

Delaware Taxpayer Portal – Linking/Entity Administrator Guide

The following pages outline the steps required to link a taxpayer to your Registered User account in the Portal as an Administrator.

We have developed the following definitions to assist in this process:

Administrator: Account Administrators will have the overall access for the Taxpayer Entity along with all accounts under that Taxpayer Entity. There can be multiple Administrators for each Taxpayer Entity. Administrators can add/remove/update authorized user(s) and grant access to their tax account(s). Please ensure that you are only linking to the entity as the Administrator if you are in an authorized position within your organization.

Authorized User (or Delegated User): An authorized user is delegated by the Administrator(s) to have access to a Taxpayer Entity and/or selected tax account(s). This role allows delegated users to perform specific functions such as filing returns, making payments, etc. without having the high-level access that the Administrator has. There is no limit on the number of authorized users available under a Taxpayer Entity, nor the combination of access to the Taxpayer Entity or tax account(s). Each authorized user is delegated access as deemed appropriate by their Administrator(s).

Registered User: A Registered User is anyone with a valid Portal User ID and Password.

Tax Account: Tax accounts are the accounts specific to the Taxpayer Entity. For example, an entity may have a Gross Receipts account, Withholding account, Personal Income Tax account, etc. Each account may have a unique operating name, mailing address, license, etc.

Taxpayer Entity: The Taxpayer Entity is the high-level view of the tax account(s). All tax accounts administered by the entity are linked to these identifiers and considered to be part of the Taxpayer Entity.

Administrator Linking to a Taxpayer Entity

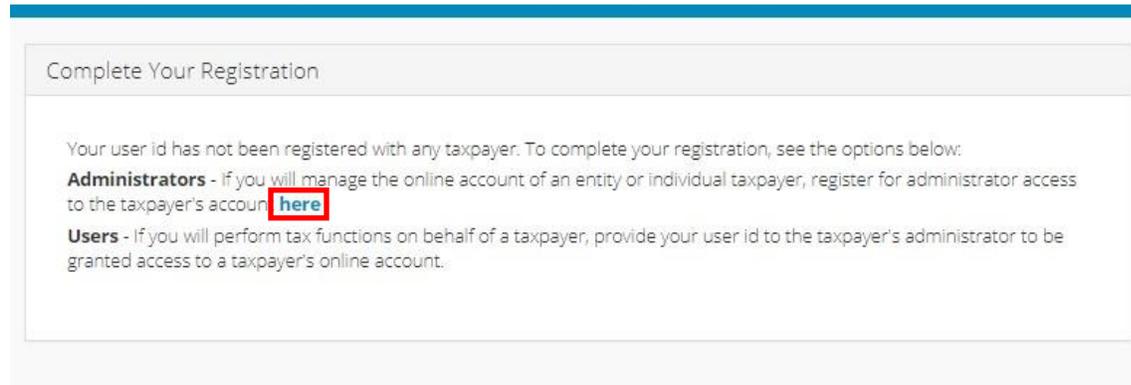
This section outlines how an Administrator can link their Portal User ID to their Taxpayer Entity. Once completed, the Taxpayer Entity will be saved to your Portal profile for future use.

Prior to linking to a Taxpayer Entity, a Registered User Portal account is required. For details on how to create a Portal account, please refer to the Sign-Up Guide.

Linking to a Taxpayer Entity

1 New Users

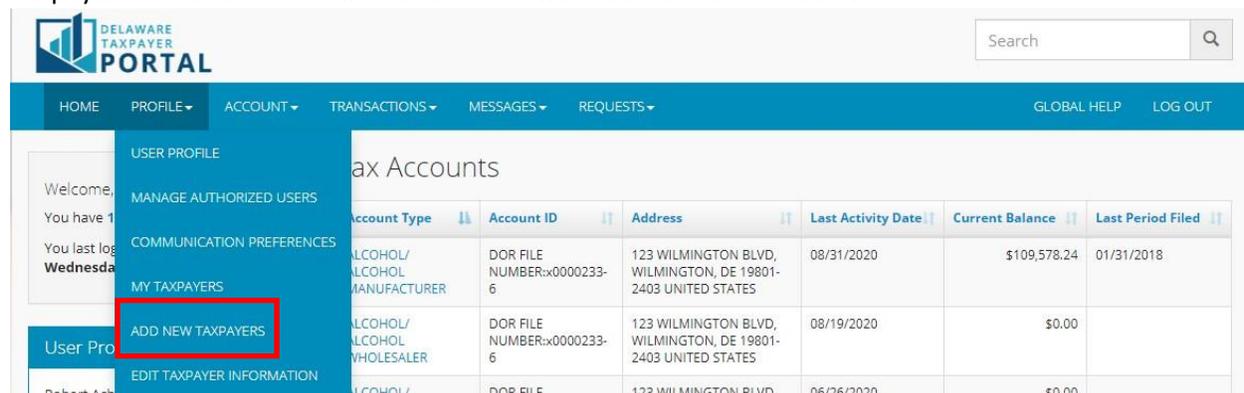
If your Portal User ID is not currently linked to any tax entities or accounts, a screen will appear titled Complete Your Registration. Proceed by clicking on the hyperlink “here”.



