

Saskatchewan eTax Services (SETS) – Delegating Authorized Users Guide

The following pages outline the steps required for an Administrator to delegate Authorized User access to a tax account or Tax Client Entity in SETS.

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

Administrator: Account Administrators will have the overall access for the Tax Client Entity along with all accounts under that Tax Client Entity. There can be multiple Administrators for each Tax Client Entity. Administrators are able to add/remove/update authorized user(s) access to the Tax Client Entity or tax program(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 complete Tax Client Entity or selected tax program(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 Tax Client Entity, nor the combination of access to the Tax Client Entity or tax program(s). Each authorized user is delegated access as deemed appropriate by their Administrator(s).

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

Tax Account (or Tax Program Account): Tax accounts (also referred to as tax program accounts) are the accounts specific to the Tax Client Entity. For example, an entity may have a Provincial Sales Tax account, a Liquor Consumption tax account, etc. Each account may have a unique operating name, mailing address, licence, etc.

Tax Client Entity: The Tax Client Entity is the high level view of the tax account(s). The entity is established by the Federal Business Number or Saskatchewan ID. All tax accounts administered by the entity are linked to these identifiers and considered to be part of the Tax Client Entity.

Delegating Authorized User Access

1. Log in to SETS using an Administrator account

Prior to getting started, you must first have Administrator access to a Tax Client Entity in order to delegate Authorized User access. Please review the Linking Entity/Administrator Guide on [SETS Learning](#) for steps on completing this process, or contact your Administrator to assist you in delegating an Authorized User.

Note: The individual being set up as an Authorized User must have their own Registered User SETS account and the Administrator must know the User ID for the individual they are setting up as an Authorized User.

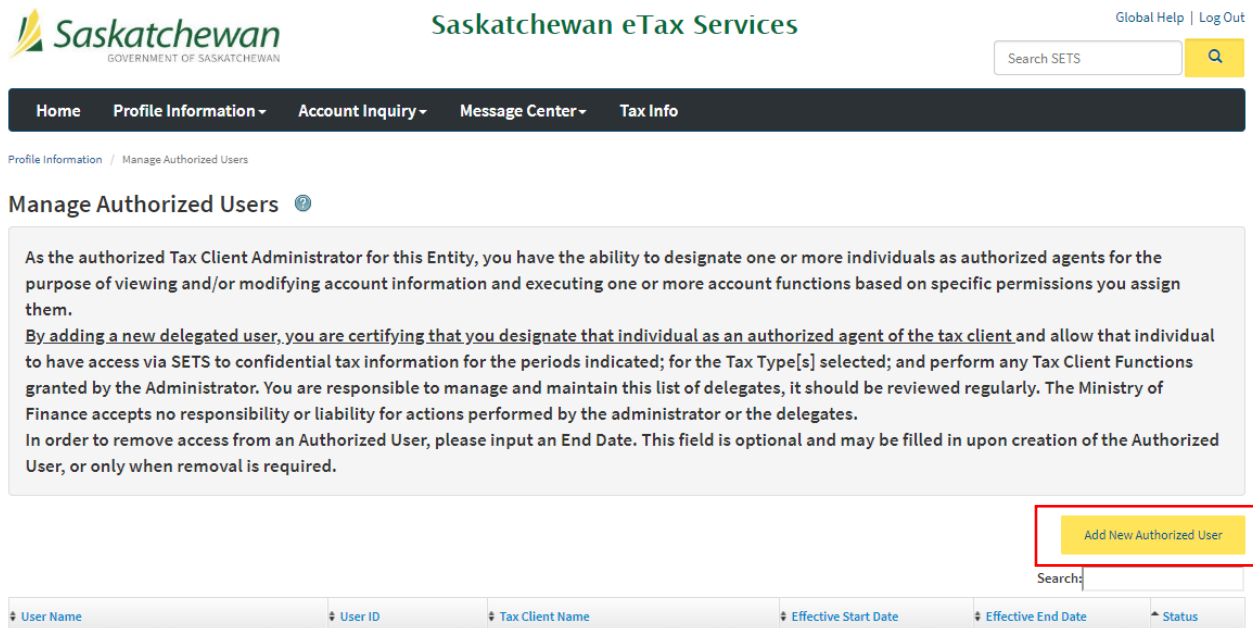
2. Navigate to the “Manage Authorized Users” page

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



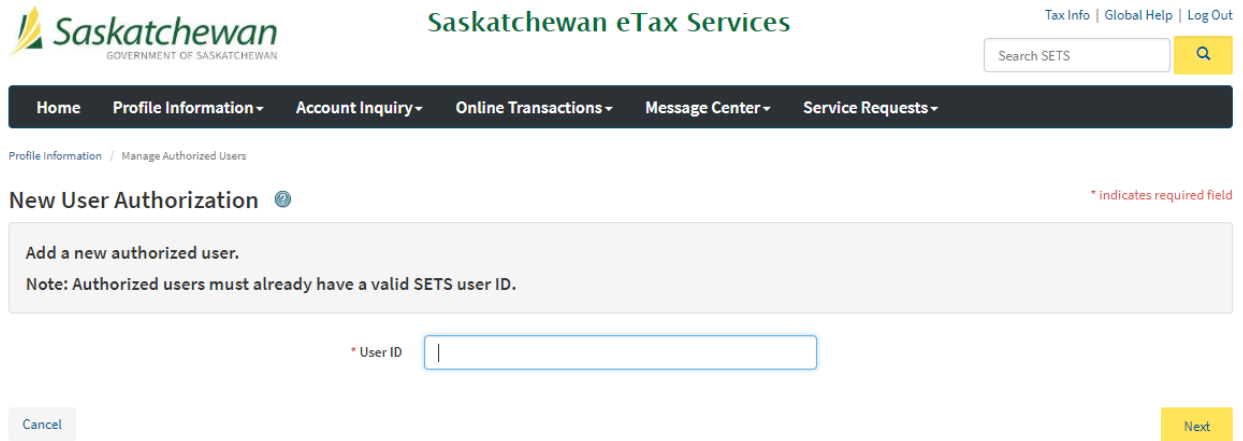
3. Navigate to the “Add New Authorized User” page

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



4. Enter User ID for new delegate

Enter the User ID of the individual you are giving Authorized User access to, then click “Next”.



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Profile Information / Manage Authorized Users

New User Authorization * indicates required field

Add a new authorized user.
Note: Authorized users must already have a valid SETS user ID.

* User ID

Cancel Next

5. Assign role(s) as required

First, confirm the correct User Information appears for the User you are giving access to.

Select the checkbox(es) on the left hand side to select which Tax Clients you would like to give access to. Then, set a start date and end date (optional).

There is an option to manually give access, or to use a “template” for standard access levels. The Ministry of Finance recommends authorizing access via a “template” as this is the simplest method.

The template options are as follows:

1. View Access Only – User will have the capability to view all information and tax programs associated with the Tax Client Entity, but will not be able to perform any functions.
2. All Services – User will have the capability to view all information and tax programs associated with the Tax Client Entity as well as the ability to perform any functions, such as filing returns and making payments.
3. All Services except Pay – User will have the capability to view all information and tax programs associated with the Tax Client Entity as well as the ability to perform functions, such as filing returns, but will be unable to make payments.

You can also manually assign functions by Tax Client Entity or by Tax Program(s). To do so, select Tax Client Functions and/or Tax Program Authorizations. Select the appropriate functions you would like to give access to and select “OK” to return to the User Detail page.

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 ?
<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](#).