

PALite Employer Online Filing System – Instructions to File LST

1- Select the proper Collector and enter your federal EIN.

2- Continue by entering the User Name and Password provided by the collector. With a single login account, you can file for multiple employers. Tell the collector which employers you support.

3- Click I Agree to continue.

4- On first login, you will be asked to provide an email address. While entry is optional, your email address will allow you to reset your own forgotten password. Click Update Email to move to Home page.

EMPLOYER HOME Page

Second Test Company
EIN: 123456789
Account: unspecified

EMPLOYER HOME

Use PALite.org to upload or type in the (LST). In addition to employee details, you can also upload or type in the (LST). In addition to employee details, you can also upload or type in the (LST).

Instructions For Use

- To file a weekly, monthly, or quarterly tax return (including details and/or payment), click the button below and follow the steps of the wizard.
- After filing payment or detail, use "View Return Status" link at left to see when your return has been Retrieved by the Collector. After a return is Processed by the Collector, the accept or reject status will be shown. Please allow 5 days after the payment effective date for a payment to be accepted or rejected. During high volume periods, allow several weeks for a retrieved employee detail return to be processed and listed with approved or rejected status.
- "View Filing History" to review all of your activity on PALite.

TAX FUNCTIONS
File A Tax Return
View Return Status
View Filing History

NAVIGATION
Home
Switch Account
Main PALite Site

OTHER OPTIONS
Change Password
Manage User(s)
Manage Account(s)

HELP
FAQ
How Do I...
e-Signature Agreement
Terms of Use

The menu at left lists all options. Account is "unspecified" until you select the employer account for which you are filing. "Switch account" option lets you pick another employer account to file.

Click "File a Tax Return" option or the "Begin a New Return" button to proceed with a tax filing.



Preferred Option

Choose one: Simple step-by-step instructions will appear on the next page. If you are filing your annual W-2s, please use the "File only EIT or LST employee withholding details" option below.

- File an EIT or LST employee detail return AND the required payment**
Using this option can save you time. You will first upload the details of withholdings from your employees, then supply your banking information to complete the return and payment at the same time.
- File EIT or LST payment only**
Select this option if you do not intend to supply employee details at this time. You might use this option if you are making a monthly payment, but plan to supply your details at the end of the quarter. If no taxes were withheld, use this option to file the required return; you will enter \$0 for Tax Withheld.
- File only EIT or LST employee withholding details**
Select this option to submit the details of withholdings from your employees. You may upload a file or key in the information. You may file your payment at another time. If filing your W-2 forms when you have made periodic payments throughout the year, use this option and choose "Annual" when asked for the frequency of your filing.

Preferred Option: File Both Employee Details AND Required Payment

Filing your employee detail and payment

1. Submit detail for your employees
2. Save your data to Excel (optional)
3. File the payment for your return
4. Print Your Receipt



After choosing your EIT or LST tax collection account, you will follow these steps:

Step 1 - Input Details to the Secure Server (Two Methods); Confirm Totals and Submit Details to the Tax Collector

- **UPLOAD A RETURN**, which consists of a file you've already prepared. Use either the [local Excel format specifications](#) or the [federal \(EFW2\) format](#).
OR
- **MANUALLY ENTER A RETURN** by typing in employee and withholding information.

Step 2 - Save a Copy of the Details to Excel (Optional)

Step 3 - Submit Bank Information for Payment Corresponding to the Details You've Provided

The system calculates the payment amount from the total withholdings you've entered, along with any penalty & interest for late filings. You will enter the bank name, routing number, and your checking or savings account number to make payment.

Step 4 - Print Your Payment Receipt with Confirmation Number

Click "Continue" and the wizard walks you through the steps.