2 Linking additional accounts as an Administrator

There may be instances where a Portal user is required to have Administrator access to more than one Taxpayer Entity. If this is the case, you can easily link to additional tax entities using the following steps.

Log in to Portal and navigate to the “Profile” header. In the drop-down menu, select “Add New Taxpayers”. You can then follow one of the two methods outlined below.



2.1 There are three ways to link to your Taxpayer Entity.

Option 1 – Link via FEIN and PIN.

Option 2 – Link via SSN and PIN.

Option 3 – Link via Personal Income Tax Return Information

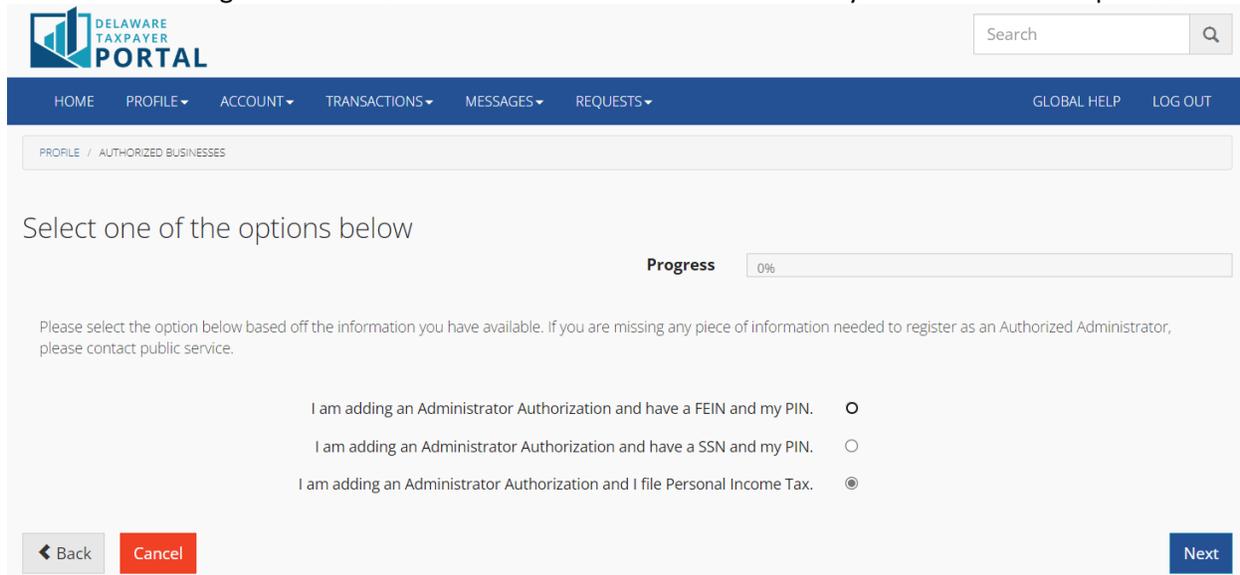
Link using FEIN and PIN

The simplest way to link your account is via PIN. PIN communications are mailed to the Taxpayer Entity's address as registered with the Division of Revenue.

If you do not have a PIN or your PIN has expired, please contact the Division of Revenue at 1-302-577-8200 to receive a new PIN.

