Ohio.gov

Business

Ohio Business Gateway
Help/FAQs

Utilizing Service Provider Accounts for Client Management

Establishing a **Service Provider-Client Relationship** is the Ohio Business Gateway's built-in functionality to allow CPA and third party Service Providers to prepare and submit transactions on behalf of businesses.

A **Service Provider** is an individual or business that provides filing or transaction services for a Client (a separate business) via the Gateway. Examples of Service Providers include CPAs and attorneys.

Clients include all individuals or businesses that benefit from the services provided by Service Providers.

Benefits to establishing a Service Provider-Client Relationship, include:

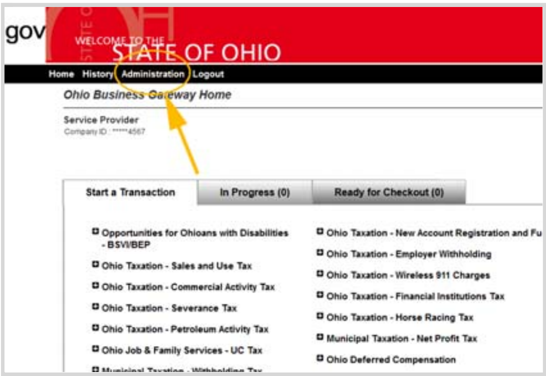
- Service Providers can securely link to an unlimited number of Client businesses to efficiently support transactions under a single username and password
- Separate accounts enable Service Providers and Clients to access the Gateway individually
- Client-designated access levels and filing permissions for linked Service Providers
- Traceability of filings to user-specific accounts

Establish your organization as a Service Provider

With a Service Provider ID, you can link to an unlimited number of Clients and support Gateway transactions on their behalf.

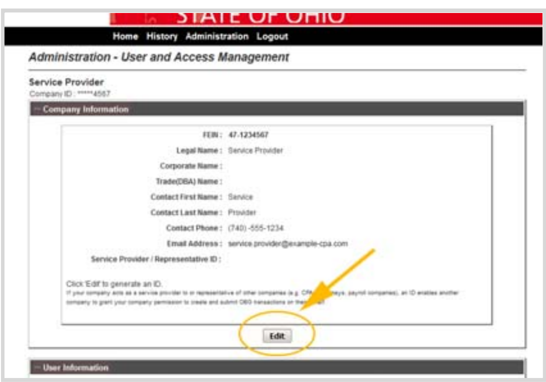
The section below outlines the process of establishing your organization as a Service Provider within the Gateway by creating a Service Provider ID.

Step 1: Navigate to Administration



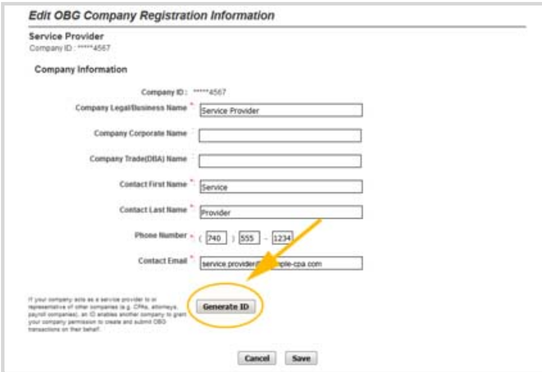
After logging into the Gateway, click on **Administration** in the main navigation.

Step 2: Edit company information



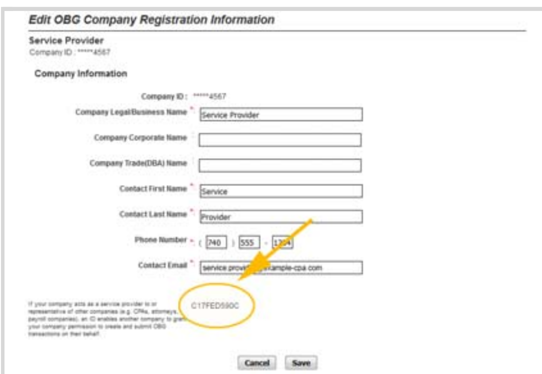
On the **Administration** page, click **Edit** at the bottom of the **Company Information** section.

Step 3: Generate Service Provider ID



On the **Edit Company Information** page, click **Generate ID**.

Step 4: Save generated Service Provider ID



Once the system generates your Service Provider ID, click on **Save**. Sharing your Service Provider ID with your Clients will enable them to grant your organization Service Provider access, allowing your organization to file Gateway transactions on their behalf.

