

Ohio Business Gateway

Creating a New Gateway Account

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Introduction

The Ohio Business Gateway is now integrated with the State of Ohio's enterprise identity solution known as OH|ID. This step-by-step guide is meant to provide new Gateway business users with instructions about how to create an OH|ID account, how to create a Gateway business account, as well as set up a new Gateway account for transaction filing.

1. Visit gateway.ohio.gov

The first step to getting started using the Gateway is creating an OH|ID account. Visit gateway.ohio.gov and click the *Never used the Gateway? - Create an Account* hyperlink near the bottom of the login box.

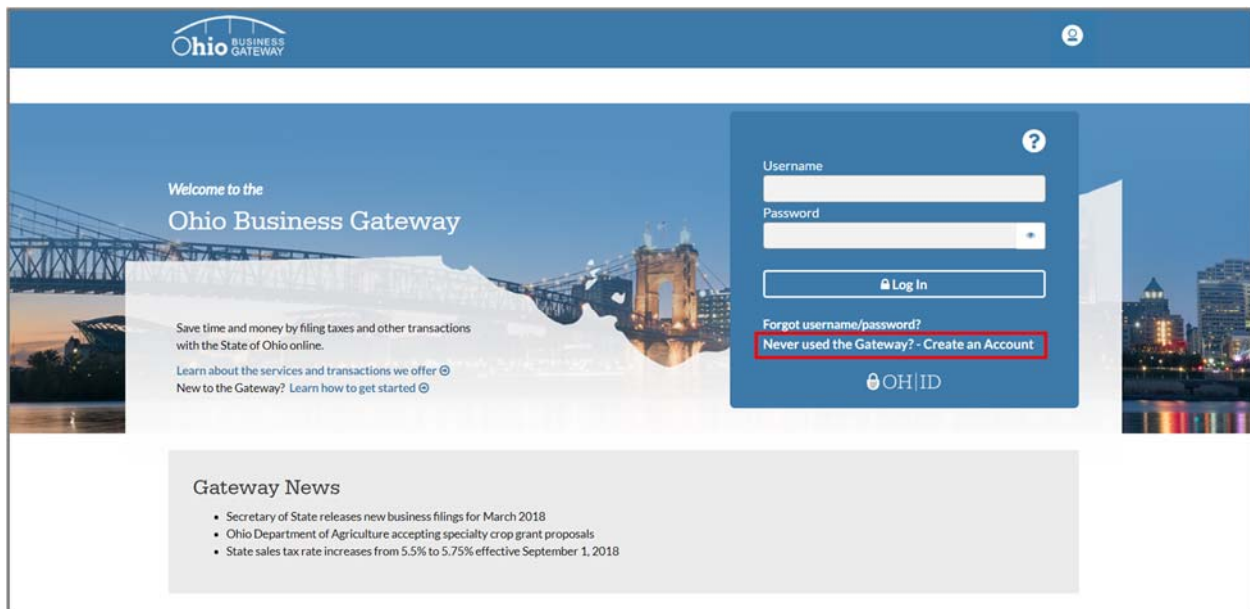
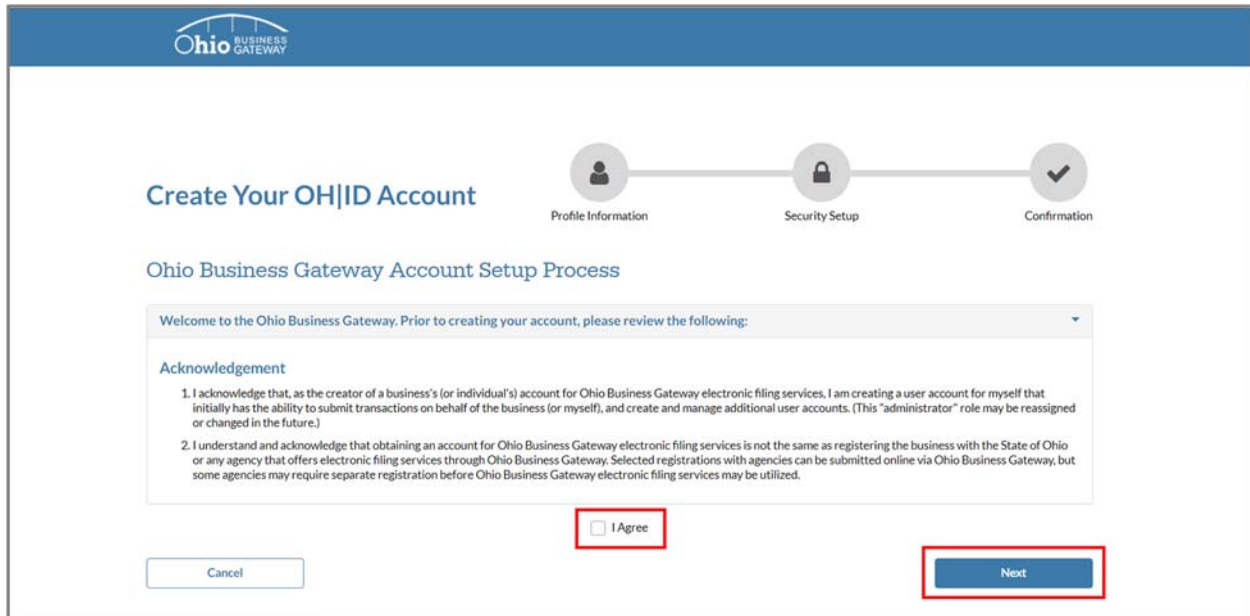


Figure 1 Gateway Login Page

2. Acknowledge Gateway Account Creation Statements

Read the statements regarding creating an Ohio Business Gateway account. Check the box next to “I Agree” if you agree with to statements and, then, click the “Next” button to continue with the account creation process.



The screenshot shows the 'Create Your OH|ID Account' page. At the top, there is a progress bar with three steps: 'Profile Information' (with a person icon), 'Security Setup' (with a lock icon), and 'Confirmation' (with a checkmark icon). Below the progress bar, the title 'Create Your OH|ID Account' is displayed. Underneath, the heading 'Ohio Business Gateway Account Setup Process' is followed by a dropdown menu containing the text: 'Welcome to the Ohio Business Gateway. Prior to creating your account, please review the following:'. Below this, the section 'Acknowledgement' contains two numbered statements. At the bottom of the page, there are three buttons: 'Cancel', 'I Agree' (with an unchecked checkbox), and 'Next'. The 'I Agree' and 'Next' buttons are highlighted with red boxes in the original image.

Create Your OH|ID Account

Profile Information Security Setup Confirmation

Ohio Business Gateway Account Setup Process

Welcome to the Ohio Business Gateway. Prior to creating your account, please review the following:

Acknowledgement

1. I acknowledge that, as the creator of a business's (or individual's) account for Ohio Business Gateway electronic filing services, I am creating a user account for myself that initially has the ability to submit transactions on behalf of the business (or myself), and create and manage additional user accounts. (This "administrator" role may be reassigned or changed in the future.)
2. I understand and acknowledge that obtaining an account for Ohio Business Gateway electronic filing services is not the same as registering the business with the State of Ohio or any agency that offers electronic filing services through Ohio Business Gateway. Selected registrations with agencies can be submitted online via Ohio Business Gateway, but some agencies may require separate registration before Ohio Business Gateway electronic filing services may be utilized.

I Agree

Cancel Next

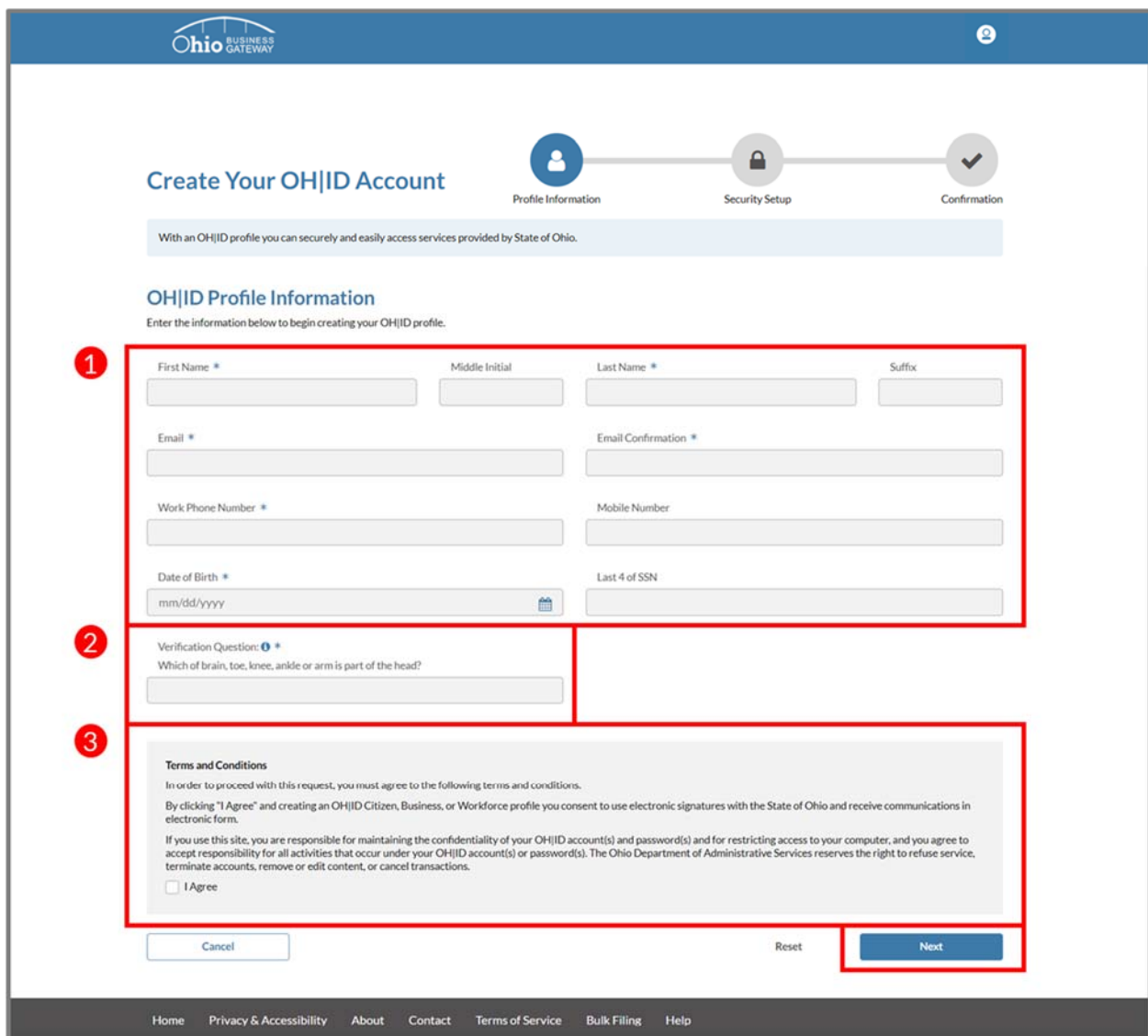
Figure 2 Ohio Business Gateway Account Setup Acknowledgement Page

