Welcome to RBA Professional Data Systems, Inc.'s

Individual Taxpayers' eFiling Declarations Module

eFiling Release (3.2) Dated April 20, 2013

USERS' MANUAL

RBA PROFESSIONAL DATA SYSTEMS

Software Documentation

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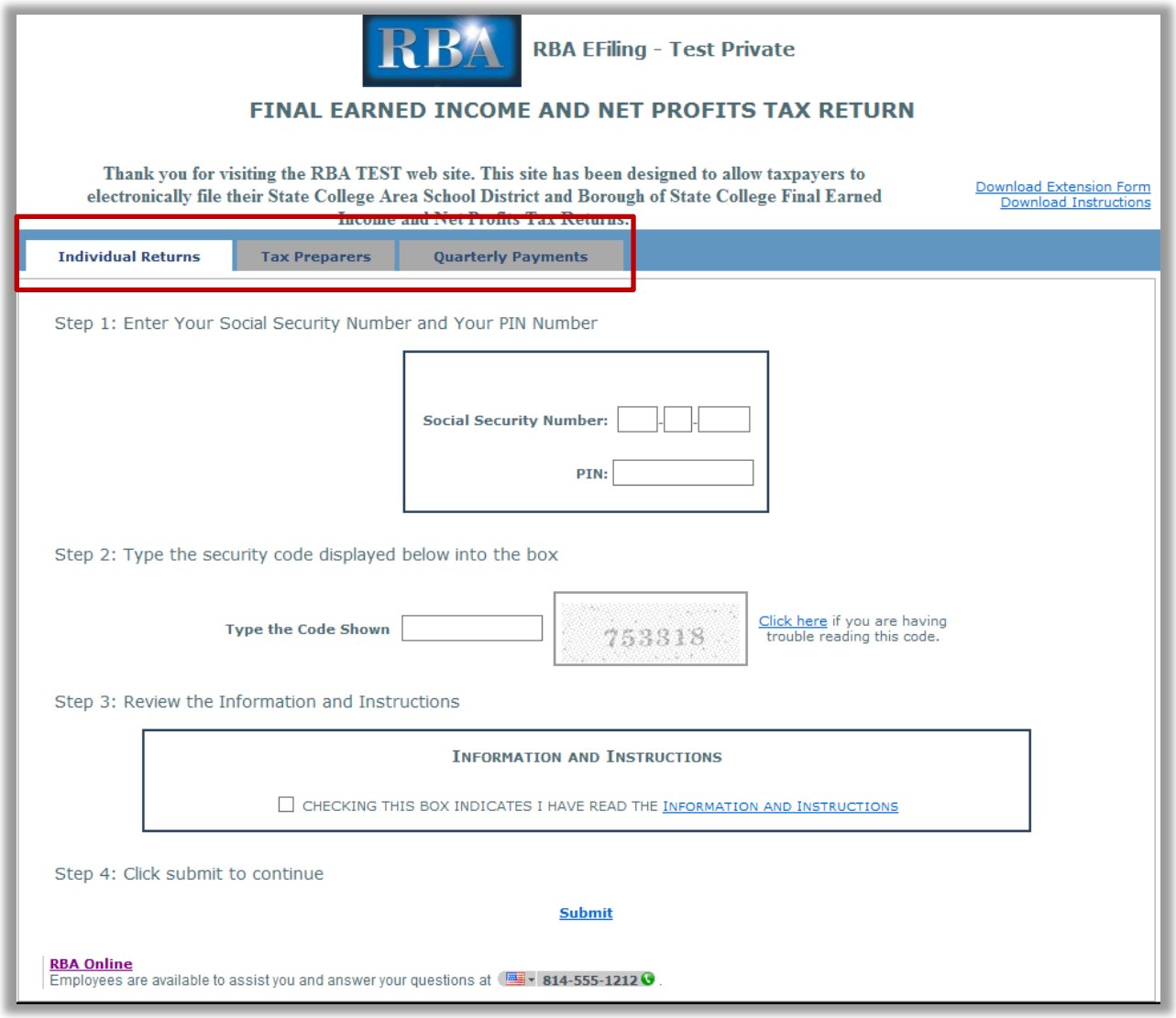
www.rba.com

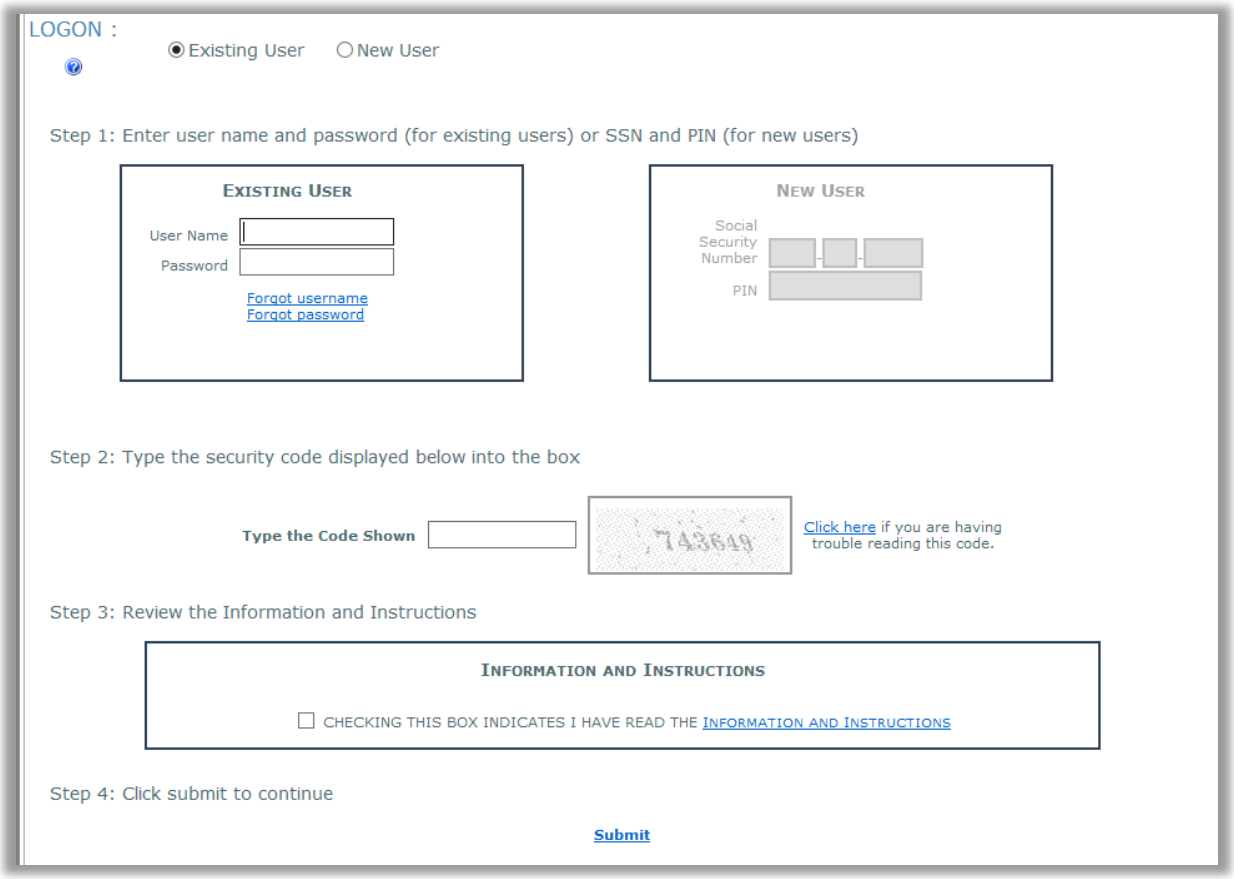
Quarterly Payments Login

A set of tabs have been added to the eFiling Taxpayer logon page, Individual Returns, Tax Preparers and Quarterly Payments. Taxpayers who wish to file their tax return need to proceed as normal, entering in their Social Security number, PIN number and Security Code to begin their tax return.

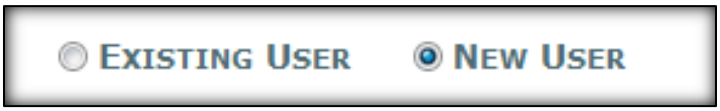
Click on the **Quarterly Payments** tab to continue.



