eForms User Guide

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Contents

About This Guide

The Virginia Department of Taxation's eForms system is an easy, fast and free way to file and pay state taxes electronically. This user guide provides instructions for using the eForms System as well as links to other resources that you may use.

In this user guide, you will be able to see images of the eForms screens to assist you before or while using the system to file / pay your tax returns. While the screen images may be of a particular tax form, it does not imply that all forms are the same.
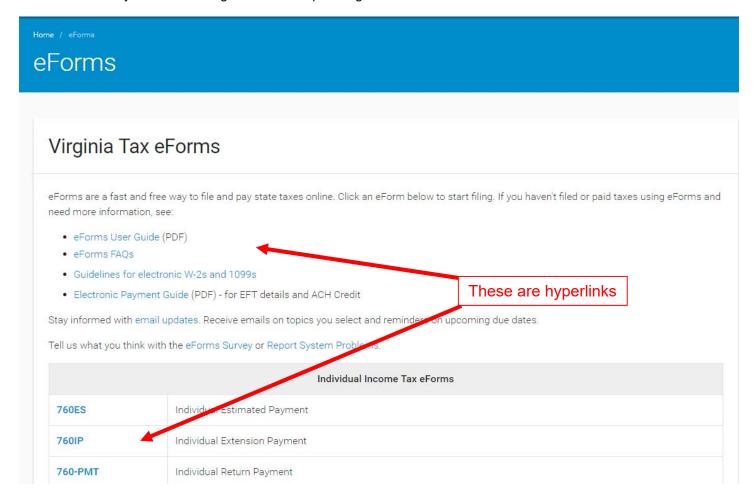
To see a complete list of all of the tax returns/forms supported by this system, visit the eForms page

You may also find assistance in the Frequently Asked Questions section of the eForms page.

eForms Homepage

The eForms Homepage provides not only a list of the returns/forms currently available to you but other resources available to you.

- The eForms User Guide provides details on how to prepare, pay and file an eForm.
- The eForms FAQs is a list of the most frequently asked questions regarding eForms.
- The Guidelines for electronic W2s and 1099s is a document regarding the electronic filing of W2s and 1099s.
- The Electronic Payment Guide details what payment options are available, details on what is needed and how to make a payment.
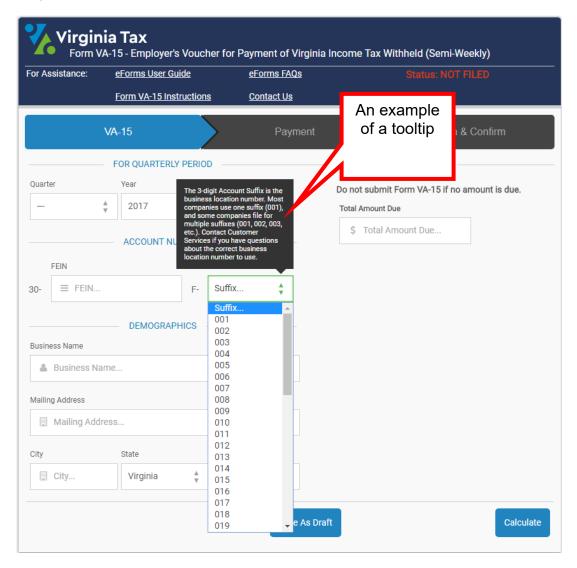- There may also be messages related to upcoming releases of eForms.

An eForm can be selected by clicking on the hyperlink. You will find that each eForm has its own screen and required fields, and some may have prompts that you must read or respond to before moving to the main screen of the eForm.

