

New Mexico Taxation & Revenue Department To Roll Out New CRS E-Filing System

New Mexico Taxation and Revenue Secretary Demesia Padilla announced that the Department will be implementing a new E-filing system for CRS starting June 16, 2014. This next generation of E-filing system called the Taxpayer Access Point (TAP) is your one-stop shop online tax center.

“TAP offers several key enhanced features that allow taxpayers and tax preparers to more efficiently manage their CRS accounts,” said Demesia Padilla, Cabinet Secretary for the New Mexico Taxation and Revenue Department. “With added security features, TAP also makes available much-needed information in a timely fashion, enabling CRS taxpayers to make important business and tax decisions.”

All CRS taxpayers who file electronically, whether by choice or mandate, must use TAP to file CRS-1 Forms and make payments.

The New Mexico e-Filing Services login and password used in the previous system will not work in TAP. The first step is to sign your business up for a TAP account at <https://tap.state.nm.us> by selecting the “Sign Up – Business” link. Step by step instructions are provided on the website. The website also provides “How-To Videos” under the Help menu option.

Benefits of TAP:

- Forecast future balances for your tax accounts
- Store your bank account information for future use
- Taxpayers will be able to setup recurring payments for delinquent liabilities and estimated payments.
- View filing history and print past returns
- Upload attachments for income tax returns
- View letters and emails sent by TRD
- Update information on your tax accounts such as name, DBA, and mailing address.
- Without logging into TAP individuals can submit payments, tax returns, check the status of their refunds, and apply for certain tax credits.
- Without logging into TAP businesses can submit payments, register a CRS account, check the status of their CRS account, view CRS location rates, and apply for certain business tax credits.
- Obtain Non-Taxable Transaction Certificates (NTTCS)

Full services to file, pay, and view are available for the following taxes:

- Combined Fuel Tax
- Combined Reporting System (CRS)
- International Fuel Tax (IFTA)
- International Registration Plan (IRP)
- Oil and Gas Proceeds
- Pass Through Withholding
- Personal Income Tax
- Weight Distance Tax and Permits
- Workers' Compensation Tax

TAP will accept credit card payments for additional account types:

- Alternative Fuels Excise Tax
- Bingo and Raffle Tax
- Cigarette Tax
- Combined Fuel Tax
- Combined Reporting System
- Conservation Tax
- E911 Services Surcharge
- Fiduciary Income Tax
- Gaming MFG and Distributor Tax
- Gaming Operator Tax
- Liquor Excise Tax
- Local Liquor Excise Tax
- OGP Remitter
- PTW Remitter
- Railroad Car Company Tax
- Resource Excise Tax
- Severance Tax
- Telecom. Relay Srv Surcharge
- Tobacco Products Tax
- Water Conservation Fee

Limited services to pay and view for the following taxes:

- Alternative Fuels Excise Tax
- Bingo and Raffle Tax

- Cigarette Tax
- Conservation Tax
- Corporate Income Tax
- E911 Services Surcharge
- Fiduciary Income Tax
- Gaming MFG and Distributor Tax
- Gaming Operator Tax
- Liquor Excise Tax
- Local Liquor Excise Tax
- Railroad Car Company Tax
- Resource Excise Tax
- Severance Tax
- Telecom Relay Service Surcharge
- Tobacco Products Tax
- Water Conservation Fee

New Mexico Taxation & Revenue Department Upgrades CRS Online Filing System

The New Mexico Taxation and Revenue Department has a new CRS e-filing system, Taxpayer Access Point (TAP), your online tax center. This system will become effective during the 2nd quarter of 2014.

- **How does this affect me?**

1. New Mexico e-Filing Services will no longer be available to file and pay tax returns.
2. Effective 2nd quarter of 2014, you must use TAP at <https://tap.state.nm.us> to file and pay.
3. If this is your first time using TAP you must:
 - Sign up your business for a TAP account by going to <https://tap.state.nm.us> and clicking on the [Sign Up – Business](#) link under the **SIGN UP FOR TAP** section. Note: this is your business TAP account; it is NOT your clients account.
 - After signing up for a TAP account, log into TAP using your TAP Username, Password, and Authorization Code received at sign-up.
 - **To file online:** Click on the [Account ID](#) link and then click the [File Now](#) link to file your return.
 - After submitting your return, click the **Make a Payment** button at the top right corner of the page.
 - **To bulk file:** Click on the [Upload XML Bulk File](#) link under the **I WANT TO...** section in the upper right corner of the page.
 - Click the **Add** link in the left sidebar to attach your XML file. Only files that pass validation will attach.
 - If you do not wish to submit the attached file, delete it by clicking on the red X next to the attachment in the left sidebar.

- **How is this different than before?**

1. Your New Mexico e-Filing Services **Login Name and Password will NOT work in TAP**. You must sign up for a TAP account to file and pay.
2. The new URL to file and pay is: <https://tap.state.nm.us>
3. Bulk file schemas are being updated to support the TAP system. The new draft schema is available at <https://tap.state.nm.us>.
 - Click on the **FAQs/Contact Us** link under **Help** section on the left sidebar of the TAP logon page.
 - Click on the **BULK** tab. This is a list of FAQs about bulk filing in TAP.
 - Click on question **Q11**, “Where do I find preliminary schema files for tax programs migrating into TAP in the near future?”

