CIVICA

Tax Connect

User Guide

Tax Connect

Tax Connect provides users a secure, easy-to-use way to make online payments, manage their account, and submit their tax information online with the E-File option. Tax Connect users can select different types of payments to their Tax Department. The types of payments that can be made online through Tax Connect are:

- Tax Due,
- Estimated Taxes, and
- Penalty/Interest payments.

Opening Screen – Disclaimer

When users navigate to the Tax Connect website, the first screen that will appear is the General Disclaimer screen.

General Disclaimer

The account information contained within this web site is generated from computerized records maintained by City of Toledo. While every effort is made to assure the data is accurate and current, it must be accepted and used by the recipient with the understanding that no warranties, expressed or implied, concerning the accuracy, reliability or suitability of this data have been made. City of Toledo, their agents, and the developers of this web site assume no liability whatsoever associated with the use or misuse of the data contained herein. By accessing or using this Web site, you agree to the terms.

This is a custom message area for Tax Department to express themselves.

[Accept]   [Decline]

- After reading the Disclaimer, Click [Accept] to continue to Tax Connect, or Click [Decline] to exit from Tax Connect.

Registering For the First Time

Log in.

Use username or email address to log in.

Login	
Password	

Log in

Register as a new user

Forgot your password?

- Click on "Register as a new user" to register for a Login ID and Password.

Registration: Your Account Information

- Fields Marked with '*****' are required.

Register.

Create a new account.

* indicates required field.

*	**Account Number**	
	("*Use dash. Ex. 0000000-N")	
*	**Federal ID**	
	("*Use dashes. Ex. 000-00-0000 or 00-0000000")	
*	**Email**	
*	**User Name**	
*	**Password**	
*	**Confirm password**	

Register

- **Account Number -** Enter in your Account Number (Include all preceding zeros in your account number)

- **Federal ID -** Enter in your Federal ID for a Business Account, or your Social Security Number For an Individual Account.

- **Email -** Enter in your valid Email address.

- **Username -** Enter in a Username. (Case Sensitive)

- **Password -** Enter in a Password. (Case Sensitive)

NOTE: *Password must be 8 Characters or longer, contain an uppercase character, a number, and a special character such as # ! $ % @ or &.*

- **Confirm Password -** Enter in your Password again, exactly like you did in the previous Password Field.

- Click

Registration Instructions Screen:

- To complete the registration process, look for an email in your inbox that provides further instructions.

- Once the email is received, there is a link that you will need to click to complete the Registration.

- Select "Click here to Log in".

Log in Screen

Log in.

Use username or email address to log in.

| Login | [   ] |
| Password | [   ] |

Log in

Register as a new user

Forgot your password?

- Enter in your Login information.
    o **Login** – Enter the Username you created (Case Sensitive) in the Login Field.
    o **Password** – Enter in the Password you created (Case Sensitive) in the Password Field.

NOTE: *If you have forgotten your Password, Click on* Forgot your password? .
The Forgot your password? Screen will display:

Forgot your password?.

Enter your email.

| Email | [   ] |

Email Link

- Enter the Email address you have associated with your account and it will send you a link to your email to reset your password.

- Click Email Link.

Account Summary

- The Account Summary screen will be the first screen to display when you successfully login to Tax Connect.

The following information will be displayed:

- **Account** – Account Number generated by the Tax Department

- **Name** – Name on Account

- **Status** – Status of account (Active/Inactive)

- **Fiscal Year End** – The date the fiscal year ends

- **Address** – The Current address of file for the account

- **History** – The History of the account

    - Click on History

    - A list of tax years will display with the following information:
        - Year – Tax Year

        - Total Due – Total dollar amount due

        - Total Amount Paid/Credit – Total dollar amount of payments/credits

        - Total Balance – Total dollar amount of any remaining balance

        - Tax Balance – Total dollar amount of Tax Balance

        - P/I Balance – Total dollar amount of Penalty/Interest balance

- Transactions – By clicking on Transactions, it will pull up all of the detailed information for all transactions for that Tax Year.

Transaction Details

### Account No. 0019849-R - (Income Reporting)

DATE	DESCRIPTION	TAX YEAR	AMOUNT OWED	AMOUNT PAID
05/04/2015	Tax Payment	2014	$0.00	$56.15
04/29/2015	Tax Return	2014	$1,567.05	$517.23

| 1 | | | | Back |

Details include:

- **Date –** Date of Transaction

- **Description –** Description of the transaction

- **Tax Year –** Tax Year in which the transaction was for

- **Amount Owed –** Total dollar amount owed after the transaction

- **Amount Paid –** Total dollar amount of Payments made

Tax Menu

Tax Menu: Account Summary

- Lists all accounts and a summary of those accounts.
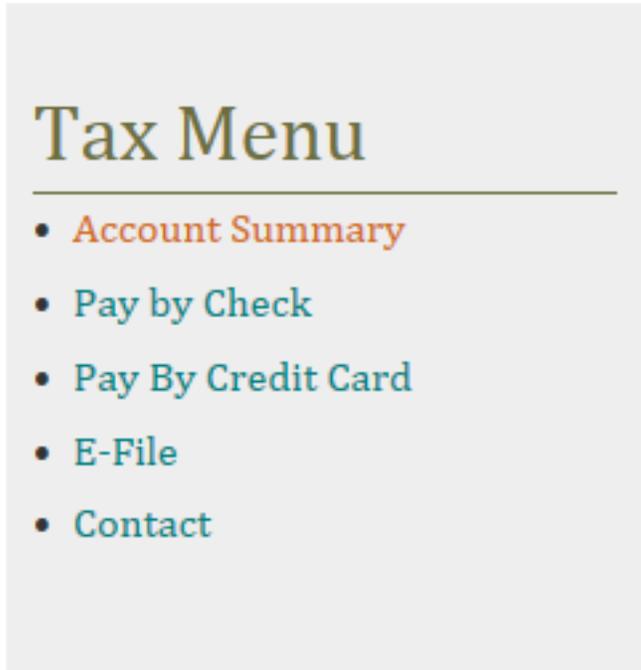
- Under the Tax Menu, Click **Account Summary**

Tax Menu: Pay By Check

Tax Menu
- Account Summary
- Pay by Check
- Pay By Credit Card
- E-File
- Contact

Scheduled Tax ACH Payment

Account No. 1999991-R

You do not have a valid registered bank account. Please call the office to register one before attempting a payment by bank account.

