

Department of Justice  
Gambling Control Division



# TAP Instructions for Gambling Operators

## Applications & Account Management

Taxpayer Access Point



Montana Department of Revenue

**Menu**

- Home
- Back
- Help

## Welcome to Taxpayer Access Point (TAP)



### Individual

- [File a Return](#)
- [Retrieve a Saved Return](#)
- [Make a Payment](#)
- [Where's My Refund](#)
- [Add Power of Attorney](#)
- [\\*NEW\\* Verify Return](#)



### Business

- [Add Power of Attorney](#)
- [Request Account ID](#)
- [File PT-AGR](#)
- [File PT-STM](#)
- [Tax Certificate Application](#)
- [\\*NEW\\* File Upload](#)



### Unclaimed Property Click for Cash

- [Search for Unclaimed Cash](#)
- [Retrieve a Saved Claim](#)
- [Track Your Claim Status](#)
- [Quick Claim Letter](#)
- [What You Will Need](#)



### Liquor

- [Liquor Pricing Calculators](#)
- [License Search](#)
- [Retrieve a Saved Application](#)
- [Beer/Wine Label Search](#)
- [Temporary Authority Search](#)

**LOGIN**

[Forgot my Password](#)

Username

Password

Login



Authorization Code:

**SIGN UP FOR ACCOUNT ACCESS**

- [Who Can Use TAP Login Access?](#)
- [DOR - Individual, Business, Liquor](#)
- [DOJ - Gambling Control Division](#)

Sign up Now!



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## Creating an Account

The following link can be used to access TAP, <https://tap.dor.mt.gov/>

If you have not accessed TAP before you will see the following page and can click on the “Sign up Now!” button.

The screenshot shows the Taxpayer Access Point (TAP) interface. The header includes the Montana Department of Revenue logo and the text "Taxpayer Access Point MTS" and "Montana Department of Revenue". The main heading is "Welcome to Taxpayer Access Point (TAP)".

On the left, there is a "Menu" section with links for Home, Back, and Help, and a "TAS" section with "Toggle Log" and status information: "RunDate: 03-Sep-2014" and "Last Request: 1041ms".

The central content area is divided into four categories:

- Individual**:
  - File a Return
  - Retrieve a Saved Return
  - Make a Payment
  - Where's My Refund
  - Add Power of Attorney
  - Login Features
- Business**:
  - Add Power of Attorney
  - Request Account ID
  - File PT-AGR
  - File PT-STM
  - Tax Certificate Application
  - Login Features
- Unclaimed Property** (Click for cash):
  - Search for Unclaimed Cash
  - Retrieve a Saved Claim
  - Track Your Claim Status
  - Quick Claim Letter
  - What You Will Need
- Liquor**:
  - Liquor Pricing Calculators
  - License Search
  - Server Training
  - Retrieve a Saved Application
  - Beer/Wine Label Search

On the right, there is a "LOGIN" section with a "Forgot my Password" link, fields for "Username" and "Password", and a "Login" button. Below this is an "Authorization Code" field. At the bottom right, there is a "SIGN UP FOR ACCOUNT ACCESS" section with links for "Benefits of Signing Up", "Who Can Use TAP Login?", and "Tax Types Available on TAP". A "Sign up Now!" button is circled in red.

Click on “Select Account Type”

The screenshot shows the "Sign up for TAP access" page. The header is the same as the previous screenshot. The main heading is "Sign up for TAP access".

On the left, there is a "Menu" section with links for Home, Back, and Help, and a "TAS" section with "Toggle Log" and status information: "RunDate: 03-Sep-2014" and "Last Request: 1105ms".

The central content area has a "Step 1: Select Account Type" link circled in red. To the right of this link are "Submit" and "Cancel" buttons.

Choose an account type

Taxpayer Access Point MTS Montana Department of Revenue

Step 1

Select your account type, or if you are a tax preparer enter your SSN or FEIN

Select Your Account Type

**Taxpayer**

Professional

Are you a Professional Tax Preparer?

