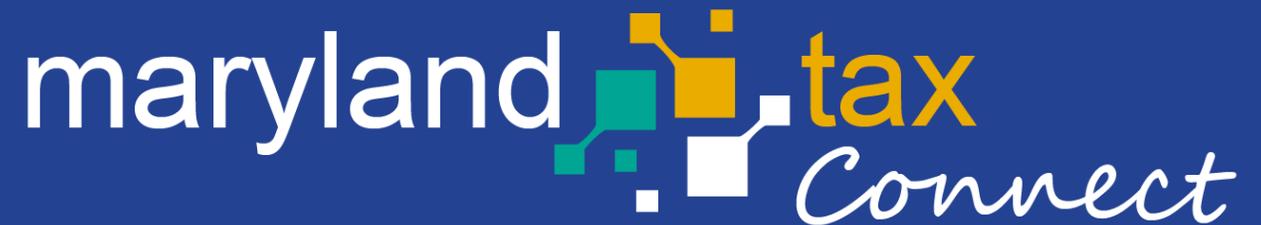


Maryland Tax Connect

Manage Authorized User Access For Bulk Filers Guide



Manage Authorized User For Bulk Filing

Note: Maryland Tax Connect Administrator Account is required to execute these steps.

This document contains instructions for the Tax Administrator to grant users access to the bulk upload function.

Bulk filing for a single business account: If you wish to bulk upload withholding reconciliation information for an authorized business, you should contact the businesses tax administrator to be granted access for the bulk upload function. If you are using this option, it is important that you ONLY upload information for the business you are authorized on.

Bulk Filing for multiple business accounts: If you are an authorized user but wish to bulk upload withholding reconciliation information for multiple businesses, you will need to register as a Transmitter User.

Refer to the **Transmitter User Guide** for step-by-step instructions on how to [register](#).



Administrator Profile Information

Login to your Administrator account to grant access to an Authorized User for bulk uploading. Once logged into your account. Select **Manage Authorized Users** from the **Profile Information** menu.

The screenshot shows the Maryland Tax Connect Administrator interface. The top navigation bar includes 'Home', 'Profile Information', 'Account Inquiry', 'Online Services', 'Transmitter Transactions', and 'Secure Message Center'. The 'Profile Information' menu is expanded, showing options: 'View Account Information', 'User Profile', 'Communication Preferences', 'My Profile', 'Add a Tax Account', and 'Manage Authorized Users'. The 'Manage Authorized Users' option is highlighted with a red box. The main content area displays a 'User Profile Summary' for Tom Jones, an 'Account Information' section for MTC LLC, and a table with columns for 'Balance' and 'Last Period Filed'.

Balance	Last Period Filed
\$0.00	
\$0.00	



Manage Authorized Users

From the **Manage Authorize Users** page, the Administrator will add or select the **User ID** of the person they granting Authorization to.

Profile Information / Manage Authorized Users

Manage Authorized Users ?

This page allows you, for each taxpayer for which you are the Authorized Administrator, to designate one or more individuals as Authorized Users for the purpose of viewing and/or modifying account information, and executing one or more account functions based on specific permissions you assign them. A Authorized user is someone other than an employee or officer of the taxpayer (for example, an accountant or attorney).

By adding a new Authorized User, you are certifying that you designate that individual as an authorized agent of the taxpayer and allow that individual to have access via this portal to confidential State of US tax information for the periods indicated; for the Tax Account[s] selected; and in order perform any Taxpayer Functions selected.

[Add New Authorized User](#)

Search:

User Name	User ID	Taxpayer Name	Effective Start Date	Effective End Date	Status
Jane Doe	Authorized123	MTC LLC	07/01/2024		Active

Showing 1 to 1 of 1 entries

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Add New User Authorization

To add a new Authorized User, the Administrator will enter the **User ID** and **Registration Confirmation Number**. Example: Bobdoe24/TU00000001742

Profile Information / Manage Authorized Users

New User Authorization ? * indicates required field

Add a new Authorized user.
Note: Authorized Users must already have a valid web portal account.

* User ID	<input type="text" value="bobdoe24"/>
* Registration Confirmation Number	<input type="text" value="TU00000001742"/>



User Details

Select from the list of available **Taxpayers** that you want to update access for. Then proceed to the **Account Authorization** options. **NOTE:** You should only upload files for these specific accounts.

Profile Information / Manage Authorized Users

User Details ? * indicates required field [View Profile History](#)

User Information

First Name Jane
Last Name Doe
User ID Authorized123
Last Logged On 01/13/2025 08:08 AM

Contact Information

Daytime Phone (410) 260-7000
Extension
Mobile Phone
Email portalttest@marylandtaxes.gov

Taxpayer Authorizations

Please select the checkboxes in the View column to assign the user read-only access to the selected taxpayers. Please select Taxpayer Functions and/or Account Authorizations to assign the user additional access to the selected taxpayers.

View <input checked="" type="checkbox"/>	Taxpayer Name	ID	* Start Date	End Date	Assignments ?
<input checked="" type="checkbox"/>	MTC LLC	FEIN: 00-123xxxx	07/01/2024 <input type="text"/>	MM/DD/YYYY <input type="text"/>	Authorize Manually: <input type="checkbox"/> Taxpayer Functions <input checked="" type="checkbox"/> Account Authorizations Or: <input type="button" value="Apply a Template"/>



Account Functions

On the **Account Functions** page, you can grant the **New User** full access by selecting the check box under **Assign** or select individual functions. You must check the **Upload Tax Documents in Bulk to upload W2/1099 information**.

Profile Information / Manage Authorized Users

Account Functions ?