Payment History

Account	Submit Date	Bank Account	Transaction Type	Amount	Status

- Under Tax Menu, Click Pay by Check.

- Schedule a Tax ACH Payment by check.

NOTE: You must have a valid registered bank account in order to use this option. If you do not have one registered, you will receive the following error message: "You do not have a valid registered bank account. Please call the office to register one before attempting a payment by bank account."

Tax Menu: Pay By Credit Card

- Under Tax Menu, Click Pay by Credit Card.

- Make an electronic Payment using your credit/debit card.

- Type of Payment you wish to Make

  o Choose the Type of Payment you would like to make.

    ▪ **Tax Due** – Make a payment on Taxes that are due

    ▪ **Estimated Tax** – Make a payment on Estimated Taxes

    ▪ **Penalty/Interest** – Make a Penalty/Interest Payment

Tax Due: Tax Due

Tax Payment

Account No. 199999-R - (Income Reporting)

indicates required field.

* Year	Choose an option ⌄
Amount Owed	$0.00
* Amount To Pay	0
* Pay Using	Choose an option ⌄
Continue	

'*****' Indicates required field

Year

- Enter in the Tax Year that the payment is for.

Amount Owed

- Total dollar amount that is owed.

Amount to Pay

- Enter in the amount you wish to pay.

Pay Using

- Choose the Credit Card type for this payment.

- Click Continue.

The Following Payment screen will display:

VERIFY THE FOLLOWING PAYMENT...

Tax Payment Details

Amount To Pay	$100.00
Tax Year	2014

Make Payment   Cancel

* You will be redirected to Official Payments Corporation's secure payment gateway to complete your payment.

- Click **Make Payment** to continue with the payment or Click **Cancel** to cancel the payment.

A Payment Disclaimer screen will show:

Payment Disclaimer

At your request, you are being re-directed to a third party site. Please acknowledge the disclaimer before proceeding further. You are about to access a third party site, the accuracy or completeness of the information, materials, services or the reliability of any service, advice, opinion, statement or other information displayed or distributed through it, City of Toledo does not warrant. You shall access this site solely for purposes of payment of your bills/dues and you understand and acknowledge that availing of any services offered on the site or any reliance on any opinion, advice, statement, memorandum, or information available on the site shall be at your sole risk. The City of Toledo and its affiliates, subsidiaries, employees, officers, directors and agents, expressly disclaim any liability for any deficiency in the services offered by Official Payments whose site you are about to access. Neither the City of Toledo nor any of its affiliates nor their directors, officers and employees will be liable to or have any responsibility of any kind for any loss that you incur in the event of any deficiency in the services of Official Payments to whom the site belongs, failure or disruption of the site of Official Payments, or resulting from the act or omission of any other party involved in making this site or the data contained therein available to you, or from any other cause relating to your access to, inability to access, or use of the site or these materials. Please note that once you are redirected to the third party site, you will be logged out of the Toledo Tax site.

Accept   Decline

- After reading the Disclaimer, Click **Accept** to continue or Click **Decline** to cancel.

NOTE: Once you click Accept, You will be redirected to Official Payments Corporation's secure payment gateway to complete your payment.

Make A Payment

City of Toledo

Tax Payments

This payment service is offered by Official Payments Corporation as authorized by the entity to which you are making a payment. Please confirm your payment amount, convenience fee and total (if applicable). Review the Terms and Conditions below and click "Accept" to proceed with your payment. Click "Decline" button to return to the beginning of the payment process.

- Do not use your browser's "Back" button. Instead, navigate using the buttons below.

Payment Type:	Tax Payments
Payment Amount:	$100.00
Service Fee:	$2.50
Total Payment:	$102.50

Official Payments Terms and Conditions:

Official Payments Corporation charges a service fee to use this service to make the payment outlined above. This fee is separate from the primary obligation you are paying. The service fee is included in the "Total Payment" line above.

Completion of a payment transaction is contingent upon both the authorization of payment by your card company and acceptance of your payment by the entity you are paying. In the event that your payment is unable to be processed, Official Payments will attempt to notify you at least once using the contact information you have provided. In the event your payment is not processed or authorized by your card company or the applicable entity you are seeking to pay fails to accept your payment your payment liability shall remain outstanding and unpaid and you will be subject to all applicable penalties, late fees and interest charges assessed by the relevant entity thereon, all of which obligations remain your sole responsibility.

Card Authorization Agreement

🖶 Printer Friendly

Decline ✖   Accept ●

- Click **Decline ✖** to decline the Terms and Conditions or Click **Accept ●** to Accept the Terms and Conditions and to Continue with the Payment.

![CIVICA]

The Following Payment Screen will Display:

Payer Information
(Information for the person making the payment.)

