

City of Bedford  
Online Municipal Tax Presentation

**Advanced return demo!**

Welcome everyone to this Online Demonstration of preparing a City of Bedford Tax Return.

You can go to <https://Mitstaxonline.com/bedford> to get to the e-file system. You can also access the system through the city website at [www.Bedfordoh.gov](http://www.Bedfordoh.gov).

Top of the page should say Bedford E-File.

You must be in MITS System to use this E-file system

You must use your Social security number, or if married filing joint, use the primary's SS#

After January 15<sup>th</sup> of every year, you'll need to obtain a personal identification number or PIN through the e-file system.

First choose the button next to "I am an individual who wants to file my tax return"

- Enter SSN without dashes (you can click on eye symbol to see what you entered)
- Click on "Don't have a pin."
  - Enter a PIN. Your PIN should be memorable to you, but hard for others to guess. It must be between 4 and 10 characters long, must include at least 1 letter and at least 1 number. The PIN is CASE SENSITIVE. Don't forget to write your PIN down. You may need it again to get back into the system at a later time this year.
  - Enter the numeric portion of your street address.
  - Click Set My PIN. A notification stating your pin has been set will appear. You are now ready to log in.

To log in, enter your SSN. It should already be entered.

Enter the PIN you just set.

Scroll down the page. Read the E-File agreement.

Under the E-File agreement, click the box next to the statement, "I have read, understand, and accept the conditions shown above under "E-File Agreement." You cannot log in without clicking this box.

Click the Login button (which looks like a pad lock).

The next screen will say "Welcome to Bedford e-file!" At the top of the page there will be 5 different colored tabs:

- Introduction
- Income
- Summary
- Final Return and
- Logout

As you click continue, the system will go through each tab.

Under the "Welcome to Bedford e-file!" is a message that says,

"Please be advised that this website is limited to accepting tax returns with the following criteria:

- W-2, 1099-Misc, W-2G, Schedules C, E and K-1.
- If more than one city is listed on a W-2, one of those cities must be Bedford.
- If you lived in Bedford for only part of the year, you may use this utility to complete your tax return SO LONG AS you do not have any losses to file.
- A taxpayer using e-File to prepare their Bedford tax return is requested to submit all supporting documents along with the signed printed copy of their tax return to the Bedford Tax office.
- As a reminder, the Bedford tax rate is 3% and our credit is 100% up to 2.25%."

Click the green and yellow continue button.

**This brings us to the Tax payer info section.**

Please review the information on the page. If correct, click the continue button.

If you moved into or out of the city you need to click on the box next to move in and out dates and choose dates moved in and out to allow apportionment of income and taxes paid for time spent as a resident in Bedford.

We will assume there are **Moving in/out of city changes** and you are a whole year resident.

Click the green and yellow continue button.

**This brings us to Residency and Forms page.**

We will assume you have **one W-2, you work in two Cities that is not Bedford and you have courtesy tax withheld.**

Click on green box **Update Taxpayer information!**

**Click on residency box that states when you were a Bedford resident and change the date from or through to correspond to when you moved in or out of Bedford! This example will use moving in April 1, 2018!**

Change date to April 1, 2018 to move into city leave December 31, 2018 as ending date.

Then Click green box send information.

Then click continue button

Next we will see choices of forms we will be earning income from in 2018 W-2, 1099 forms, schedule c, Schedule E, w-2G, and Schedule K-1, and other

**Check off boxes that apply** we will input all that all forms are used for this example. Remember we had a move in date of April1, 2018 some income may be earned before this date and some after this date only. Later you will be asked what forms filed require an allocation due to moving in/out of city.

Click the checkbox next to W-2. Click the green and yellow continue button.

A pop up screen stating that your forms selections has been saved. Click ok.

The next screen is in the Income tab. The W-2 form is the form listed since this is what you selected.

To add your W-2, click Add a New W-2 form. You will now add your W-2 Form information.

Fill in the yellow areas exactly as shown on your W-2. The largest earnings number (normally Medicare, box 5) should be the amount in the city taxes, box 18.