eForms Basics

Most eForm fields are either required or optional. Some eForms may have fields computed for you or tooltips to assist you in completing the return/form.
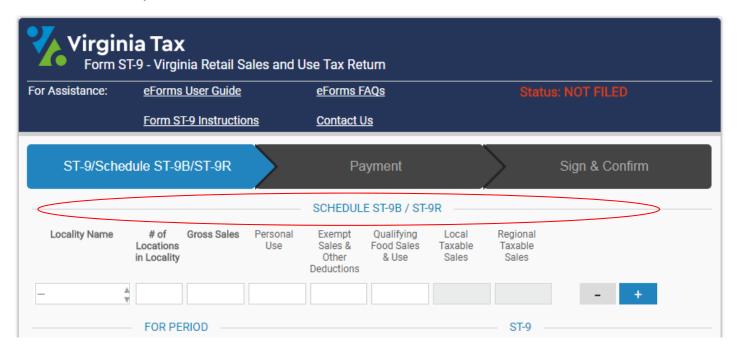
- **Required Fields** – Required fields have **bold** labels.
- **Computed Fields** – Fields that are gray will be calculated for you <u>after</u> you enter the required fields <u>and</u> click the "Calculate" button.
- **Tooltips** – Certain fields contain additional information called tooltips. Move your mouse cursor over a field to view its tooltip.
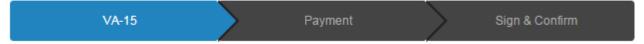

Most eForms have three major sections seen on the initial view:

- For Assistance

- Demographics section, and

- Tax Return Information section

Some tax returns, like the ST-9 shown below, require you to complete a schedule as well. Many eForms have the information conveniently on one screen.

You can see where you are in the eForm steps by looking at the section in blue.

For Assistance Section

The **For Assistance** section contains links to additonal resources and assistance. There are links to the eForms User Guide and the eForms FAQs. If there are return/form instructions or payment guides then there will be links to access those documents.

The Contact Us link allows you to contact us for assistance or to answer any questions you may have while completing of the return/form.

Demographics Section

The **Demographics** section is the first section you will complete and all information is required in this section. Typically, most Business eForms require:

- **Filing Period** – Select the month or quarter, and the year of the tax period being filed. Some eForms will have the Tax Year pre-filled for faster filing.

- **Account Number and Business Location** – Enter your 9-digit Employer Identification Number and for the Account Suffix, select the business location number you are filing for from the drop down menu. This is usually the part of your account number after the F (ie. F001, F002, F003, etc).
- **Business and Address Information** – Enter the business name and full address.

Most Individual eForms require:

- **Social Security Number** – Primary and Secondary person's social security number (if both are applicable).
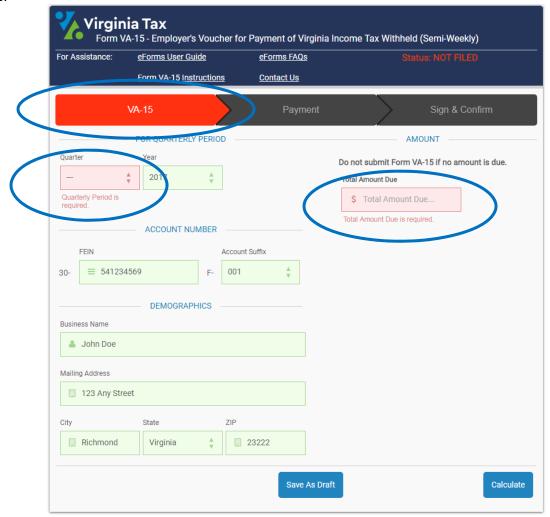- **Name and Address Information** – Enter the full address

Tax Return Information Section

The next section of an eForm is the **Tax Return Information** section.

Enter your tax financial information into the appropriate fields. Remember that only **bolded** fields are required and fields that are gray will be calculated once you click the "Calculate" button.

Resolving Form Errors

Once you click the "Calculate" button, you may find that your tax return contains errors. If there are any errors, the tab is red and all fields with errors are highlighted in red. There will also be a message displayed in red with additional instructions.
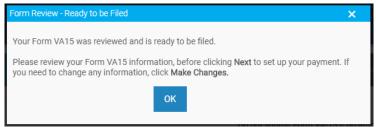
In order to continue filing the tax return:

1. Identify which fields contain errors (they will be highlighted in red).

2. Click in the field to review the error message.

3. Make the correction(s).

4. Click "Calculate" to ensure the errors have been corrected.
   NOTE: You may click "Calculate" to review your form as many times as you need.