*Country:	United States
*First Name:	
Middle Name:	
*Last Name:	
Suffix: (Jr., Sr. etc.)	
*Street Address:	
*Town/City:	
*State:	--
*Zip Code:	
(Use this field for APO, FPO, AA, AE or AP codes.)	
*Daytime Phone:	( ) -
*E-mail Address:	
(Required for an e-mail confirmation and online verification.)	
*Re-enter E-mail Address:	
Account Number :	0019849-R
Account Type:	1

Payment Option
(May differ from the person owing the tax, bill, or fee.)

*Card Type:	- Select -
*Card Number:	
*Expiration Date:	-- / -- (mm/yy)

Payment Information

Payment Type:	Tax Payments
Payment Amount:	$100.00
Convenience Fee:	$2.50
Total Payment:	$102.50

Back   Cancel   Continue

Payer Information:

- **Country**
  o Select the Country from the Drop Down List.
- **First Name**
  o Enter your First Name.
- **Middle Name**
  o Enter your Middle Name.
- **Last Name**
  o Enter your Last Name.
- **Suffix**
  o Enter the Suffix (Jr., Sr., Etc.)
- **Street Address**
  o Enter the Full Street Address
- **Town/City**
  o Enter in the City.
- **State**
  o Select the State from the Drop Down List.
- **Zip Code**
  o Enter the Zip Code

- **Daytime Phone**
    - o Enter in the best Daytime Phone Number.
- **E-Mail Address**
    - o Enter in a valid e-mail address
- **Re-Enter E-Mail Address**
    - o Re-enter in the valid e-mail address.
- **Account Number**
    - o This will display the account number that the payment is for.
- **Account Type**
    - o This will display the Account Type.

Payment Option:

- **Card Type**
    - o Select what type of Credit Card being used for the payment.
- **Card Number**
    - o Enter in the Credit Card Number.
- **Expiration Date**
    - o Enter in the Expiration Date.

Payment Information:

- **Payment Type**
    - o This will display the Type of Payment
- **Payment Amount**
    - o This will display the dollar amount of the payment.
- **Convenience Fee**
    - o This will display the dollar amount of any Convenience Fees.
- **Total Payment**
    - o This will display the total payment amount. (payment amount + Convenience Fees)

- Click [Back] to go back to the previous screen.

- Click [Cancel] to cancel the payment.

- Click [Continue] to continue with the payment.

A Payment Confirmation Screen will display:

- Verify that all information is showing correctly.

- Click **Edit** to correct any of the information displayed.

- Click **Cancel** to cancel the payment.

- Click **Submit** to submit the payment.

Estimated Tax: Estimated Tax

EstimatedTax Payment

Account No. 199999-R - (Income Reporting)

* indicates required field.

* Year	2016
* Quarter/Period	-Please select-period ˅
Amount Owed	$0.00
* Amount To Pay	0
* Pay Using	Choose an option ˅

Continue

'*****' Indicates required field

Year

- Enter in the Tax Year that the payment is for.

Quarter/Period

- Enter the Quarter/Period in which the payment is for.
    - 1st Quarter
    - 2nd Quarter
    - 3rd Quarter
    - 4th Quarter

Amount Owed

- Total dollar amount that is owed.

Amount to Pay

- Enter in the amount you wish to pay.

Pay Using

- Choose the Credit Card type for this payment.

- Click Continue.

The Following Payment screen will display:

VERIFY THE FOLLOWING PAYMENT...

Tax Payment Details

Amount To Pay	$100.00
Tax Year	2014

Make Payment   Cancel

* You will be redirected to Official Payments Corporation's secure payment gateway to complete your payment.

- Click Make Payment to continue with the payment or Click Cancel to cancel the payment.

A Payment Disclaimer screen will show:

Payment Disclaimer

At your request, you are being re-directed to a third party site. Please acknowledge the disclaimer before proceeding further. You are about to access a third party site, the accuracy or completeness of the information, materials, services or the reliability of any service, advice, opinion, statement or other information displayed or distributed through it, City of Toledo does not warrant. You shall access this site solely for purposes of payment of your bills/dues and you understand and acknowledge that availing of any services offered on the site or any reliance on any opinion, advice, statement, memorandum, or information available on the site shall be at your sole risk. The City of Toledo and its affiliates, subsidiaries, employees, officers, directors and agents, expressly disclaim any liability for any deficiency in the services offered by Official Payments whose site you are about to access. Neither the City of Toledo nor any of its affiliates nor their directors, officers and employees will be liable to or have any responsibility of any kind for any loss that you incur in the event of any deficiency in the services of Official Payments to whom the site belongs, failure or disruption of the site of Official Payments, or resulting from the act or omission of any other party involved in making this site or the data contained therein available to you, or from any other cause relating to your access to, inability to access, or use of the site or these materials. Please note that once you are redirected to the third party site, you will be logged out of the Toledo Tax site.

Accept   Decline

- After reading the Disclaimer, Click Accept to continue or Click Decline to cancel.

NOTE: *Once you click Accept, You will be redirected to Official Payments Corporation's secure payment gateway to complete your payment.*

Make A Payment

City of Toledo

Tax Payments

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- Do not use your browser's "Back" button. Instead, navigate using the buttons below.

Payment Type:	Tax Payments
Payment Amount:	$100.00
Service Fee:	$2.50
Total Payment:	$102.50

Official Payments Terms and Conditions:

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Completion of a payment transaction is contingent upon both the authorization of payment by your card company and acceptance of your payment by the entity you are paying. In the event that your payment is unable to be processed, Official Payments will attempt to notify you at least once using the contact information you have provided. In the event your payment is not processed or authorized by your card company or the applicable entity you are seeking to pay fails to accept your payment your payment liability shall remain outstanding and unpaid and you will be subject to all applicable penalties, late fees and interest charges assessed by the relevant entity thereon, all of which obligations remain your sole responsibility.

