

Quick Start Guide to Filing Your Individual Tax Return

If you have not already done so please follow the Individual eServices Quick Start Guide to create your account and set-up your basic information.

This guide is intended for individual users. If you are a professional tax preparer please refer to the 3rd Party Quick Start Guide.

Notes before starting:

It may be helpful to gather all relevant tax information before starting.

As you work on your tax return you will be guided through several sections. This bar will show what section you are currently working on. You may also click in the bar on the section you wish to work on.



Previous and **Next** buttons are also located at the bottom of each screen for easy navigation between sections.

← Previous

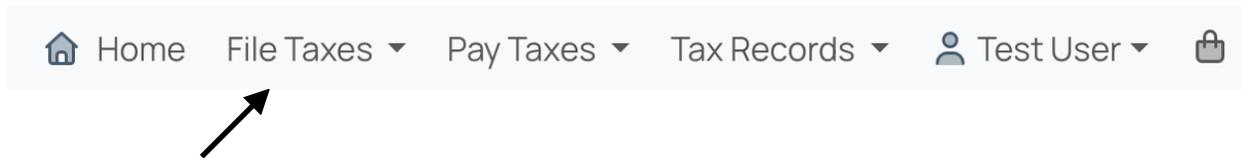
Return ID: 14321006

Next →

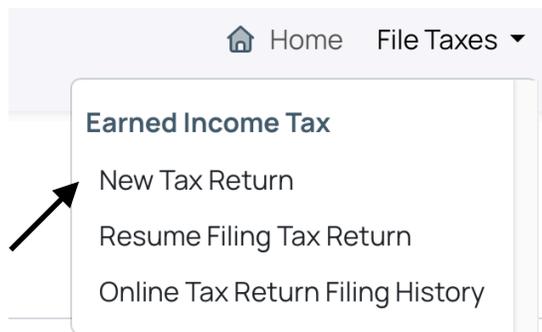
It is not necessary to complete your tax return in one session. At any time you may go to the **File Taxes** menu and choose **Resume Filing Tax Return** in the drop down menu. In the list of tax returns select the return you wish to work on and click **Resume**.

Getting started

1. Locate **File Taxes** in the top menu bar and click.

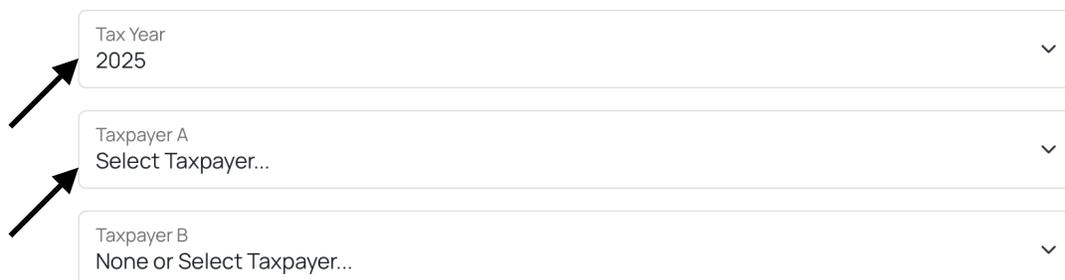


2. A drop down File Taxes menu displays. Click **New Tax Return**.



3. Select the appropriate tax year and taxpayers.

Earned Income Tax Create EIT Final Tax Return



A screenshot of the 'Create EIT Final Tax Return' form. It features three dropdown menus. The first is labeled 'Tax Year' and has '2025' selected. The second is labeled 'Taxpayer A' and has 'Select Taxpayer...' selected. The third is labeled 'Taxpayer B' and has 'None or Select Taxpayer...' selected. Arrows point to each of the three dropdown menus.

4. After you select a taxpayer your mailing address will appear at the bottom of the screen. Confirm this is your current mailing address or update as needed. If everything is correct click **Confirm and Create Tax Return.**

Taxpayer A: John Taxpayer SSN: XXX-XX-1111

Mailing and Residence Address:

123 Any St.
LANCASTER, PA 17601

Update Tax Payer A Address

Taxpayer B: Mary Taxpayer SSN: XXX-XX-2222

Mailing and Residence Address:

123 Any St.
LANCASTER, PA 17601

Update Tax Payer B Address

Confirm and Create Tax Return



Residence Addresses

Your current address will appear on the screen.

