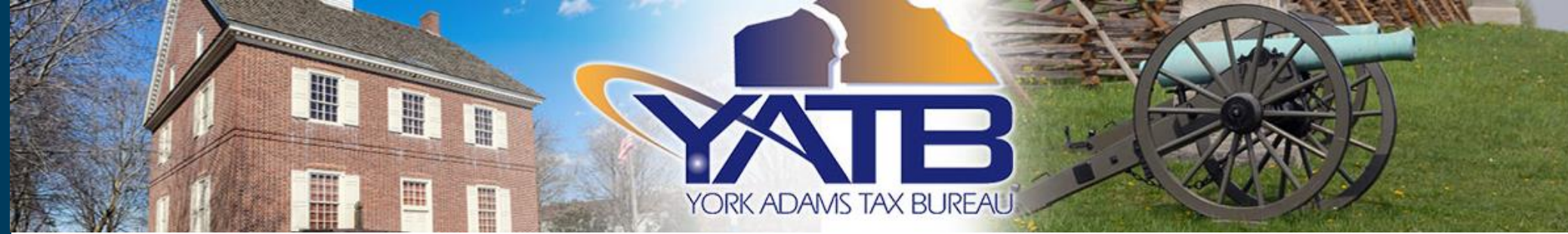


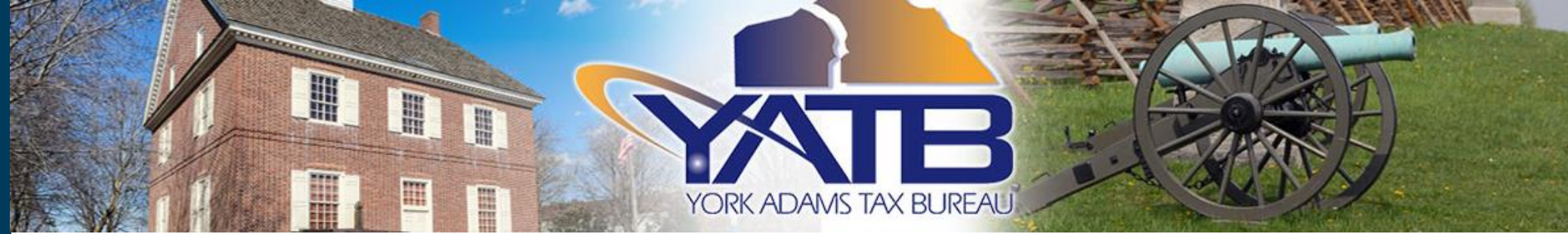
Using PDFs to file your taxpayer's returns with the York Adams Tax Bureau

We'll get started about 10am



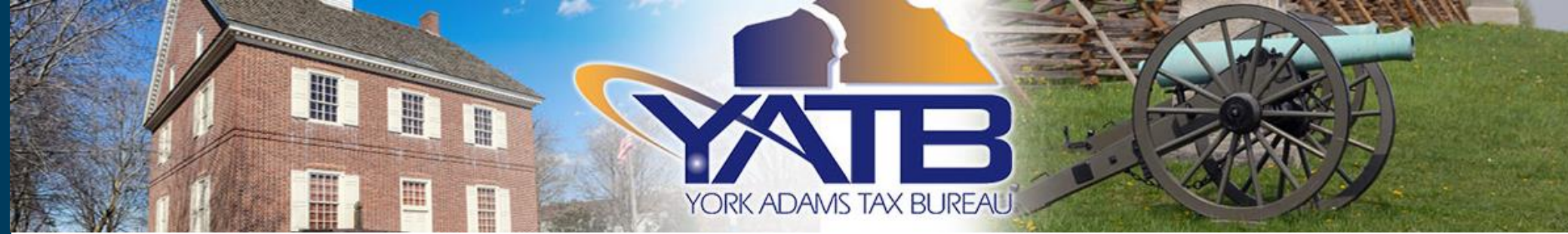
Using PDFs to file your taxpayer's returns with the York Adams Tax Bureau

Welcome!!



A FEW QUICK GROUND RULES

- Please post any questions to the chat window. We'll look in on that and answer those questions during or after the presentation.
- You can also use the “Raise your hand” feature to be recognized. We'll unmute your mike for your question or comment.



What's this all about?

- The Bureau is always looking for ways to improve processing of the vast amounts of detail we receive on an annual basis.
- We're also looking to make our preparer partners' work easier and more efficient.
- Using new technologies that The Bureau has added over the past few years, we can now process PDF files produced electronically.
- PDF files are the most widely used document standard which makes this a great place to start.
- Most preparer applications (Intuit Proseries, Xero, Drake, etc.) already produce the Pennsylvania generic final return.