Card Authorization Agreement

🖶 Printer Friendly

[Decline ❌]   [Accept ➤]

- Click [Decline ❌] to decline the Terms and Conditions or Click [Accept ➤] to Accept the Terms and Conditions and to Continue with the Payment.

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The Following Payment Screen will Display:

Payer Information:

- **Country**
    - o Select the Country from the Drop Down List.
- **First Name**
    - o Enter your First Name.
- **Middle Name**
    - o Enter your Middle Name.
- **Last Name**
    - o Enter your Last Name.
- **Suffix**
    - o Enter the Suffix (Jr., Sr., Etc.)
- **Street Address**
    - o Enter the Full Street Address
- **Town/City**
    - o Enter in the City.
- **State**
    - o Select the State from the Drop Down List.
- **Zip Code**
    - o Enter the Zip Code

- **Daytime Phone**
  - o Enter in the best Daytime Phone Number.
- **E-Mail Address**
  - o Enter in a valid e-mail address
- **Re-Enter E-Mail Address**
  - o Re-enter in the valid e-mail address.
- **Account Number**
  - o This will display the account number that the payment is for.
- **Account Type**
  - o This will display the Account Type.

Payment Option:

- **Card Type**
  - o Select what type of Credit Card being used for the payment.
- **Card Number**
  - o Enter in the Credit Card Number.
- **Expiration Date**
  - o Enter in the Expiration Date.

Payment Information:

- **Payment Type**
  - o This will display the Type of Payment
- **Payment Amount**
  - o This will display the dollar amount of the payment.
- **Convenience Fee**
  - o This will display the dollar amount of any Convenience Fees.
- **Total Payment**
  - o This will display the total payment amount. (payment amount + Convenience Fees)

- Click Back to go back to the previous screen.

- Click Cancel to cancel the payment.

- Click Continue to continue with the payment.

A Payment Confirmation Screen will display:

Payer Information

First Name:	John
Middle Name:	
Last Name:	Doe
Suffix:	
Street Address:	123 Main St
Town/City:	Yourtown
State:	OH
Zip Code:	45344
Country:	United States
Daytime Phone Number:	(937) 555 - 5555
E-mail Address:	yourname@civicacmi.com
Account Number :	0019849-R
Account Type:	1

Payment Option

Card Type:	Visa
Card Number:	************1111
Expiration Date:	02/2019

Payment Information

Payment Type:	Tax Payments
Payment Amount:	$100.00
Convenience Fee:	$2.50
Total Payment:	$102.50

Edit   Cancel   Submit

- Verify that all information is showing correctly.

- Click Edit to correct any of the information displayed.

- Click Cancel to cancel the payment.

- Click Submit to submit the payment.

Penalty/Interest: Penalty/Interest

Penalty and Interest Payment

Account No. 199999-R - (Income Reporting)

* indicates required field.	
* Amount To Pay	0
* Year	Choose an option ▾
Amount Owed	$0.00
* Pay Using	Choose an option ▾
Continue	

'*****' Indicates required field

Amount to Pay

- Enter in the amount you wish to pay.

Year

- Enter in the Tax Year that the payment is for.

Amount Owed

- Total dollar amount that is owed.

Pay Using

- Choose the Credit Card type for this payment.

- Click Continue.

The Following Payment screen will display:

- Click **Make Payment** to continue with the payment or Click **Cancel** to cancel the payment.

A Payment Disclaimer screen will show:

- After reading the Disclaimer, Click **Accept** to continue or Click **Decline** to cancel.

NOTE: Once you click Accept, You will be redirected to Official Payments Corporation's secure payment gateway to complete your payment.

Make A Payment

City of Toledo

Tax Payments

This payment service is offered by Official Payments Corporation as authorized by the entity to which you are making a payment. Please confirm your payment amount, convenience fee and total (if applicable). Review the Terms and Conditions below and click "Accept" to proceed with your payment. Click "Decline" button to return to the beginning of the payment process.

- Do not use your browser's "Back" button. Instead, navigate using the buttons below.

Payment Type:	Tax Payments
Payment Amount:	$100.00
Service Fee:	$2.50
Total Payment:	$102.50

Official Payments Terms and Conditions:

Official Payments Corporation charges a service fee to use this service to make the payment outlined above. This fee is separate from the primary obligation you are paying. The service fee is included in the "Total Payment" line above.

Completion of a payment transaction is contingent upon both the authorization of payment by your card company and acceptance of your payment by the entity you are paying. In the event that your payment is unable to be processed, Official Payments will attempt to notify you at least once using the contact information you have provided. In the event your payment is not processed or authorized by your card company or the applicable entity you are seeking to pay fails to accept your payment your payment liability shall remain outstanding and unpaid and you will be subject to all applicable penalties, late fees and interest charges assessed by the relevant entity thereon, all of which obligations remain your sole responsibility.

Card Authorization Agreement

Printer Friendly

Decline ✖   Accept ●

- Click **Decline ✖** to decline the Terms and Conditions or Click **Accept ●** to Accept the Terms and Conditions and to Continue with the Payment.

