



OH|TAX eServices

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Legal Disclaimer

The information provided in this presentation is given for general guidance only and does not constitute legal or tax advice. Any legislative or legal changes that take place after the date of this presentation may change the accuracy of this content. Additionally, facts and circumstances applicable to your situation may impact any answer provided herein.



Please contact the Department directly with any questions.



Individual Income Tax - (800) 282-1780

Business Taxes - (888) 405-4039

Tax Practitioners Hotline - (855) 728-1055



To access your OH|TAX eServices account, you will need to log in or create an account via OHID. Recommended browsers are Chrome, Edge, & Safari.

[→ Log in or Create an OHID Account](#)



Individual

Make a payment, check a refund status, or verify the identity on an individual income or school district tax account.

- > [Make an income tax payment](#)
- > [Check my income tax refund status](#)
- > [Verify my identity](#)



Business

Make a payment, check credit information, and apply for a sales/use tax refund on a business account.

- > [Make a business tax payment](#)
- > [ACH credit information](#)
- > [Apply for a sales/use tax refund](#)



Self Help

Review additional resources to help with OH|Tax eServices navigation, eligibility, and registration.

- > [Check if you are eligible for Individual Income Tax on OH|TAX eServices](#)
- > [View features available within OH|TAX eServices for individuals](#)



Can I help?

OH | TAX OBJECTIVES

Improve taxpayer service by creating a seamless and user-centric experience

Modernize and consolidate the technical systems

Keep taxpayer information secure

ENHANCED TAXPAYER EXPERIENCE



Taxpayer dashboard



File and amend
previously filed returns



E-Correspondence



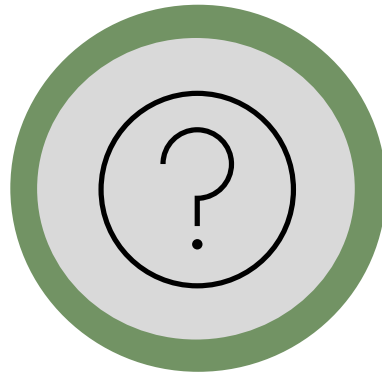
2-way secure
messaging



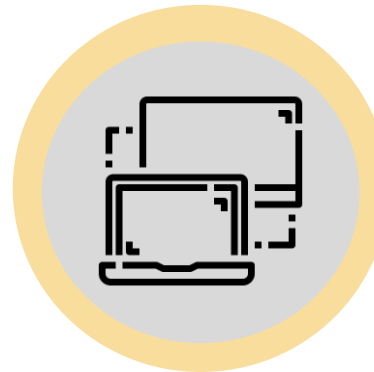
Tax Preparer access



Digital assistant



Dynamic Help



Snapshot Screen Share



Phone Integration

RELEASE 2 PROJECT SCOPE

Went Live on 12/9/2024

- Sales and Use
- Employer and School District Withholding
- Public Utility Personal Property (PUPP)
- Public Utility Excise Tax (PUET)
- Natural Gas (mcf)
- Adult Use Cannabis

Access through the Ohio Business Gateway or visit tax.ohio.gov/ohtax

- Individual and School District Income Tax went live on 9/5/2023

OH | TAX RELEASE 2



RELEASE 2 CONVERSION HIGHLIGHTS

# of OBG Users	597,532
# of Taxpayers	767,729
# of Records	> 86 million
\$ of financials	\$6 billion

RELEASE 2 STATS TO DATE (1/13/2025)

Sales Tax Returns Processed	227,539
Sales Tax Payments Processed	176,835
Employer Withholding Payments Processed	290,054
Total Payments Processed	>\$2.8 billion

OH|TAX: WHAT'S NEW WITH PHASE 2

GUEST USER FUNCTIONS OF OH|TAX

- Check My Refund Status
- Identity Verification
- Apply for Sales tax Refund

- Payments
- Respond to Letter or Notice
- Interest Calculator



Individual

Make a payment, check a refund status, or verify the identity on an individual income or school district tax account.

- > Make an income tax payment
- > Check my income tax refund status
- > Verify my identity



Business

Make a payment, check credit information, and apply for a sales/use tax refund on a business account.

- > Make a business tax payment
- > ACH credit information
- > Apply for a sales/use tax refund



Self Help

Review additional resources to help with OH|Tax eServices navigation, eligibility, and registration.

- > Check if you are eligible for OH|TAX eServices
- > View features available within OH|TAX eServices for individuals
- > View features available within OH|TAX eServices for businesses



Respond to a Letter or Notice

Respond to a letter or notice you have received from the Ohio Department of Taxation (ODT).

- > Submit response
- > Pay a bill or assessment



Withholding Bulk File

Find more information about becoming a bulk filer for Employer Withholding and School District Withholding returns with the Ohio Department of Taxation (ODT).

- > Register for bulk file
- > Help with bulk file
- > Validator for bulk files



Additional Resources

Find more information on submissions, eligibility, and how to calculate interest.

- > Find a submission
- > Calculate interest

GAINING REPRESENTATIVE ACCESS

For Business clients:

- **Manage Client Access on OBG**
 - Client relationship must be established on OBG before coming to OH|TAX eServices
- **OBG Roles**
 - Filing Admin – Automatically given account access with the permission to file and pay
 - Filers and Non-Filers will need to request access to the tax type on OH|TAX eServices

For Individual clients:

- **Manage Client Access**
 - Manage existing access, requesting access to client information, and submitting PIN.
- **Manage Delegated Access**
 - Delegating or removing access for other preparers

OH|TAX:
WHAT'S NEXT?

OH|TAX PHASE 3



DEMO TABLE OF CONTENTS

- **Accessing OH|TAX eServices through the Gateway**
- **Viewing a list of clients**
- **Account summary page and balances**
- **Requesting and Approving access**
- **Registering an Account**
- **Filing and Paying**
- **New Features**



Staying Informed

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