#### How to Make Online Tax Payments with Your Checking/Savings <u>Account</u>

Please note that these instructions for paying online with a checking/savings account, which is free of charge. You are able to pay using a debit/credit card for a fee. You can find this information on the <u>IRS</u> or <u>Oregon</u> websites.

#### How to Pay the IRS Online

<u>Click here to go to the IRS payment system.</u> You do not need to create an account or log in to pay!

If filing jointly with your spouse, please enter the information for the person listed first on the return.

Note that this is for personal tax payments. If you own a business and are filing as a sole proprietor or single-member LLC your Federal tax payments are still considered personal tax payments.

Select Make a Payment:

## Pay personal taxes from your bank account





#### You want the next screen to look like this. Make sure you select the appropriate tax

# You will then be asked to Verify your Identity based on a prior year's returns. Please do not use the year we are filing to verify.

All fields with \* are required.

#### **Verify Identity**

Direct Pay verifies your identity using information from your 1040 filing history. Please provide the following information from a 1040 tax return you filed for one of the years listed in the Tax Year for Verification drop down menu.

Note: the Tax Year for Verification you enter here does not have to match the tax year for your payment.

Tax Year for Verification *	?	
2023	•	

You chose 2023 as your tax year for verification. Enter information from your 2023 1040 tax return in the fields below.

The information you enter must match the information from your tax return for the tax year you selected above.

Filing Status *	?
Single	•
First Name *	

	_	_		_	
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I	ах	

#### Last Name \*

Payer

#### Enter your payment amount and bank account information on the next screen. Click Next to submit.

Please enter and confirm the payment amount below.

Select a date for your payment to be processed. The payment date selected is the date you will ge credit for the payment although the payment may settle on a future date.

Payment Amount (example: 12345.00)

\$1.00

**Confirm Payment Amount** 

\$1.00

Payment Date (within 365 days)	?	
01-11-2023		

### **Your Bank Account Information**

Routing Number (example: 123456789)

Account Number

	DATE	102	5
PAY TO THE ORDER OF		\$	
		DOLLARS	12
1			i
MEMO	 		ł
	 00000	0000 <b>"</b> "	

#### How to Pay Oregon Online

<u>Click here to go to the Oregon payment system.</u> You do not need to create an account or log in to pay! Click on the Make a Payment link.



#### Select the Pay now with checking or savings option.

#### đ

#### Pay now with checking or savings

This option allows you to make an electronic funds transfer (EFT) from your checking or savings accounts. The department will initiate a transaction with your financial institution to withdraw the funds from your bank account. There is no fee for this service.

To use this service, you must have received correspondence from us or filed a return in Oregon. This allows us to verify your identity before processing your payment.

Select Individual. If filing jointly with your spouse, please enter the information for the person listed first on the return.

Note that this is for personal tax payments. If you own a business and are filing as a sole proprietor or single-member LLC your Oregon tax payments are still considered personal tax payments.

Am I a Business ⑦ or an Individual?	Individual 🗸	
Id Type	Social Security Number (SSN) 🗸	
SSN	***-**-5555	
Legal Last Name	PAYER	
Phone Number	(503) 555-5555	
Email	TAX-PAYER@EMAIL.COM	
Verify Email	TAX-PAYER@EMAIL.COM	
	Payment is for Other Agency Account	debt

#### The next screen will ask if you have a payment voucher with a media number. Select No.



## You want the next screen to look like this. Make sure you select the appropriate tax year.

#### **Account Information**

Please provide proper account information to help direct the payment correctly.

The **account type** is the tax program you are attempting to pay.

Account Type	Personal Income Tax	/
Payment Type	Return Payment	-
	Payment applied to a return that you filed.	
Filing Frequency	Annual - Has a requirement to file	1
The <b>tax year</b> will direct the p	payment to the appropriate tax debt wit	hin our system.
Tax Year	2024	

# Enter your payment amount and bank account information on the next screen and click Next to submit.

Payment Channel	Payment
<sub>Type</sub> Direct Debit - Domestic Bank	Apply to tax due from return, or extension payment (if applicable).
Routing Number *	Period 31-Dec-2024
Account Number	Payment Date 24-Jan-2025
Confirm Account Number * Required	Payment Amount 5.00
Bank Account Type Checking - Business	Confirm Amount 5.00
<ul> <li>Checking - Personal</li> <li>Savings - Business</li> </ul>	
Savings - Personal	
lated to allow the Oregon Deortment of Revenue 1	to process payments from your account. Our incoming company
-	< Previous Next >

#### How to Pay Trimet Online

#### (Note that this is very similar to paying Oregon online)

<u>Click here to go to the Oregon payment system.</u> You do not need to create an account or log in to pay!

If you are filing jointly with your spouse, please use the information for the business owner.

#### Click on the Make a Payment link.



#### Select the Pay now with checking or savings option.



checking or savings accounts. The department will initiate a transaction with your financial institution to withdraw the funds from your bank account. There is no fee for this service.

To use this service, you must have received correspondence from us or filed a return in Oregon. This allows us to verify your identity before processing your payment.

