

Using the City of Xenia's Municipal Tax Preparation Tool

The Municipal Tax Preparation Tool is designed to assist individual taxpayers in completing their Xenia Income Tax return. The product is a preparation only product and at the completion of the preparation of your tax return, you must print the return, attach all the required supporting documentation (i.e., W-2s, 1099s, Schedule Cs, Schedule E's, etc.), sign the return and mail it to the City of Xenia Tax Division. **The product does not allow for filing or payment of your return.**

To use the tax tool, you must be an established taxpayer with the City of Xenia and this product may only be used by taxpayers filing under a Social Security Number; businesses who file under a Federal ID number cannot use the tax tool. If you did not receive a tax return in the mail for 2009 filing but have established an account with the Xenia Tax Division, you can lookup your account number by entering the first three letters of your last name and the last four digits of your Social Security Number. If your filing status has changed from previous years (i.e., you filed married last year, but now wish to file single or vice versa), you will not be able to change your filing status using the tax tool and therefore, you will not be able to use the tax tool to prepare your return.

If you received a preprinted tax return in the mail from the City of Xenia, the return will contain personalized secure web site and the account number that is required active your electronic account.

If you use the personalized secure web site, you will have an opportunity to answer some survey questions concerning how you would like to use technology when communicating with the Income Tax Division. You will also receive a personalized welcome page with basic information about using the Tax Tool and income tax return filing requirements.

The first screen that appears when you access the Tax Tool is similar to the following:

Individual Taxpayer Login

1) REGISTERED USER - Login here to calculate tax returns. **All users must activate their account annually. If this is your first time using the tool in . please go to Step 2 below to activate your account.**

Enter your account number.

Account Number:

2) ACTIVATE YOUR ACCOUNT - **All users must activate their account annually.** If this is your first visit to the site for you must first [activate your electronic filing account](#) in order to log in. Click on the "activate your electronic filing account" link.

3) View estimated payments on individual accounts for tax year - [Click here](#)

4) Forget PIN - If you forgot your PIN click [here](#) to have your information displayed. You will be required to enter your last name, account number and the e-mail address you used when you created your account. When accepted by the City of Xenia, your PIN will be displayed to you.

5) Forget your password? - [click here](#) to have your information displayed. You will be required to enter your account number, last name, and PIN that you used when registering your account. When accepted by the City of Xenia, your password will be displayed to you.

6) Forget your Account Number? If you forgot your Account Number click [here](#) to have your information displayed. You will be required to enter your the first three letters of your last name, and the last four digits of you SSN. When accepted by the City of Xenia, your account number will be displayed to you.

[FIRST TIME USING THE TAX TOOL FOR 2009?](#)

If this is your first time accessing the Tax Tool for preparation of your 2009 return, you must click on **[activate your electronic filing account](#)** and a screen similar to the following will be displayed:

Create a User Account

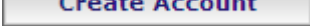
Please enter your account number you received and the last 4 digits of your Social Security Number in the boxes below. Please note that this system does not contain or store your full Social Security Number. You will then reset your password and create your PIN to finalize your account.

Account No.:

Last 4 of SSN :

Questions? - Call (937) 376-7248 or [e-mail](#) the Tax Office. (Do not transmit confidential information, e.g. social security numbers, via e-mail.)

Enter the account number as it appears on your pre-printed Xenia return or use the **Forget Your Account Number?** on the previous screen to obtain your account number.

After entering your **Account No** and **Last 4 of SSN**, click  and a screen similar to the following will be displayed:

Taxpayer Account Setup


Welcome to the Xenia Income Tax Preparation Tool. Please complete your account setup below. Please type in new password, PIN, and your e-mail address below. Passwords must be between 8 and 32 alpha-numeric characters, including at least one number.

Acct. No.: tgtest207

PIN:

E-Mail Address:


Re-Enter E-Mail Address:


Select a Security Question: 


Security Question Answer:

New Password:

Confirm New Password:

Select a Security Image: 



Complete the screen to assign a pin, password, security question and image to your account. After clicking , you will be taken to Step 1 in the Tax Preparation Tool.

NOTE: You may receive a message asking you to add tax@ci.xenia.oh.us to your Safe List to prevent emails from the Tax Division being classified as Spam or Junk.