Taxpayer A: John Taxpayer SSN: XXX-XX-1111

Address 1	Address 2	City	State	PostalCode	Country	Start Date	End Date	Months	PSD	Actions
123 Any St.		LANCASTER	PA	17601		1/1/2025	12/31/2025	12	LANCASTER CITY	Edit

Add Address

Taxpayer B: Mary Taxpayer SSN: XXX-XX-2222

Taxpayer B Addresses Are The Same

Return ID: 14321006

Next 



*If you did not move during the tax year, click **Next** to go to the next section.*

IMPORTANT - *If you resided at multiple addresses during the tax year you will need to follow the steps on the next page to update the addresses on this screen before moving to the next section.*

1. By the address shown click **Edit** under Actions.

Taxpayer A: John Taxpayer SSN: XXX-XX-1111

Address 1	Address 2	City	State	PostalCode	Country	Start Date	End Date	Months	PSD	Actions
123 Any St.		LANCASTER	PA	17601		1/1/2025	12/31/2025	12	LANCASTER CITY	Edit

[Add Address](#)

Taxpayer B: Mary Taxpayer SSN: XXX-XX-2222

Taxpayer B Addresses Are The Same

Return ID: 14321006 [Next](#)

2. Change the dates to match the dates you resided at that address and click **Save** at the bottom.

Taxpayer A: John Taxpayer SSN: XXX-XX-1111

Address 1	Address 2	City	State	PostalCode	Country	Start Date	End Date	Months	PSD	Actions
123 Any St.		LANCASTER	PA	17601		1/1/2025	12/31/2025	12	LANCASTER CITY	

Start Date

End Date

Address

Address 2nd Line (optional)

City State Postal Code

3. To enter additional residence addresses click **Add Address**.

Taxpayer A: John Taxpayer SSN: XXX-XX-1111

Address 1	Address 2	City	State	PostalCode	Country	Start Date	End Date	Months	PSD	Actions
123 Any St.		LANCASTER	PA	17601		1/1/2025	9/2/2025	8	LANCASTER CITY	Edit

[Add Address](#)

Enter the address, the dates you resided at that address, and the residence municipality information. You may need to scroll down, depending on the size of your screen.

If you need help finding your municipality click on the **Help Finding Municipality** link which will open in another browser tab.

The screenshot shows a form titled "Residence Municipality" with three dropdown menus: "Tax Collection District" (LANCASTER (TCD: 36)), "School District" (LANCASTER S D (PSD: 3610)), and "Municipality" (Select Municipality...). Below the dropdowns is a link labeled "Help Finding Municipality". At the bottom of the form is a dark blue "Save" button. Two black arrows point to the "Help Finding Municipality" link and the "Save" button.

When finished entering your address click **Save**.

- Repeat step 3 as necessary until all addresses that you resided at during the tax year are shown. When you are ready to move on click **Next**.

The screenshot shows a list of addresses for two taxpayers. The first taxpayer is John Taxpayer (SSN: XXX-XX-1111). The list contains two entries:

Address 1	Address 2	City	State	PostalCode	Country	Start Date	End Date	Months	PSD	Actions
123 Any St.		LANCASTER	PA	17601		1/1/2025	9/2/2025	8	LANCASTER CITY	Edit Remove
456 Easy St.		LANCASTER	PA	17603		9/3/2025	12/31/2025	4	LANCASTER CITY	Edit Remove

Below the list is an "Add Address" button. The second taxpayer is Mary Taxpayer (SSN: XXX-XX-2222) with a checked checkbox "Taxpayer B Addresses Are The Same". At the bottom of the page is a "Return ID: 14321006" and a "Next" button with a right arrow. A black arrow points to the "Next" button.

Note for taxpayers filing jointly: Taxpayer B addresses are automatically the same. If you need to make changes for Taxpayer B uncheck the checkbox and a list of addresses copied from Taxpayer A will display. Follow the same steps as above to edit or add addresses.

Taxpayer B: Mary Taxpayer SSN: XXX-XX-2222

Taxpayer B Addresses Are The Same



Return ID: 14321006

Next 

Taxpayer Status

1. Mark any applicable status then click the **Next** button at the bottom right to move to the next section.

Please choose a reason if you are not reporting income for the Taxpayer and/or you wish to update the future status of a Taxpayer.