1 Begin linking process

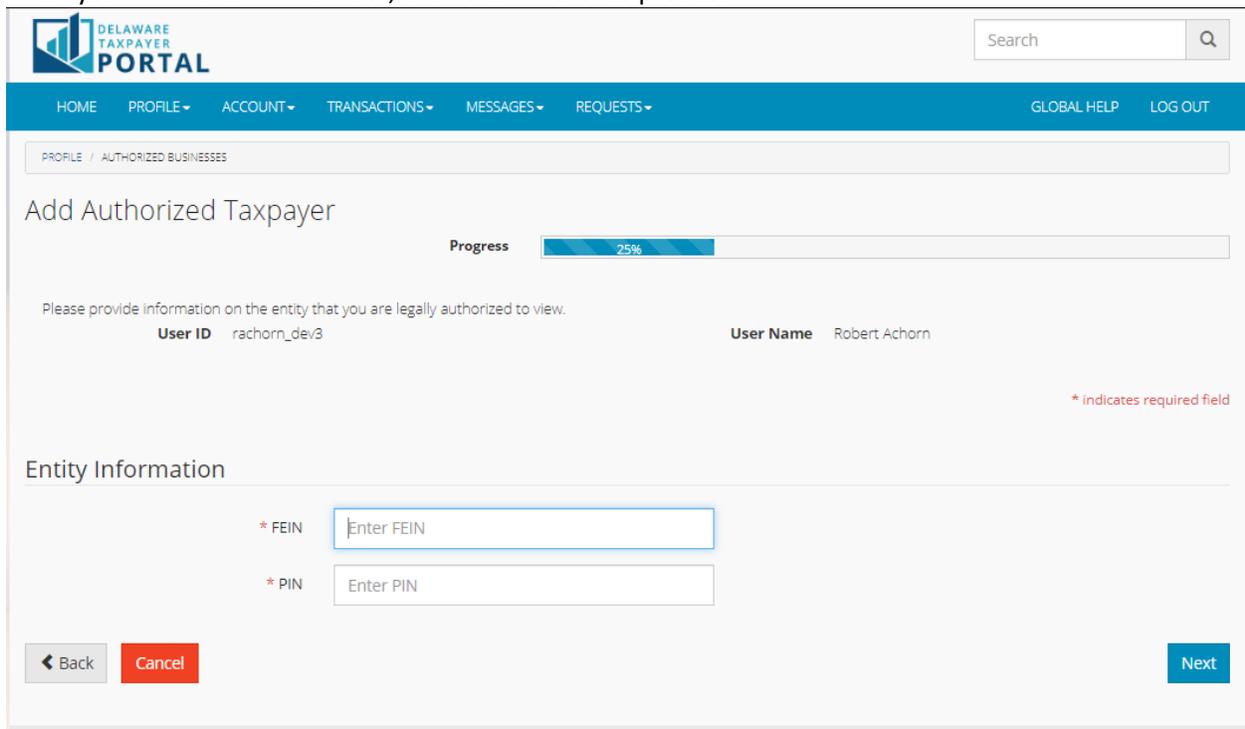
Select "I am adding Administrator Authorization and have a FEIN and my PIN" and "Next" to proceed.



The screenshot shows the Delaware Taxpayer Portal interface. At the top left is the logo. A search bar is on the top right. A navigation bar contains links for HOME, PROFILE, ACCOUNT, TRANSACTIONS, MESSAGES, REQUESTS, GLOBAL HELP, and LOG OUT. Below the navigation bar, the breadcrumb "PROFILE / AUTHORIZED BUSINESSES" is visible. The main content area has the heading "Select one of the options below" and a progress indicator showing "Progress 0%". A message states: "Please select the option below based off the information you have available. If you are missing any piece of information needed to register as an Authorized Administrator, please contact public service." Three radio button options are listed: "I am adding an Administrator Authorization and have a FEIN and my PIN." (unselected), "I am adding an Administrator Authorization and have a SSN and my PIN." (unselected), and "I am adding an Administrator Authorization and I file Personal Income Tax." (selected). At the bottom, there are "Back" and "Cancel" buttons on the left, and a "Next" button on the right.

2 Enter required information

Enter your FEIN and PIN number, then click “Next” to proceed.



DELAWARE TAXPAYER PORTAL

Search

HOME PROFILE ACCOUNT TRANSACTIONS MESSAGES REQUESTS GLOBAL HELP LOG OUT

PROFILE / AUTHORIZED BUSINESSES

Add Authorized Taxpayer

Progress 25%

Please provide information on the entity that you are legally authorized to view.

