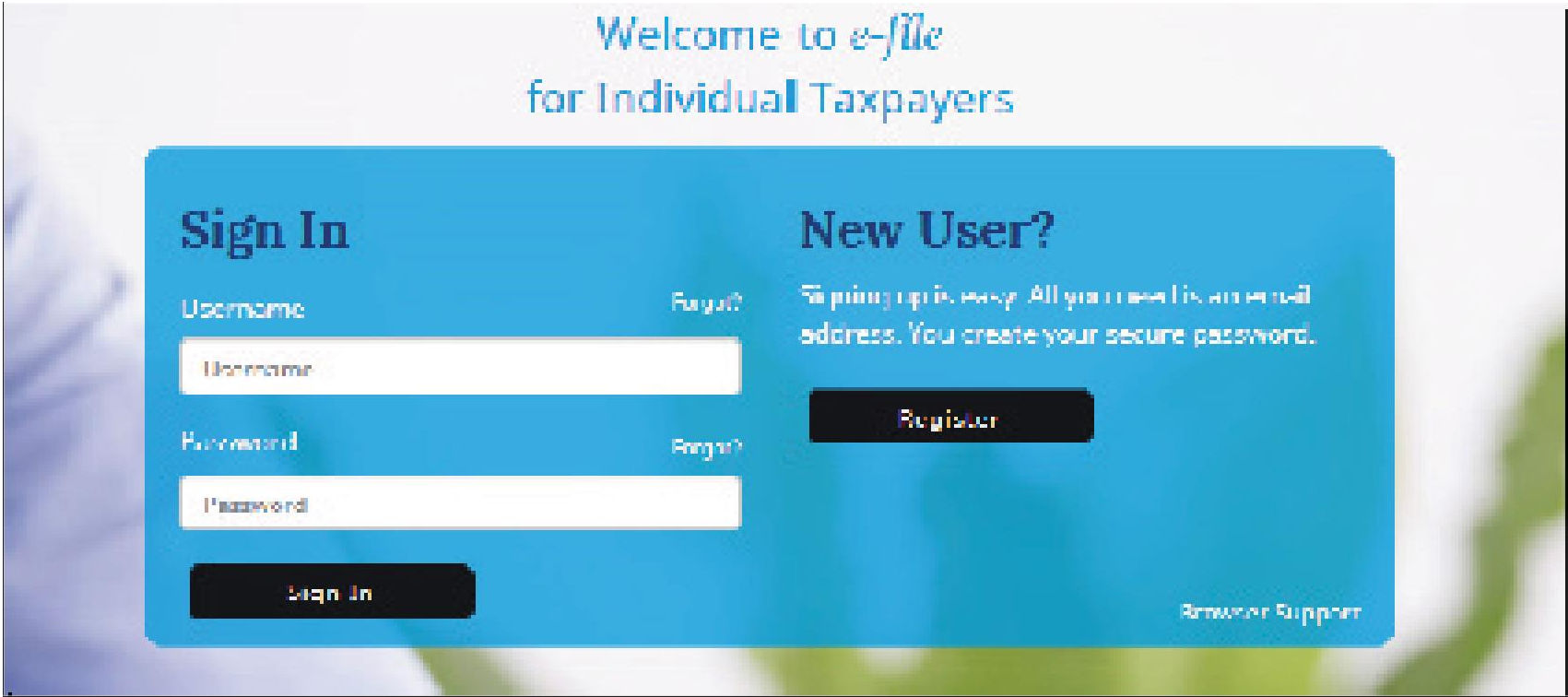


# e-file User Guide

## Online Filing



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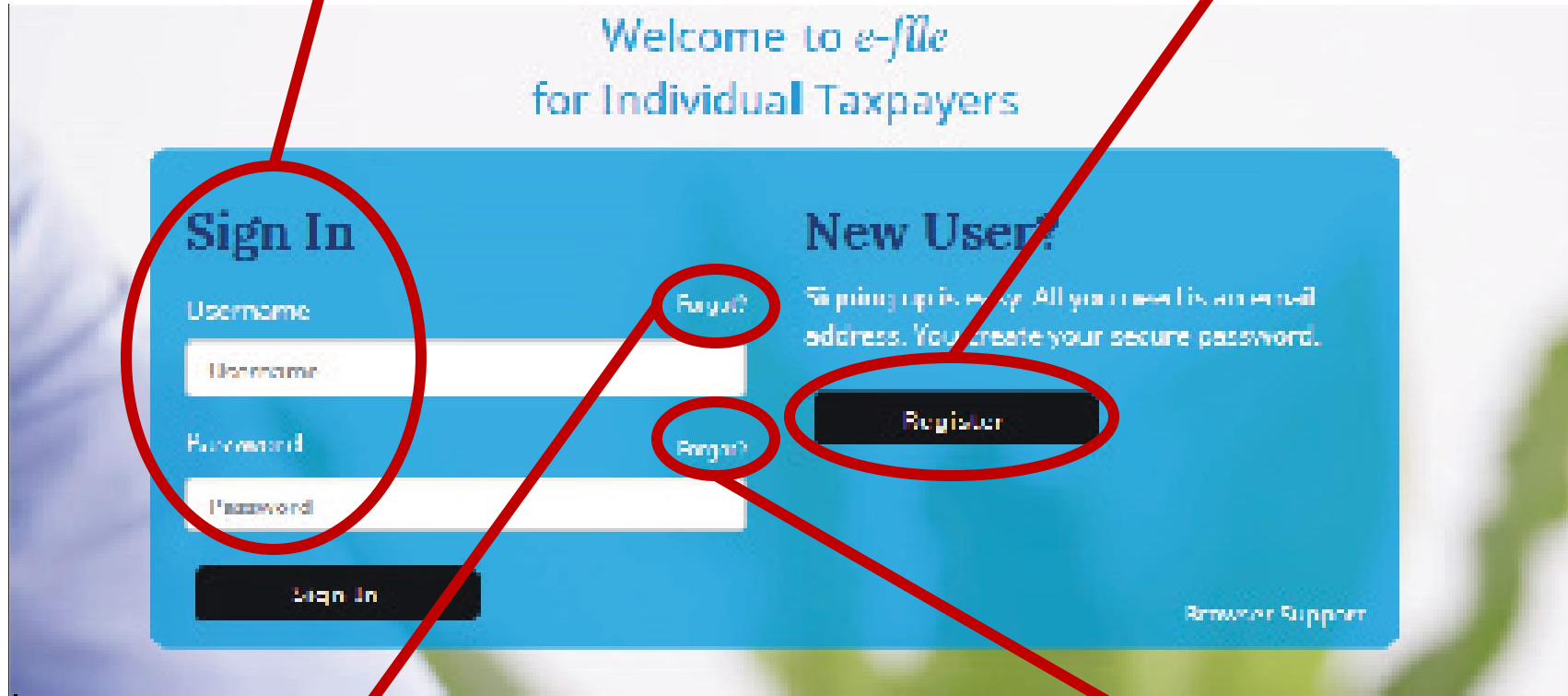


# Sign In

if you have an existing account.

# Register

if you are new to e-file.



## Forgot Username?

Your username can be different from your email. If you are having trouble signing in after resetting your password, check your username.

## Forgot Password?

If your account is locked or if you forgot your password, send a reset link to the email connected to the account.

# File Earned

## Income Tax Return

Select "Return."

