Welcome to the Use Tax efile tutorial. If you are a use tax payer, this video is for you. In this short video, we will give you a few helpful hints, take you step by step through the efile process and explain how to fill out the electronic filing form. Please be advised that this filing is for Use Tax only. This video provides the basic information you will need.

Additional Help

800-400-7115

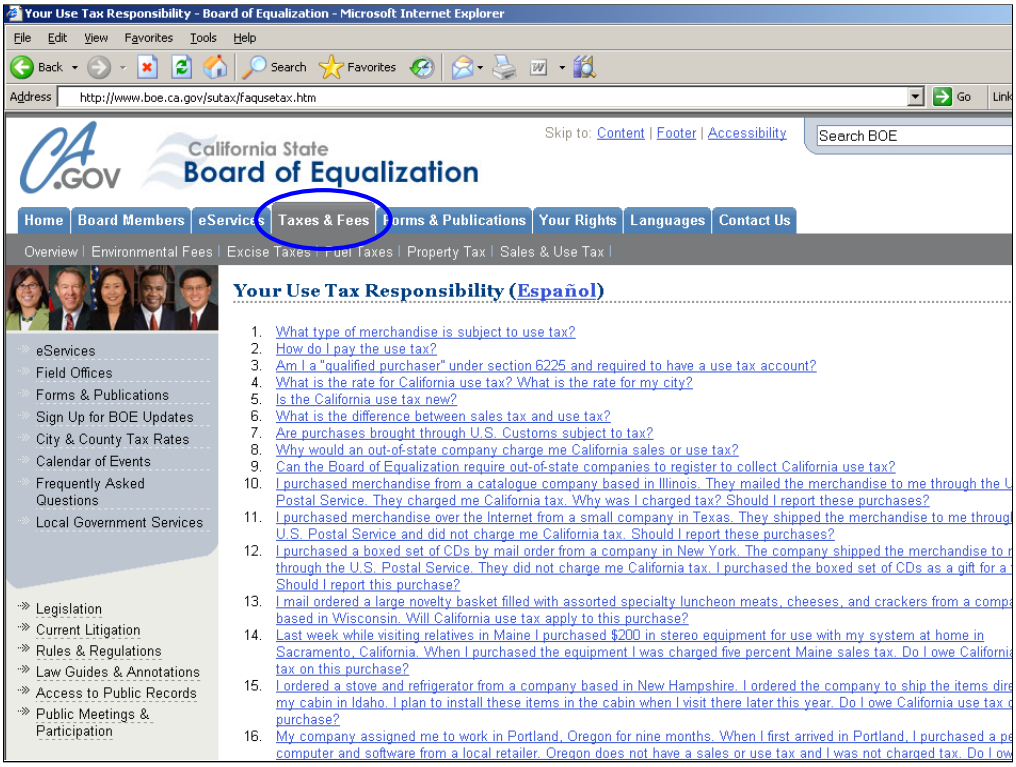
If, at any time, you need assistance or more information, please call 800-400-7115 during regular business hours.

Use Tax

Frequently Asked Questions and Answers

www.boe.ca.gov/sutax/faqusetax.htm

You can find more information about Use Tax and the filing requirements by going to this link on the Board of Equalization web page.



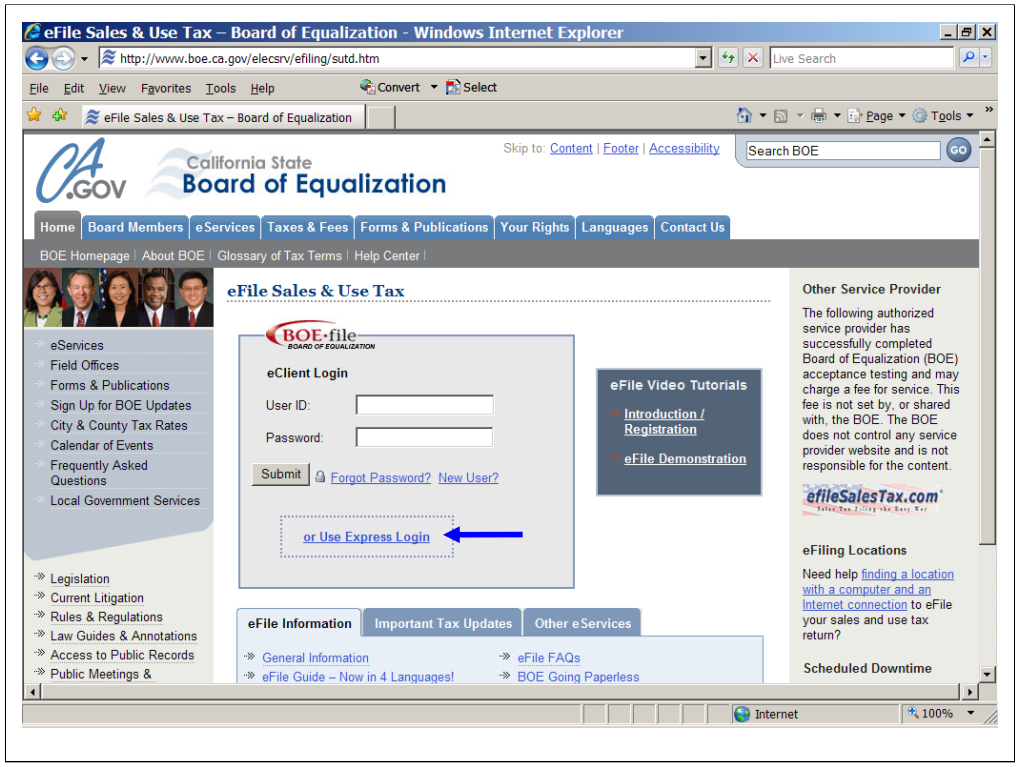
The link will take you to the Use Tax Frequently Asked Questions web page and features a option to view in Spanish.

Please click on “Espanol” to view in Spanish.

