# Table of Contents

- **Overview - Oklahoma Taxpayer Access Point** ................................................................. 3
- **Navigating OkTAP** ........................................................................................................... 4
- **Registering for OkTAP** ..................................................................................................... 5
- **Things You Can do with OkTAP** ....................................................................................... 12
- **Letters & Permits** ........................................................................................................... 17
- **Viewing and Sending Notices** .......................................................................................... 17
- **Requests** .......................................................................................................................... 19
- **Accounts** ........................................................................................................................ 20
- **Filing a Return** ............................................................................................................... 22
- **Ordering Cigarette Stamps On OkTAP** ......................................................................... 26
- **Access Chart — Types and Levels** ................................................................................. 33
- **Navigation Menu Details - Account Level** .................................................................... 34
- **Withholding Registration Application** ........................................................................... 37

To link directly to a topic: hover over the Table of Contents section title, and click.

**Note:**
All account numbers, company names, and graphic examples are fictitious. Any resemblance to an actual company or taxpayer is completely coincidental.
OVERVIEW - OKLAHOMA TAXPAYER ACCESS POINT

Oklahoma Taxpayer Access Point (OkTAP) is an additional way to access your tax information. Taxpayers who choose to register for OkTAP will have the ability to manage and monitor their tax accounts via the internet anytime, anywhere.

Online messaging is also available and provides a secure connection for the taxpayer and/or their agent to submit a message to an Oklahoma Tax Commission (OTC) representative.

TAX TYPES CURRENTLY SUPPORTED IN OkTAP

Currently, there are three tax types supported in OkTAP: Alcohol, Cigarette, and Tobacco. Over the next few years additional tax types will become available for access through OkTAP.

<table>
<thead>
<tr>
<th>Tax Type Supported</th>
<th>Account Balance and Activity</th>
<th>View and Print OTC Correspondence</th>
<th>File or Amend Returns</th>
<th>On-Line Messaging</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alcohol</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Cigarette</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Tobacco</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

FILERS WHO USE THE OTC ONLINE FILING
User IDs and passwords used on QuickTax, the Business Tax Filing System, will not work with OkTAP. The taxpayer must register to use OkTAP.

FREQUENTLY ASKED QUESTIONS
Users who have questions while using OkTAP should navigate to the blue FAQs link located at the left side of every screen.

When users log out of OKTAP they should always close the web browser to ensure that none of their personal data remains in the computer’s cache memory.
NAVIGATING OkTAP

OkTAP uses a number of pop-ups to provide options throughout the interface. Therefore, it is recommended you disable the Pop-up Blocker Settings and allow pop-ups from the OkTAP website.

OkTAP will automatically log off after 15 minutes of inactivity.

Navigation in OkTAP is done by using the on-screen navigation hyperlinks described below. The bar along the left side of the window will be available from every screen.

A. The sidebar on the left of the window contains four key elements:
   1. The OkTAP icon will take you to the Oklahoma Tax Commission website.
   2. The Menu section contains options for Home, Back, and Log Off. Back will become active once you have moved beyond the Home screen.
   3. The Navigation section provides links to:
      a. My Accounts – these are the accounts that have been registered for access through your OkTAP login.
   **The next group of options will change depending on where you are within your OkTAP account(s).**
   4. Help Links section provides links to the Frequently Asked Questions (FAQ’s) and an electronic copy of this guide.

B. This section displays basic organization information; name, Federal Employer ID or Social Security Number, and overall balance for all accounts that are registered for access through OkTAP.

C. In the top right of the screen is the DBA Name and Mailing Address. This will change to account specific name and mailing address when using the Accounts tab.