As a tax preparer, enter your SSN or FEIN

911 Emergency Telephone Fee  
Agency Liquor Store Account  
Bad Debts  
Beer  
Beer Connoisseur Tax  
Bentonite Production Tax  
Brewery Storage Depot License  
Card Dealer License  
Card Room Contractor  
Cement & Gypsum Prod Lic Tax  
Cigarette  
Coal Gross Proceeds  
Coal Severance Tax  
Common Carrier Tax

Submit Cancel

Click on ok

Taxpayer Access Point MTS Montana Department of Revenue

Step 1

Select your account type, or if you are a tax preparer enter your SSN or FEIN

**Taxpayer**

Select Your Account Type

Gambling Operator

OR

**Professional Tax Preparer**

Are you a Professional Tax Preparer?

No

As a tax preparer, enter your SSN or FEIN

OK Cancel

Submit Cancel

Select "Business Account Registration"

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Submit Cancel

Menu  
Home  
Back  
Help

TAS Toggle Log  
RunDate: 03-Sep-2014  
Last Request: 611ms

Sign up for TAP access

Step 1: [Select Account Type](#)

Account Type: Gambling Operator

Step 2: **Business Account Registration** << Needs Correction

Enter the GOA or ONP account ID and Zip Code and click "ok"

The screenshot shows the 'Account Registration Authentication' dialog box on the Montana Department of Revenue website. The dialog box contains the following fields and options:

- Account ID: 6245599-002-GOA
- Country: USA
- Zip Code (for your account): 59601
- Check if you wish to continue receiving paper returns and vouchers:

Buttons: OK, Cancel

Validation messages: A red text message '<< Needs Correction' is visible next to the Zip Code field. A yellow tooltip with the text 'Required' and 'Format:' is also present over the Zip Code field.

From this point it will want the profile to be completed and it will create a new account. You will be emailed an authorization code you will need to use the first time you log in.

The screenshot shows the 'Welcome to Taxpayer Access Point (TAP)' page on the Montana Department of Revenue website. The page features a navigation menu on the left and a main content area with several service categories and a login section.

Navigation Menu:

- Home
- Back
- Help
- TAS Toggle Log
- RunDate: 04-Sep-2014
- Last Request: 21ms

Main Content Area:

- Individual**
  - File a Return
  - Retrieve a Saved Return
  - Make a Payment
  - Where's My Refund
  - Add Power of Attorney
  - Login Features
- Business**
  - Add Power of Attorney
  - Request Account ID
  - File PT-AGR
  - File PT-STM
  - Tax Certificate Application
  - Login Features
- Unclaimed Property** (Click for cash)
  - Search for Unclaimed Cash
  - Retrieve a Saved Claim
  - Track Your Claim Status
  - Quick Claim Letter
  - What You Will Need
- Liquor**
  - Liquor Pricing Calculators
  - License Search
  - Server Training
  - Retrieve a Saved Application
  - Beer/Wine Label Search

LOGIN section:

- Forgot my Password
- Username: taptester1
- Password: [masked]
- Login button
- Authorization Code: mzb8p (circled in red)

SIGN UP FOR ACCOUNT ACCESS section:

- Benefits of Signing Up
- Who Can Use TAP Login?
- Tax Types Available on TAP
- Sign up Now! button

## Combined Applications

Once you log in you will see the following listing of accounts and information.

The screenshot displays the Taxpayer Access Point (TAS) interface for the Montana Department of Revenue. The header includes the state seal and the text "Taxpayer Access Point MTS" and "Montana Department of Revenue".

**Menu** (Log Off): Home, Back, Help

**TAS** (Toggle Log): RunDate: 03-Sep-2014, Last Request: 221ms

**View My Profile**: Add Access to Another Account, Liquor and Gambling Apps/Forms, Pay Liquor Gambling Fees

**GCD TEST CASINO**

| MONTANA TAX INFORMATION |         | NAMES AND ADDRESSES |                             |
|-------------------------|---------|---------------------|-----------------------------|
| Montana Tax Number      | 6608272 | Legal Name          | GCD TEST CASINO             |
| Balance                 | \$0.00  | DBA Name            |                             |
|                         |         | Location Address    | 555 5TH AVE HELENA MT 59601 |
|                         |         | Mailing Address     |                             |

**ACCOUNTS<sup>2</sup>** | **REQUESTS<sup>0</sup>** | **WEB MESSAGING<sup>0</sup>** | **LETTERS<sup>0</sup>**

**MY ACCOUNTS<sup>2</sup>**

| MY ACCOUNTS     |              |                 |              |                             |         | Hide History | Filter |
|-----------------|--------------|-----------------|--------------|-----------------------------|---------|--------------|--------|
| Account ID      | Account Type | Name            | Frequency    | Address                     | Balance |              |        |
| 6608272-002-GOA | Gambling Op. | GCD TEST CASINO | Fiscal       | 555 5TH AVE HELENA MT 59601 | 0.00    |              |        |
| 6608272-003-ONP | On-Prem Cons | GCD TEST CASINO | ONP - Fiscal | 555 5TH AVE HELENA MT 59601 | 0.00    |              |        |

On the left hand side you can see different options to choose from. If you would like to apply for a new liquor and/or gambling license or make changes to the existing click on "Liquor and Gambling Apps/Forms".