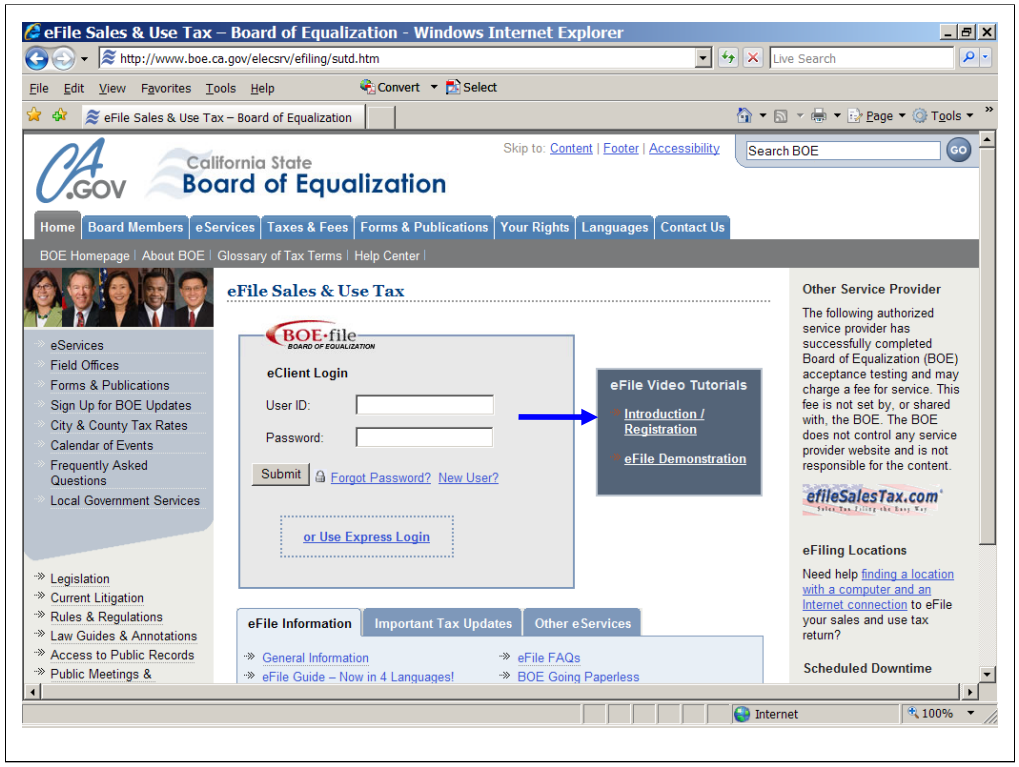
File your Use Tax Here

www.boe.ca.gov/elecsrv/efiling/sutd.htm

Follow this link to the efile login page to file your Use Tax return.

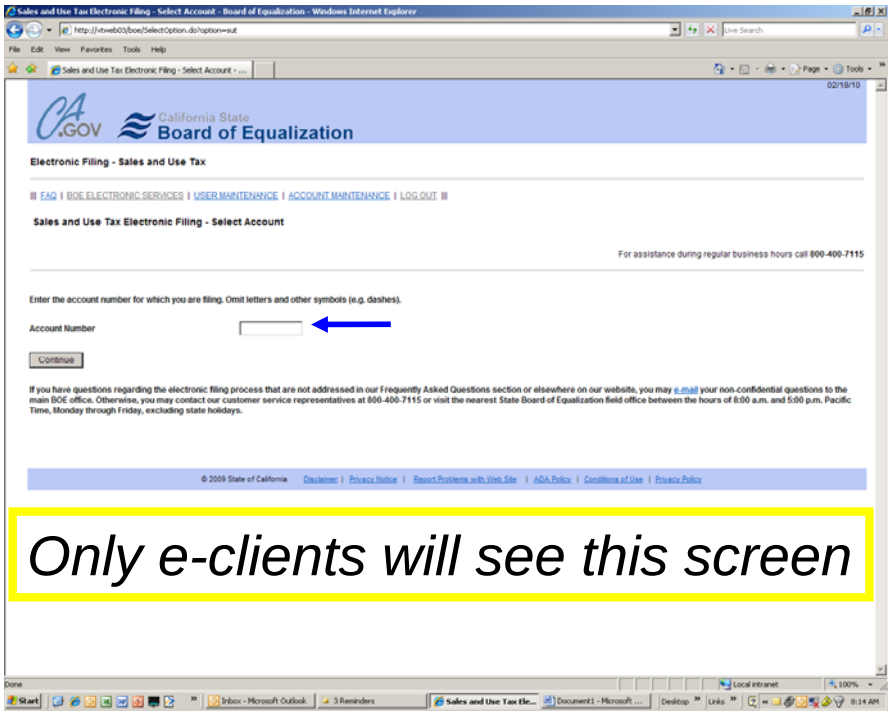


There are two ways to login to file your return. You can use the express login method and go straight to filing your return after entering your account number and express login code. Both the account number and express login code can be found on correspondence you received from the Board of Equalization. If you can not find these numbers, please call us at 800-400-7115.

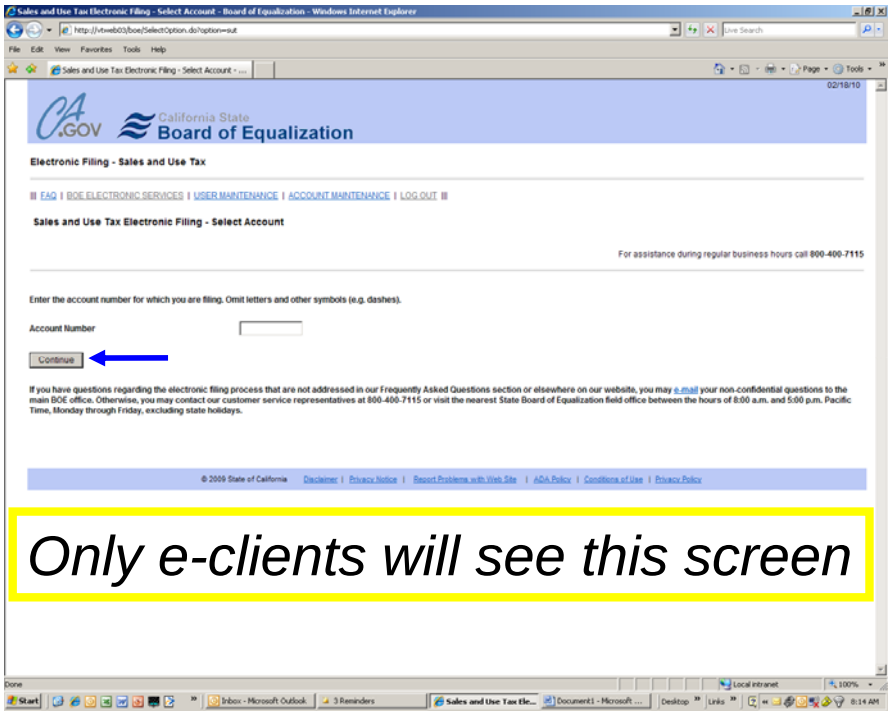


Or, you can login as an eclient. If you haven't already registered as an eclient, the process is quick and easy. Eclients create their own user id and password. You can watch a video on registering as an eclient here.

