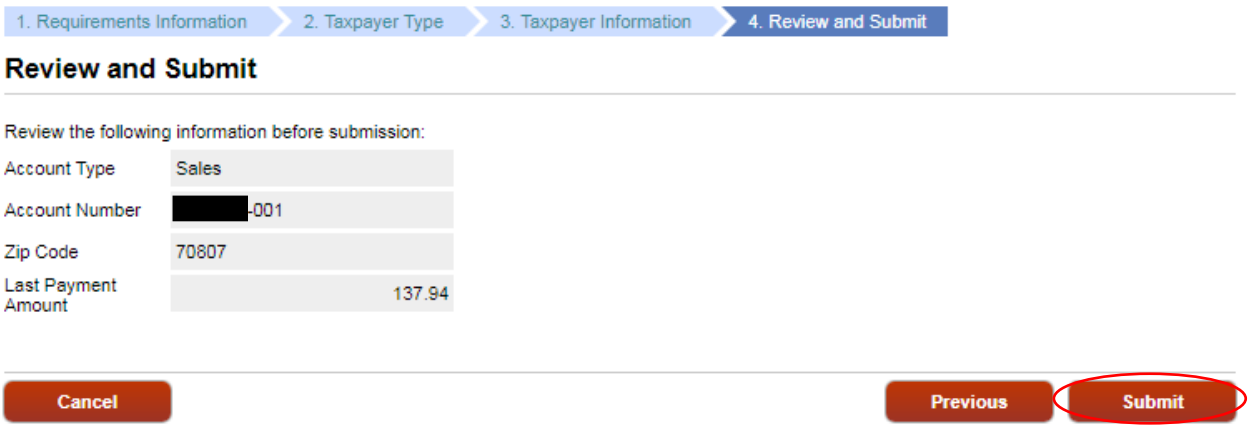
3. Taxpayer Information

- 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.

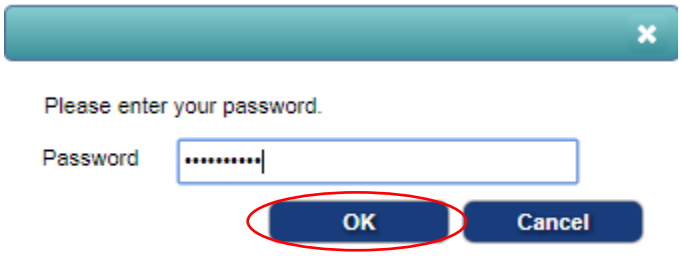


4. Review and Submit

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**.



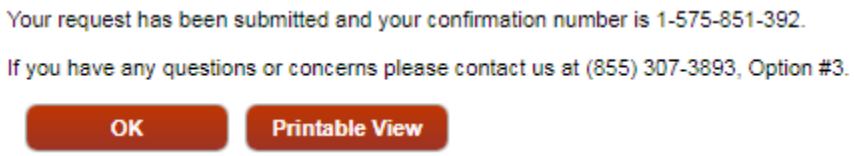
A window is displayed requesting your password as confirmation that you wish to submit the request. Complete the **Password** field and click **OK**.



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.



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]
[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.

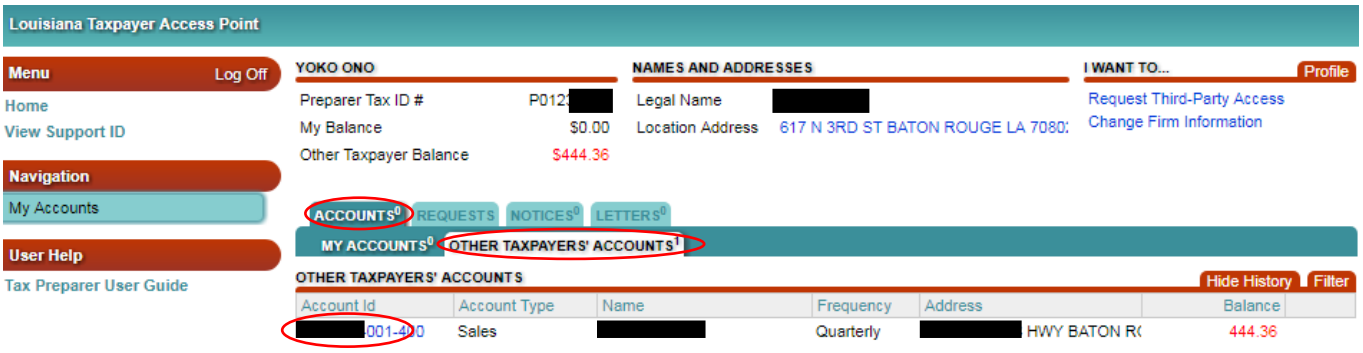
You may contact LDR at 855-307-3893 with any questions.