RETURNING USERS (ALREADY ACTIVATED ACCOUNT FOR 2009)

Individual Taxpayer Login


1) REGISTERED USER - Login here to calculate your tax returns. **All users must activate their account annually. If this is your first time using the tool in 2009, please go to Step 2 below to activate your account.**

Enter your account number.

Account Number:

Enter your account number and you will be presented with a screen similar to the following:

Login Confirmation



If this is not the security image you selected when you created your account, **do not login to the site.**

Please enter your password and PIN in the boxes below to Login.

Password :

PIN :

Enter your password and pin and click to access the Tax Tool. ***If you forget your password or pin, use the **Forget Pin** or **Forget Password?** on the previous screen to obtain this information.***

BASIC INSTRUCTIONS

Please carefully read the information on the **Step 1 – Welcome** page for important information about using the tax tool.

After reading this information, you are ready to start preparing your return.

PREPARING YOUR RETURN

Xenia Residents with no city taxable income

If you have no city taxable income for tax year 2009, please check the appropriate box in the lower portion of **Step 1** and click .

This will take you to **Step 2 – Personal Info**. Verify the information on this screen and make changes as necessary. NOTE: You will not be able to change your filing status or spouse information using the tax tool. Contact the Xenia Tax Office if there are changes to this information. After scrolling down to verify all the information, you must read the **Terms and Conditions** and then select the checkbox next to the line:

I have read and understand and agree to the terms and conditions of using this utility.

This checkbox must be checked to confirm that you have read the **Terms and Conditions** and agree to them before you can continue using the tax tool. After selecting the checkbox, click



Since you did not have any city taxable income for 2009, you are now taken to the last step – **Step 12 – Save and Print**. From this screen, you may print and save your return. **Adobe Acrobat Reader must be loaded to print and save your return.** There is a link on this page to load the Adobe Reader.

REMEMBER THAT YOUR RETURN HAS NOT YET BEEN FILED WITH THE CITY OF XENIA – YOU MUST STILL MAIL THE RETURN TO:

City of Xenia
Income Tax Division
PO Box 490
Xenia, OH 45385-0490

On **Step 12**, you have the option to:

[Create Printable Copy of Completed Forms](#)

Use this option to view, save or print your Xenia tax return.

[Create and Print Pre-Filled 2010 Estimated Payment Vouchers](#)

Not applicable for those with no city taxable income

[Create and Print Blank 2010 Estimated Payment Vouchers](#)

Not applicable for those with no city taxable income

[Instructions for Filing Individual Returns](#)

Use this option to view or print general instructions for preparing Xenia City tax returns.

Xenia Residents with Income or Non-Residents with Business or Rental Income in Xenia

Please read the GENERAL INSTRUCTIONS that were included with your Xenia Income Tax Return for basic information about completing a Xenia Tax Return.

STEP 1 – Welcome

Since you have city taxable income for tax year 2009, you will not be checking any of the boxes in the lower portion of **Step 1**. Click  to continue.

STEP 2 – Personal Info



Verify the information on this screen and make changes as necessary. NOTE: You will not be able to change your filing status or spouse information using the tax tool. Contact the Xenia Tax Office if there are changes to this information. After scrolling down to verify all the information, you must read the **Terms and Conditions** and then select the checkbox next to the line:

I have read and understand and agree to the terms and conditions of using this utility.


This checkbox must be checked to confirm that you have read the **Terms and Conditions** and agree to them before you can continue using the tax tool. After selecting the checkbox, click



STEP 3 – Forms

The **Forms** page allows you to indicate what type of income you have and what forms must be attached to the return when you mail it to the City of Xenia. Select the checkbox for all the forms that apply to your return and enter the amounts requested for each type of income. The screen displayed by clicking  is dependent on the forms you select on this screen. For example, if you select only the checkbox for W-2, then the  will skip the screens related to the other forms such as Schedule C, Schedule E, etc.

STEP 4 – W-2 Forms

Carefully read instructions concerning the entry of W-2s. Note that if you have an employer who withholds for multiple cities, use the  function; **DO NOT ADD MULTIPLE W-2s for the same employer.**

City taxes are generally based on Medicare wages (box 5). *If you are a government employee who was employed prior to the requirement to pay Medicare, you must calculate your Medicare wages to enter on the screen for the tax tool to work properly.* Your Medicare wages are your gross pay (before any reductions for tax deferred deductions such as retirement) reduced by any non-Medicare taxable 125 plans. In many cases, it will be the amount showing in Local Wages, Box 18, but you should verify that this is the correct amount for Medicare wages.