User ID rachorn_dev3 User Name Robert Achorn

* indicates required field

Entity Information

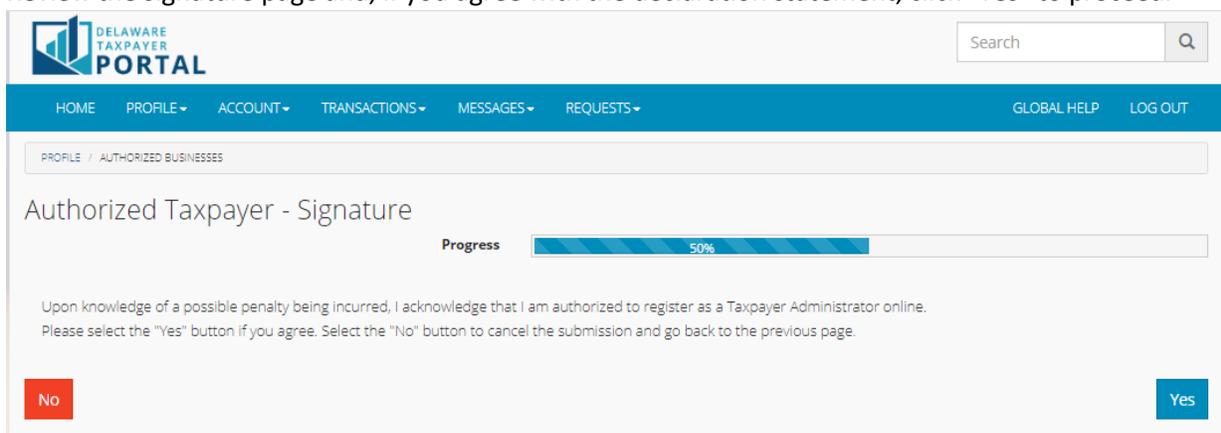
* FEIN

* PIN

Back Cancel Next

3 Complete signature page

Review the signature page and, if you agree with the declaration statement, click “Yes” to proceed.



DELAWARE TAXPAYER PORTAL

Search

HOME PROFILE ACCOUNT TRANSACTIONS MESSAGES REQUESTS GLOBAL HELP LOG OUT

PROFILE / AUTHORIZED BUSINESSES

Authorized Taxpayer - Signature

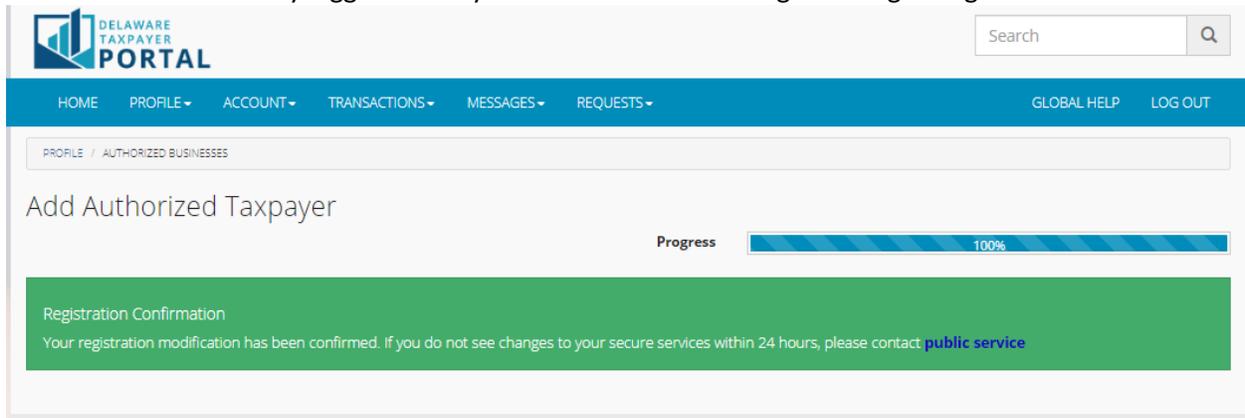
Progress 50%

Upon knowledge of a possible penalty being incurred, I acknowledge that I am authorized to register as a Taxpayer Administrator online. Please select the "Yes" button if you agree. Select the "No" button to cancel the submission and go back to the previous page.

No Yes

4 PIN linked successfully

You will be automatically logged out of your account. Click on “Log In” to sign in again.



The screenshot shows the Delaware Taxpayer Portal interface. At the top left is the logo. A search bar is at the top right. A navigation menu includes HOME, PROFILE, ACCOUNT, TRANSACTIONS, MESSAGES, REQUESTS, GLOBAL HELP, and LOG OUT. The breadcrumb trail reads 'PROFILE / AUTHORIZED BUSINESSES'. The main heading is 'Add Authorized Taxpayer'. A progress bar indicates 100% completion. A green confirmation box contains the text: 'Registration Confirmation. Your registration modification has been confirmed. If you do not see changes to your secure services within 24 hours, please contact [public service](#)'.

Congratulations, you have now successfully linked your account as an Administrator!