3. Complete OH|ID Profile Information Page

On the OH|ID Profile Information page:

1. Enter your contact and demographic information.
2. Answer the verification question.
3. Read and accept the OH|ID terms and conditions by checking the box next to “I Agree.”

Once you have entered all the necessary information and accepted the terms and conditions, click the “Next” button to continue.



The screenshot shows the "Create Your OH|ID Account" page. At the top, there is a progress bar with three steps: "Profile Information" (active), "Security Setup", and "Confirmation". Below the progress bar, a message states: "With an OH|ID profile you can securely and easily access services provided by State of Ohio." The main heading is "OH|ID Profile Information" with a sub-heading "Enter the information below to begin creating your OH|ID profile." The form is divided into three sections, each highlighted with a red box and a red circle containing a number:

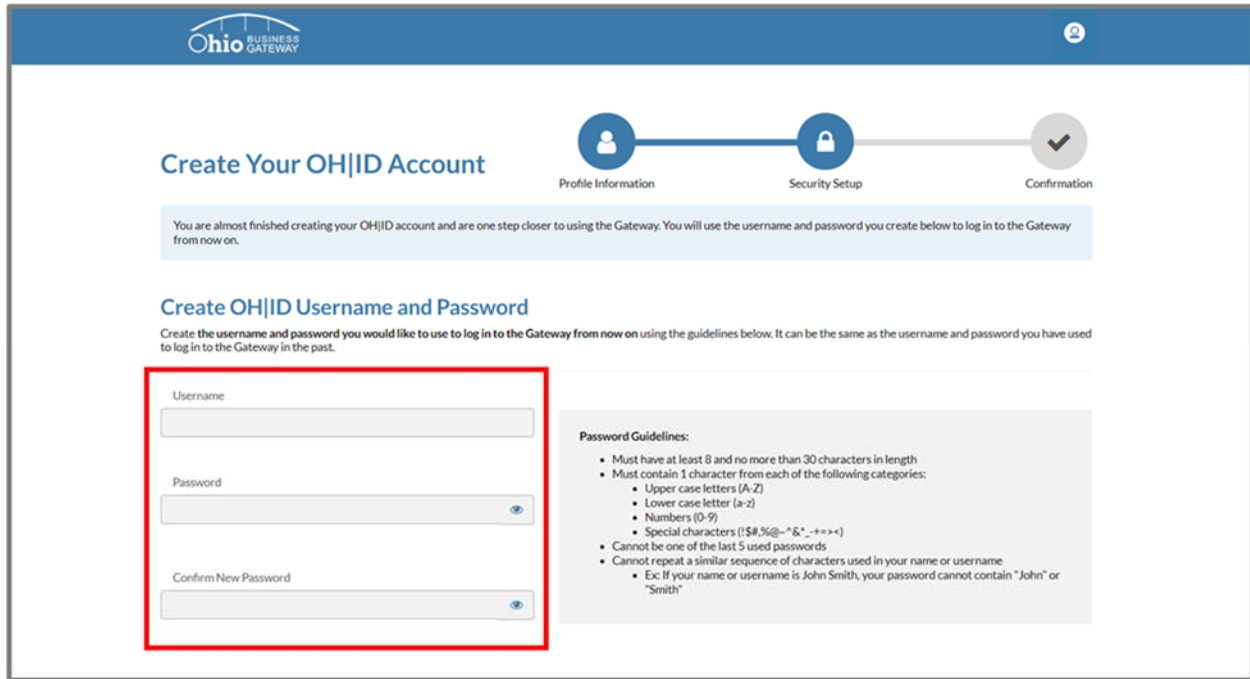
- Section 1:** Contains input fields for First Name *, Middle Initial, Last Name *, Suffix, Email *, Email Confirmation *, Work Phone Number *, Mobile Number, Date of Birth * (with a calendar icon), and Last 4 of SSN.
- Section 2:** Contains a "Verification Question" section with a question: "Which of brain, toe, knee, ankle or arm is part of the head?" and a corresponding input field.
- Section 3:** Contains the "Terms and Conditions" section, which includes a paragraph of text and a checkbox labeled "I Agree".

At the bottom of the form, there are three buttons: "Cancel", "Reset", and "Next". The "Next" button is highlighted with a red box.

Figure 3 OH|ID Profile Information Page

4. Create OH|ID Username and Password Page

On the **Create OH|ID Username and Password** page, create your OH|ID username and password following the password guidelines on the right-hand side of the page.



Create Your OH|ID Account

Profile Information Security Setup Confirmation

You are almost finished creating your OH|ID account and are one step closer to using the Gateway. You will use the username and password you create below to log in to the Gateway from now on.

Create OH|ID Username and Password

Create the username and password you would like to use to log in to the Gateway from now on using the guidelines below. It can be the same as the username and password you have used to log in to the Gateway in the past.

Username

Password

Confirm New Password

Password Guidelines:

- Must have at least 8 and no more than 30 characters in length
- Must contain 1 character from each of the following categories:
 - Upper case letters (A-Z)
 - Lower case letter (a-z)
 - Numbers (0-9)
 - Special characters (!\$%&~^&*._+=><)
- Cannot be one of the last 5 used passwords
- Cannot repeat a similar sequence of characters used in your name or username
 - Ex: If your name or username is John Smith, your password cannot contain "John" or "Smith"

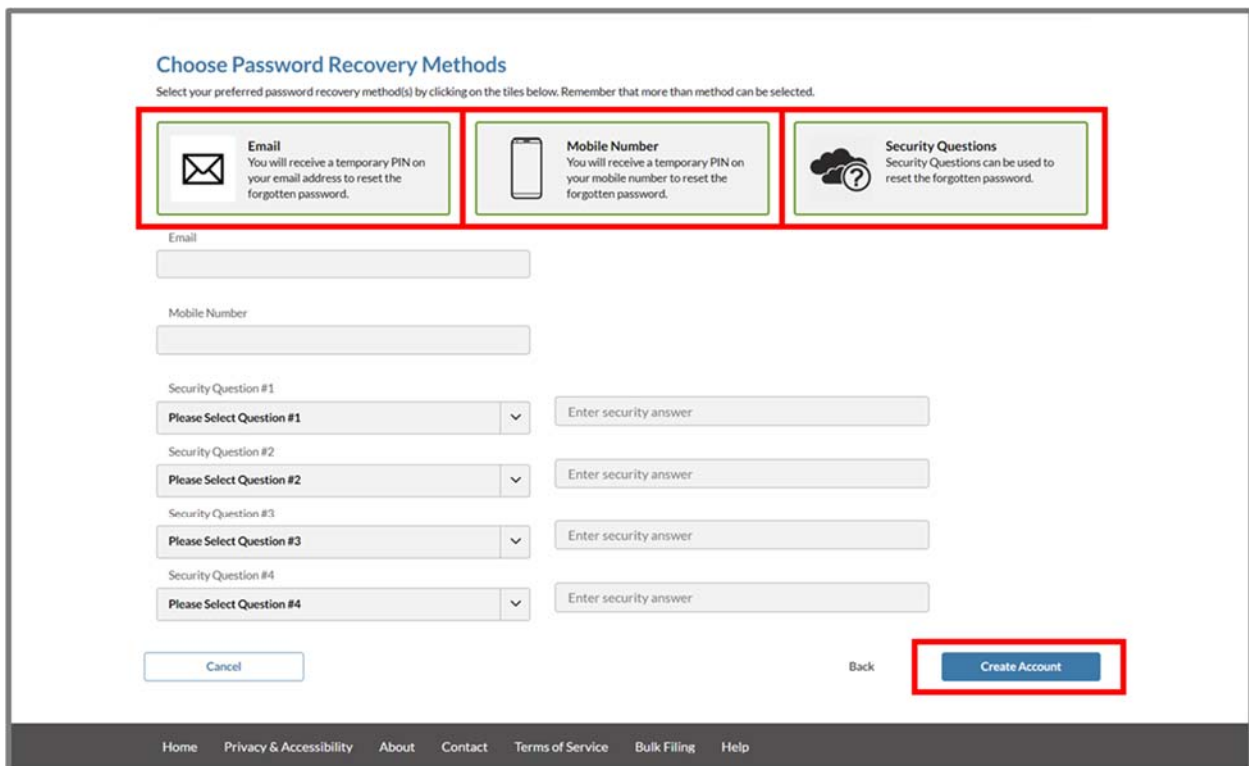
Figure 4 Create OH|ID Username and Password Page

Then, select your preferred password recovery method. The options are:

- A temporary PIN that is sent to your email address
- A temporary PIN that is sent via text message, or
- Answering pre-selected security questions.

