

Ohio Business Gateway

Using the Gateway as a Service
Provider: Granting or Denying
Business Account Role Requests

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Introduction

Being a Service Provider in the modernized Gateway is as easy as ever. In fact, there is no functional difference between Service Provider and other business accounts. That means that there are no additional steps or designations needed to register and use the Gateway as a Service Provider.

This guide describes user roles and permissions in the Gateway and demonstrates how Service Providers can manage their employees' and other individuals' access to Gateway business accounts, including granting or denying business account role requests.



Note: Business account and Service Area access and permissions were migrated from the previous Ohio Business Gateway system (also referred to as the OBG or Gateway 2.0) to the modernized Gateway. Service Providers who had permission/access to file transactions on behalf of client businesses in the previous Gateway system automatically retained that access. Service Providers only need to follow the instructions in this guide when requesting access to file on behalf of a business account that they were not associated with in the previous Gateway system.

User Roles and Permissions

Before an individual can access a business' Gateway account or file on behalf of a business, they will need to 1) request a role on the business account and 2) request access to specific Service Areas or transactions.

There are three business account roles in the Gateway:

- A **Non-Filer** is any direct contact (employee) or related contact (Service Provider) who cannot file transactions on behalf of the business or manage the business account's security. Non-Filers could potentially access other areas of the Gateway, such as Helpful Content and help cases.
- A **Filer** is any direct contact (employee) or related contact (Service Provider) who can file transactions on behalf of the business, but who does not have access to manage the account security (for example, grant other users permissions to see, create, edit or submit transactions) on behalf of the business. Transaction-level permission to file must also be granted in order for a Filer to file a transaction.
- A **Filing Administrator** is any direct contact (employee) or related contact (Service Provider) who has access to manage account security on behalf of the business. Transaction-level permission to file must also be granted in order for a Filer to file a transaction.

In addition, there are three transaction-level permissions in the Gateway:

- Read, Create, Edit, Delete, File permissions allow the business user to access all transaction functionality for any transaction they have access to.
- **Read, Create, Edit** permissions allows the business user to view an in-progress or completed transaction, edit an in-progress transaction and start a new one. However, the business user with this level of permissions cannot file or pay for the transaction or delete an in-progress or completed transaction
- **Read-Only** permission allows the business user to view an in-progress and completed transaction. However, the business user cannot file the transaction, delete an in-progress or completed transaction, edit an in-progress transaction or start a new transaction.

Granting or Denying Business Account Role Requests

Filing Administrators are the only individuals who can approve or deny business account role requests. Therefore, after an individual requests a role on a business account, a Filing Administrator will need to grant the individual's request before they can access the business account.

If you are a **Filing Administrator** for a business account, follow the steps below to approve or deny role requests.

Example Scenario: Phil Filer owns a CPA firm called Pacific Blue, Inc. and is the Filing Administrator for his company's Gateway business account. This week, he hired Jane Doe and instructed her to create a Gateway account. When Jane created her Gateway account, she was required to provide the Federal Employer Identification Number (FEIN) or Social Security Number (SSN) for the company she is registering with. She provided the FEIN for Pacific Blue, Inc. and requested a Filer role. How can Phil approve Jane's request?

1. Access the Account Access Management Page

Make sure the name of the appropriate business account is selected from the business account dropdown in the top left corner of the Gateway. Navigate to your **Account Access Management** page by clicking on the "Lock" button in the top right-hand corner of the Gateway.

Note: If you are not a Filing Administrator on the business account, the "Lock" button will not be visible.