The Following Payment Screen will Display:

Payer Information:

- **Country**
  - o Select the Country from the Drop Down List.
- **First Name**
  - o Enter your First Name.
- **Middle Name**
  - o Enter your Middle Name.
- **Last Name**
  - o Enter your Last Name.
- **Suffix**
  - o Enter the Suffix (Jr., Sr., Etc.)
- **Street Address**
  - o Enter the Full Street Address
- **Town/City**
  - o Enter in the City.
- **State**
  - o Select the State from the Drop Down List.
- **Zip Code**
  - o Enter the Zip Code

- **Daytime Phone**
  - o Enter in the best Daytime Phone Number.
- **E-Mail Address**
  - o Enter in a valid e-mail address
- **Re-Enter E-Mail Address**
  - o Re-enter in the valid e-mail address.
- **Account Number**
  - o This will display the account number that the payment is for.
- **Account Type**
  - o This will display the Account Type.

Payment Option:

- **Card Type**
  - o Select what type of Credit Card being used for the payment.
- **Card Number**
  - o Enter in the Credit Card Number.
- **Expiration Date**
  - o Enter in the Expiration Date.

Payment Information:

- **Payment Type**
  - o This will display the Type of Payment
- **Payment Amount**
  - o This will display the dollar amount of the payment.
- **Convenience Fee**
  - o This will display the dollar amount of any Convenience Fees.
- **Total Payment**
  - o This will display the total payment amount. (payment amount + Convenience Fees)

- Click ![Back] to go back to the previous screen.

- Click ![Cancel] to cancel the payment.

- Click ![Continue] to continue with the payment.

A Payment Confirmation Screen will display:

Payer Information

First Name:	John
Middle Name:	
Last Name:	Doe
Suffix:	
Street Address:	123 Main St
Town/City:	Yourtown
State:	OH
Zip Code:	45344
Country:	United States
Daytime Phone Number:	(937) 555 - 5555
E-mail Address:	yourname@civicacmi.com
Account Number :	0019849-R
Account Type:	1

Payment Option

Card Type:	Visa
Card Number:	************1111
Expiration Date:	02/2019

Payment Information

Payment Type:	Tax Payments
Payment Amount:	$100.00
Convenience Fee:	$2.50
Total Payment:	$102.50

Edit   Cancel   Submit

- Verify that all information is showing correctly.

- Click Edit to correct any of the information displayed.

- Click Cancel to cancel the payment.

- Click Submit to submit the payment.

Payment History

Payment History					
Account	Submit Date	Payment Type	Transaction Type	Amount	Status

- This section of the Pay By Credit Card Screen will display the following:

Account

- Account number the payment was made towards.

Submit Date

- The date the payment was submitted.

Payment Type

- The Type of Payment that was selected.

Transaction Type

- The Type of Transaction

Amount

- The dollar amount of the Payment made.

Status

- The Status of the payment.

Tax Menu: E-File

- The E-File option allows a user to submit their tax information online.

- Under Tax Menu, Click E-File.

- Select the Account you want to E-File for.

- Click Select.

The following screen will display any Existing EForms associated with the selected account:

Existing EForms

Account No. 199990-R   - DOE, JANET A   (Income Reporting)

If there isn't a form already in progress, click on *Start New Form* button

Available Forms

Account Number	Form	Year/Period	Status	

Start New Form

> **_NOTE:_** *If there is not a form already in progress. Click on Start New Form button.*

Starting a New Form:

- Click on **Start New Form** .

The screen will display the following:

EForm Begin

Account No. 199990-R   - DOE, JANET A   (Income Reporting)

Available Forms

EForm	Year/Period	Status		
Local Annual Return	-Please select-year ▾	New Filing	Continue	Cancel

EForm

- Select the Available Form that is listed.

Year/Period

- Select the Year/Period you want to complete the EForm for.

Status

- Displays the status of the Form

- Click **Continue** to start the form or Click **Cancel** to cancel the form request

Once you Click Continue, a similar screen will appear:

2015 Individual Income Tax Web Filing

Account No. 199990-R   - DOE, JANET A   (Income Reporting)

To maintain a consistent view of submitted information, use the navigation buttons provided on these pages - **Do not use your browser's 'Back' and 'Forward' buttons.**

There is a **30 minute timeout**! If you are inactive for more than **30 minutes**, your session will be logged out, and you will need to restart the filing.

Please remember to print (or save) a copy of your submitted return for your records.

Underpayment of estimated tax will result in additional penalties.

Click the "Start" button below to begin.

[Start]   [Cancel]

- Click **Start** to start the form or Click **Cancel** to cancel the form.

NOTE: There is a 30 Minute Timeout!! If you are Inactive for 30 Minutes, your session will be logged out, and you will need to restart the filing.

WARNING!!! *Do Not use your browser's 'Back' and 'Forward' buttons.*

Personal Information Screen

- Enter in all of your personal information.

'*****' Indicates required field

Your SSN:

- Enter in your SSN.

Is this your filing SSN?

- Select ⦿ Yes if it is or Select ○ No if a different SSN is being used to file.

Daytime Phone:

- Enter the best Daytime Phone number for you.

Evening Phone:

- Enter the best Evening Phone number for you.

Filing Status:

- Select the Status in which you are filing.
  - **Status:**
    - Single
    - Joint
    - Head of Household

> **NOTE:** If **your**, or **your spouse's SSN** is not correct, please contact the tax department before continuing.

- Click **Next** to continue with filing or Click **Quit** to cancel out of the form.

The W2/1099/Schedules Screen will display:

2015 Individual Income Tax Web Filing

W2/1099/Schedules

Account No. 199990-R   -DOE, JANET A   (Income Reporting)

| No Taxable Income | Add W2 | Add W2G | Add 1099 Misc | Schedule C | Schedule E | Schedule F |

EFile Forms

SSN	Employer ID	Employer Name	Type

Next   Quit

No Taxable Income: No Taxable Income

- Click No Taxable Income if you did not have any taxable income.