This screenshot is identical to the one above, but with the "Liquor and Gambling Apps/Forms" link in the left-hand navigation menu circled in red.

For Category you will choose "Retail" in the drop down. For Application you can choose the Form 5 Liquor/Gambling License Application as shown below or the Form 37 or 39. Click continue when you made your choice.

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Menu Log Off

Home  
Back  
Help

TAS Toggle Log

RunDate: 04-Sep-2014  
Last Request: 426ms

### Liquor and Gambling Applications

→ Category Retail

→ Application Liquor/Gambling License App

Continue

You will be taken to the start of the application. Read the information on the first page of the application and choose "Next".

Taxpayer Access Point  
MTS

Montana Department of Revenue

Menu Log Off

Home  
Back  
Help

TAS Toggle Log

RunDate: 04-Sep-2014  
Last Request: 1244ms

Attachments Add

### Combined Liquor & Gambling License Application

Previous Message **Next** Save and Finish Later Cancel

Thank you for choosing Montana Taxpayer Access Point (TAP) to apply for your liquor and/or gambling license. Before you begin, we would like to briefly explain some of the items on the application.

**FEES** – The applicable fees for the application are determined by the selections you make as you fill out the application. When you finish the application, you will be able to review a list of all applicable fees.

**PAYMENT** – Applicants are encouraged to pay application fees with a credit card or electronic check. Paying with an electronic check is free. There is, however, a service charge for credit card payments. We also accept physical checks. You will need to include a voucher when you mail us the check. You can print the voucher at the end of the application process.

**SUPPORTING DOCUMENTS** – For us to process an application, you will need to provide various supporting documents. The types and numbers of documents you'll need to provide depend on your responses on the application. After filling out the application, you'll receive a list of all documents you'll need to electronically attach to the application.

**SAVING** – Please remember that after 45 minutes of inactivity on TAP, applicants will need to log back in. Any unsaved work will be lost. We therefore encourage you to save your work often. Once you save your application, you can continue working on it at a later time.

**FINGERPRINT CARDS** – After filling out the application, you'll receive a list of individuals who will each need to provide two sets of fingerprint cards. You may contact us at the number below to obtain the fingerprint cards. Once you receive the cards, please contact your local law enforcement agency to help you and the other individuals complete them. Make sure to send the cards with the fingerprint card voucher available for print at the end of the application process.

Please do not hesitate to contact our office at 406-444-1971 if you have any questions with the application process.

You will continue on to complete the application and attach the corresponding documentation on the attachments page, complete the declaration and authorization statement and submit for processing. Should you have any questions regarding this process or need assistance call Gambling Control Division at (406) 444-1971.

## Short Forms

Also available is the Form 37 and Form 39 to choose from the application drop down.

### Short Form 37

Previous

Form 37

Next

Save and Finish Later

Cancel

### State of Montana Form 37 Liquor and Gambling Short Form

The use of this short application is limited to:

- Change in ownership due to the death of a licensee and a transfer of ownership interest to an estate, or a joint tenant with right of survivorship
- Transfer of interest resulting from divorce if the spouse to whom the interest is transferred is already identified as an owner of the license
- Transfer of ownership resulting from a foreclosure
- Transfer of ownership by gifting if the person to whom the interest is transferred is already identified as an owner of the license
- Transfer of ownership by sale if the person to whom the interest is sold is already identified as an owner of the license

In addition, transfers under any of the above circumstances must be to a person already disclosed in a liquor only or combined application owning at least 10% of the license.