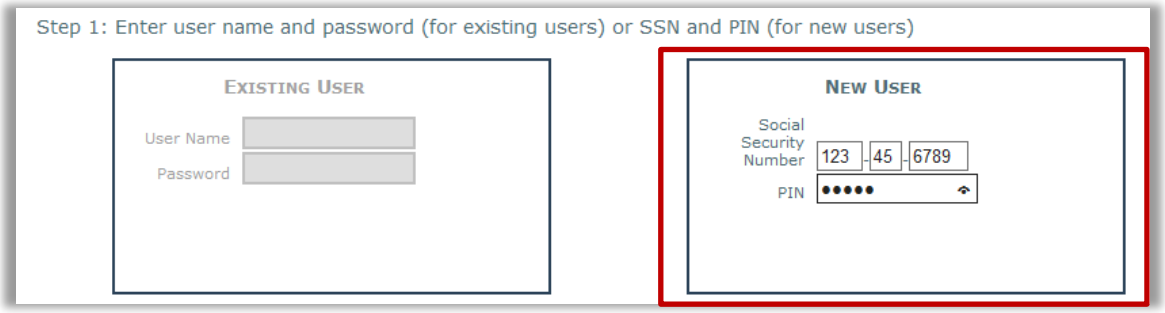
The Quarterly Payments logon screen is shown below.



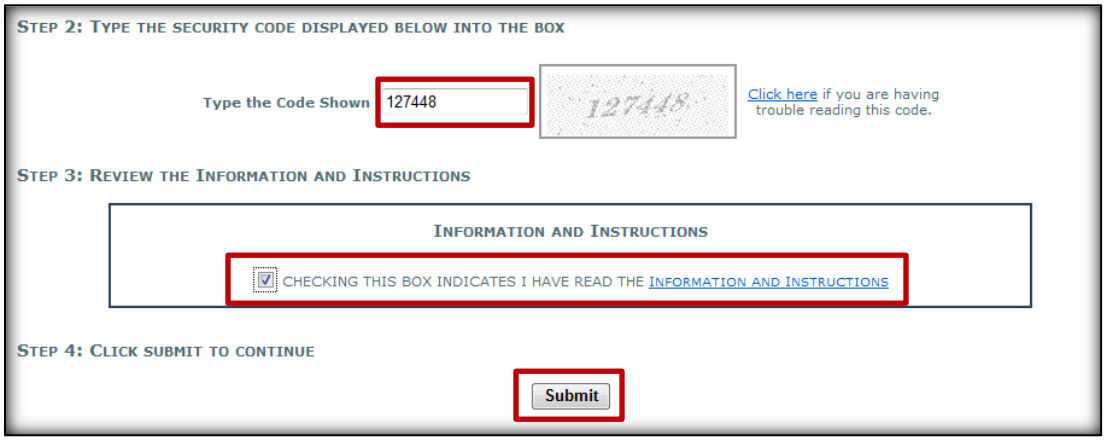
To begin, click on the **New User** radio button.



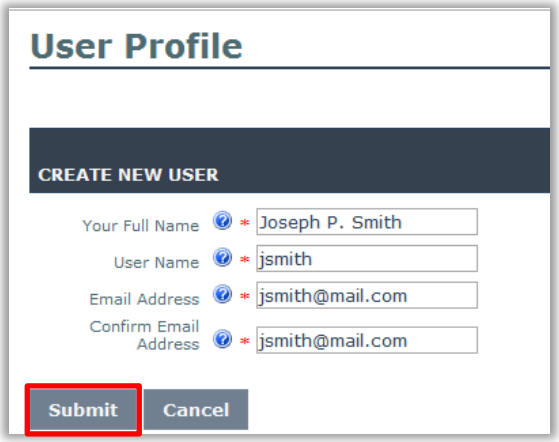
Enter your Social Security Number, and the PIN that has been given you by the Tax Office. This is the same PIN you would use to login to eFiling.



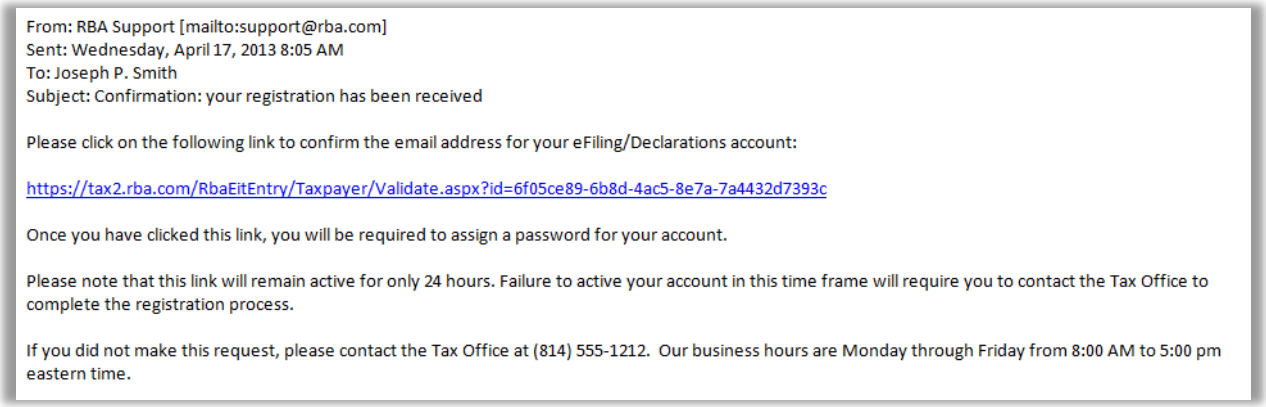
Type in the security code, read the Information and Instructions and click the checkbox, then click on **Submit**.



Next, enter the User Name and Email Address to be used with your user account. Click Submit after entering the required information.



An email will be sent to the email account you specified in setting up your account. An example is below. Click on the link or copy and paste it into an internet browser.



From: RBA Support [mailto:support@rba.com]
Sent: Wednesday, April 17, 2013 8:05 AM
To: Joseph P. Smith
Subject: Confirmation: your registration has been received

Please click on the following link to confirm the email address for your eFiling/Declarations account:

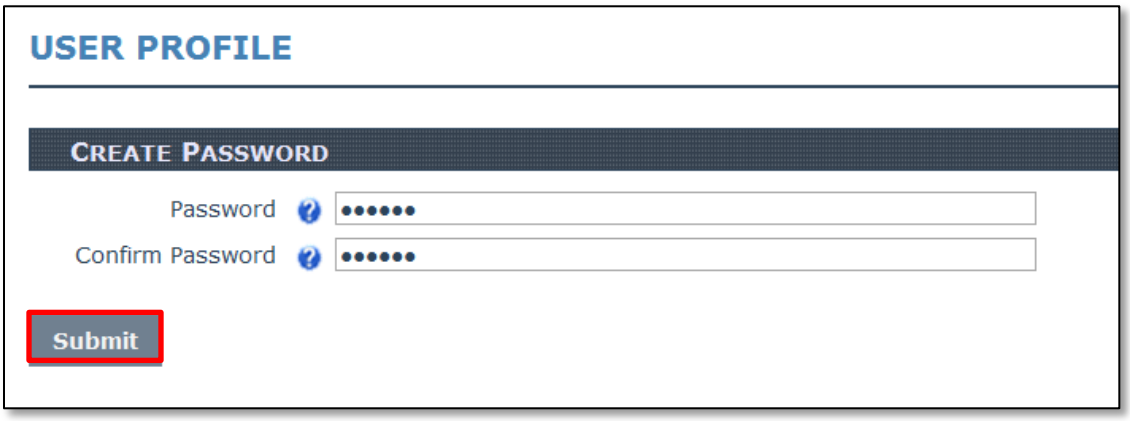
https://tax2.rba.com/RbaEitEntry/Taxpayer/Validate.aspx?id=6f05ce89-6b8d-4ac5-8e7a-7a4432d7393c

Once you have clicked this link, you will be required to assign a password for your account.

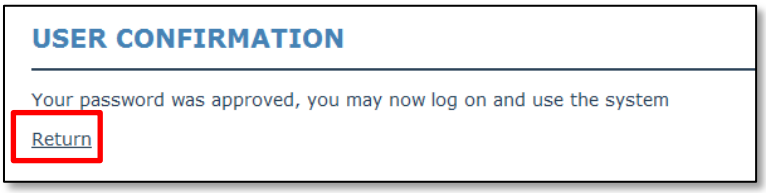
Please note that this link will remain active for only 24 hours. Failure to active your account in this time frame will require you to contact the Tax Office to complete the registration process.

If you did not make this request, please contact the Tax Office at (814) 555-1212. Our business hours are Monday through Friday from 8:00 AM to 5:00 pm eastern time.

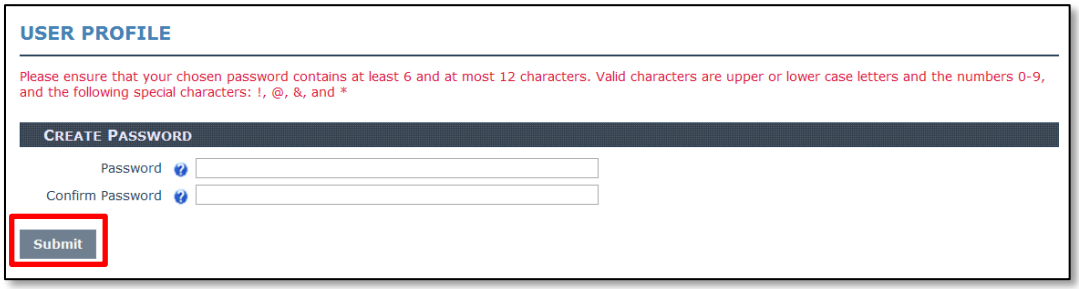
You will be directed to the Create Password screen. Enter your password two times, then click Submit.