The No Taxable Income screen will be displayed:

No Taxable Income

Account No. 199990-R   - DOE, JANET A   (Income Reporting)

Reason For
No Income   Choose an option ▼

Continue   Cancel

- Select the Reason for No Income from the Drop Down.
  - Click ▼ to access the options:
    - No Income
    - Military
    - Retired
    - Permanent Disability

- Click **Continue** to continue filing or Click **Cancel** to cancel filing.

The Individual Income Tax Web Filing screen will display after you click Continue:

2015 Individual Income Tax Web Filing

W2/1099/Schedules

Account No. 199990-R   - DOE, JANET A   (Income Reporting)

No Taxable Income

EFile Forms

SSN	Employer ID	Employer Name	Type
000-00-0000	No Income	To change this, click on the No Taxable Income button and change your selection. Selecting the first option will nullify the No Income and bring the buttons back.	

Next   Quit

- Verify that the information is showing correctly.

- If you need to change the reason, Click on the No Taxable Income button and change your selection.

NOTE: *Selecting the first option will nullify the No Income and bring the buttons back.*

- Click Next to continue filing or Click Quit to cancel the filing.

The Tax Return Transcript screen will display:

2015 Tax Return Transcript

Account No. 199990-R   - DOE, JANET A   (Income Reporting)

Total of all Local wages cannot exceed total of Qualifying wages. If Toledo tax is withheld as a courtesy in addition to your tax paid to your work city, change the local wage for Toledo to zero.	
Taxable Income	0.00
Toledo Tax Liability	0.00
Credits:	
Toledo Tax Withheld By Employer(s)	0.00
Allowable Credit for Local Tax Paid To Other Cities	0.00
Payment On Declaration Of Estimated Tax & Amount Of Prior Year Credit[1]	0.00
Total Credits	0.00
Balance Due	0.00
Note: Any late filing penalty fees may be billed separately.	
Amount to be credited to 2015 Estimated Tax	0.00

[1] - does not include any Penalty & Interest payments that may have been made. Note: Underpayment of estimated tax will result in additional penalties.

[Continue (Refund)]   [Back]

- Verify that all of the information is showing correctly.

- Click [Continue (Refund)] to continue or Click [Back] to go back to the previous screen.

The Final Review Screen will display:

Individual Income Tax Web Filing

Account Number 199990-R   - DOE, JANET A

Review your 2015 Income Tax Return below. For final submission, check the Certification statement below, then click the Submit button by scrolling to the bottom of the screen.

Review as pdf in new window...

2015 City of Toledo Income Tax Return
Return Due 4/15/2016

                                                            Web Filing
                                              Filing Review - this form has not been submitted.

000-00-0000

199990-R   Phone: Daytime:
DOE, JANET A   Evening:
123 MAIN STREET
TOLEDO, OH 43615-7022

If the above address is incorrect, please contact
the tax department with correction.

	Taxes Paid Other Cities	Tax Withheld	Qualifying Wage
See Income WorkSheet(s)			
Totals $	0.00	0.00	0.00
Taxable Income			0.00
Toledo Tax (0.00%)			0.00

- Once all of the information has been verified, place a checkmark in the box stating:

"I certify I have examined this return and to the best of my knowledge it is true, correct and that the figures used herein are the same as for federal income tax purposes."

☑ certify I have examined this return and to the best of my knowledge

it is true, correct and that the figures used herein are the same

as for federal income tax purposes.

- Once checked, Click the **Submit»** button to continue.

- After submitting, it will return to the Existing EForms screen and your created form will display under the Available Forms section.

Existing EForms

Account No. 199990-R   -DOE, JANET A   (Income Reporting)

If there isn't a form already in progress, click on *Start New Form* button

Available Forms

Account Number	Form	Year/Period	Status	
199990-R	1040	2015	**Awaiting Approval**	Review as pdf

Start New Form

Add W2: Add W2

- Click Add W2 if you have a W2 that you would like to add.

W2 Information

Account No. 199990-R · DOE, JANET A   (Income Reporting)

* indicates required field.

Note: In order to add additional localities, click on Save and then the Add Localities button will be available to add additional localities. When you are done with this form click the Done button.

* Employer ID (EIN) Box b		* Wages, tips and other compensation Box 1	
* Employer Name:		* Social Security Wages Box 3	
* Employer Address:		* Medicare Wages & tips Box 5	
Employer Address #2:		First Local Wages, Tips, etc Box 18	
* Employer City:		First Local Income Tax Box 19	
* Employer State:	-Please select-State	First Locality Name Box 20	-Please select-Locality
* Employer ZipCode:		Second Local Wages, Tips, etc Box 18	
* Employee SSN: Box d	000-00-0000	Second Local Income Tax Box 19	
		Second Locality Name Box 20	-Please select-Locality

Save   Cancel

Additional Localities

Name	Wages	Income Taxes

(*) indicates required field.

Employer ID (EIN) (Box b):

- Enter the Employer ID (EIN) from Box b on the W2.

Employer Name:

- Enter the Employer Name as displayed on the W2

Employer Address:

- Enter in the Employer Address as displayed on the W2.

Employer Address #2:

- Enter in any additional address information such as Floor #, Suite #. Etc.

Employer City:

- Enter in the Employer's City.

Employer State:

- Select Employer's State from the Drop Down list.

Employer Zip Code:

- Enter in the Employer's Zip Code.

Employee SSN (Box d):

- Enter in your SSN as it is displayed in Box d on the W2.

Wages, tips and other compensation (Box 1):

- Enter in the dollar amount for Wages, tips and other compensation from Box 1 on the W2.

Social Security Wages (Box 3):

- Enter in the dollar amount for Social Security Wages from Box 3 on the W2.

