

e-file User Guide

Online Filing

Welcome to *e-file* for Individual Taxpayers

Sign In

Username [Forgot Username?](#)

Password [Forgot Password?](#)

New User?

Signing up is easy. All you need is an email address. You create your secure password.

[Browser Support](#)



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Sign In

if you have an existing account.

Register

if you are new to e-file.

Welcome to *e-file* for Individual Taxpayers

Sign In

Username
Username

Password
Password

Sign In

New User?

Signing up is easy. All you need is an email address. You create your secure password.

[Forgot Username?](#)

[Forgot Password?](#)

Register

[Browser Support](#)

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

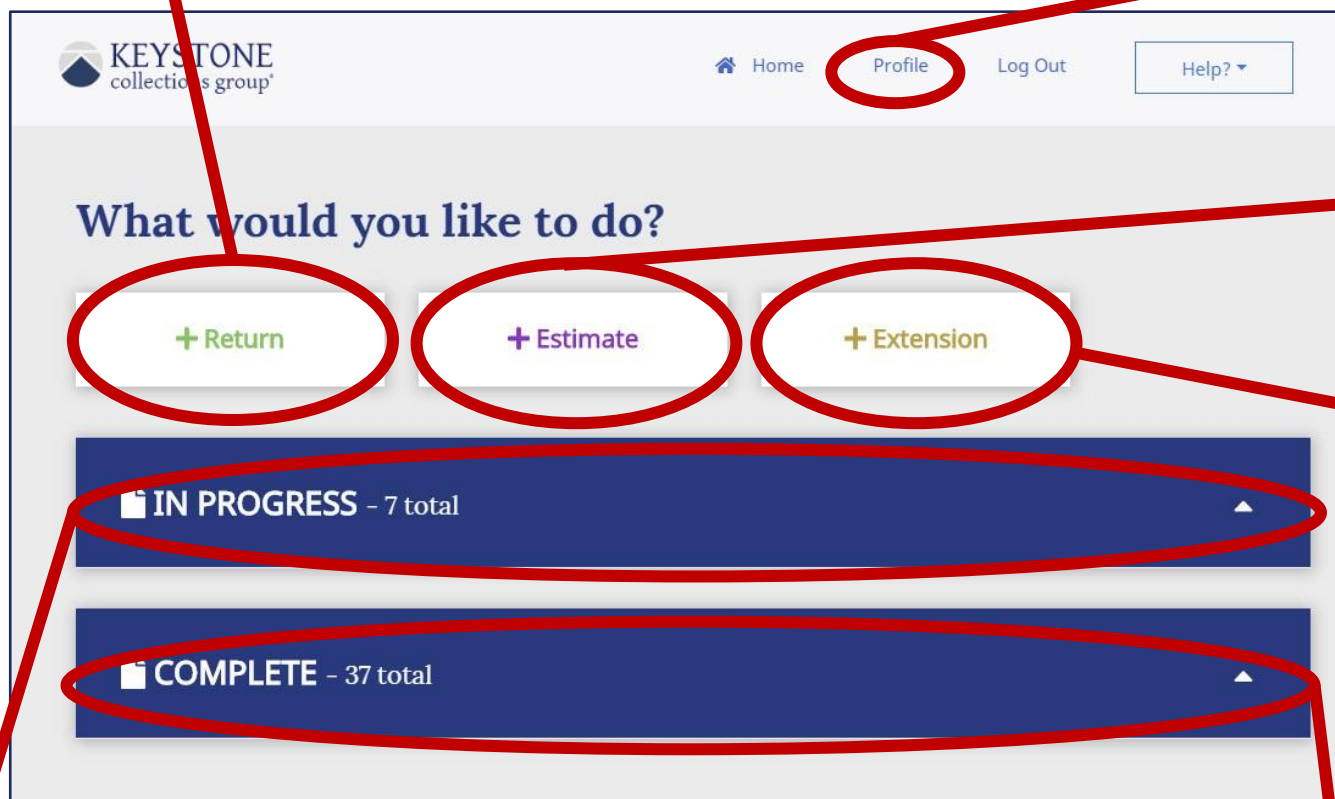
Update email address, name, address and other details.
Note: You cannot change your username. You can create a new account with a new username and email.