File the LST Employee Withholding Details

SELECT TYPE OF EMPLOYEE DETAILS AND YOUR ENTRY METHOD

What type of tax are you filing?
LST - Local Services Tax

For what period are you filing details?
OR
If this is your EIT year-end filing, please choose "Annual".
Quarterly

Select the Tax Year:
2016

To which Quarter does the filing apply?
First

Select the Entry Method:
Upload Electronic File
Manual Entry

Did you select the wrong account? [Click here to select another account](#)

Specify LST and the Tax Year and Quarter you are filing. If filing for entire year, select "First" quarter. Choose your preferred method for entering the employee details.

Method 1: Upload an Excel file

UPLOAD YOUR RETURN

File Type: LST - Local Services Tax
Tax Year: 2016
Occurrence: Quarterly
Quarter: First

Step 1 - Prepare and save your employee withholding records in a file on your computer if you haven't already done so. Use the [Local Format Specifications](#) for an Excel file or the [federal \(EFW2\) format](#). Your file must include data for a single tax year.

Step 2 - Select the format of the file you want to upload.
Local Excel Format

Step 3 - Enter the full path of the file you would like to upload, or click the Browse button to select the file from your computer.
N:\development\ASPNET\TaxOnlineFiling\Documentation\TestFiles\LST-98764-2\ Browse...

Step 4 - Click the Upload File button. If any errors are found in the file, they will be displayed below.

Browse for the Excel file you've prepared for upload, then click "Upload File."

If file uploaded without error, and summary of records appears as expected, click "Submit" to alert collector that your details are available to process.

UPLOAD CONFIRMATION

Your file was uploaded successfully. Please confirm the following:

File uploaded: LST-98764-2016-1.xls
Number of Employees in return: 3
Total Tax Withheld: \$30.00

If the above details are correct, click on the 'Submit' button to indicate to the tax collector that the file is ready to process. If the above details are not correct, click on the 'Delete' button to remove this uploaded file from the system. Check and correct the file on your computer, then try the upload again.

Method 2: Manually Enter Employee Details

MANUALLY FILE YOUR RETURN

File Type: LST - Local Services Tax
Occurrence: Quarterly
Tax Year: 2016
Quarter: First

Enter information for one employee on each row. Entry is required in all fields marked with an asterisk.
[District Code \(PSD\) listing in PDF form](#)

SSN (NNN-NN-NNNN)	First Name (30 Characters)	Middle (30)	Last Name (30 Characters)	Work PSD (NNNNNN)	Address1 (30 Characters)	Address2 (30)	City (30 Characters)	State Code (AA)	Zip Code (NNNNN- NNNN)	Tax Withheld (NNN.NNN)
111616004	Don		Davis							
Employee Count: 3										Totals: \$39.00

Type data for up to 5 employees at a time. Review for accuracy, and then click "Save Entered Data."

Each time you Save Entered Data, names are added to the scroll list below, and the Employee Count and Totals are updated. Continue to add more employee rows as needed, and save each time you fill the screen.

Information has been saved for:

Last	First	MI
Adams	Arthur	A
Baker	Bethann	
Carter	Curt	C

When you have saved all employee data and agree with the Employee Count and Total Tax Withheld, click "Submit this return to the collector".

Create a Copy of Employee Details, if you wish

1. Submit detail for your employees
2. Save your data to Excel (optional)
3. File the payment for your return
4. Print Your Receipt



At this point, you have one opportunity to save a copy of the filing just submitted. You should save a copy:

- As a receipt

OR

- To use as the basis of your next filing. The employee names, addresses, and social security numbers just submitted will **not** be retained on this website for you to access next period. In particular, if you entered the employee detail manually, you are encouraged to save the employee detail return to an Excel file. Next period, you may use Microsoft Excel or the free OpenOffice Calc program to update the file with accurate wages/withholdings, which you then can simply upload to this website.

TO SAVE A COPY OF YOUR FILING:

1. Click the **Save to Excel** button below.
2. When prompted to Open or Save, click **Save**.
3. Browse to the folder where you wish to save your copy.
4. Leave the "Save as type" set to "Microsoft Excel Worksheet" to ensure compatibility between your system and the tax collector's.
5. Click Save.

