**Permission Levels for**
**Plus and Premium Subscriptions**

Permission for team members were created so that you can manage the different kinds of access levels you want to give to your team. Levels include the following: **Admin**, **Editor**, and **Viewer**.

**Admin**

If you assign a team member Admin permissions, they will have access to perform any action in your account. Permissions for Admins include the following:

- Manage company settings
- Invite and manage other team members
- Import and create new forms
- Check out forms
- Create and manage payers and recipients
- Request TIN Matching
- Run Summary and Totals reports
- Print forms

**Editor**

Team members with Editor Permissions can help manage tax forms as well as payers and recipients, but they cannot access account-level functions such as billing and subscriptions or managing other team members. Permissions for editors include the following:

- Import and create new forms
- Check out forms
- Create and manage payers and recipients
- Request TIN Matching
- Run Summary and Totals reports
- Print forms

**Viewer**

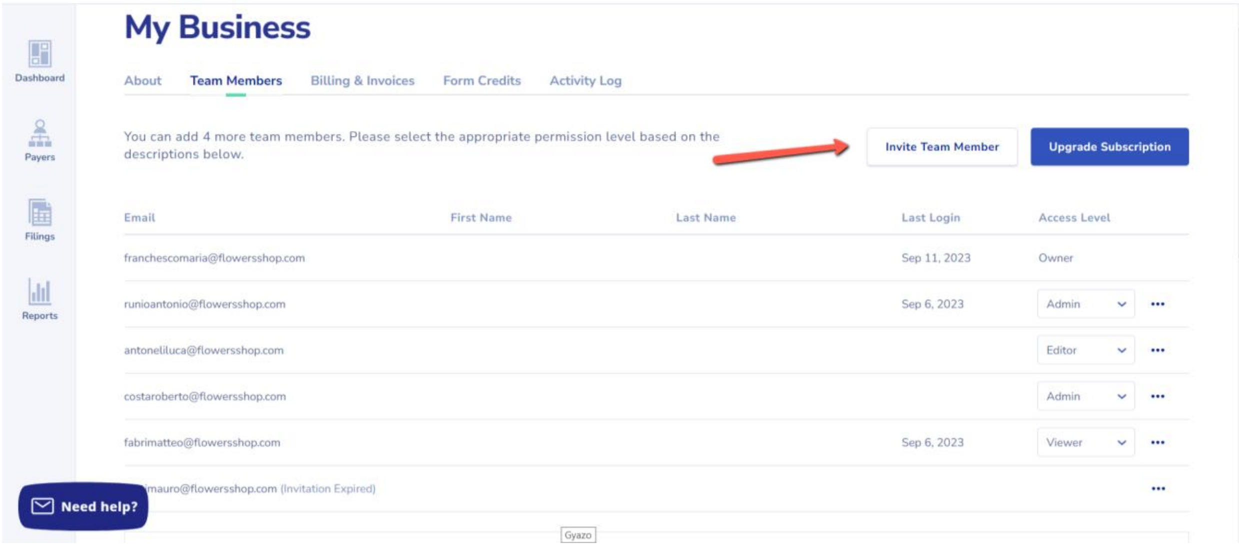
Assign viewer permissions to team members you do not want editing forms, or payers and recipients. Viewers can simply review forms and payers and recipients. Permissions for editors include the following:

- View tax forms in progress or filed
- View payers and recipients
- Run Summary and Totals Reports
- Print Forms

