Adding an authorized E-File agent

Organization NorthSTAR Administrators can be viewed under the Organization Details page Organization Detail - NorthSTAR

Security Assignments are controlled under the Security of the Person Details page. Person Detail - NorthSTAR

If you do not have the NorthSTAR Administrator role you will not see the "Security" dropdown option.

NorthSTAR Administrator will check the box for External E-File Production Submitter and assign role to authorized agents.



Internal Security Assignments.

☐ Internal Compliance User
☐ Internal E-File Production Manager
☐ Internal E-File Production Reviewer
☐ Internal Entity Commenter

External Security Assignments.

Entity Read Only
☐ Entity Submitter
☐ External E-File Production Submitte
☐ External Facility Sundry Manager
External Facility Sundry Read Only