Make Changes to an eForm

Once you click the "Calculate" button and there are no errors, a pop-up message will indicate that your form is ready to be filed.

Click "OK", the form is shown once more for you to review your tax return information. If you are ready to move forward to filing and paying, then select "**Next"**. If additional changes are needed, then select "**Make Changes**".
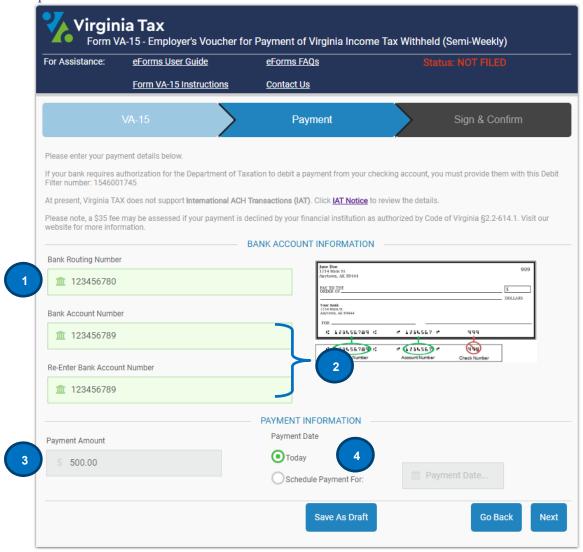

NOTE: You cannot make changes to the tax return once it has been filed, so it is important to review your tax return fully before it is submitted.

Payment Options

All eForms allow you to make a payment using the ACH Debit option, which allows payments to be made from a checking account when you provide your bank routing number and bank account number.

The ACH Credit (EFT) option is currently available for select eForms. The eForms that currently have this payment option are the CT-75, MVR-420, TT-8 and VM-2.

ACH Debit Option

1. **Routing Number** – Enter the routing number of your checking account.

   NOTE: The eForms system only supports payments from a checking account, **NOT** a savings account.

2. **Bank Account Number** – Enter the bank account number of your checking account. To confirm you entered the correct bank account number, you are required to enter it a second time.
3. **Payment Amount** – Enter the payment amount to be debited from your checking account.
4. **Payment Date** – Select the payment date.
   - Today – This is the default option. Your payment will be submitted the day you file your eForm.
   - Schedule payment for – Choose this option to select a future date to submit your payment. You may warehouse your payment for up to 90 days from the date you are filing. Click the calendar icon to select a future payment date.
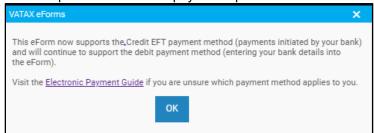
   NOTE: If you select a **Payment Date** later than the due date of the return, you will be subject to penalty and interest.

Click **Next** to continue filing and paying your tax return. OR Click **Go Back** if you want to return to the previous details screen where you can make changes to the tax return OR Click **Save As Draft** to save the information up to this point and return later to complete it.

NOTE: **IAT Notice** – The Virginia Department of Taxation does not support International ACH Transactions, which are abbreviated as IAT. Click the "IAT Notice" button to display full details.

