



## CITIZEN ACCESS INSTRUCTIONS

The following instructions are provided to aid taxpayers with the secure online filing and payment portal provided by the City of Loveland. These instructions cover the following topics:

- [HOW TO REGISTER FOR ONLINE FILING](#)
- [HOW TO LINK A TAX ACCOUNT](#)
- [HOW TO FILE & PAY](#)

Additionally, by utilizing the side menu options displayed below, the secure online filing portal can be used to:

- Review and print previously filed returns
- Print a copy of a license using the "License Information" menu option
- Apply for a new license
- Renew a license
- Pay outstanding balances using the "Outstanding Balances" menu option



### Welcome to Tax & Licensing

Please select an option from the menu on the left.

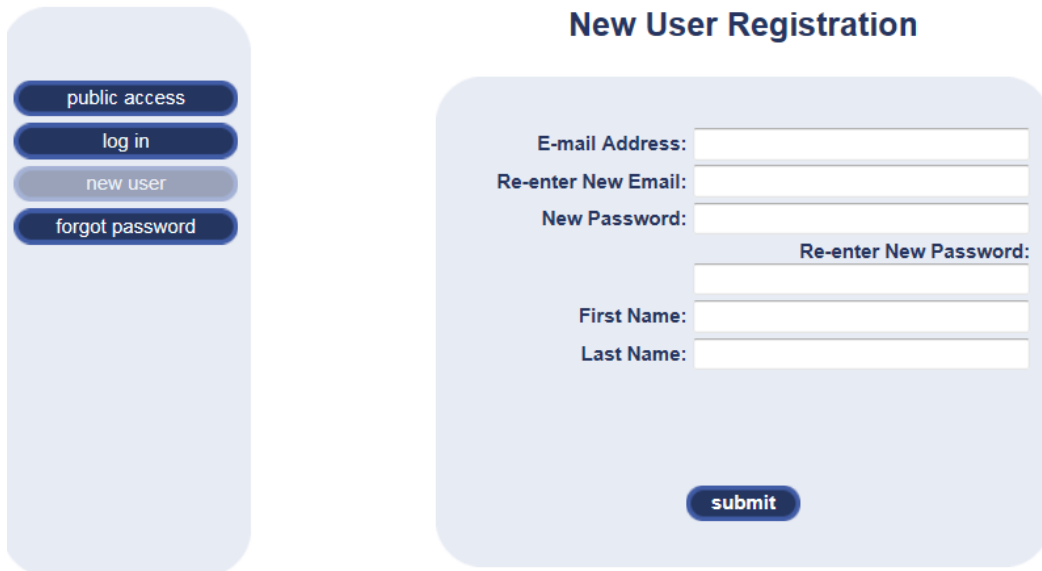
To add/delete Sales Tax accounts you can work with for this user profile, click on "manage accounts".

To change your password or other user information, click on "my user profile".

You can access the Citizen Access portal for online filing via the cities website  
<https://wsinno.ci.loveland.co.us/citizenaccess/>

## **HOW TO REGISTER FOR ONLINE FILING**

From the login page, select “new user” on the left and complete the fields required to register. Then click “submit”.



The image shows a 'New User Registration' form. On the left is a vertical sidebar with four buttons: 'public access', 'log in', 'new user' (highlighted), and 'forgot password'. The main form area has the title 'New User Registration' and contains the following fields: 'E-mail Address:', 'Re-enter New Email:', 'New Password:', 'Re-enter New Password:', 'First Name:', and 'Last Name:'. Each field has a corresponding input box. At the bottom right of the form is a 'submit' button.

A confirmation e-mail will be sent to the e-mail address provided containing a link to validate the account. Follow the link and a login screen will appear. Activate the account by logging in.

## **HOW TO LINK YOUR TAX ACCOUNT**

After registering and accessing the online filing portal, you will be prompted to link your city tax account to your username. To link your account go to “manage accounts” and select “add account” to lookup your account.