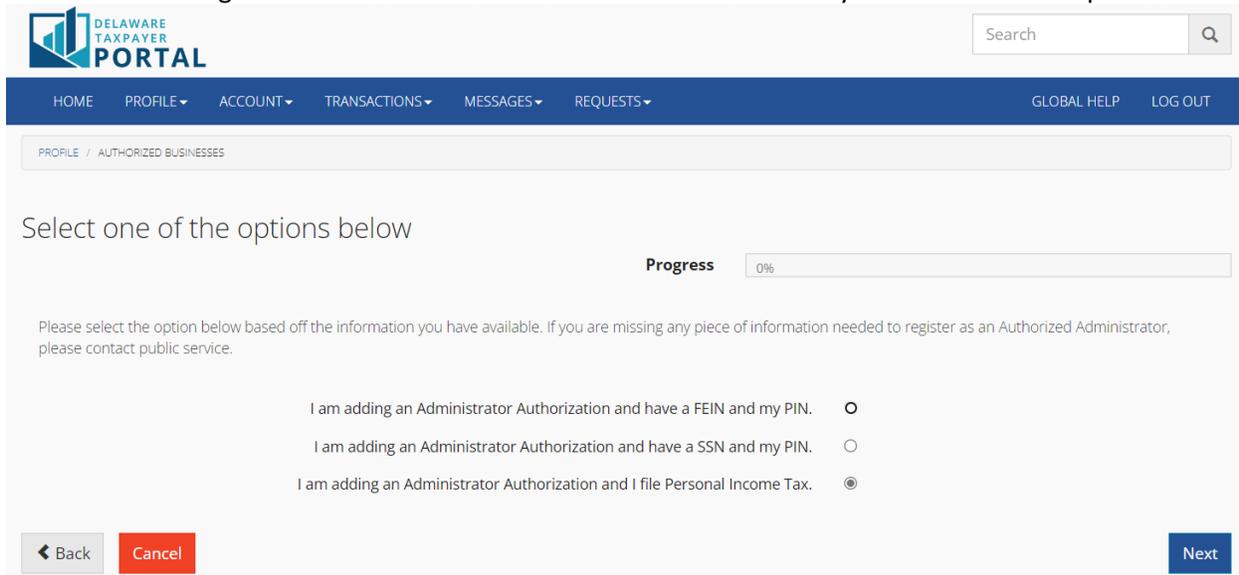
Link using SSN and PIN

PIN communications are mailed to the Taxpayer Entity's address as registered with the Division of Revenue.

If you do not have a PIN or you PIN has expired, please contact the Division of Revenue at 1-302-577-8200 to receive a new PIN.

1 Begin linking process

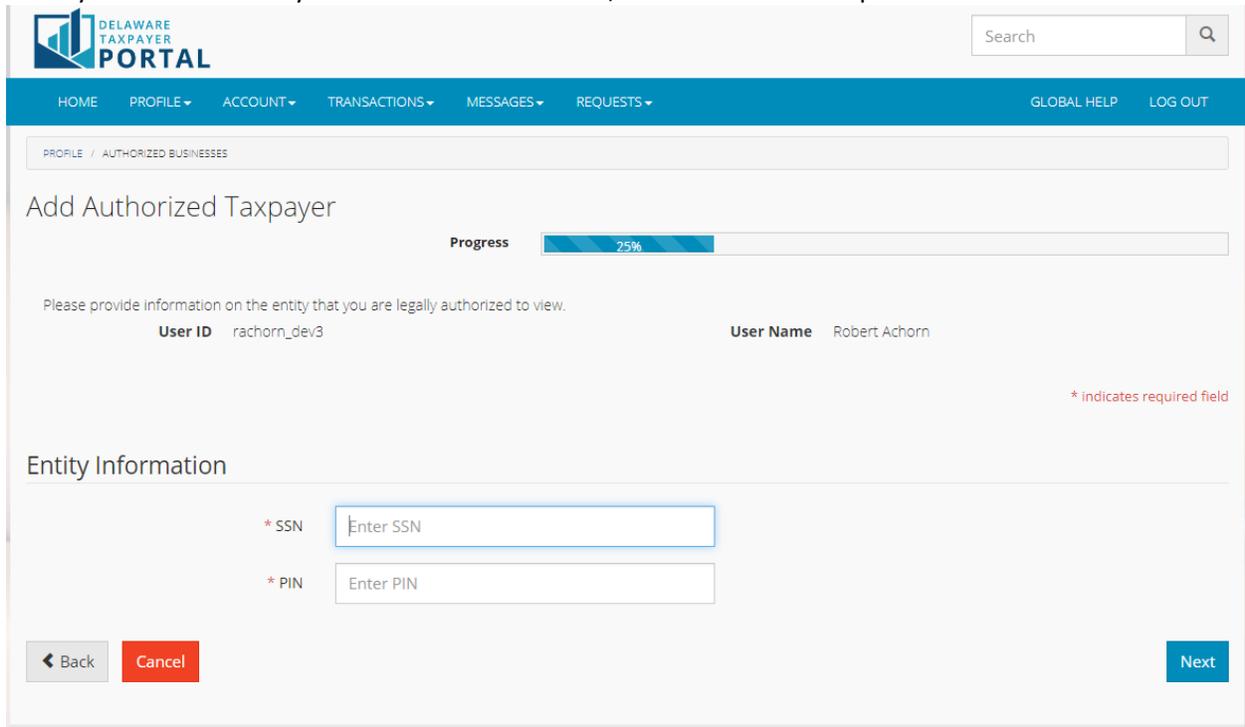
Select "I am adding Administrator Authorization and have a SSN and my PIN" and "Next" to proceed.



