Berkheimer Online Tax Portal (Taxpayer)

Table Of Contents

INTRODUCTION

Berkheimer Online Tax Portal Overview

The Berkheimer Online Tax Portal enables a taxpayer or a tax preparer to file a Local Earned Income Tax Return online. If payment is required for the tax return, payment can be made by direct debit from a bank account. If a tax refund is indicated, the user can designate if the refund is to be mailed or credited to next year's tax return. If no preferred designation is chosen, a refund check will automatically be mailed, if due, as noted in the Local Taxpayer's Bill of Rights.

Before filing an online tax return, a user must be a registered portal user and create a tax account. Users must have access to the taxpayer's W-2 form to complete the tax return. PA Schedule UE - Allowable Employee Business Expenses and one PA Schedule C - Profit or Loss from Business (Sole Proprietorship) can also be filed online if these forms are needed to complete a return.

You are eligible to file your Local Earned Income Tax return online for tax year 2006 if you:

1. Did not move during tax year 2006.

2. Do not have an out of state credit.

3. Did not work in the City of Philadelphia.

4. Are not filing for a previous tax year.

5. Do not require schedules other than a PA Schedule C (profit or loss) or PA Schedule UE (expenses).

6. Pay for your return in full through an ACH payment (electronic payment from your checking or savings account), if tax is due, at the time of submitting your return electronically.

ONLINE HELP

Purpose of Online Help

Online Help provides users with easily accessible assistance when using the Berkheimer Online Tax Portal. The primary focus of Online Help is to provide immediate answers for "how to" questions.

Accessing and Using Online Help

Use the table of contents to view topics in a logical order, as you would read a book. The table of contents shows the subjects covered and how Online Help is structured.

To access Online Help:

1. Click **HELP** in the **Account Options** menu in the left navigation bar of the page. Online Help displays.

2. Expand the table of contents by clicking the book icons in the left pane of the page. All topics display in a pre-defined sequence.

3. Select a topic from the table of contents. The topic displays in the right pane.

4. Select additional topics as needed.

5. Use the **Back** and **Forward** arrows on the browser toolbar to move between topics.

6. Close the navigation pane (left pane) by clicking the "**X**." If the navigation pane is closed, access the Contents and Search by clicking the related buttons.

Search Feature

Use the search feature to search for topics on Online Help.

1. Click **[Search]** at the top of the Help page. The search field displays in the left pane.

2. Type the word or words to search in the blank field.

3. Click **[GO]**. Topics display in the left pane.

4.   Select the required topic. The topic information displays in the right pane.

Features of Online Help

"See Also" topics are accessed by clicking a **[See Also]** button for a topic. A pop-up displays listing related topics. Select a related topic to display the topic information.

PAGE AND NAVIGATION OVERVIEW

Certain conventions are used in Online Help to describe the Berkheimer Online Tax Portal pages and navigation. The following is a summary of their use and meaning:

Option	Description
Bold	Bolding is used for field names, tabs, buttons, and icons. When using Online Help, look for the **Bold** words to assist in performing tasks.
[ ]	Button names appear in brackets and are bold.
Click	A single press and release of the mouse button to select an item or option without moving the mouse pointer.
NOTES:	Notes contain important information about the fields or steps.
Scrolling	Using the mouse to move up and down on a page or within a grid to view additional data that does not currently display on the page.
Text Link	Specific text that links to a document or form associated with the page or links to another page or pop-up.
Red Asterisk *	A red asterisk following a field name indicates this is a required field. Data must be entered in the field before clicking **[Update]** or **[Apply]**.

BUTTONS AND ICONS

Multiple buttons and icons are used in the Berkheimer Online Tax Portal. The following is a summary of their use and meaning:

Button or Icon	Description
Accounts	Displays the user's accounts on the Tax Accounts page
[Add]	Adds a new form
[Apply]	Saves information entered and the user remains on the current page
[Cancel]	Discards changes and exits the page or pop-up
[Close]	Closes the current page or pop-up
[Continue]	Continues to the next step or page
[Create] or **[Create Account]**	Creates a new tax account
[Delete]	Deletes a form (such as a W-2 form)
Delete	Deletes information
Edit	Enables the user to edit or modify information
[Finish]	Ends the work that a user can do on a form
Forms	Displays the Tax Form Selection page
HELP	Displays Online Help
[Log Out]	Logs the user out of the Berkheimer Online Tax Portal
[Next]	Proceeds to the next page of the group
[Next Step]	Saves changes and goes to the next step
[Previous]	Returns to the previous page of the group
My Profile	Displays the user profile on the My Profile page

Button or Icon	Description
[Return]	Returns to the previous page viewed without updating the current page
	Indicates the user's current step in the tax filing process
	Indicates a form or step that has been completed
Tax Help	Displays detailed tax information about a form or steps
[Update]	Saves information and exits the current page
[Update Profile]	Updates the user profile
[Validates]	Validates information entered on the page with information in the tax database

PRINTED MANUAL

The Berkheimer Online Help Manual provides an Adobe PDF document of all Online Help topics. The manual can be printed directly from the home page by clicking the Manual link on the Berkheimer Online Tax Portal home page.

Structure

The manual is divided into chapters and topics. Topics explain how to navigate through the tax portal and complete the steps necessary to submit a tax return.

Topics in the manual:

- Include brief overviews of pages, menus, and main functions.

- Define fields, icons, and buttons that appear on the pages.

- Explain how to navigate to pages and complete each function through step-by-step procedures.

TAX FILE OPTIONS

The Tax File Options menu displays in the upper left navigation bar of the Berkheimer Online Tax Portal home page after a user successfully logs in and creates a tax account.

Option buttons display on the left side of the portal page for each step a user must complete to file a tax return. The amount and type of buttons display according to user selections on the Tax Accounts page and the Form Selection page. A button is enabled for a step only when the user can progress to that step. Disabled buttons indicate steps that still need to be completed.

 A blue arrow in a button indicates the current step.

 A green check mark in a button indicates that step or form is completed. Users can click a button with a green check mark to return to a previous step.

The following option buttons display for all tax accounts but may be disabled at different stages of the user's progress in filing a tax return:

Tax Return: The Tax Return option displays the Address tab of the Tax Return page for the selected tax account. A user can add, modify, or delete information on the tax return as needed. All required fields must be completed.