Taxpayer A: John Taxpayer SSN: XXX-XX-1111

Tax Status Flags:

- Disabled
- Deceased
- Homemaker
- Unemployed
- Student
- Military
- Retired



W2s

You have two options for entering your W2 information - manually or by choosing a file. Choose which option best suits you. Follow these steps until all W2s are entered for yourself and Taxpayer B if filing jointly.

Manually Key

1. Click **Manually Key W2**.

Taxpayer A: John Taxpayer SSN: XXX-XX-1111 Balance: \$0.00

Employer Name	Wages	Tax Withheld	Tax Applied	Unreimbursed Expense	Actions
Manually Key W2					
Import W2 from File/Image					
<input type="button" value="Choose File"/>					
<p>Or drop files here</p>					

2. Enter the requested information from your W2. The form will indicate which boxes to find the information in on your W2.
3. When you have entered all your information correctly click **Save** at the bottom.

Choose a File

There are two ways to choose a file:

1. Drag and drop the appropriate file to the drop files here section OR
2. Click **Choose File** and select the appropriate file on your computer.

Taxpayer A: John Taxpayer SSN: XXX-XX-1111 Balance: \$0.00

Employer Name	Wages	Tax Withheld	Tax Applied	Unreimbursed Expense	Actions
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Manually Key W2

Import W2 from File/Image

Choose File

Or drop files here



When the file has been selected click **Upload and Process**.

Import W2 from File/Image

Choose File

Or drop files here

w2-multiple.png
897.246 KB
Ready to upload

Clear Upload & Process



After the file uploads click **Edit** to review it for accuracy.

Taxpayer B: Mary Taxpayer SSN: XXX-XX-2222 Balance: \$0.00

Employer Name	Wages	Tax Withheld	Tax Applied	Unreimbursed Expense	Actions
Contoso Ltd	\$0.00	\$0.00	\$0.00	\$0.00	Edit Remove Expenses



After reviewing click **Save** to save changes or click **Cancel** to return to the prior screen.

Unreimbursed Expenses

If you have unreimbursed expenses from your employer they should be entered at this time. Click **Expenses**.

Taxpayer A: John Taxpayer SSN: XXX-XX-1111 Balance: **-\$500.00**

Employer Name	Wages	Tax Withheld	Tax Applied	Unreimbursed Expense	Actions
My Employer	\$100,000.00	\$1,100.00	\$1,100.00	\$0.00	Edit Remove Expenses



Click **Add Expense**. Enter your information then click **Save**.

Unreimbursed Employee Business Expenses for My Employer

Description	Amount	Actions
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[Add Expense](#)

[Done](#)

Upload Supporting Documentation of Expenses

Choose File

Or drop files here

You may continue to add additional expenses or click **Done**.

Click the **Next** at the bottom right to move to the next section.

Income Received

*This section may not apply to all taxpayers. If it does not apply to you click **Next** to continue.*

1. If you received any of the schedules listed click on the appropriate button and enter the requested information.

Taxpayer A: John Taxpayer SSN: XXX-XX-1111 Balance: **-\$496.00**

Form Type	Name/Description	Profit/Loss	Taxable Income	Non-Taxable	Actions
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Select an Income Form To Add

Schedule C

Schedule F

1099NEC

1099R

1099 Misc

PA Schedule RK-1

Other Income

2. If you have other local taxable income that you did not receive a form for click **Other Income**.

A drop down menu lists other possible sources of income. Select the appropriate source and enter the amount.

Taxpayer A: John Taxpayer SSN: XXX-XX-1111 Balance: **-\$496.00**

Form Type	Name/Description	Profit/Loss	Taxable Income	Non-Taxable	Actions
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Tax Form Type: Other

Other Income Source

Select Other Income Source...

Income Amount

Click **Save** or **Cancel** to return to the previous screen.

3. Click **Next** to move to the next section.

Tax Credits

*This section may not apply to all taxpayers. If it does not apply to you click **Next** to continue.*

1. For firefighters - if your municipality offers a volunteer firefighter credit click **Volunteer Credit** to claim it.

Taxpayer A: John Taxpayer SSN: XXX-XX-1111 Balance: **-\$496.00**

Total Estimated Payments and Prior Year Credits \$0.00

Form Type	Credit	Amount	Actions
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Select a Credit or Schedule To Add

Volunteer Credit

Missing Payment

2. If you have made estimated payments and the dollar amount is not correct, click **Missing Payment**.

To review your payment history navigate to **Tax Records** in the menu bar. In the drop down menu select **Payments History**. Select taxpayer and click **Lookup**.

