



# City of Boulder Finance

## PROCESS FOR CREATING A THIRD PARTY TAX PREPARER APPLICATION AND WEB LOGON

1. On or after February 10, 2020, go to <https://boulderonlinetax.gentaxcpc.net/TAP/> and click on “Complete A Tax Preparer Application”.

🔍 Search our online services



### Registration

Register with the city as a new business or a tax preparer. Established businesses can create a web logon to file, pay, and manages taxes.

- > [Complete Business License Application](#)
- > [Complete a Tax Preparer Application](#)
- > [Continue Your Application](#)
- > [Create a Web Logon](#)



### Returns

While most returns require one to have an established logon to file and pay their tax liabilities, some returns can be filed below.

- > [File a Special Event Return](#)
- > [File a Consumer Use Tax Return](#)
- > [File a Construction Use Tax Reconciliation](#)



### Helpful Resources

Here are some links to some useful external resources, including the tax filing portal for the State of Colorado.

- > [Colorado Department of Revenue](#)
- > [Colorado Revenue Online](#)



### Learn More

Learn the intricacies of local tax laws and ordinances via the links below.

- > [Verify a Sales Tax License](#)



# City of Boulder Finance

2. Complete the Application process. The city will review and approve the application within two business days (but likely much faster).
3. After the application has been approved by the city, you will be able to login to your account on **Boulder Online Tax** and begin the process of getting connected to all of your clients in the system. Login to your Tax Preparer account and then click on the “More” link:

Boulder Online Tax System Staging - Not Production

**TAX PREPARER LLC**

20117900  
1136 ALPINE AVE  
BOULDER CO 80304-3405

Welcome, CURT OSBORNE  
*You last logged in on Wednesday, Jan 29, 2020 9:03:42 AM*  
[Manage My Profile](#)   
[Accountant Center](#)

[Summary](#) [Action Center](#) [Settings](#) [More...](#)

You don't have access to any accounts.



# City of Boulder Finance

4. Clicking on the “More” link will bring you to this primary dashboard page. Click on “Request Access to a Taxpayer” if you want to gain access to your clients’ accounts on **Boulder Online Tax**.

<p> <b>Submissions</b></p> <p>Search for previous submissions.</p> <p>&gt; <a href="#">Search Submissions</a></p>	<p> <b>Messages</b></p> <p>View messages I've received from the agency.</p> <p>&gt; <a href="#">Send a Message to the City</a></p> <p>&gt; <a href="#">View Messages</a></p>	<p> <b>Business License</b></p> <p>Manage business licenses.</p> <p>&gt; <a href="#">View Business Licenses</a></p>
<p> <b>Payments &amp; Returns</b></p> <p>Manage payments and returns for accounts of this customer.</p> <p>&gt; <a href="#">Make a Credit Card Payment</a></p> <p>&gt; <a href="#">Manage Payments &amp; Returns</a></p>	<p> <b>Names &amp; Addresses</b></p> <p>View or update names and addresses associated to this customer.</p> <p>&gt; <a href="#">Manage Names &amp; Addresses</a></p>	<p> <b>Manage Locations</b></p> <p>Manage business locations for this customer.</p> <p>&gt; <a href="#">Add/Change a Location</a></p> <p>&gt; <a href="#">Cease a Location</a></p>
<p> <b>Refunds &amp; Protests</b></p> <p>Request a refund or file a protest.</p> <p>&gt; <a href="#">Request a Refund</a></p> <p>&gt; <a href="#">File a Protest</a></p>	<p> <b>Letters</b></p> <p>View letters I've received from the agency.</p> <p>&gt; <a href="#">View Letters</a></p>	<p> <b>Access</b></p> <p>Manage access of accounts I have access to.</p> <p>&gt; <a href="#">View Access</a></p> <p>&gt; <a href="#">Manage Access</a></p> <p>&gt; <a href="#">Request Access to a Taxpayer</a></p>



# City of Boulder Finance

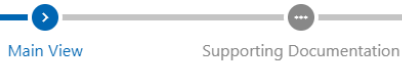
- You will need your client's FEIN or SSN and their Business Legal Name in order to request access to their accounts and to link their account with your Tax Preparer account.

## Taxpayer Access Request

TAX PREPARER LLC  
20117900

Staging NOT PRODUCTION

### Taxpayer Access Request



Please select "Add a Taxpayer" below, then fill out the information for the taxpayers you want access to.

[Taxpayer List](#) [Taxpayer:](#)

### Taxpayer:

[Add a Taxpayer](#) [Copy Record](#) [Delete this Taxpayer](#)

#### Taxpayer Information

Please provide information about the taxpayers in which you wish to file for.

ID Type \*  
*Required*

Taxpayer ID

Business Legal Name \*  
*Required*

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



# City of Boulder Finance

- After linking up all of your clients' accounts, you can click on "Manage My Profile" then on the "More" link within the Profile page, then click on the "Manage Secondary Logons" in order to assign access to client accounts to members of your compliance and tax preparation staff.

## TAX PREPARER LLC

20117900  
1136 ALPINE AVE  
BOULDER CO 80304-3405

Welcome, CURT OSBORNE

You last logged in on Wednesday, Jan 29, 2020 9:03:42 AM

[Manage My Profile](#)

Summary Action Center <sup>1</sup> Settings [More...](#)

What are you looking for?

### Submissions

Search for previous submissions.

[Search Submissions](#)

### Messages

View messages I've received from the agency.

[Send a Message to the City](#)  
[View Messages](#)

### Business License

Manage business licenses.

[View Business Licenses](#)

### Payments & Returns

Manage payments and returns for accounts of this customer.

[Make a Credit Card Payment](#)  
[Manage Payments & Returns](#)

### Names & Addresses

View or update names and addresses associated to this customer.

[Manage Names & Addresses](#)

### Manage Locations

Manage business locations for this customer.

[Add/Change a Location](#)  
[Cease a Location](#)

### Refunds & Protests

### Letters

### Access



# City of Boulder Finance

< TAX PREPARER LLC

[Profile](#)

Action Center <sup>1</sup>

[More...](#)

## Profile

Name

CURT OSBORNE

[Update Name](#)

My Email

osbornec@bouldercolorado.gov

[Change Email](#)

My Phone Number

No phone number

[Edit Phone Number](#)

## Security

Password

Last changed January 29

[Change Password](#)

Secret Question

What is your father's middle name?

[Update Your Secret Question](#)

Two-Step Verification Settings

Two-step verification is disabled

[Change Two-Step Settings](#)



# City of Boulder Finance

Profile

Action Center 1

More...

What are you looking for?

## Access

Manage access of accounts I have access to.

- > [Manage Your Access](#)
- > [Manage Third Party Access](#)

## My Users

Manage users who work for me.

- > [Manage Secondary Logons](#)

## Other Users

Manage users who are associated to me.

- > [Manage Additional Logons](#)

## Payment Channels

Manage my bank accounts used to make payments on e-Services.

- > [Manage Payment Channels](#)

## Submissions

Search for previous submissions.

- > [Search Submissions](#)

## Messages

View messages I've received from the agency.

- > [Send a Message to the City](#)
- > [View Messages](#)

## Activity

View my activity on e-Services.

- > [View Activity](#)



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Boulder Online Tax System



< My Profile

## Secondary Logons

You can create and manage logons that only have access to customers and accounts that you have access to. These logons will act on your behalf to perform tasks such as filing returns and making payments for your business or clients.

[Secondary Logons](#) [Customer Security](#) [Security Groups](#)

### Logons

Add

Filter

Logon	Name	Email	Access Type
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There are no logons.