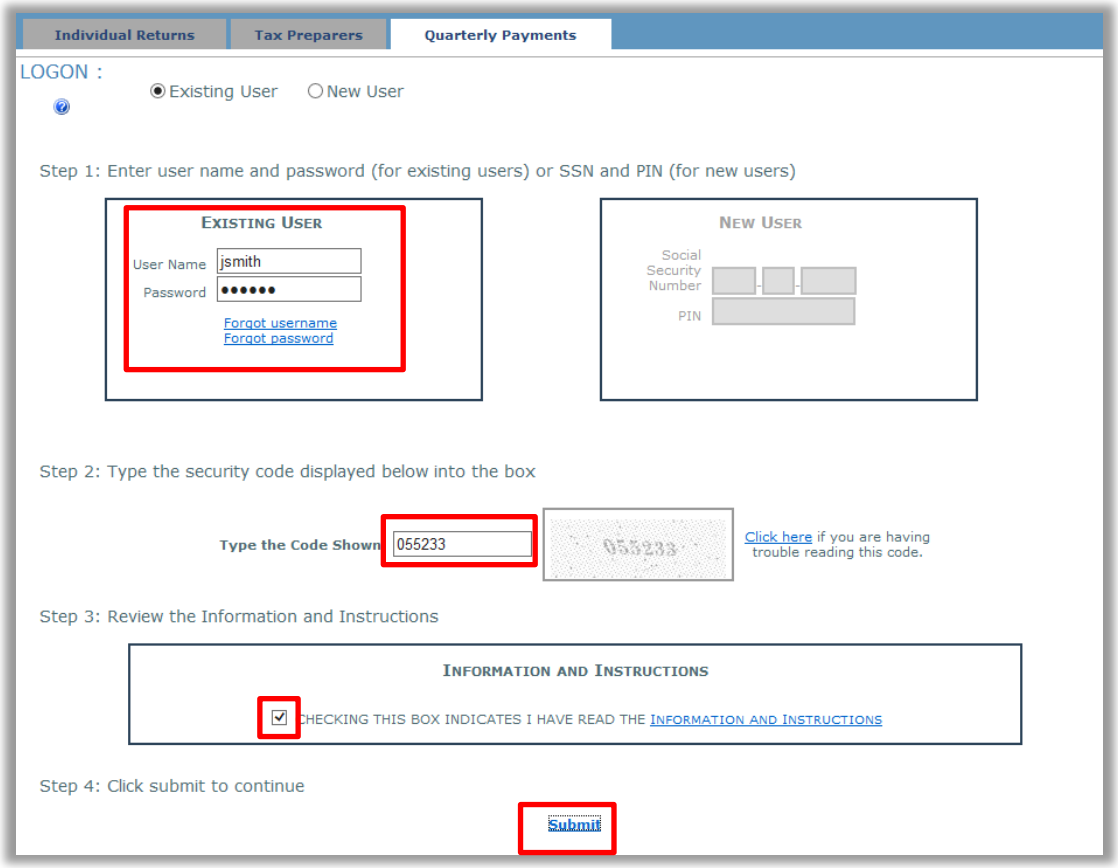
If your Password is accepted, you will get the following message. Click on the Return link to login.



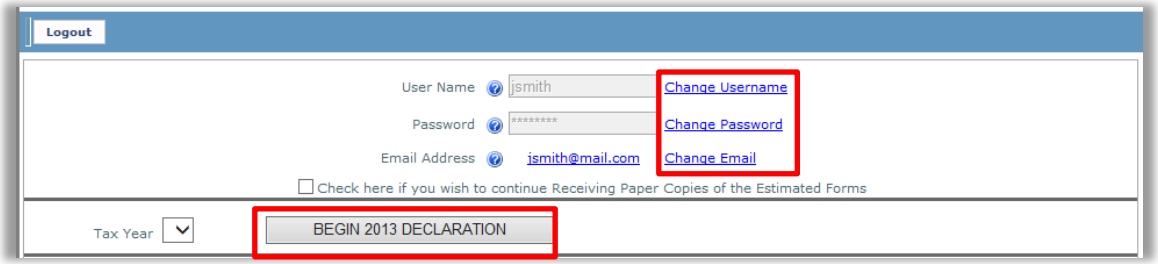
If your password is not accepted, you will get a message similar to the following. Re-enter your password two times following the instructions given then click Submit to continue.



Enter your username and password, then enter the security code and check the box acknowledging you have read the Information and Instructions. Click **Submit** to continue.



You will be taken to the initial screen of the Declarations module. From here, you can click on the links to change your username, password or email. To begin entering your Estimated Declarations, click on the **Begin 2013 Declaration** button.



The full Estimated Declarations screen is shown on the next page.

Save Cancel

LEGAL RESIDENCE (DOMICILE) See Instructions

Name * JOSEPH P. SMITH

Social Security No.* 123 - 45 - 6789

Address *

City *

State * PA Country * USA

Zip Code * -

Not sure of County, School District, or Municipality? Click Here

County * Select a County

School District * Select a School District

Municipality * Select a Municipality

Display Codes

EMPLOYER WORKSITE LOCATION

Name *

☐ Same as Residence

Address *

City *

State * PA Country *

Zip Code * -

Not sure of County, School District, or Municipality? Click Here

County * Select a County

School District * Select a School District

Municipality * Select a Municipality

Display Codes

ESTIMATED ANNUAL PAYMENT DUE (2013)

Instructions to determine payment

Wages/Earnings *

Earned Income Tax *

Local Service Tax *

Total Tax Due

SCHEDULE OF PAYMENTS

	☑ QUARTER 1 (2013)	☑ QUARTER 2 (2013)	☑ QUARTER 3 (2013)	☑ QUARTER 4 (2013)	☐ EXTENSION (2012)
Due Date	4/30/2013	7/31/2013	10/31/2013	1/31/2014	4/15/2013
Payment Date	* 5/7/2013	* 7/31/2013	* 10/31/2013	* 1/31/2014	
Submitted Date					
Earned Income Tax	*	*	*	*	
Local Service Tax	*	*	*	*	
Total Tax Due - Paid					

Save Cancel

PAYMENT OPTIONS

Check all that apply

- ☐ Quarter 1
- ☐ Quarter 2
- ☐ Quarter 3
- ☐ Quarter 4
- ☐ Extension

AMOUNT TO BE PAID

PAYMENT METHOD

Pay By Check

◉ Pay By Check

Pay Now

○ Pay Online with Credit Card (extra fee applies) ○ Pay Online by eCheck (extra fee applies)

Last Name

First Name

M.I. Suffix

Phone Number ( ) -

Email Address

Address 1

Address 2

City

State PA Country USA

Zip Code -

○ Pay by ACH Debit – Will be based on Payment Dates Specified (no extra fee)