W-2: The W-2 option displays the W-2 page and enables the user to add, modify, or delete information from the W-2 form.

File Return: The File Return option displays the File Return page where the user can preview information listed in the tax return, accept the information, and submit the tax return.

Review and Print: The Review and Print option displays the Review and Print page where the user can review information in the tax return and then print it.

The following option buttons display only if the user selects the associated option on the Form Selection page:

PA Schedule UE: The PA Schedule UE option displays the PA Schedule UE page that enables the user to complete an online PA Schedule UE form for Allowable Employee Business Expenses.

PA Schedule C: The PA Schedule C option displays the PA Schedule C page that enables the user to complete an online Schedule C form, Profit or Loss from Business.

ACCOUNT OPTIONS

The Account Options menu displays in the lower left area of the Berkheimer Online Tax Portal after a user creates a tax account.

There are four options on the Account Options menu. Each option is a text link to the appropriate page:

Tax Accounts: The Tax Accounts option displays the Tax Accounts page where the user can add, modify, or delete a tax account.

Forms: The Forms option displays the Form Selection page where the user can select a form to complete for the tax account and access additional information about the form. Three forms are available: W2, PA Schedule UE, and PA Schedule C.

My Profile: The My Profile option displays the My Profile page where the user can update information provided when a tax account was created, such as the user's name, address, email address, and password.

HELP: The Help option provides the user with access to online help.

MY PROFILE PAGE

The My Profile page displays information provided during registration. The page lists the user's name, address, phone number, and email address. Required fields are marked with an asterisk and include the user's name, email address, and phone number. The user can update information on the My Profile page at any time. The page can also be used to change the user's password.

To update My Profile information:

1. Select **My Profile** text link from the **Account Options** menu. The My Profile page displays.

2. Add, modify, or delete information in the appropriate fields, as needed. All fields marked with a red asterisk are required.

3. Click **[Update Profile]** to save the changes.

   OR

   Click **[Cancel]** to exit the page without saving changes.

To change an existing password:

1. Click the **My Profile** link in the **Account Options** menu. The My Profile page displays.

2. Enter the new password in the **New Password** field and the **Confirm New Password** field. The password must be between 6 and 15 characters long.

3. Click **[Update Profile]** to save the changes.

   OR

   Click **[Cancel]** to exit the page without saving changes.

USER LOGIN

A user logs in to the Berkheimer Online Tax Portal to review, revise, or complete a Local Earned Income Tax Return or obtain tax-related information. A user must first create an account and receive a password. After receiving the system-generated password in email, the user may then log in to the portal.

To log in to the Berkheimer Online Tax Portal from the home page:

1. Enter the user's email address in the **Email** field of the **User Login** section of the home page.

2. Enter the user's account password in the **Password** field.

3. Click **[Login]**. The Tax Accounts page displays if the user is logging in for the first time. The Tax File Options and Account Options menus display if the user previously logged in and entered information for a tax account.

Creating a New Account

A New Account is added when a user wishes to gain access to the Berkheimer Online Tax Portal for the purpose of entering taxpayer information and submitting a tax return.

To add a new user account:

1. Click the **create new account** text link in the **User Login** area of the home page. The user account information pop-up displays.

2. Enter the following required user information:

   - **First Name**

   - **Last Name**

   - Valid **Email** address

   - **Phone #**

3. The remaining information may be entered, but is not required.

4. Click **[Create Account]**. The New Account page displays with a message indicating that the account was successfully created and the password will be sent to the user's email address.

   OR

   The New Account page displays with a message indicating that the email address already exists in the system.

Password Management

A user may wish to reset an account password for personal reasons or because a password was forgotten.

To obtain a new password:

1. Click the **here** text link in the **User Login** area of the home page. The **Email Forgot/Reset Password** pop-up displays.

2. Enter the user email address. The new system-generated password is sent to the email address.

To change an existing password:

1. Log in to the Berkheimer Online Tax Portal.

2. Click the **My Profile** link in the Account Options menu in the left navigation bar of the page. The My Profile page displays.

   NOTE: My Profile does not appear in the Account Options menu until an account is created.

3. Enter a new password in the **New Password** field.

4. Enter the new password in the **Confirm New Password** field.

5. Click **[Update Profile]**. My Profile page displays with a message indicating that the record updated successfully.

TAX ACCOUNTS PAGES

The Tax Accounts pages are used to select, edit, delete, or validate an existing account, determine online tax filing eligibility, enter preliminary taxpayer information, or add a new tax account. Once information has been entered and validated, Tax File Options buttons and Account Options links display in the left navigation bar of the page.

After a tax return has been filed, the user can download an Adobe® PDF copy of the tax return directly from the Tax Accounts Selection page. Adobe® Reader® must be installed on the user's computer to view, download, save, and print the filed tax return.

TAX ACCOUNTS SELECTION PAGE

The Tax Accounts Selection page enables a user to select a tax account for processing. Tax accounts can also be added, edited, or deleted from this page. However, once a tax return is filed, it cannot be edited or deleted. The page displays the account name, Social Security number of the taxpayer, or taxpayers if it is a dual account, tax year, and date the tax return was filed. Clicking the date link in the Return Filed Download field enables the user to download, save, and print an Adobe® PDF copy of the filed tax return directly from the Tax Accounts Selection page.

To select a tax account for processing:

1. Click the **Select this account** text link associated with the account to be processed. The tax account information for the selected account displays in the upper-right corner of the page and the options available for that account display in the Tax File Options menu on the left side of the page

2. Click **[Continue]** to continue processing for the selected tax account. The first page of the first available option in the Tax File Options menu displays.

   OR

   Click **[Add]** to add a new tax account. The Tax Accounts Validation page displays.

   OR

   Click the 🖊 **Edit** icon to edit an existing account. The Tax Accounts Update page displays.

To delete an existing tax account:

1. Click the **✖** **Delete** icon. A warning message cautions the user that the action deletes the selected tax account and all associated records. The action cannot be reversed.

2. Click **[Delete]** to delete the tax account.

   OR

   Click **[Cancel]** to cancel deletion of the tax account and return to the Tax Accounts Selection page.