Estimate

Make Quarterly
Estimated Payments
if you are self-pay.

Extension

File for an extension
on the filing return
due date.



In Progress

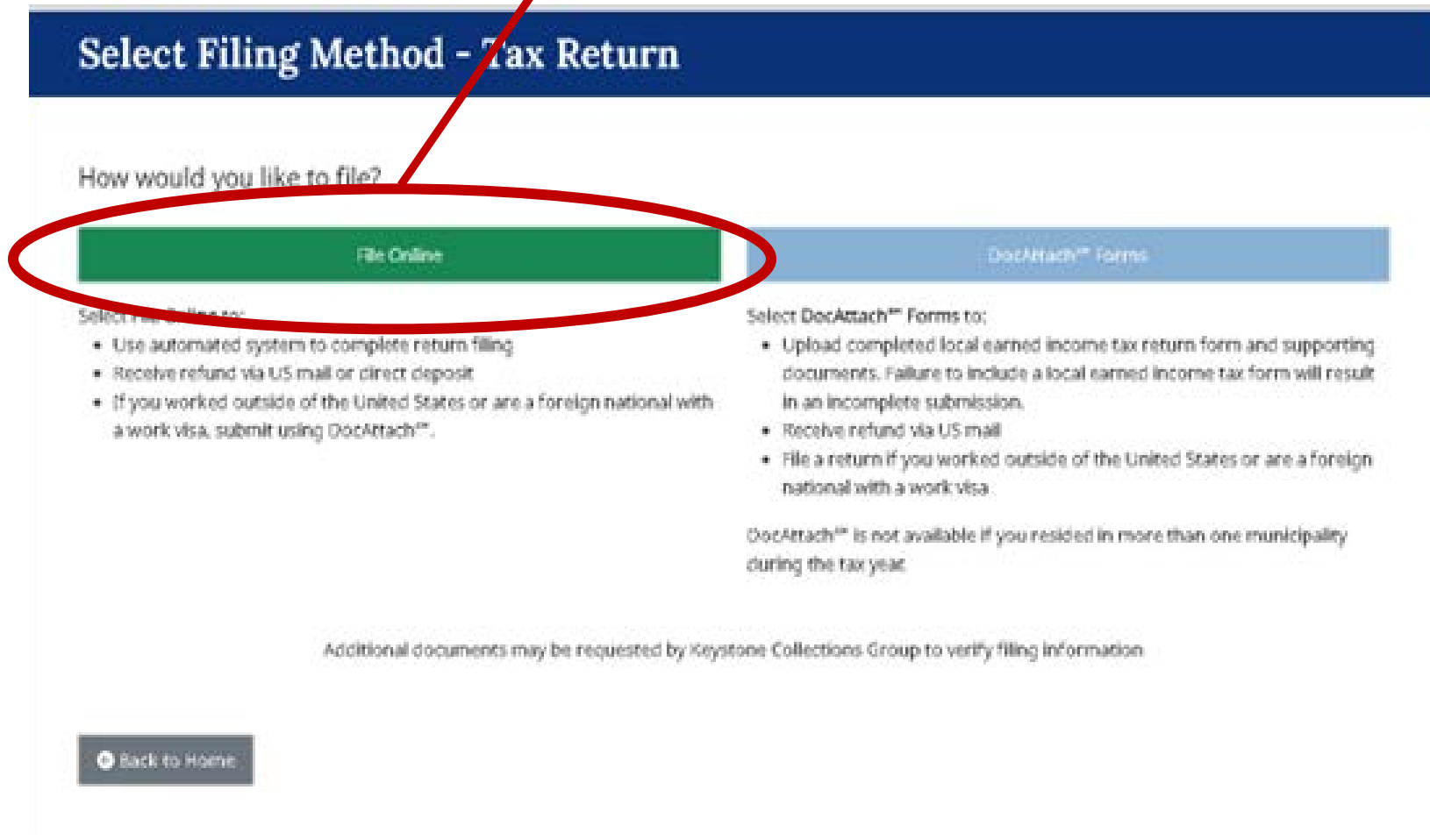
See all unfinished filings. These can
be continued or deleted.