Respectfully,
Louisiana Department of Revenue

Not Printed

Access Client Business Accounts

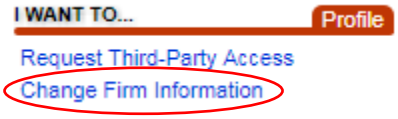
You instantly receive access to your clients' business accounts. To access an account, view the **Accounts** tab, and then click the **Other Taxpayers' Accounts** sub-tab. Click the corresponding account ID hyperlink to view the account.



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.

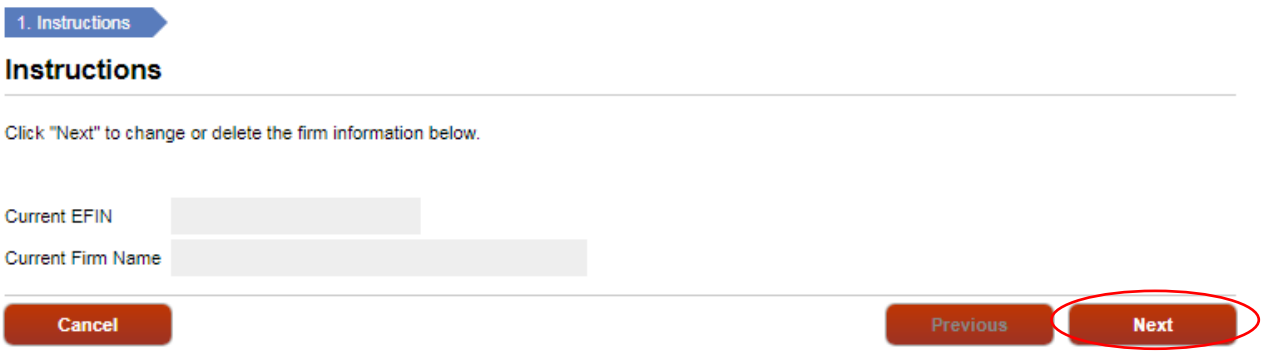
Add Firm Information

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



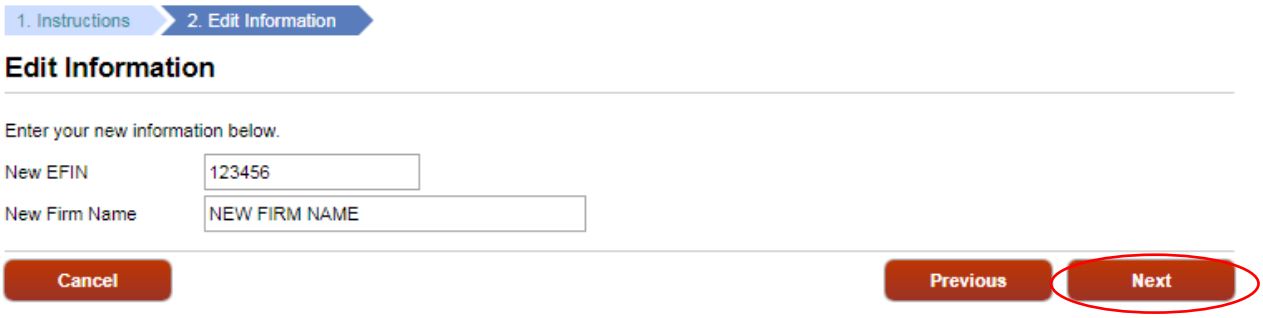
1. Instructions

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



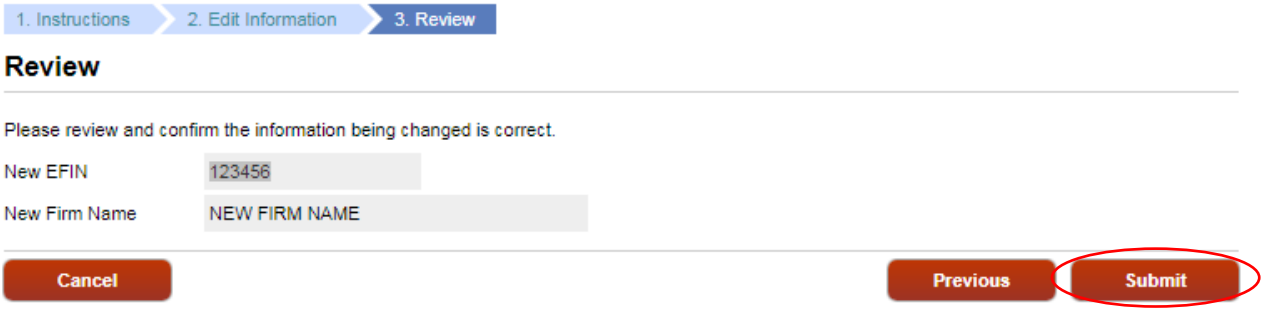
2. Edit Information