The image shows a 'Welcome to Tax & Licensing' page. On the left is a vertical sidebar titled 'tax & licensing menu' with the following buttons: 'file returns', 'return history', 'license information', 'apply for license', 'renew license', 'account information', 'manage accounts' (highlighted with a red arrow), 'outstanding balances', 'home', and 'log out'. The main content area has the title 'Welcome to Tax & Licensing' and contains the following text: 'Please select an option from the menu on the left.', 'To add/delete Sales Tax accounts you can work with for this user profile, click on "manage accounts".', and 'To change your password or other user information, click on "my user profile".'

You will then be prompted to enter your sales tax account number (this is your license number and **must** be five digits), the business location address (**only line 1**) as it appears on your license. Once you have

entered this information, select “ok” to link the account.

tax & licensing Account Lookup

Please enter your exact 5 digit account number, including any leading zeros. When you enter your location address, do not enter the City, State or Zip.

Account Number: 00001

Location Address: 123 N ABC ST

cancel ok

delete account(s) add account

**HOW TO FILE AND PAY**

1. FILE & PAY – Select “file returns” from the side menu. On the next screen select the year and period you are filing for and select “next” to continue. NOTE: If you file for more than one account you will need to use the drop down to select the correct account.

tax & licensing menu

file returns

return history

license information

apply for license

renew license

account information

manage accounts

outstanding balances

home

log out

cancel next

Returns Step 1/8: General Information \*

\* Select the account you would like to enter a return for: [dropdown]

\* Select which type of tax return you are filing: Sales Tax Return 3% [dropdown]

Filing Frequency: Monthly

\* Enter the year you would like to file for: 2015 [dropdown]

\* Enter the filing period you would like to file for: December 2015 [dropdown]

Start Date: 12/01/2015

End Date: 12/31/2015

Due Date: 01/20/2016

2. ENTER THE RETURN – You will then be prompted to enter information into each of the fields from the tax return (gross sales & service, bad debts, deductions, etc.,) select “next” after completing the information on each screen. After entering all information, a summary will be provided. You may select “back” at any time to make changes.

The screenshot shows the 'Returns Step 5/8: Summary' screen. On the left is a 'tax & licensing menu' with buttons for 'file returns', 'return history', 'license information', 'apply for license', 'renew license', 'account information', 'manage accounts', 'outstanding balances', 'home', and 'log out'. The 'file returns' button is highlighted. At the top right are 'back', 'cancel', and 'next' buttons. A red arrow points to the 'next' button. The main content area displays a summary of tax information:

<b>Returns Step 5/8: Summary</b>	
Note: Penalty is \$15 or 10% of amount due, whichever is greater.	
Total Gross Sales:	\$10,000.00
Deductions:	\$7,570.00
Sales Tax 3% Rate:	3%
Total Sales Tax 3% Due:	\$72.90
Construction Use Tax Rate:	3%
Total Construction Use Tax Due:	\$0.00
Account Allowance:	\$1.46
Total Tax Due:	\$71.44
Months Overdue:	0

3. PAY & SIGN – Next, you will be prompted to enter payment information (if applicable) and sign your return. On the payment screen enter the checking account and routing number. NOTE: Please be sure that you have provided your bank with the cities Originator ID number 1846000609, sometimes called customer number, or client ID prior to submitting payment.

The screenshot shows the 'Returns Step 7/8: Payment' screen. It includes the same 'tax & licensing menu' on the left. At the top right are 'back', 'cancel', and 'next' buttons. The main content area displays payment information and fields for account details:

<b>Returns Step 7/8: Payment</b> <span style="color: red;">*Required</span>	
Please double check your routing number and account number, as rejection by your bank due to incorrect entry could result in a \$25 processing fee for resubmission.	
Total Amount Due:	\$71.44
Payment Amount:	\$71.44
*Name on Account:	Bobby Taxpayer
*Account Type:	Checking ▼
*Routing Number:	000000000 <a href="#">Help me find it!</a>
*Account Number:	123456789 <a href="#">Help me find it!</a>

On the legal screen type your first and last name to certify that the return is legal and valid.

4. **CONFIRMATION** – Your return is now filed. A submission confirmation page will appear and a confirmation e-mail with a copy of the filed return will be sent.