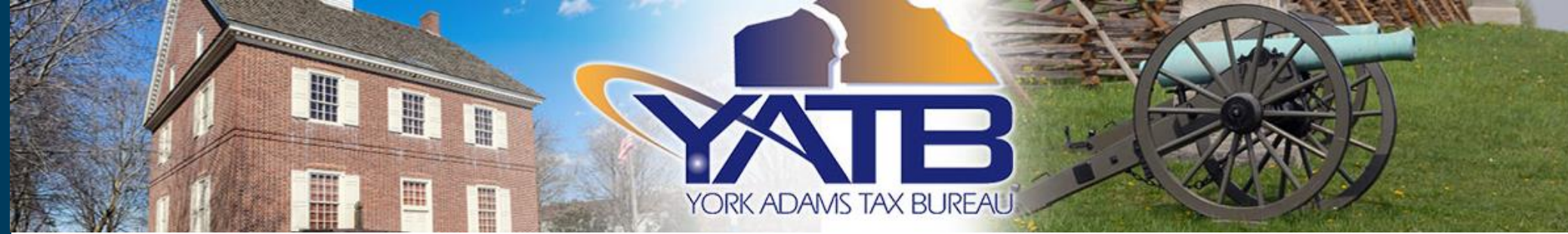
When will this be available?

Right now!



How does this work?

1. You need to get registered with YATB to send PDFs for processing. We'll have a link for you at the end of this deck.
2. You'll be assigned a login to a third-party file sharing service, "ShareFile".
3. You or your office will complete your clients' taxes and use your software to prepare Pennsylvania's generic final return and save to a PDF with all of the backup information.
 - W2's, schedules, anything else used in computing their return.
 - The file must place the PA generic final return first, with all supporting documentation following.



How does this work? (part 2)

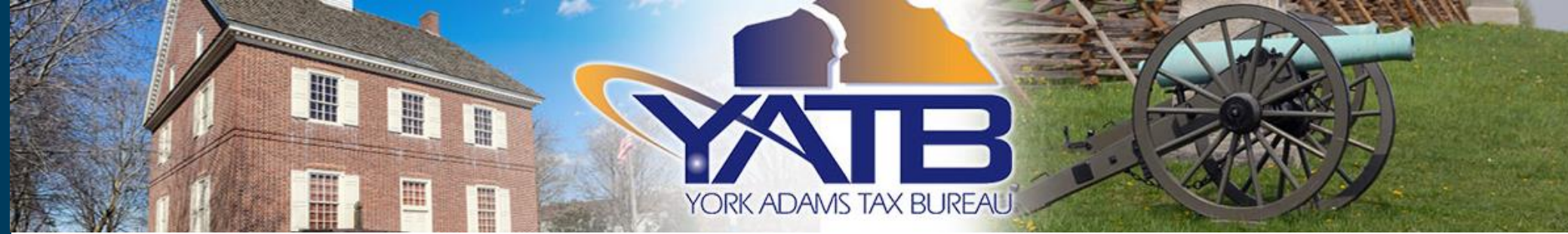
4. Your office will collect all the PDFs that you want to submit to YATB for some period of time.
 - This time period is up to you. If you're doing lots of returns, a batch of returns every day may be the right idea. For a lower volume, you may want to submit every few days or weekly.
5. You'll log onto the "ShareFile" system and upload your files.
6. YATB will receive the files and confirm they're all usable.
 - Could take a few days considering weekends and holidays.
7. You will then receive an email confirmation of their receipt, and of any issues that were found in your submissions.
8. **If a balance is due, you or your client send their payment to YATB.** This process does NOT include processing payments.



Reminder

You or your taxpayer must send any balance due payment to YATB directly.

The individual payment voucher is on the “For Preparers” page on the YATB web site or...
<https://www.yatb.com/wp-content/docs/Voucher-for-Preparers-fillable-2023.pdf>