To denote how many cities are listed for Locality Name (Box 20)? Click the button next to 1 or 2.

Enter Withholding Local Income Tax (19)

Click save to save this W-2.

This will bring you back to the W-2s Forms page. If you had more than one W-2, click Add a New W-2 form. In this case, you have no other W-2s. Click the green and yellow continue button.

Example information:

W-2 entry: We have a taxpayer who earned \$50,000 in two Cities on W-2 and had courtesy tax withheld (**Bedford Tax**) from employer Mr. Boss \$10,000 was earned in Cleveland a 2.5% taxing rate community and \$40,000 was earned in Maple Heights also a 2.5% taxing rate community. Overall courtesy tax .0075 x earnings \$50,000 or \$375.00 and this amount was also withheld from the residents pay, for Bedford all these were noted on W-2, but our system can only take **one other city** and the Bedford courtesy tax, on one w-2 entry. Can we enter this w-2 any way?

Yes, by splitting the information on 2- W-2 entries as follows:

10,000 show entries on w-2 for Cleveland, then show entries on W-2 for Maple Heights \$40,000 and we will record Bedford courtesy tax on this w-2 of \$375.00 paid to Bedford. Click continue

The next screen will be Apply Losses. You have no losses to apply. W-2 employees will not have any losses. Click the green and yellow continue button.

After entries hit continue, next is W-2 G Casino Royal winnings \$5000! Record income earned on this form and where it was earned and any taxes paid to that city. Click continue button

Next is your Schedule C business owned by Mrs. Enterprises, enter net earnings \$3,000 where earned and if any taxes paid to that city. Click continue button.

Next is our Schedule E rental property income of \$1000.00 please enter \$1000 income where earned and how much in city taxes paid to that community. Then Click continue.

Finally from A business you are a partner with and you received a k-1 form with ordinary income, you record this income \$5000 the happy times company and where earned and again if any taxes paid.

**This** brings you to the **summary tab, Summary of Forms page**. Please carefully review the information below and check for accuracy. Click the green and yellow continue button.

Here is where you post whether your earnings are to be allocated per your move in date or fully taxed to Bedford when earned!

So for example let's say the W-2 for just Cleveland needs allocation due to earnings throughout all of 2018 but the Maple heights earning were only after April 1, 2018 moving into the city of Bedford also only the Schedules C and E were earned throughout the whole year in 2018. Click the boxes next to the earnings and the partial year allocation will only effect these items. If earnings are fully taxed in Bedford leave box unchecked, no apportionment will be applied. **NOTE:** IF you apportion, you will need to show you filed taxes with another entity prior to April1, 2018, if moved from a taxing district in Ohio.

After checking appropriate boxes then click Continue Button,

**The next** screen is the Estimated Taxes screen. On this screen you will enter your estimated tax amount for the next tax year. State law requires estimates to be paid when the amount is \$200 or more. It will pre-populate with the suggested estimate. You would only change this if your income changed or is changing. If you change the pre-populated estimate, click save estimate. Click the green and yellow continue button. YOU can reset and save estimate or save current estimate and continue.

The next screen is the Overpayment of Taxes screen. You have no overpayment. Click the green and yellow continue button.

The next screen is the **Overview screen**. Please read this screen carefully. Remember that your filing is not complete until you hit the Finalize Button on the next screen.. Click the green and yellow continue button.

**Hover your mouse over the Final return box area then print your return** for your records and sending into City with documents showing your forms and filings in other cities.

Additionally, you **MUST MAIL YOUR PRINTED FORM** along with your W-2's and/or schedules to the tax office at the address shown on the tax form. Mail to Bedford Tax Department, 165 Center Rd., Bedford, OH 44146

The next screen is the **Final Return Screen**. Your completed return will show up in pdf format. If you are satisfied with your return, click Finalize. Once you Finalize, you will not be able to go back and change anything on your return. Once finalized, you may also print your return and mail to the Bedford Tax Department.

**You cannot go back and change figures after you finalize return!**