Note: As confirmation of this step, you will receive an email with the subject line "Ohio Business Gateway Service Provider ID Generated." This email will contain your Service Provider ID.

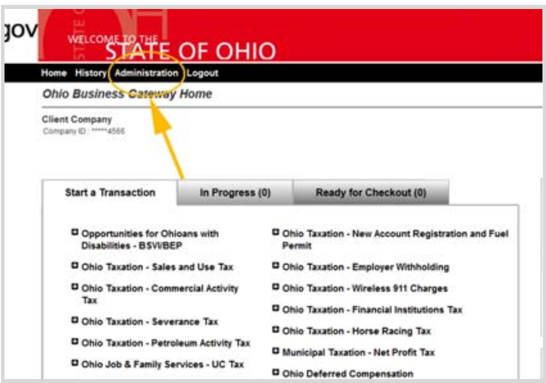
Involve your Client to obtain access to their account

As an established Service Provider, how do I gain access to my Clients' accounts? As a Client, how do I grant access to my Service Provider?

A Service Provider cannot access a Client account until the Client has granted the Service Provider access. The Client will need to know the Service Provider ID in order to grant the the Service Provider access.

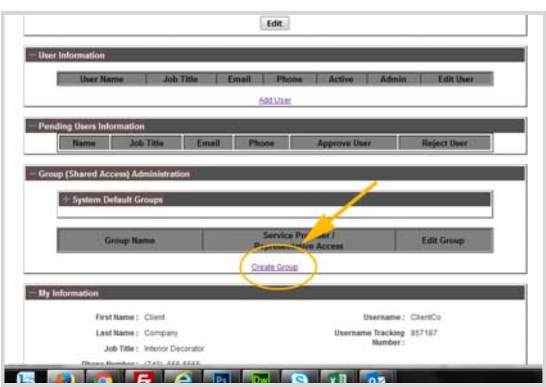
The steps outlined in this section show the process Clients must take in order to grant access to Service Providers.

Step 1: Navigate to Administration



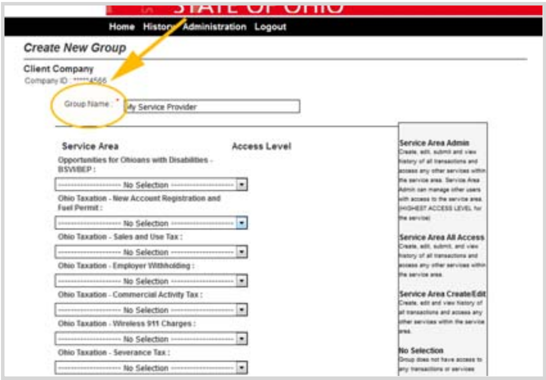
After logging into the Gateway, click on **Administration** in the main navigation.

Step 2: Create a group



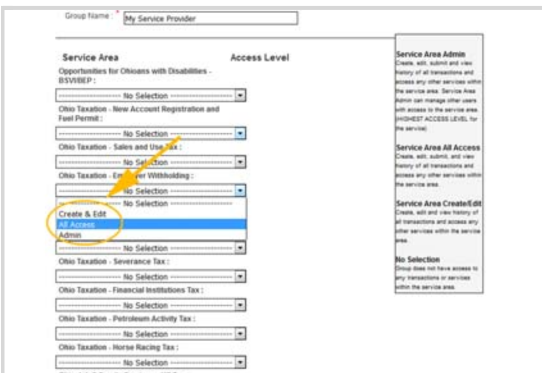
On the **Administration** page, click on **Create Group** at the bottom of the **Group (Shared Access) Administration** section. You will use this group to create the link between your account and the account of your Service Provider.

Step 3: Create group name



At the top of the **Create Group** page, enter a group name. This is the name that you will provide to your Service Provider.

Step 4: Assign access levels for group



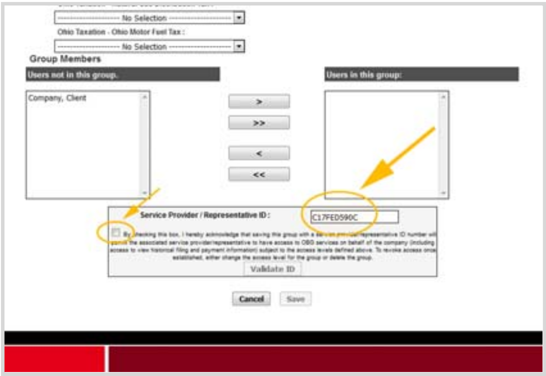
Scroll down and set this group's **access level** for each Service Area.

