

VIRGINIA DEPARTMENT OF TAXATION

Systems Access Authorization Request for External Users

Organization Information

Office Name _____

Office Address _____

Office FIPS Code _____ Agency Number (if applicable) _____

User Name: Last _____ First _____

User Authorization Requested (choose only one)

☐ New Access Effective Date: _____
 ☐ Change Access Effective Date: _____
 ☐ Recertification Effective Date: _____
 ☐ Terminate All Access Effective Date: _____

User Title _____ User Phone Number _____

User SSN _____ 2-Factor Authentication Phone Number _____

User Email Address _____

☐ User Name Change – New Name _____ Effective Date: _____

User Permissions (check all that apply)

	Add	Delete		Add	Delete
Director of Finance	☐	☐	Virginia Employment Commission (VEC)	☐	☐
Commissioner of Revenue	☐	☐	Other Agency Credit Administrator	☐	☐
Treasurer	☐	☐	DSS Child Support Enforcement	☐	☐
Treasurer Lien Income Verification Access	☐	☐	Setoff Agency	☐	☐
Locality Reports Contact/Recipient	☐	☐	Primary Setoff Debt Collector	☐	☐
Bank Franchise Tax Principal Office Locality	☐	☐	1st Alternate Setoff Debt Coordinator	☐	☐
Bank Franchise Tax Branch Office Locality Report	☐	☐	2nd Alternative Setoff Debt Coordinator	☐	☐
Secure File Transfer Access via EESMC	☐	☐	Primary Security Administrator	☐	☐
Outside Collection Agency (OCA)	☐	☐	Secondary Security Administrator	☐	☐

Confidentiality of Tax Information and Signature

All information available using Virginia Tax information systems is considered confidential. Confidential tax information may be accessed and used only for the purpose for which access and use is authorized by Virginia Tax. I understand that the unauthorized disclosure of confidential tax information is a Class 1 misdemeanor, and that I am bound by the provisions of Virginia Code § 58.1-3.

By signing below I acknowledge that the access requested above is needed for my official job duties and I acknowledge my understanding of the Confidentiality of Tax Information and Virginia Tax System Access and Use Statements above.

User Signature _____ Date _____

Security Administrator Approval

This form must be signed by the Primary or Alternate Security Administrator for the user's organization.

Signature _____ Date _____

Print Name _____ Phone Number _____

Fax this form to: 804.774.3898.

Training must be completed prior to submitting this form.

VIRGINIA DEPARTMENT OF TAXATION

Instructions for Form SA-TAX-E

General: Use Form SA-TAX-E to request access or modify access to the Virginia Tax systems for representatives of authorized external organizations as identified on the form.

All required training must be completed before system access is granted. To request training, send an email to Virginia Tax Security Administration at **External.Entity.DocForms@tax.virginia.gov**. Include contact information for both the user and the user's supervisor as well as the reason or business need for system access.

Confidentiality of Tax Information: All information available using Virginia Tax information systems is considered confidential. Confidential information may be accessed and used only for the purpose for which access and use is authorized by Virginia Tax. The unauthorized disclosure of confidential tax information is a Class 1 misdemeanor. The user is bound by the provisions of Virginia Code § 58.1-3.

Organization Information: Complete Office Name, Mailing Address, FIPS Code, Agency Number (if applicable) and the User Name information.

User Authorization Requested: Check only *one* box to indicate whether this is a request for new access, a request to change access, a request for recertification or a request to terminate all access.

To set up a new user, check the box for New Access and complete all applicable fields. The user's SSN is required for compliance with the Commonwealth of Virginia Security Standard SEC2001-01.1, and the Disclosure of Official Tax Information Handbook. **The SSN is not used as a unique identifier. It is necessary to prevent unauthorized access to the user's tax records.**

Include a Two Factor Authentication Phone Number to allow the system to call you directly at the phone number of your choice. If not included the User Phone Number will be used during the account set up process.

Be sure to indicate when access should be effective.

User Permissions: Check all applicable add and delete boxes in this section for the authorization requested.

- Check Director of Finance, Commissioner of the Revenue, or Treasurer if applicable.
- Check Treasurer Lien Income Verification Access if applicable.
- See attached list of reports for each user group. To receive locality reports, check the Locality Reports Contact/Recipient box.
- Check Bank Franchise Tax Contact to obtain access to certify Bank Franchise Tax returns. Up to 2 users are allowed for the locality.
- Branch Office Localities that review Schedules C & H, check the Bank Franchise Report Branch Office Locality Report box. Two recipients are allowed.