[Save To Excel](#)

[Click Here To File Your Payment](#)

You have the option to save a copy of your filing to an Excel file before continuing to File Payment.

File LST Payment

When filing details and payment together, the system calculates the Number of Employees and Tax Withheld from the details. Penalty and Interest are calculated if the payment is late.

OR

You may have chosen to File LST Payment ONLY (for example, if making a required \$0 filing *when no tax was withheld*). Read the overview, then make selections and enter info as the wizard walks you through 4 steps of the Payment.

1. Submit detail for your employ
2. Save your data to Excel (optional)
3. File the payment for your return
4. Print Your Receipt



Number of Employees Reported:
 Tax Withheld from Employees:
 Penalty Due:
 Interest Due:

[Click here to continue](#)

PAYMENT RETURN (1 OF 4)
Step 1 - Select the Tax Type, Payment Occurrence, Tax Year and Quarter you are filing for.

Second Test Company
 EIN: 123456789
 Account: main Acct - both EIT & LST (000098764)

What type of tax are you filing?

What is the frequency of your payment?

Select the Tax Year:

To which Quarter does

Did you select the wrong

[Go to Employer Home](#) [Continue](#)

Enter requested info. Effective Date can be up to 5 days in the future.

PAYMENT RETURN (3 OF 4)
Step 3 - Choose payment method.

No Payment is Due
 Pay Directly Online via ACH from Checking or Savings

ACH Payment Info

Account Type:
 Bank Name:
 Routing #:
 Account #:
 Retype Account #:
 Effective Date:

[Previous Step](#) [Continue](#)

- If you intend to file online in the future, you can indicate that paper forms are no longer needed.
- Also, you decide whether to save your ACH bank data on the PALite server for your next filing.

PAYMENT RETURN (2 OF 4)
Step 2 - Enter payment details.

Number of Employees Reported:
 Tax Withheld from Employees:
 Penalty Due:
 Interest Due:

[Previous Step](#) [Continue](#)

PAYMENT RETURN (4 OF 4)
Step 4 - Confirm payment details and submit payment to collector.

Tax Type: Local Services Tax
 Tax Year: 2016
 Quarter: 1
 Tax Withheld: \$39.00
 Penalty Due: \$3.90
 Interest Due: \$1.27
 Total Payment Amount: \$44.17

Payment Method: ACH
 ACH Account Type: Checking
 ACH Bank Name: MY FCU
 ACH Routing #: 231382267
 ACH Account #: 11111111
 ACH Effective Date: 11/16/2016

Continue To Mail Payment Coupons?
 Do Not Mail Future Payment Coupons To Me
 Please Continue To Mail Payment Coupons To Me

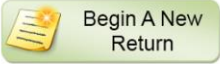
Save Payment Information For Future Payments FOR THIS COLLECTOR ACCOUNT #?
 Save This Payment Information
 Do Not Save This Payment Information

[Previous Step](#) [Submit Payment](#)

Click "Submit Payment" on the last payment step.

File Employee Withholding Details Only – Payment Will Be Made by Check

On Home page, click



then

File only EIT or LST employee withholding details

Select this option to submit the details of withholdings from your employees. You may upload a file or key in the information. You may file your payment at another time. If filing your W-2 forms when you have made periodic payments throughout the year, use this option and choose "Annual" when asked for the frequency of your filing.

After reviewing the instructions in the wizard intro, choose the employer account you are filing:

WIZARD INTRO - EMPLOYEE DETAILS ONLY

- Employee Detail may be filed online for Earned Income Tax (EIT) or the Local Services Tax (LST). After choosing your tax collection account, you will follow these steps:

Step 1 - Create an Employee Detail Return on the Secure Server (Two Methods)

- UPLOAD A RETURN, which consists of a file you've already prepared. Use either the [local Excel format specifications](#) or the [fed \(EFW2\) format](#). Note that beginning in Tax Year 2012, Work PSD may be a required field in EIT filings for multi-location employee OR
- MANUALLY ENTER A RETURN by typing in employee and withholding information. You may complete a "return in progress" at date.