To download, save, and print a copy of a filed tax return:

1. Click the date link in the **Return Filed Download** field. The File Download page displays.

2. Follow the steps in the Reviewing and Printing the Tax Return topic.

Tax Accounts Validation

The Tax Accounts Validation page is used to determine if a Taxpayer SSN (Social Security number) is in the Berkheimer Online Tax Portal database. The Tax Accounts Validation page displays the first time a tax account is created or when the **[Add]** button is clicked on the Tax Accounts Selection page. All fields on the page are required to validate the tax account.

If the taxpayer's Social Security number is associated with another Social Security number in the database, a message prompts the user to enter the second person's Social Security number. A blank field displays for the user to enter the second Social Security number. Both Social Security numbers, the tax year, and the ZIP code are validated in the database before the new tax account is created.

To complete the Tax Accounts Validation page:

1. Enter the taxpayer's Social Security number in the **SS#** field.

2. Select the **Tax Year** from the drop-down list.

3. Enter the taxpayer's ZIP code in the **ZIP** field.

4. Click **[Validate]**. The Tax Account Eligibility Questionnaire page displays.

    OR

    Click **[Validate]**. The **SS# B** field displays if the taxpayer's Social Security number is associated with another Social Security number in the database.

    - Enter the second person's Social Security number in the **SS# B** field.

    - Click **[Validate]**. The Tax Account Eligibility Questionnaire page displays with the Social Security numbers of both taxpayers listed. Answers to the questions apply to both Social Security numbers.

    OR

    Click **[Reset]** to clear all existing field information and repeat steps 1 through 4 to validate a different tax account.

    OR

    Click **[Cancel]** to cancel Tax Accounts Validation and return to the Tax Accounts Selection page.

Tax Account Eligibility Questionnaire

The Tax Account Eligibility Questionnaire is used to determine a taxpayer's eligibility to file taxes online. If the account has a second taxpayer associated with the account, the answers apply to both taxpayers.

To complete the Tax Account Eligibility Questionnaire:

1. Select **Yes** or **No** for each of the eligibility questions.

2. Click **[Continue]**. One of the following will occur:

   - If the answers pass eligibility requirements, the Create Tax Account page displays.

   - If the answers do not pass eligibility requirements or a question has not been selected, the Tax Accounts Eligibility Questionnaire displays with error messages.

     NOTE: If a message displays telling the user that the taxpayer is not eligible for online tax filing, the taxpayer must file a standard paper tax return.

Setting Up a New Tax Account

The Create Tax Account page is used to enter new taxpayer account information. Required fields are marked with a red asterisk (*) and must be completed.

To complete the Create Tax Account page:

1. Revise the **Account Name** if needed. The **Account Name** field displays the current name on file for the primary taxpayer Social Security number. This is a required field and can be changed.

2. Ensure that the **SS# A** field is correct. The **SS# A** field displays the taxpayer's Social Security number. This is a display-only field.

3. If this is a dual account, ensure that the second person's Social Security number in the **SS# B** field is correct. This is a display-only field.

4. Ensure that the **Tax Year** field displays the selection made on the Tax Accounts Validation page.

5. Enter the taxpayer's ZIP code in the **ZIP** field. This is a required field.

6. Enter the second person's email address in the **Email Address** field. This is an optional field.

7. Click **[Create]**. The account is created and the Forms page displays. If a required field is blank, or information is not entered correctly, the page displays an error message.

FORMS

The Forms pages of the Berkheimer Online Tax Portal are used to enter tax-related information about the taxpayer and spouse, if married. The forms currently accepted are the W-2, PA Schedule UE, and PA Schedule C. Instructions are provided for each form. When a check box is checked on the Form Selection page, the appropriate form selection button appears in the Tax File Options menu in the left navigation bar of the page. When a form is selected on the Form Selection page, that form must be completed in order to file the taxpayer's tax return.

Form Selection Page

Selections made on the Form Selection page determine what forms must be completed in order to file a tax return. The following forms are available: W-2, PA Schedule UE, PA Schedule C. Clicking the form-name text link beside the check box displays a PDF version of the form and instructions to complete the form. If a form is selected on the Form Selection page, an associated form button displays in the Tax File Options menu.

To add a form for a tax return and a form button to the Tax File Options menu:

1. Click the check box associated with the form. A check mark displays in the check box.

2. Click **[Continue]**. The appropriate tax form button displays in the Tax File Options menu.

    OR

    Click **[Return]**. The previous page displays.

W-2

The W-2 page enables a user to report Wages and Tax deductions reported by a taxpayer's employer on a Form W-2. A Form W-2 is required from each employer for the tax year for each taxpayer. The user must have a copy of the taxpayer's employer-provided Form W-2 before proceeding with online filing. A taxpayer may have more than one Form W-2.

The W-2 is accessed from the **[W-2]** button in the Tax File Options menu. Clicking the **[W-2]** button displays one of the following pages:

- If this is the first W-2, the page displays with the **[Add]** button, and the **[Continue]** button.

- If a W-2 was previously entered, the W-2 page displays with the **[Add]** button, the **[Continue]** button, and a grid displaying previously created W-2 forms.

Buttons and Icons

Click the ⓠ **W-2 Information** text link in the upper right corner of the page for detailed information about Form W-2.

The following buttons and icons are available for the W-2 page and have similar functions on the PA Schedule UE and PA Schedule C:

- **[Add]:** The **[Add]** button displays a blank W-2 except for sections d and e that contain taxpayer information from the database.

- **[Continue]:** The **[Continue]** button displays the first page of the next available option in the Tax File Options menu.

- ✏ **Edit:** Clicking the **Edit** icon displays the associated W-2 in edit mode. This icon permits modification of previously entered information.

- ✖ **Delete:** Clicking the **Delete** icon displays the associated W-2 along with a warning message and **[Delete]** and **[Cancel]** buttons. The delete warning message cautions the user that the action will delete the W-2 and any associated Schedule UE form and cannot be reversed.

- The user can click **[Delete]** to continue with the delete process or click **[Cancel]** to re-display the W-2 Form Selection page without deleting the selected form.

Accessing the W-2

To access an existing W-2:

1. Click **[W-2]** in the **Tax File Options** menu in the navigation bar on the left side of the portal page. The W-2 List page displays.