# Profile

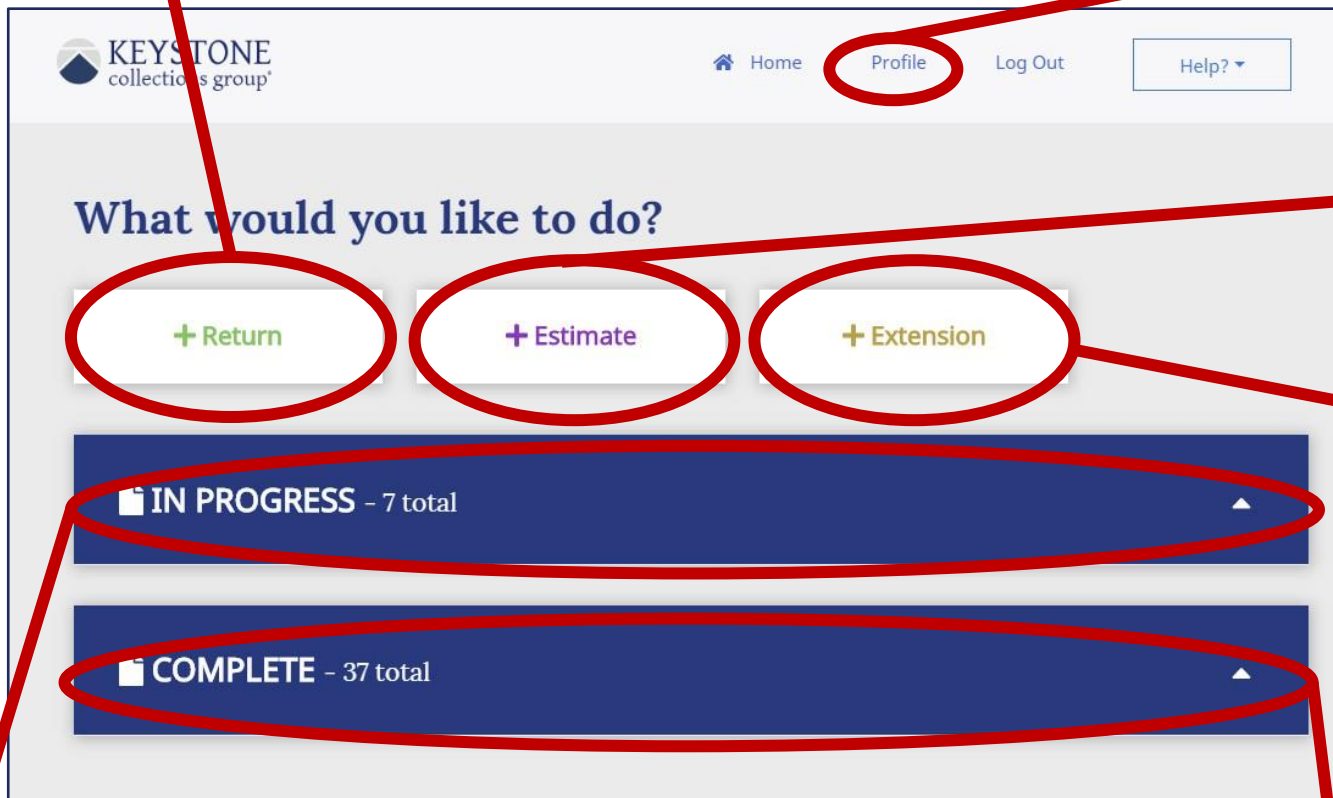
Update email address, name, address and other details.  
**Note:** You cannot change your username. You can create a new account with a new username and email.

# Estimate

Make Quarterly Estimated Payments if you are self-pay.

# Extension

File for an extension on the filing return due date.



# In Progress

See all unfinished filings. These can be continued or deleted.

# Complete

View all finished/ filed returns within the account.

# Filing Method

Select "File Online" for the automated e-file System

**Select Filing Method - Tax Return**

How would you like to file?

**File Online**

Select **File Online** to:

- Use automated system to complete return filing
- Receive refund via US mail or direct deposit
- If you worked outside of the United States or are a foreign national with a work visa, submit using DocAttach<sup>SM</sup>.

**DocAttach<sup>SM</sup> Forms**

Select **DocAttach<sup>SM</sup> Forms** to:

- Upload completed local earned income tax return and supporting documents
- Receive refund via US mail
- Not available if you moved from another municipality during the year.

[Back to Home](#)

# Income & Deductions — Forms

**Income & Deductions - Forms**

Keese Tone

+ Add W2 or Other Form for C SEXTON

Spouse Help

Back to Home

Keese Tone

**Use the same form(s) to report earned income on PA state income tax return (PA-40)**

**Select an Income/Deduction Form to Add**

Select an Income or Deduction Form. Payments and Credits will be entered later.