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

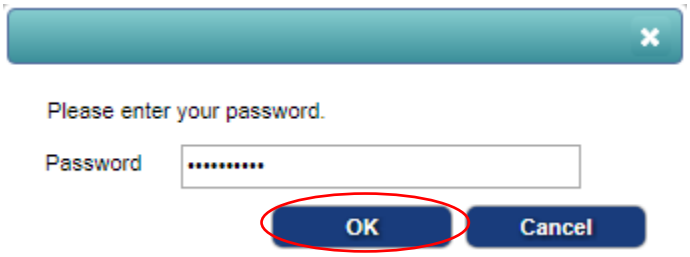


3. Review

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



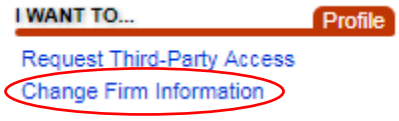
A confirmation window is displayed requesting your password as confirmation that you wish to add the information. Complete the **Password** field and click **OK**.



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

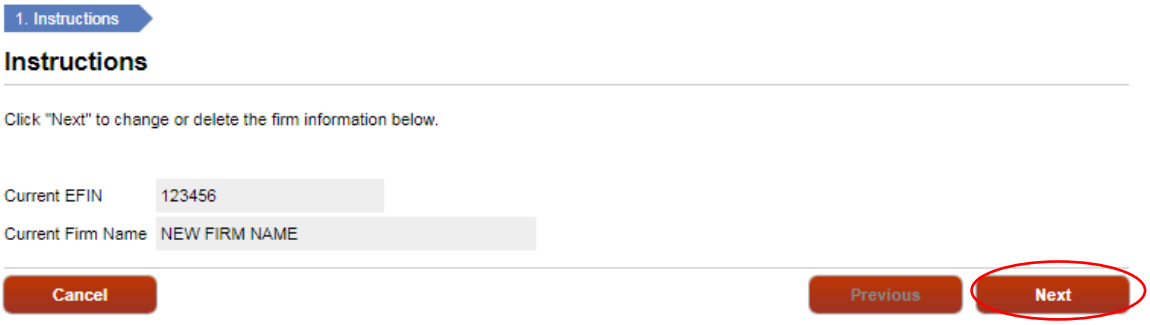
Edit Firm Information

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



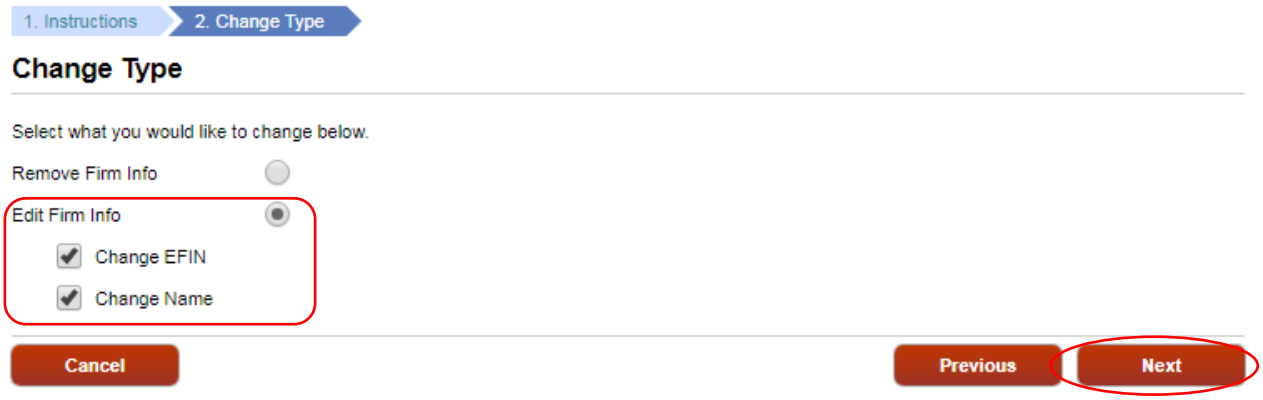
1. Instructions

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



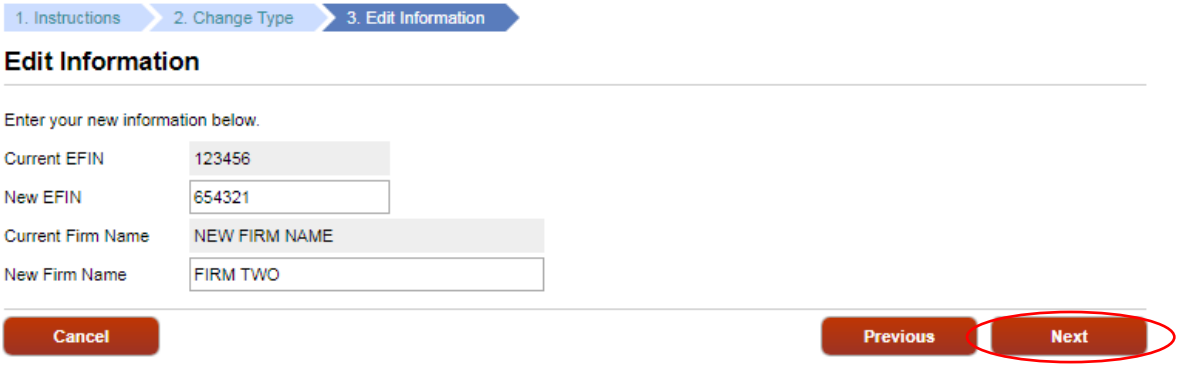
2. Change Type

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.



