Tip #1: Each person who will file transactions or make payments on the Gateway must register an individual OH|ID.

All Gateway users will need to create and use their own OH|ID. The OH|ID should have their own personal information on it, rather than the name of the business or the business owner's name. The sharing of OH|ID logins is strictly disallowed according to the State of Ohio Office of Information Security and Privacy policies.

OH|ID username and password allows a person to request access to business accounts on Ohio Business Gateway. Each person should create only 1 OH|ID to represent themself on the Gateway. Each OH|ID can be customized for the level of access needed for one or multiple business accounts on the Gateway.

For help in creating an OH|ID account, please follow the steps provided below.

Create Account

1. Visit the Gateway website
2. Click "Log In"
3. Click "Create Account"

Tip #2: The Filing Administrator for the CPA firm must approve their employee requests to the CPA's business account and confirm that they have the appropriate role.

The following steps are for approving access and confirming the employee's role

- Log into the Gateway
- From the Dashboard
- Click Account Access Management (padlock) icon
- Click Account Access Request
- In the Requests for Account Access section, in the Actions column, click to Reject (circle with the line through it) or Approve (circle with the checkmark) the request
- In the Account Access section, confirm the role is the appropriate role for the employee. If not, locate the employee's name and click on the Toggle Role icon to switch roles. (See below for role descriptions)

A Non-Filer is any direct contact (employee) or related contact (Service Provider) who cannot file transactions on behalf of the business or manage the business account's security. Non-Filers could potentially access other areas of the Gateway, such as Helpful Content and help cases.

A Filer is any direct contact (employee) or related contact (Service Provider) who can file transactions on behalf of the business, but who does not have access to manage the account security (for example, grant other user's permissions to see, create, edit, or submit transactions) on behalf of the business. Transaction-level permission to file must also be granted in order for a Filer to file a transaction.

A Filing Administrator is any direct contact (employee) or related contact (Service Provider) who has access to manage account security on behalf of the business. Transaction-level permission to file must also be granted in order for a Filer to file a transaction.

Tip #3: CPA firms should register their business on the Gateway. Additionally, all employees of the CPA firm should associate their OH|ID account with the CPA firm.

If the CPA firm has no tax liability in the State, it is still required that the firm be registered on the Gateway in order to file for the clients of the firm.

- Log into the [Gateway]
- From the Dashboard
- Click Request Business Access
- Enter the FEIN or SSN
- Select Desired Role (the first filer to register a business should select Filing Administrator as the role; the role can be changed in the future)
- Click Next
- Select to register the business under a FEIN or SSN
- Click Next
- Enter required field information (Legal Name, State and Phone Number)
- Click Next
- Do you need to register another company (if No click next, if Yes, the aforementioned steps will be presented again)

Additionally, each employee or representative of the CPA firm should request access to the CPA firm's FEIN the first time they log in to the Gateway. The first FEIN entered by a newly created OH|ID will establish a link to that CPA firm, and that first connection will be associated with all other business access requests.

For example, Zelda is an employee of Aaron's Accounting Professionals. Zelda should create an OH|ID for herself and request access to Aaron's Accounting Professionals' FEIN. All subsequent business access requests will display to the client that Zelda, representing Aaron's Accounting Professionals business, has requested access to their business.

- Log into the [Gateway]
- From the Dashboard
- Click Request Business Access
- Enter the FEIN or SSN
- Select Desired Role
- Confirm Company from drop down list
- Click Next
- Do you need to request access to another company? (if No click next, if Yes, the aforementioned steps will be presented again)

Tip #4: The CPA firm's Filing Administrator for a client can maintain access to the business account(s), service area(s), transaction type(s) for the CPA firm's employees only.

At least one employee from the CPA firm should request Filing Administrator access to clients' business accounts on the Gateway. Granting Filing Administrator access to a Service Provider does not override the business owner's or direct contact's access. There can be multiple Filing Administrators associated with an account. A Filing Administrator can always approve their own transaction access but may be restricted from approving other people's transaction access (such as the business owner). A Service Provider Filing Administrator will also need to approve the Service Areas they file for prior to authorizing transactions.