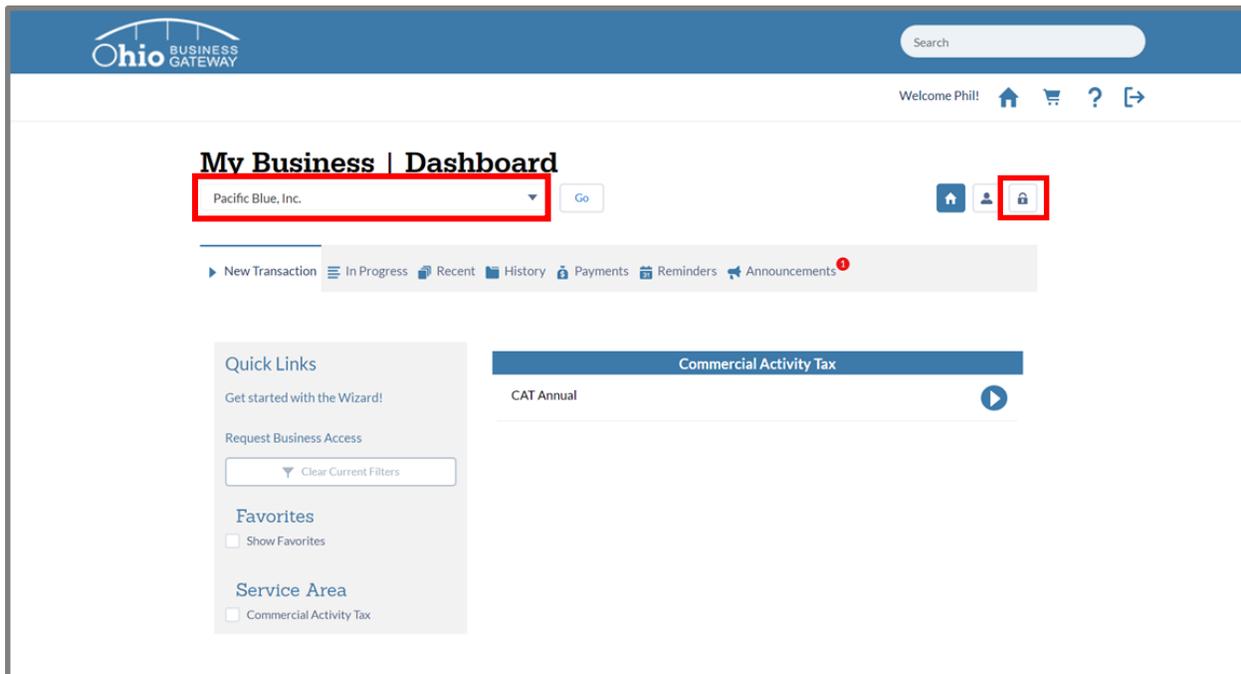


Figure 1 Account Access Management Page

2. Navigate to the Account Access Requests Tab

Click on the **Account Access Requests** tab to view the names of individuals who have submitted requests to access the business account.

In the *Requests for Account Access* table, you can see the name of individuals who have requested a role on the business account, the name of the business with which they are already associated, if applicable, and the type of role they are requesting.

Note: Only role requests for the business selected in the business account dropdown in the top left corner of the Gateway will be displayed. If your business name is displayed, you will see individuals requesting a role on your business account. If a client's business name is displayed, you will see individuals requesting a role on their business account.