Access levels:

- **Create & Edit** enables all users within a group to create and edit filings, but not submit these filings or payments.
- **All Access** enables all users within a group to create, edit, and submit filings and payments.
- **Admin** enables the same actions as All Access and adds the ability to create and manage users.
- **No Selection** indicates that no access has been granted.

Note: Selected access levels will apply to all members of a given group.

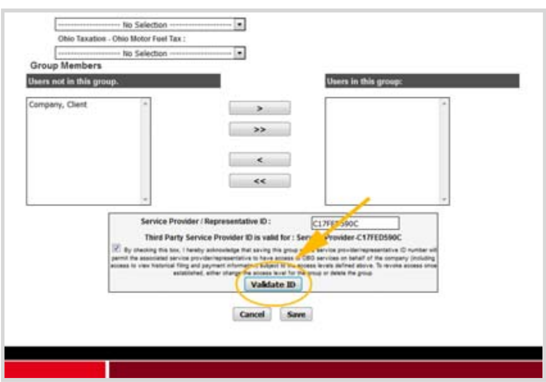
Step 5: Enter Service Provider ID



Scroll to the bottom of the page and enter the 10-digit alphanumeric **Service Provider/Representative ID** supplied by your Service Provider. Only after you enter the ID and check the acknowledgment box will the Validate ID button appear.

Step 6: Validate Service Provider ID

Click on **Validate ID**. A message should appear indicating the ID is valid for the Service Provider. Click **Save**. If the ID is not valid, reach out to your Service Provider to verify their ID.



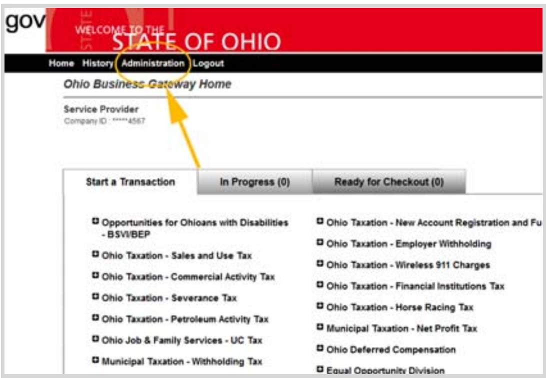
Following completion of this process, the Service Provider will receive an email with the subject-line "Access Granted to Ohio Business Gateway Account" confirming they have been granted access to your account. At the same time, you should receive a confirmation email with the subject-line "Ohio Business Gateway Account Access Granted to Service Provider."

Add users from your organization to a Client account

As a Service Provider Administrator, how do I grant access so individual users can perform Gatewa transactions for Client accounts?

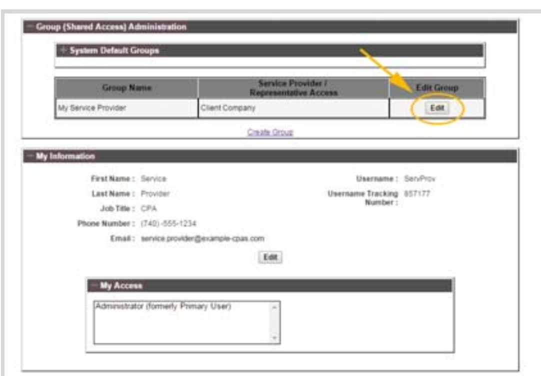
Once the Client has provided account access to the Service Provider, the Service Provider Administrator must grant access to individual users so these employees can file transactions on behalf of the Client.

Step 1: Navigate to Administration



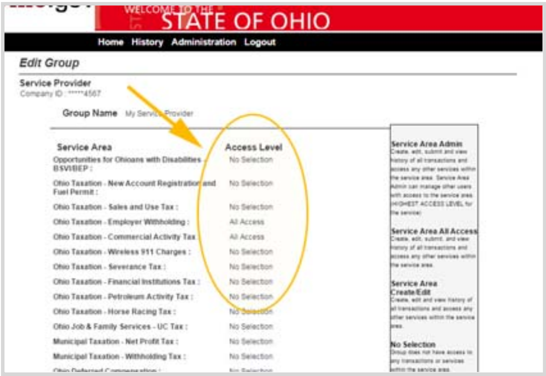
After logging into the Gateway, click on **Administration** in the main navigation.

Step 2: Edit group



On the **Administration** page, scroll down to the **Group (Shared Access) Administration** section. Look for the **Group Name** provided to you by your Client and click on **Edit** under **Edit Group**. If you do not see the expected group, reach out to your Client to verify that they've completed their part of the process.