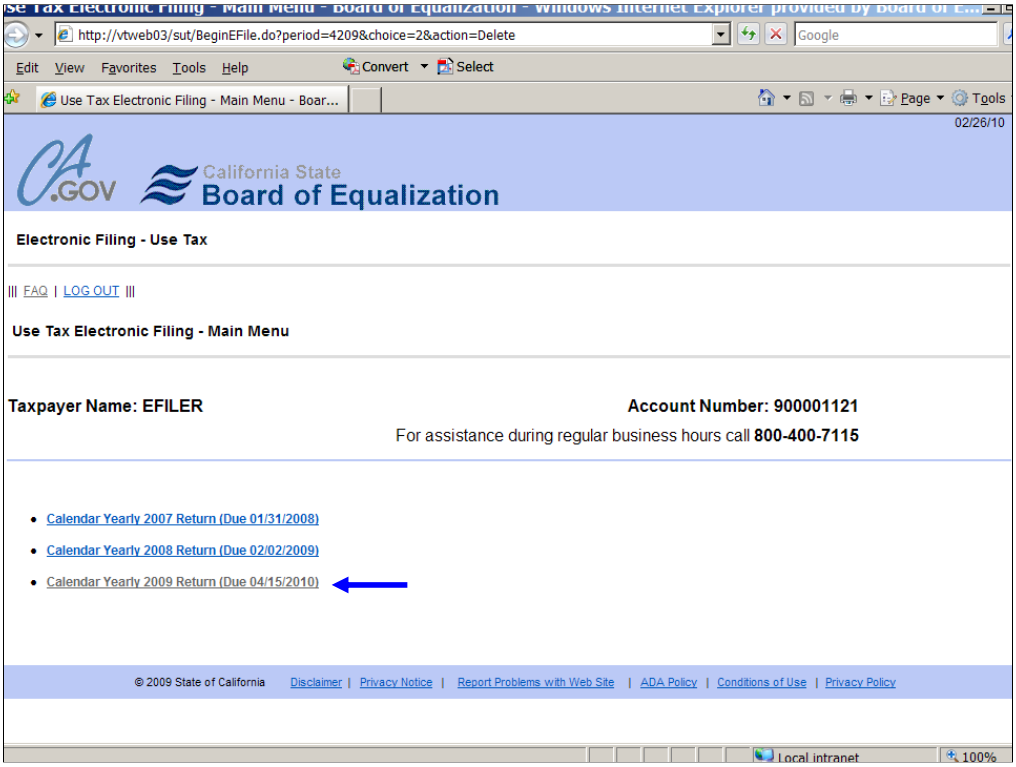
If you log in as an eclient, select *File Your Sales and Use Return / Prepayment* link to begin.



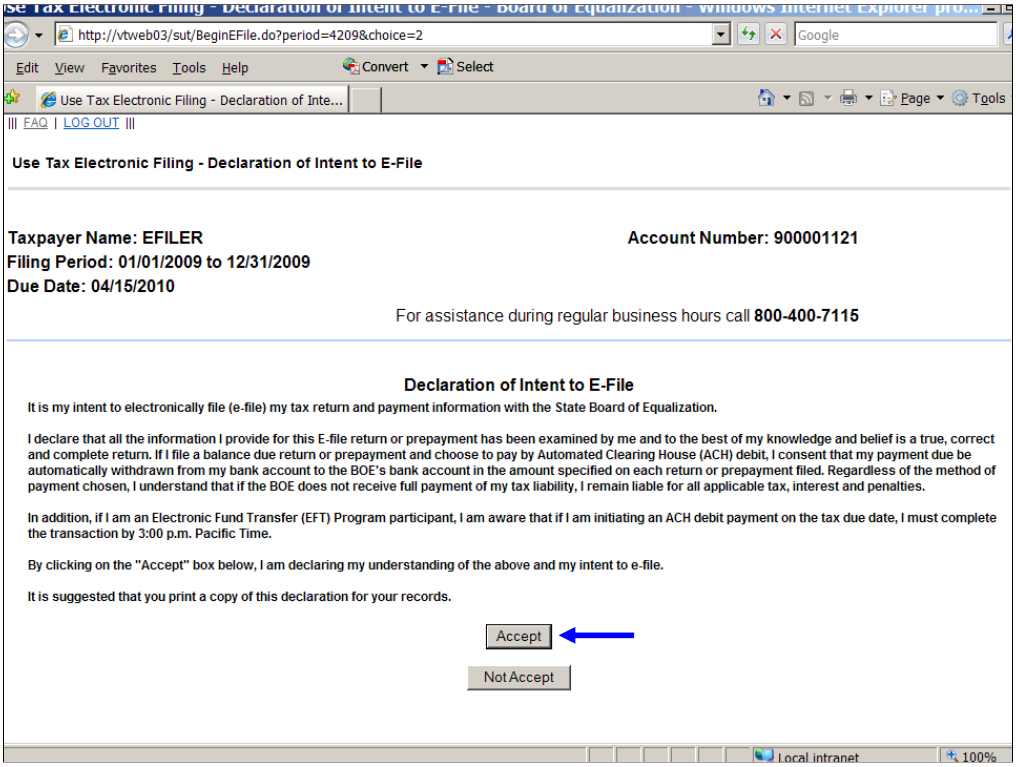
On the next screen, enter your account number. Include numbers only and no dash.



Then click on the Continue button.

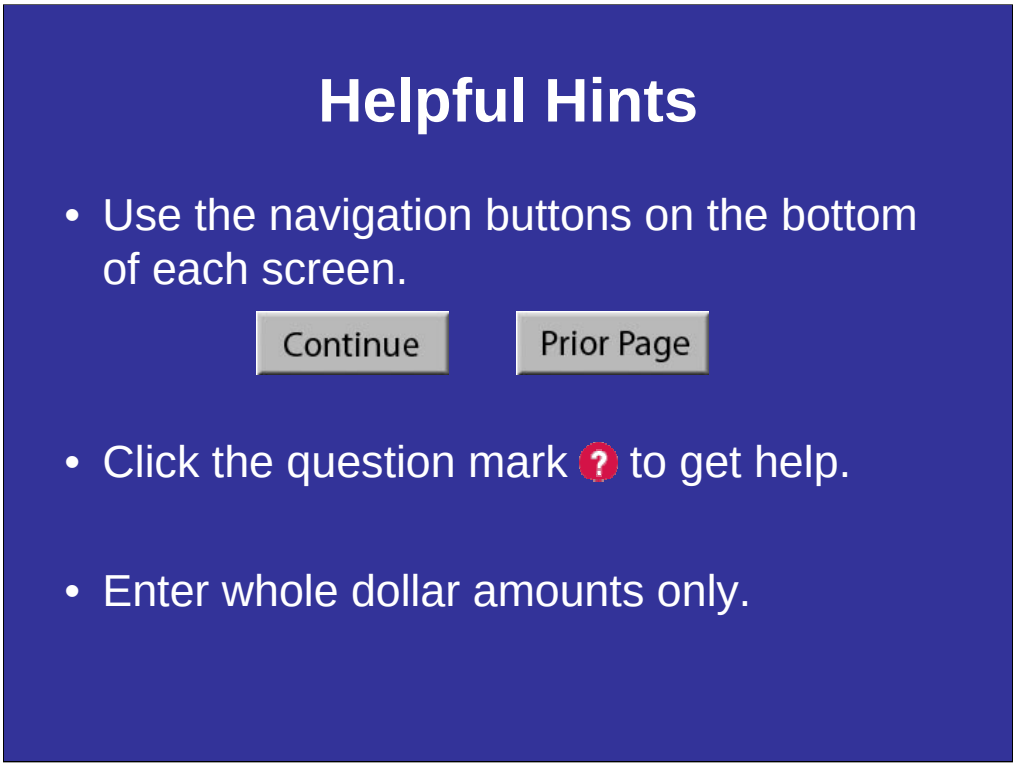


Whether you logged in as an eclient or with the express login method, you will now select the return you wish to file. On this page, you will see your name and account number. Under your name you will see the returns that are available for you to file. Choose the return you wish to file at this time.



You will then be taken to a page that states your declaration of intent to efile. If you do not intend to efile, click the “not accept” button to exit the application. Otherwise, read the information stated on the declaration and print it for your records if you so choose. If you understand and agree with the declaration, click the “Accept” button.