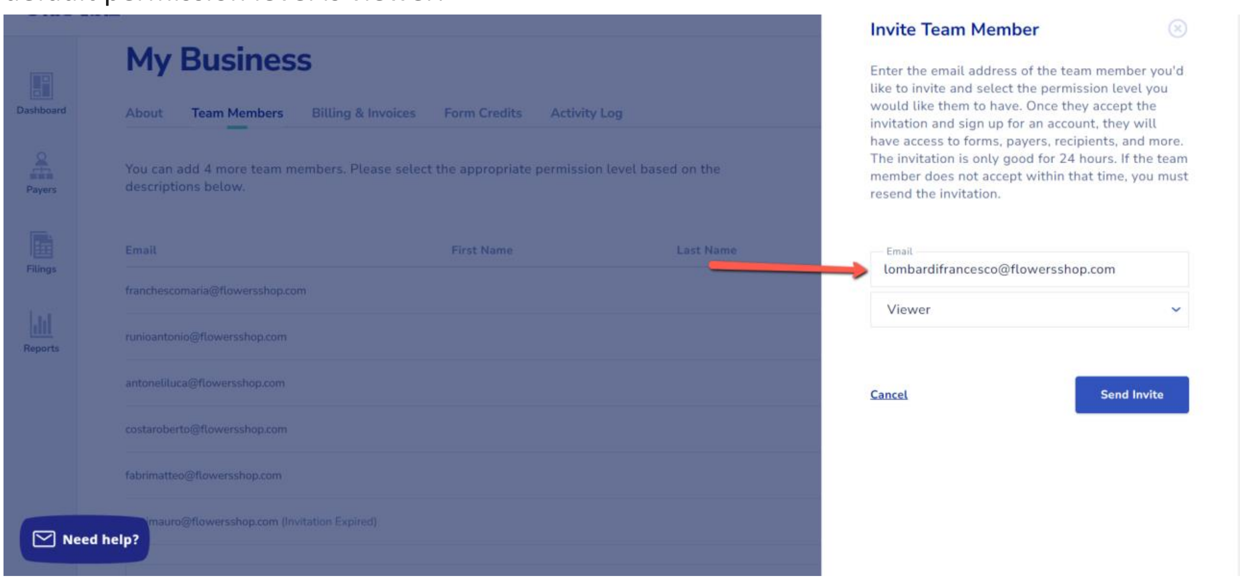
**How to Assign Permissions to Team Member?**

Permission level can be assigned to team members when first inviting them or any time after they join. When you invite a new team member, you receive a slide panel. Here you must put in the email address of the team member you wish to invite and choose the permission level you want them to have.

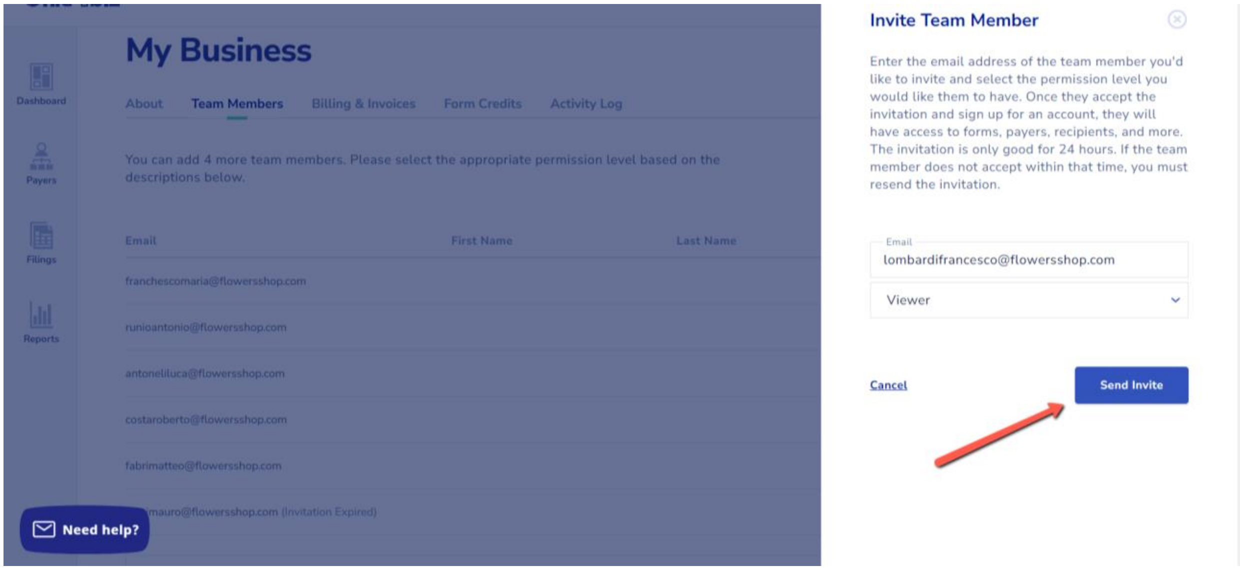
1. Navigate to Team Members tab. Select the “Invite Team Member” button.



