RBA's PA Earned Income Tax Application Software

eFiling – Individual Web Based Tax Return Filing System

The Most Comprehensive System Available Today

Successfully Completed SAS 70 Audit at the Capital Tax Bureau.

This stand-alone application allows you to interface with other back office software. You are not required to purchase the RBA EIT back office system.

- **The system allows a taxpayer to file as an individual or combined with his/her spouse.**
  - On a combined return, the system maintains separate calculations for each individual.
    - Necessary for comparing against the PA Department of Revenue file.
  - Allows the option of filing a Short or Long Form.
    - The Short Form is used for taxpayers who lived at one address during the tax year reporting only W-2 earnings (one or more) with or without UE (expenses).
    - The Long Form is used for other taxpayers who do not qualify to use the short form, especially those with complex tax returns.
  - There are no constraints on what type of tax return can be filed.
    - Balance Due, Refund, Even.

- **Taxpayers who lived any portion of the year in one or more of the jurisdictions collected by your office can file.**
  - The system supports jurisdictions the Tax Office collects for, jurisdictions the Tax Office partially collects for, and jurisdictions the Tax Office does not collect for.
  - An unlimited number of addresses and occupancy dates are tracked.
  - Filing a combined return allows for spouses who move on different dates or live at separate addresses.
  - The sophistication of software accounts for both the portion of year taxpayers lived in your jurisdictions as well as the residencies that fall out of your area, out of state or out of the country.
  - Part year residencies do not fall through the system.
  - The system can track mailing addresses that are different than residential addresses.

- **Automatically allocates to all jurisdictions Earnings, Tax Due, Withholdings and Credits based on the date span of the income source in conjunction with the residency information.**
  - Taxpayer input screens closely follow the format of the forms for the various income types taxable for PA local Earned Income and Net Profits Tax purposes.
    - This makes the system user friendly – the taxpayer simply fills the screen based on their paper reporting forms.
  - The number of forms that can be entered as part of the filing process is unlimited.
  - Accepts all types of income forms and the associated applicable dates.
    - Income forms accepted include the W-2, various 1099s, Miscellaneous Income, Schedule C, Schedule E, Schedule F, and Schedule K-1.
    - The W-2 form includes a Business Expense Entry form to record the Unreimbursed Business Expenses (UE) and ensures that expenses do not exceed the income.
    - The W-2 form allows reporting of whether the wages were subject to Philadelphia Tax.

- **Accepts all types of credit forms and the associated applicable dates.**
    - Credit forms accepted include Quarterly Payments, Prior Year Credit, Philadelphia Credit, Schedule G (out of state credit) and Other (Miscellaneous) Credits.
        - The Other Credits form is included should your office have special credits such as LST credits or low income exemptions.
    - Philadelphia and Schedule G Credits are automatically calculated to determine the credit amount to be allowed to each jurisdiction based on their tax rates.
        - The rate tables are easily updated when PA rates change.
    - If a loss is determined based on the sums of Schedule C, E, F or K-1, the system can create an automatic adjustment to offset any disallowed loss to zero.

- **The Tax Return**
    - Calculations performed by the system ensure that all earnings, credits and withholdings are accounted for.
    - Penalty and Interest can be calculated automatically if the tax return is filed after the due date.
    - A detailed return and summary report is available to print on demand by both the individual and the Tax Office. This report includes the following:
        - The Tax Return, in detail with a summary overview page.
        - A voucher to use to pay taxes by mail or in person.
        - A listing of jurisdictions you do not collect for where filing is required along with the appropriate allocated earnings.

- **Payments and Refunds**
    - Multiple payment options are provided.
        - Taxes due can be paid online through a third party website.
        - A voucher can be printed to mail or bring with the payment to the Tax Office.
        - ACH Debit or Credit options can be added for offices that wish to offer this service.
    - Multiple refund options are provided. The Taxpayer can choose any combination of the following:
        - A refund can be used as a credit toward taxes owed by a spouse when filing combined.
        - A refund can be applied as a credit for the next year's taxes.
        - A refund can be paid by check or directly deposited using ACH if supported by the Tax Office.

- **Miscellaneous**
    - Many options are configurable to the way your Tax Office does business.
    - All help text can be edited by the Tax Office.
    - All of the information collected is available through the extract interface. Each office can choose how much or little data is beneficial to import into their back office system.
    - The Tax Office can use on-line filing data to create reports even if it is decided not to import the data into a back office system.
        - This can be used to streamline mailings to taxpayers for missing documentation or additional information.
    - Original returns are encrypted and stored for viewing by the Tax Office when needed.
    - Tax returns can be accessed using the return ID, the individual's SSN, or the spouse's SSN if filing combined, allowing the Tax Office to research tax returns when information may be limited as to the date or time of filing.

- **The Tax Office use of the eFiling software is supported by the fully staffed RBA Client Support Center.**