



## 2. Navigate to the “Manage Authorized Users” page

To begin, navigate to the “Profile Information” header and select “Manage Authorized Users” from the drop-down menu.



## 3. Navigate to the “Add New Authorized User” page

Review the instructions on the page, then click “Add New Authorized User” located above the search bar.





Tax Client Authorizations

Please select the checkbox(es) in the Select All column to assign the user read-only access to the selected Tax Client. Please "Apply a Template" to assign the user All Services, All Services Except Pay or View Only access for all tax programs under the selected Tax Client. If the Tax Client is registered with multiple tax programs you can use the "Tax Program Authorizations" to limit the programs the user has access to. In order to remove access from an Authorized User, please input an End Date. This field is optional and may be filled in upon creation of the Authorized User, or only when removal is required.

Select All <input checked="" type="checkbox"/>	Tax Client Name	ID	*Start Date	End Date	Assignments <span>?</span>
<input checked="" type="checkbox"/>	HELLO SETS INC.	XX-XXX3216	31-10-2018 <input type="text"/>	DD-MM-YYYY <input type="text"/>	Authorize Manually: <input type="button" value="Tax Client Functions"/> <input type="button" value="Tax Program Authorizations"/> Or: <input type="button" value="All Services"/>

Showing 1 to 1 of 1 entries

You may return to this page to update Authorized User access at any time. Simply search or select the User ID you would like to change ([step 3](#)), make updates, and click "Save".

## 6. Confirm changes

After any changes have been made, click "Save" on the Users Detail page. You will then be directed to a confirmation page, you must click "Confirm" at the bottom of the page to save your changes.

By selecting Confirm, the business consents to the release of confidential information about their SK tax accounts to the representatives listed. It is your responsibility to update your delegated user authorizations.

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## 7. Add additional or remove existing Authorized Users (as needed)

To add additional Authorized Users, repeat the steps above.

If you need to remove access from an Authorized User, simply revisit the User Details page, click on the User ID and enter the appropriate end date for the User's access. Click "Save" to save your changes.

**Congratulations, you have now successfully added an Authorized User!**

**If you require information on other options available, please visit [SETS Learning](#).**