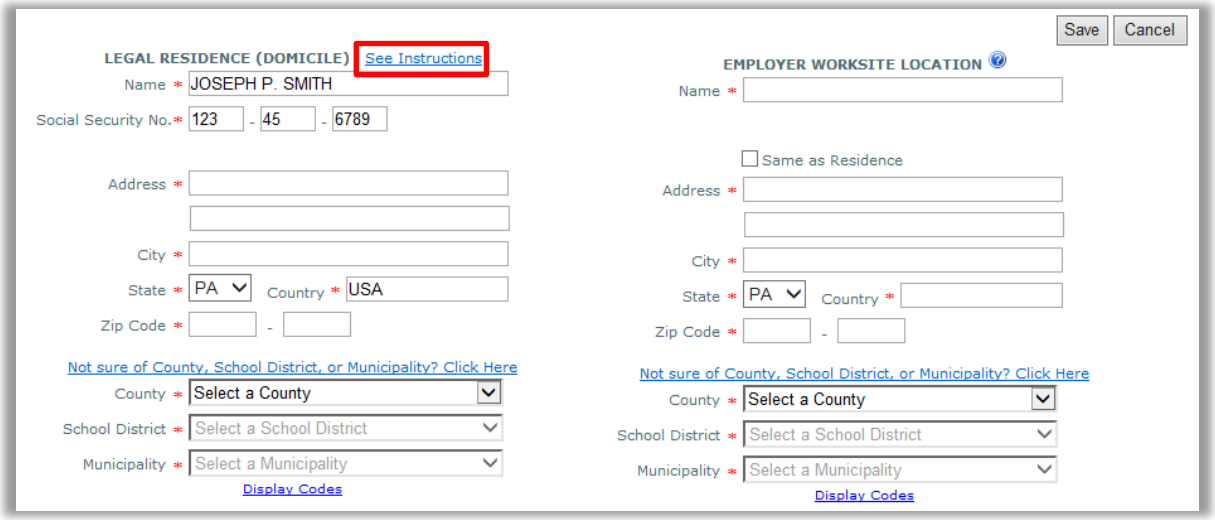
Bank Account Type Checking

Bank Name

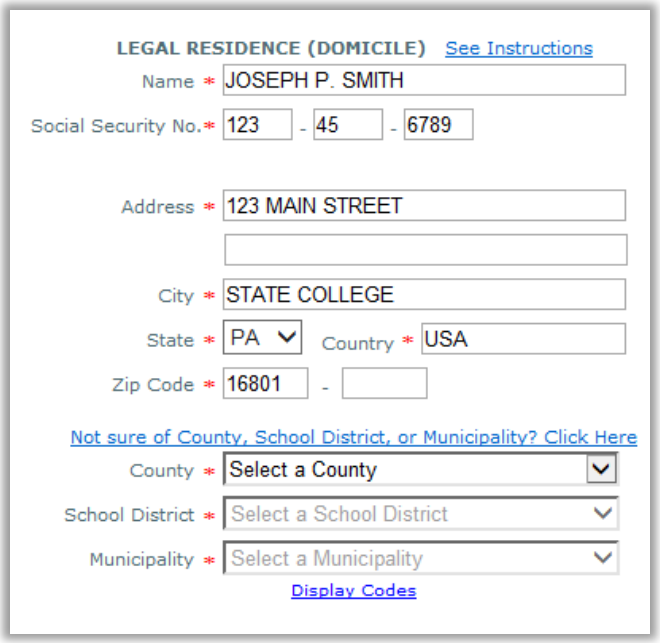
Routing Number

Account Number

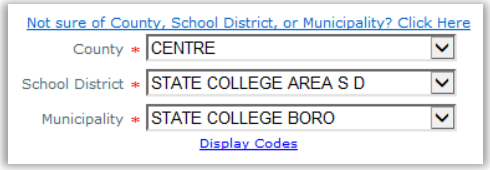
The top section of the screen is where you will enter your home, or Domicile, address and your Worksite address. Click on the See Instructions link for more information on how to determine where your Domicile is.



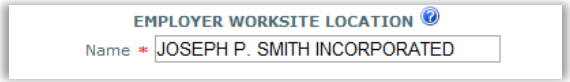
First enter your Domicile address. Enter the street address, not a PO Box address. You can use the second address line for a PO Box if you wish.



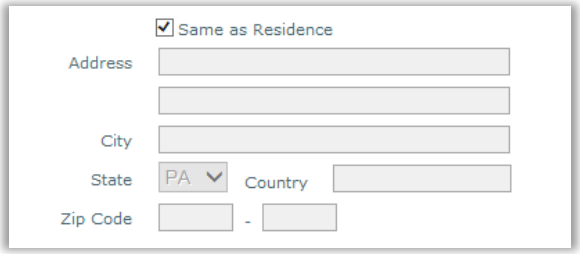
It is important that you choose the correct County, School District and Municipality where this WorkSite is located. You can click on the link above these fields to verify you have the correct information for the address of the WorkSite. Click on Display Codes after selecting the County, School District and Municipality to display the DCED and State Codes for this jurisdiction.



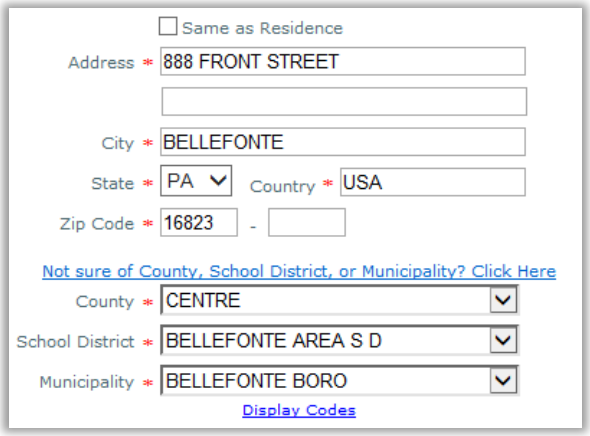
Enter the name of the employer from where the income is being earned. If you earn income from multiple sources, use the one with the highest income level.



There are two ways to enter the address. If it is the same as your Domicile address, click the **Same as Residence** checkbox.

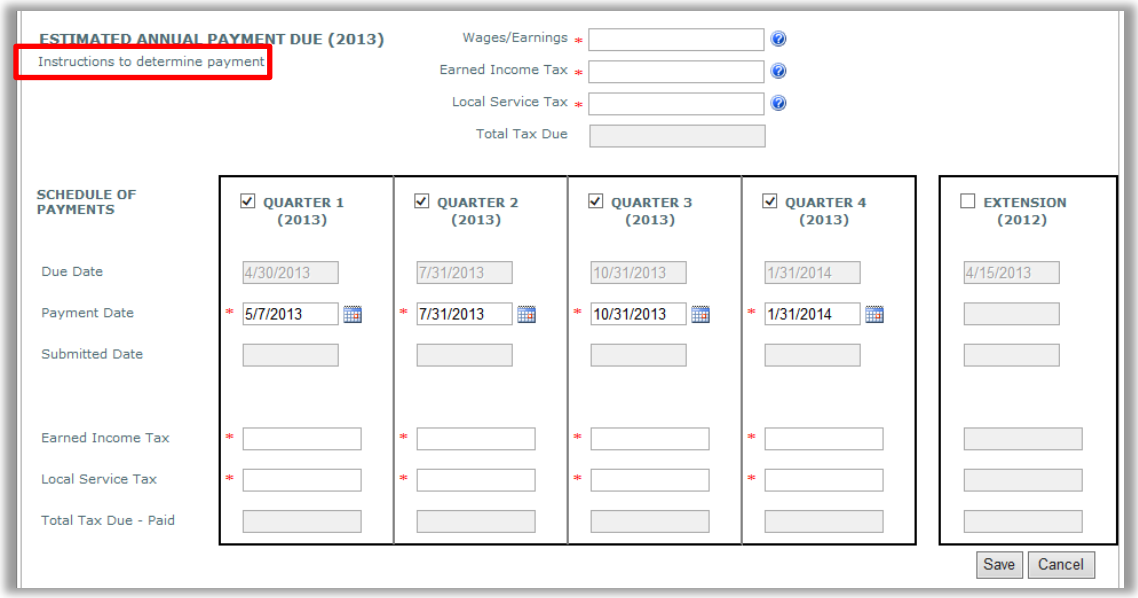


Otherwise fill in the Worksite address information as you did with the Domicile address.

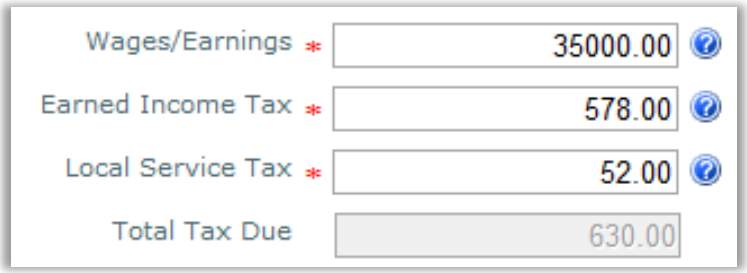


Please note that you can change you addresses at any time. Any change will be submitted to the tax office the next time you Make a New Payment.

The next section is where you enter your estimated earnings, estimated Earned Income Tax due and Local Service Tax due for the tax year, and calculate the quarterly payments. This is also where you can submit an extension to your prior year local Earned Income Taxes. For more information on how to determine the amounts, click on the Instructions to determine payment link.



Enter the estimated Wages/Earnings, Earned Income Tax, and Local Service Tax for the full tax year.



Once you have entered the amounts, the four quarters will be automatically populated.

SCHEDULE OF PAYMENTS	QUARTER 1 (2013)	QUARTER 2 (2013)	QUARTER 3 (2013)	QUARTER 4 (2013)
Due Date	4/30/2013	7/31/2013	10/31/2013	1/31/2014
Payment Date	* 5/7/2013	* 7/31/2013	* 10/31/2013	* 1/31/2014
Submitted Date				
Earned Income Tax	* 144.50	* 144.50	* 144.50	* 144.50
Local Service Tax	* 13.00	* 13.00	* 13.00	* 13.00
Total Tax Due - Paid	157.50	157.50	157.50	157.50

The due dates are populated with the date each quarterly payment is due to the tax office.

Due Date	4/30/2013	7/31/2013	10/31/2013	1/31/2014

The payment dates are populated with the due dates, unless the current date is past the due date. In this case, the Payment Date is populated with today's date. You can change these dates, but you cannot change them to a date past the Due Date.

Payment Date	* 5/7/2013	* 7/31/2013	* 10/31/2013	* 1/31/2014

The EIT and LST amounts your populated above are evenly split into four payments. You can change the payment amounts, but they must total the amounts you entered above.

