Step by Step- Guide to Sign Up for TAXcess

Using TAXcess is simple. Follow these easy steps. The time you save on paperwork can be spent directly on your business.

Before you get started you will need the following:

- Legal or "operating as" name of business and business structure
- Recent tax returns for each tax account, specifically:
    - account number
    - account type
    - last payment amount.
- Contact information you wish to supply to Manitoba Finance – Taxation Division.

STEP 1

Sign Up for TAXcess

- Ensure you have a copy of your most recently filed tax return for each tax account you would like to access online.
- Visit manitoba.ca/TAXcess and click *Sign Up Now for TAXcess.*
    - Note: You must complete all required fields.
- Create your own unique "sign in" user identification and password.
    - Note: Password must be 7 to15 characters long and include UPPER CASE letters, lower case letters, numbers and symbols.
- Confirm your identity by providing an existing account number and account type from your most recently filed tax return. You will also need to provide your business legal or "operating as" name and business structure.
- Establish your contact information. Enter the e-mail address where Manitoba Finance – Taxation Division will be able to send you e-mail notices for transaction confirmation. The phone number you provide should be one where Manitoba Finance – Taxation Division can contact you during regular business hours.
- Select your secret question and answer.
- Click NEXT.
- From your most recently filed tax return, confirm your account type and account number. Enter your postal code and the amount paid last period.
- Click NEXT.
- From your most recently filed tax return for the account number you have entered, complete the required field. If you have not filed any tax returns for this account, indicate that here.
- Click NEXT.
- Confirm the information on this screen. Click SUBMIT to submit the request.
- A confirmation number is issued to confirm the online sign up. You will receive an e-mail confirmation with instructions for signing in. An authorization code will then be generated. Keep this for your records. The authorization code is only required the

first time you sign in to TAXcess. For your records, print the information you provided to sign up for TAXcess by clicking PRINT.

- Click OK.
- If you add access to your RST and/or HE account(s), you will not receive paper returns. For each filing period, you will receive an e-mail in advance of the due date advising that you have an important notice received to your TAXcess account. The notice will indicate that your tax return(s) are due and should be filed on TAXcess. If you prefer to receive a paper return, you can update your preference once you have signed into TAXcess. Please note if your option is to receive a paper return it may take a full filing period before you receive the paper copy.

Note: You can begin signing up for TAXcess and then save and finish it later. To save a sign up process, click SAVE AND FINISH LATER during the sign up. You must provide your email address and confirm your email address. Click OK to save your sign up and finish later. You will be provided with a confirmation code. To complete a stored sign up process, click *Find Saved Request*. Enter your email address and confirmation code and Click SEARCH. To continue with your sign up process click CHANGE.

STEP 2

Add Tax Accounts and
Change your Online Profile, E-mail Address and Return Reminder Preference

- If you are signed out of TAXcess, sign in again by entering the user Id and password you created in Step 1. Click LOGON.
- To add additional online accessible accounts, click *Add Access to an Existing Account.*
- From your most recently filed tax return for this new account, enter the account type, account number, postal code and the amount paid last period.
- Click NEXT.
- From your most recently filed tax return for the account number you have entered, complete the required field. If you have not filed any tax returns for this account, indicate that here.
- Click NEXT.
- Confirm the information on this screen. Click SUBMIT to submit the request.
- A confirmation number is issued to confirm your request. For your records, print the information you provided to add an online account by clicking PRINT. Click OK.
- Repeat these steps to add additional accounts.
- To view your online profile, *click My Profile*. To change any details for your online profile, click *Change Profile*.
- To change your password, click *My Profile* and then click CHANGE PASSWORD.
- To change your e-mail address, click *My Profile* and then click *Change Profile*.
- To view your return reminder preference and e-mail a*ddress,* click *My Options*. To change your return reminder preference, click *Yes/No* to change.

STEP 3

Add Pre-Authorized Payment (PAD) Payment Sources to your Online Account

- If you are signed out of TAXcess, sign in again by entering the user Id and password you created in Step 1. Click LOGON.
- To add a Pre-Authorized Payment (PAD) payment source(s) to your account, click *Add PAD Payment Source.*
- Enter the name of the financial institution from which you would like to make your payments. A unique name must be assigned to each payment account if you are setting up multiple accounts at the same financial institution (i.e. Bank1 and Bank2)
- Enter the bank account type, bank and branch number, account number and confirm account number.
- Click NEXT.
- Review and verify the information on the Pre-Authorized Payment Agreement Form. Read the terms and conditions of the Pre-Authorized Payment Agreement by clicking on one of the *Terms and Conditions* links on the screen Once you have read and agreed to the terms and conditions of the Agreement, check the box and enter your answer to the secret question you chose during sign up in Step 1. Click I AGREE.
- If you do not agree to the terms and conditions of the Agreement, click I DO NOT AGREE.

  Note: Clicking PREVIOUS will allow you to make a change but will not allow payments to be made online.
- You have successfully added a PAD payment source. It is listed in the Payment Sources section of *My Profile*. You can also view and print the Pre-Authorized Payment Agreement.
- You can repeat these steps to add more PAD payment sources. You can also add a PAD payment source under *My Profile* by clicking on *Add New Payment Source*.
- To delete a PAD payment source, click the selected payment source and click DELETE FINANCIAL INSTITUTION ACCOUNT. If you are sure you want to delete your PAD payment source, click CONFIRM.
- Click HOME to return to the taxpayer summary page.

STEP 4

File Retail Sales and/or Health and Education Tax Returns

- If you are signed out of TAXcess, sign in again by entering the user Id and password you created in Step 1. Click LOGON.
- Click on the retail sales or health and education tax account number in the My Accounts section.
- Click *File Now* for the period to be filed.
- Provide the information for the required fields. Click NEXT.
- Confirm the information on this screen. Click NEXT. Click SUBMIT to file your return. Click OK.
- A confirmation number is issued to confirm the transaction. Print your return by clicking PRINT.
- If payment is required click PROCEED TO PAYMENT to make a PAD payment on the tax account or click OK to return to the account summary page.

STEP 5

Make Payments to Retail Sales, Health and Education, Corporation Capital, Fuel and/or International Fuel Tax Agreement (IFTA) Tax Accounts

- If you are signed out of TAXcess, sign in again by entering the user Id and password you created in Step 1. Click LOGON.
- Click the tax account number requiring a payment in the My Accounts section.
- Click *Pay* for the period to be paid.
- For an account payment (i.e. payment of arrears or balance outstanding), change the payment type to account payment, enter the payment amount and date, select your PAD payment source and verify all information. Click NEXT. Enter your secret answer and click I AGREE.
- For a return or corporation capital tax instalment payment, click on the applicable period, enter the payment amount and date, select your PAD payment source and verify all information. Click NEXT.
- Enter your answer to the secret question you chose during sign up in Step 1. Click I AGREE to submit the PAD payment.
- A confirmation number is issued to confirm the transaction. Print your payment request by clicking PRINT. Click OK to complete.
- Please note that you can also make a retail sales, health and education and/or IFTA tax account payment through your financial institution's online bill payment process. Contact your financial institution for more information.