Click on the corresponding tile under the “Choose Password Recovery Methods” header to choose your preferred option. Selecting one option is required, but selecting multiple options is encouraged to provide a more flexible password recovery experience in the future.

Once you have entered all the required information, click the “Create Account” button to continue.



The screenshot shows a web form titled "Choose Password Recovery Methods". At the top, there is a header with the title and a sub-header: "Select your preferred password recovery method(s) by clicking on the tiles below. Remember that more than method can be selected." Below this are three selectable tiles, each enclosed in a red box. The first tile is "Email" with an envelope icon and text: "You will receive a temporary PIN on your email address to reset the forgotten password." The second tile is "Mobile Number" with a smartphone icon and text: "You will receive a temporary PIN on your mobile number to reset the forgotten password." The third tile is "Security Questions" with a cloud and question mark icon and text: "Security Questions can be used to reset the forgotten password." Below the tiles are input fields for "Email", "Mobile Number", and four "Security Question" entries. Each security question entry consists of a dropdown menu labeled "Please Select Question #1" through "#4" and a corresponding "Enter security answer" text box. At the bottom left is a "Cancel" button, and at the bottom right is a "Back" label and a "Create Account" button, both highlighted with red boxes. A dark footer bar at the very bottom contains links for Home, Privacy & Accessibility, About, Contact, Terms of Service, Bulk Filing, and Help.

Figure 5 OH|ID Password Recovery Options

5. Input Validation Code (if necessary)

If you chose the “Email” or “Mobile Number” password recovery methods, a temporary PIN will be emailed or texted to you. Enter the temporary PIN and click the “Validate Code” button to confirm your selected password recovery method.

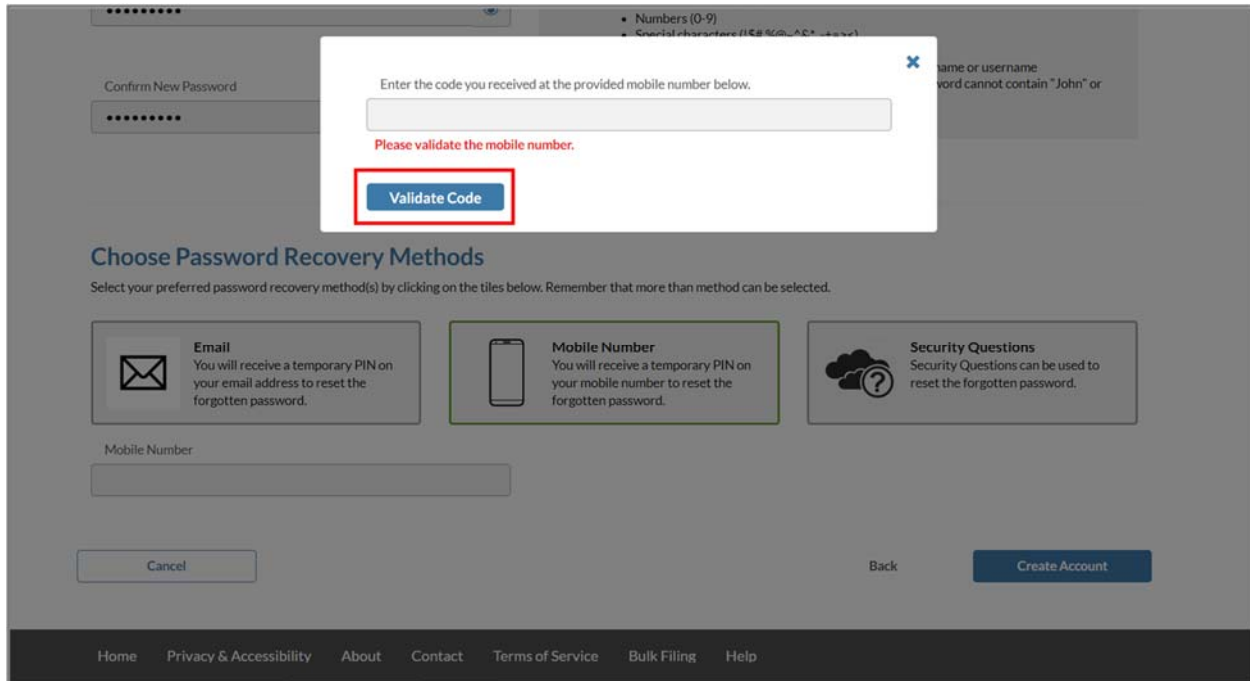


Figure 6 Validate Password Recovery Method

6. Continue to the Ohio Business Gateway

After you have successfully created your OH|ID account, click on the “Continue to the Ohio Business Gateway” button to be directed to the Gateway.

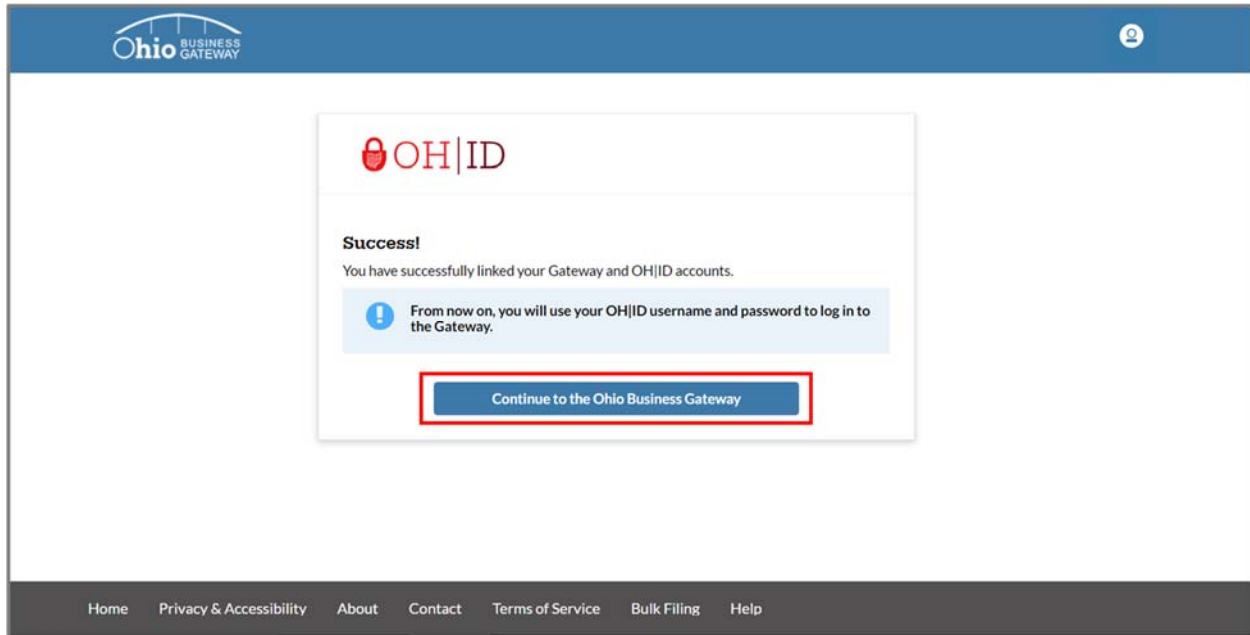
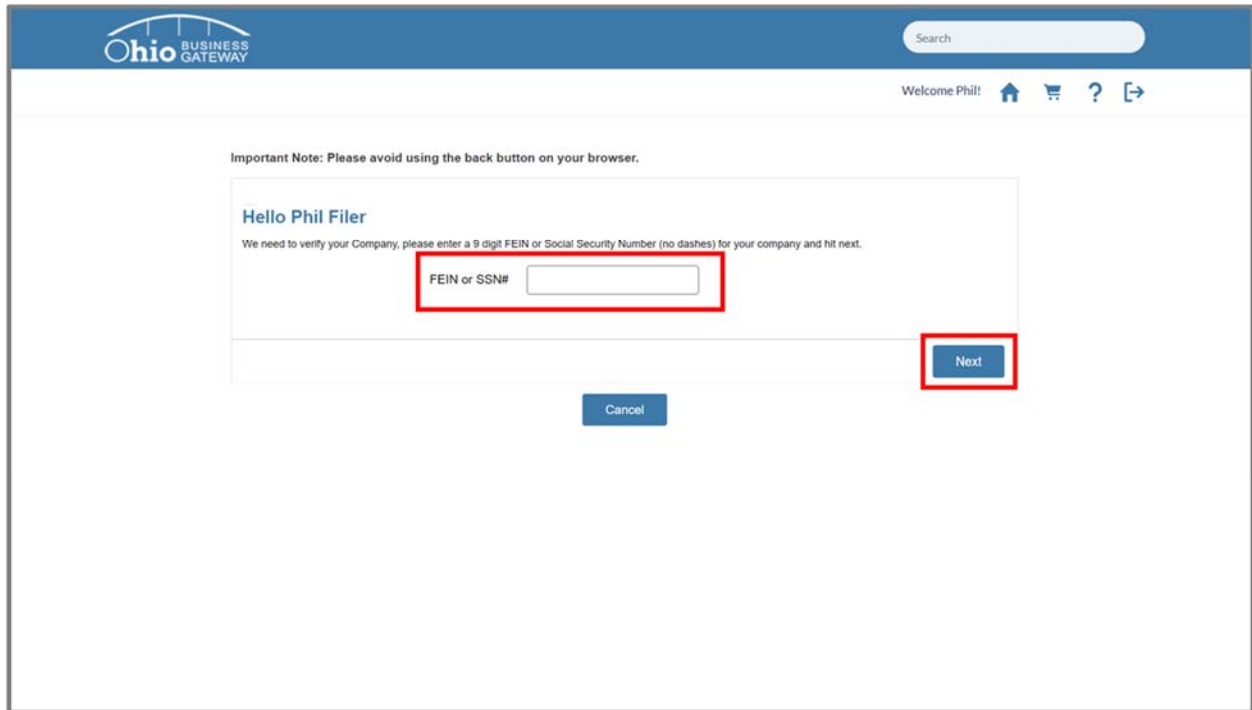