The screenshot shows the Delaware Taxpayer Portal interface. At the top left is the logo. A search bar is on the top right. A navigation bar contains links for HOME, PROFILE, ACCOUNT, TRANSACTIONS, MESSAGES, REQUESTS, GLOBAL HELP, and LOG OUT. Below the navigation bar, the breadcrumb trail reads "PROFILE / AUTHORIZED BUSINESSES". The main content area is titled "Select one of the options below". To the right of this title is a progress indicator labeled "Progress" with a bar showing "0%". Below the title, there is a paragraph of instructions: "Please select the option below based off the information you have available. If you are missing any piece of information needed to register as an Authorized Administrator, please contact public service." Three radio button options are listed: "I am adding an Administrator Authorization and have a FEIN and my PIN." (unselected), "I am adding an Administrator Authorization and have a SSN and my PIN." (unselected), and "I am adding an Administrator Authorization and I file Personal Income Tax." (selected). At the bottom left are "Back" and "Cancel" buttons, and at the bottom right is a "Next" button.

2 Enter required information

Enter your Social Security Number and PIN number, then click “Next” to proceed.



DELAWARE TAXPAYER PORTAL

HOME PROFILE ACCOUNT TRANSACTIONS MESSAGES REQUESTS GLOBAL HELP LOG OUT

PROFILE / AUTHORIZED BUSINESSES

Add Authorized Taxpayer

Progress 25%

Please provide information on the entity that you are legally authorized to view.

User ID rachorn_dev3 User Name Robert Achorn

* indicates required field

Entity Information

* SSN

* PIN

Back Cancel Next

3 Complete signature page

Review the signature page and, if you agree with the declaration statement, click “Yes” to proceed.



DELAWARE TAXPAYER PORTAL

HOME PROFILE ACCOUNT TRANSACTIONS MESSAGES REQUESTS GLOBAL HELP LOG OUT

PROFILE / AUTHORIZED BUSINESSES

Authorized Taxpayer - Signature

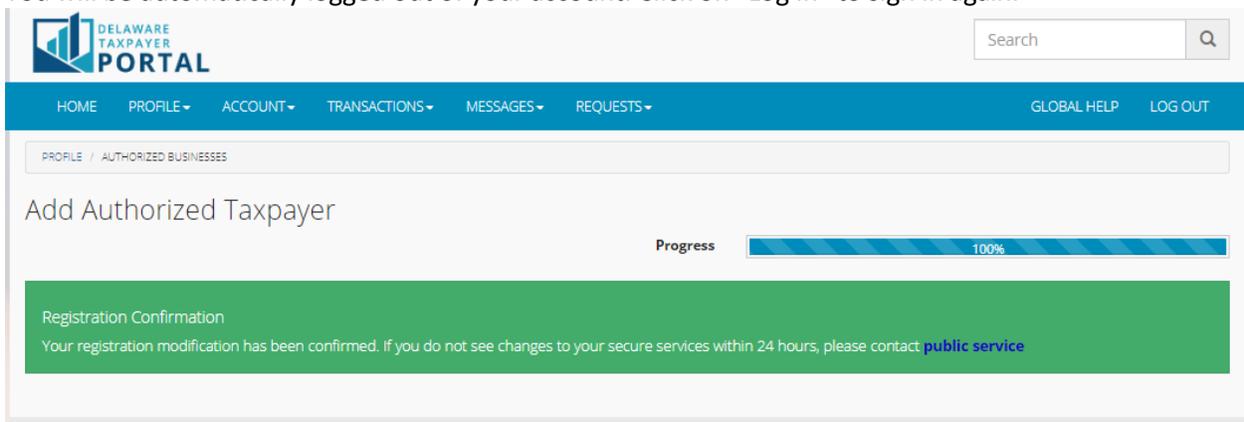
Progress 50%

Upon knowledge of a possible penalty being incurred, I acknowledge that I am authorized to register as a Taxpayer Administrator online. Please select the "Yes" button if you agree. Select the "No" button to cancel the submission and go back to the previous page.