D. The main portion of the screen is organized into four tabs:
   1. Accounts - contains the list of accounts that have been specified as part of this profile with a small summary.
   2. Requests – items that have been submitted, such as, a return or change of address.
   3. Notices – messages from the OTC or confirmation that a request has been completed.
   4. Letters & Permits – Letters or permits that have been printed and sent.
OkTAP Colors

The fields on the forms are color-coded to help tell you what actions are allowed or needed for each particular item:

- **Green**: enter information (optional)
- **Yellow**: field is required in order to be submitted
- **Red**: field is in error
- **White**: field is automatically calculated and cannot be modified

Click or hover over the red error field for explanation about the error.

Registering for OkTAP

Several tax type accounts are available through OkTAP. (See chart on page 3.) Any taxpayers who have tax accounts available through OkTAP are eligible to register for an OkTAP logon.

The first individual that registers themselves in OkTAP under a company’s FEIN is considered the Master Account Holder. Only the Master Account Holder can manage logons, request to cease an account, and set up Direct Deposit for any tax refunds associated with their account(s). The Master Account Holder will also be alerted by email whenever a subsequent account is accessed under the same FEIN.

It is an easy two-step process to begin using OkTAP to access your tax information:

1. **Register to use OkTAP** – provide initial information and an Authorization Code will be emailed to you
2. **Initial Logon** - Authorization Code required

How Does a Taxpayer Register on OkTAP?

You will need the following information

- **Account Number**: 13 digit account number; located on all correspondence received from OTC after October 10, 2011 for all participating tax types.
- **Federal Employer Identification Number (FEIN) for Business Registration**
- **Social Security Number for individuals, Sole Proprietor**
- **Logon ID**: You will create a Logon ID (up to 30 characters; **not** case sensitive; spaces are allowed)
- **Password**: **Password must be at least 10 characters long** and contain the following:
  - At least 1 upper-case letter
  - At least 1 lower-case letter
  - At least 1 number
- **Valid e-mail address to receive confirmation and Authorization Code messages.**
**Steps to register for OkTAP:**

1. Click the button: **Sign Up Now!**

2. To begin the registration process click the link, **Step 1 of 3: Personal Information**
   a. Complete the required information and click **OK**:
      i. -Your name
      ii. -Email address: must be valid to receive confirmation of registration and Authorization Code for the initial login
      iii. -Contact Phone: (required for business taxes)
      iv. -Alternate Phone: (optional)
Once the first window is completed the information entered will appear on the registration page and the next link will become available.

3. Click **Step 2 of 3: Create Logon Credentials**

Complete the required information and click **OK**:

- **Logon ID**: (30 character maximum)
- **Password**: Passwords **must** contain 10 or more characters and include:
  - At least 1 upper-case letter
  - At least 1 lower-case letter
  - At least 1 number
- **Secret Question and Answer**
4. Click **Step 3 of 3: Customer and Account Information**

Complete the required information and click **OK**:
- Select the ID type (Federal or Social Security ID number)
- Enter the ID Number
- Account Type (using the drop down arrows)
- Account Number
- Account Zip Code

5. Click the **Submit** button to complete the registration.
Next, you will receive an OkTAP confirmation screen. The confirmation screen will provide the New Registration request confirmation number.

Thank you for signing up for Oklahoma Taxpayer Access Point (OkTAP)!
You will receive an e-mail shortly confirming your request.
This email contains an authorization code that will be used to complete your registration.
This authorization code will be required the first time you sign into OkTAP.
Click OK to the left to proceed.
If you have questions or concerns, many of these answers can be found in our helpful OkTAP FAQs or OkTAP Guide found to the left.

NOTE: If you do not receive an email within 24 hours of registering, please contact the Oklahoma Tax Commissioner help desk at (405) 521-3863.

The OkTAP Registration request will be processed and you will receive your Authorization Code within a few minutes. The Authorization Code is required for your initial login and will be sent to the e-mail account specified during the registration process.

Below is an example of the Authorization Code e-mail:

**THIS IS AN AUTOMATED MESSAGE. PLEASE DO NOT REPLY TO THIS EMAIL.**

Welcome to OkTAP!
We have processed your registration for Logon ID smanager
The first time you login to OkTAP, the authorization code R3XVYM is required.

