City of Tuscaloosa

Revenue Department
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INSTRUCTION PAGE

Local governments (cities and counties) have the authority to administer their own taxes, authorize the Alabama Department of Revenue to administer their taxes, or hire a third-party tax administrator.

You will often see or hear reference to 'State-administered' and 'Non-state administered' local taxes:

State Administered local taxes are those taxes that the local government authorized the Alabama Department of Revenue to administer on their behalf.

Non-State Administered (NSA) local taxes are those taxes that the local government self-administers or hired a third party administrator to administer for them.

1. Go to the Alabama Department of Revenue's (ADOR) e-filing site http://www.revenue.alabama.gov
2. On the left side of the page you will see **My Alabama Taxes.**
3. Visit MAT to check your refund status or businesses can register for new tax accounts, file & pay business-related taxes.
4. Sign in to My Alabama Taxes (MAT).
5. Click the ID hyperlink for the Local Tax Account
   a. If Local Taxes (LCL) is not listed,
   b. Click "**Add Access to Another Account**"
   c. Account type is **LOCAL**
   d. You will be ask for an account #, the Account # is **9501…../R000……**
   e. Enter e-file / access code and sign on ID (provided by the State)
6. Select the **File Now** hyperlink for a period to file a Local Tax return.
7. Click on the **Return Table** button to fill out the Local Tax return.
8. Click on the **description link in Step 1** for detail information and instructions regarding the Local Return Table. Please take the time to read through the description information before you begin your first filing.
9. Click in the 'Locality' green field to begin typing the locality name. The list will filter to a short list to select from or you can use the dropdown arrow to find and select the locality. Continue down that column to fill out the tax information for that locality.
10. **Your Jurisdiction Account is your City of Tuscaloosa Account Id# (6 digits)**
11. To add the next locality to the return, either click the Copy Record link at the bottom of the column, or click into the Locality field in the next empty column to the right. NOTE: If you select the One-Time Filing box, that column of information will not be on your return profile next month. One-Time Filing is used to indicate that you had a sale in this locality one time and do not need to file a return for that locality each month.
12. Once the appropriate information is filled out on the return, click the OK button. The table will show 5 columns of return information on the screen.

13. After clicking the OK button on the return… The message shown in the popup is dependent on the localities entered on the Local Tax Return. The counties listed are county filing expectancies that should exist on the return for the localities previously entered. Click the OK button after reading the information provided.
14. A **County Expectancies** button is now available to review the county expectancies that were mentioned in the popup box before.
15. Counties are listed with the corresponding locality that generated the expectancy.
16. Check the box in the Generate? column for each county expectancy that needs to be added to the return and click the Ok button.
17. If there are no county expectancies to generate, click **Cancel.**
18. Next to the **Return Table button**, a message and corresponding icon indicate the status of the Return Table. If the Return Table is in error, all errors will need to be fixed before continuing. Click the **Next** button once all the appropriate information is filled out on the return.
19. The summary page displays the amounts from each line of the Local Tax Return broken down by either State or Non-State Administered Localities. Penalty, Interest and Discounts are summarized on this page as well. The **Review Return Table** button displays a summary of the values entered into the return.
20. An ADOR approved credit may be entered on this summary page on the **Credit Claimed (ADOR Approved**) line. Click the **Next** button.
21. Information about Debit Block Codes is provided
22. If there is an amount due for State-Admin Localities, the taxpayer may opt out of paying that amount by checking the **Opt-out of paying ADOR amount due box**. (ADOR Payments less than $750 may be paid by check – greater than $750 will be treated as an uncontested tax liability and may proceed directly to Final Assessment.)
23. An electronic payment for the Non-State Admin amount due is <u>required</u> to submit the return.
24. The **View Details** hyperlink details the amount due listed by each Locality, Code and Jurisdiction account. (These details aren't printable on this screen, but will print with the return confirmation.)
25. Enter the appropriate banking information to make a Local Tax payment. If the taxpayer has filed & paid a local return in MAT prior to July 1st, their banking information will be available, but may require that they update the banking information to provide the Customer Type – this is a new field required by the payment processor.
26. This banking information can be saved and used for payments due on future filing periods by checking the **Save Payment Source box**. (If the taxpayer has filed & paid a local return in MAT prior to July 1st, their banking information will be available, but may require that they update the banking information to provide the Customer Type – this is a new field required by the payment processor. See the next slide about changing/updating the banking information.)
27. If the banking information needs to be edited, the taxpayer may check the **New Payment Information** box.
28. The total payment amount is displayed at the bottom of the screen.
29. Click the **Submit** button to submit the return and payment.
30. You must enter the Password to authorize the submission of the return and payment.
31. The **<u>return and payment</u>** has been submitted. A copy of this confirmation message and a copy of the return can be printed.
32. If the taxpayer opts out of paying the amount due for the State Administered Localities, a voucher can be printed to include with a paper check to ADOR for those localities.