

STEPS TO SETTING UP AN ACCOUNT ON THE WESTERVILLE TAX PORTAL:

<https://web2.civicacmi.com/WestervilleTax/>

- 1). You will need to read and accept the disclaimer
- 2). Click on "Register for a Web Login" – you will need your Westerville Account # (XXXXXX-R or XXXXXX-W) in order to proceed. Please call 614-901-6420 for assistance if you do not have your account number.

**** You will only "Request a new tax account" if you have NEVER had an account with us before.
- 3). Complete the register information on the portal and click register
- this will send an email to you confirming registration - you will need to click on the link for confirmation.
- 4). Go in accept disclaimer again, login and your account is setup and ready to access.

INDIVIDUALS: If you want to MAKE A PAYMENT on the portal:

- 1). You will need to click on "Pay by Check" and setup your bank account information.
 - a. Once this is setup – when you go into "Pay by Check" then you will select what you want to pay.
 1. Tax Due or Estimated Tax or Interest/Penalty
(You will have to fill in each of the following questions)
Choose the tax year
Make sure correct account- Individual account #'s end in a "R"
Effective date: when do you want your payment dated for
Period ending date: what period is your payment is for (y/e of tax year or Qtr ending date for estimates)
Payment amount: Self explanatory. Then submit.
- If you have a tax and P&I Balance – you will need to break this out when making your payment.
 2. If you are paying on an installment plan
- select "Pay Plan", effective date (when you want your payment to be paid) and amount. Then submit.

INDIVIDUALS: If you want to FILE A RETURN on the portal:

- 1). Click on "Individual E-File" – then "Start a new form" or "Continue" if you have already tried to start one.
- 2). Select the year , then continue and it will step you through filing your return.
 - a. you will need to enter each of your different types of income (W-2, W2-G, Sch C (or 1099-Misc), Sch E, K-1 or Schedule F) separately on the screen. Once you enter this information, click on "upload forms" on the right and upload any documents pertaining to the information just entered. When done uploading – click on "Done" at the bottom of the screen and it will take you back to the main screen and you can click "next" to continue

- at the end it will give you an option to "Review as pdf in new window and print"

- If everything looks good, then click on "I certify" at the bottom of the original screen and "Submit"

You have filed your return – an email confirmation will be sent that it has been submitted.

BUSINESS – WITHHOLDING ACCOUNTS: If you want to make a WITHHOLDING PAYMENT:

- 1). Click on “Pay by Check” and setup your bank account information.
 - a. Once this is setup – when you go into “Pay by Check” then you will select what you want to pay.
 - Tax Due or Withholding or Interest/Penalty(You will have to fill in each of the following questions)
 - Choose the tax year
 - Make sure correct account- Withholding account #'s end in a “W”
 - Effective date: when do you want your payment dated for
 - Period ending date: what period is your payment for
 - Payment amount: Self explanatory. Then “submit”.
 - If you have a tax and P&I Balance – you will need to break this out when making your payment.

BUSINESS – WITHHOLDING ACCOUNTS: If you want to ENTER A RECONCILIATION:

- 1). Click on “Business E-File” and “Create WW3”
 - a. When all information is entered click on “Save”

You have submitted your reconciliation – an email confirmation will be sent.
 - b. You will need to upload W-2’s under “Upload Documents” and then you are finished.