- W-2
- 1099-MISC
- 1099-NEC
- Schedule C / C-EZ
- Schedule UE
- Military Exemption
- 1099-R
- Schedule F
- Other Taxable Income
- Schedule RK-1

[The form C and its not included in this list](#)

Close

## W-2s:

- Wage income from employment
- Income other than wages and net profits (contract pay)

## 1099 Misc

## Schedule C/C-EZ

- Income from self-employment or sole proprietorship

## Schedule UE

- Unreimbursed employee business expenses
- Union dues, uniforms, use of personal car, etc.

## Military Exemption (RADDP)

- Income from active service or military encampment

## 1099 R

- Early withdrawal from IRA, 401(k) or other plan

## Schedule F

- Profit or loss from farming

## Other Taxable Income

- Income not reported on W2, Schedule C or 1099 Misc

- May include 1099K income

## Schedule RK-1

- Subchapter S Corp. "Pass-Through Income"
- Partnerships, LLCs, etc.
- Guaranteed payments

# W-2 — Multiple Work Locations

## Multiple lines on W-2

- Some employers report local wages based on different workplace locations
- *e-file* lets taxpayer report wages and local tax withholding based on employer W 2 detail
- Workplace location (non-resident) tax rates may differ
- Workplace locations may be served by separate Tax Officers

b. FEIN	99-1234567	Employer Name	AAA Construction LLC		
Start Date	01/01/2018	End Date	01/01/2018		
<b>Special Cases</b>					
Box 10. Dependent Care Benefits (DeCAP)?	<input type="radio"/> Yes <input checked="" type="radio"/> No				
Box 13. Is Third Party Sick Pay checked?	<input type="radio"/> Yes <input checked="" type="radio"/> No				
Box 14. Clergy Housing Allowance?	<input type="radio"/> Yes <input checked="" type="radio"/> No				
<b>15. State</b>	<b>16. State Wages</b>	<b>17. State Withholding</b>	<b>18. Local Wages</b>	<b>19. Local Income Tax</b>	<b>20. Locality</b>
PA	33434.20	Not Needed	16230.24	284.05	720501
PA		Not Needed	17203.94	172.04	720701
<b>+ ADD ANOTHER LINE</b>					
Back		Next			

## Multiple work location examples

- Substitute teachers who work in different municipalities within a school district.
- Temp agency employees assigned to a variety of companies during the tax year.
- Construction workers who work for the same employer at multiple job sites.

*By law, employers report EIT withholding to the workplace location Tax Officer (see box 20)*



# W-2 — Two Residences, One Employer

*e-file* pro-rates

- Earned income
- Employer withholding
- EIT liability

by resident taxing jurisdiction

b. FEIN	16. State Wages	19. Local Income Tax	20. Locality
11-1111111	27000.00	270.00	30
<a href="#">+ ADD ANOTHER LINE</a>			
<a href="#">Back</a>		<a href="#">Next</a>	



Some employers do not apportion earnings and withholding by multiple resident locations

Employment - Keese Tone

b. FEIN	11-1111111	Employer Name	Boring Test Services, Inc		
Start Date	01/01/2018	End Date	12/31/2018		
<b>Special Cases</b>					
Box 10. Dependent Care Benefits (DeCAP)?	<input type="radio"/> Yes <input checked="" type="radio"/> No				
Box 13. Is Third Party Sick Pay checked?	<input type="radio"/> Yes <input checked="" type="radio"/> No				
Box 14. Clergy Housing Allowance?	<input type="radio"/> Yes <input checked="" type="radio"/> No				
15. State	16. State Wages	17. State Withholding	18. Local Wages	19. Local Income Tax	20. Locality
PA	14620.52	Not Needed	9747.32	97.47	30
PA	14620.52	Not Needed	4873.98	68.23	30 <a href="#">Remove</a>
<a href="#">+ ADD ANOTHER LINE</a>					
<a href="#">Back</a>		<a href="#">Next</a>			

Some employers will apportion earnings and withholding by multiple resident locations