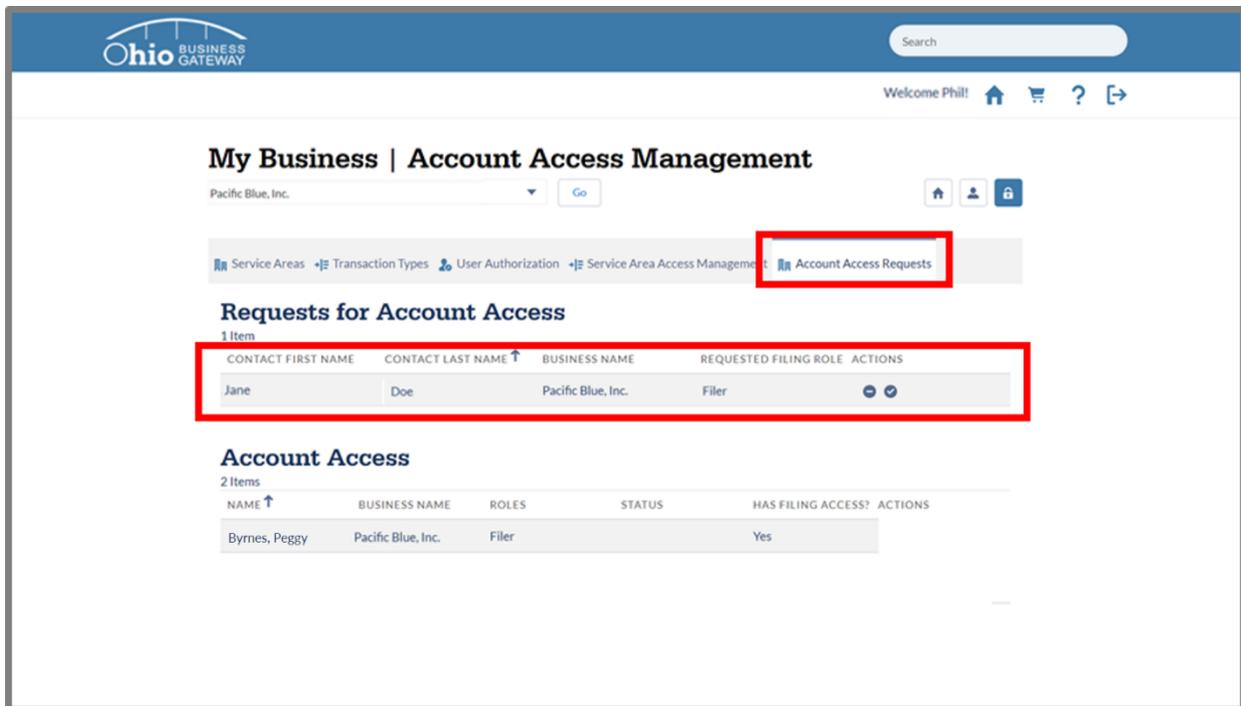


Figure 2 Account Access Requests tab on the Account Access Management page

3. Approve or Deny Account Access Requests

Use the buttons under the “Actions” column in the *Requests for Account Access* table to approve or deny business account role requests. Click the “-” icon to deny a request to for a role on the business account. Click the “✓” icon to approve a business account role request.