Step 2 - Submit Your Return to the Tax Collector

- You will see a summary of the data in your uploaded or manually entered return. If you agree with the summary, SUBMIT the ret the tax collector to process. Otherwise, delete the return and start again at step 1.

Step 3 - Check the Status of Your Return

- You can use the "View Return Status" link on the Home page to ensure that your return has been submitted, or to withdraw a re before the collector retrieves it.

PLEASE CHOOSE ACCOUNT BY CLICKING SELECT BUTTON BESIDE DESIRED ACCOUNT #

IF YOU ARE A TAX PREPARER OR PAYROLL PROCESSOR:
If you wish to MANUALLY ENTER an employee detail return for **ONE** of your clients, then select that specific Collector Account listed below. Otherwise select an account below -OR- click this "Multiple Account Filing" button which permits you to UPLOAD A FILE containing data for MULTIPLE Collector Accounts.

To Filter Your Account Listing:

Account Name: EIN:

Helpful Hint: Press CTRL+F to find a name in the list below without the need to filter your account listing.

Select	Collector Account #	Name	Address	Notes	EIT	LST	EIN
<input type="button" value="Select"/>	676541202	Biggest Employer	156 n. geo st	this acct EIT only	<input checked="" type="checkbox"/>	<input type="checkbox"/>	676541202
<input type="button" value="Select"/>	0676541202	Company AAA LST Acct			<input type="checkbox"/>	<input checked="" type="checkbox"/>	676541233
<input type="button" value="Select"/>	0676541202	Employer BBB LST acct			<input type="checkbox"/>	<input checked="" type="checkbox"/>	676541233
<input type="button" value="Select"/>	676541201	Big Employer			<input checked="" type="checkbox"/>	<input type="checkbox"/>	676541201

A tax preparer who files for many employers would Select the proper employer's account for the current filing.

Indicate Type and Method of Filing

SELECT TYPE OF EMPLOYEE DETAILS AND YOUR ENTRY METHOD

What type of tax are you filing?

For what period are you filing details?
 OR
 If this is your EIT year-end filing, please choose "Annual".

Select the Tax Year:

To which Quarter does the filing apply?

Select the Entry Method:

Did you select the wrong account? [Click here to select](#)

UPLOAD YOUR RETURN

File Type: LST - Local Services Tax
Tax Year: 2016
Occurrence: Quarterly
Quarter: First

Step 1 - Prepare and save your employee withholding records in a file on your computer if you haven't already done so. Use the [Local Format Specifications](#) for an Excel file or the [federal \(EFW2\) format](#). Your file must include data for a single tax year.

Step 2 - Select the format of the file you want to upload.

Step 3 - Enter the full path of the file you would like to upload, or click the Browse button to select the file from your computer.

Step 4 - Click the Upload File button. If any errors are found in the file, they will be displayed below.

UPLOAD CONFIRMATION

Your file was uploaded successfully. Please confirm the following.
 File uploaded: LST-98764-2016-1.xls
 Number of Employees in return: 3
Total Tax Withheld: \$30.00

If the above details are correct, click on the "Submit" button to indicate to the tax collector that the file is ready to process. If the above details are not correct, click on the "Delete" button to remove this uploaded file from the system. Check and correct the file on your computer, then try the upload again.

Confirm that the figures from the uploaded details match your expectations, then be sure to "Submit" the filing so the collector knows it is available to process.

RETURN SUBMITTED

Your Return Has Been Submitted.