Click here to login

STORE MANAGER
1234 FAKE ST OKC, OK 00000-0000
LOGGING ON FOR THE FIRST TIME

Once registration is complete, your Authorization Code will be sent to the specified e-mail address. The Authorization Code must be used to logon for the first time.

WHAT IF I FORGET MY PASSWORD?
If you forget your OkTAP password, you can reset your password yourself.

Click the tab: Forgot my Password on the main Logon screen. Initially, only the first two items will be displayed in the window. Enter in your Logon ID, and then click the Next button.
Answer the Secret Question you set up at your initial registration, and enter in your new password.

A confirmation window will display, and an email will be sent to your email address confirming the password has been changed, with a new authorization code (example notice below).

Click on the **Click here to login** hyperlink. This will take you back the Logon window.

**THIS IS AN AUTOMATED MESSAGE. PLEASE DO NOT REPLY TO THIS EMAIL.**

Your password for OkTAP has been changed.

The first time your new password is used in OkTAP, the authorization code **UYK31HC**

Click here to login.

If you have any questions or concerns, or received this message in error, please call the Oklahoma Tax Commission at (405) 521-3069.
**THINGS YOU CAN DO WITH OkTAP**

Once you have received your Authorization Code and have logged in for the first time, you are ready to manage your tax accounts, submit returns, exchange messages or *notices* with an OTC representative, and view correspondence.

The **Home** window contains two options in the **Navigation** menu group, My Profile and Add Access to Another Account.

Each of the four tabs available, Accounts, Requests, Notices, and Letters & Permits will be discussed in a later section.

**MY PROFILE**

Your profile acts as an umbrella to all of the accounts available through OkTAP. This is called the **Taxpayer level**. Any changes made to your profile will affect and govern all the accounts you specify for access through OkTAP.

---

**My Profile** - From My Profile, you can update your web profile information, cancel your online access, and change your password from the *I Want To* menu in the top right of the window. The Master Account Holder is also able manage any logons that have access to his or her accounts using the tabs in the main body of the window.
**Update Profile** – Clicking on Update Profile link allows you to edit any information for your OkTAP Web Profile.

Click **Save** when you are finished updating your information.

**Cancel My Online Access** – Clicking on Cancel My Online Access, a pop-up window will appear asking to confirm your decision to cancel your access. This **does not** close or cease your tax accounts, it simply cancels your ability to view those accounts online. If you cancel your online access in error, the Master Account Holder will be able to re-instate your access through Manage Logons.

**Change Password** - Clicking on Change Password allows the taxpayer to voluntarily change their password. You will be required to enter your current password in order to change it. The last 12 previous passwords may not be used. All other password rules still apply.
Manage Logons

**Logons tab** – Under Manage Logons, the Master account holder is able to see a list of all Web Logons that have access to any of the accounts. To inactive a logon, click the Active link and remove the check mark from the active box. Then click the **Save** action button.

**Settings tab** – Using the Settings tab the Master account holder is also able to disallow any new logons under the business’s FEIN or the sole proprietor’s SSN, and set their default Access Level. (See table at the end of this document for more information on what different Access Levels are able to do.) Once all the logons you need for your business have been created through the registration process, it is recommended that **New Logons Allowed** be set to **No**. This will prevent any additional logons from being created until you change the setting.
**Access to My Accounts** – this tab allows the Master account holder to control the kind of access on a per account basis per logon account using the link in the Access Level column.

If you want to change the access level of a certain account, or allow or disallow a Web Logon access to that account, click on the blue Access Level hyperlink and choose the appropriate action.

To remove any kind of access from a particular account use the appropriate combination of the Active check box and the Access Level. If a check mark already exists, click into the check box to remove the check mark to inactivate access to the account. The results of the changes will be shown in the Access Level and Active columns.

The options for Access Level are: All Access, File (returns), View.
ADD ACCESS TO ANOTHER ACCOUNT

The second menu option on the Home window is Add Access to Another Account. This option allows you to specify other accounts to be available through OkTAP for your logon. The type of access allowed will be the default access defined in your profile.