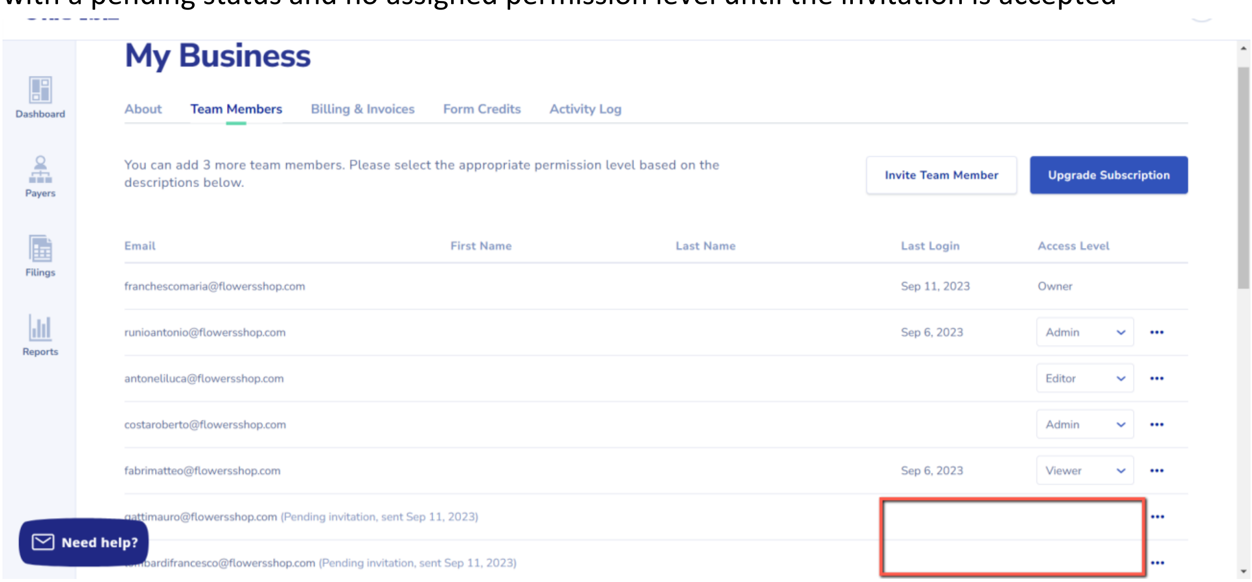

2. The Invite Team Member slide panel will open. Add email address and select permission level. The default permission level is viewer.