Medicare Wages & tips (Box 5):

- Enter in the dollar amount for the Medicare Wages & tips from Box 5 on the W2.

First Local Wages, Tips, etc (Box 18):

- Enter in the dollar amount for First Local Wages, Tips, etc from Box 18 on the W2.

First Local Income Tax (Box 19):

- Enter in the dollar amount for First Local Income Tax from Box 19 on the W2.

First Locality Name (Box 20):

- Select the First Locality Name from the Drop Down list as displayed on the W2 in Box 20.

Second Local Wages, Tips, etc (Box 18):

- Enter in the dollar amount for Second Local Wages, Tips, etc from Box 18 on the W2.

Second Local Income Tax (Box 19):

- Enter in the dollar amount for Second Local Income Tax from Box 19 on the W2.

Second Locality Name (Box 20):

- Select the Second Locality Name from the Drop Down List as displayed in Box 20 on the W2.

    NOTE: In order to add additional localities, click on Save and then the Add Localities button will be available to add additional localities. When you are done with this form click the Done button.

- Click **Save** to Add the W2 or Click **Cancel** to Exit the W2.

Add W2G: Add W2G

- Click Add W2G if there is a W2G you would like to add.

W2G Information

Account No. 199990-R   - DOE, JANET A   (Income Reporting)

(*****) indicates required field.

Payer ID (FIN) (Box b):

- Enter in the Payer ID (FIN) from Box b on the W2G.

Payer Name:

- Enter in the Payer Name as displayed on the W2G.

Payer Address:

- Enter in the Payer Address as displayed on the W2G.

Payer Address #2:

- Enter in any additional address information such as Floor #, Suite #. Etc.

Payer City:

- Enter in the Payer's City.

Payer State:

- Select the Payer's State from the Drop Down List.

Payer Zip Code (Box 1):

- Enter in the Payer's Zip Code from Box 1 on the W2G.

SSN (Box 9):

- Enter in your SSN as displayed in Box 9 on the W2G.

Gross Winnings (Box 1):

- Enter in the dollar amount of Gross Winnings from Box 1 on the W2G.

Local Winnings (Box 16):

- Enter in the dollar amount of Local Winnings from Box 16 of the W2G.

Local Income Tax (a) (Box 17):

- Enter in the dollar amount of Local Income Tax (a) from Box 17 on the W2G.

Locality Name (Box 18):

- Select the Locality Name, as displayed in Box 18 of the W2G, from the Drop Down List.

- Click Save to Add the W2G or Click Cancel to Exit the W2G.

Add 1099 Misc: Add 1099 Misc

- Click Add 1099 Misc if there is a 1099 Misc you would like to add.

1099 Information

Account No. 199990-R   - DOE, JANET A   (Income Reporting)

* indicates required field.

* Payer ID (FIN)		* Recipient's SSN:	000-00-0000
* Payer Name:		* Nonemployee Compensation Box 7	
* Payer Address:			
Payer Address #2:			
* Payer City:			
* Payer State:	-Please select-State		
* Payer ZipCode			

Save   Cancel

(*****) indicates required field.
Payer ID (FIN):

- Enter the Payer ID (FIN) from the 1099 Misc.

Payer Name:

- Enter in the Payer Name as displayed on the 1099 Misc.

Payer Address:

- Enter in the Payer Address as displayed on the 1099 Misc.

Payer Address #2:

- Enter in any additional address information such as Floor #, Suite #. Etc.

Payer City:

- Enter in the Payer City as displayed on the 1099 Misc.

Payer Zip Code:

- Enter in the Payer Zip Code as displayed on the 1099 Misc.

Recipient's SSN:

- Enter in your SSN as displayed on the 1099 Misc.

Nonemployee Compensation (Box 7):

- Enter in the dollar amount for Nonemployee Compensation from Box 7 on the 1099 Misc.

- Click Save to Add the 1099 Misc. or Click Cancel to Exit the 1099 Misc.

Schedule C: Schedule C

- Click Schedule C if there is a Schedule C you would like to add.

- Small Business Profit/Loss Tax Web Filing
- Schedule C – Income to report from self-employment, independent contracting, freelancing or consulting during the year

Remember: each Schedule C is for the profit or loss from just one business, so if you had more than one business, you'll need a Schedule C screen for each of them.

* indicates required field.

* Principal Business or Profession Box a	
* Employer ID (EIN) Box d	
* SSN: Box d	000-00-0000 ⌄
* Business Name. If no separate business name, leave blank.	
* Business Address (including suite or room no.)	
* Business City	
* Business State	-Please select-State ⌄
* Business Zip Code	
* Net Profit or Loss Line 31	
Cost of Goods Sold Line 42	
Commissions And Fees Line 10	
Contract Labor Line 11	
Does the Cost of Goods Sold include Wages Paid to Employee(s)? Line 33	○ Yes ○ No
Wages paid out to Employee(s)	

Save   Cancel

NOTE: Each Schedule C is for the profit or loss from just one business, so if you had more than one business, you will need a Schedule C screen for each of them.

(*****) indicates required field.

Principal Business or Profession (Box a):

- Enter in the Principal Business or Profession.

Employer ID (EIN) (Box d):

- Enter in the Employer ID (EIN).

SSN (Box d):

- Enter in the SSN.

Business Name. If no separate business name, leave blank:

- Enter in the Business Name.

Business Address (including suite or room no.):

- Enter in the full Business Address.

Business City:

- Enter in the Business City.

Business State:

- Select the Business State from the Drop Down List.

Business Zip Code:

- Enter in the Business Zip Code.

Net Profit or Loss (Line 31):

- Enter in the dollar amount of Net Profit or Loss.