No Yes

4 PIN linked successfully

You will be automatically logged out of your account. Click on “Log In” to sign in again.



The screenshot shows the Delaware Taxpayer Portal interface. At the top left is the logo. A search bar is at the top right. A navigation menu includes HOME, PROFILE, ACCOUNT, TRANSACTIONS, MESSAGES, REQUESTS, GLOBAL HELP, and LOG OUT. The breadcrumb trail reads 'PROFILE / AUTHORIZED BUSINESSES'. The main heading is 'Add Authorized Taxpayer'. Below it is a progress bar labeled 'Progress' which is filled to 100%. A green confirmation box contains the text: 'Registration Confirmation. Your registration modification has been confirmed. If you do not see changes to your secure services within 24 hours, please contact [public service](#)'.

Congratulations, you have now successfully linked your account as an Administrator!

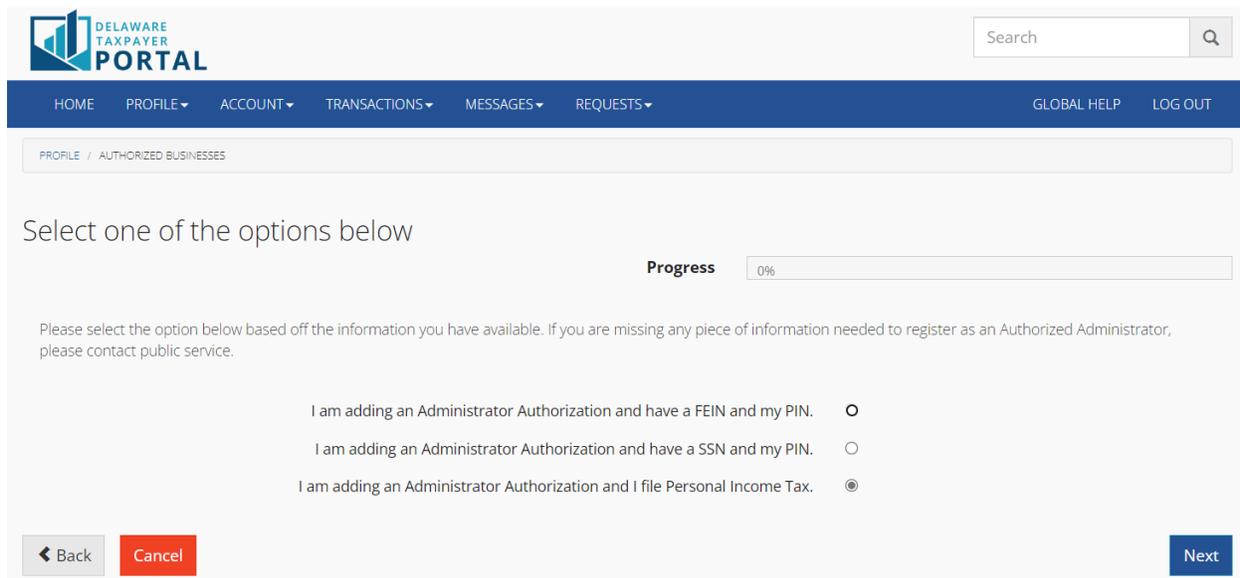
Link using Personal Income Tax Information

Provide information from your most recently filed Delaware Personal Income Tax return.

If you do not have this information or have never filed in Delaware, please contact the Division of Revenue at 1-302-577-8200 to request a PIN.

1 Begin linking process

Select “I am adding an Administrator Authorization and I file Personal Income Tax” and “Next” to proceed.



The screenshot shows the Delaware Taxpayer Portal interface. At the top left is the logo, and at the top right is a search bar. A navigation bar contains links for HOME, PROFILE, ACCOUNT, TRANSACTIONS, MESSAGES, REQUESTS, GLOBAL HELP, and LOG OUT. The breadcrumb trail reads 'PROFILE / AUTHORIZED BUSINESSES'. The main heading is 'Select one of the options below'. A progress indicator shows 'Progress 0%'. Below this is a note: 'Please select the option below based off the information you have available. If you are missing any piece of information needed to register as an Authorized Administrator, please contact public service.' Three radio button options are listed: 'I am adding an Administrator Authorization and have a FEIN and my PIN.', 'I am adding an Administrator Authorization and have a SSN and my PIN.', and 'I am adding an Administrator Authorization and I file Personal Income Tax.' The third option is selected. At the bottom are 'Back', 'Cancel', and 'Next' buttons.

2 Enter required information

Enter your Social Security Number, First Name, Last Name, Most Recent Filing Status, Most Recent Refund Amount (\$0 if no refund was requested), and Most Recent Delaware Adjusted Gross Income from the original return, then click “Next” to proceed.