Figure 7 OH|ID Account Creation Success Page

7. Create a New Gateway Business Account

You will then begin the Gateway’s onboarding process. First, enter the Federal Employer Identification Number (FEIN) or Social Security Number associated with your business and click the “Next” button.



Ohio BUSINESS GATEWAY

Search

Welcome Phil! [Home](#) [Shopping Cart](#) [Help](#) [Logout](#)

Important Note: Please avoid using the back button on your browser.

Hello Phil Filer

We need to verify your Company, please enter a 9 digit FEIN or Social Security Number (no dashes) for your company and hit next.

FEIN or SSN#

[Next!](#)

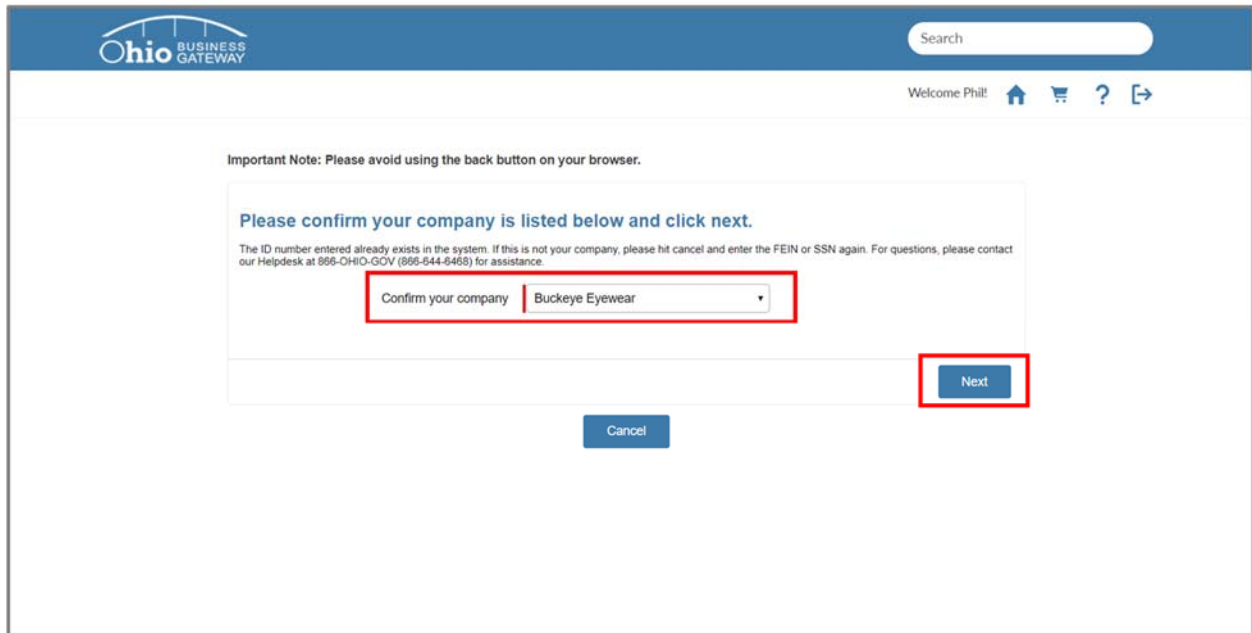
[Cancel](#)

Figure 8 Enter FEIN/SSN on Gateway Account Creation Pages

Existing Gateway Business Account

If the you enter a FEIN or Social Security Number that is already associated with a business account in the Gateway, you will be asked to confirm the business account to which you are requesting access.

After you have confirmed the name of the business account, click the “Next” button.

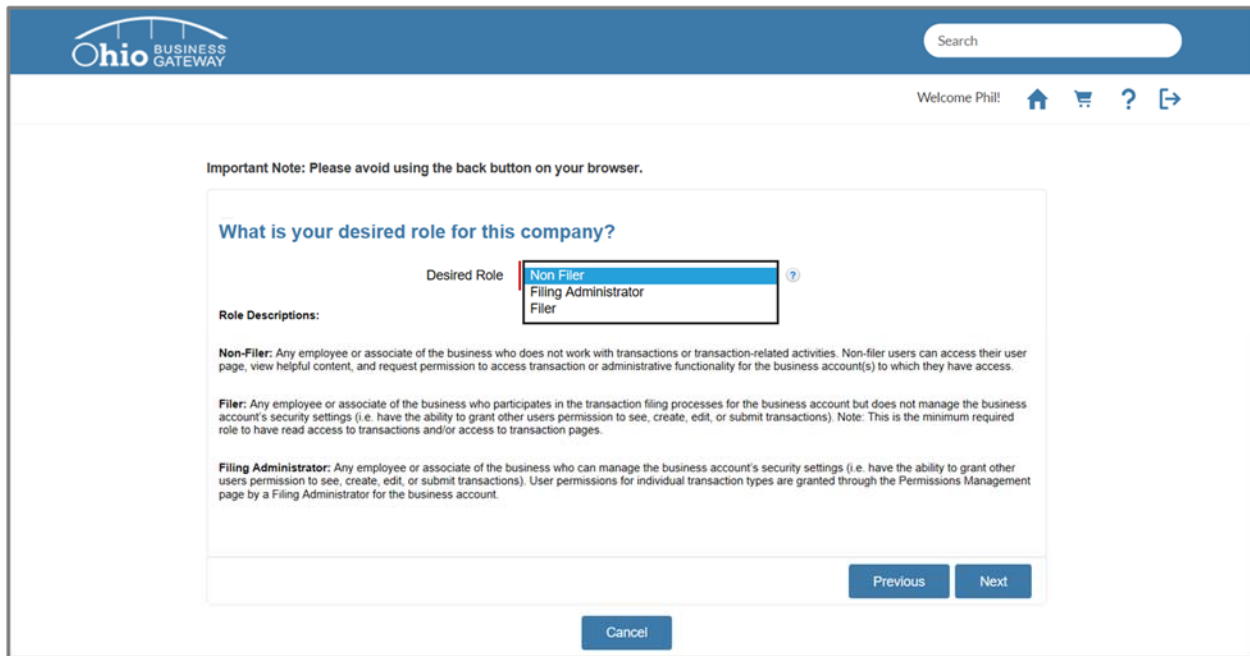


The screenshot shows the Ohio Business Gateway interface. At the top left is the logo, and at the top right is a search bar. Below the search bar, it says "Welcome Phill!" followed by navigation icons for home, shopping cart, help, and refresh. The main content area contains an "Important Note" about the back button, followed by a confirmation prompt: "Please confirm your company is listed below and click next." Below this is a sub-note about ID numbers. A dropdown menu labeled "Confirm your company" is set to "Buckeye Eyewear". A "Next" button is highlighted with a red box, and a "Cancel" button is located below it.

Figure 9 Confirm Company on Gateway Account Creation Pages

You will then be asked to select your desired role on the business account, either Non-Filer, Filer or Filing Administrator. A description of each of the roles can be found under the “Desired Role” dropdown menu.

Once you have selected your desired role on the business account, click the “Next” button.



The screenshot shows the Ohio Business Gateway interface. At the top, there is a search bar and a welcome message "Welcome Phil!". Below this, an "Important Note" states: "Please avoid using the back button on your browser." The main content area is titled "What is your desired role for this company?". It features a "Desired Role" dropdown menu with three options: "Non Filer", "Filing Administrator", and "Filer". Below the dropdown, there are "Role Descriptions" for each role. The "Non-Filer" description states: "Any employee or associate of the business who does not work with transactions or transaction-related activities. Non-filer users can access their user page, view helpful content, and request permission to access transaction or administrative functionality for the business account(s) to which they have access." The "Filer" description states: "Any employee or associate of the business who participates in the transaction filing processes for the business account but does not manage the business account's security settings (i.e. have the ability to grant other users permission to see, create, edit, or submit transactions). Note: This is the minimum required role to have read access to transactions and/or access to transaction pages." The "Filing Administrator" description states: "Any employee or associate of the business who can manage the business account's security settings (i.e. have the ability to grant other users permission to see, create, edit, or submit transactions). User permissions for individual transaction types are granted through the Permissions Management page by a Filing Administrator for the business account." At the bottom of the form, there are three buttons: "Previous", "Next", and "Cancel".