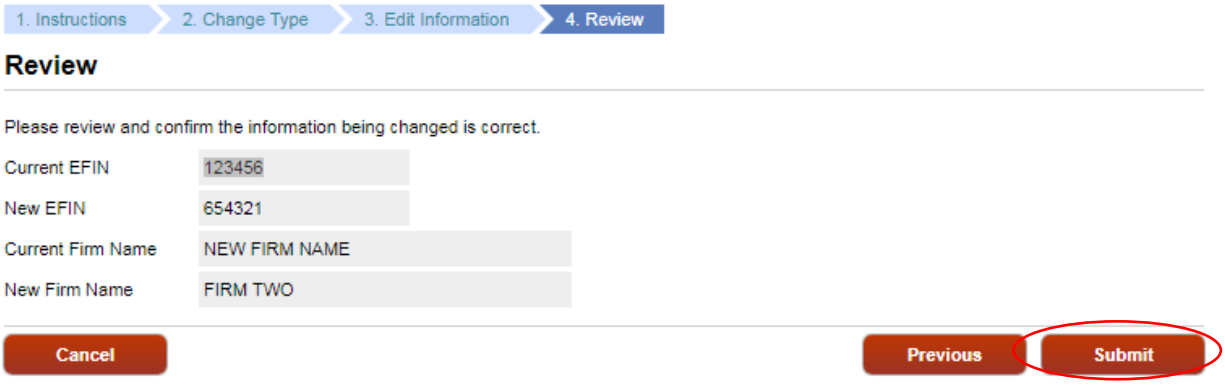
3. Edit Information

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

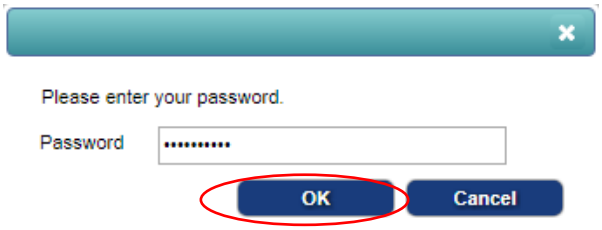


4. Review

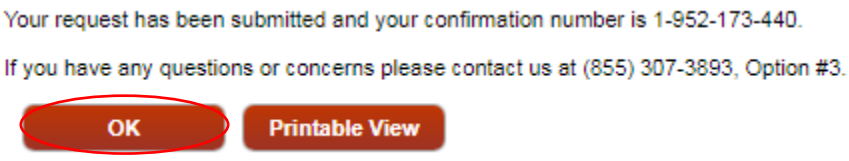
Review the page and confirm that the information entered is correct. Click **Submit.**



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

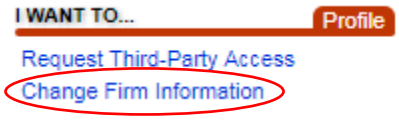


A confirmation page is displayed. Click **OK** to return to the main navigation page.