Add Access to Another Account – When you click the link the window will change to the example window below. Use the drop down menu to select the type of account you want to add. Provide the Account ID and the Zip Code. The system will validate whether or not this FEIN/SSN and Account ID combination exists in the system.

To add online access to your Oklahoma Tax Account:

Enter the Oklahoma Tax Account ID (e.g., ALC-10000000-99) and Zip Code of the account you are adding. This is not your FEIN or SSN.

Account you wish to access:

- Account Type:
- Account ID:
  \(\text{e.g., ALC-10000000-99}\)
- Account Zip Code:

When you are finished, click the green submit on the left of the page.

NOTE: Additional accounts may be added one at a time by repeating this process.
In the **Home** window there are four tabs available, Accounts, Requests, Notices, and Letters & Permits. Each of these tabs will provide different information, but all will be at an overall taxpayer level.

Each tab will be discussed in reverse order:

**LETTERS & PERMITS**

You can view letters and permits that you have received from the OTC by clicking on the tab labeled Letters & Permits.

To view and print a letter or permit, click on the Letter ID hyperlink.

**VIEWING AND SENDING NOTICES**

Click the Notice tab, to send and receive messages from the OTC.
When there are unread notices there will be three tabs within the Notices tab. By default the Unread tab will open when new notices have been received. In each tab you will click the Subject title hyperlink to open a notice.

- **Unread** – this tab will list all notices that have not yet been read.
- **Inbox** – will contain all notices that have been read.
- **Outbox** – contains all notices that have been sent.

To send a Notice, you will need to have the Outbox tab open. Click the link, 'Click Here to Send Notice'.
A send notice window will open and you will be able to choose a message type.

- Account Question – question or notice is associated with a specific tax account
- Reply – response to a previous notice
- TAP Question – question specific to the OkTAP functionality
- Urgent Question – notice is time sensitive

Next, enter a subject for your notice, and then the body of your notice.

Click the **Send Message** button on the left when you are ready to send.

**REQUESTS**

A request is any action performed through OkTAP—Registering, Filing a return, Adding Access to Another Account, etc. When you click the Request tab, you can view your requests and see their status. To open a request to look at the detail, click the Title hyperlink.
ACCOUNTS

You can open the Accounts tab by clicking either the My Accounts menu option or by clicking the Accounts tab. The Accounts tab will list all the accounts that you have access to through your logon.

Always located on the top right of the window, are the Add and/or Edit links to update DBA Name and Mailing Address information. When you are at the Home or Taxpayer level window, this information will pertain to the business in general.

To add or change the DBA Name, click the link and complete the form that opens.

Click the Submit button to send the request for processing to the OTC.
Account Details

To view the account details click on the Account ID hyperlink. That specific account will then be shown. Notice the top of the window has changed; the left side displays the name of the tax type and summary information about the account. If the logon has All Access, the DBA Name and Mailing Address would be available for editing.

The Navigation menu has changes at the account level. There are new options that are specific to the type of tax account you have open. The options available are:

Close Account – request to close the tax account. You will need to provide a closure date and reason. There is also a provision for providing information is the business is being sold.

Submit Attachment – provides a way to send attachments to the OTC.

Make a Payment – will connect you to the OTC websit to use OK.gov to make an electronic payment.

Refund Deposit – provides a way to submitt banking information so that refunds can be completed electronically.

Order Stamps – this option is only available for Cigarette Wholesale Tax. Provides the ability to order cigarette stamps online.

For details of each of these options see the section, Navigation Menu Details – Account Level at the end of this document.
You can file returns by clicking on the *File Now* hyperlink.