# Schedule RK-1

Select an Income/Deduction Form to Add

W-2	1099 Misc	Schedule C / C - EZ
Schedule UE	Military Exemption	1099 R
Schedule F	Other Taxable Income	<b>Schedule RK1</b>

Close

## Income from Sub S, Partnership, LLC

### Pass-through Income

- Taxable
- Losses may offset net profit from another business entity

### Passive Income

- Non-taxable

Losses may not offset net profit from another business entity

Income & Deductions - Schedule RK1

Entity Name

FEIN

FEIN2

Entity Type

Partner Type

1. Business Income

Is Loss:  Yes  No

12. Guaranteed Payments for Service

13. Guaranteed Payments to Retired Partner

Start Date

End Date


Back Next

## Federal Form K-1

- When 'Entity Type' is LLC, Form K-1 pops up
- Supply figure from Line 14 of Form K-1  
*(self-employment earnings, whether profit or loss)*

# Income & Deductions - Summary Forms

## Income & Deductions - Forms

  
Add W2 or Other Form for  
... Keese Tone ...  
[Help](#)


W2		2018
Employer	MILLERSBURG AREA SCHOOL DISTRICT	
Taxable Income	\$60,329.93	
<a href="#">Delete</a>	<a href="#">Edit</a>	

W2		2018
Employer	Test Boring Services Inc	
Taxable Income	\$14,620.52	
<a href="#">Delete</a>	<a href="#">Edit</a>	

Schedule UE		2018
Employer	MILLERSBURG AREA SCHOOL DISTRICT	
Expenses	\$978.00	
<a href="#">Delete</a>	<a href="#">Edit</a>	

[Back to Home](#)

### Summary

- *e-file* provides summaries of the information the taxpayer enters on each form selected to file a local tax return
- Filer is responsible for the accuracy of the data
- Click  Edit to make changes/corrections. Add forms when needed.

[Review Income](#)

# Confirm W-2 Withholding

One employer

Income & Deductions – W2 Withholding

Keese Tone

Tony Tone

15. State	16. State Wages	18. Local Wages	19. Local Withholding	20. Locality	Withholding Type
P/	82826.63	82826.63	1035.33	150305	Local Income Ta

Back Confirm

*This step is required*

- Confirm correct information was entered
- Drop-down menu used to confirm withholding type
- Tool tip defines withholding type

### Withholding Types

**Local Income Tax**  
Earned income tax due to your resident taxing jurisdiction. The amount shown may not equal the figure in W2 (Box 19) if your workplace location imposes a non-resident tax at a different rate.

**Out of State**  
Tax withheld to another state or to an out-of-state local taxing jurisdiction.

**Other Tax**  
No credit is provided for any tax that does not represent local PA earned income tax, or out-of-state income tax.

**Philadelphia**  
Tax withheld to a Philadelphia workplace location that is credited toward your local earned income tax. The credit cannot exceed your total local tax liability and is not transferrable to your spouse.

Close

Multiple employers

Income & Deductions – W2 Withholding

15. State	16. State Wages	18. Local Wages	19. Local Withholding	20. Locality	Withholding Type
P/	60329.93	60329.93	603.95	22	Local Income Ta
P/	14620.52	14620.52	100.00	22	Local Income Ta

Back Confirm

# W-2 Withholding Worksheet

## Income & Deductions – W2 Withholding Worksheet

Other tax withheld: \$52.00

### W2 Withholding Worksheet

WASHINGTON TOWNSHIP	
Tax Year: 2018	
Tax Rate: 1.00%	
Income	\$74,950.45
Resident Liability	\$749.51
Resident Withholding	\$703.30
Non-Resident Withholding <a href="#">?</a>	\$0.00
Additional Resident Withholding <a href="#">What's this?</a>	<input type="text" value="0.00"/>

[← Back](#)

- Provides opportunity to review information entered from the W-2 to report earned income and EIT withholding.
- In this example, filer entered an additional \$52 in withholding. *e-file* does not recognize this as either resident or non-resident withholding, based on what the filer reported as the resident and workplace locations.
- Some employers include LST in the wrong place on the W2
  - LST is not refundable through the EIT tax return process
- If filer believes this \$52 is EIT withheld by the employer:
  - Taxpayer may use the Additional Resident Withholding box.
- All tax returns are subject to review.