Important details about your PDFs

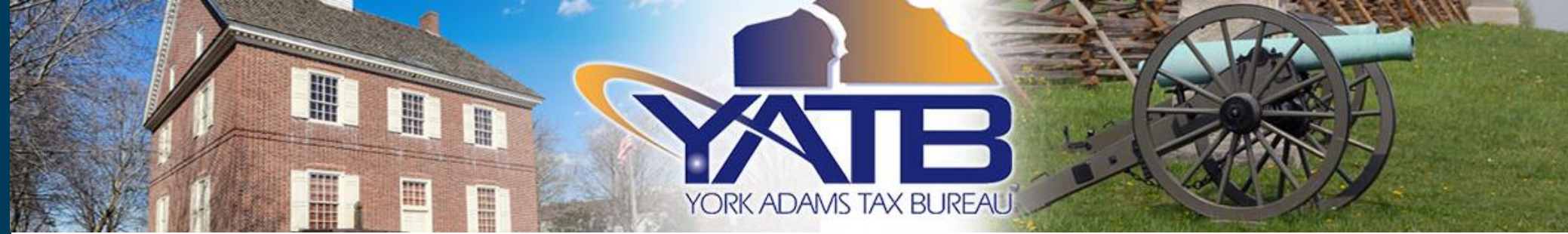
1. You must ensure that your clients' data is protected at all times.
2. PDFs generated by your system must include:
 - a. Facsimile of Pennsylvania's "Generic" EIT Final Return or similar.
 - b. Supporting documentation such as W2s, military orders, schedules, etc.
3. You must maintain client-signed copies of the final returns for a minimum of five (5) years and produce copies to The Bureau if requested.
4. You must ensure that ShareFile account information given to you by YATB is protected at all times.
5. Your staff will upload only PDF files created by your professional preparer's software.
6. You will review failure notices and address any issues noted. Contact our support team at pdfsupport@yatb.com with questions or issues. Successfully received files will be deleted from your upload folder.



Building your PDF

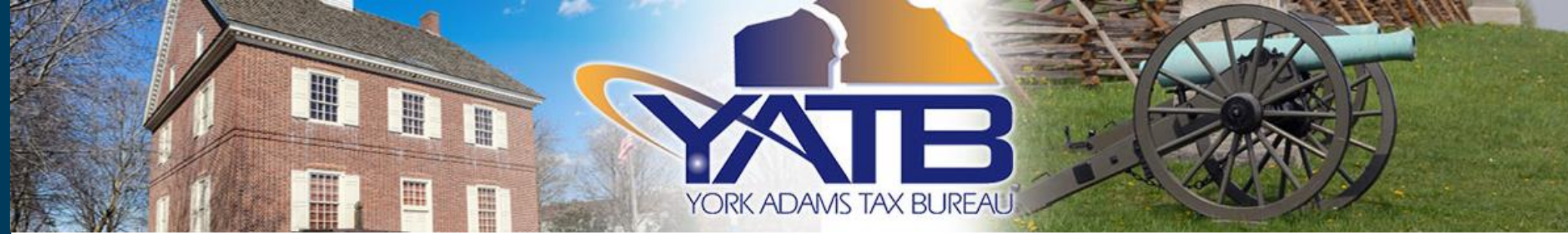
You are responsible for sending the PDF file in the format required for the process. Your preparer's software may be able to create this file in the required format for you. Files will be rejected if they're not sent properly.

- **FIRST PAGE MUST** be the PA generic individual final return format or similar.
- If your taxpayer is using W2s in their filing, the next page(s) must be the W2's provided by the taxpayer or generated by your software.
- Following pages can be additional information such as schedules or other documentation that may be pertinent to the filing.



Walk-Thru

Completing the upload process



Important Reminders

1. You must be pre-registered to use this process.
 - Go to the YATB Web Site (<https://www.yatb.com>) and look for the “Preparers” tab and “Preparers Filing PDFs” to register and be confirmed for this service. Individual taxpayers will not be authorized for this service.
2. ShareFile is a third-party service. YATB can provide some guidance in its’ use, but it may experience technical issues that are out of our control.
3. YATB does intend to, in the coming year, move these operations into the PALITE family of services and retire the use of ShareFile. More information about this will come at a later date.



One more thing...

We're saying goodbye to an old friend.

The original version of Online Individual Filing ("OIF") premiered in 2011 and is being retired in November 2024. 2023 filings will be accepted until November 1st. The application will be shut down after that point.

The newer OIF is built for modern browsers and provides additional security for critical tax information.

The screenshot shows the PALite web interface. At the top, it says 'PALite PENNSYLVANIA'S LOCAL INCOME TAX EXCHANGE' and 'Pennsylvania's Most Complete Local Taxes E-Filing System'. Below this is a navigation bar with 'Logout | Settings | Main Menu'. The main content area is titled 'Main Menu' and contains two large purple buttons: 'I am ready to file a New Local Tax Return' and 'Tell me what I need to start filing'. Below the buttons is a table with columns for 'Tax Year', 'Name', 'Address', 'Last Modified', and 'Status'. The table lists two entries for 2023 and 2022, both with a status of 'Collector acknowledged receipt of return' and a 'Print' button. A footer at the bottom contains copyright information and links to 'Terms and Conditions | Privacy Policy | PALite Portal Site'.