**FILING A RETURN**

In your OkTAP Account, under the Period List, will appear a different blue link tags:

- **File Now** – Return has not yet been filed
- **View Request** – Return has been saved to finish later, or was filed and has not yet been processed by the OTC
- **View Return** – Return has been filed and processed by the OTC

Clicking on **View Request** or **View Return** opens up a “View Only” copy of the return.
Once the return opens, you have the option to **Change** the return or **Print** a copy for your return. These additional options are located on the sidebar.

Selecting the View Request means you are opening a return that has been started, but not yet submitted to the OTC. You will see an additional option of **Withdraw Request**.
Clicking on File Now or Change, an electronic copy of the return form will open.

A. Green Submit button will submit your return. Your password will be required when the return is submitted, acting as an electronic signature.

B. Save and Finish Later will save the return as a stored request. This means that the return has not been filed, and will not be considered filed until it has been submitted.

C. The cancel button will discard any information entered into the return form.

D. The Attachment Box shows any attachments that have been added for that return.

E. For Cigarette and Tobacco Wholesalers, you have the option to enter your tribal sale deductions. Marking the “Enter Tribal Sales” checkbox will activate a blue link to the left of the checkbox. To enter your tribal sales, simply click on the blue link and fill out the table information.

F. Blue text like this shown are links that will open additional windows.

G. Account information is displayed in the upper right corner of the page, allowing quick information concerning the account, filing period, and due date.
Return Payment Options

The OTC encourages taxpayers to utilize electronic payment methods. To make an online payment, open the account and select the Pay link. Once the pay link has been selected, you will be redirected to an external payment site to make your payment.

Payments can be made through www.tax.ok.gov/payments.

When a return with tax due is submitted through OkTAP, you will be given the option to either make an online electronic payment, or create a payment voucher to send to the OTC with your check.

To create a payment voucher to send with your check, click the Add Voucher button. This button will be available in your confirmation window after a return with tax due has been submitted.

OkTAP will display a payment voucher with the current date and amount due reported on the return you submitted. Click Submit to create the voucher. The payment voucher is available for you to view and print from the Letters & Permits window.
Then click OK. Please note that online payments are only available to users who have All Access and File access levels to the account.

ORDERING CIGARETTE STAMPS ON OKTAP

Beginning March 5, 2012, Cigarette wholesalers will be required to order cigarette stamps online using their OkTAP login. Cigarette stamps will no longer be available to order through the OTC.

To order cigarette stamps through OkTAP:

Login to OkTAP and select your cigarette account from the account list. Click the Order Stamps hyperlink on left side of the page.
The Cigarette stamp order form will open. Clicking the blue hyperlinks will open additional windows that are explained on the following pages.

1. **Shipping Information**

   *The stamps will be sent to the address listed on the form.*

   The top portion of the form contains the shipping address and contact information that will be used to ship the stamps. Be sure to review this address.

   If the information is incorrect, or if you would like to use a different shipping address for this shipment only, click on the blue hyperlink, **Use different shipping information**. A pop up window will open where you can update the shipping information. The name, phone number, and email address refer to the person who should be contacted in case any questions arise.
Ordering Stamps

To specify the quantities you want to order, click the corresponding blue link of the type of stamp you want. A window will open allowing you to enter the number of rolls and/or pads you would like.

2 Oklahoma Cigarette Tax Stamp – Green Stamp

To order Green Oklahoma Stamps, click on the link. Enter in the number of rolls or pads for each type and then click the OK button.

*One pad is 20 sheets (3,000 stamps); this is the minimum pad order.*

3 Sales of State or Tribal Compact – Orange Stamp

To order Orange State/Tribal stamps, click on the hyperlink. Enter in the number of rolls or pads for each type; then click the OK button.
Federally Recognized Indian Tribes or Nations – Gray, Blue, Yellow Stamps

For Gray State Tribal Border Stamps, Blue New Compact Stamps, or Yellow Exception Stamps, click on the link. Enter the number of rolls or pads for each type and click the **OK** button.