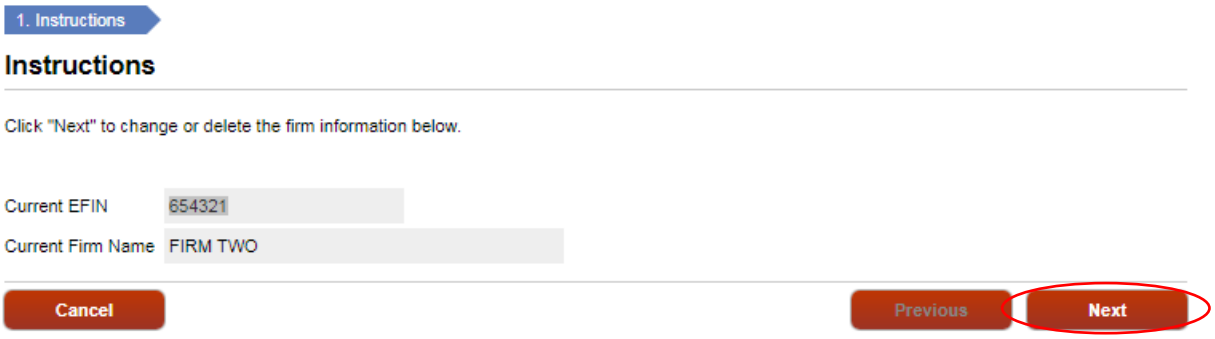
Remove Firm Information

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



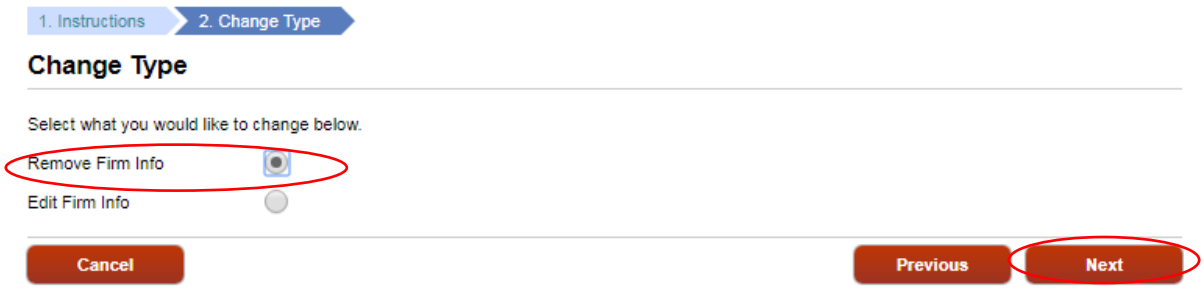
1. Instructions

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



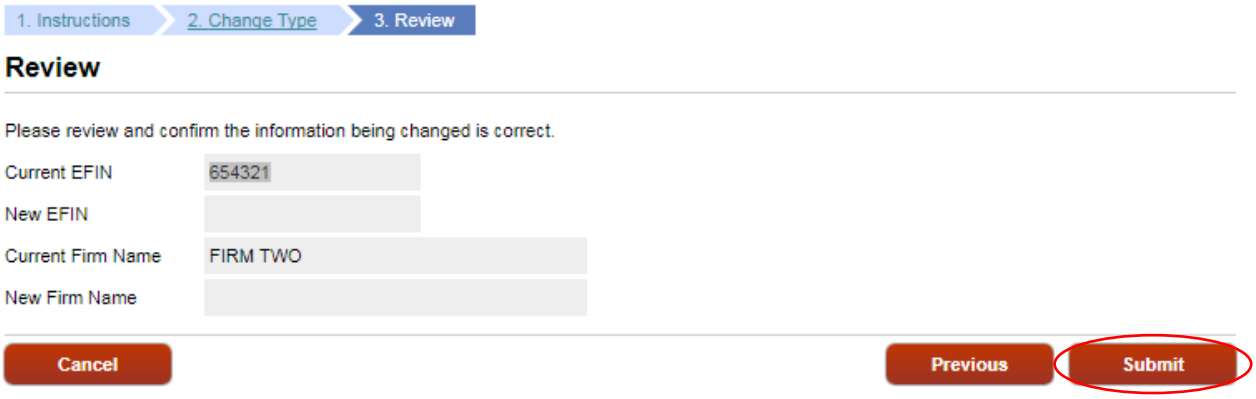
2. Change Type

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

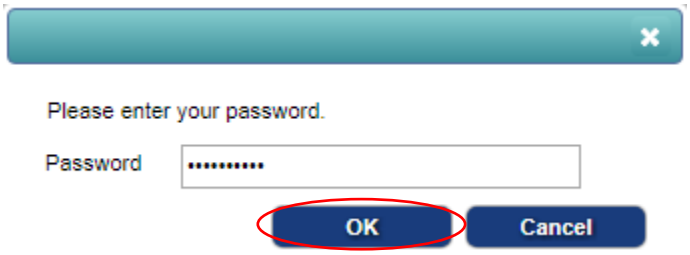


3. Review

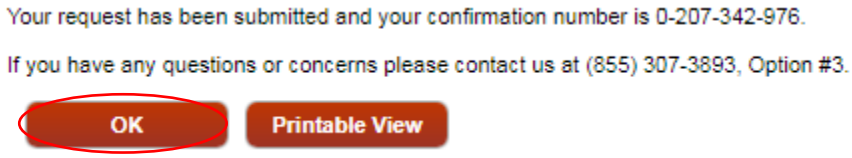
Review the page and confirm that the information being removed is correct. Click **Submit**.