Once you click on Accept you will be taken to the Return.

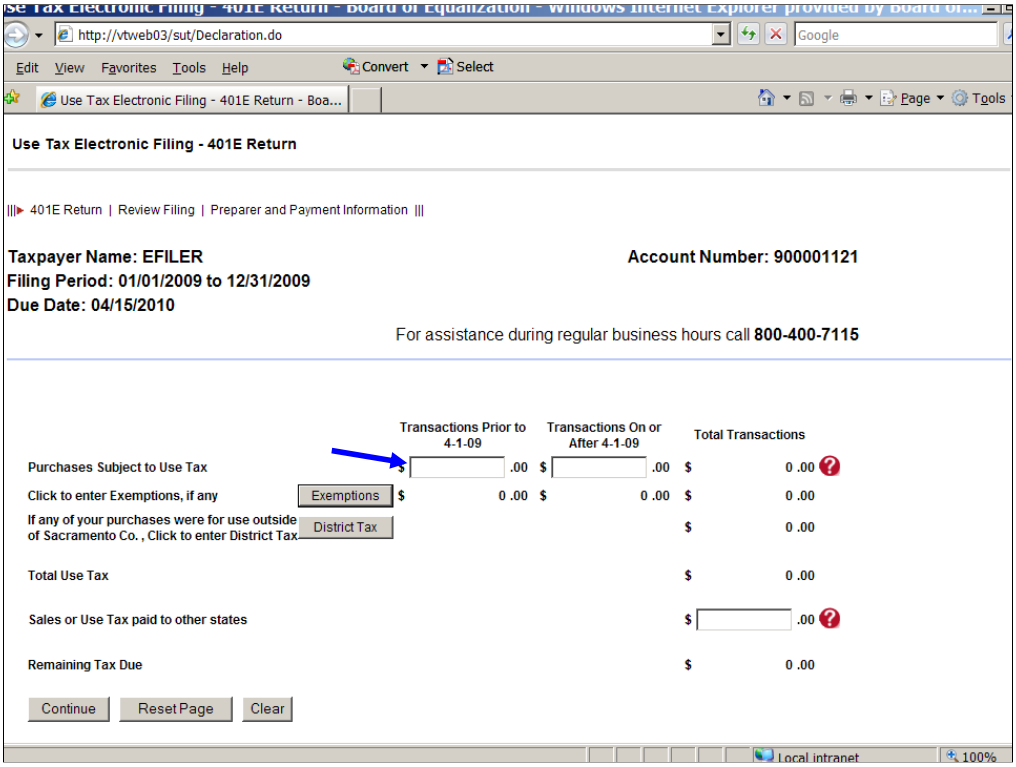


Here are some helpful hints before you get started:

While navigating through our efile system, do not use your browser back button. Instead, use the navigation buttons on the bottom of each page.

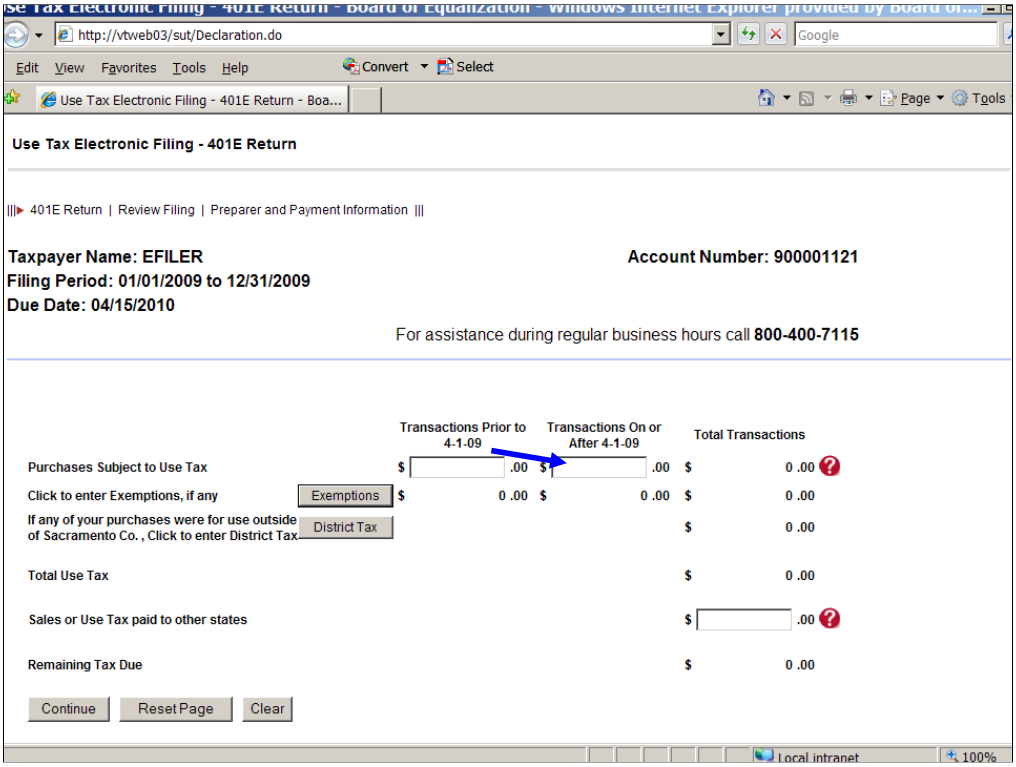
The question mark indicates that help is available. It does not indicate an error. If you are unsure what to enter on a particular line, click on the question mark. A new window will open to provide a detailed explanation. When you are finished reading the help screen, you will need to click on the X in the top right corner to close that window and go back to the previous screen.

When entering your figures, enter whole dollar amounts only, rounding to the nearest dollar. Make sure not to use any punctuation such as commas or decimal points.