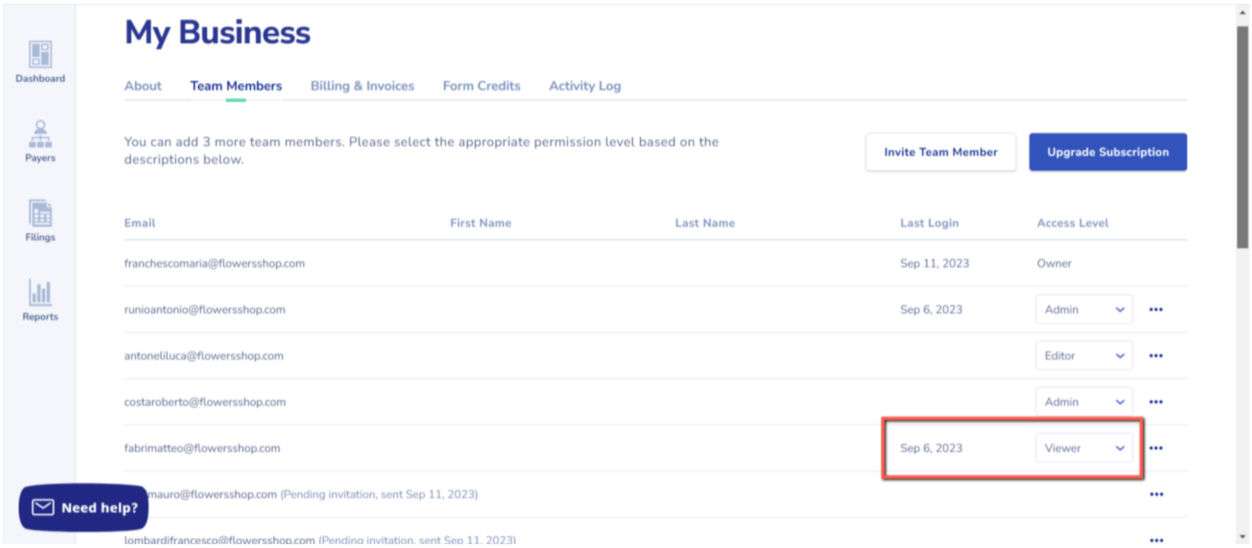
3. Send invite.



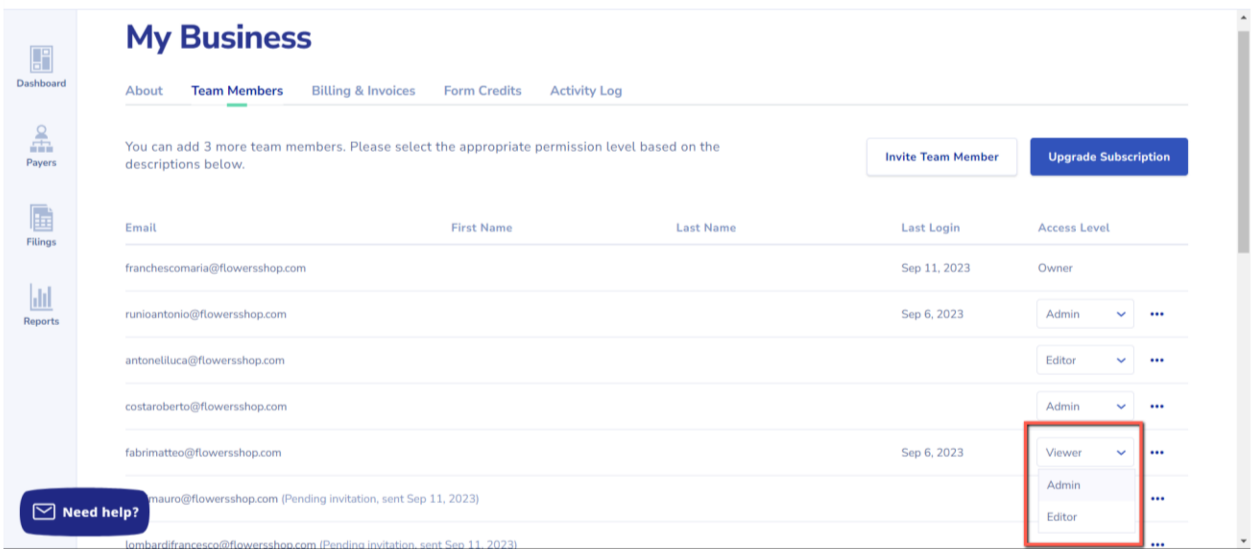

4. Upon successful invitation, the team member will appear in the list of users on the Team Members tab with a pending status and no assigned permission level until the invitation is accepted