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



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

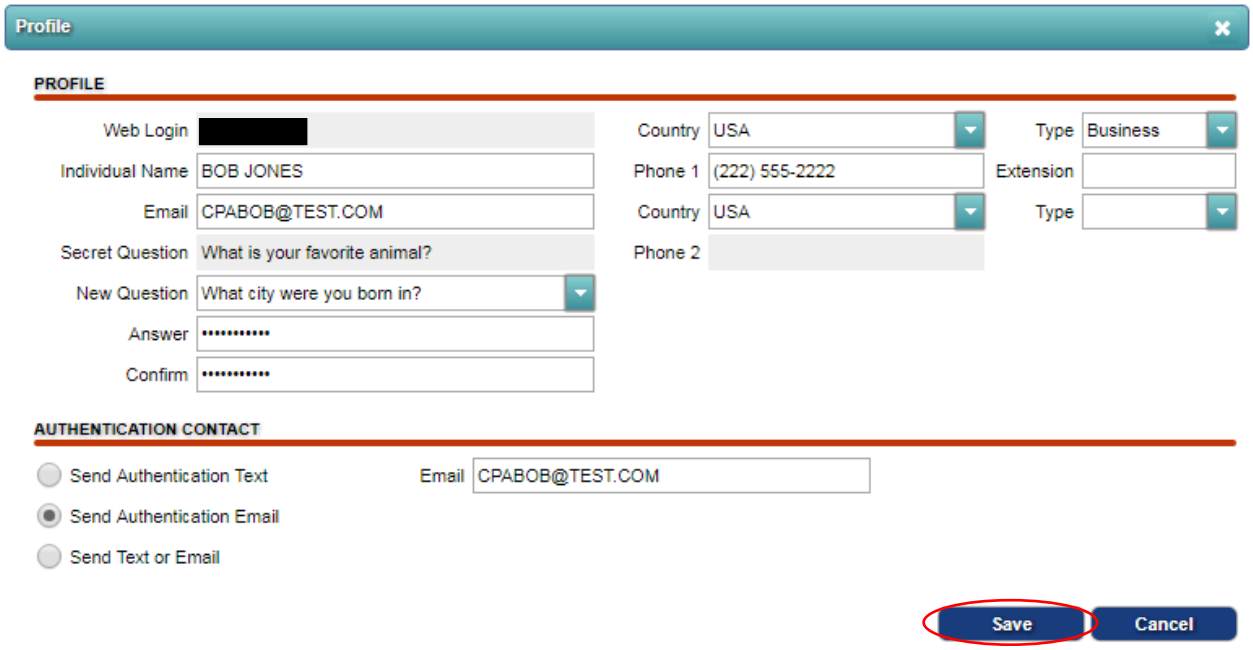


Update Profile

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

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

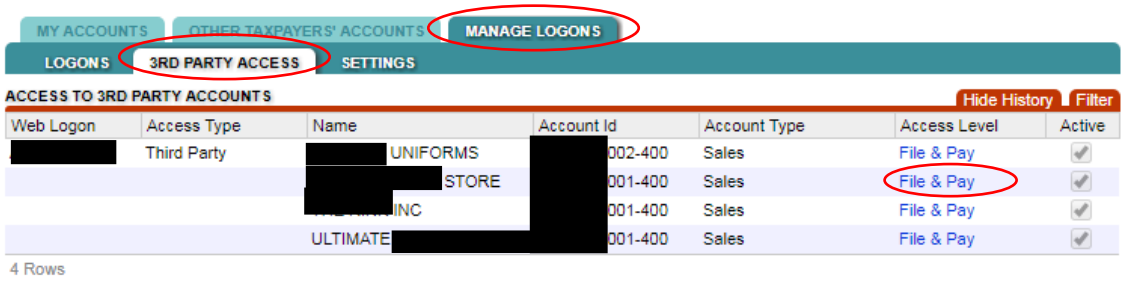
The Profile window is displayed. You may edit any of the information that is not grayed out. Click **Save.**



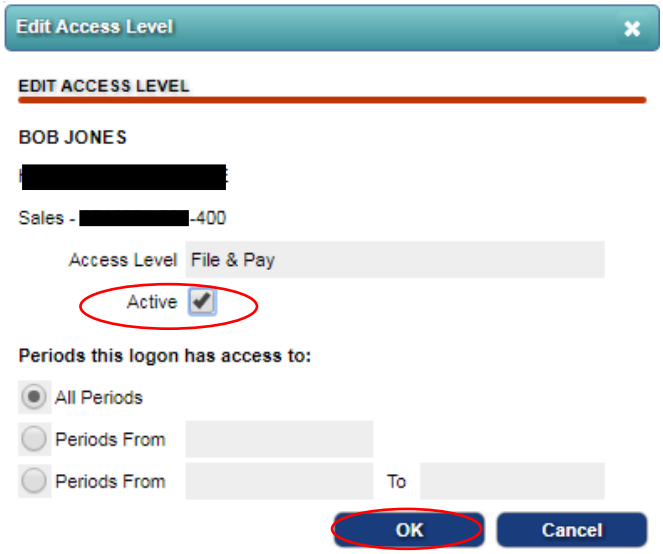
Manage Third-Party Access

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

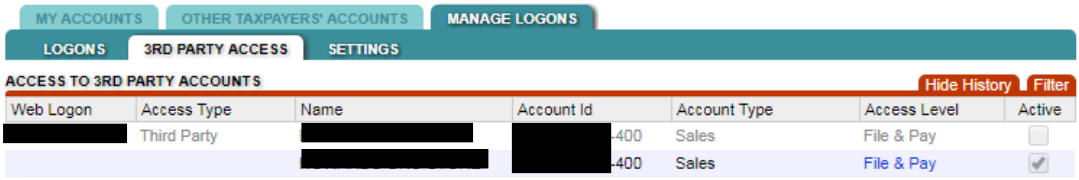
The Profile tab is displayed. View the **Manage Logons** tab, and then click the **3rd Party Access** sub-tab. Select the access level hyperlink of the desired account to manage your access.