At this point, you have one opportunity to save a copy of the filing just submitted. You should save a copy:

- As a receipt
- OR
- To use as the basis of your next filing. The employee names, addresses, and social security numbers just submitted will not be retained on this website for you to access next period. In particular, if you entered the employee detail manually, you are encouraged to save the employee detail return to an Excel file. Next period, you may use Microsoft Excel or the free OpenOffice Calc program to update the file with accurate wages/withholdings, which you then can simply upload to this website.

TO SAVE A COPY OF YOUR FILING:

- Click the **Save to Excel** button below.
- When prompted to Open or Save, click **Save**.
- Browse to the folder where you wish to save your copy.
- Leave the "Save as type" set to "Microsoft Excel Worksheet" to ensure compatibility between your system and the tax collector's.
- Click **Save**.

Remember to Check the Status of Your Return. You should use VIEW RETURN STATUS after 2-4 business days to see if your return has been retrieved by the collector. During high volume periods, it may take several weeks for employee details to be processed by the collector and listed with "accepted" or "rejected" during processing.

Employee Detail filing is complete when you see the RETURN SUBMITTED screen. You can save a copy of the submitted details to an Excel workbook as your "receipt".

From the Employer Home page, you can use the [View Return Status](#) link to check the status of your filing or to view the Confirmation Number and other information about your filing.

Payment can be made online at a later date via ACH transfer. Or, please mail check with employer coupon.

View Return Status

For status info, login anytime. On the EMPLOYER HOME page, click "View Return Status" and check this page.

VIEW RETURN STATUS

Filter Your Display:

Date Range: Tax Type: Status: User:

#	Tax	Type	Status	Period	Account (s)	Amount	Created	User		
1117	LST	Detail	Not Yet Submitted To Tax Collector	2012-1	0000098764	\$13.00	02/06/2012	agraf	Delete	Submit
1116	EIT	Detail	Submitted To Tax Collector	2011-3	0000098764	\$3,431.84	02/03/2012	agraf	Delete	
1114	EIT	Detail	Retrieved By Tax Collector	2011-4	0000098764					
1098	EIT	Payment	Submitted To Tax Collector	2011-4	0000098763					
1097	LST	Payment	Submitted To Tax Collector	2011-4	0000098764					
1096	EIT	Payment	Submitted To Tax Collector	2011-4	0000098763	\$500.00	01/16/2012	agraf	Delete	
1095	LST	Detail	Retrieved By Tax Collector	2012-1	0000098764	\$39.00	01/16/2012	agraf		
1094	EIT	Detail	Retrieved By Tax Collector	2010-4	0000098763	\$4,793.15	01/16/2012	agraf		
1093	EIT	Detail	Retrieved By Tax Collector	2010-3	0000098763					
1084	EIT	Detail	Retrieved By Tax Collector	2012	0000098764					
1083	LST	Detail	Retrieved By Tax Collector	2011-1	0000098764					
1082	EIT	Detail	Retrieved By Tax Collector	2010-1	0000098763					
1078	EIT	Detail	Retrieved By Tax Collector	2011-4	0000098764					
1074	LST	Payment	Submitted To Tax Collector	2011-2	0000098764	\$27.96	11/22/2011	agraf	Delete	
1072	EIT	Detail	Retrieved By Tax Collector	2011-2	0000098763	\$1,000.00	11/22/2011	Cathy		
1071	EIT	Detail	Retrieved By Tax Collector	2011-1	0000098764					
1069	EIT	Payment	Submitted To Tax Collector	2011-1	0000098764					
1069	EIT	Detail	Retrieved By Tax Collector	2011-4	0000098764					
1069	EIT	Payment	Submitted To Tax Collector	2011-4	0000098764					
1063	EIT	Detail	Processed - Rejected By Tax Collector - apparent duplicate							

Be sure to Submit uploaded files or manually entered returns to complete your filing. Or, delete inaccurate returns that you don't want to submit to the collector.

The collector is notified that your return is available online.

The collector has downloaded your return from the secure server and will load it into their in-house system.

