

ONE SPOT Demo to Assist NEW Taxpayers with Filing Non-State Administered (NSA) Taxes in My Alabama Taxes (MAT)

1. Setup Local Tax Account Access
2. Add Banking Information
3. Enter Data on Local Tax Return Table

During the demo, click the buttons or links on the page, do not scroll through the document.

NEXT

NSA Instructions for MAT Demo

Demonstration steps for taxpayer that has never filed a Local Tax return in MAT:

- Set up Local Tax account access. **NOTE:** Taxpayers do NOT add access to their NSA account number, they file their NSA taxes through the State assigned Local Tax account.
 - On the Accounts page, find the Local Tax box and click the “Make this account visible on MAT” link.
 - Click “Save”
 - Do the same for all other tax types listed on their Accounts’ page that they want to access in MAT.
- Set up banking information. Although recommended as the second step, it is not required. Banking set up may be processed on the payment screen of the Local Tax return and saved as the default payment channel, if chosen. Setting it up as the second step makes the user aware of where and how they can change their banking information in the future.
- File Local Tax Return
 - In the “Local Tax” account box, click “File or View a return.”
 - Click “File Now” or the “Local Tax Return” link.
 - The first screen of the Local Tax return provides instructions and links to various information.
 - Click “Next.”
 - Add Locality. Start typing locality’s name in the first empty “Locality” white field to obtain a condensed list. NOTE: There will always be an empty row in the return table for use in adding new localities to the return.
 - Enter all remaining required information.
 - Select “One-Time Filing” checkbox ONLY if taxpayer does not need to retain information for subsequent filings. If unchecked, the local information will be retained for the next return filing.
- Discount, Late Fees, and Interest calculations can be viewed on the “Overview” screen after completing the Return Table. If changes are required, the taxpayer must click the Previous button to return to the “Return Table”
- The taxpayer must confirm the payment information on the Payment screen and select “**Submit**” for return/payment to be processed. The “Submit” button is not available in the demo.

NOTES:

- Demo is not date based. Calculations are made for discount but not P&I.
- Banking set up information shown in Demo does not carryforward to return/payment Demo.

[Click here to start Demo](#)

ABC BAKERY

_*8888
50 N RIPLEY ST
MONTGOMERY AL 36130-1001

First time users must set the account access for each of their accounts by clicking the "Make this account visible on MAT" link.

Welcome, Lisa

You last logged in on Monday, Oct 4, 2021 3:19:58 PM

[Manage My Profile](#)

Accounts Tasks Security Other Actions...

Filter [X]

<p>ABC BAKERY **_***8888 50 N RIPLEY ST MONTGOMERY AL 36130-1001</p>	<p>Correspondence</p> <ul style="list-style-type: none"> > View/Print mail from ADOR > View MAT Messages > View my previous MAT Submissions <p>Registration</p> <ul style="list-style-type: none"> > Manage names & addresses > Register additional tax types/Obtain a new tax account number
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<p>Local Tax ABC BAKERY 50 N RIPLEY ST MONTGOMERY AL 36130-1001</p>	<p>Account LCL-R000729561</p> <p>Click → > Make this account visible on MAT</p>
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<p>Sales Tax</p>	<p>Account</p> <p>Scroll for More</p> <p>> Make this account visible on MAT</p>
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Add Account Access

Local Tax
LCL-R000729561
ABC BAKERY

Settings

Add Local Tax to MAT

Click Save to continue.

Click



Cancel

Save

ABC BAKERY

_*8888
50 N RIPLEY ST
MONTGOMERY AL 36130-1001

Welcome, Lisa

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It is recommended to setup banking information next.

Click

- Accounts
- Tasks ³
- Security
- Other Actions...

Filter



ABC BAKERY

_*8888
50 N RIPLEY ST
MONTGOMERY AL 36130-1001

Correspondence

- > [View/Print mail from ADOR](#)
- > [View MAT Messages](#)
- > [View my previous MAT Submissions](#)

Registration

- > [Manage names & addresses](#)
- > [Register additional tax types/Obtain a new tax account number](#)

The account is now active and available to file returns.

Local Tax

ABC BAKERY
50 N RIPLEY ST
MONTGOMERY AL 36130-1001

[Tasks](#) ³

Account

LCL-R000729561

Balance

\$0.00

- > [File or View a return](#)
- > [Make a payment](#)

Scroll for More



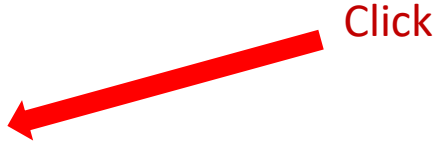
< [ABC BAKERY](#)

Manage My Profile

Lisa

abc@abcbakery.com

Profile **Tasks** ¹ **Other Actions...**



Profile

Name

Lisa

[Update Name](#)

My Email

abc@abcbakery.com

[Change Email](#)

My Phone Number

+1 (334) 334-3344

[Edit Phone Number](#)

Security

Password

Last changed October 4

[Change Password](#)

Secret Question

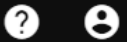
What is your favorite town?

[Update Your Secret Question](#)

Two-Step Verification Settings

Codes are sent via email

[Change Two-Step Settings](#)



< [ABC BAKERY](#)

Manage My Profile

Lisa
abc@abcbakery.com

Profile Tasks ¹ **Other Actions...**

Access

Manage access of accounts I have access to.