Earned Income Tax	* 144.50	* 144.50	* 144.50	* 144.50
Local Service Tax	* 13.00	* 13.00	* 13.00	* 13.00
Total Tax Due - Paid	157.50	157.50	157.50	157.50

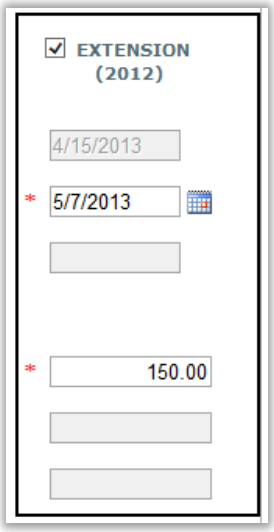
It might be the case that you will not be making one of the quarterly payments. For example, you are just moving into the area or just started a business. In this case, uncheck the box at the top of the Quarter you are not going to pay.

SCHEDULE OF PAYMENTS	☑ QUARTER 1 (2013)	☑ QUARTER 2 (2013)	☑ QUARTER 3 (2013)	☑ QUARTER 4 (2013)
Due Date	4/30/2013	7/31/2013	10/31/2013	1/31/2014
Payment Date	* 5/7/2013	* 7/31/2013	* 10/31/2013	* 1/31/2014
Submitted Date				
Earned Income Tax	* 144.50	* 144.50	* 144.50	* 144.50
Local Service Tax	* 13.00	* 13.00	* 13.00	* 13.00
Total Tax Due - Paid	157.50	157.50	157.50	157.50

With the box unchecked, you will not be able to enter information in for that quarter. The total amounts will be redistributed between the remaining quarters.

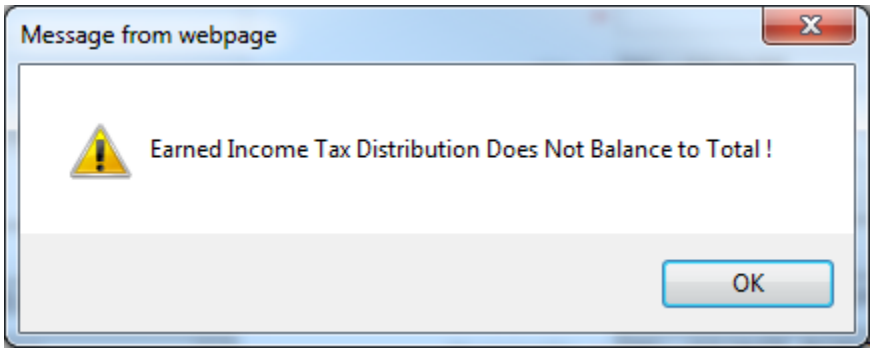
SCHEDULE OF PAYMENTS	☐ QUARTER 1 (2013)	☑ QUARTER 2 (2013)	☑ QUARTER 3 (2013)	☑ QUARTER 4 (2013)
Due Date	4/30/2013	7/31/2013	10/31/2013	1/31/2014
Payment Date		* 7/31/2013	* 10/31/2013	* 1/31/2014
Submitted Date				
Earned Income Tax		* 192.67	* 192.67	* 192.66
Local Service Tax		* 17.33	* 17.33	* 17.34
Total Tax Due - Paid		210.00	210.00	210.00

Check the box on the Extension section to file an extension. Enter the date the payment will be made, and the amount you are paying in taxes. If you are only submitting an extension and will not be submitting estimated quarterly declarations, make sure you uncheck the box on all four quarters.

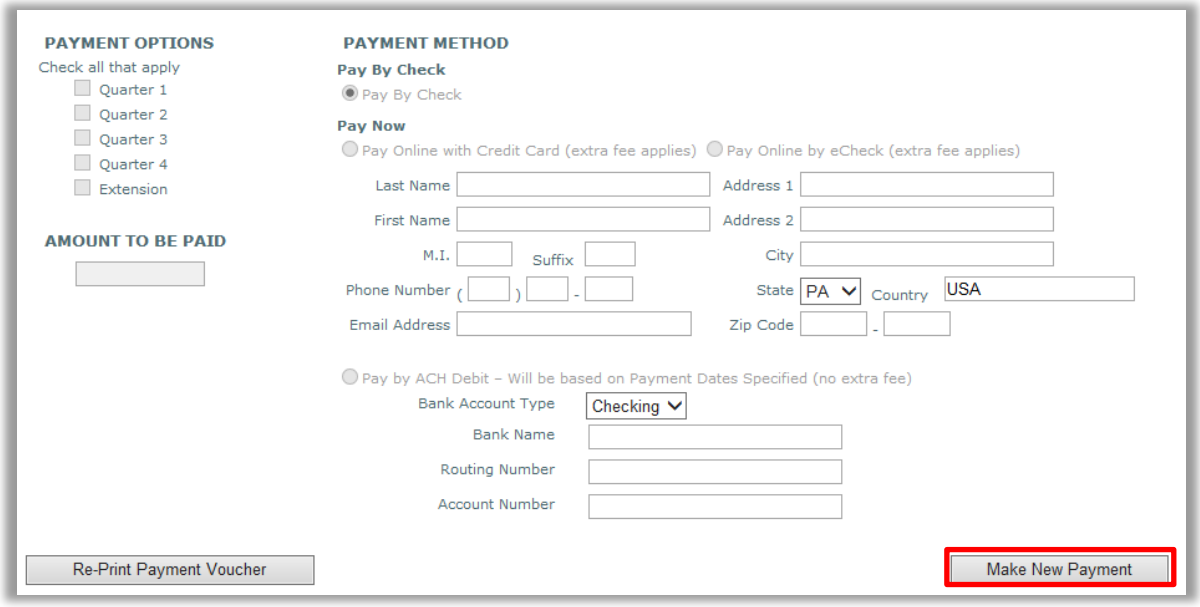


Once you have all information entered, click **Save**.

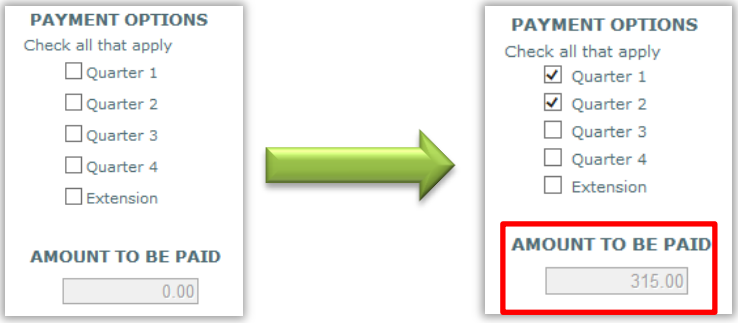
Warning messages will be displayed if information is missing, or if the quarterly distributions do not balance to the totals entered.



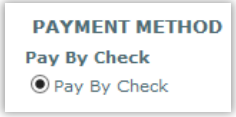
Once you have the information entered, you can transmit the information to the tax office, and make your quarterly payments, either one quarter at a time or all at once. Scheduling your quarterly payments by ACH all at once sets up your estimated declarations for a full year with one submission. Begin by clicking the **Make New Payment** button.



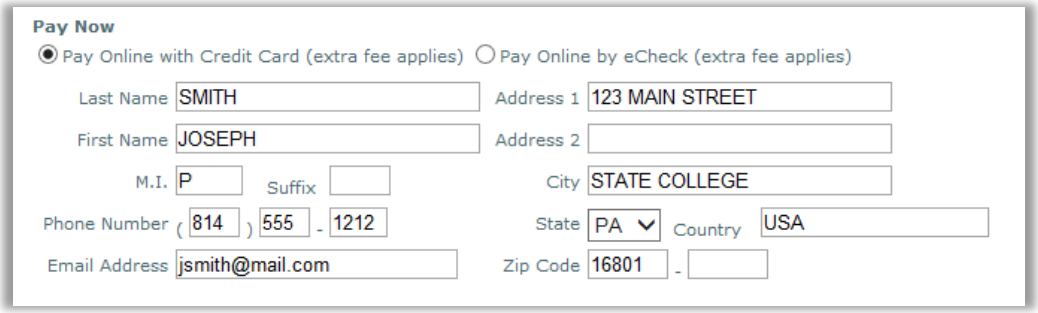
The first step is to select the Quarters (or Extension) that you want included with this Payment submission. As you check the quarters you want included the Amount to be Paid will be calculated based on the Total Tax Due on the section where you entered the tax amounts.



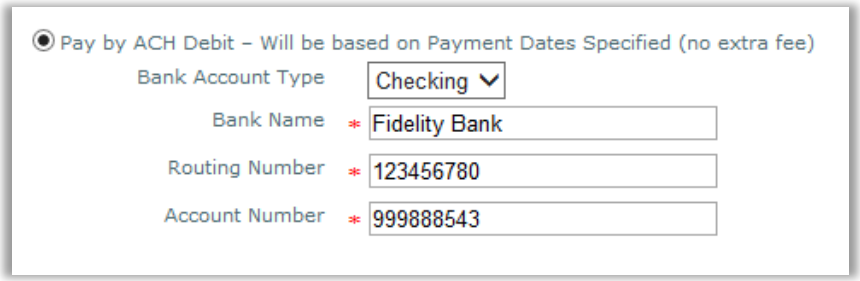
The second step is to select the payment method. There are up to three choices, with the first being paying by mailing a check to the tax office.