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



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



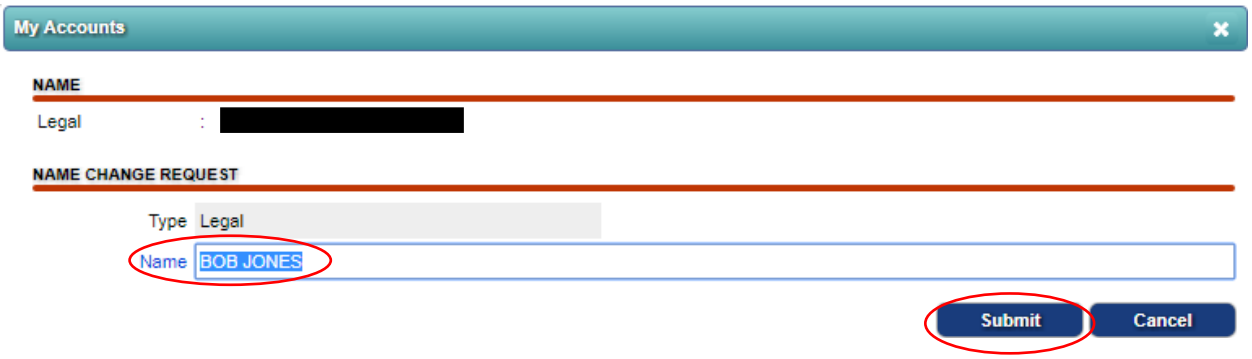
Update Names and Addresses

1. Legal Name

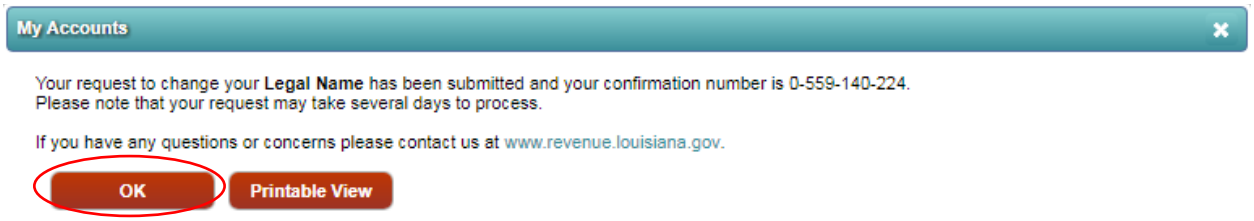
Click the hyperlink of your legal name in the Names and Addresses list on the Profile navigation window.

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

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



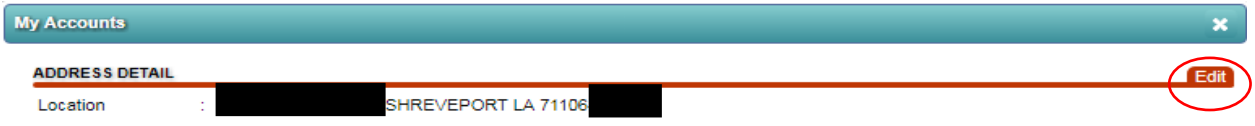
A confirmation window is displayed. Click **OK** return to the Profile navigation window.