2. Click the ✏ **Edit** icon associated with the appropriate W-2. The W-2 form displays in edit mode.

   OR

   Click the ✖ **Delete** icon associated with the appropriate W-2. The W-2 displays with a delete warning message.

To access a new W-2:

1. Click **[W-2]** in the **Tax File Options** menu in the navigation bar on the left side of the portal page. If one or more W-2 forms exist, the W-2 List page displays. If no W-2 exists, the W-2 Add page displays.

2. Click **[Add]**. A blank W-2 displays, ready for data entry.

Completing the W-2

Before entering information into the online W-2, verify that the information on the employer-provided Form W-2 matches the Name, Social Security number, and Tax Year on the Tax Account in the upper right corner of the form. The W-2 Selection page displays a list of all W-2 forms added for a tax account. W-2 forms can be added, modified, or deleted from the W-2 Selection page.

NOTE: All monetary entries, including zero values, must be made in dollars and cents without commas. Rounding to whole numbers is not permitted. For example, forty-two thousand, four hundred fifty-six dollars and seventy-five cents is entered as 42456.75, and an entry of zero is entered as 0.00.

Fields and W-2 Information

Click the 💬 **W-2 Information** text link in the upper right corner of the page for detailed information about Form W-2.

The W-2 page has the following fields:

- **Boxes b and c:** Boxes b and c permit entry of employer information.

- **Boxes d and e:** Boxes d and e display the taxpayer information currently in the database.

- **Boxes 1 through 11:** Boxes 1 through 11 permit entry of income received and taxes paid.

- **Boxes 12a through 12d:** Boxes 12a through 12d permit entry of deferred compensation codes and amounts. The drop-down list permits selection of a letter code from A to V. Other codes are available, but should not be selected. The amount of compensation for a code is entered in the associated amount field.

- **Box 13:** Box 13 permits selection of further information utilized in tax preparation. See Box 13 help for more specific examples.

- **Box 14:** Box 14 is used by the employer to notify a taxpayer of other deductions made from wages. This includes such items as union dues and works clothes. See Box 14 help for more specific examples.

- **Boxes 15 through 20:** Boxes 15 through 20 permit entry of state and local income tax information. The Locality Name entered in Box 20 is the name of the locality where the taxpayer lives.

To complete an existing W-2:

1. Click **[W-2]** in the **Tax File Options** menu. The W-2 Selection page displays a list of W-2 forms that exist for the tax account.

2. Click the 🖉 **Edit** icon for the appropriate W-2 form. The W-2 displays.

3. Enter or revise values in all required fields and any optional fields as needed.

4. Click **[Apply]** to save changes to the W-2 form. The W-2 form can be edited, if needed, at a later date.

   OR

   Click **[Finish]** to indicate that work on the W-2 is finished.

   OR

   Click **[Cancel]** to cancel work on the W-2.

PA SCHEDULE UE

The PA Schedule UE enables a taxpayer to report allowable Pennsylvania unreimbursed business expenses. The online form is divided into seven tabs, which correspond to the expense category parts of the paper form. An eighth tab, labeled Totals, contains the calculated totals for each part. The Totals tab provides the capability to enter any Reimbursements to be subtracted from the total allowable employee business expenses, resulting in the net expense or reimbursement.

Required fields are marked with a red asterisk (*). Totals cannot be manually entered. They are calculated by the portal and updated each time the form is saved.

The expense categories of the online PA Schedule UE are:

Part A: Direct—For Direct Employee Business Expenses

Part B: Travel—For Business Travel Expenses

Part C: Miscellaneous—For miscellaneous expenses as they relate to your employment

Part D: Office or Work—For office or work area expenses if required by your employer

Part E: Moving—For non-reimbursed moving expenses related to employment

Part F: Education—For non-reimbursed education expenses required by your employer

Part G: Depreciation—For depreciation of property used for employment

Accessing PA Schedule UE

To access an existing PA Schedule UE:

1. Click **[PA Schedule UE]** in the **Tax File Options** menu in the navigation bar on the left side of the portal page. The PA Schedule UE List page displays.

2. Click the ✎ **Edit** icon associated with the appropriate PA Schedule UE. The PA Schedule UE page displays in edit mode.

   OR

   Click the ✖ **Delete** icon associated with the appropriate PA Schedule UE. The PA Schedule UE displays with a delete warning message.

To access a new PA Schedule UE:

1. Click **[PA Schedule UE]** in the **Tax File Options** menu in the navigation bar on the left side of the portal page. If one or more PA Schedule UE forms exist, the PA Schedule UE List page displays. If no PA Schedule UE exists, the PA Schedule UE Add page displays.

2. Click **[Add]**. A new PA Schedule UE form displays, ready for data entry.

Completing PA Schedule UE

The online PA Schedule UE provides a convenient means to enter unreimbursed business expenses into the Berkheimer Online Tax Portal for inclusion in the tax return. The PA Schedule UE page consists of introductory information and eight tabs. Each of the first seven tabs corresponds to a section of the paper PA Schedule UE. The eighth tab displays totals from all the sections of the schedule and provides space to enter any reimbursements to be subtracted from the total expenses.

Buttons and Schedule Information

Click the ⓘ **Schedule UE Information** text link in the upper right corner of the Schedule UE page to view an Adobe® PDF version of the schedule.

The following buttons are available for the PA Schedule UE:

- Each tab can be accessed directly by clicking the tab or sequentially by clicking **[Next]**. The user can move through the tabs in the reverse direction by clicking **[Previous].**

- Clicking **[Apply]** updates the total for the current page and leaves the page displayed for review.

- Clicking **[Finish]** updates the totals and displays the PA Schedule UE list page.

- Clicking **[Cancel]** displays the originating page without saving the changes.

  NOTE: When any button other than **[Cancel]** is clicked, all totals on the PA Schedule UE are updated.