![Order Blank](image)

The total for your stamp purchases, along with the merited discount and stamp count will automatically show on the main page. If you have existing credits in your account (from previously returned stamps, etc.) that amount will automatically be applied toward your next purchase. Your total that is due before your stamps will be shipped is found in bold on the bottom line of the main page.
**Submitting Your Order**

Once you have completed the form you are ready to submit your order. Click the green **Submit** button on the left side of the page.

A confirmation screen will appear to notify you that your order has successfully been submitted. You will need to refer to your confirmation number, if you have any questions or problems with your order. The amount due is also shown in bold.

**Paying for Your Stamps**

Stamps will not be issued until a payment has been received in full for the amount due. You may make your payment by clicking on the blue hyperlink, [www.tax.ok.gov/payments](http://www.tax.ok.gov/payments), on the confirmation screen, shown above. You will be redirected to the Oklahoma Tax Commission website’s payment screen.

There is also a **Make a Payment** link that is available for your convenience at the account level. This link performs in the same way as the link on your confirmation screen. You will be redirected to [www.tax.ok.gov/payments](http://www.tax.ok.gov/payments).
Shipment Confirmation Notice

After your payment is received, the cigarette stamps will be shipped to the address on the form using FedEx 2 day shipping. You will receive a confirmation notice in your OkTAP account Notices tab. The Notice will contain the FedEx tracking number that will allow you to track your order. You may track your cigarette stamp order by clicking on the numbers, or by visiting www.fedex.com/Tracking and entering in your tracking numbers.

Cancelling Your Order

You may cancel a cigarette stamp order through OkTAP only if it has not yet processed. Do this by clicking on the Requests tab in the account. Locate the Cigarette Stamp Order request you want to cancel. If the Request Status is "Pending..." your order has not processed and is eligible to be canceled.

To cancel your unprocessed order, click on the blue hyperlink, Cigarette Stamp Order, shown above. This will open your request. Click the Withdraw Request link on the left, and then confirm your action to cancel your order.

If your request status is “Completed”, your order cannot be cancelled through OkTAP. You will need to return your excess stamps using the existing process.
Utilizing Cigarette Credit

A taxpayer will be notified when a credit exists on their Cigarette Account. The credit will NOT display until you open the Order Stamps Form.

Once you complete the order form on the individual stamps type, those numbers will populate onto the Cigarette Stamp Order Form. (The example used was the Yellow Stamps.) The credit below has NOT been applied to the total order.

Once the “Use Available Credit” is checked, the credit will be applied to the order and the Total Amount Due will change.

When a credit exists on your Cigarette Stamp account you do not have to use the credit at that time. However, keep in mind that you cannot use a partial credit amount.
**ACCESS CHART — TYPES AND LEVELS**

The Master Account Holder is able to adjust the access levels of any individuals that have access to their account(s)

There is only one Master Account Holder granted per taxpayer. This logon has the ability to manage access of all other logons for the taxpayer's account(s), close account, and manage bank information for direct deposit refunds. The first login for the taxpayer is by default the Master Account Holder for the taxpayer. Any subsequent logon established under the same FEIN or SSN will be considered an Account Manager.

<table>
<thead>
<tr>
<th>Customer Level - Access Type</th>
<th>Master</th>
<th>Account Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add or Edit Taxpayer DBA Name</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Add or Edit Taxpayer Mailing Address</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>My Profile</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Cancel My Online Access</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Change Password</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Manage Logons</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Add Access to Another Account</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Establish Refund Direct Deposit</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>View and Print Letters/Permits</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Request to Close a Tax Account</td>
<td>Y</td>
<td>N</td>
</tr>
</tbody>
</table>

OkTAP has three access levels: View, File, and All Access. The Master Account Holder controls the access level for all other logons. The access level for a login can be set independently for each tax account for which access has been granted to a logon. The Default Access Level is File (This can be changed in Manage Logons – see page 17)

