



## OH|TAX eServices FAQs

**Q1: Will a current OH|ID log in work on OH|TAX eServices?**

A: Yes, a tax preparer or taxpayer may use their existing OH|ID to log in or create a new OH|TAX eServices account. If they already have an account through OH|ID (e.g. Ohio Business Gateway or Online Notice Response Service), they can utilize the same username and password. They will be required to provide some additional information when registering for a new OH|TAX eServices account.

**Q2: For Business taxes (withholding, sale & use tax, school taxes) I currently use the Ohio Business Gateway. Is this OH|TAX eServices taking the place of the Gateway?**

A: No, Gateway will not be impacted. The only changes will be to the individual and school district income taxes.

**Q3: Does OH|TAX eServices allow a taxpayer to file their tax return?**

A: Yes, taxpayers can file original or amended returns for individual and school district income taxes.

**Q4: When filing a return, can a taxpayer import any data from other systems (w-2 or tax preparation software)?**

A: No, taxpayers will not be able to import w-2 or other data from other systems.

**Q5: How does a client grant a preparer access to their OH|TAX eServices account?**

A: Preparers will be able to request access to a client's information/account through OH|TAX eServices. A request letter will then be sent to the client authorizing the access to their OH|TAX eServices account. Clients will then be required to provide the PIN from the letter to their preparer before access is granted. This 1 to 1 communication and PIN method is used to help ensure the client is providing access to the correct preparer. Taxpayers will not be assigned to any preparers when the system is live, and OH|TAX eServices access requests must be made one client at a time.

**Q6: How quickly will a PIN request be mailed to client to give preparer access to the client's OH|TAX eServices account.**

A: The letter will be sent the following business day after access is requested. However, the client can also create an OH|TAX eServices account of their own and immediately access the PIN as soon as the preparer access request is initiated.

**Q7: Can a preparer set up a client OH|TAX eServices account on their behalf?**

A: No, the Department does not recommend that you set up an account on a client's behalf. OH|ID will require two-factor authentication and you would effectively lock your client out of the system for future use if you set that up using your email or phone number.

**Q8: Will you need a power of attorney or TBOR1 to obtain taxpayer information?**

A: No, a power of attorney or TBOR-1 will not be used to grant access to the client's OH|TAX eServices account.

**Q9: Can preparers make a firm OH|TAX eServices account rather than an account per individual, or must they be per individual due to using the OH ID?**

A: No, OH|TAX eServices accounts will need to be set up per individual due to OH|ID.

**Q10: Does OH|TAX eServices "interact" with tax preparers' tax software?**

A: No, OH|TAX eServices will not directly interact with any preparer tax software. Once a return is posted and finalized, preparers will be able to view the return on OH|TAX eServices. Most returns will process within 3 to 4 business days. However, some returns may be held up for identity verification or manual review.

**Q11: Will the client be able to log in and see the messages and actions a preparer has done on their behalf?**

A: Yes, if the client has an OH|TAX eServices account, they will be able to see the messages, actions, payments, and returns that a preparer completes on their behalf.

**Q12: Would I need to request OH|TAX eServices access for both the primary taxpayer and spouse to file a joint return?**

A: No, you would not. Access is only required for one taxpayer to file a joint return.

**Q13: As a tax preparer, can I submit an amended return for a client via OH|TAX eServices? Does the Ohio return have to be filed originally through OH|TAX eServices to amend it there?**

A: Yes, you may submit an amended return for a client through OH|TAX eServices assuming you have been granted access to their account.

**Q14: Does the Ohio return have to be filed originally through OH|TAX eServices to amend it there?**

A: No, you may file the amended return through OH|TAX eServices regardless of how the original return was filed.

**Q15: As a preparer, will I be able to confirm client overpayments carried forward and estimates paid?**

A: Yes, once you get access to a client's OH|TAX eServices account, you will be able to see all estimated payments, credit carryforwards, and extension payments.

**Q16: Is there a service or convenience fee for payments made with a credit or debit card?**

A: Yes, Ohio has partnered with a third party to process credit and debit card payments, who does charge a convenience fee.

**Q17: Can preparers or taxpayers request wage and income statements through OH|TAX eServices? How many years will be available?**

A: Yes, using OH|TAX eServices, preparers and taxpayers will have the capability to request wage and income statements (W-2, 1099-R, and W-2G) for up to 10 years. Current tax year income statements would become available starting on May 1st (ex: tax year 2023 statements would become available on May 1, 2024). All box information will not be available. Ohio wages, Ohio withholding, and school district wages/school district withholding (if applicable) will be listed on the income statements. To request statements older than 10 years, taxpayers and preparers may contact customer service.

**Q18: Why will wage and income statements for the current tax not be available until May 1st?**

A: The purpose for this is to allow the Department time to obtain, verify, and correct wage statements/withholding. This closely follows the IRS who does not make current year wage and income transcripts available until the end of May or early June. We would always encourage taxpayers to contact their employer or payer for their current year wage statements first before contacting and requesting from the Department.

**Q19: How many years of tax returns are available to access via OH|TAX eServices?**

A: Up to 10 years of returns will be available when requesting a transcript. After 10 years, they will become unavailable.

**Q20: Do estimated payments that are mailed in show up on OH|TAX eServices?**

A: Yes, once the payments are processed, they will be visible on OH|TAX eServices, regardless of the original payment source.

**Q21: Will amounts that have been turned over to the Ohio Attorney General still be available to make payments on?**

A: Yes, you will be able to make payments directly to an assessment that has been certified with the attorney general.