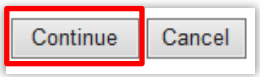
The next option is to pay using a credit card or online check (if available). If you use this method a service charge will be added to your payment amount by the third party online provider.



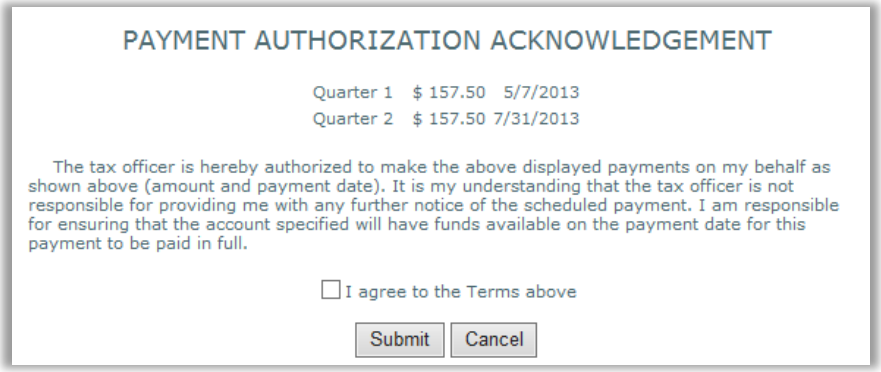
The last option is to pay by ACH Debit. You will be to provide bank account information, and the payment amounts will be charged to your account on the payment dates you specified.



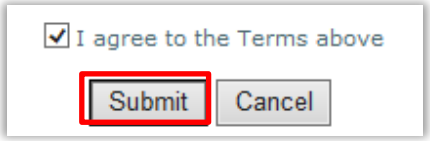
When you have entered the information for the payment method you selected, click **Continue**.



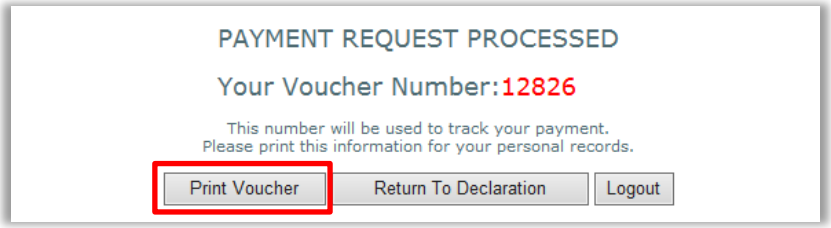
You will be asked to read a statement and check a box signing your agreement to the terms stated.



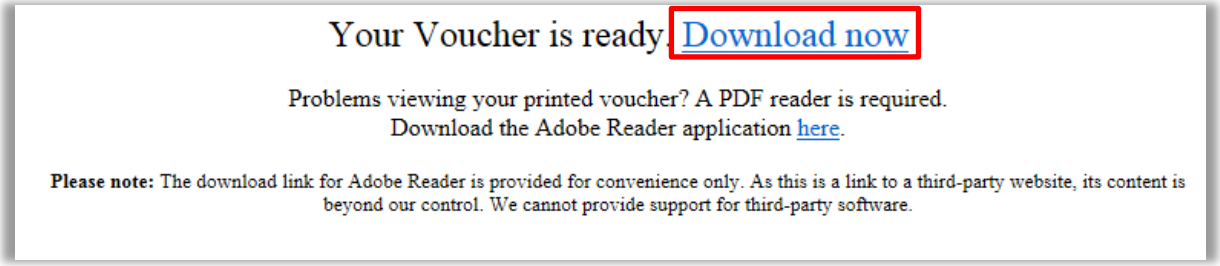
Check the box, then click **Submit**.



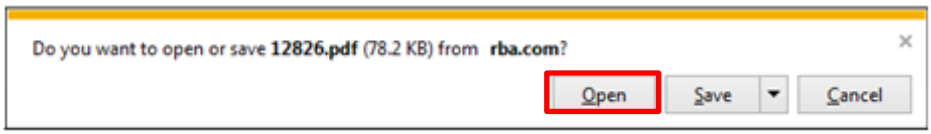
You will be given a Voucher Number. Click Print Voucher to print a copy of the voucher for your records.



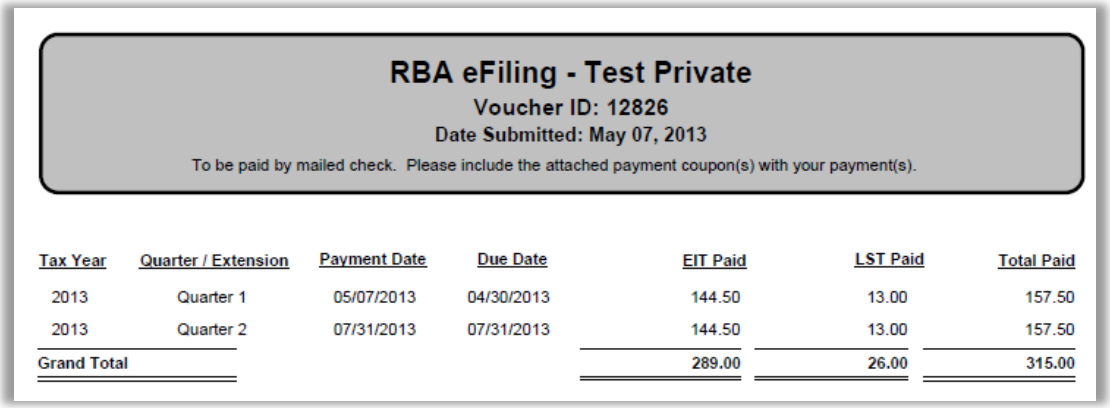
Make sure you are allowing popups as the print voucher opens a popup screen. On this screen, click the Download now link to download the pdf file.



Depending on which browser you are using, a message will be displayed giving you the option to save or open the file. This is the screen shown by Internet Explorer 10. Click Open to view the voucher.



The first section of the voucher lists the details for each quarter/extension included in the voucher.



RBA eFiling - Test Private
Voucher ID: 12826
Date Submitted: May 07, 2013
To be paid by mailed check. Please include the attached payment coupon(s) with your payment(s).

Tax Year	Quarter / Extension	Payment Date	Due Date	EIT Paid	LST Paid	Total Paid
2013	Quarter 1	05/07/2013	04/30/2013	144.50	13.00	157.50
2013	Quarter 2	07/31/2013	07/31/2013	144.50	13.00	157.50
Grand Total				289.00	26.00	315.00

The bottom of each page has a disclaimer, stating that your submission is subject to a review by the tax office.

The second page will print an individual Voucher for each Quarter and the Extension, if applicable. If you are mailing your payment, send the applicable coupons with your payment. In the example below, you would mail the first coupon immediately with your first quarter payment, and mail the second coupon with your second payment on or before the payment date of July 31.

Estimate Declaration Payment Voucher for 1st Quarter, 2013

Taxpayer: JOSEPH P. SMITH	123-45-6789
Taxpayer Address: 123 MAIN STREET STATE COLLEGE, PA 16801 USA	**Remit To Address:** THE TAX OFFICE SOMEWHERE STREET STATE COLLEGE, PA 16801-4864

Date Submitted:	05/07/2013	**EIT Due:**	$144.50	**Payment Date:**	05/07/2013
Voucher Id:	12826	**LST Due:**	$13.00	**Amount Due:**	$157.50

Please include this voucher with your payment.