To complete an online PA Schedule UE:

1. Click the **Part A Direct** tab. Part A, Direct Employee Business Expenses, displays.

2. Enter any allowable direct expenses.

3. Click **[Next]**. The fields for **Part B Travel** tab display.

4. Enter any allowable business travel expenses.

5. Click **[Next]**. The fields for **Part C Miscellaneous** tab display.

6. Enter any allowable PA business expenses not reported in step 1 or step 3, above.

7. Click **[Next]**. The fields for **Part D Office or Work Area** tab display.

8. Enter any allowable expenses for maintaining a required office or work area.

9. Click **[Next]**. The fields for **Part E Moving** tab display.

10. Enter any allowable moving expenses incurred to be within 35 miles of your workplace.

11. Click **[Next]**. The fields for **Part F Education** tab display.

12. Enter any allowable education expenses incurred to retain present job or position.

13. Click **[Next]**. The fields for **Part G Depreciation** tab display.

14. Enter any allowable depreciation expenses.

15. Click **[Next]**. The fields for **Totals** tab display.

16. Enter any reimbursement payments that are not included on Form W-2.

17. Click **[Finish]**. The PA Schedule UE List page displays listing the new PA Schedule UE.

PA SCHEDULE C

The PA Schedule C form enables a user to report income or loss from a business, or a profession, that the taxpayer operates as a sole proprietor. The online form is divided into five tabs that correspond to the sections of the paper form. Required fields are marked with a red asterisk (*). Totals cannot be manually entered. They are calculated by the portal when the form is saved.

The sections of the online PA Schedule C form are:

Business Information: Information that identifies the business, such as the main business activity, business name, and address.

Part 1 Income: The income from the business activity or profession, such as gross receipts or sales, returns and allowances, and other income, including interest earned from accounts receivable, and other business accounts.

Part II Deductions: PA allowable business or professional expenses that were incurred during the year.

C-1 Cost of Goods Sold: If applicable, report beginning inventory and cost of labor, materials, supplies, and other costs to produce, purchase, or sell merchandise.

C-2 Depreciation: This section is completed if the taxpayer is using a depreciation method other than the federal depreciation reported on the Federal Schedule C.

Accessing PA Schedule C

To access an existing PA Schedule C:

1. Click **[PA Schedule C]** in the **Tax File Options** menu in the navigation bar on the left side of the portal page. The PA Schedule C List page displays.

2. Click the ✎ **Edit** icon associated with the appropriate PA Schedule C. The PA Schedule C form displays in edit mode.

   OR

   Click the ✖ **Delete** icon associated with the appropriate PA Schedule C. The PA Schedule C displays with a delete warning message.

To access a new PA Schedule C:

1. Click **[PA Schedule C]** in the **Tax File Options** menu in the navigation bar on the left side of the portal page. If one or more PA Schedule C forms exist, the PA Schedule C List page displays. If no PA Schedule C exists, the PA Schedule C Add page displays.

2. Click **[Add]**. A new PA Schedule C form displays, ready for data entry.

Completing PA Schedule C

The online PA Schedule C provides a convenient means to enter income or loss from a sole proprietorship into the Berkheimer Online Tax Portal for inclusion in the tax return. The PA Schedule C page consists of introductory information and five tabs. Each of the tabs corresponds to a section of the paper PA Schedule C. All required fields are marked with a red asterisk (*).

Buttons and Schedule Information

Click the ❓ **Schedule C Information** text link in the upper right corner of the Schedule C page to view Adobe® PDF version of the schedule.

The following buttons are available for the PA Schedule C:

- Each tab can be accessed directly by clicking the tab, or sequentially by clicking **[Next]**. The user can move through the tabs in the reverse direction by clicking **[Previous]**.

- Clicking **[Apply]** updates the total for the current page and leaves the page displayed for review.

- Clicking **[Finish]** updates the totals and displays the PA Schedule C List page.

- Clicking **[Cancel]** displays the originating page without saving the changes.

  NOTE: When any button other than **[Cancel]** is clicked, all totals on the PA Schedule C are updated.

To complete an online PA Schedule C:

1. Click the **Business Information** tab. The Business Information fields display.

2. Enter required business information in fields A through D.

3. Select the appropriate option in lines E through H.

4. If option **Other** is selected in lines E and F, provide an explanation in the space provided.

5. Click **[Next]**. The **Part I Income** tab displays.

6. Enter gross receipts of sales in line **1a**, returns and allowances in line **1b**, and other income in line **4**.

7. Click **[Next]**. The **Part II Deductions** tab displays.

8. Enter applicable business deductions in lines **6** through **12**, **14** through **31**, and **34**.

9. Click **[Next]**. The **Schedule C-1- Cost of Goods Sold and/or Operations** tab displays.

10. Enter cost of goods sold and/or operations in lines **1** through **2b**, **3** through **5**, and **7**.

11. Click **[Next]**. The **Schedule C-2 - Depreciation** tab displays.

12. Enter applicable depreciation information in lines **1** and **2**, and **4a** through **4g** (for each Other Depreciation category), as appropriate, and line **6**.

13. Click **[Finish]**. The PA Schedule C List page displays listing the new PA Schedule C.

TAX RETURN

The Tax Return form enables a user to modify address information, verify and enter Local Earned Income Tax Return information, and finalize the tax filing process. Before the Tax Return form is accessed, the taxpayer's W-2 wage information must be completed. If applicable, the PA Schedule UE and PA Schedule C must also be completed. Information from these forms is used on the Tax Return form.

To access the Tax Return form:

1. On the Tax Accounts page, click the **Select this account** text link for the appropriate taxpayer account. The Tax Accounts page refreshes with the taxpayer information in the top right-hand corner of the page.

   NOTE: Verify that the Tax Account Name, Social Security number, and Tax Year are correct.

2. Click **[Tax Return]** in the Tax File Options section of the page. The Local Earned Income Tax Return form displays.

Accessing the Tax Return

The Tax Return can be accessed after the user completes all forms checked on the Form Selection page for the taxpayer. If no forms are selected on the Form Selection page, the user can access the Tax Return after logging in to the Berkheimer Online Tax Portal, selecting the tax account on the Tax Accounts page, and clicking the **[Tax Return]** button in the Tax File Options menu. If the Tax Return has been filed, the user can download the Tax Return by clicking the **[Review and Print]** button in the Tax File Options menu.

To access the Tax Return form for an existing account:

1. Log in to the Berkheimer Online Tax Portal. The Tax File Options and Account Options menus display in the left-hand navigation bar.

2. Click the **Tax Accounts** text link in the **Account Options** menu. The Tax Accounts page displays a list of existing accounts for the user.

3. Click the **Select this account** text link for the appropriate taxpayer account. The Tax Accounts page refreshes with the taxpayer information in the top right-hand corner of the page. Buttons display in the Tax File Options menu depending on previous form selections and the work completed on the forms.