3. Click **Next** to move on to the next section.

Refunds & Credit To

*This section may not apply to all taxpayers. If it does not apply to you click **Next** to continue.*

If you are due a refund the dollar amount will be shown here like the example below.

Taxpayer A: John Taxpayer SSN: XXX-XX-1111
Tax Balance Before Refund/Credits: -\$496.00

No Overpayment to Refund

Taxpayer B: Mary Taxpayer SSN: XXX-XX-2222
Tax Balance Before Refund/Credits: \$1,200.00



Refund Amount
\$1,200.00

You may *optionally* chose to apply some of your refund to next year's taxes OR if filing jointly and a balance is due for the other taxpayer you may credit the refund amount to them.

If you wish to do either or both of these options enter the amount in the correct fields and click **Apply Credit To Amounts**.

Taxpayer B: Mary Taxpayer SSN: XXX-XX-2222
Tax Balance Before Refund/Credits: \$1,200.00

Refund Amount
\$1,200.00

Credit To Next Year Amount

Credit To Taxpayer A Amount

Apply Credit To Amounts



A green box will appear and indicate that amounts have been applied.

Credits Have Been Applied



Taxpayer A: John Taxpayer SSN: XXX-XX-1111

Tax Balance Before Refund/Credits: ~~-\$496.00~~

No Overpayment to Refund

Click **Next** to move on to the next section.

Review Tax Return

1. Your completed tax return will display in this section for your final review. Scroll down to review.
2. Additional information may be requested and will be shown at this time. Upload your federal/state tax returns to expedite the processing of your refund by either choosing a file or dragging and dropping the file.

Tax Return(s) are Ready to Submit ⓘ

Taxpayer A: John Taxpayer SSN: XXX-XX-1111

To accurately review your return and avoid delays in processing, all applicable supporting documentation must be uploaded with your return. Tax Return filings received without substantiating documentation for the taxable income reported will be deemed incomplete.

Upload Federal/State Tax Returns and Additional Information for Taxpayer A or Joint Documents

Choose File

Or drop files here

Line 1: Gross Compensation	\$100,000.00
Line 2: Unreimbursed Employee Business Expense	\$250.00
Line 3: Other Taxable Income	\$0.00
Line 4: Total Taxable Income	\$99,750.00

3. When you have completed verifying your return click **Submit** at the bottom right. (A pdf will be available on the next screen for you to download for your records.)

Line 15b: Credit to Spouse	\$496.00
Line 15c: Credit From Spouse	\$0.00
Line 16: Tax Return Balance	\$0.00

← Previous

Return ID: 14321006

Submit →

4. A green box will indicate that your return has been successfully submitted.

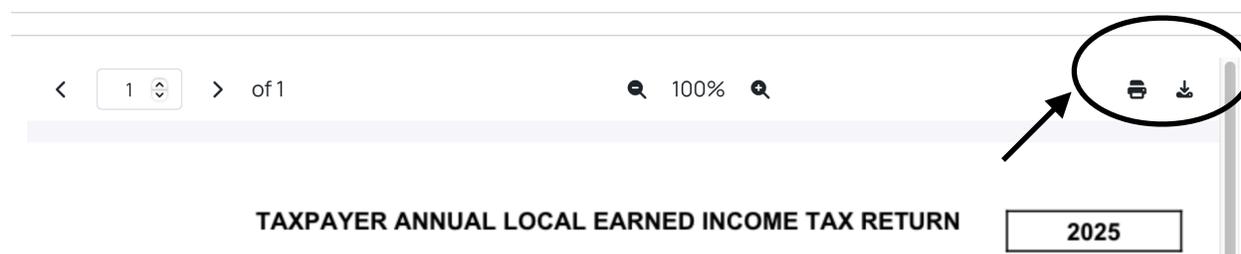
Tax Return Submitted to Tax Bureau

Individual Final Return with ID 14321007 Has Been Submitted

5. At this time you may print or download a pdf of your tax return for your records.

Taxpayer B: Mary Taxpayer SSN: XXX-XX-2222

Taxpayer B: Tax Due \$0.00



6. At any time you may view submitted tax returns by selecting **File Taxes** in the menu bar and choosing **Online Tax Return Filing History** in the drop down menu. A list of submitted returns will display. From here you may select a return to download a pdf or you may amend your return if needed.