* indicates required field

Check the checkboxes below to enable this user to perform the selected account functions on behalf of this Taxpayer:

User ID	Authorized123	Taxpayer Name	MTC LLC
User Name	Jane Doe	Account Type	WITHHOLDING
		Account ID	CRN: 35664868

Assign	Function
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	Change Address
<input checked="" type="checkbox"/>	File Returns
<input checked="" type="checkbox"/>	Make Payments
<input checked="" type="checkbox"/>	Update Account Email
<input checked="" type="checkbox"/>	Update Account Phone
<input checked="" type="checkbox"/>	Upload Tax Documents in Bulk
<input checked="" type="checkbox"/>	View Tax Type Specific Notices

Showing 1 to 7 of 7 entries

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Account Authorizations

Select the **Account Type (Withholding/Reconciliation)** and corresponding **Account Functions** you are granting **User** access to. Provide effective start and ends then proceed to next page. **Note:** *Providing an end date is optional.*

Profile Information / Manage Authorized Users

Account Authorizations ?

* indicates required field

Check the checkboxes below to enable this user to perform the selected account functions on behalf of this Taxpayer.

User ID	Authorized123	Taxpayer Name	MTC LLC
User Name	Jane Doe		
User Authorization Start Date	07/01/2024		
User Authorization End Date			

Assign	Account Type	Account ID	Account Information	Effective Dates	Assigned Function
<input checked="" type="checkbox"/>	WITHHOLDING / FILING	CRN: 35664868	MTC LLC 45 CALVERT ST ANNAPOLIS, MD 214011994 UNITED STATES	* Start: 01/01/2024 End: MM/DD/YYYY Add Date Range	Account Functions
<input checked="" type="checkbox"/>	WITHHOLDING / RECONCILIATION	CRN: 35664868	MTC LLC 45 CALVERT ST ANNAPOLIS, MD 214011994 UNITED STATES	* Start: 01/01/2024 End: MM/DD/YYYY Add Date Range	Account Functions

Showing 1 to 2 of 2 entries

Navigation: < 1 >



User Details

After you have designated the Authorized Users account functions you will be returned to the User Details page. Verify information then click **Save** to capture selections.

User Details ? * indicates required field [View Profile History](#)

User Information

First Name Jane
Last Name Doe
User ID Authorized123
Last Logged On 01/13/2025 08:08 AM

Contact Information

Daytime Phone (410) 260-7000
Extension
Mobile Phone
Email portaltest@marylandtaxes.gov

Taxpayer Authorizations

Please select the checkboxes in the View column to assign the user read-only access to the selected taxpayers. Please select Taxpayer Functions and/or Account Authorizations to assign the user additional access to the selected taxpayers.

View	Taxpayer Name	ID	* Start Date	End Date	Assignments
<input checked="" type="checkbox"/>	MTC LLC	FEIN: 00-123xxxx	07/01/2024	MM/DD/YYYY	Authorize Manually: <input type="button" value="Taxpayer Functions"/> <input type="button" value="Account Authorizations"/> Or: <input type="button" value="Apply a Template"/>

Showing 1 to 1 of 1 entries



Changes Saved Successfully

After you have successfully granted access to the **Authorized User** you will see a confirmation message. Both the **Administrator** and **Authorized User** will receive a confirmation email.

Your changes have been saved successfully.

Manage Authorized Users ?

This page allows you, for each taxpayer for which you are the Authorized Administrator, to designate one or more individuals as Authorized Users for the purpose of viewing and/or modifying account information, and executing one or more account functions based on specific permissions you assign them. A Authorized user is someone other than an employee or officer of the taxpayer (for example, an accountant or attorney).

By adding a new Authorized User, you are certifying that you designate that individual as an authorized agent of the taxpayer and allow that individual to have access via this portal to confidential State of US tax information for the periods indicated; for the Tax Account[s] selected; and in order perform any Taxpayer Functions selected.

[Add New Authorized User](#)

Search:

User Name	User ID	Taxpayer Name	Effective Start Date	Effective End Date	Status
Jane Doe	Authorized123	MTC LLC	07/01/2024		Active

Showing 1 to 1 of 1 entries

⏪ < 1 > ⏩



Administrator/Authorized User Bulk Filing

Administrators and **Authorized Users** who have been granted access can bulk file withholding reconciliation information by selecting **File Bulk Returns** from the **Transmitter Transactions** menu. Reference the **W2/1099 Bulk Upload Guide** for additional filing instructions.

The screenshot displays the Maryland Tax Portal interface. The top navigation bar includes 'Home', 'Profile Information-', 'Account Inquiry-', 'Online Services-', 'Transmitter Transactions', and 'Secure Message Center-'. The 'Transmitter Transactions' menu is highlighted with a red box, and its dropdown menu is open, showing 'File Bulk Returns' (also highlighted with a red box) and 'View Transmissions'. The main content area is divided into several sections: a welcome message for Jane Doe, a 'User Profile Summary' section, an 'Account Information' section for MTC LLC, and an 'Account Balances' section with a green banner stating 'This taxpayer has no outstanding debt.' A table of transactions is visible, showing two entries for 'WITHHOLDING/FILING' and 'WITHHOLDING/RECONCILIATION'.

Transaction Type	CRN	Address
WITHHOLDING/ FILING	CRN: 35664868	45 CALVERT ST, ANNAPOLIS, MD 21401-1994 UNITED STATES
WITHHOLDING/ RECONCILIATION	CRN: 35664868	45 CALVERT ST, ANNAPOLIS, MD 21401-1994 UNITED STATES



WELCOME TO MARYLAND TAX CONNECT!

You have now successfully granted access to an **Authorized User for Bulk Filing W2/1099**

For additional assistance email us at **efilew21099help@marylandtaxes.gov** or contact Taxpayer Services Monday-Friday, 8:30am-4:30pm. EDT at 1-800-638-2937 or 410-260-7980.