Figure 10 Select Role on Gateway Account Creation Pages

You are then taken to a page that informs you that your request for access to the business account has been submitted and that you will be notified once the Filing Administrator on the business account approves your access request.

You will then click the “Finish” button to be taken to your **Business Dashboard**.

You will not be able to access any information related to the business account until the Filing Administrator on the business account has approved your access request.

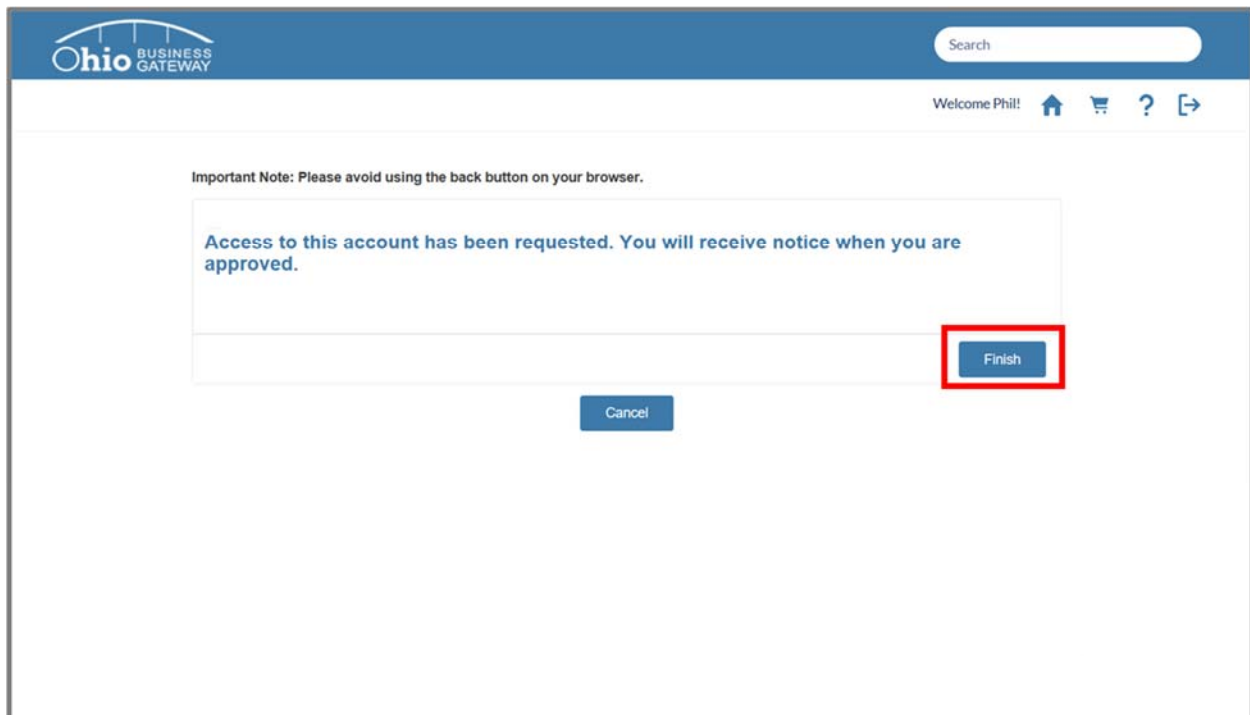


Figure 11 Access Requested Page on the Gateway Account Creation Pages

No Existing Gateway Business Account

If there is no existing Gateway business account associated with the FEIN or Social Security Number you entered, you must select whether you entered a FEIN or a Social Security Number using the dropdown menu. Then click the “Next” button.

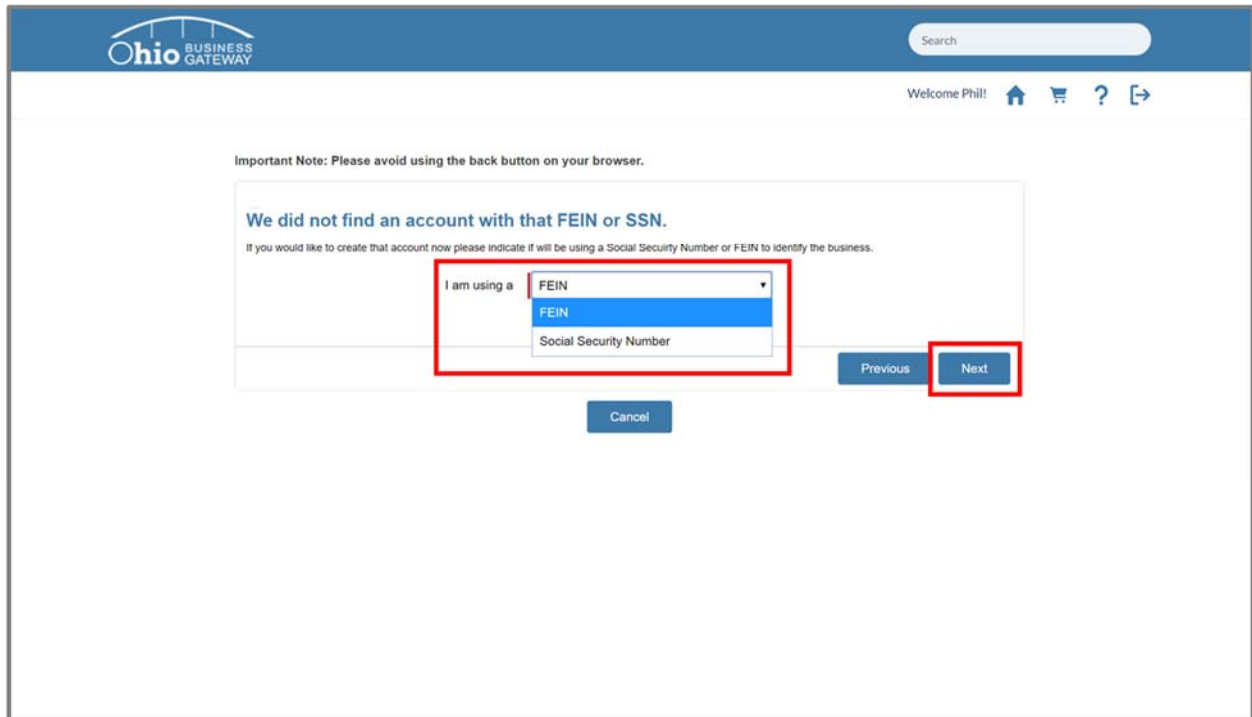
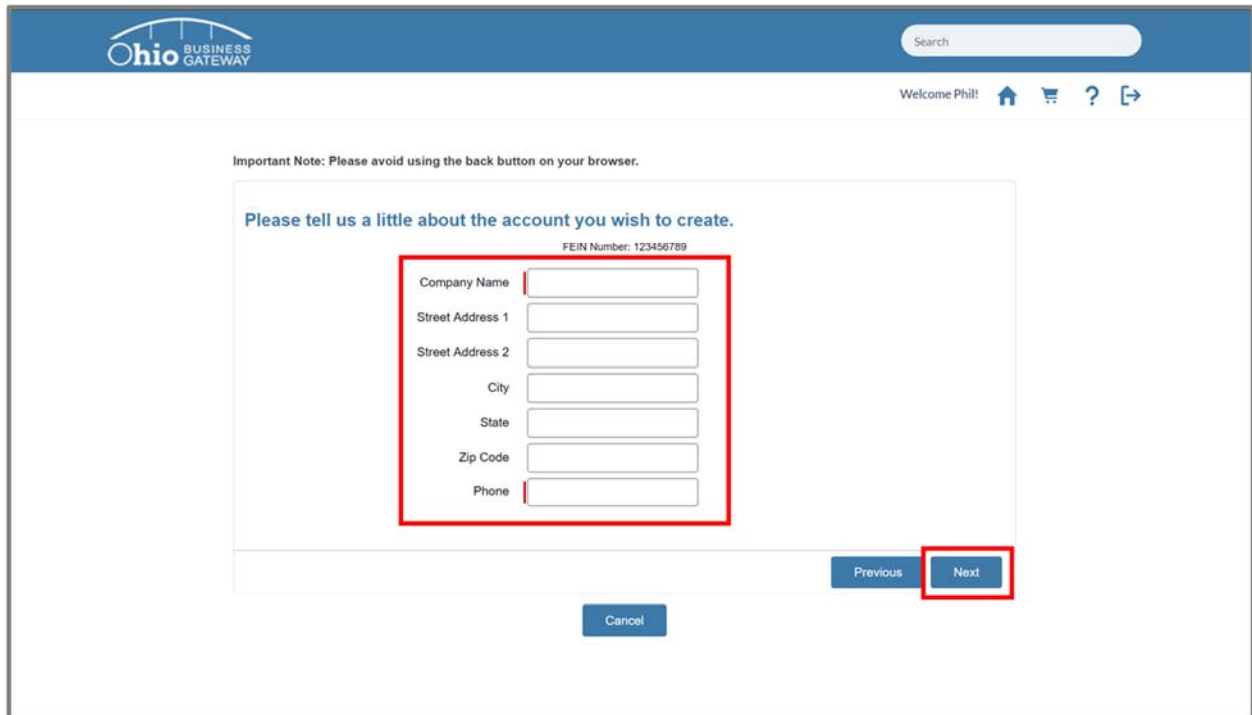


Figure 12 FEIN or SSN Selection on Gateway Account Creation Pages

Finally, enter the name of the business you are associated with and fill in the appropriate contact information. Then click the “Next” button to finish creating your Gateway business account.