- > [Add access to an existing tax account](#)
- > [Manage My Access](#)
- > [Manage Third Party Access](#)
- > [Delete My Profile](#)

My Users

Manage users who work for me.

- > [Manage Secondary Logons](#)

Other Users

Manage users who are associated to me.

- > [Manage Additional Logons](#)

Stored Bank Information

Manage which bank accounts I use to make payments on MAT.

- > [Manage stored bank information](#) **Click**

MAT Submissions

Lists of Stored, Pending, and Processed requests.

- > [View my previous MAT submissions](#)

MAT Messages

View MAT messages I've received from the Alabama Department of Revenue.

- > [View MAT messages](#)

Activity

View my activity on My Alabama Taxes.


Scroll for More



[Manage My Profile](#)

Bank Information

ABC BAKERY - **-*8888

[+ Add a bank account](#)  **Click**

No default payment channel

[Local Tax](#)

LCL-R000729561

[Sales Tax](#)

SLS-R000749601

< Payment Channels

Corporation

ABC BAKERY
-*8888

Bank Information

This bank information will be available for you to use for all of this customer's accounts.

Type
Direct Debit

Bank Account

Bank Account Type *

Checking	Savings
----------	---------

Routing Number *

Required

[Populate Routing Number](#)

Account Number *

Required

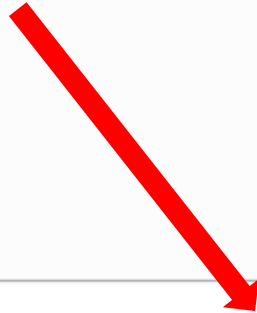
Re-enter Account Number *

Required

Name *

Required

← Complete information and Click "Save".



Cancel Save



< [Payment Channels](#)

Bank Information

[Rename](#)

JPMORGAN CHASE - *5555

For: ABC BAKERY

Direct Debit

JPMORGAN CHASE

Checking

: 021000021

: ***5555

[Remove this bank information](#)

Tax Accounts Using This Bank Information

No tax accounts are using this bank information.

Click "Payment Channels" to get back to the list of accounts to attach to this saved banking information.



[Manage My Profile](#)

Bank Information

Filter

ABC BAKERY - **-*8888

[Add a bank account](#)

[JPMORGAN CHASE - *5555](#)

No default payment channel

Click  [Local Tax](#)

LCL-R000729561

[Sales Tax](#)

SLS-R000749601

Either tax account type may be selected first; however, this example is for Local Tax.

[< Payment Channels](#)

Default Payment Channel

Local Tax

LCL-R000729561

ABC BAKERY

Bank Information

Select Bank Account

Current Default


No current default

ABC BAKERY - **-***8888

JPMORGAN CHASE - *5555

[Set as default](#)

 **Click**

 [Add a bank account](#)

[Payment Channels](#)

Default Payment Channel

Local Tax
LCL-R000729561
ABC BAKERY

Bank Information

Select Bank Account

Current Default

No current default

ABC BAKERY - **-***8888

JPMORGAN CHASE - *5555

[Set as default](#)

[+ Add a bank account](#)



Are you sure you want to set this payment channel as the account's default?

No

Yes

← Click

[Payment Channels](#)



Click on this "Payment Channels" link to get to the other tax types to set their default payment channel.

Default Payment Channel

Local Tax

LCL-R000729561



ABC BAKERY

The saved payment channel now shows as the current default for the "Local Tax" account.

Bank Information

Select Bank Account

Current Default




JPMORGAN CHASE - *5555

[Clear default](#)

ABC BAKERY - **-*8888

JPMORGAN CHASE - *5555

Current default

 [Add a bank account](#)



[Manage My Profile](#)



Bank Information

ABC BAKERY - **.*8888

[Add a bank account](#)

JPMORGAN CHASE - *5555	Local Tax	LCL-R000729561
	Sales Tax	SLS-R000749601

When done setting the default banking on all accounts, click the “My Alabama Taxes (Home)” link.

ABC BAKERY

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50 N RIPLEY ST
MONTGOMERY AL 36130-1001

The account is now ready to file returns.

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[Manage My Profile](#)

- Accounts
- Tasks ³
- Security
- Other Actions...

Filter [X]

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Correspondence

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Registration

- > [Manage names & addresses](#)
- > [Register additional tax types/Obtain a new tax account number](#)

Local Tax

ABC BAKERY
50 N RIPLEY ST
MONTGOMERY AL 36130-1001

[Tasks](#) ³

Account

LCL-R000729561

Balance

\$0.00

Click →

- > [File or View a return](#)
- > [Make a payment](#)

Scroll for More

< ABC BAKERY

Returns

Local Tax
LCL-R000729561
ABC BAKERY

Balance
\$0.00

> [Make a Payment](#)

Use either link to click directly to the tax return.

List of Returns Periods and Balances

Returns

Return	Period	Due Date	Received Date	Status	
Local Tax Return ← Click	30-Sep-2021	20-Oct-2021		Outstanding	File Now ← Click
Local Tax Return	31-Aug-2021	20-Sep-2021		Delinquent	File Now
Local Tax Return	31-Jul-2021	20-Aug-2021		Delinquent	File Now

The balances shown reflect only the accounts and filing periods shown in MAT and may not reflect your overall balance with the Alabama Department of Revenue.

Clicking the Period date takes you to the Period screen where you can also reach the tax return to file and to view all prior activity on that tax period.