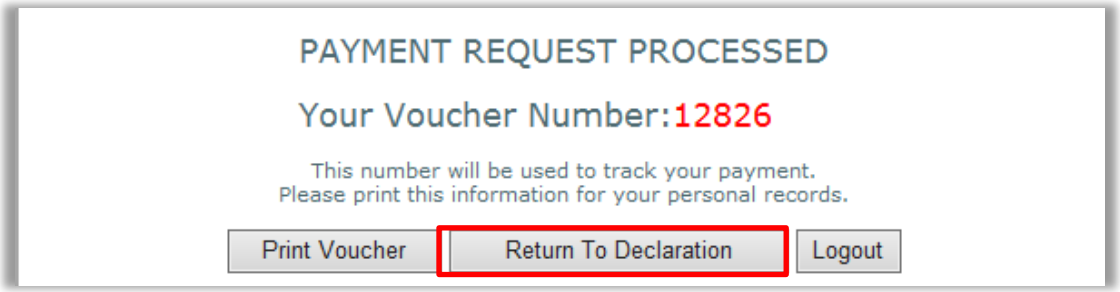
Estimate Declaration Payment Voucher for 2nd Quarter, 2013

Taxpayer: JOSEPH P. SMITH	123-45-6789
Taxpayer Address: 123 MAIN STREET STATE COLLEGE, PA 16801 USA	**Remit To Address:** THE TAX OFFICE SOMEWHERE STREET STATE COLLEGE, PA 16801-4864

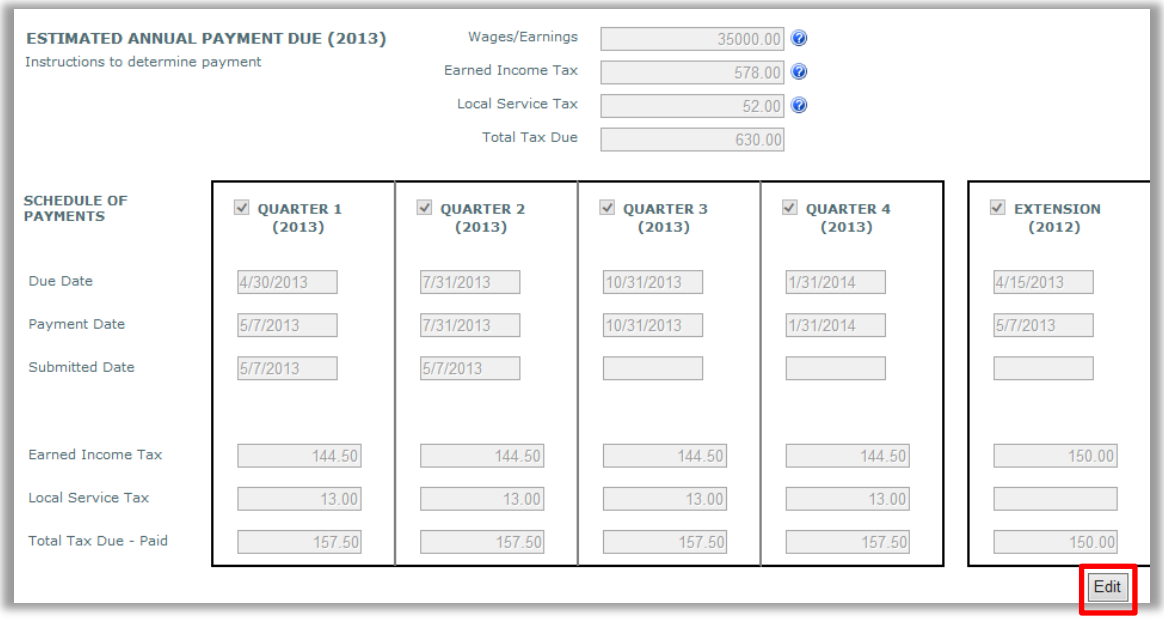
Date Submitted:	05/07/2013	**EIT Due:**	$144.50	**Payment Date:**	07/31/2013
Voucher Id:	12826	**LST Due:**	$13.00	**Amount Due:**	$157.50

Please include this voucher with your payment.

Click Return To Declaration to view how this payment is displayed on the screen.



Note that the Submitted Dates are now filled in for the payments you made. Click the **Edit** button to make changes to the unpaid quarters.



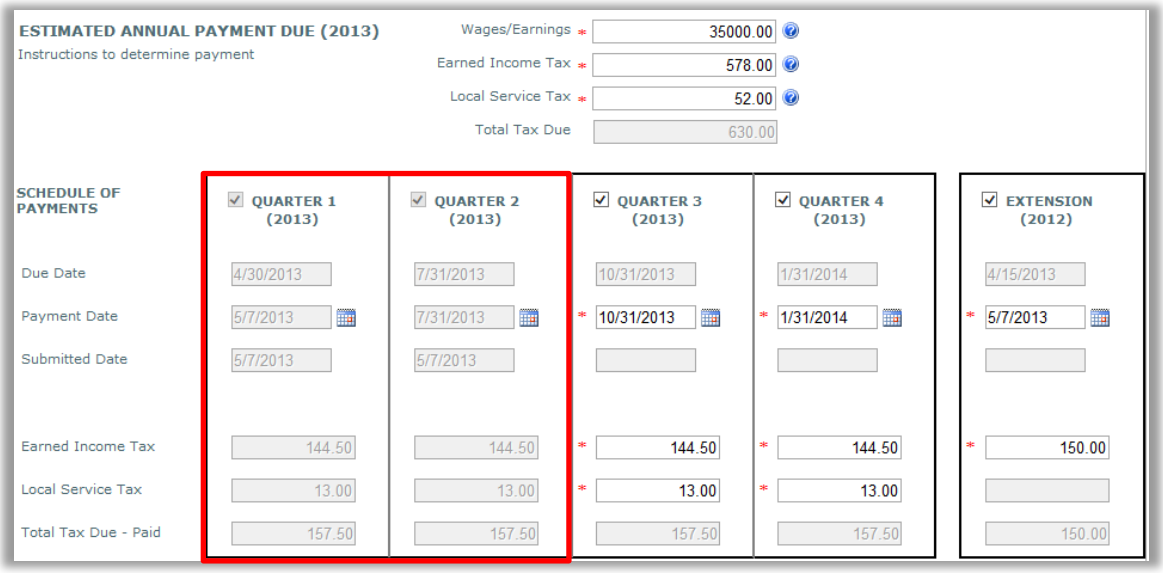
ESTIMATED ANNUAL PAYMENT DUE (2013)
Instructions to determine payment

Wages/Earnings	35000.00
Earned Income Tax	578.00
Local Service Tax	52.00
Total Tax Due	630.00

SCHEDULE OF PAYMENTS	QUARTER 1 (2013)	QUARTER 2 (2013)	QUARTER 3 (2013)	QUARTER 4 (2013)	EXTENSION (2012)
Due Date	4/30/2013	7/31/2013	10/31/2013	1/31/2014	4/15/2013
Payment Date	5/7/2013	7/31/2013	10/31/2013	1/31/2014	5/7/2013
Submitted Date	5/7/2013	5/7/2013			
Earned Income Tax	144.50	144.50	144.50	144.50	150.00
Local Service Tax	13.00	13.00	13.00	13.00	
Total Tax Due - Paid	157.50	157.50	157.50	157.50	150.00

Edit

Note that the first two quarters are read only and cannot be changed. Only the Quarters and the Extension which has not been paid can be changed.

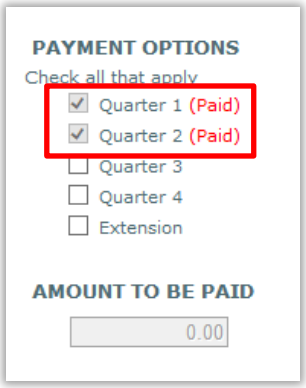


ESTIMATED ANNUAL PAYMENT DUE (2013)
Instructions to determine payment

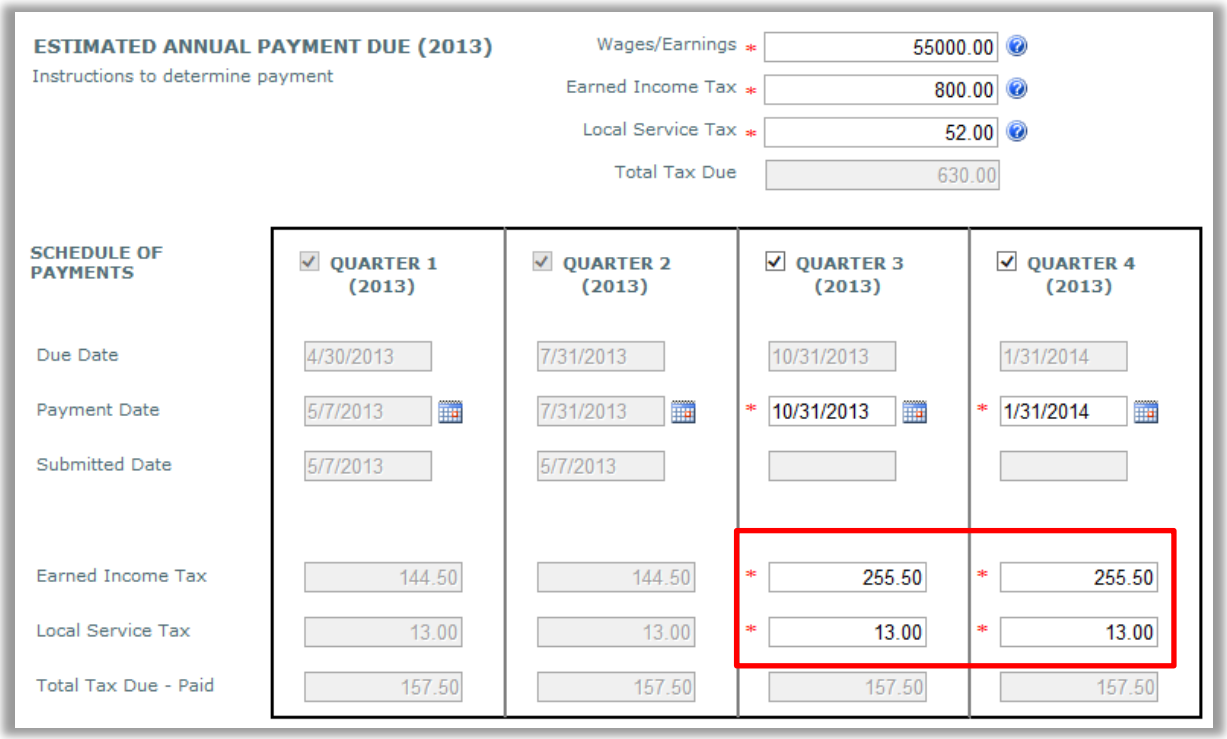
Wages/Earnings *	35000.00
Earned Income Tax *	578.00
Local Service Tax *	52.00
Total Tax Due	630.00