4. Verify that the Tax Account Name, Social Security number(s), and Tax Year are correct.

5. Click **[Tax Return]** in the **Tax File Options** menu. The Local Earned Income Tax Return displays.

Completing the Tax Return

The Tax Return form is separated into three sections or tabs: Address section, Tax Return section, and Finish section. The sections are selected by clicking tabs at the top of the page or the **[Next]** and **[Previous]** buttons at the bottom of the page. All three sections of the Tax Return form must be completed before a tax return is filed.

Click the 🛈 **Tax Return Information** text link in the upper right corner of the page for detailed information about the Tax Return.

The following display-only fields are found on all Tax Return section pages:

- The user name and log-on information are located in the upper-left corner of the page. The taxpayer account information is located in the upper-right corner of the page, above the **Tax Return Information** icon.

- **Resident Jurisdiction:** The Resident Jurisdiction field displays the location of a taxpayer's residence. This is the name of the town or municipality. This is a display-only field. If the information is incorrect, please contact our office to request a new form, or make necessary changes on your paper copy and mail the completed return to P.O. Box 905, Bangor, PA 18013.

- **School District:** The School District field displays the name of the School District where the taxpayer lives. This is a display-only field. If the information is incorrect, please contact our office to request a new form, or make necessary changes on your paper copy and mail the completed return to P.O. Box 905, Bangor, PA 18013.

Completing the Address Tab

The Address Tab on the Tax Return permits a user to verify and update taxpayer contact information. The following fields display on the Tax Return Address Tab page:

Make corrections to my Name and Address: This field is a check box that is used to indicate a change to the taxpayer name or address information. This works the same as the check box on a paper return.

NOTE: The check box can be manually checked by the user when a change is made. If a change is made and the check box is not checked, the system automatically inserts a checkmark to indicate that information was changed.

Information in the following required fields automatically displays, but can be corrected by the user:

First Name: The First Name field displays the first name of the taxpayer.

Last Name: The Last Name field displays the last name of the taxpayer.

Address: The Address field displays the address of the taxpayer.

City: The City field displays the name of the city or town where the taxpayer resides.

State: The State field displays the name of the State where the taxpayer resides.

ZIP: The ZIP field displays the ZIP code where the taxpayer resides.

Home Phone: The Home Phone field displays the taxpayer phone number. This field may be blank but is a required field.

Filer Name (Other Than Taxpayer): The Filer Name field is used to enter the name of the person, other than the taxpayer, filing the tax return. This is an optional field.

Completing SS# Pages

The **SS#** tab displays the Social Security number of the taxpayer. If this is a dual account, a second **SS#** tab displays the Social Security number of the second taxpayer. Both pages must be completed.

The SS# page displays the Name, Address, and Phone Number of the taxpayer in the upper left-hand corner of the page and Social Security number in the right-hand corner of the page.

Click the ⊘ **Tax Return Information** text link in the upper right corner of the page to display an Adobe® PDF document explaining each line of the Local Earned Income Tax Return.

Fields

The following fields display on the SS# tab:

- **If you had NO EARNED INCOME:** The No Earned Income field is a drop-down list that contains reasons a person may not have income to report. Values include Disabled, Deceased, Homemaker, Unemployed, Student, Military, and Retired. The field defaults to blank. This is a required field.

- **Line 1:** Line 1 automatically displays the Gross Earnings from the W-2. This is a display-only field.

- **Line 2:** Line 2 automatically displays the Allowable Non-reimbursed Employee Business Expenses from PA Schedule UE. This is a display-only field.

- **Line 3:** Line 3 automatically displays the Taxable W-2 Earnings, the result of the calculation of Line 1 minus Line 2. This is a display-only field.

- **Line 4:** Line 4 automatically displays the Net Loss from operating a business. The value that displays is calculated on the PA Schedule C. This is a display-only field.

- **Line 5:** Line 5 automatically displays the Subtotal, the result of the calculation of Line 3 minus Line 4. This is a display-only field.

- **Line 6:** Line 6 automatically displays the Net Profits from operating a business. The value that displays is calculated on the PA Schedule C. This is a display-only field.

- **Non-Taxable S-Corp earnings:** This check box is used to declare the Net Profits on Line 6 as non-taxable S-Corporation earnings.

- **Line 7:** Line 7 automatically displays the Total Earned Income. The value that displays is the result of the calculation of Line 5 plus Line 6. This is a display-only field.

- **Line 8:** Line 8 automatically displays the Tax Liability. The value that displays is the result of multiplying Line 7 by the current Tax Rate. This is a display-only field.

- **Line 9:** Line 9 permits a user to enter any Quarterly Estimated Payments made for the tax filing year. This is an optional field.

- **Line 10:** Line 10 automatically displays the Earned Income Tax Withheld. This value is taken from the State Income Tax box of the W-2. This field can be edited.

- **Line 11:** Line 11 permits a user to enter any Credit, the value of any tax overpaid the previous year that was designated as a credit for this tax filing year. This is an optional field.

- **Line 12:** Line 12 is currently not available.

- **Line 13:** Line 13 automatically displays the Total of lines 9, 10, and 11. This value is the sum of all taxes paid for the tax filing year. This is a display-only field.

- **Line 14:** Line 14 displays the Refund or Credit due the taxpayer. The value that displays is the result of the calculation of Line 13, tax paid, minus Line 8, tax owed. This is a display-only field if Line 13 is greater than Line 8.

- **Line 15:** Line 15 displays the Tax Due, the amount the taxpayer owes. The value that displays is the result of the calculation of Line 8, tax owed, minus Line 13, tax paid. This is a display-only field if Line 8 is greater than Line 13.

- **Line 16:** Line 16 permits a user to enter the value of Interest and Penalties. See **Tax Return Information** for additional information.

- **Line 17:** Line 17 displays the Total Amount Due. The value that displays is the sum of Line 15, Tax Due, and Line 16, Interest and Penalties. This is a display-only field.

To complete each SS# tab:

1. Complete or revise all required fields and any optional fields, if needed, on the Tax Return SS# tab.

2. Ensure that all values on the Tax Return SS# tab are correct.

3. Click **[Next]**. The next page of the Tax Return displays.

   OR

   Click **[Apply]** to save any changes in values displayed on the SS# tab.