The screenshot shows the Ohio Business Gateway account creation interface. At the top, there is a search bar and a welcome message "Welcome Phill!". Below this, an important note states: "Important Note: Please avoid using the back button on your browser." The main form area is titled "Please tell us a little about the account you wish to create." and includes a pre-filled "FEIN Number: 123456789". The form contains several input fields: "Company Name", "Street Address 1", "Street Address 2", "City", "State", "Zip Code", and "Phone". A red box highlights the "Company Name" field and the "Next" button. Below the form, there are "Previous", "Next", and "Cancel" buttons. The "Next" button is also highlighted with a red box.

Figure 13 Name and Contact Information on Gateway Account Creation Pages

8. Set Up Your Gateway Account

After either requesting access to or creating a new Gateway business account, you are taken to your Gateway **Business Dashboard**.

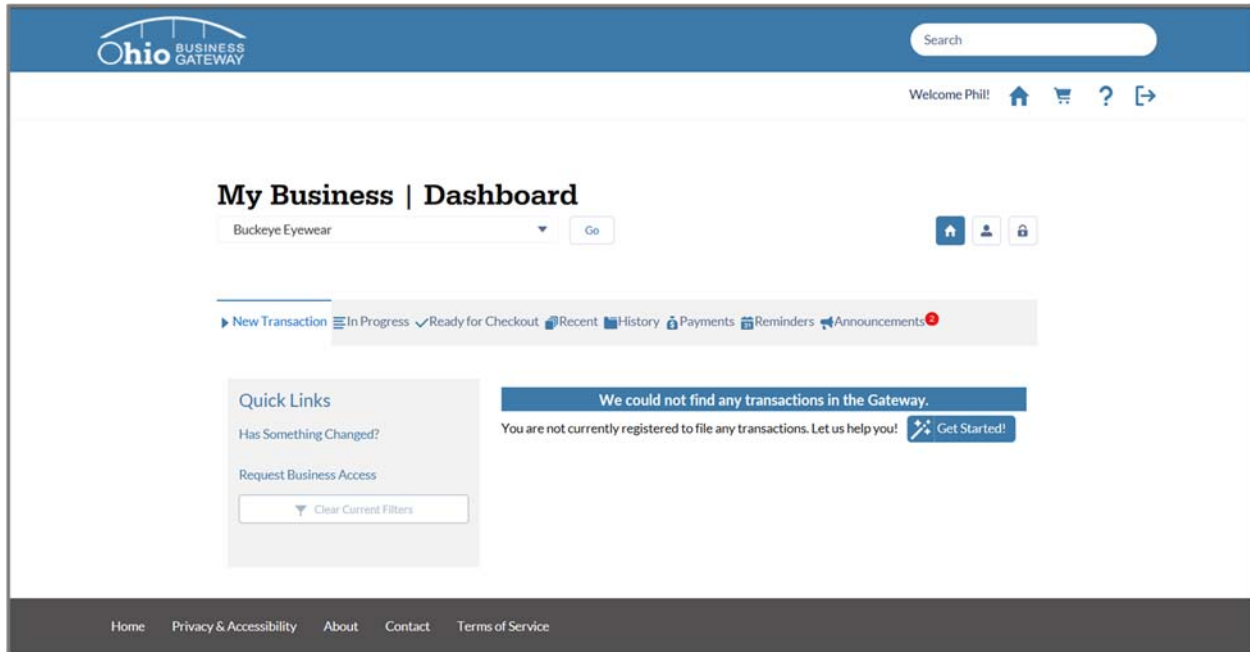


Figure 14 Gateway Business Dashboard

9. Complete the Registration Wizard

If you created a new Gateway account, click on the blue “Get Started” button or the “Has Something Changed?” link in the *Quick Links* table on the left-hand side of the **Business Dashboard** to be directed to the Ohio Business Gateway’s business registration wizard.

If you already are familiar with the transactions you should file on the Gateway, move on to [Step 9](#).

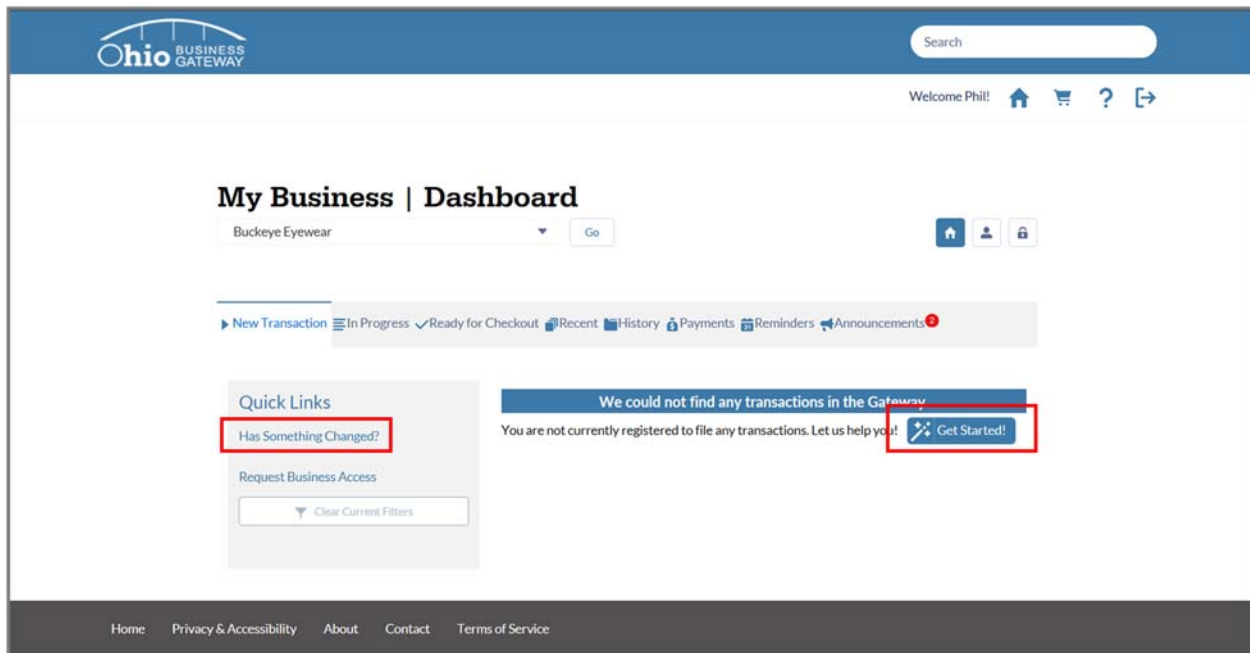


Figure 15 Get Started with the Registration Wizard from the Business Dashboard

The Gateway's business registration wizard will ask you a series of questions about your business and will recommend the Service Areas for which you should consider registering. The recommended Service Areas will automatically be added to your business account.

