

B.E.S.T. Seminar



How to Register Your Tax Account(s) in My Alabama Taxes

Contains:

- 1. Before You Start**
- 2. Registering for My Alabama Taxes (MAT)**
- 3. Filing a State Tax Return**
- 4. Filing a Local Tax Return**

*My Alabama Taxes (MAT), the official web application of
the Alabama Department of Revenue, offers a Help Page to assist you.
The link to the help page is:*

<https://myalabamataxes.alabama.gov/webfiles/help/index.html>

1. Before You Start

You will need the following account information to sign up for My Alabama Taxes (MAT):

For Individual Income Tax accounts:

- Social Security Number (SSN)
- Previous year's Alabama Adjusted Gross Income. (A previous year's Individual Income Tax Return must have been filed with ADOR to sign up for MAT.)
- Valid e-mail address. (Required to receive confirmation e-mails and authorization code messages.)

For Business accounts:

- Account Number. (Your ADOR 10-digit account number located on all correspondence sent from ADOR.)
- Sign-On ID. (Automatically assigned upon registration of business with ADOR.)
- Access Code. (Automatically assigned upon registration of business with ADOR.)
- Valid e-mail address. (Required to receive confirmation e-mails and authorization code messages.)

2. Registering for My Alabama Taxes (MAT)

To sign up, go to the MAT online portal at https://myalabamataxes.alabama.gov/_/
Click on “**Don’t have a logon? Register here**” under the Logon button.

Step 1 – Validate Account

- Select an account type. (*Note: Not all account types are available in MAT. Tax types available in MAT are listed in the account type drop down.*)
- Provide account information.
- Click the **Next** button near the bottom of the window. If your information was not validated, please contact ADOR.

Step 2 – Create a Username and Password

- Create and enter a username in the **Username** field.
- Create and enter a password in the **New Password** field. (*Note: The password must be 8-16 characters in length and must contain at least one number and one letter.*)
- Retype the password in the **Confirm Password** field.
- Select a secret question to be used to verify your identity in the event you need to reset a forgotten password.
- Enter your answer to the secret question in the **Secret Answer** field.

Step 3 – Enter Contact Information

- Enter your name in the **Your Full Name** field.
- Enter your e-mail address in the **Email** field and retype it in the **Confirm Email** field.
- Enter your telephone number in the **Contact Phone** field.
- If applicable, enter an alternate telephone number in the **Alternate Phone** field.

Step 4 – Set Third Party Access

- Indicate whether you want third parties to be able to access your account on MAT. Select Yes if you intend to have a tax preparer or accountant file or pay your taxes on MAT. Otherwise select No.
- If applicable, create a password for third parties to access your account on MAT. Since you will give this to a third party, do NOT use one of your existing passwords.

Step 5 – Submit Registration

- Click the **Submit Registration** button near the bottom of the window. A confirmation message window is displayed.
- Click the **Print Confirmation** button if you would like to print a copy of the confirmation. Click **OK** to close the confirmation window.

You will receive an authorization code via e-mail that is needed to log on to MAT for the first time.

3. Filing a State Tax Return

Where do I start?

While logged into MAT, click the **Home** link to go to the summary page that you see when you first sign-in.

What do I do?

Step 1 – Navigate to the Relevant Period

- On the **Accounts** tab, click the **Account Type** link for the tax type you want to file.
- On a **Periods** tab, click the **Filing Period** link for the period you want to file.
- In the **I Want To** section, click the **File or View a Return** link.

Step 2 – Complete the Return

- Complete the fields and forms or schedules of the return as necessary.

Note: Field descriptions are color-coordinated to identify information about that field:

<u>Color</u>	<u>Meaning</u>	<u>Description</u>
Gray	Not editable	The field is displayed for informational purposes only.
White	Editable	The field is editable.
Orange	Required	You must enter a value in this field.
Red	Error	The field contains an incorrect or invalid value.

- Some returns have several forms or schedules. Click the form or schedule name at the top of the return to complete the information for that form or schedule.
 - If a line item name is displayed as a blue link, you can jump directly to that form or schedule through that link.
 - If any form or schedule contains an error or has a required field, a red dot will appear next to the name of that form or schedule. Click the form or schedule name to correct the error or provide the required information.
- At any point, you can:
 - Click the **Save and Finish Later** button to save your progress (this does not submit your return).
 - Click the **Cancel** button to close this window without saving any of your changes.