ACH Credit (EFT) Option

The ACH Credit option is currently available for select eForms. A pop up message appears when an eForm is selected that accepts the ACH Credit payment option.
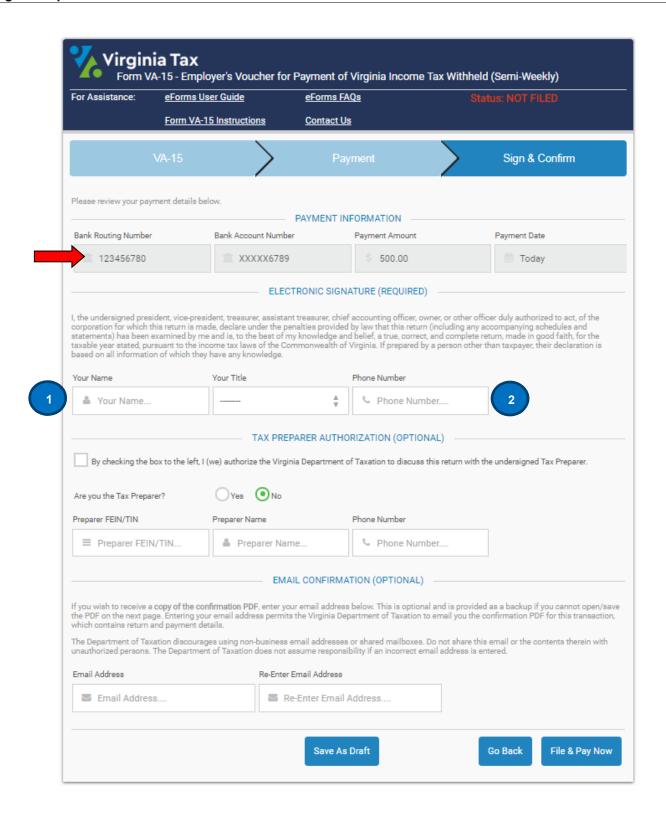
VATAX eForms   ✕

This eForm now supports the Credit EFT payment method (payments initiated by your bank) and will continue to support the debit payment method (entering your bank details into the eForm).

Visit the Electronic Payment Guide if you are unsure which payment method applies to you.

OK

For the eForms that have this payment option, you will see the following payment selections:

VM-2/Schedule VM-2B   Payment   Sign & Confirm

PAYMENT SELECTION

◯ Pay via Credit (EFT) Payment
◉ Pay via eForms Payment

For more information on the electronic payment options, you can go to the **Electronic Payment Guide**.

Payment Details, Electronic Signature and Optional Email Confirmation

After you click "Next", the Payment Details, Electronic Signature and optional Email Confirmation pop-up will be displayed for you to review your payment details once more and electronically sign the eForm.

If the payment information is correct then go to the Electronic Signature fields to electronically sign the return. Entering this information takes the place of a physical signature on your tax return, and is as important and carries the same responsibility as signing the paper tax return. If you have a Tax Preparer or you are the Tax Preparer, you may complete the optional section to provide authorization to discuss this eForm should it be necessary. Some eForms allow you to also enter an email address to send a confirmation page as a PDF (Portable Document Finder) to your email address. The email can be retained for your records as needed and you will still be able to save the information on your computer.

1. **Your Name** – Enter your first and last name.

2. **Phone Number** – Enter your phone number, including your area code.

   NOTE: The Tax Department collects your name and phone number to contact you in the event there are issues with your return.
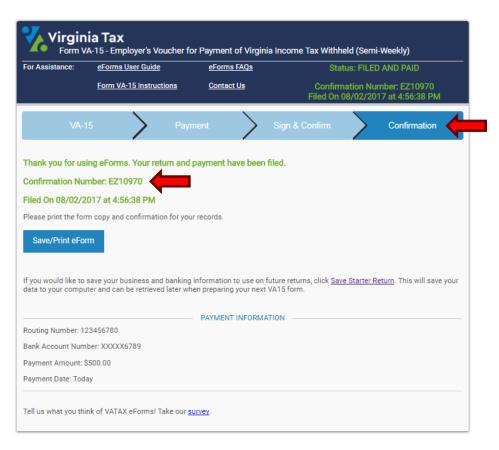
Click **File & Pay Now** to continue filing and paying your tax return OR Click **Go Back** if you want to return to the Payment Details screen to make changes to your payment information. For example, you may wish to change the **Payment Date** you originally selected.

   NOTE: The **Payment Date** cannot be changed once you file your eForm.

Payment Confirmation

After you click "File & Pay Now", the Confirmed Filing page will be displayed, confirming your filing and basic payment details. The Confirmation Number is your proof that you filed your tax return. The payment cannot be confirmed automatically as the information is sent to the banking institution using the bank routing number and bank account number provided.