# W-2 Withholding Worksheet

## What's this?

- If there is additional local tax withholding on the W2 that is not reflected on this page, enter it in the Additional Resident Withholding field.
- Taxpayers are not entitled to a refund for workplace location (non-resident) withholding.
- No refund is available here for other local taxes, such as for the Local Services Tax.

## Income & Deductions – W2 Withholding Worksheet

Other tax withheld: \$52.00

WASHINGTON TOWNSHIP	
Tax Year: 2018	
Tax Rate: 1.00%	
Income	\$74,950.45
Resident Liability	\$749.51
Resident Withholding	\$703.30
Non-Resident Withholding ?	\$0.00
Additional Resident Withholding	<input type="text" value="0.00"/>
<a href="#">What's this?</a>	

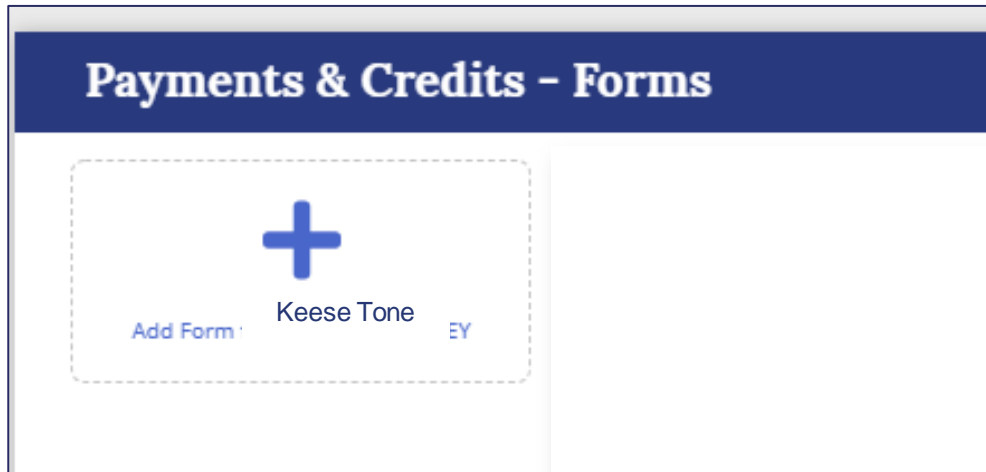
[← Back](#)

## Non-Resident Withholding



- If the jurisdiction where you work has a commuter or workplace location (non-resident) tax rate that is higher than the rate where you live (resident rate), your employer is required to withhold at the higher of the two rates.
- Non-Resident taxes are not refundable.