Service Provider Filing Administrators can also approve and authorize requests from other individuals who have the same direct business relationship (employer). For example, Zelda and Aaron are both directly related to Aaron's Accounting Professionals in the Gateway; Aaron is the Filing Administrator and Zelda is a non-Filer. Aaron has also been granted Filing Administrator access to his client's business, Joey's Landscaping. Joey is a direct Filing Administrator for Joey's Landscaping, so he can approve any requests that come in for his own business. When Zelda requests access to Joey's Landscaping, her request can be approved by either Joey (the direct Filing Administrator) or Aaron (a Filing Administrator with the same direct business as Zelda). If Joey's direct employee Beth requested access to the business, only Joey can approve Beth's request. Although Aaron is a Filing Administrator on the account, he is not able to maintain Joey or Beth's access because they do not share the same direct business relationship. A CPA firm should never register their client's business or be a direct Filing Administrator for their client's business.

Adding Service Area and Transaction Type

- Log into the Gateway
- From the Dashboard
- Click Account Access Management (padlock) icon
- On the Service Areas Tab, locate the Service Area the business account needs access to
- In the Available Service Areas click on the Service Area needed
- The Service Area will be moved to the Authorized Service Areas column
- Click on the Transaction Types tab
- In the Available Transaction Types column, click on all the Transaction Types that the business account will need to file. You may select all or just the ones needed

Tip #5: User Authorization permissions are assigned by the Filing Administrator for all Filers and Filing Administrators associated with the CPA firm.

When a Filer or Filing Administrator with the CPA firms request Service Area access, the role of the Filing Administrator is to approve the request and to assign the permissions to the specific Transaction Types.

There are 5 different permissions per transaction type.

- Read – start a new filing or view a filing in progress
- Edit – edit a filing that is currently in progress, regardless of who started the filing
- Create – start a new filing
- Delete – remove any in progress filings
- Submit – submit the filing and make a payment

Filer or Filing Administrator Requesting Service Area Access

- Filing Administrator or Filer logs into the Gateway
- From the Dashboard
- Select the company name from the dropdown menu just below My Business | Dashboard
- Click Go
- Click the Administration (person) icon
- Click Access Requests tab
- Scroll down to Service Area Access Requests
- In the Business Filing Service Areas column click on the Service Area needed
- Once requested, an automatic email is triggered to the Filing Administrator informing them that Service Areas access has been requested
    - If you're a Filer, you can request additional Service Area Access by repeating the aforementioned steps or go back to the Dashboard/Home Page
    - If you're a Filing Administrator, continue to the next step to approve the request for yourself and assign roles

Filing Administrator Approving Service Area Access and Assigning Transaction Type Permissions

- From the Dashboard
- Click Account Access Management (padlock) icon
- Click on the Service Area Access Management tab
- In the Requested Service Area Access section, locate the requestor and click to Approve (circle with the checkmark) the request or Reject (circle with the line through it)
- Click Confirm in the popup window
- Click on the User Authorization tab
- Use Refine by (on the left) to locate the Filer. Check the box to filter by requestor's name
- Use Refine by (on the left) to locate the Service Area. Check the box(es) to select filter by requested Service Areas
- In the center of the screen, select the permission level for each Filer, Service Area, and Transaction Type(s) that has been requested
- Once permission(s) have been selected, click Save; a message will display confirming that the request was successfully completed
- Filing Administrator should notify the Filer that the request has been approved

Tip #6: Getting help on the Gateway.

Use the search feature in the top navigation bar to find Knowledge Articles, BPM Transactions (Transaction History) and Cases.

If you find yourself in a situation that cannot be resolved using the search feature, you can open a help case on the Gateway under Administration (person icon) and select the Cases tab or contact the Gateway Help Desk at 1 (866) 644-6468.