The option to save and reuse business and banking information (Starter Return) will be addressed later in the guide.
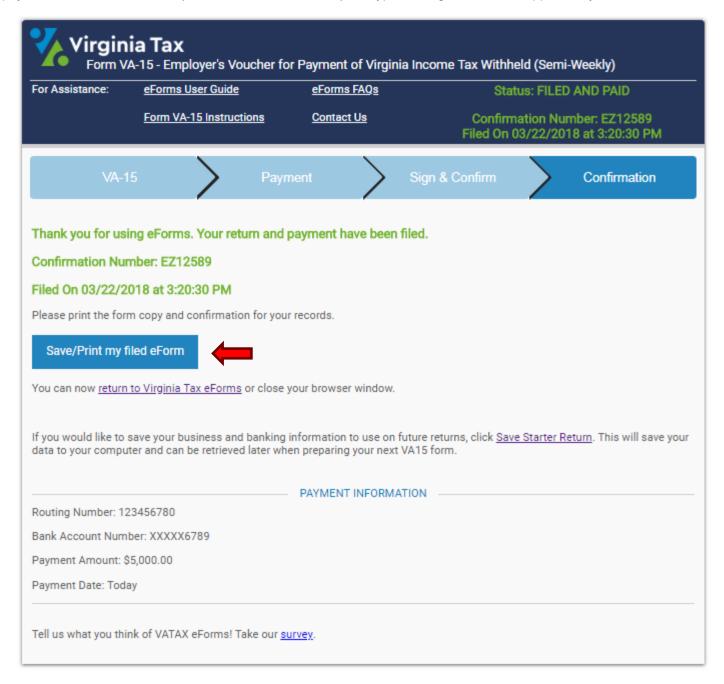

The return page will now provide confirmation number, timestamp and the status of your return.
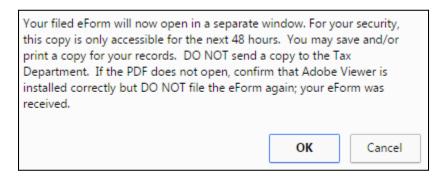
1. **Confirmation Number and Timestamp** – Both items will indicate that the tax return has been filed.

2. **Status** – The status of the tax return now displays **FILED AND PAID** and the text will change from **red** to **green**.

Save/Print Your Confirmation

Once you have successfully filed and paid, you will have the option to save and/or print a PDF copy of your tax return and payment confirmation. A PDF (Portable Document Finder) is a type of image document supported by Adobe.
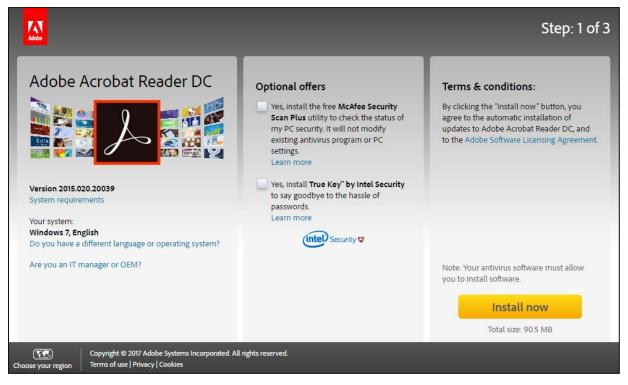

NOTE: It is important to Save/Print a copy of your tax eForm. Your return and confirmation will not be available once you close the screens or exit the eForms system.

Your filed eForm will now open in a separate window. For your security, this copy is only accessible for the next 48 hours. You may save and/or print a copy for your records. DO NOT send a copy to the Tax Department. If the PDF does not open, confirm that Adobe Viewer is installed correctly but DO NOT file the eForm again; your eForm was received.

OK   Cancel

Click "OK" to generate the PDF copy of your tax return. You can open the PDF to view your confirmation, or you can save the PDF file to your computer.

> **_NOTE_**: If your computer cannot open a PDF, Adobe PDF Reader may not be installed <u>or</u> may be out of date. You will be asked to update the Reader from the Adobe website. You will not be able to open the PDF until your Reader is updated. Adobe PDF Reader and any available updates are <u>free</u>.