What's next?

Get registered!!

Scan the QR code here to complete the registration process for this new filing option.

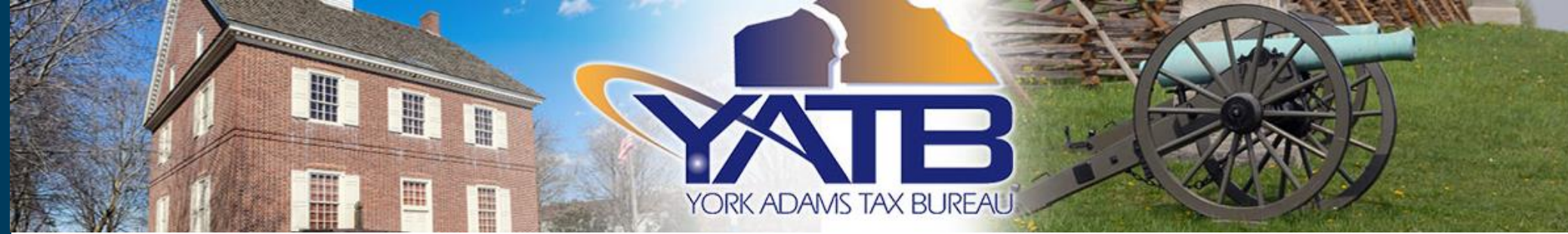
-or-

Visit <https://www.yatb.com/for-tax-preparers> and follow the link there to the register for this new filing option.

After your registration is processed, you'll be contacted with login information for ShareFile. You can then begin uploading PDFs at your convenience.

York Adams Tax Bureau - Preparer
Registration

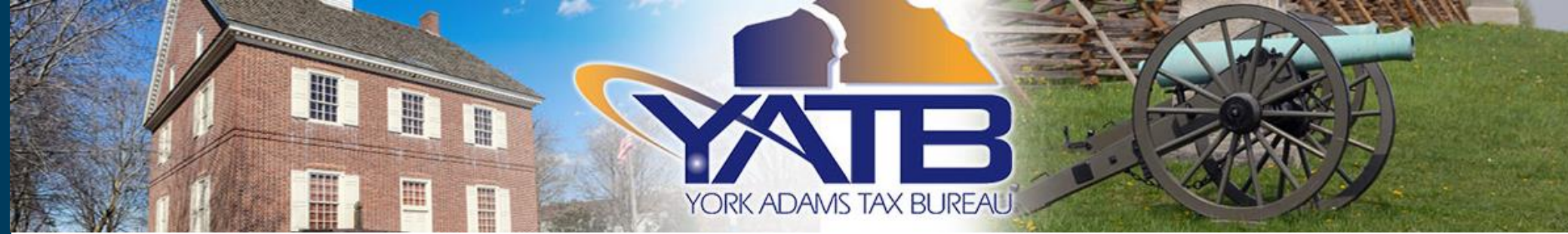




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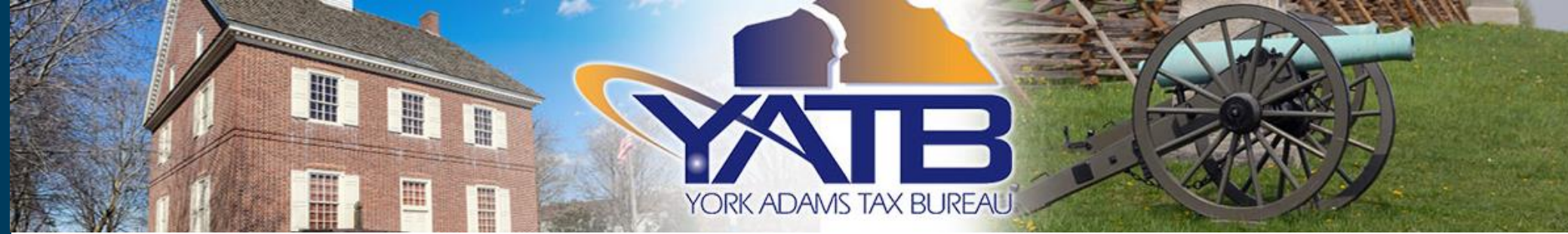
York Adams Tax Bureau will NOT
be mailing 2024 tax forms

Filers should use PALITE or download the
fillable PDF form from the web site



Questions?
Comments?





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Thanks for joining us and for
sharing your valuable time!