Step 3 – Submit the Return

- When you have completed the return, click the **Submit** button to file the return. (*Note: To approve submission of the return, MAT requires a password confirmation.*)
- A confirmation window will appear presenting the following options to proceed.
 - **Make Payment**
 - **File Without Payment**
 - **Print Confirmation Message**
 - **Print Return**

*Note: Not all return types can be printed. If the **Print Return** button is not displayed, then you cannot print the selected return type.*

4. Filing a Local Tax Return

While logged into MAT, click the **Home** link to go to the summary page that you see when you first sign-in.

What do I do?

Step 1 – Navigate to the Relevant Period

- On the **Accounts** tab, click the **Local Tax** account link for which you want to file a ONE SPOT return.
- On a **Periods** tab, click the **Filing Period** link for the period you want to file a return.
- In the **I Want To** section, click the **File or View a Return** link.

Step 2 – Complete the Return

- Click the **Return Table** button to begin filing the ONE SPOT return. You may choose to import a template containing the return information by clicking the **Import** button. Templates can be found at <https://revenue.alabama.gov/sales-use/one-spot/>.

Note: Field descriptions are color coordinated to identify information about that field:

<u>Color</u>	<u>Meaning</u>	<u>Description</u>
Gray	Not editable	The field is displayed for informational purposes only.
White	Editable	The field is editable.
Orange	Required	You must enter a value in this field.
Red	Error	The field contains an incorrect or invalid value.

- At any point, you can:
 - Click the **Save and Finish Later** button to save your progress (this does not submit your return).
 - Click the **Cancel** button to close this window without saving any of your changes.
- In the window that opens, fill out the return.
 - Select the Locality, Tax Type and Rate Type from the drop-down menus in the return. *Note: If the Locality is Non-State Administered, you will need to provide a Jurisdiction Account number.*
 - Enter the appropriate values in the **Gross Amount** and **Deductions** fields.
 - You may also import a return template by clicking the **Import** button.
- Each locality entered will be saved and included in the return for the next filing period. If you are filing a locality on a one-time only basis and do not wish it to be included in future filing periods, check the box in the **One-Time** row.
- Continue to fill out the ONE SPOT return. If you are filing for more than 5 localities, the return will create another page. Use the page numbers at the top of the return to jump between pages.
 - Locality columns may be copied or deleted using the **Copy Record** or **Delete this Record** links, respectively.
- Once the appropriate information is filled out on the return, click the **OK** button to close the return window.

Note: If you have filed for municipalities without adding their corresponding county, a message will appear with instructions regarding how to add the corresponding county to the return.
- A message next to the **Return Table** button indicates the status of the return and whether or not there are errors that need to be corrected before proceeding.
- Click the **Next** button.
- A summary page displays the amounts from each line of the return, broken down by either State or Non-State Administered Localities. Penalty, interest, and/or discount amounts are displayed as well.

*Note: The **Review Return Table** button will display a summary of the return, including tax rate, penalty, interest, and discount, broken down by each locality.*

- ADOR-approved credit may be entered on this summary page on the **Credit Claimed (ADOR-Approved)** line.

Step 3 – Submit the Return

- **If you are an EFT Debit Filer:**
 - Click the **Next** button.
 - A payment screen appears:
 - A payment for the Non-State Administered amount due is required to submit the return.
 - You may opt out of paying the amount due for State Administered Localities by checking the **Opt-out of Paying ADOR Amount Due** box.
 - Clicking on the **View Details** link will allow you to see a breakdown of the amount due by locality.
 - Enter the appropriate banking information for the return payment.
*Note: You may save this banking information for use on future filing periods by checking the **Save as Default Source** box.*
 - Click the **Submit** button to submit the return and payment. You will be required to enter your password to submit the request.
 - A confirmation window will appear. You will have different options regarding how to proceed.
 - **Print Confirmation Message**
 - **Print Return**
 - If you opt 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.
Note: Vouchers can only be printed if the amount due is less than \$750. Any amount due over \$750 must be paid electronically.
 - Pending return and payment requests can be withdrawn before 4:00 p.m. on the business day they were submitted or the next business day if the requests were submitted after 4:00 p.m.
- **If you are an ACH Credit Filer:**
 - Click the **Submit** button.
Note: No payment information is required to submit a return for ACH Credit Filers.
 - Pending return and payment requests can be withdrawn before 4:00 p.m. on the business day they were submitted or the next business day if the requests were submitted after 4:00 p.m.