   OR

   Click **[Cancel]** to cancel any additions or corrections to the value on the SS# tab.

FINISH PAGE

The Finish page enables the user to view summary information from the Tax Return, such as the taxpayer's first and last name, Social Security number, Total Taxable Income, Earned Income Tax Withheld, Tax Liability, Amount of Refund or Credit, and Amount Due.

If a dual Tax Return is being completed, information about both parties displays including the combined Total Refund/Credit and Total Amount Due. If a Total Refund or Credit is one dollar or more, the user can select to receive a credit to next year's taxes or to receive a refund.

Tax information cannot be edited on the Finish page; however, the user can click buttons in the Tax File Options menu to return to forms or the Tax Return to make corrections, if needed.

When all information has been reviewed on the Finish page, the user clicks **[Finish]** to indicate that all work on the Tax Return is completed.

To access the Finish page and finish work on the Tax Return:

1. Click the **Finish** tab on the Tax Return. The Finish page displays.

2. Review the summary Tax Return information on the Finish page.

3. If the Total Refund/Credit is $1.00 or more, click the **Credit to next year** check box at the bottom of the page.

   OR

   Click the **Refund** check box at the bottom of the page to receive a refund by mail.

   NOTE: If neither of the boxes are checked, a check will be mailed upon auditing the return, if a refund is due, as noted in the Local Taxpayer's Bill of Rights.

4. Click **[Finish]** to indicate that all work on the Tax Return is complete. The File Return page displays and the File Return button is available in the Tax File Options menu.

   OR

   Click **[Cancel]** to stop work on the Tax Return. Existing work on the Tax Return is saved and can be edited when you return to the Tax Return.

   OR

   Click **[Previous]** to return to previous pages of the Tax Return and review or edit the information, as needed.

   NOTE: Remember to click **[Apply]** to save any changes made to the Tax Return.

FILING THE TAX RETURN

Filing the Tax Return involves several steps. The pages that display depend on whether the taxpayer has a tax liability and owes a payment or whether a refund is indicated. The user must click the **[Finish]** button on the Finish tab of the Tax Return in order to obtain access to the File Return pages.

The File Return pages enable the user to complete the following steps:

- Accept the Tax Return

- Verify the amount of refund, if owed to the taxpayer

- Verify the amount of payment, if due from the taxpayer

- Submit a payment, if owed

- Review the filed Tax Return and print it

Accepting the Tax Return

Accepting the Tax Return is one step in the File Return process. When all sections of the Tax Return are completed and the user clicks **[Finish]** on the Finish tab, the last page of the Tax Return, the Tax Return is ready to be accepted. The user should carefully examine all sections of the Tax Return before accepting it. If any forms need to be reviewed or revised, the user can select one of the options in the Tax File Options menu and return to that form.

To accept the Tax Return on the File Return page:

1. Read the acceptance statement on the File Return page.

2. Click **[I Accept and Agree]** to accept the Tax Return.

   OR

   Click **[I DO NOT Accept or Agree]**. Information on the Tax Return or any of the forms can be edited.

Filing the Tax Return With Payment Due

All changes should be made to the Tax Return before beginning the File Return steps. When the user indicates that work on the Tax Return is finished, the Tax Return is ready to be filed. The File Return page displays and the **[File Return]** button is available in the Tax File Options. After the Tax Return is filed, it cannot be updated or deleted.

A statement on the File Return page verifies that the user has examined the Tax Return, that information on the Tax Return is correct and complete, and that the user is authorized to file the Tax Return if the user is not the taxpayer. In order to continue filing the online Tax Return, the user must click the **[I Accept and Agree]** button.

If the taxpayer has a tax liability, a payment can be processed by deducting directly from a checking or savings account by ACH (Automated Clearing House).

To file the Tax Return with a payment due:

1. Read the acceptance statement on the File Return page.

2. Click **[I Accept and Agree]** to accept and agree to the Tax Return. The File Return page displays the payment that is due.

   OR

   Click **[I DO NOT Accept or Agree]** to stop the Tax Return filing process. The Tax Return displays.

   NOTE: The user can click one of the Tax File Options buttons to review or make corrections on the Tax Return or any associated forms.

3. Click **[Continue Filing Return]**. The Process Payment part of the File Return page displays.

   NOTE: Once **[Continue Filing Return]** is clicked, the Tax Return and the associated W-2 and Schedule information cannot be edited. Click **[Cancel]** at any time to cancel processing of the payment.

4. Complete all fields on the File Return Process Payment page:

   - Enter the **Name on Account**. Enter the name of the bank account from which the payment is to be debited.

   - Select the **Account Type** from the drop-down list. Selections are **Checking** and **Savings**.

   - Enter the **Bank Account Number**.

   - Enter the **Routing Number** for the bank or financial institution.

5. Click **[Process Payment]** to begin processing the payment. A summary of the payment information displays.

6. Verify that all payment information is correct.

7. Click **[Submit Payment]** to submit the indicated payment. A message confirms that the Tax Return has been successfully filed and that the payment has been submitted.

   OR

   Click **[Change Payment]** to make changes to the payment information. The File Return Process Payment page displays.

   - Repeat Steps 4 through 6 to revise the payment information.

8. Click **[Done]**. The Tax Return **Download** text link displays and the **[Review and Print]** option button is available in the Tax File Options menu. The Tax Return is available to download, save, review, and print.

   NOTE: When the **[Done]** button is clicked, the Tax Return is filed, and it cannot be updated or deleted. The date the Tax Return is filed displays on the Tax Accounts Selection page. The Tax Return can be downloaded by clicking the date link in the **Return Filed Download** field.

Filing the Tax Return With a Refund

All changes should be made to the Tax Return before beginning the File Return steps. When the user indicates that work on the Tax Return is finished, the Tax Return is ready to be filed. The File Return page displays and the **[File Return]** button is available in the Tax File Options. After the Tax Return is filed, it cannot be edited or deleted.

A statement on the File Return page verifies that the user has examined the Tax Return, that information on the Tax Return is correct and complete, and that the user is authorized to file the Tax Return if the user is not the taxpayer. In order to continue filing the Tax Return online, the user must click the **[I Accept and Agree]** button.