<table>
<thead>
<tr>
<th>Account Level - Access Level</th>
<th>All Access</th>
<th>File</th>
<th>View</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add or Edit Account DBA Name</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Add or Edit Account Mailing Address</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Letters / Permits</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>My Notices</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Messages from the OTC</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Send Messages to the OTC</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Requests</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>View Returns</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>File and Amend Returns</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Pay / Make a Payment</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Submit Attachments</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>Order Cigarette stamps (Cigarette accounts)</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td></td>
</tr>
</tbody>
</table>
Close Account – this hyperlink gives you the option to request to close your Oklahoma Tax Account. From the Account Summary Screen, click the Close Account hyperlink. Fill in the date of closure, the reason for closing your account. If you sold your business, include the name of buyer.

You will also need to send your tax permit for that account to the Oklahoma Tax Commission. Once you have filled in the required information, click the Submit button.

OkTAP will ask to enter in your account password, then click OK.
Submit Attachment – You can attach a word or spreadsheet document to your account, the attachment can not be larger than 30 (MB)

Fill in the month and year of the associated filing period, and click the Add Attachment hyperlink to choose a file.

Type a short description of the file, then click your browser button to open up your directories. Once the file is selected, click the save button to attach the document/spreadsheet.
Make A Payment – Will take you to our sister website for you to make any payments.

Click the “Click here to proceed to OK.gov” hyperlink

Refund Deposit – To have refunds directly deposited into a bank account, the Master Logon will need to enable this feature for a tax account. To have refunds direct deposited into a bank account, identify the account type you wish to have refunds deposited into - checking or savings. Enter the routing number of the financial institution and your account number. Once done click the Submit button.
WITHHOLDING REGISTRATION APPLICATION

To apply to register a withholding account on TAP you will need the following information:

- Valid email to register
- Ownership information
- Physical address of the business
- Dates of operations for the business

Getting Started
The Withholding Application link on the OTC webpage brings you to this screen:

From here the withholding application process is a straight-forward, top-down procedure guided by section hyperlinks that open information panels. Note the Submit and Cancel buttons at the top and bottom of the page. If you wish to cancel the application process, click on the Cancel button at any time. Upon completion of your application, you will be directed to click on the Submit button to finalize the application. Read all directions carefully and be aware of hyperlinks and small question marks that can assist you in the application process.
1. Click on the **Part 1 of 4 – Enter Account Information** hyperlink to bring up the Account Information panel.

Inside the **Account Information panel**, all yellow fields are required. If a field turns red it is in error and must be corrected before moving on. Note the small blue question mark next to the “Are you an out of state entity?” check box. These blue question marks appear throughout the application process. Click on the blue question mark to bring up additional information regarding that step. The type of account you select from the drop-down menu will activate different options later in the process, so make sure all the information is correct. Complete all required fields and click on the **OK button**.

This completes Part 1 of 4 and returns you to the home screen. Note the hyperlink for part 2 is now activated.
2. Click on the text hyperlink to begin **Part 2 of 4 – Enter Contact Information.**

This hyperlink brings up the **Business Contact Information panel.** Complete all required fields and click on the **OK button.** Clicking in the “Are you a payroll company?” check-box opens additional fields regarding payroll company information. If you are part of a company which provides payroll services you will need to complete both sections of this panel. The expanded Payroll Company Information section is shown below.

Complete all required fields and click on the **OK button.** This completes part 2 and returns you to the home screen.
3. Enter Ownership Information
   A. Click on the text hyperlink for **Part 3 of 4 – Enter Ownership Information** to being.

This hyperlink brings up the **Ownership Information panel**. Complete all required fields and click on the **OK button**.

This completes part 3 and returns you to the home screen. Note that the **Enter mailing address** hyperlink now appears.
B. Click on the **Enter mailing address** hyperlink to open the **Mailing Address** panel.

You may use the **USPS Website** hyperlink in the top-right corner to find the last 4 digits of your zip code for faster processing. Complete all required fields and click on the **OK button**. If your physical address is different from your mailing address you will need to repeat the steps for that portion of the process as well. If not, click the **Same as mailing address** check box to move on to the next section of the application.