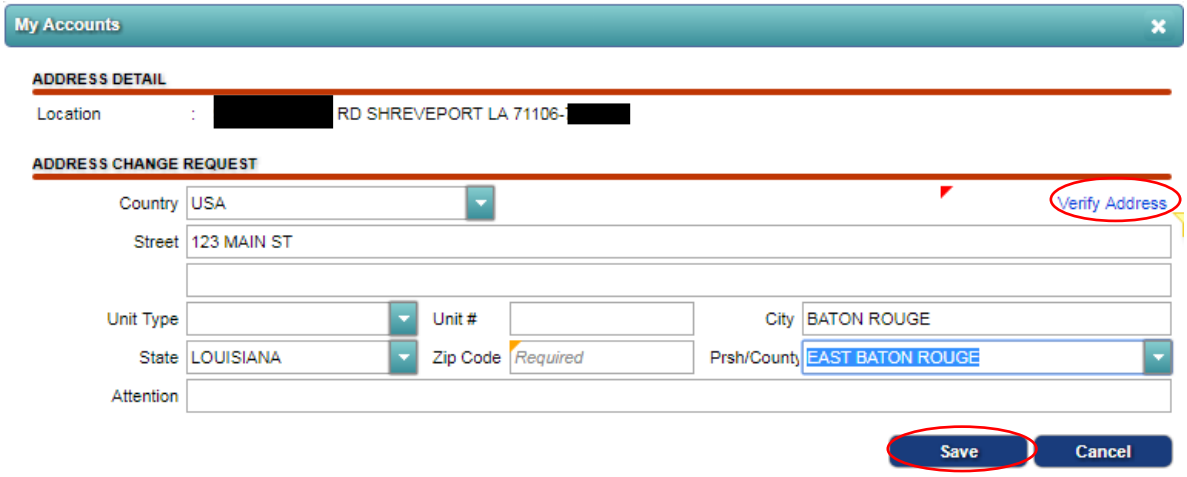
2. Addresses

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

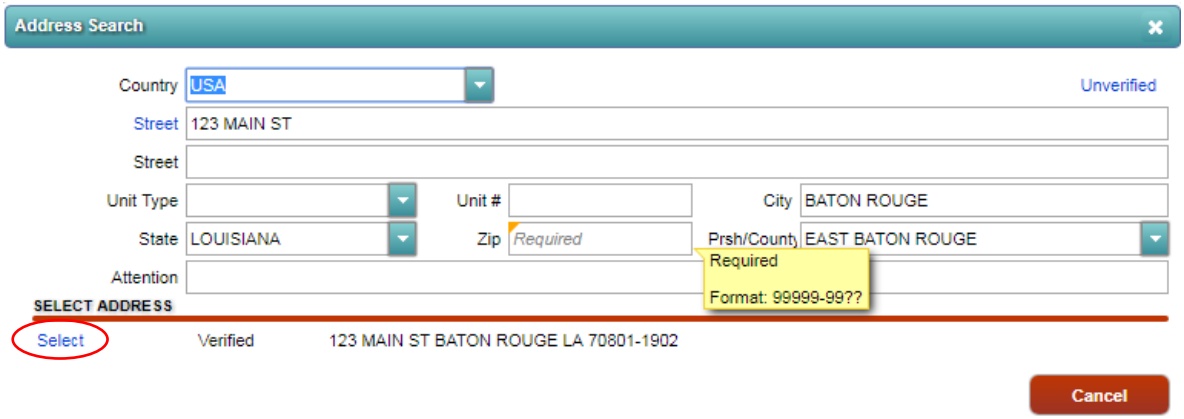
The My Accounts window is displayed. View the **Edit** tab in the top right-hand corner.



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



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



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.

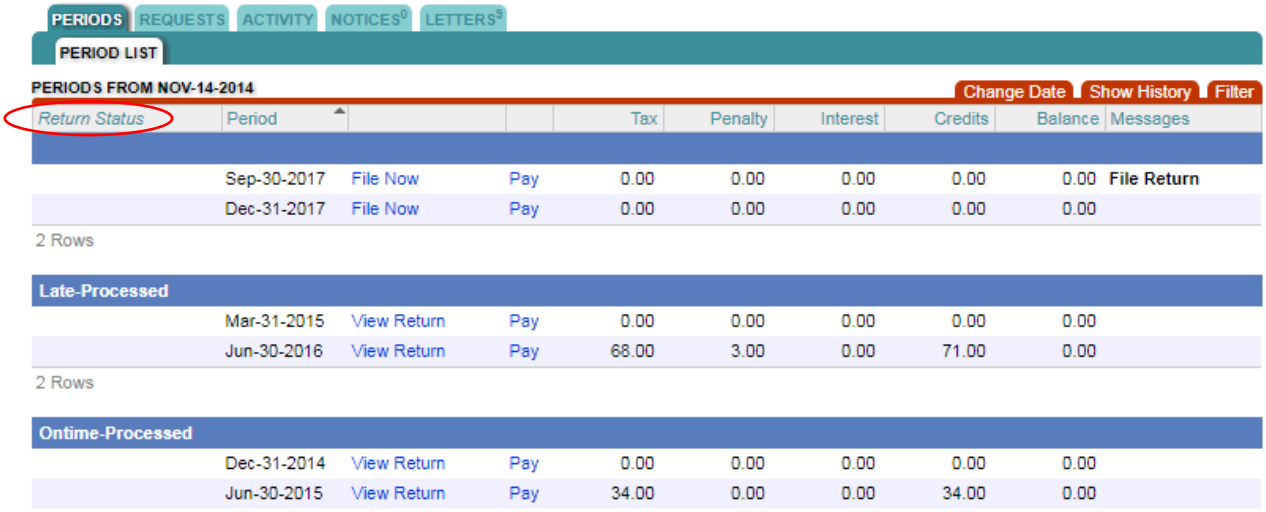
PERIODS | REQUESTS | ACTIVITY | NOTICES[0] | LETTERS[9]

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 | NOTICES[0] | LETTERS[9]

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									
Late-Processed									
	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									
Ontime-Processed									
	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*.