If the user selects the **Refund** option on the Finish page of the Tax Return, a refund is mailed to the taxpayer after the Tax Return is filed.

To file the Tax Return and obtain a refund:

1. Read the acceptance statement on the File Return page.

2. Click **[I Accept and Agree]** to accept and agree to the Tax Return. The File Return page displays the refund amount.

   OR

   Click **[I DO NOT Accept or Agree]** to stop the Tax Return filing process. The Tax Return displays.

   NOTE: The user can click one of the Tax File Options buttons to review or make corrections to the Tax Return or any associated forms.

3. Click **[Continue Filing Return]**. A message confirms that the Tax Return has been successfully filed. A refund is mailed to the taxpayer.

   NOTE: Once **[Continue Filing Return]** is clicked, the Tax Return and the associated W-2 and Schedule information cannot be edited.

4. Click **[Done]**. The Tax Return **Download** text link displays and the **[Review and Print]** option button is available in the Tax File Options menu. The Tax Return is available to download, save, review, and print.

   NOTE: When the **[Done]** button is clicked, the Tax Return is filed, and it cannot be updated or deleted. The date the Tax Return is filed displays on the Tax Accounts Selection page. The Tax Return can be downloaded by clicking the date link in the **Return Filed Download** field.

Processing a Payment

Processing a Payment is one step in the File Return process if the taxpayer owes a payment. Amounts can be deducted directly from a checking or savings account by ACH (Automated Clearing House). In order to process a payment by ACH, the user must know the name on the account, type of account (checking or savings), account number, and routing number for the financial institution. A payment can be processed only after the user finishes work on the Tax Return and accepts the Tax Return.

To submit a payment that is due:

1. Read the acceptance statement on the File Return page.

2. Click **[I Accept and Agree]** to accept and agree to the Tax Return. The File Return page displays the payment that is due.

3. Click **[Continue Filing Return]**. The Process Payment part of the File Return page displays.

   NOTE: Once **[Continue Filing Return]** is clicked, the Tax Return and the associated W-2 and Schedule information cannot be edited. Click **[Cancel]** at any time to cancel processing of the payment.

4. Complete all fields on the File Return Process Payment page:

   - Enter the **Name on Account**. Enter the name of the bank account from which the payment is to be debited.

   - Select the **Account Type** from the drop-down list. Selections are Checking and Savings.

   - Enter the **Bank Account Number**.

   - Enter the **Routing Number** for the financial institution.

5. Click **[Process Payment]** to begin processing the payment. A summary of the payment information displays.

6. Verify that the payment information is correct, including the amount of the payment, Name on Account, Account Type, Bank Account Number, and Routing Number.

7. Click **[Change Payment]** to make changes to the payment information.

    OR

    Click **[Submit Payment]** to submit the indicated payment. A message confirms that the Tax Return has been successfully filed and that the payment has been submitted.

8. Click **[Done]**. The Tax Return **Download** text link displays and the **[Review and Print]** button is available in the Tax File Options menu. The Tax Return is available to download, save, review, and print.

    NOTE: When the **[Done]** button is clicked, the Tax Return is filed, and it cannot be updated or deleted. The date the Tax Return is filed displays on the Tax Accounts Selection page. The Tax Return can be downloaded by clicking the date link in the **Return Filed Download** field.

Reviewing and Printing the Tax Return

The Tax Return is available to view, download, save, and print after it is filed and the user clicks **[Done]** on the File Return page. After the Tax Return is filed, the Tax Return Download page displays and the **[Review and Print]** button is available in the Tax File Options menu. The user can also download and print an Adobe® PDF copy of the filed Tax Return from the Tax Accounts Selection page.

To view and print the Tax Return, the user must have Adobe® Reader® installed. A link to the Adobe web site is located on the Tax Return Download page.

To access the Tax Return Download page:

1. Click **[Review and Print]** in the **Tax File Options** menu. The Tax Return Download page displays.

    OR

    Click the date link in the **Return Filed Download** field for the appropriate tax account on the Tax Accounts Selection page. The Tax Return Download page displays.

To view and print the filed Tax Return from the Tax Return Download page:

1. Click the **Adobe® Reader®** logo to install Adobe® Reader®, if needed.

2. Click the Tax Return **Download** text link. The File Download pop-up displays.

3. Click **[Open]** to open the Tax Return and view it. The Adobe® Reader® window displays the Tax Return.

4. Click the **Print** icon in the toolbar. The Print pop-up displays.

   OR

   Select **Print** from the **File** menu. The Print pop-up displays.

5. Select the appropriate printer name and properties.

6. Click **[OK]**.

To save the Tax Return to a floppy disk or a computer:

1. Click the **Adobe® Reader®** logo to install Adobe® Reader®, if needed.

2. Click the Tax Return **Download** text link. The File Download pop-up displays.

3. Click the **Save** icon in the toolbar. The Save a Copy pop-up displays.

   OR

   Select **Save a Copy** from the **File** menu. The Save a Copy pop-up displays.

4. Browse to locate and select a floppy disk or drive location in the **Save in** field.

5. Enter a name for the Tax Return in the **File name** field.

6. Click **[Save]** to save the Tax Return.

   OR

   Click **[Cancel]** to cancel saving the Tax Return.

7. Click "**X**" in the upper right-hand corner of the Adobe® Reader® window to close the window and return to the Tax Return Download page.

   OR

   Select **Exit** from the **File** menu to close the Adobe® Reader® window and return to the Tax Return Download page.

GLOSSARY

The following terms are used in the Berkheimer Online Tax Portal:

Term	Definition/Function/Purpose
ACH Payment	Automated Clearing House payment. Used for making direct payments from a taxpayer's savings or checking account.
Employer Identification Number (EIN)	Identification number of the employer issuing the Form W-2. Assigned by the IRS in the format 00-0000000.
PA Schedule UE	Pennsylvania tax schedule used to claim allowable employee business expenses.
PA Schedule C	Pennsylvania tax schedule used to claim a profit or loss from a business operated as a sole proprietorship.
Tax Account	Taxpayer account. The taxpayer does not have to be the same individual as the user who is logged in to the portal.
User Login	Email address of the portal user. The user does not have to be the same individual as the taxpayer.
W-2	IRS form provided to employees, by employers, to report wages and taxes withheld from a taxpayer's salary.