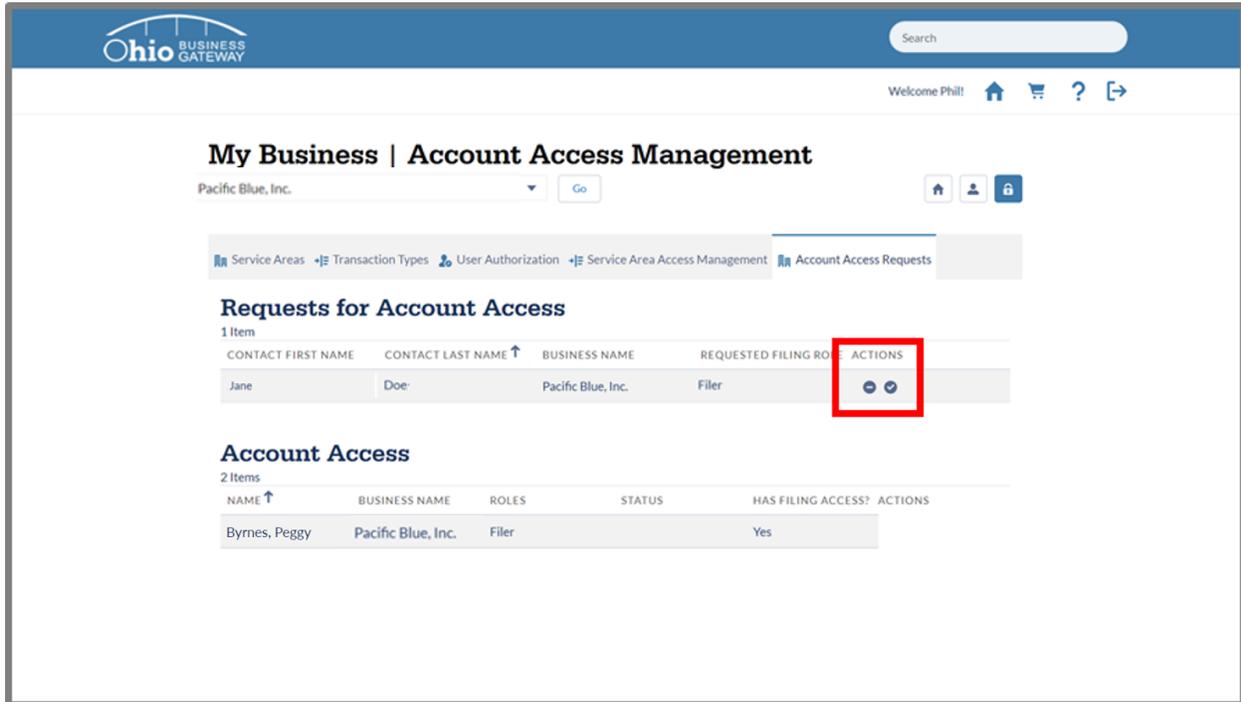


Figure 3 Approve or Deny Access Requests Using “-” and “✓” icons

Confirm that you would like to grant the individual the specific type of role they requested by clicking on the “Confirm” button.

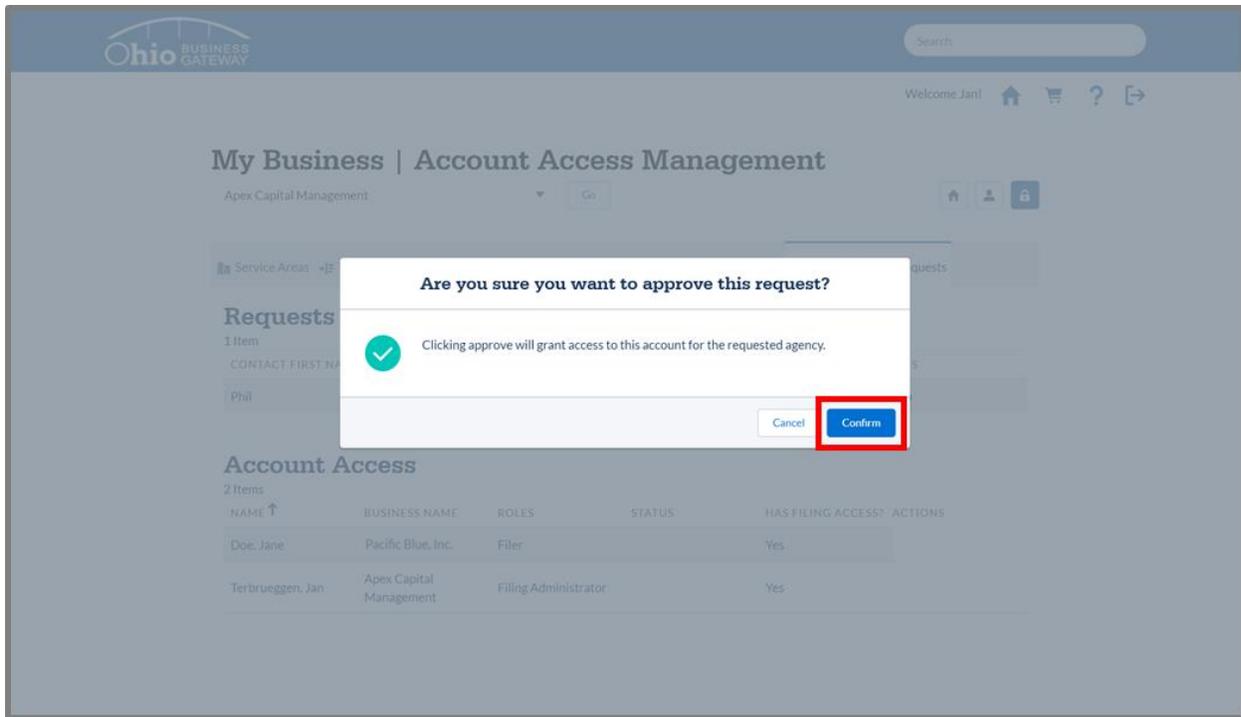


Figure 4 Confirm Account Access Request Approval

This completes the process for approving or denying an individual's role request on a Gateway business account. Once the individual is approved, they will receive an email confirmation.