# Payments & Credits — Forms



## Schedule G-L

- PA form used to report income tax paid out of state

## Municipal Tax Credit

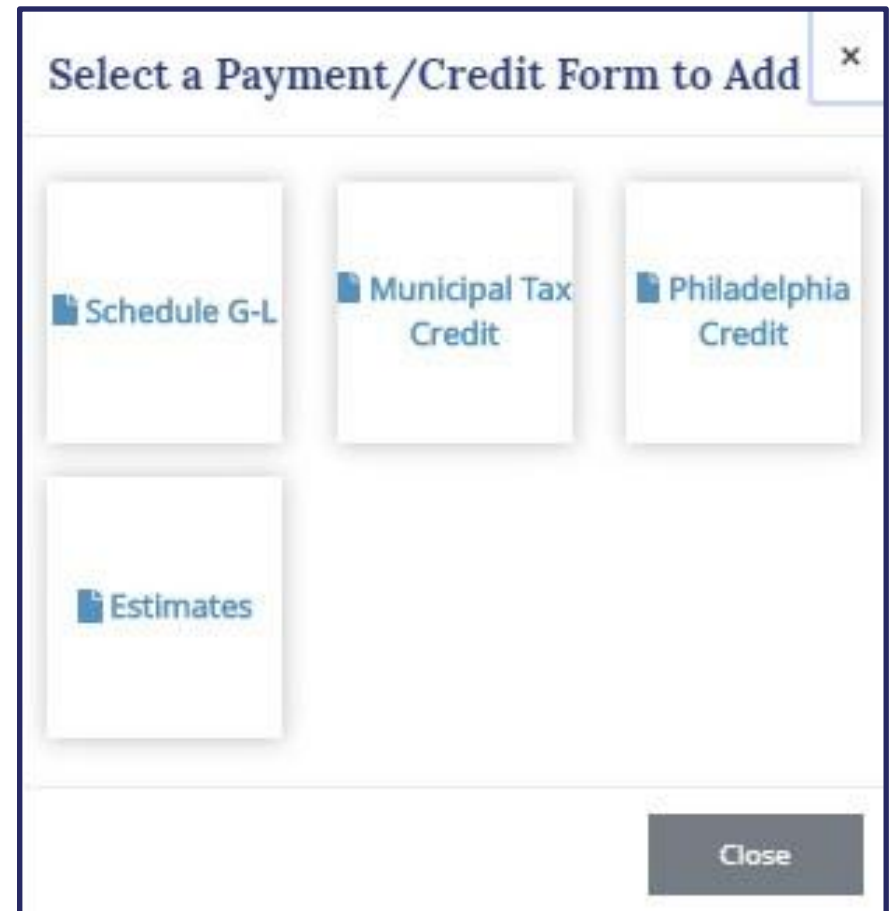
- Report income tax paid to out-of-state municipality

## Philadelphia Credit

- Report tax paid to the City of Philadelphia

## Estimates

- Report quarterly estimate tax payments for current year
- Report prior-year overpayment credited to the current tax year



# Philadelphia Credit

Filer Information    Income & Deductions    **Payments & Credits**    Final Review

## Payments & Credits - Philadelphia Credits Worksheet

KEESE TONE

Total W2 Wages	\$175,000.00
W2 Wages Taxed in Philadelphia	<input type="text" value="100000.00"/>
W2 Wages Not Taxed In Philadelphia	\$75,000.00
Employee Business Expenses Deducted from Philadelphia wages	<input type="text" value="0.00"/>
Net Profit and Other Taxable Income Taxed in Philadelphia	<input type="text" value="0.00"/>
Total Income Taxed in Philadelphia	\$100,000.00
Local Income Tax Paid to Philadelphia	<input type="text" value="3456.70"/>

## Income tax paid to Philadelphia

- Philadelphia imposes a 3.4567% "commuter" or non-resident wage tax
- Tax paid to Philadelphia may be used to offset
  - EIT liability
- The credit may not:
  - Exceed local tax liability
  - Be transferred to spouse
  - Be applied to next year's tax liability

Select a Payment/Credit Form to Add

<input type="button" value="Schedule G-L"/>	<input type="button" value="Municipal Tax Credit"/>	<input type="button" value="Philadelphia Credit"/>
<input type="button" value="Estimates"/>		



# Balance Due — Payment Information

## Enter Your Payment Information Step 1 of 3

Item Description	Total Amount
2018 Final Return - KEESE TONE	(\$86.00)
2018 Final Return - TONY TONE	\$114.00
Subtotal	\$28.00

Payment Method

← Back

Confirm →

## Payment method

Schedule a direct payment from bank account (ACH) Pay  
by credit card

# Return Is Not Final With Unpaid Balance Due

What would you like to do?

[+ Return](#) [+ Estimate](#) [+ Extension](#)

**IN PROGRESS** - 1 total

Filters: Type Status

TAX RETURN	
KEESE TONE	
Tax Year	2018
Status	Payment Required
ASHLAND TOWNSHIP	
<a href="#">Continue</a>	

Return will not move from  
IN PROGRESS  
to COMPLETE  
until the taxpayer pays  
online  
or  
schedules online payment

When submitting your return, you must make or schedule payment.

Total Payment Due must be paid on or before April 15<sup>th</sup> (or next business day).

Late payments may be subject to statutory penalty, interest and Act 192 costs.