The tax tool will automatically calculate the withholding credit allowed for tax paid to other cities. **You must include a copy of each W-2 showing city tax withheld to receive this credit.**

Xenia City School Income Tax is not the same as Xenia City Income Tax and the school income tax may not be taken as a credit against city taxes. If box 20 says something like "2906", "2906 Xenia", "CS" or "Xenia SD", this is school district tax and may not be credited against city income tax.

When you submit your return, be sure to include a W-2 showing box 5 (Medicare) wages and all W-2s with city tax withheld.

If you have taken 2106 expense, you must attach a copy of your Federal return including Schedule A and 2106. 2106 expense will not be allowed without this documentation.

STEP 5 – Worksheet A

After entering all your W-2s, this screen will display the total income, 2106 expense, Xenia tax withheld and other city tax credit.

STEP 6 – Miscellaneous Income

This screen is used to enter other income (as documented by 1099s). If 1099 income was reported on a Schedule C, do not report it on this screen. Copies of all 1099s must be attached to the return.

STEP 7 – Schedule A-1

This screen will not be used by most taxpayers. Two exceptions are if a taxpayer moved into Xenia and the moving expenses paid by their employer was included in their taxable income in box 5 (Medicare Wages) or if the taxpayer has gambling income listed in Step 6 and has documented gambling losses that could be used to reduce the gambling income. Both of these deductions require the attachment of supporting documentation.

STEP 8 – Schedule C – Self Employment Income, Schedule F – Farm Income, and Schedule Y – Business Allocation Formula.

This screen is used to enter up to 3 Schedule Cs and/or Schedule F income and/or use the Schedule Y – Business Allocation Formula. Please read the instructions carefully for each form. *Copies of the Schedules must be attached to your return.* NOTE: The Business Allocation Formula is to be used by taxpayers who have a place of business outside Xenia to determine the portion of the net profits attributed to that part of the business within the boundaries of Xenia. Businesses located wholly within the Xenia city limits must include copies of tax returns filed and paid to other cities to allocate less than 100% to Xenia.

In no case may business losses be taken against wages or other compensation earned as an employee.

STEP 9 – Schedule E

Carefully read the instructions for completing this form since residents and non-residents have specific and different treatment of their income.

STEP 10 – Schedule H

Use this screen to report any other Xenia taxable income that was not reported on a Federal Schedule.

STEP 11 – Tax Return

This screen will display your 2009 tax return and allow you to enter information concerning your estimated taxes for 2010. Please review this screen carefully before going to the next step. If you discover any errors, you may return to a previous step and make the necessary corrections. When the information on this screen is correct, then precede to the last step.

STEP 12 – Save and Print

Use this screen to save and print your return. **REMEMBER THAT YOUR RETURN HAS NOT YET BEEN FILED WITH THE CITY OF XENIA – YOU MUST STILL MAIL THE RETURN TO:**

City of Xenia
Income Tax Division
PO Box 490
Xenia, OH 45385-0490

Before mailing, please verify that you have attached ALL the required documentation. An incomplete return is not a filed return and can result in late filing charges.

From this screen, you may print and save your return. **Adobe Acrobat Reader must be loaded to print and save your return.** There is a link on this page to load the Adobe Reader.

On **Step 12**, you have the option to:

[Create Printable Copy of Completed Forms](#)

Use this option to view, save or print your Xenia tax return.

[Create and Print Pre-Filled 2010 Estimated Payment Vouchers](#)

Use this option to view, save or print estimated payment vouchers with amounts. The amount on these vouchers assumes that you are enclosing your first quarterly payment with your tax return and that you wish to pay 80% of your estimated tax liability by January 15, 2011. Example – your estimated tax liability for 2010 is \$875 and you pay $\frac{1}{4}$ of that with your return (\$219). To avoid under-estimated payment penalty, you must pay 80% of your estimated liability by January 15, 2011. $80\% \text{ of } \$875 = \700 . You paid \$219 with your return so your estimated payment vouchers will print for \$160.00 $[(\$700 - \$219)/3]$ rounded to the nearest dollar.

[Create and Print Blank 2010 Estimated Payment Vouchers](#)

Use this option to view, save or print estimated payment vouchers without amounts.

[Instructions for Filing Individual Returns](#)

Use this option to view or print general instructions for preparing Xenia City tax returns.