**NOTE: An ownership interest in a licensed gambling and/or liquor operation may not be transferred to a complete stranger to the license (someone not already listed and approved as an owner) unless a new Alcoholic Beverage/Gambling Operator Combined License Application (Form 5) reflecting the proposed transfer is sent to and approved by the divisions.**

[Click here for a checklist of the documents and information that will be required for each transaction type.](#)

### Check the Appropriate Box to Designate the Purpose of this Application

- Death of a Licensee  Divorce among Licensees  Sale among Licensees  
 Foreclosure  Gifting among Licensees

Explain briefly the reason for this application:

### Fees

Processing Fee: \$200 for Foreclosure **ONLY**

Fingerprint Fee: \$27.25 per set (two) when required. (See individual transaction type.)

### General Information

Is this change for a Gambling Only license?

ONP Account ID:

GOA Account ID:

FEIN

Liquor License No.

Name of Licensee

Business/Trade Name

Business Phone

Cell Phone

Email Address

Address of Licensed Premises

Street Address

Mailing Address

Mailing Address is the same as the Business Address

Street Address

## GOA Permits

It is possible to apply for Special Permits and do account maintenance on the TAP Accounts. From the home page click on the account ID in blue for the account you wish to submit a request for.

The screenshot shows the Taxpayer Access Point (TAP) interface for the Montana Department of Revenue. The main header includes the Montana Department of Revenue logo and the text "Taxpayer Access Point MTS". The left sidebar contains navigation options: Menu (Home, Back, Help), TAS (Toggle Log, RunDate: 05-Sep-2014, Last Request: 469ms), and View My Profile (Add Access to Another Account, Liquor and Gambling Apps/Forms, Pay Liquor Gambling Fees). The main content area displays account information for "GCD TEST CASINO". Under "MY ACCOUNTS", a table lists two accounts: "6608272-002-GOA" (Gambling Op.) and "6608272-002-ONP" (On-Prem Cons). The "6608272-002-GOA" account ID is circled in red.

| Account ID      | Account Type | Name            | Frequency    | Address                     | Balance |
|-----------------|--------------|-----------------|--------------|-----------------------------|---------|
| 6608272-002-GOA | Gambling Op. | GCD TEST CASINO | Fiscal       | 555 5TH AVE HELENA MT 59601 | 0.00    |
| 6608272-002-ONP | On-Prem Cons | GCD TEST CASINO | ONP - Fiscal | 555 5TH AVE HELENA MT 59601 | 0.00    |

On the left hand side you will see where you can request account changes, or permits. The VGM link is not available for use at this time. Click on "GOA Permits".

The screenshot shows the Taxpayer Access Point (TAP) interface for the Montana Department of Revenue, displaying account details for "GAMBLING OPERATOR". The left sidebar contains navigation options: Menu (Home, Back, Help), TAS (Toggle Log, RunDate: 05-Sep-2014, Last Request: 70ms), and Request GOA Account Changes (GOA Permits, VGM Services, Detail). The "GOA Permits" link is circled in red. The main content area displays account information for "GAMBLING OPERATOR". Under "PERIODS", a table lists "ATTENTION NEEDED" for the period "30-Jun-2015".

| Period      | Request Status | Tax  | Penalty | Interest | Credits | Balance | Messages       |
|-------------|----------------|------|---------|----------|---------|---------|----------------|
| 30-Jun-2015 | Pay            | 0.00 | 0.00    | 0.00     | 0.00    | 0.00    | After Deadline |

Choose "Request a Card Table Permit".

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Menu Log Off  
Home  
Back  
Help

TAS Toggle Log  
RunDate: 05-Sep-2014  
Last Request: 359ms

Attachments Add

**Gambling Permits**

Previous **Permits** Next

Save and Finish Later Cancel

Account ID: 6608272-002-GOA

Account Name: GCD TEST CASINO

No changes made

**Request a Card Table Permit**

Request a Small Stakes Card Tournament Permit

Request a Large Stakes Card Tournament Permit

Request a Keno/Bingo Permit

If you choose "Yes" the following fields are required to complete. Notice: You must select the ONP account for the liquor license the gambling license is associated with.

Card Table Permits

**Live Card Table Application**

Selected Administrative Rule Excerpt

To obtain a complete copy of the rules and statutes, visit our website at [www.dojmt.gov](http://www.dojmt.gov)

Mont. Code Ann. §23-5-306 (1)(a) A person who has been granted an operator's license under 23-5-177 and a license to sell alcoholic beverages for consumption on the premises may be granted an annual permit for the placement of live card game tables.