SCHEDULE OF PAYMENTS	QUARTER 1 (2013)	QUARTER 2 (2013)	QUARTER 3 (2013)	QUARTER 4 (2013)	EXTENSION (2012)
Due Date	4/30/2013	7/31/2013	10/31/2013	1/31/2014	4/15/2013
Payment Date	5/7/2013	7/31/2013	* 10/31/2013	* 1/31/2014	* 5/7/2013
Submitted Date	5/7/2013	5/7/2013			
Earned Income Tax	144.50	144.50	* 144.50	* 144.50	* 150.00
Local Service Tax	13.00	13.00	* 13.00	* 13.00	
Total Tax Due - Paid	157.50	157.50	157.50	157.50	150.00

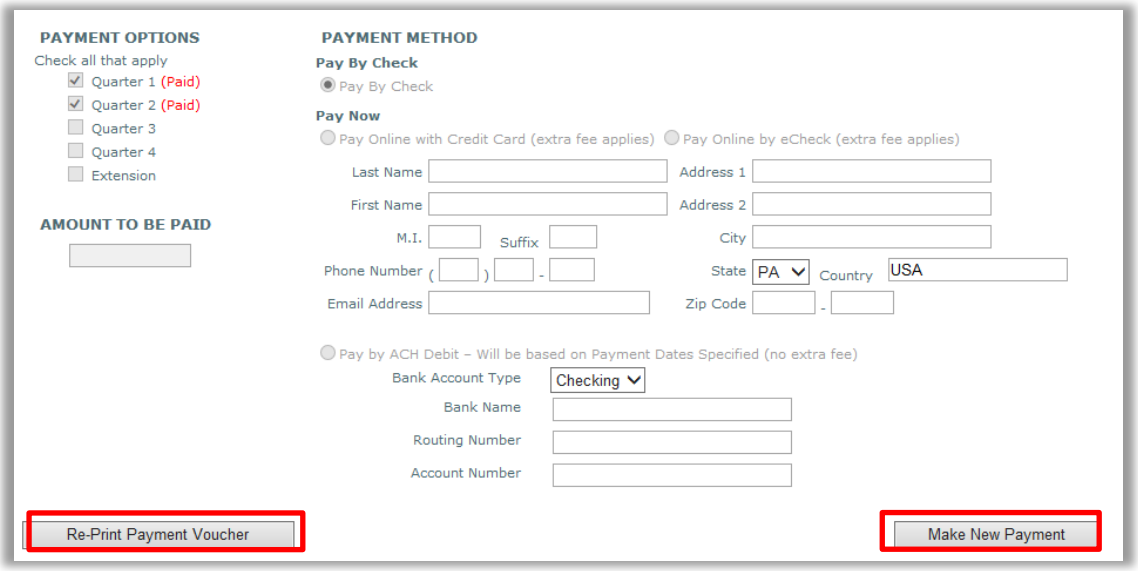
Also note that the first two quarters are flagged as Paid on the payment section of the screen.



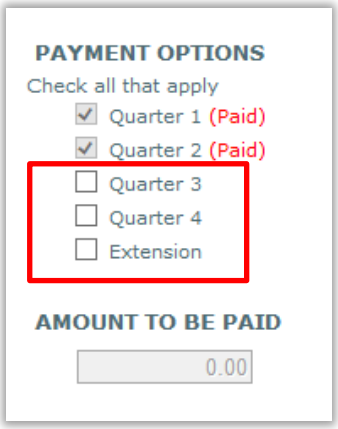
You can change the Total amount of Wages and/or Taxes at any time as long as one quarter is left unpaid. The taxes will be automatically redistributed over the unpaid quarters to equal the total EIT and LST taxes indicated.



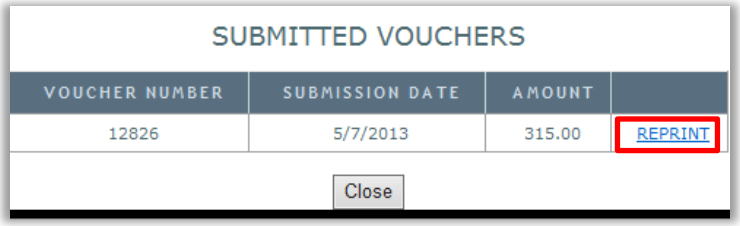
If you click **Make New Payment**



You can only select to pay Quarters or the Extension that have not been previously paid.

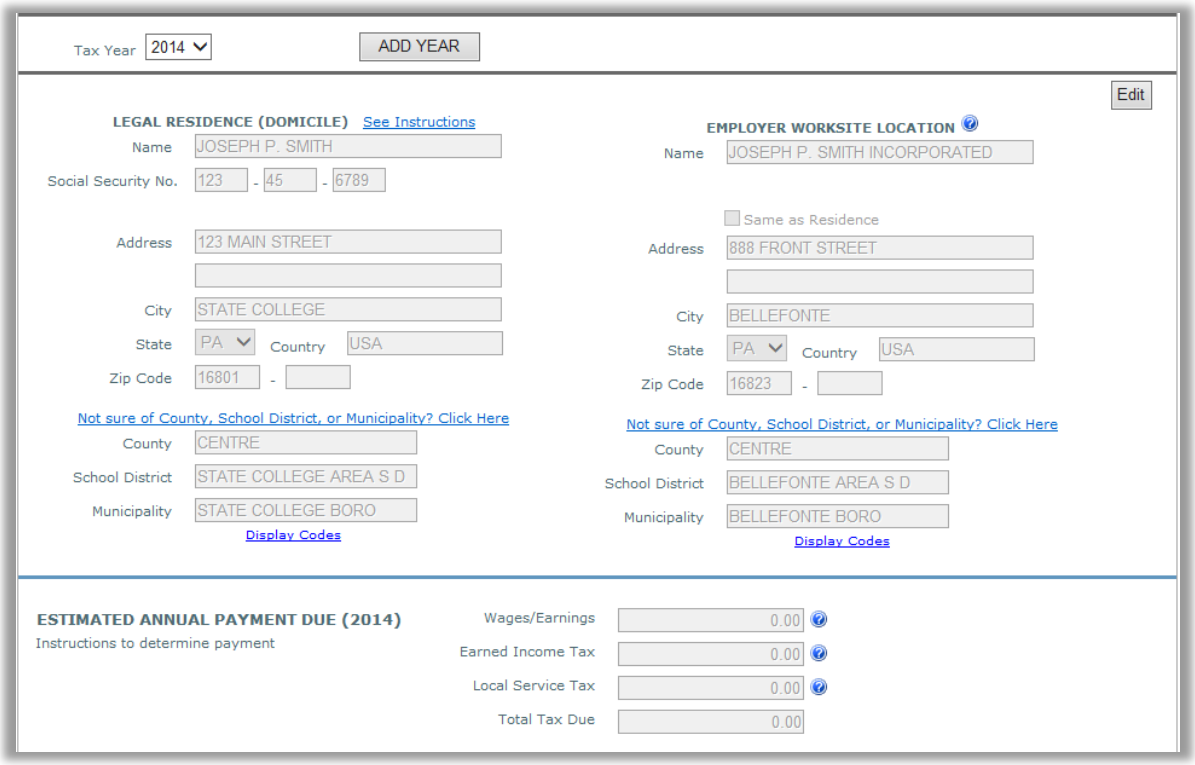


Clicking the Re-Print Payment Voucher button brings up this screen. Click the REPRINT link to reprint a voucher.

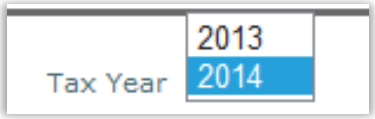


Click the Add Year button to add a new Estimated Declaration.

You should verify the addresses are correct on your new year Estimated Declaration before continuing. Enter the amounts and make your payments as described in this document.



At the top of the screen there is now a Tax Year drop down screen where you can select to view all previously created Estimated Declarations.



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Software Documentation

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