Step 3: Review access levels



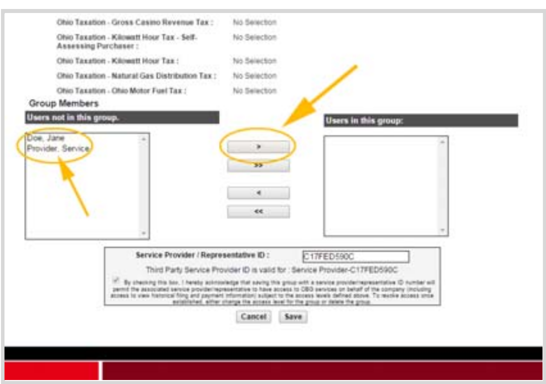
The top of the **Edit Group** page will show the access levels that your Client has granted to your organization for each Service Area.

Access levels:

- **Create & Edit** enables all users within a group to create and edit filings, but not submit these filings or payments.
- **All Access** allows all users within a group to create, edit, and submit filings and payments.
- **Admin** allows the same actions as All Access and adds the ability to create and manage users.
- **No Selection** indicates that no access has been granted.

Note: Selected access levels will apply to all members of a given group.

Step 4: Add individual users to the Client group



Scroll down to the **Group Members** section of the page and add a user to the group by selecting a user and clicking on the single arrow button. All users added to the group will have the group's permissions to act on behalf of the Client.

Tip: click the single arrow button to add one user at a time or click the double arrow button to add all users.

Step 5: Save new group members

Click **Save**.

Users who have been added to this group will now see a **Change Company** dropdown on the right-hand side of their Gateway home page which will allow them to easily switch between Clients and their own accounts.

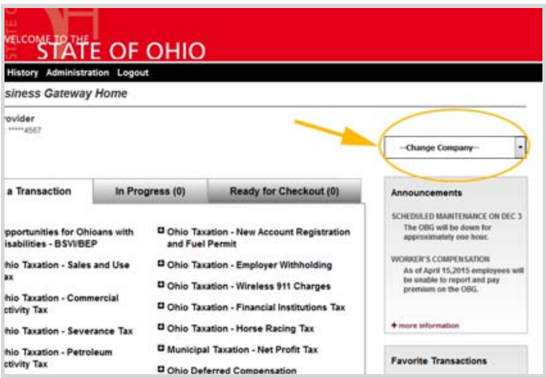
Note: if is the first time you have ever completed the Service Provider-Client Relationship process, you and your assigned users will need to log out and log back in to see the **Change Company** dropdown.

<u>**Easily switch between Clients to file on their behalf**</u>

As a Service Provider, how do I use my Service Provider ID to switch between Clients and file on their behalf?

Establishing your organization with a Service Provider ID and linking to your Clients' accounts allows you to centrally manage each of your Clients' accounts, all within your Service Provider account.

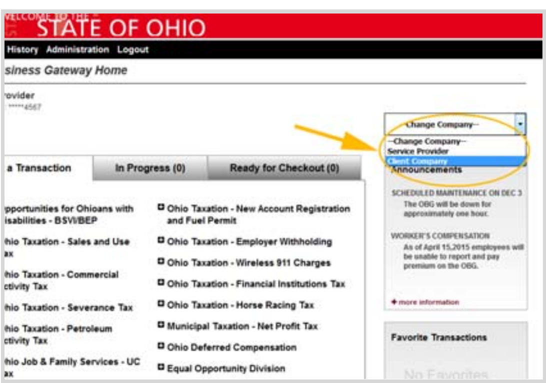
Step 1: Change Company



After logging into the Gateway, look for the **Change Company** dropdown in the upper right hand corner of the home page.

This list includes your Gateway account as well as the accounts of each client that has granted you Service Provider access.

Step 2: Select a Client from the dropdown

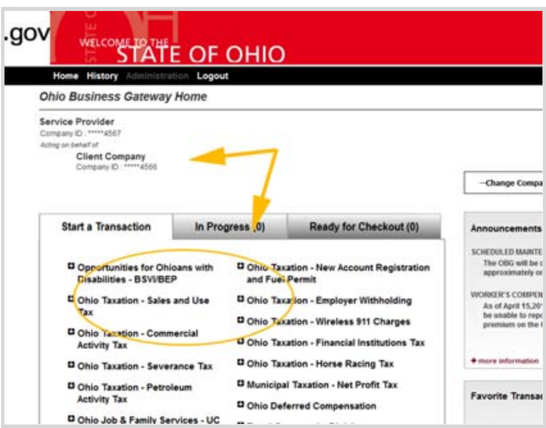


Select the name of the Client for which you would like to make a filing. You'll then be routed to that Client's Gateway home page.