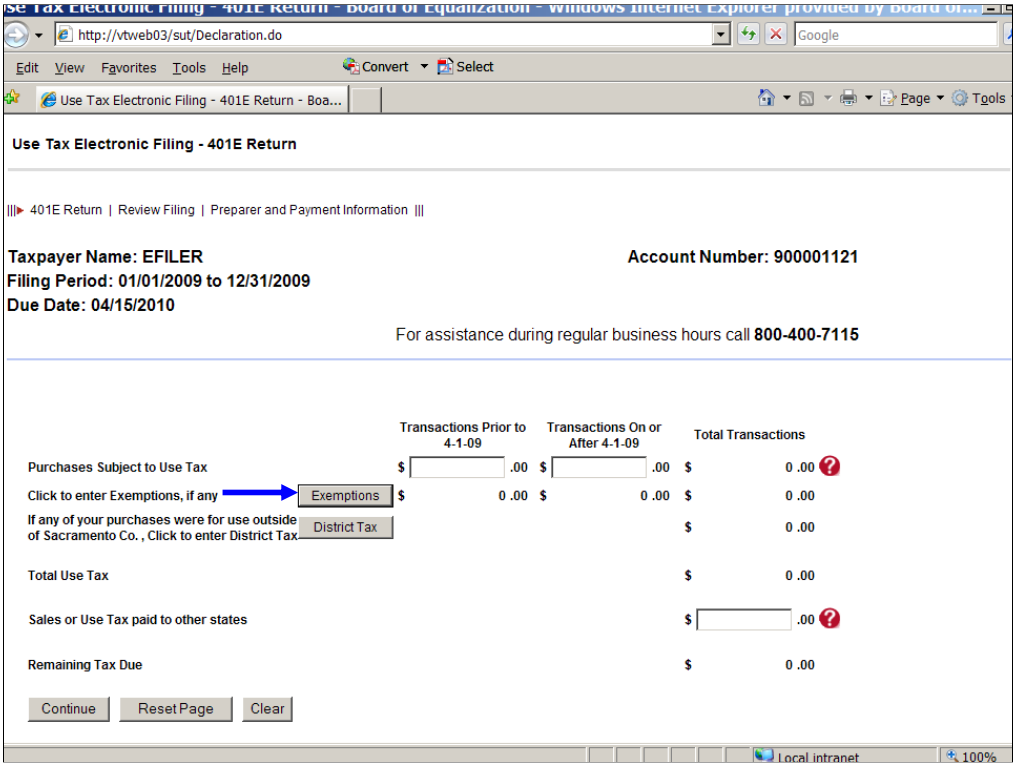


Continuing on…

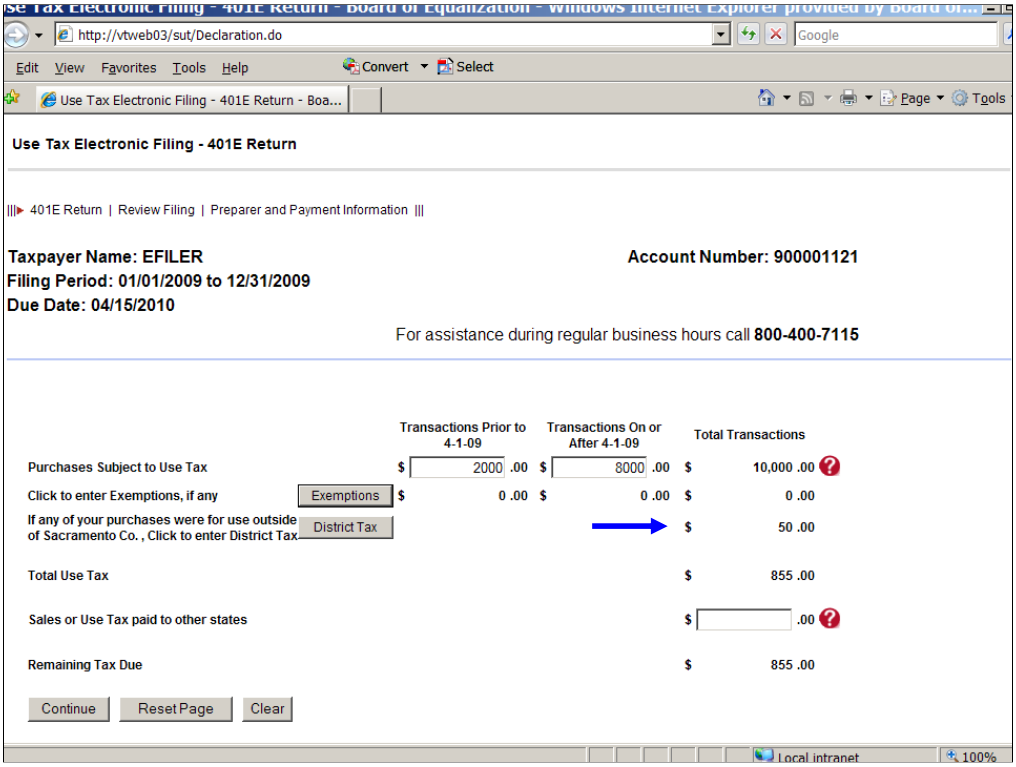
On this page, you will see two boxes to the right of Purchases Subject to Use Tax. The two time frames are separated because on April 1, 2009 the tax rate changed. Fill in the amount of your transactions prior to April 1, 2009 in the first box



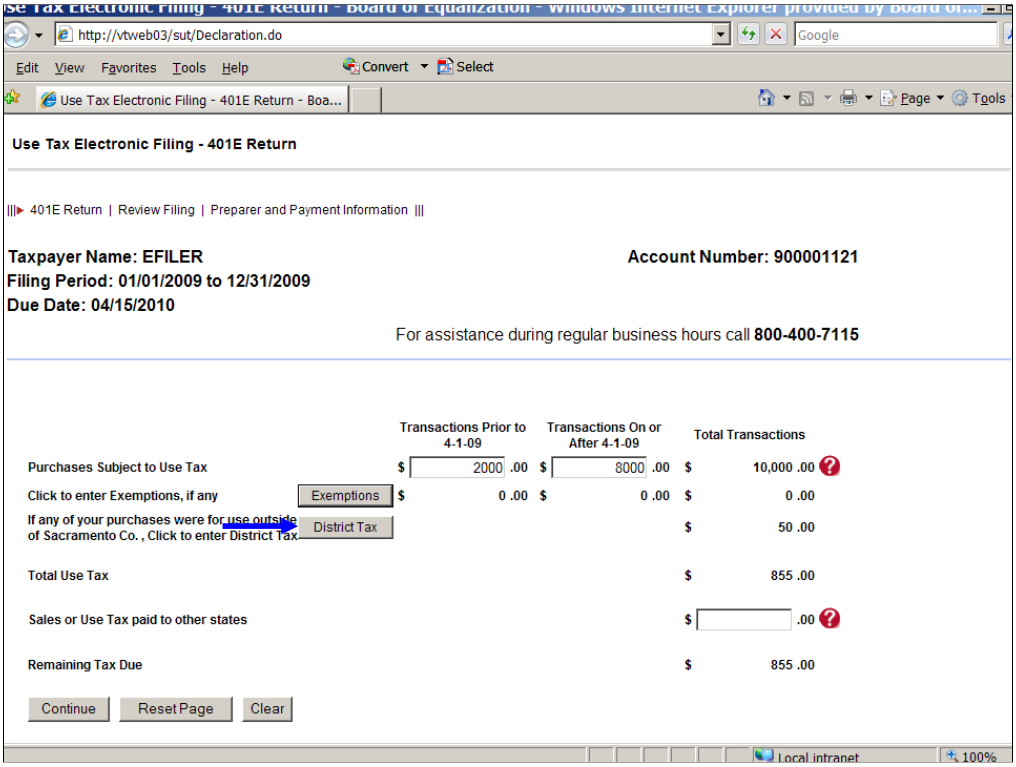
and the amount of your transactions on or after April 1, 2009 in the second box. The total will be automatically calculated for you.