Mont. Admin. R.23.16.1201(7) 'Card Table' or 'live card game table' means a table licensed by the department on which no more than one authorized card game is played at a time.

Would you like to request a Card Table Permit? Yes No

**Click here to select associated ONP Account**

Gambling Operator Account Number: 6608272-002-GOA

Liquor License Number: [ ]

Federal Tax ID No. [ ] Re-Enter FEIN [ ]

Establishment Name [ ] **Required**

Operator Holder of O [ ] Format: \_\_-\_\_

Establishment Phone Number [ ] Email Address [ ]

Street Address: 555 5TH AVE

Street Address2 [ ]

Unit Type [ ] Unit [ ]

City: HELENA

State: MT Zip: 59601

How many card tables do you wish to license?

Number of tables: 0

Existing Table Permit:

OK Cancel

Once the required fields are completed and an ONP account is entered click ok.

Card Table Permits

### Live Card Table Application

**Selected Administrative Rule Excerpt**  
To obtain a complete copy of the rules and statutes, visit our website at [www.dojmt.gov](http://www.dojmt.gov)

Mont. Code Ann. §23-5-306 (1)(a) A person who has been granted an operator's license under 23-5-177 and a license to sell alcoholic beverages for consumption on the premises may be granted an annual permit for the placement of live card game tables.

Mont. Admin. R.23.16.1201(7) 'Card Table' or 'live card game table' means a table licensed by the department on which no more than one authorized card game is played at a time.

Would you like to request a Card Table Permit?  Yes  No

---

[Click here to select associated ONP Account](#)

|                                      |                       |                               |       |
|--------------------------------------|-----------------------|-------------------------------|-------|
| Gambling Operator Account Number     | Liquor License Number | Establishment Mailing Address |       |
| 6608272-002-GOA                      | 01-234-5678-910       | Street Address                |       |
| Federal Tax ID No.                   | Re-Enter FEIN         | 555 5TH AVE                   |       |
| **_***6789                           | **_***6789            | Street Address2               |       |
| Establishment Name                   |                       | Unit Type                     | Unit  |
| GCD TEST                             |                       |                               |       |
| Operator: Holder of Operator License |                       | City                          |       |
| GCD TEST                             |                       | HELENA                        |       |
| Establishment Phone Number           | Email Address         | State                         | Zip   |
| (406) 444-4444                       | gcdtest@mt.gov        | MT                            | 59601 |

How many card tables do you wish to license?  
Number of tables:   
Existing Table Permit:

The next screen will show what permit is being requested and it can either be submitted or saved to be submitted at a later date. Click on “Next”.

The screenshot shows the 'Gambling Permits' page. At the top, it says 'Taxpayer Access Point MTS' and 'Montana Department of Revenue'. On the left is a navigation menu with 'Menu', 'Home', 'Back', 'Help', 'TAS', 'RunDate: 05-Sep-2014', 'Last Request: 735ms', and 'Attachments'. The main content area has a breadcrumb trail: 'Previous' > 'Permits' > 'Next'. The 'Next' button is circled in red. Below the breadcrumb are buttons for 'Save and Finish Later' and 'Cancel'. The form contains 'Account ID: 6608272-002-GOA' and 'Account Name: GCD TEST CASINO'. A green checkmark is next to the text 'Request a Card Table Permit'. Below it are links for 'Request a Small Stakes Card Tournament Permit', 'Request a Large Stakes Card Tournament Permit', and 'Request a Keno/Bingo Permit'.

The fee owed for this permit is shown on the next page or if multiple permits are requested at the same time the name of each permit and permit fee and total of all will be displayed. Click on “Next” again.

The screenshot shows the 'Summary of Fees Due' page. It has the same header and navigation menu as the previous screen. The breadcrumb trail is 'Previous' > '1' > 'Fee Summary' > 'Next'. The 'Next' button is circled in red. There are buttons for 'Save and Finish Later' and 'Cancel'. The 'Summary of Fees Due' section shows 'Card Table Fee: 250.00' and 'Total Fee: 250.00'.

Useful if any attachments are required the next screen will give you an opportunity to attach any documents needing to be submitted. Click on "Next" again once all required attachments are attached.