Example image from the Adobe Reader website.

The PDF contains all of the tax return information you entered, in a format that looks like a paper return. An additional page contains your payment confirmation details the Payment Date and the watermark (This is another reminder to **not** send this copy to the Tax Department).

If you want to save the PDF to a location on your computer or print the PDF, you will select one of the options.

1. Select a folder or other location on your computer to save the PDF copy.

    **NOTE**: To help organize your tax returns, it is good practice to create a specific folder for your copies and to name each copy differently.

2. You may enter a new file name (like in the example above) or use the default name displayed by eForms.

3. Click the "Save" button to finish saving the document to your computer.
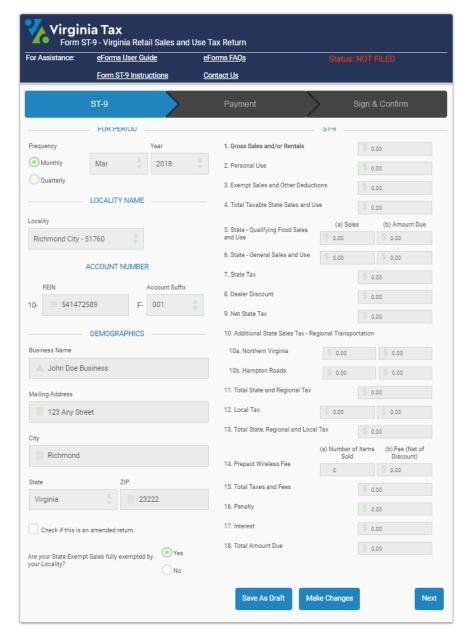
Once you have filed (and paid), and saved and/or printed a copy of your tax return, you may exit the eForm system by closing your internet browser window.
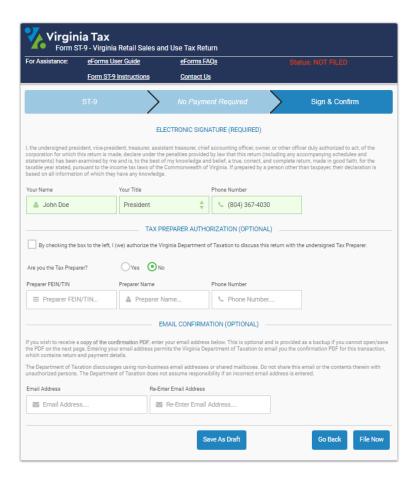
Filing Zero Due Tax Returns

If you file an eForm where no tax is due ($0.00), you must still complete the required fields, review the form and electronically sign the tax return. Since no payment is due, you will skip the Payment Details screens.

**Note:** There are some eForms that do not allow a zero due return to be filed. These eForms will have a note on the return.
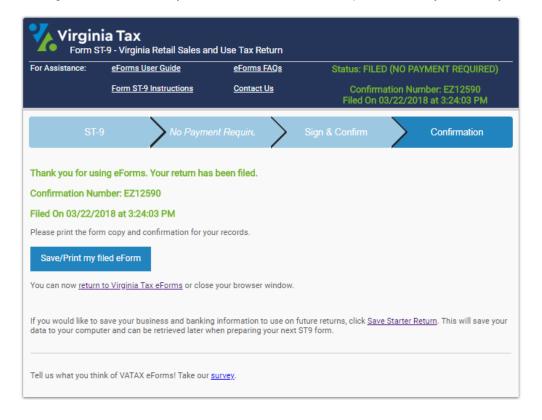
The following example is for an ST-9 Single Locality Filer for Sales and Use Tax eForm where no tax is withheld, i.e. a zero ($0) tax return.