- Localities that submit Estimated Tax and Set Off Agencies that need access to secure messaging for file transfers, check the Secure File Transfer Access Via EESMC box.
- Outside Collection Agency representatives performing normal collection activities on Virginia Tax referred accounts, check the OCA Collection box.
- Check the Virginia Employment Commission (VEC) box for user access to perform VEC duties.
- Check the Other Agency Credit Administrator box for access needed for tax credit administration purposes.
- Check the DSS Child Support Enforcement box for Department of Social Services (DSS) Child Support Enforcement activities.
- Check the Setoff Agency box and one of the coordinator boxes for debt setoff program administration access. For Treasurer and Director of Finance users that need setoff information, check the Setoff Agency box.
- Check the applicable box for Primary Security Administrator or Secondary Security Administrator updates for the organization.

Confidentiality of Tax Information and Signature: The user must sign and date the form before access can be granted by the Virginia Tax's Security Administration.

If the form is being sent for a termination or deletion of access to the system, the user does not need to sign.

Security Administrator Approval: Either the Primary or Alternate Security Administrator from your organization must sign the form before it can be processed.

The **Primary Security Administrator** has the authority to approve requests for access to Virginia Tax systems.

The **Alternate Security Administrator** has the authority to approve requests for access to Virginia Tax systems when the primary security administrator is unavailable.

System Upgrades in Progress

Virginia Tax is implementing major system upgrades that will occur over a 4-year period. Certain taxes and enhanced online services will move to the new platform each year. The first roll-out in September 2026 includes the taxes and fees for Sales and Use, Withholding, Digital Media, Vending Machine, Plastic Bag, Prepaid Wireless, and Tire Recycling. As part of the initial rollout, the Locality, VEC, and Outside Collection Agency external users will be granted access to the new online portals for Localities, state agencies (VEC), and Outside Collection Agencies. The new portals provide access to the new system functionality that is consistent with their existing system access.

Virginia Tax will send notifications to external users with instructions for setting up their new online portal accounts. Use Form SA-TAX-E for new or modified access requests only.

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External User Reports Available

Reports sent to the Treasurer's Report Contact

291.0 EESMC Secure Transfer File Report
056.0 Local Estimated Electronic Files Totals Report
248.T Communications Tax Distribution Report
075.0 Vehicle Rental Tax Distribution Report
591.0 Semi-Annual Locality Distribution Comparison Report
591.A Semi-Annual Locality Distribution Comparison Report
578.0 Peer-to-Peer Vehicle Sharing Tax Distribution Report

Reports sent to the Commissioner of Revenue Report Contact

285.0 Communication Tax Providers Report
280.0 Locality Sales Tax Information
061.1 Registration Tax Type Activity for the Month
243.A Sales Tax Dealers Monthly Reports
061.0 Registration Tax Type Activity for the Month
004D.1 Locality Distribution Detail Information
004D.0 Locality Distribution Detail Information
008.E Returns Posting Statistical Info Report
248.T Communications Tax Distribution Report
008.G Returns Posting Electronic Paper Report
148.A Gross Receipts for Localities Report
075.0 Vehicle Rental Tax Distribution Report
008.F Returns Posting Statistical Info Report
008.D Returns Posting Refunds Tax Dues Report
578.0 Peer-to-Peer Vehicle Sharing Tax Distribution Report
003.A Locality Transfers Detail Report
008.H Returns Posting Electronic Paper Report
004H.0 Games of Skill Distribution Report
589.0 Collections of Additional Local Sales Tax Report
591.0 Semi-Annual Locality Distribution Comparison Report
591.A Semi-Annual Locality Distribution Comparison Report
004G.0 Locality Historic Triangle Distribution Detail Report
594.0 Collections of Disposable Plastic Bag Tax Report
269.0 Metro Richmond Sales Tax Distribution Report

Reports sent to Setoff Agencies (All 3 Coordinators)

Match File (Record Type E)
Pre-Default Update Contested Date File (Record Type K)
Claim Number Assignment File (Record Type C)
Match Update Error File (Record Type H)
Payment Information File (Record Type G)
Defaulted Match File (Record Type I)
Withdrawal of TAX Refund/DCA Pymt to Setoff Agency
New Claims Error File (Record Type J)
Withdrawal of TAX Refund to Set-Off Agency

Reports sent to Setoff Agencies(Primary)

Acknwldgmnt of Participation in Set-Off - Initial
Acknwldgmnt of Participation in Set-Off-Modified

Reports sent to OCA via FTP

005.0 Penn Credit OCA Fee Report
014.1 Bankruptcy OCA Fees Report