The screenshot shows the Montana Department of Revenue Taxpayer Access Point (TAS) interface. The header includes the state seal and the text "Taxpayer Access Point MTS" and "Montana Department of Revenue". The main content area is titled "Gambling Permits". Below the title, there is a navigation bar with buttons for "Previous", "1", "2", "Attachments", and "Next". The "Next" button is circled in red. To the right of the navigation bar are buttons for "Save and Finish Later" and "Cancel". Below the navigation bar, there is a text prompt: "Please attach any relevant documents to assist in the processing of this request." and a button labeled "Add Attachments". On the left side, there is a sidebar menu with options: "Menu" (with "Log Off" link), "Home", "Back", "Help", "TAS" (with "Toggle Log" link), "RunDate: 05-Sep-2014", "Last Request: 63ms", and "Attachments" (with "Add" link).

Read the disclosure and check the box and electronically sign if you agree to the disclosure and choose "Submit".

The screenshot shows the 'Taxpayer Access Point MTS' interface for the Montana Department of Revenue. The page title is 'Gambling Permits'. On the left sidebar, there are navigation options: 'Menu' (Home, Back, Help), 'TAS' (Toggle Log, RunDate: 05-Sep-2014, Last Request: 566ms), and 'Attachments' (Add). The main content area has a progress bar with steps 1, 2, 3, 'Authorization', 'Next', and 'Submit'. The 'Submit' button is circled in red. Below the progress bar is a disclosure statement: 'I affirm I am authorized to make this application for the applicant and that the answers contained herein are true and complete. If this application or attachments contain false information, I understand I may be subject to the criminal penalties of Mont. Code Ann. 45-7-202, 45-7-203, 45-7-208, and/or revocation of any gambling licenses granted pursuant to this application.' Below the disclosure is a checked checkbox with the text 'By checking this box, I agree to the above statement'. There are two input fields: 'Full Name of Licensee/Authorized Agent' containing 'GCD TESTER' and 'Date' containing '05-Sep-2014'.

The account password is required to be submitted. Enter the account password and click "OK".

This screenshot shows the same 'Gambling Permits' application page as the previous one, but with a modal dialog box overlaid. The dialog box contains the text: 'You are required to re-enter your password to verify this request. Your password will act as your signature.' Below this text is a password input field with a green background and a redacted password '.....'. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'. The 'OK' button is circled in red. The background application page is partially obscured by the dialog box.

Once the request is submitted to the Division you must pay online for the permit requested if there are fees due for the permit requested. Click on "Proceed to Pay Online". The same can be done for each permit available for online submittal.

## Account Changes

You can also choose to submit changes to your GOA account by choosing "Request GOA Account Changes" on the list.

The screenshot shows the Montana Department of Revenue Taxpayer Access Point (TAS) interface. The main content area is titled "GAMBLING OPERATOR" and "NAMES AND ADDRESSES". It displays account information for Acct Id 6608272-002-GOA, Filing Frequency Yearly - Fiscal, and Payment Source Setup. The DBA Name is GCD TEST CASINO, and the Mailing Address is 555 5TH AVE HELENA MT 59601. The account balance is 250.00, with pending payments and returns of 0.00. A table below shows a period requiring attention for 30-Jun-2015 with a tax amount of 250.00 and a status of "Pay". The "Request GOA Account Changes" link in the left sidebar is circled in red.

| Period      | Request Status | Tax    | Penalty | Interest | Credits | Balance | Messages       |
|-------------|----------------|--------|---------|----------|---------|---------|----------------|
| 30-Jun-2015 |                | 250.00 | 0.00    | 0.00     | 0.00    | 250.00  | After Deadline |

Below is a list of documents or changes available for request and submittal.

The screenshot shows the Montana Department of Revenue Taxpayer Access Point (TAS) interface for "Gambling Operator License, Online Account Maintenance". The page title is "Gambling Operator License, Online Account Maintenance". It features navigation buttons for "Previous", "Summary View", "Next", "Save and Finish Later", and "Cancel". The main content area contains the text "Use the links below to indicate the changes you would like to make to your Gambling Operator account." and a list of available actions:

- [Request a license account DBA Name change](#)
- [Request an Owning Entity name change](#)
- [Request an account Mailing Address change](#)
- [Add Lease/Loan Documents](#)
- [Request to Add/Remove Managers, Officers, or Directors](#)
- [Change Manager information](#)
- [Change Officer information](#)
- [Change Director information](#)