Click **Next** and you will go to the Electronic Signature Page.
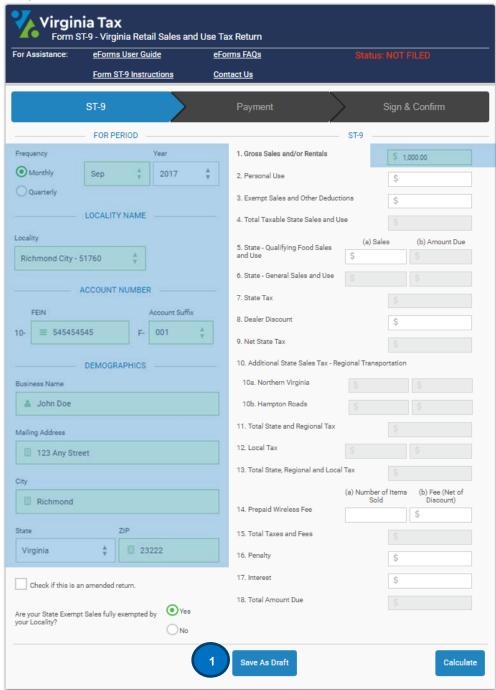
Click **File Now** if the filing is correct and ready to file. You can still save or print the PDF just like any other eForm.
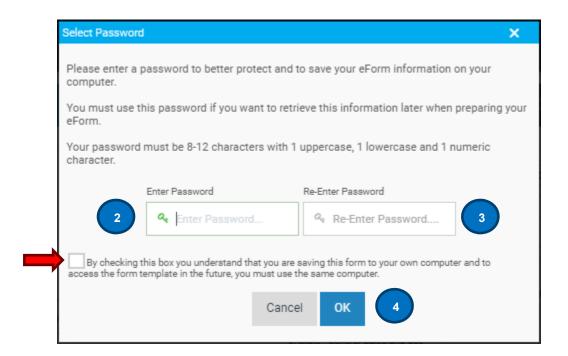
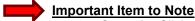# Saving Your Information – Save As Draft Return

As noted earlier, you can save your progress and come back to finish it later in what is known as a <u>Draft</u>. Since the data is saved to your computer, you must continue on the <u>same computer</u> in which you saved the Draft. The example below is a partially completed ST-9 eForm.

1. Click "Save as Draft." The Select Password pop-up will prompt you to choose a password to save your eForm Draft.

2. **Password** – You must enter a password that is 8-12 characters long and includes 1 uppercase, 1 lowercase, and 1 numeric character. To confirm you entered the correct password, you are required to enter it a second time.

3. **Terms & Conditions** – You are required to check this box to indicate that you accept the eForms Terms and Conditions.

4. **OK** – Click this button to save your eForm Draft data to your computer.

 Important Item to Note
   1. **Cancel** – Click this button to return to the tax return details screen.
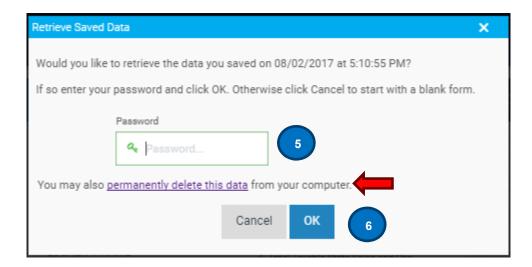
Once you click "OK", a pop-up message will indicate that your eForm Draft data has been saved to your computer.

After you click "OK", you may exit the eForm system by closing your internet browser window. Your eForm information will be saved to your computer to access later.

NOTE: If you delete your internet history before you return to complete the eForm, the saved data may no longer be retrieved.

If you are ready to complete your tax return, visit the eForms home page and click on the eForm you started. You will be prompted for your password to retrieve the data.

5. **Password** – Enter the password you previously chose.

    <u>NOTE:</u> The Tax Department does not store passwords and cannot reset them for you.