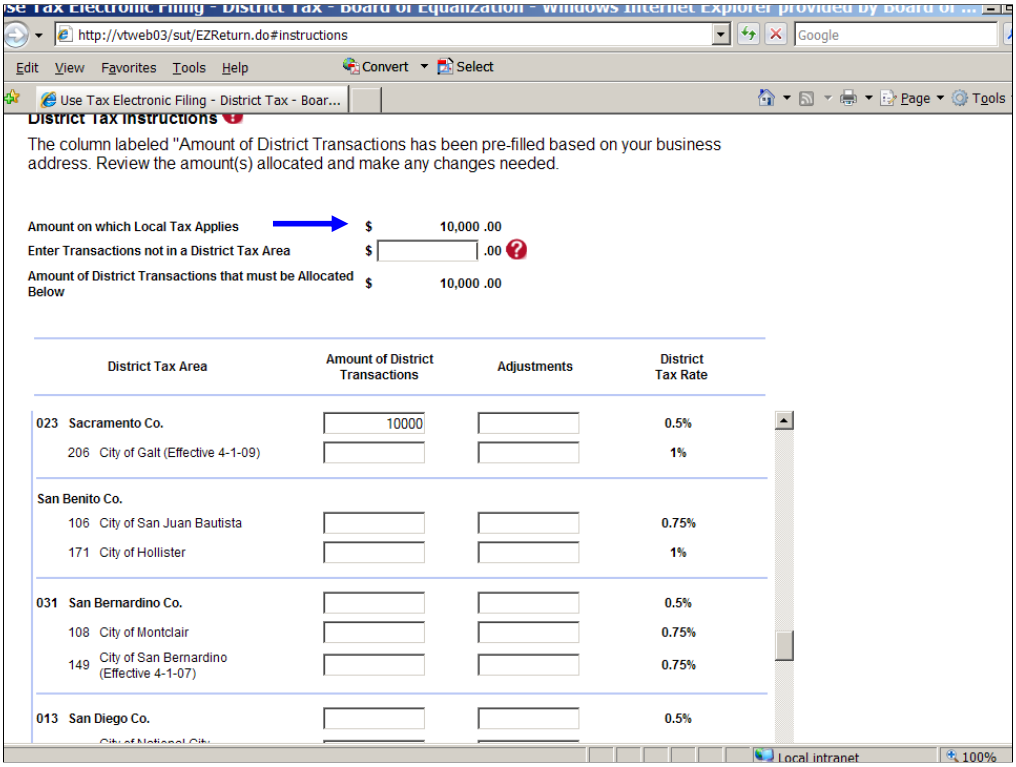
Most filers do not have exemptions, but you may click on the exemptions button to see if any apply to you.



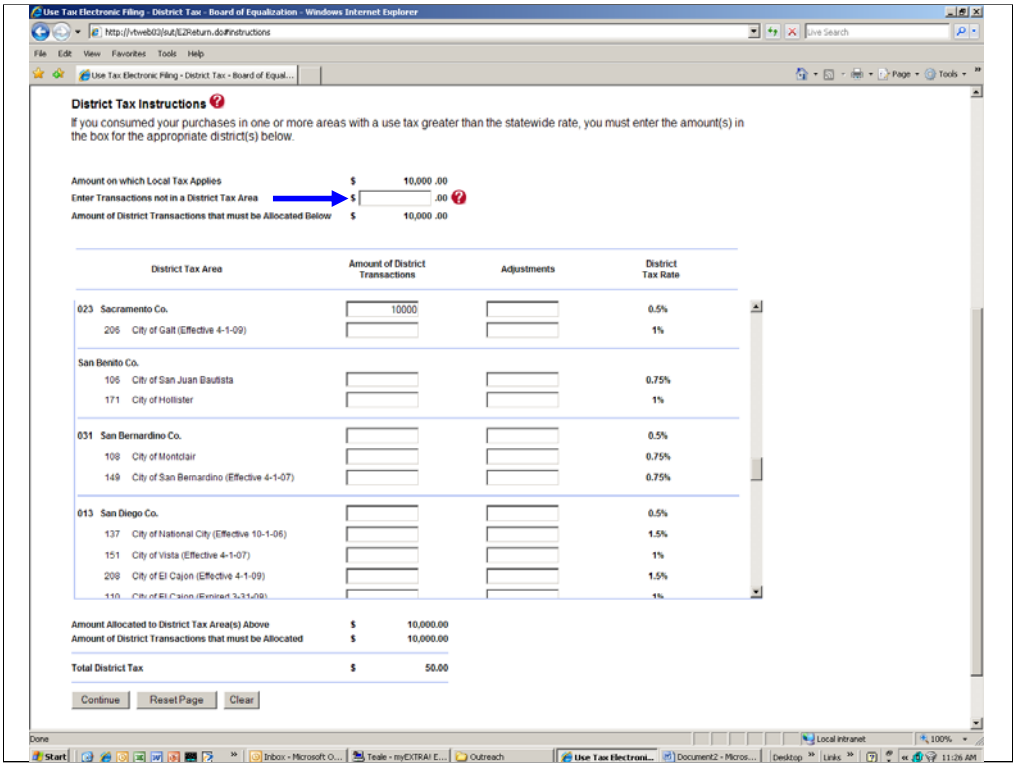
Next we will enter district tax. If your tax rate did not change within the filing period, your district tax may have been pre-filled based on your business address.



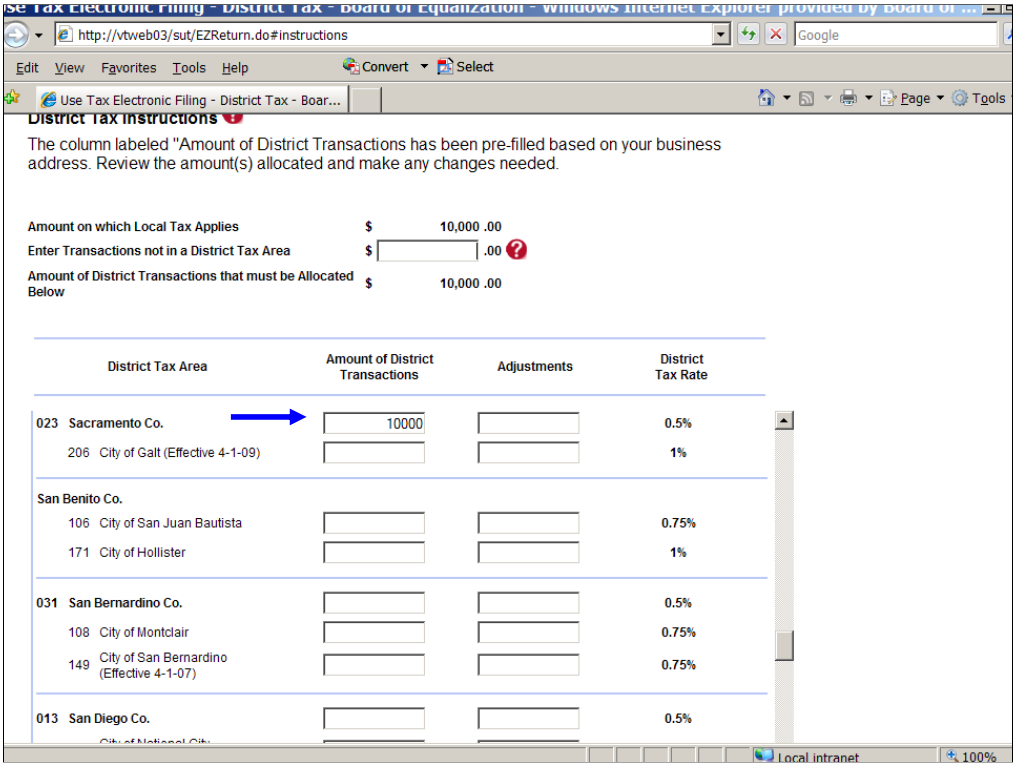
If you need to make changes, review the information, or enter your district tax please click on the district tax button.