This completes the mailing address portion and returns you to the home screen where the **Search for code (NAICS)** hyperlink appears.
C. Click the **Search for your principle products or services code (NAICS)** hyperlink to begin the search process.

This hyperlink brings up the Industry Code Lookup panel. Complete all required fields to generate product code. If you need more information on NAICS codes, click on the blue question mark to bring up an information box.
Use the **Keyword** box to search for the product code that best fits your company. Type a word or words that best describe your business and hit enter. To learn more about a particular NAICS code, click the **Details** hyperlink on the right side of the Code window. These boxes will provide additional information and help you determine the correct NAICS code. To select your NAICS code, click on the **NAICS code number** hyperlink in the left column of the row that best describes your business.

<table>
<thead>
<tr>
<th>Code</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>111419</td>
<td>Other Food Crops Grown Under Cover CAN</td>
</tr>
<tr>
<td>236210</td>
<td>Industrial Building Construction CAN</td>
</tr>
<tr>
<td>238290</td>
<td>Other Building Equipment Contractors MEX</td>
</tr>
<tr>
<td>311111</td>
<td>Dog and Cat Food Manufacturing CAN</td>
</tr>
<tr>
<td>311119</td>
<td>Other Animal Food Manufacturing CAN</td>
</tr>
<tr>
<td>311211</td>
<td>Flour Milling CAN</td>
</tr>
<tr>
<td>311230</td>
<td>Breakfast Cereal Manufacturing</td>
</tr>
<tr>
<td>311412</td>
<td>Frozen Specialty Food Manufacturing MEX</td>
</tr>
<tr>
<td>311422</td>
<td>Specialty Canning US</td>
</tr>
<tr>
<td>311423</td>
<td>Dried and Dehydrated Food Manufacturing US</td>
</tr>
<tr>
<td>311514</td>
<td>Dry, Condensed, and Evaporated Dairy Product Manufacturing US</td>
</tr>
<tr>
<td>311612</td>
<td>Meat Processed from Carcasses US</td>
</tr>
<tr>
<td>311615</td>
<td>Poultry Processing CAN</td>
</tr>
<tr>
<td>311711</td>
<td>Seafood Canning US</td>
</tr>
<tr>
<td>311712</td>
<td>Fresh and Frozen Seafood Processing US</td>
</tr>
</tbody>
</table>

Clicking on the **NAICS code number** hyperlink will return you to the home screen with the correct NAICS number and description filled-in. Once the code is entered, the next section is activated.
D. Click on the Enter owner/responsible party information hyperlink to open the owner/officer information panel.
Note the owner/officer information panel is tabbed. If you have additional owners/officers to enter, click on the **Add a Record** text to open up another tab. Repeat this process for all owners/officers. If additional records are opened unintentionally, use the **Delete this Record** hyperlink to remove errant records. Once all responsible parties are added, click on the **OK** button.

Completing the officer information returns you to the home screen where the **Wage Withholding Tax** section is now activated.
E. In the **Wage Withholding Tax** section, use the check boxes on the right to complete this portion of the form. All boxes are required (yellow) and must be completed to move on.

Once finished, the final section will appear: Part 4 of 4 – Electronic Signature.
4. To complete the application process, read the Electronic Signature statement and click the “I agree to this” check box to signify that this form is accurate and complete.
Note that Submit and Cancel tabs now appear at the top of the page. If your screen resolution is set to the point that the side scroll function is activated, the Submit and Cancel tabs will appear both at the top and bottom of the screen for convenience.

5. Once finished you will be taken to the CONFIRMATION screen. Use the Print button at the top of the page to print a copy of your confirmation which includes the application date and confirmation number. This number can be used to look-up the application if the taxpayer has a question.

Once the application is complete click on the **Ok button**. You will receive email confirmation of your registration after your application is processed. The email will contain your OTC account number and instruction for tax remittance. Please allow five business days for processing.