

# Example of calls received by the OBG help desk

- ❖ CPAs often ask to become a DTO (Direct Transaction Owner) of a business account stating the company wants it as well.
  - DTO should always be a direct employee of the business account
  - CPA can be DTO of their own CPA business account but not the client's business account
  - CPA should request access to become filing administrator for the client's business account
- ❖ A Letterhead process is required if the current filing administrator of the business account is no longer with the business, and you are asking to be set as filing administrator.
- ❖ Each person must have their own OHID and not take over some one else OHID account. Log-in information must not be shared.
- ❖ Calls received from companies asking why there were so many requests to gain access to their business account on OBG.
  - CPAs should make their clients aware when they are adding additional filers to the client's business account