When you click on the district tax button, you will be taken to this screen. The amount on which local tax applies is displayed here.



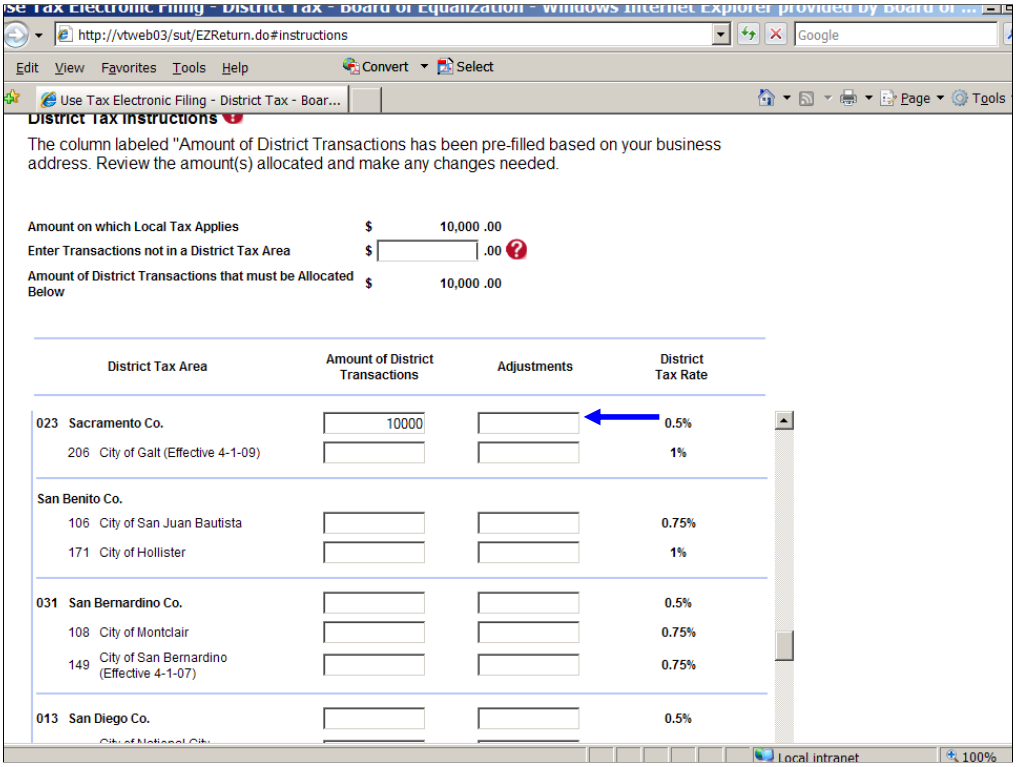
Enter any transactions that are not in a district tax area. In other words, enter any transactions where the total tax was not greater than the statewide rate as noted on the top of the page.



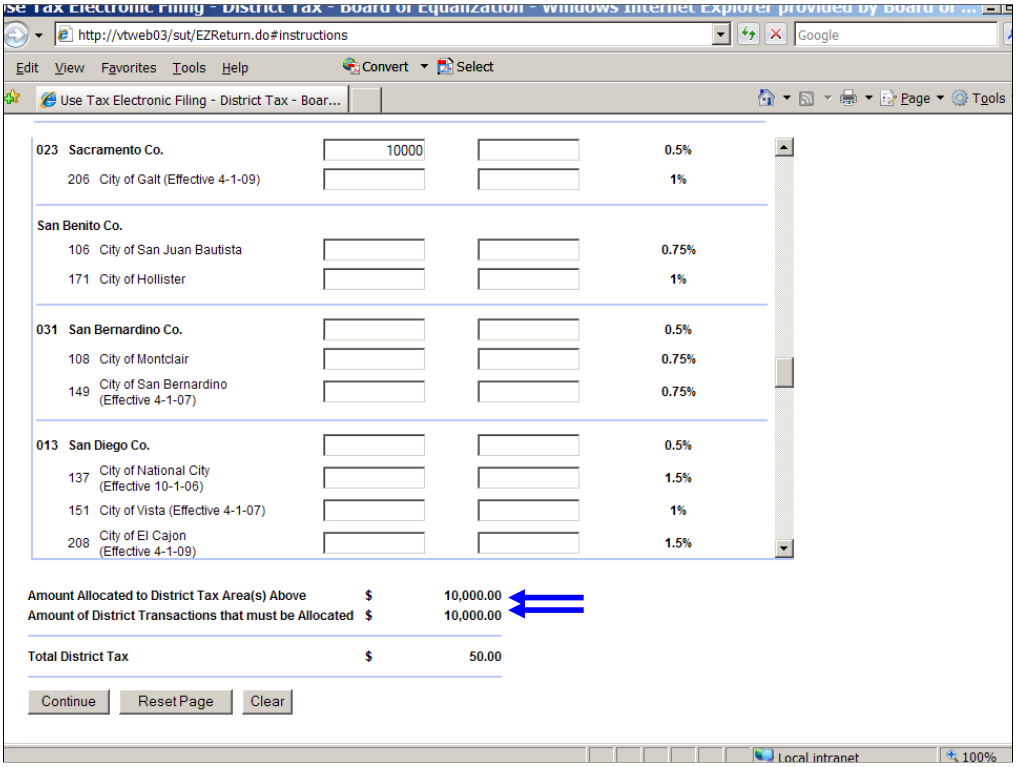
The remaining amount needs to be allocated to the appropriate county and city in the table below.

This table is in alphabetical order by county, with the cities listed below their county.