- **How do I get assistance?**

1. Watch the “How-To” videos listed below by clicking on the **How-To Videos** link under **Help** on the left sidebar of the TAP logon page at <https://tap.state.nm.us>
 - Signing Up for TAP – details the process of signing up for a TAP account
 - Navigating in TAP – demonstrates how to navigate through TAP
2. Click on the **FAQs/Contact Us** link under at <https://tap.state.nm.us>, and then click on the **BULK** tab for answers to frequently asked questions about bulk filing in TAP.
3. Email TRD-CustomerAssistance@state.nm.us

Third Party Filer

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Am I a Third Party Filer?

You are a Third Party Filer if you manage aspects of a tax account on behalf of another individual or business. This includes filing a return and/or making a payment.

How do I set up a Third Party Filer login to TAP?

1. Click the [Sign Up – Business](#) link on the TAP Home screen.
2. Complete the Contact Information section with the information for your business.
3. Complete the Login Information section and the Password Recovery section; Click the **Next** button.
4. Click the radio button for the type of account access (Myself, Someone Else, Both) you want to gain.
5. Enter the FEIN or SSN for your business.
6. Complete the Online Access section to verify your identify; Click the **Next** button.
7. Review the Summary information; Click the *Electronic Signature* check box and choose a notification option for the authorization code.
8. Click the **Submit** button. You will receive a confirmation number for the request. You will receive an authorization code at the email or text you entered; you need the authorization code to login the first time.

When do I add access to an account?

You can add third party access to an account when the account owner has provided you with permission to manage their account. When you have added access to the account you can manage all aspects of the customer's tax account including filing taxes and making payments.

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How do I add access to another taxpayer's account?

1. Log into TAP.
2. Click the **Manage My Access** header link.
3. Click the [Access Another Account](#) link within the I Want To... menu.
4. Select the Account Type from the drop-down menu; Click the **Next** button.
5. Choose the ID Type from the drop-down menu; Enter the ID.
6. Complete the Account Access Verification section; click the **Next** button
7. Click the **Submit** button to complete your request.
 - ✓ Third party access to the account is automatically added once the request is submitted.
 - ✓ Third Party logins are given the default access level specified by the Administrator in the **Settings** tab. The default access level is usually File & Pay unless the Administrator has designated a different access level.
8. Click the **TAP Home** button on the left sidebar.
 - ✓ The third party's account is now listed in the **Other Taxpayer's Accounts** sub-tab.

I have added access to an account, how do I file a return?

1. Log into TAP.
2. Click on the [Account Id](#) link within the **Accounts** tab.
3. Click the [File Now](#) link for the period you wish to file for.
4. Complete the return; click the **Submit** button.

How do I give someone else third party access to my account?

Note: The third party's TAP username will be required.

1. Log into TAP.
2. Click the **Manage My Access** header link.
3. Click the **Manage Logins** tab and the **Access to My Accounts** sub-tab.
4. Click the **Grant Third Party Access** header link.
5. Enter the third party's TAP username.
6. Select the Account Type you want the third party to have access to; Select the access level from the drop-down menu.
 - ✓ The Third Party will have access to all accounts of this type.
7. Click the **Next** button.
8. Click the **Submit** button.

How do I add a new TAP login?

If a company who would like to add a new TAP login for an employee they can create a new login for that employee and give them access to specific accounts.

1. Log into TAP.
2. Click the **Manage My Access** header link.
3. Click the **Manage Logins** tab and the **Web Logins** sub-tab.

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4. Click the **Add Login** header link.
5. Complete the TAP Registration – New Login section with the employee’s information; click the **Next** button.
6. Review the Summary information; Click the *Electronic Signature* check box and choose a notification option for the authorization code.
7. Click the **Submit** button. You will receive a confirmation number for the request. Your employee will receive an authorization code at the email or text you entered; they need the authorization code to login the first time.
8. Click **OK** button.
9. Click the **Access to My Accounts** sub-tab.
10. Click the [None](#) Access Level link for the account you wish to give the Profile Manager (new login) access to.
11. Select an Access Level from the drop-down menu; click the *Active* check box.
12. Click the **OK** button.
 - ✓ The new login now has access to the account specified.

What do the different Access Types mean?

Each login is given an access type. The different access types available are: Administrator, Profile Manager, and Third Party.

- **Administrator** – The first login for a company who registers to use TAP is given the access type of Administrator. This login authorizes the creation of all other logins and can control access types and levels for any logins associated with the taxpayer.
- **Profile Manager** – The Profile Manager is given access to accounts specified by the Administrator. The Profile Manager cannot add new logins, change access levels for another login, or change TAP settings.
- **Third Party** – The Third Party access level is given when the Administrator has granted third party access or when a taxpayer uses the [Access Another Account](#) link to gain access to someone else’s account. Third Party logins are given the default access level specified by the Administrator in the **Settings** tab. The default access level is usually File & Pay unless the Administrator has designated a different access level for third party logins.

How do I change the Access Level for a specific TAP login?

Third Party logins are given the default access level designated by the Administrator in the **Settings** tab. Only the Administrator can change an access level of a TAP login.

1. Log into TAP.
2. Click the **Manage My Access** header link.
3. Click the **Manage Logins** tab and the **Access to My Accounts** sub-tab.
4. Click the [Access Level](#) link for the login you wish to change.
5. Select a new Access Level from the drop-down menu; Click the **OK** button.