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 for:

- 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™.

DocAttach™ Forms

Select DocAttach™ Forms to:

- Upload completed local earned income tax return form and supporting documents. Failure to include a local earned income tax form will result in an incomplete submission.
- Receive refund via US mail
- File a return if you worked outside of the United States or are a foreign national with a work visa.

DocAttach™ is not available if you resided in more than one municipality during the tax year.

Additional documents may be requested by Keystone Collections Group to verify filing information.

[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 used is 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

The screenshot displays the W-2 form interface. At the top, Box b (Employer identification number (EIN)) is 99-1234567 and Box c (Employer name) is AAA Construction LLC. Below this is the 'Special Cases' section with three questions: Box 10 (Are there dependent care benefits?), Box 13 (Is third-party sick pay checked?), and Box 14 (Is there clergy housing allowance?). Each has 'Yes' and 'No' radio buttons, with 'No' selected for all. Below the special cases is a table for multiple work locations. The table has six columns: Box 15 (State), Box 16 (State wages, tips, etc.), Box 17 (State income tax), Box 18 (Local wages, tips, etc.), Box 19 (Local income tax), and Box 20 (Locality name). There are two rows of data. The first row shows PA, 33434.20, Not Needed, 16230.24, 284.05, and 720501. The second row shows PA, an empty box, Not Needed, 17203.94, 17204.00, and 720701, with a red 'x Remove' link to its right. Below the table is a blue '+ ADD ANOTHER LINE' link. At the bottom are 'Back' and 'Next' buttons.

Box 15. State	Box 16. State wages, tips, etc.	Box 17. State income tax	Box 18. Local wages, tips, etc.	Box 19. Local income tax	Box 20. Locality name
PA	33434.20	Not Needed	16230.24	284.05	720501
PA		Not Needed	17203.94	17204.00	720701

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

Box b. Employer identification number (EIN)	Box 16. State wages, tips, etc.	Box 19. Local income tax	Box 20. Locality name
11-1111111	27000.00	270.00	30

[+ ADD ANOTHER LINE](#)

[Back](#) [Next](#)



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

Some employers will apportion earnings and withholding by multiple resident locations



Employment - Keese Tone

Box b. Employer identification number (EIN) 11-1111111 Box c. Employer name Boring Test Services, Inc

Special Cases

Box 10. Are there dependent care benefits? ☐ Yes ☒ No

Box 13. Is third-party sick pay checked? ☐ Yes ☒ No

Box 14. Is there clergy housing allowance? ☐ Yes ☒ No

Box 15. State	Box 16. State wages, tips, etc.	Box 17. State income tax	Box 18. Local wages, tips, etc.	Box 19. Local income tax	Box 20. Locality name
PA	27000.00	Not Needed	9747.32	97.47	30
PA	14620.52	Not Needed	4873.98	68.23	30 x Remove

[+ ADD ANOTHER LINE](#)

[Back](#) [Next](#)

PA Schedule RK-1

Income from Sub S, Partnership, LLC

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 PA Schedule RK-1

Close

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 - PA Schedule RK-1

Entity Name

FEIN

FEIN2

Entity Type

Partner Type

1. Business Income

Is Loss: ☐ Yes ☐ No

12. Guaranteed Payments for Service

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	
 Delete		 Edit

W2	2018
Employer	Test Boring Services Inc
Taxable Income	\$14,620.52
 Delete	 Edit

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.