Cost of Goods Sold (Line 42):

- Enter in the dollar amount of the Cost of Goods Sold.

Commissions And Fees (Line 10):

- Enter in the dollar amount of Commissions and Fees.

Contract Labor (Line 11):

- Enter in the dollar amount of Contract Labor.

Does the Cost of Goods Sold include Wages Paid to Employee(s)? (Line 33):

- Select Yes or No if the Cost of Goods include Wages Paid to Employee(s).

Wages paid out to Employee(s):

- Enter the dollar amount of Wages paid out to Employee(s).

- Click Save to Add the Schedule C or Click Cancel to Exit the Schedule C.

Schedule E: Schedule E

- Click Schedule E if there is a Schedule E you would like to add.
- Income from Rental Real Estate during the year.
- You will need to fill out a separate Schedule E for each Rental Property.

Income from rental real estate during the year. You need to fill out a separate Schedule E for each rental property.

* indicates required field.

* Federal ID (SSN) Line A	000-00-0000 ▾
* Rental Address Line 26	
* Rental City Line 26	
* Rental State	-Please select-State ▾
* Rental ZipCode Line 26	
* Total Rental Real Estate or Royalty Income (or Loss) Line 26	

Save   Cancel

(*****) indicates required field.

Federal ID (SSN) (Line A):

- Enter in the Federal ID (SSN).

Rental Address (Line 26):

- Enter in the full Rental Address.

Rental City (Line 26):

- Enter in the Rental City.

Rental State:

- Select the Rental State from the Drop Down List.

Rental Zip Code (Line 26):

- Enter in the Rental Zip Code.

Total Rental Real Estate or Royalty Income (or Loss) (Line 26):

- Enter in the dollar amount of Total Rental Real Estate or Royalty Income (or Loss).

- Click Save to Add the Schedule E or Click Cancel to Exit the Schedule E

Schedule F: Schedule F

- Click Schedule F if there is a Schedule F you would like to add.
- Income from Farming during the year.

Income from farming during the year.

* indicates required field.

* Principal Crop or Activity Line A	
* Employer ID (EIN) Line D	
* SSN: Box d	000-00-0000 ▾
* Net Profit or Loss Line 9	
Does this include Wages Paid to Employee(s)? Line 33	○ Yes ○ No
Wages paid out to Employee(s)	

Save   Cancel

(*****) indicates required field.

Principal Crop Activity (Line A):

- Enter the Principal Crop Activity.

Employer ID (EIN) (Line D):

- Enter the Employer ID (EIN).

SSN (Box d):

- Enter the SSN.

Net Profit or Loss (Line 9):

- Enter in the dollar amount of Net Profit or Loss.

Does this include Wages Paid to Employee(s)? (Line 33):

- Select Yes or No if it includes Wages Paid to Employee(s).

Wages paid out to Employee(s):

- Enter the dollar amount of Wages paid out to Employee(s).

- Click Save to Add the Schedule F or Click Cancel to Exit the Schedule F.
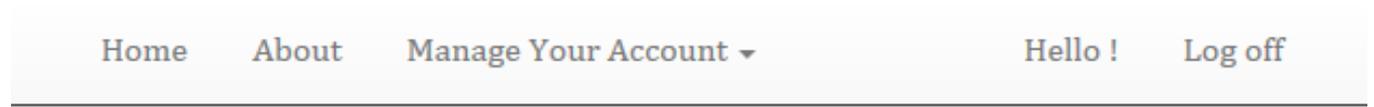
Tax Menu: Contact

- Under the Tax Menu, Click **Contact**

- The Contact option will display the contact information for the tax department.

The Tax Department Contact Information listed includes:

- **City Name**
- **Address**
- **Phone Number**
- **Fax Number**
- **Email**
- **Link to Tax Forms and Information**

Main Screen: Menu Bar

- **Home** – The Home button will take you back to the Account Summary Screen.

- **About** – The About button will pull up the contact information for the Tax Department.

- **Manage Your Account** – The Manage Your Account button will allow users to Change their Password
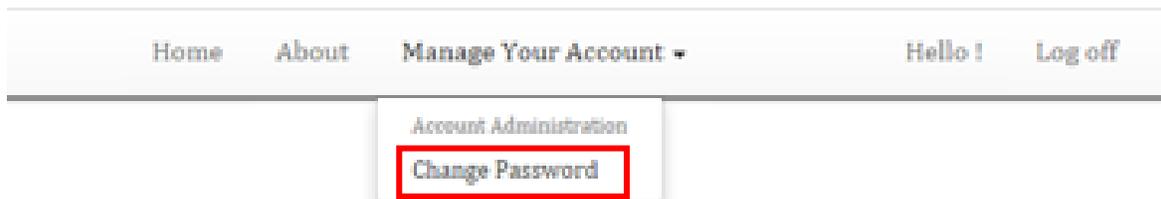
- To Change the Account Password, Click on Manage Your Account and select Change Password.

The following Change Password Screen will appear:

Change Password.

Change Password Form

Current password	[ ]
	Password must be 8 characters or longer, contain an uppercase character, a number, and a special character such as # $ % @ or &.
New password	[ ]
Confirm new password	[ ]
	[Change password]

- Enter the Current Password (Case Sensitive).

- Enter the New Password (Case Sensitive).

- Confirm the New Password (Case Sensitive).

NOTE: *Password MUST be 8 characters or longer, contain an uppercase character, a number, and a special character such as # $ % @ or &.*

- Click [Change password] .

Hello! – By Clicking the Hello (Account Name) ! button, it will take you back to the Account Summary Screen.

Log Off – The Log Off button will log you out of your Tax Connect session.