Step 3: Validate the selected Client

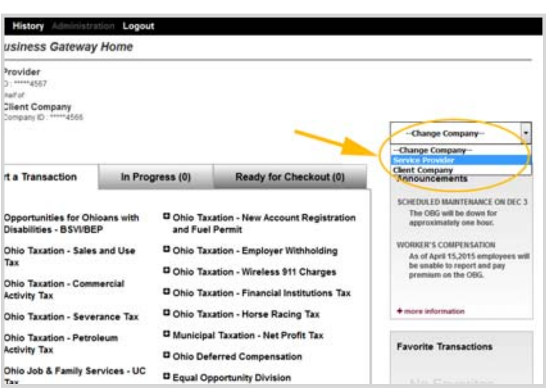
You can be certain that you are in the correct account by verifying the Client's information listed at the top of the page.

Step 4: Select a transaction and begin filing on behalf of the Client



After you have verified you are in the correct account, you can create a new filing by choosing a service from the **Start a Transaction** tab. If you have not been granted access to a given transaction, that transaction will be grayed out.

Step 5: Return to the home page to perform transactions for another client



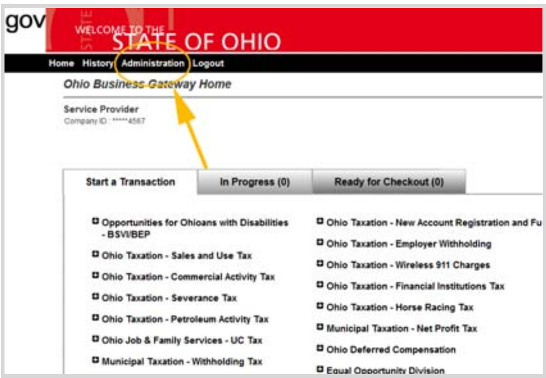
When you have finished filing for this Client, you can navigate back to your own account or switch to another Client's Gateway account via the Change Company dropdown.

Change/remove users assigned to a Client account

As a Service Provider Administrator, how do I change/remove users assigned to a Client account?

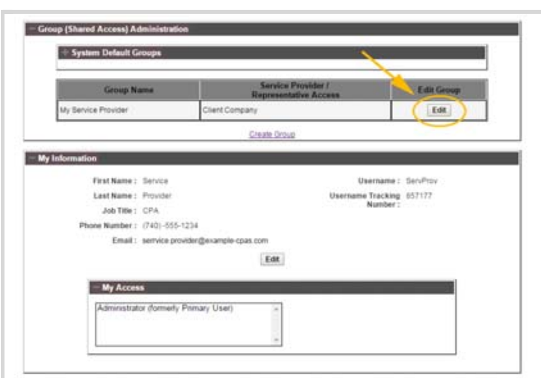
Service Provider Administrators have the ability to add and remove access of individual users for Client accounts.

Step 1: Navigate to Administration



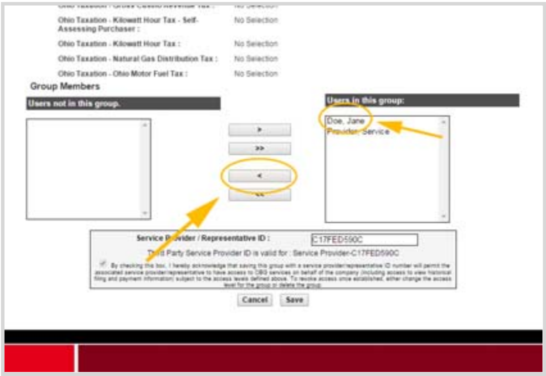
After logging into the Gateway, click on **Administration** in the main navigation.

Step 2: Edit group



On the **Administration** page, scroll down to the **Group (Shared Access) Administration** section. Look for the **Group Name** provided to you by your Client and click on **Edit** under **Edit Group**.

Step 3: Select users



Scroll down to the **Group Members** section of the page.

To add a user, select the user's name under **Users not in this group** and click on the single right arrow.

To remove a user, select the user's name under **Users in this group** and click on the single left arrow.

Tip: click the single arrows to add or remove one user at a time. Click the double arrows to add/remove all users.

Click **Save**.

Note: Any time a user is added or removed from a Client group, they will receive an email confirming the change.