Schedule UE		2018
Employer	MILLERSBURG AREA SCHOOL DISTRICT	
Expenses	\$978.00	
✖ Delete		✎ Edit

[← Back to Home](#)

Review Income ➔

Confirm W-2 Withholding

One employer

Progress bar: Filer Information (checked), **Income & Deductions**, Payments & Credits, Final Review

Income & Deductions – W2 Withholding

Keese Tone | **Tony Tone**

15. State	16. State Wages	18. Local Wages	19. Local Withholding	20. Locality	Withholding Type ?
PA ▼	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 ?
PA ▼	60329.93	60329.93	603.95	22	Local Income Ta ▼
PA ▼	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 ?	\$0.00
Additional Resident Withholding	<input type="text" value="0.00"/>
What's this?	

← 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"/>
What's this?	

← 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

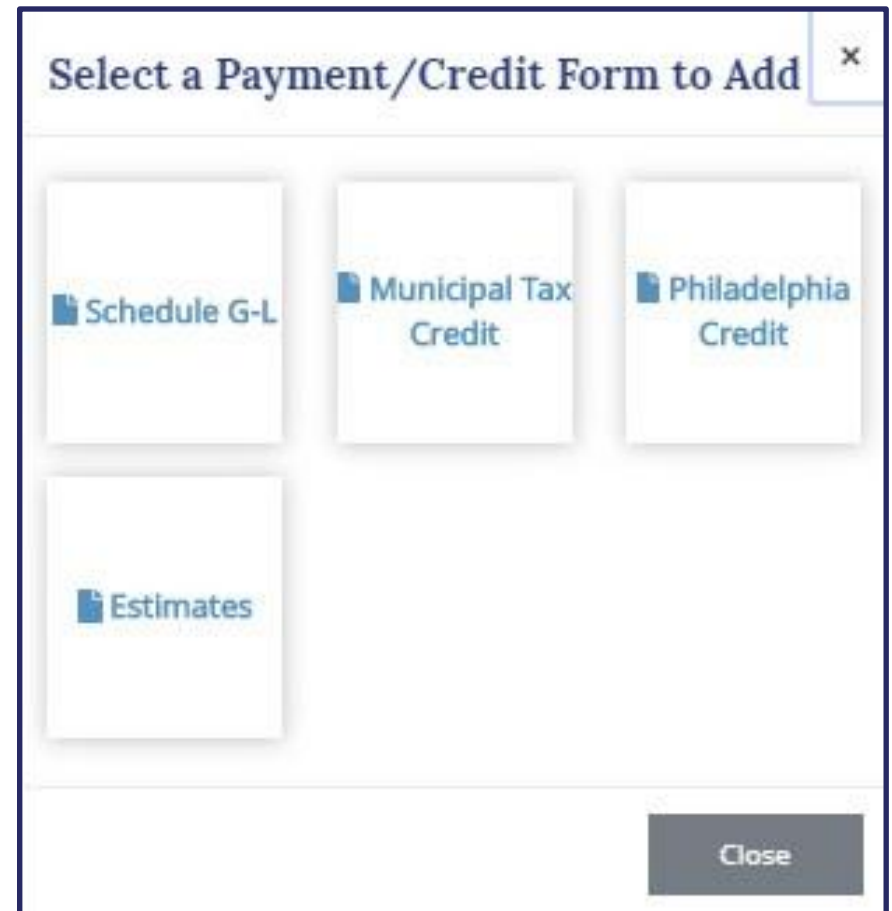
- Report income tax paid to out-of-state municipality

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

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

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"/>

[Back](#) [Next](#)

Select a Payment/Credit Form to Add

Schedule G-L

Municipal Tax Credit

Philadelphia Credit

Estimates

Close

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

Select

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	
Continue	

Return will not move from
IN PROGRESS
to COMPLETE
until the taxpayer pays
online or a
scheduled payment is
processed.
Returns remain IN
PROGRESS until the
scheduled payment date.

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

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

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