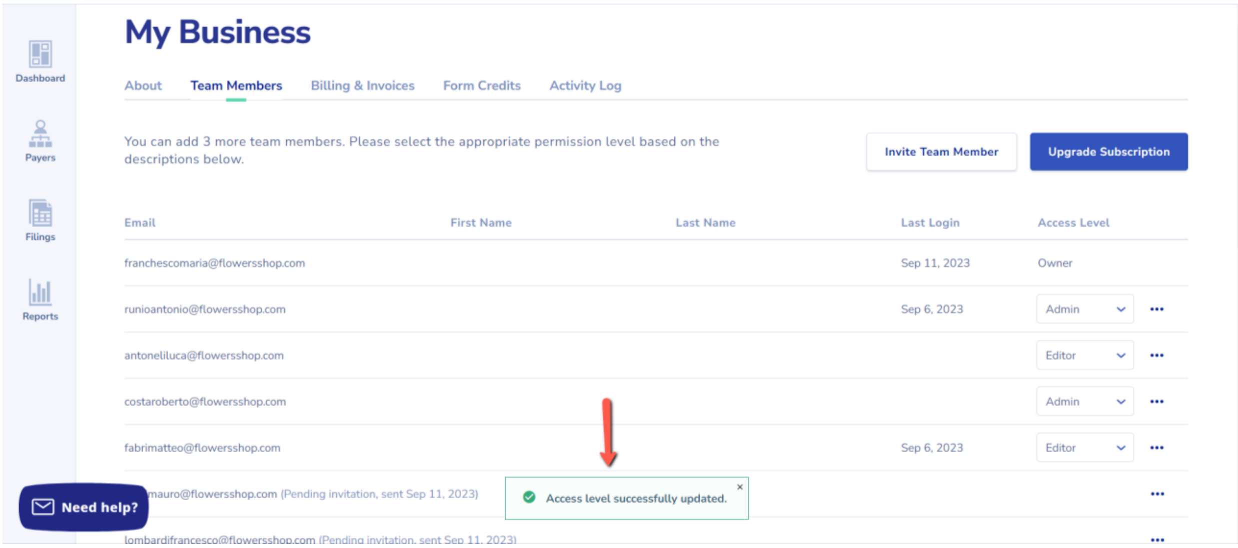
5. Once the invitation is accepted, the permission level will be displayed in the Access Level column




6. You or anyone with Admin permissions may change this level at any time by finding the team member, selecting the access level dropdown, and selecting a new permission



7. Upon selection, a success message will confirm the change




A summary of permission levels can be found on the bottom of the **Team Members** tab of the **My Business** page.

| Features | Viewer | Editor | Admin | Owner |
|---|---|---|---|---|
| Manage Forms by importing your form data and creating guided forms | | ✓ | ✓ | ✓ |
| View forms progress | ✓ | ✓ | ✓ | ✓ |
| Print forms in progress to preview before filing | ✓ | ✓ | ✓ | ✓ |
| Manage Forms in the Card | | ✓ | ✓ | ✓ |
| Ability to file forms | | ✓ | ✓ | ✓ |
| View and Print filed forms | ✓ | ✓ | ✓ | ✓ |
| Connect to your accounting and other tax software to import your form data | | ✓ | ✓ | ✓ |
| Manage Payers and Recipients | | ✓ | ✓ | ✓ |
| View Payers and Recipients | ✓ | ✓ | ✓ | ✓ |
| Manage TINs requests (add to cart and submit) | | ✓ | ✓ | ✓ |
| Purchase Form Credits | | | ✓ | ✓ |
| Ability to apply Form Credits at check-out | | ✓ | ✓ | ✓ |
| Add or update payment information | | | ✓ | ✓ |
| Purchase and upgrade subscription | | | ✓ | ✓ |
| Manage Team Members (add new, remove existing, add additional Team Members to the plan) | | | ✓ | ✓ |
| Manage Access Level | | | | ✓ |