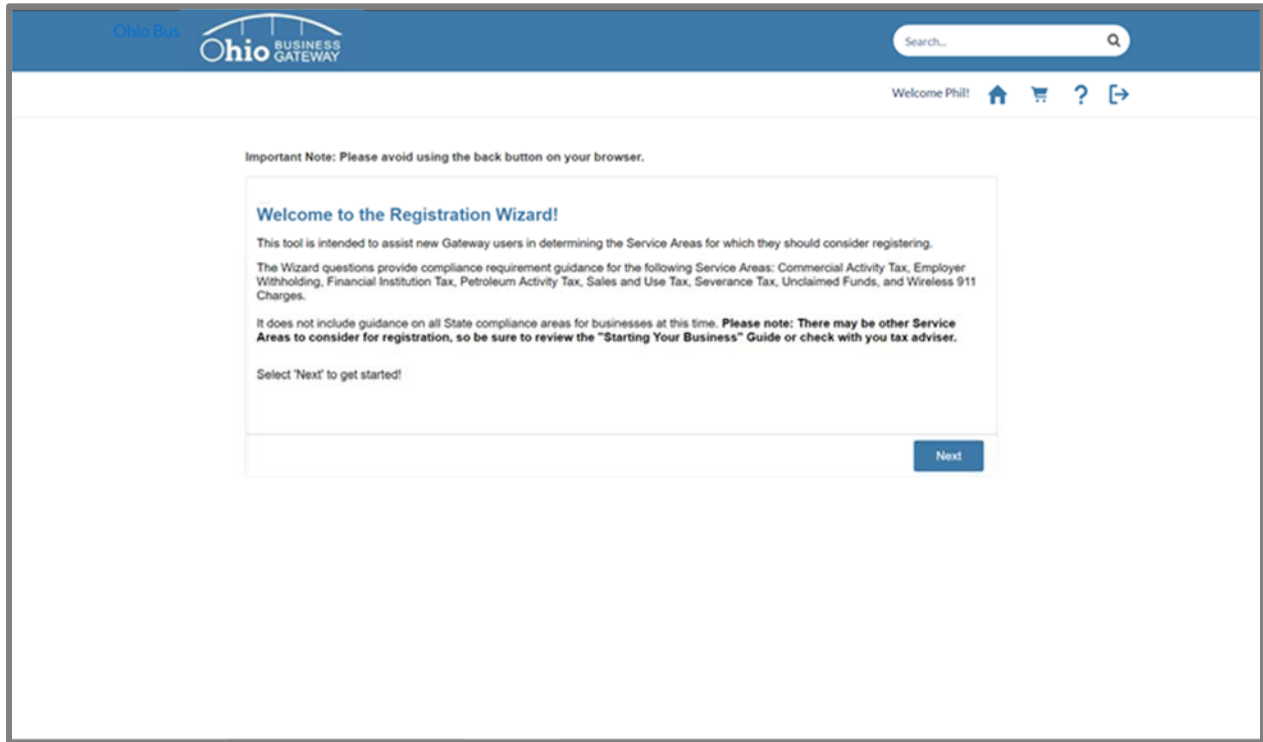


Figure 16 Welcome to the Registration Wizard! Page

After completing the wizard and reviewing your recommendations, you can print the list of Service Area recommendations using your browser's print functionality and then click the "Finish" button to be directed back to your **Account Access Management** page.

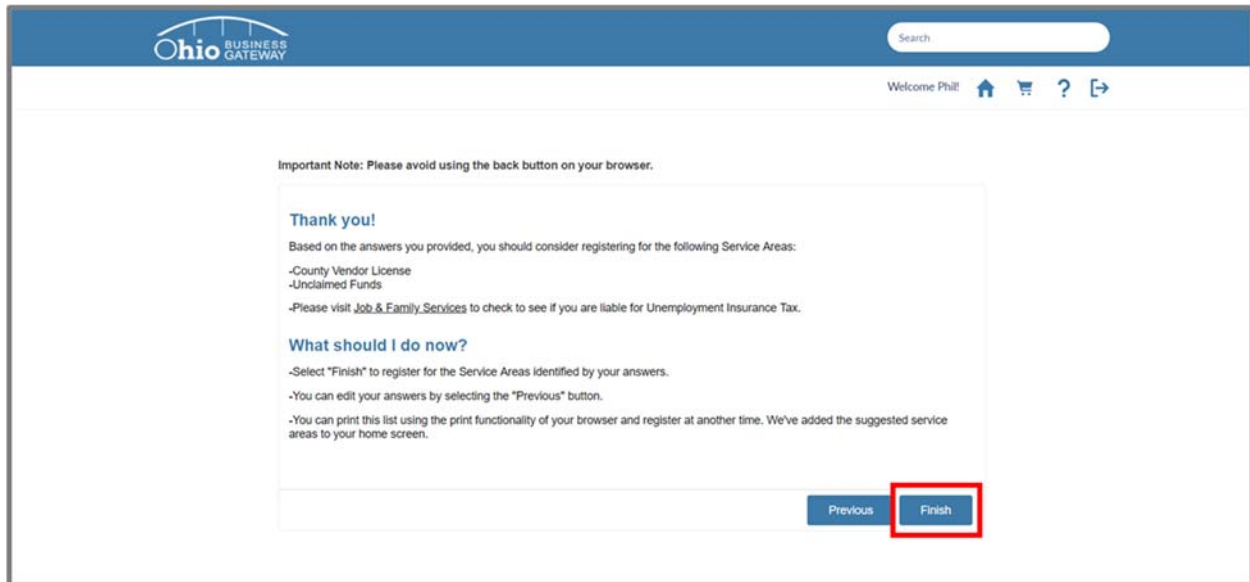


Figure 17 Wizard Recommendations Page

10. Add Service Areas and Transactions to Your Account

To add additional Service Areas and transactions to your account, click the “Account Access Management” button in the top right-hand corner of the **Business Dashboard**.

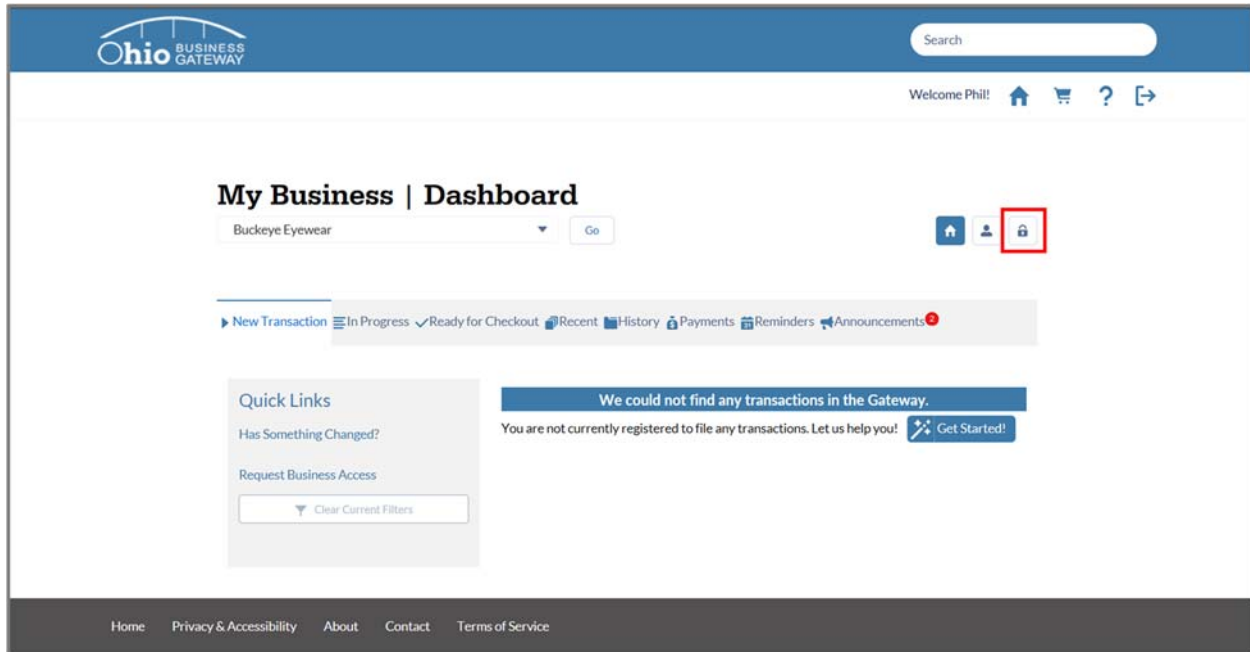


Figure 18 Account Administration Icon on the Business Dashboard

Add Service Areas

On the **Service Areas** tab, locate the *Available Service Areas* column and click the “+” icon next to the name of the Service Areas you would like to add to your account.

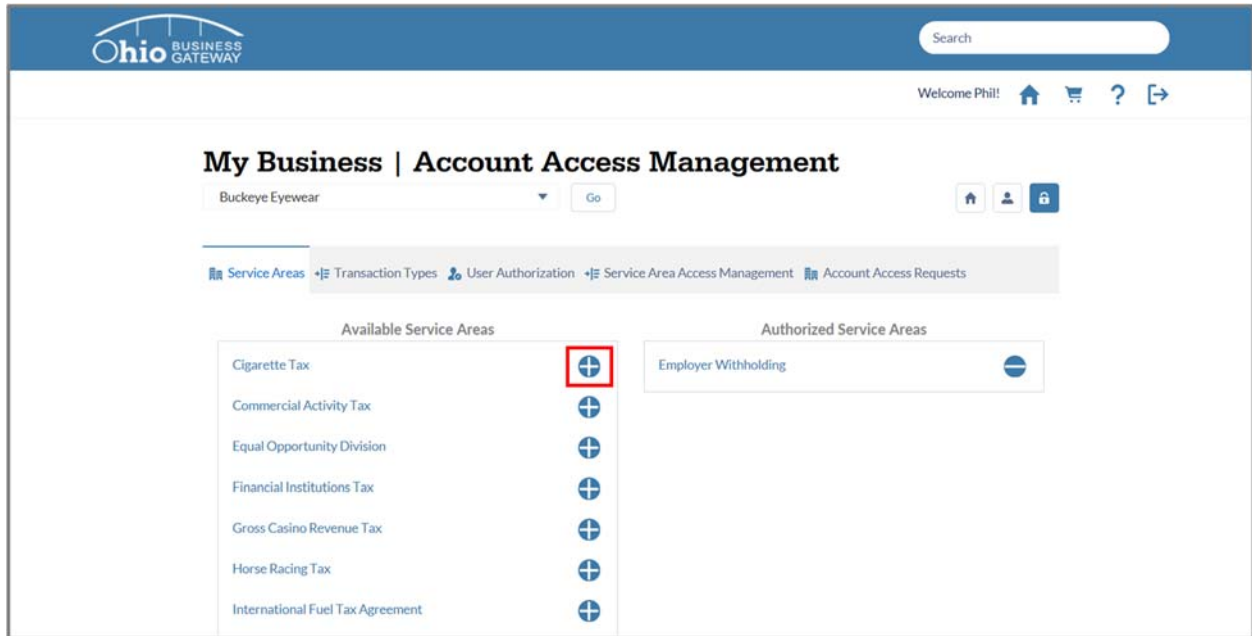


Figure 19 Adding Service Areas to a Business Account

Add Transactions

After you have added all the appropriate Service Areas to the *Authorized Service Areas* column, click the **Transaction Types** tab.