The collector has finished processing your return and indicates whether it was accepted or rejected. Rejected returns must be redone and submitted again.

View Filing History

VIEW FILING HISTORY

Filter Your Display:

Date Range: Tax Type:

This screen will show a history of all activity conducted in the online filing system, including:

- submitted returns that completed the full cycle of processing by the collector
- returns that you uploaded or started to type, but then deleted without submitting
- inactive returns not submitted within 48 hours of their creation
- failed upload attempts

#	Tax	Type	Status	Period	Account (s)	Amount	Created	User		
1117	LST	Detail	Not Yet Submitted To Tax Collector	2012-1	0000098764	\$13.00	02/06/2012	agraf	Delete	Submit
1116	EIT	Detail	Submitted To Tax Collector	2011-3	0000098764	\$3,431.84	02/03/2012	agraf	Delete	
1114	EIT	Detail	Retrieved By Tax Collector	2011-4	0000098764	\$15.00	02/02/2012	agraf		
1098	EIT	Payment	Submitted To Tax Collector	2011-4	0000098763	\$15.00	01/18/2012	agraf	Delete	
1097	LST	Payment	Submitted To Tax Collector	2011-4	0000098764	\$10,000.00	01/18/2012	agraf	Delete	
1096	EIT	Payment	Submitted To Tax Collector	2011-4	0000098763	\$500.00	01/16/2012	agraf	Delete	
1095	LST	Detail	Retrieved By Tax Collector	2012-1	0000098764	\$39.00	01/16/2012	agraf		
1094	EIT	Detail	Retrieved By Tax Collector	2010-4	0000098763	\$4,793.15	01/16/2012	agraf		
1093	EIT	Detail	Retrieved By Tax Collector	2010-3	0000098763	\$4,793.15	01/16/2012	agraf		
1084	EIT	Detail	Retrieved By Tax Collector	2012	0000098764	\$88.00	01/13/2012	agraf		
1083	LST	Detail	Retrieved By Tax Collector	2011-1	0000098764	\$143.00	12/16/2011	agraf		
1082	EIT	Detail	Retrieved By Tax Collector	2010-1	0000098763	\$5,300.00	12/16/2011	agraf		
1080	LST	Detail	Deleted Due To Inactivity	2009-1	0000098764	\$1,391.00	12/15/2011	agraf		
1078	EIT	Detail	Retrieved By Tax Collector	2011-4	0000098764	\$4,759.53	12/15/2011	agraf		
1074	LST	Payment	Submitted To Tax Collector	2011-2	0000098764	\$27.96	11/22/2011	agraf	Delete	
1073	LST	Detail	Deleted Due To Inactivity	2011-2	0000098764	\$34.00	11/22/2011	Cathy		
1072	EIT	Detail	Retrieved By Tax Collector	2011-2	0000098763	\$1,000.00	11/22/2011	Cathy		
1071	EIT	Detail	Retrieved By Tax Collector	2011-1	0000098764	\$4,793.15	11/22/2011	Cathy		
1071	EIT	Payment	Submitted To Tax Collector	2011-1	0000098764	\$5,114.40	11/22/2011	Cathy	Delete	
1069	EIT	Detail	Retrieved By Tax Collector	2011-4	0000098764	\$2,100.00	11/22/2011	Cathy		
1069	EIT	Payment	Submitted To Tax Collector	2011-4	0000098764	\$2,100.00	11/22/2011	Cathy	Delete	
1067	EIT	Detail	Retrieved By Tax Collector	2011-2	0000098764	\$100.00	11/22/2011	agraf		
1063	EIT	Detail	Processed - Rejected By Tax Collector - apparent duplicate	2009-4	0000098764	\$11,880.00	11/16/2011	agraf		
1057	EIT	Detail	Retrieved By Tax Collector	2010-4	0000098764	\$66,123.60	11/15/2011	agraf		