## Enter your personal information. This is most likely going to be your social security number or ITIN, not your FEIN.

Am I a Business ⑦ or an Individual?	Individual ~
Id Type	Social Security Number (SSN)
SSN	***_**-55555
Legal Last Name	PAYER
Phone Number	(503) 555-5555
Email	TAX-PAYER@EMAIL.COM
Verify Email	TAX-PAYER@EMAIL.COM
	Payment is for Other Agency Account debt

# The next screen will ask if you have a payment voucher with a media number. Select No.



## You want the next screen to look like this. Make sure you select the appropriate tax

#### year.

Account Informati	on	
Please provide proper accou	int information to help direct the payn	nent correctly.
The <b>account type</b> is the tax	program you are attempting to pay.	
Account Type	TriMet Self-employment Tax	×
Payment Type	Return Payment	<u>•</u>
	Payment applied to a return that you filed.	
Filing Frequency	Annual - Has a requirement to file	×
The <b>tax year</b> will direct the p	payment to the apprøpriate tax debt w	ithin our system.
Tax Year	2024	

Enter your payment amount and bank account information on the next screen and click Next to submit. Note that, unlike the Federal and State payments, this is a business payment and can be counted as a business expense for next year.

Type	Apply to tax due from return, or extension payment (if
Direct Debit - Domestic Bank	applicable).
* Routing Number	Period
Required	31-Dec-2024
*	Payment Date
Reauired	24-Jan-2025
*	Payment Amount
Contirm Account Number	5.00
Rank Account Turne	Confirm Amount
Checking - Business	5.00
Checking - Personal	
O Savings - Business	
Savings - Personal	

#### How to Pay Portland/Multnomah County Business Tax Online

#### Click here to go to the Portland/Multnomah payment system.

You do not need to create an account or log in to pay! Click on the Business option. Note that, unlike the Federal and State payments, this is a business payment and filed as a business. It can be counted as a business expense for next year.

#### About You



You will then be asked if you are a Sole Proprietorship. Choose YES if you do not have an FEIN. Choose NO if you are registered as a Single-Member LLC and have an EIN.

#### Sole Proprietorship



#### Select Return Tax on the next screen.



#### Select Portland/MultCo Business Tax.

#### Account Type

Select the account type for which you would like to make a payment.

Account Type	
Portland/MultCo Business Tax	~

# You will then be asked to enter your ID. If you previously selected that you are a sole proprietor you will enter your social security number. If you previously selected single-member LLC you will enter your FEIN.

Taxpayer ID	Taxpayer ID
Enter the taxpayer ID of the business for which you would like to make a payment.	Enter the taxpayer ID of the business for which you would like to make a payment.
Digue	D T He
SSN - Social Security Number 🔹	FEIN - Federal Employer ID
Social Security Number *	* Federal Employe <del>r 10</del>
Required	Required
Confirm Social Security Number	Confirm Federal Employer ID
Show Social Security Number	Show Federal Employer ID

#### Select Standard Payment.

#### **Return Payment Type**

What type of return payment would you like to make?

## Standard Payment Pay my annual tax liabilities.

- Quarterly Estimated Payment
   Pay my quarterly estimated tax liabilities.
- Extension Payment
   File for an extension to the filing deadline of my taxes.

#### Select the Filing Period.

Filing Period	
Select the filing period for which you filed (or will file) a	return.
Filing Period	
Tax Year End Dec-2024	/
Tax Year End Dec-2024	1

O I don't know my filing period.

#### Enter your contact information on the next screen. Enter your payment information on the next screen.

#### How to Pay Portland/Metro Personal Tax Online This is for the Preschool For All Tax and Supportive Housing Services Tax.

<u>Click here to go to the Portland/Multnomah payment system.</u>

#### You do not need to create an account or log in to pay!

Select Individual.



#### Select Return Tax on the next screen.

#### Payment Type

What would you like to pay?

#### Return Tax

Select the filing period for which I am making a return payment, a quarterly estimated payment, or an extension payment.

#### 🔿 Bill

Enter my voucher ID to pay a bill I received.

Other

None of the other options apply to me.

#### Select which tax you would like to pay. (Arts Tax, Metro Supportive Housing Services, or MultCo Preschool for All)

## Account Type

Select the account type for which you would like to make a payment.

Account Type

Metro Supportive Housing Personal Tax

# Enter your social security number on the next screen. If filing jointly with your spouse, please enter the information for the person listed first on the return.

#### Select Standard Payment.

#### **Return Payment Type**

What type of return payment would you like to make?

$oldsymbol{O}$	Standard Payment	
	Pay my annual tax liabilities.	

Quarterly Estimated Payment
 Pay my quarterly estimated tax liabilities.

Extension Payment
 File for an extension to the filing deadline of my taxes.

#### **Select Filing Period.**

#### Filing Period Select the filing period for which you filed (or will file) a return.

Filing Period	
Tax Year End Dec-2024	~

I don't know my filing period.

#### Enter your contact information on the next screen.

Enter your payment information on the next screen.

Repeat for any additional Portland/Metro taxes that you are responsible for.