On this tab, click the “+” icon next to the transactions for which you would like to file within each Service Area to move them to the *Authorized Transaction Types* column.

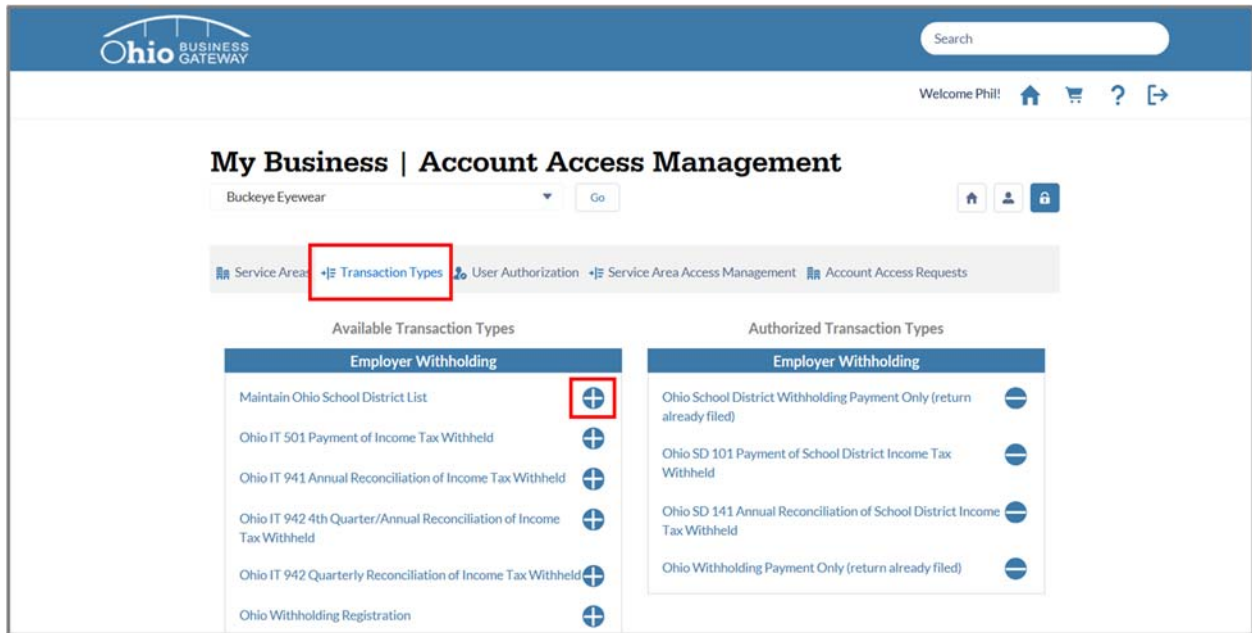


Figure 20 Adding Transaction Types to a Business Account

Complete User Authorization

After the appropriate transactions have been added, click on the **User Authorization** tab.

You can authorize the exact type of permissions for each transaction added to your account by user, Service Area and transaction by flipping the toggle buttons next to the applicable permission type.

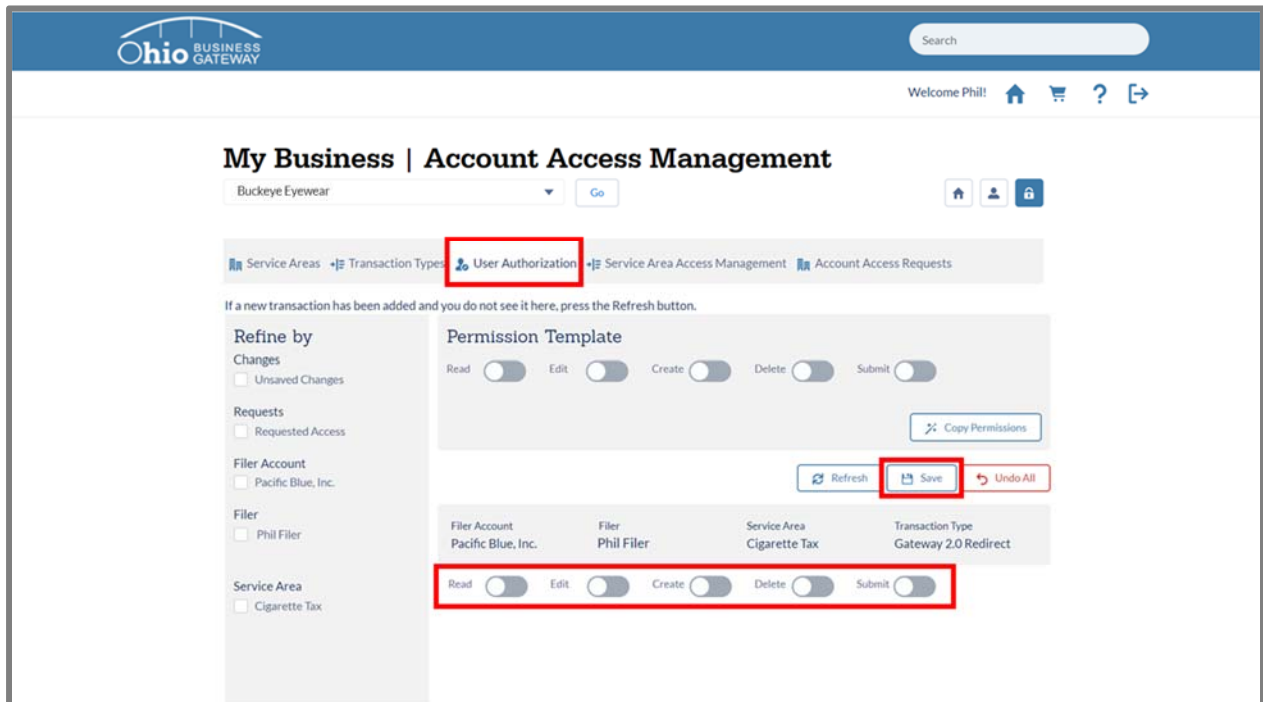


Figure 21 Granting Users Transaction-Level Permissions

After the appropriate permissions have been granted, click the “Save” button at either the top or the bottom of the page.

11. Finalize Account Setup

Now that you have added the appropriate Service Areas and transactions, as well as granted the appropriate user permissions, navigate back to your **Business Dashboard** by clicking on the “Home” button. Now you can select transactions to begin filing.

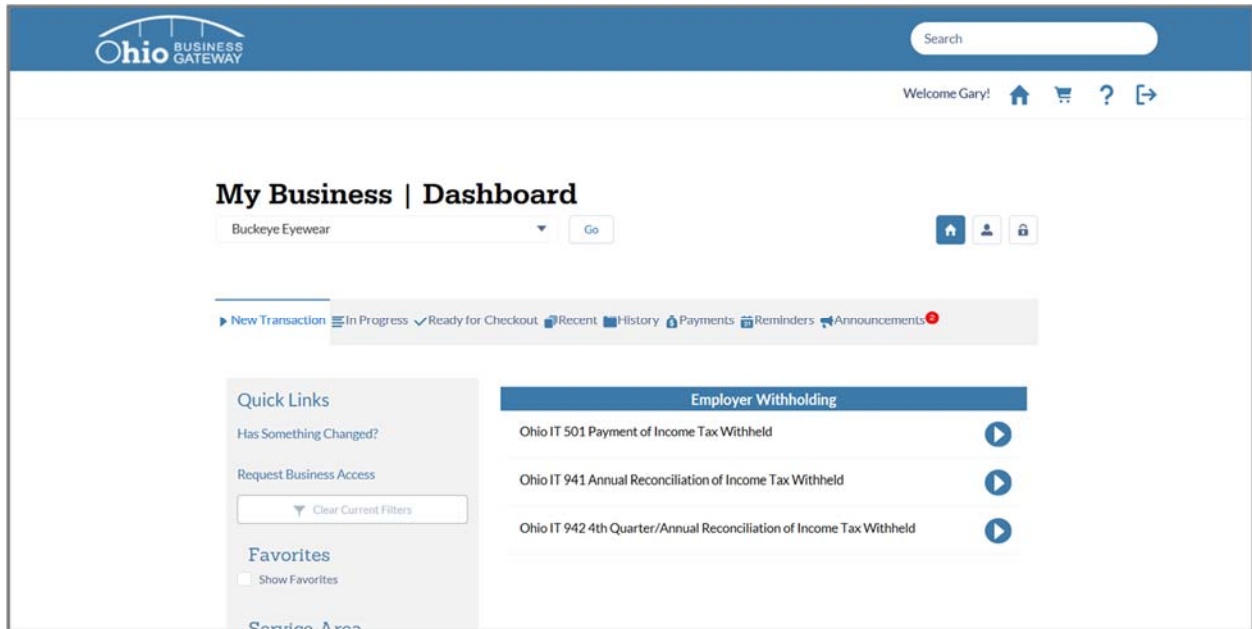


Figure 22 Populated *Business Dashboard* Page

This completes the process for new Gateway users creating an OH|ID account, creating a Gateway account and setting up a new Gateway business account for filing.