Taxpayer Information

* SSN

* First Name

* Last Name

* Most Recent Filing Status From Original Return

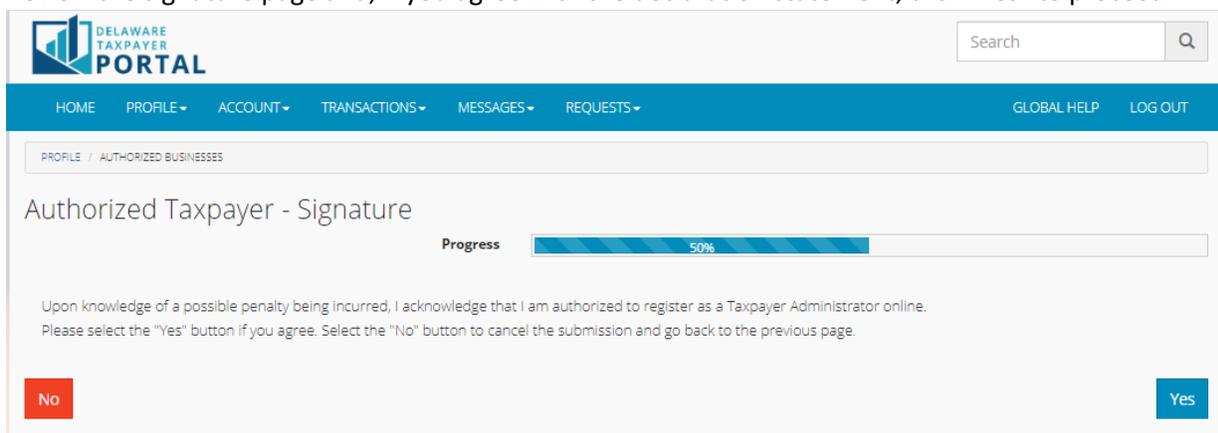
* Most Recent Refund Amount From Original Return \$

* Most Recent Delaware Adjusted Gross Income From Original Return \$

[Back](#) [Cancel](#) [Next](#)

3 Complete signature page

Review the signature page and, if you agree with the declaration statement, click “Yes” to proceed.



DELAWARE TAXPAYER PORTAL

HOME PROFILE ACCOUNT TRANSACTIONS MESSAGES REQUESTS GLOBAL HELP LOG OUT

PROFILE / AUTHORIZED BUSINESSES

Authorized Taxpayer - Signature

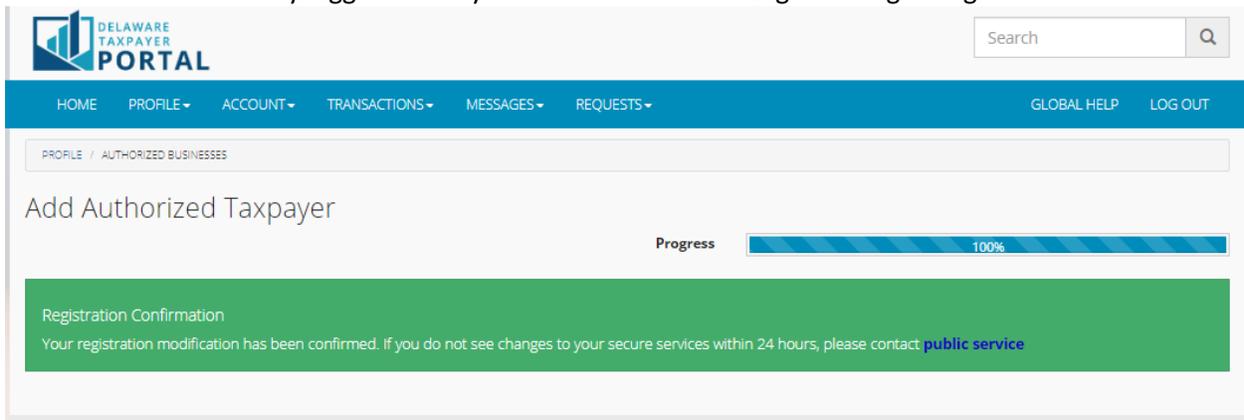
Progress

Upon knowledge of a possible penalty being incurred, I acknowledge that I am authorized to register as a Taxpayer Administrator online. Please select the "Yes" button if you agree. Select the "No" button to cancel the submission and go back to the previous page.

[No](#) [Yes](#)

4 Taxpayer Entity linked successfully

You will be automatically logged out of your account. Click on “Log In” to sign in again.



Congratulations, you have now successfully linked your account as an Administrator!