6. **OK** – Click this button to open the saved eForm and continue your tax return OR click **Cancel** if you forgot your password, clicking this button will display a blank eForm for you to use OR click **Delete Data** to remove all saved data related to this eForm.
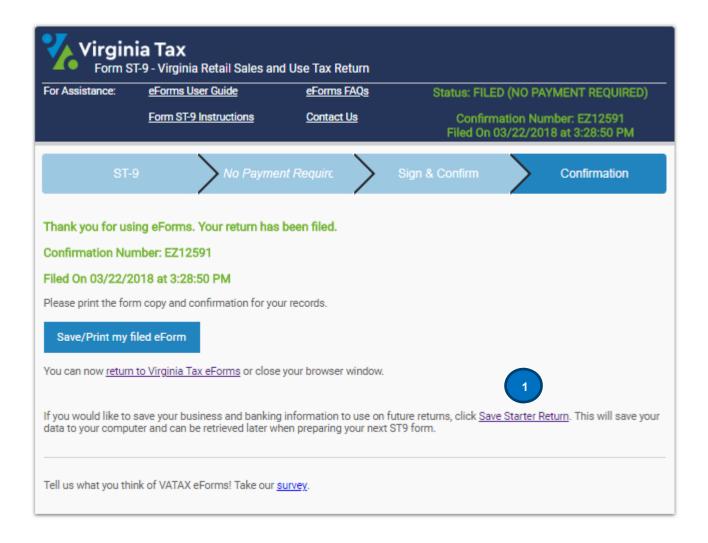
Saving Your Information – Starter Return

As noted earlier, you have the option to save and reuse your business and banking information in a <u>Starter Return</u>.

A Starter Return is a <u>template</u> created from a filed eForm and saves common information that is on each tax return such as name and address, account number, and banking information. It will not save any of the tax financial information that is specific to a reporting period such as payment amounts.

The purpose of the Starter Return is to save you time by eliminating the need to re-enter the same business and banking information each time you file. Since the data is saved to your computer, you can only access your data on the <u>same computer</u> in which you originally saved the Starter Return.

You have the option to save your Starter Return at the Confirmed Filing pop-up once you file (and pay) your tax return.

1. Click the "Save Starter Return" button to start saving your template data.

   The Select Password pop-up will prompt you to choose a password to save your Starter Return.
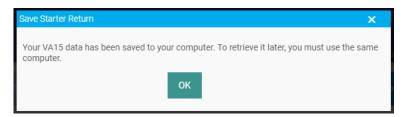
2. **Password** – You must enter a password that is 8-12 characters long and includes 1 uppercase, 1 lowercase, and 1 numeric character. To confirm you entered the correct password, you are required to enter it a second time.

3. **Terms & Conditions** – You are required to check this box to indicate that you accept the eForms Terms and Conditions.

4. **OK** – Click this button to save your eForm Starter Return data to your computer. OR click **Cancel** to return to the Confirmed Filing screen.
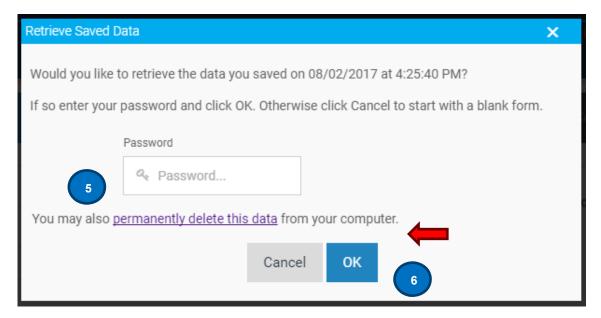
Once you click "OK", a pop-up message will indicate that your eForm Starter Return data has been saved to your computer.

After you click "OK", you may exit the eForm system by closing your internet browser window.

> *NOTE:* Your eForm information will be saved to your computer to access later. If you delete your internet history before you return to complete the eForm, the saved data may no longer be retrieved.

When you are ready to complete your tax return for the next filing period, visit the eForms page and click on the appropriate eForm. You will be prompted for your password to retrieve the data.

5. **Password** – Enter the password you previously chose.

> *NOTE*: The Tax Department does not store passwords and cannot reset them for you.

6. **OK** – Click this button to open the saved eForm and continue your tax return. OR click **Cancel** if you forgot your password, clicking this button will display a blank eForm for you to use. OR click **Delete Data** to remove all saved data related to this eForm.

Return to the eForms Home Page

You can return to the eForms homepage after filing your eForm by clicking on the hyperlink on the Return to Virginia Tax eForms. This is helpful when you need to access additional eForms to file/pay.