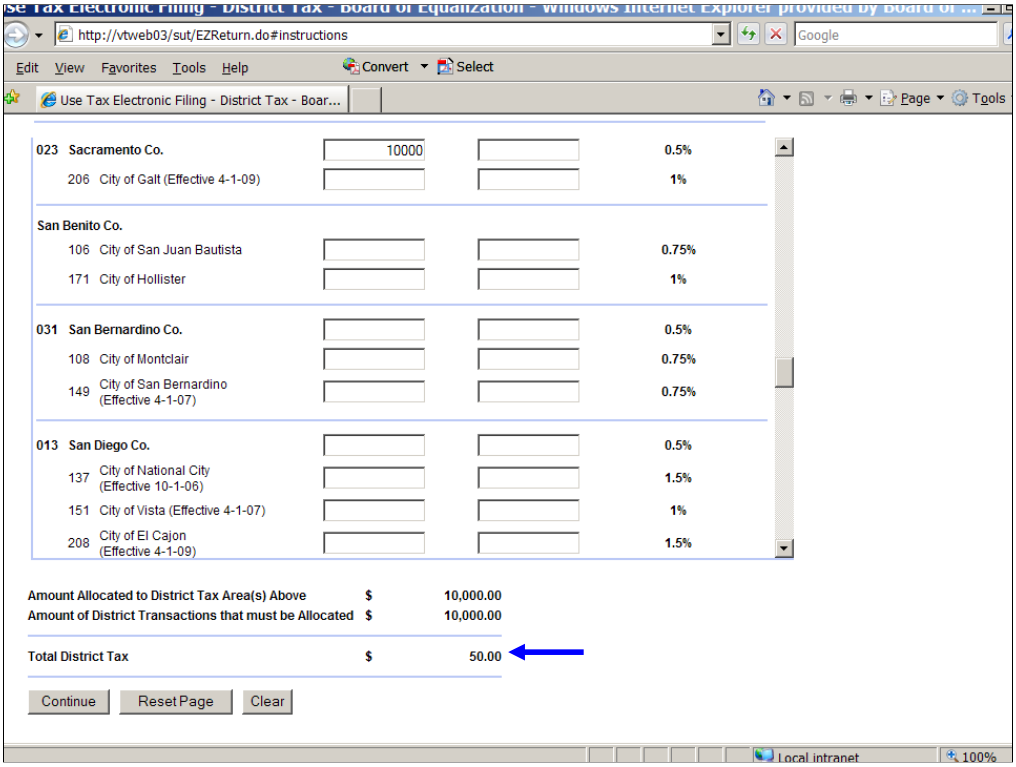
Enter the total purchase figures for each county or city in the first column. The tax for that area will be automatically calculated.



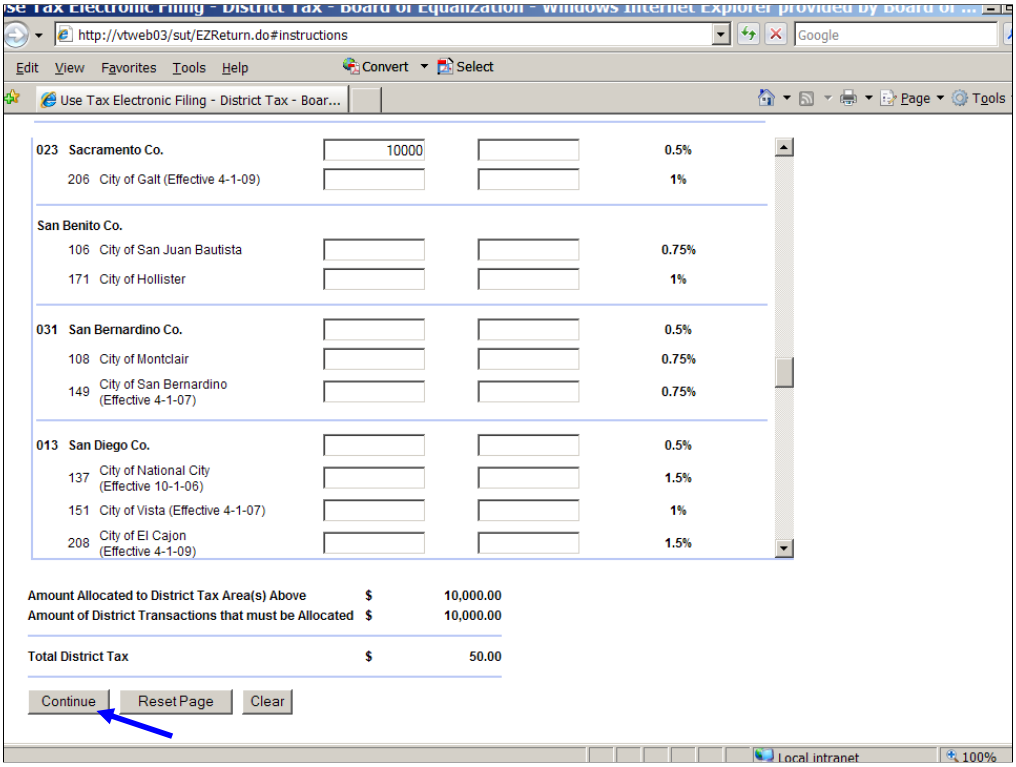
Only enter information in the adjustments column if you need to reallocate taxes from previous periods.



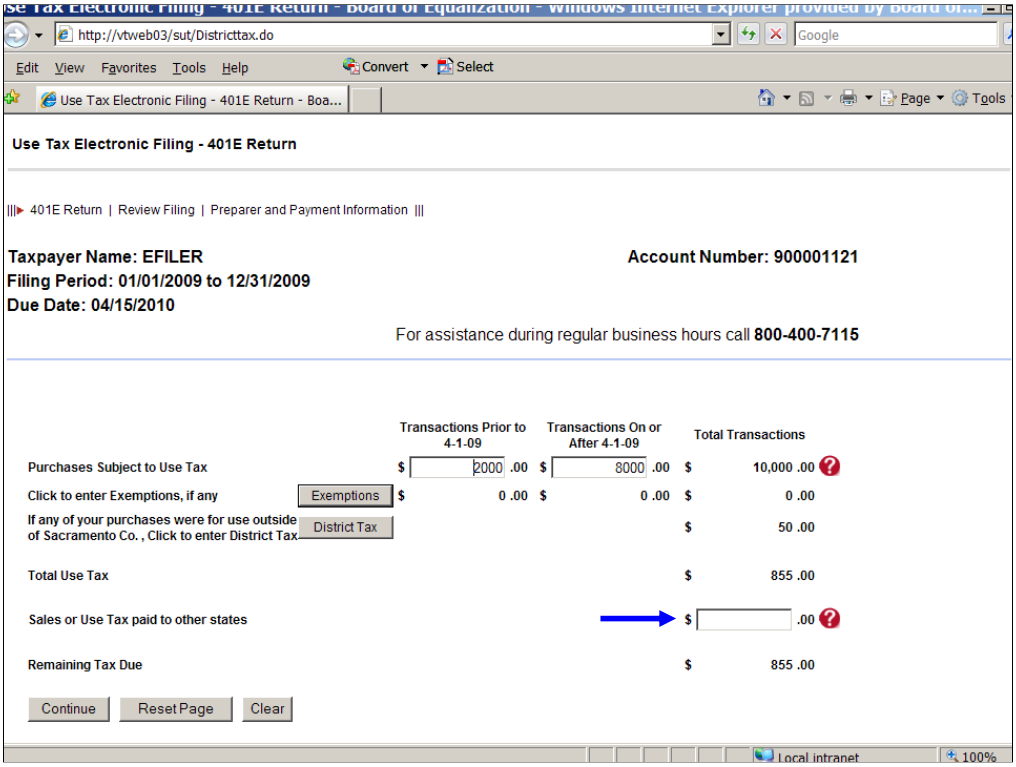
Below the table, the total amount of purchases you entered is calculated and displayed next to the field called “Amount Allocated to District Tax Areas Above”. This total needs to match the amount on the line directly below labeled “amount of district transactions that must be allocated”. These two amounts must equal each other before you can successfully efile your return.



Your total district tax has been calculated for you and displays on the last line.

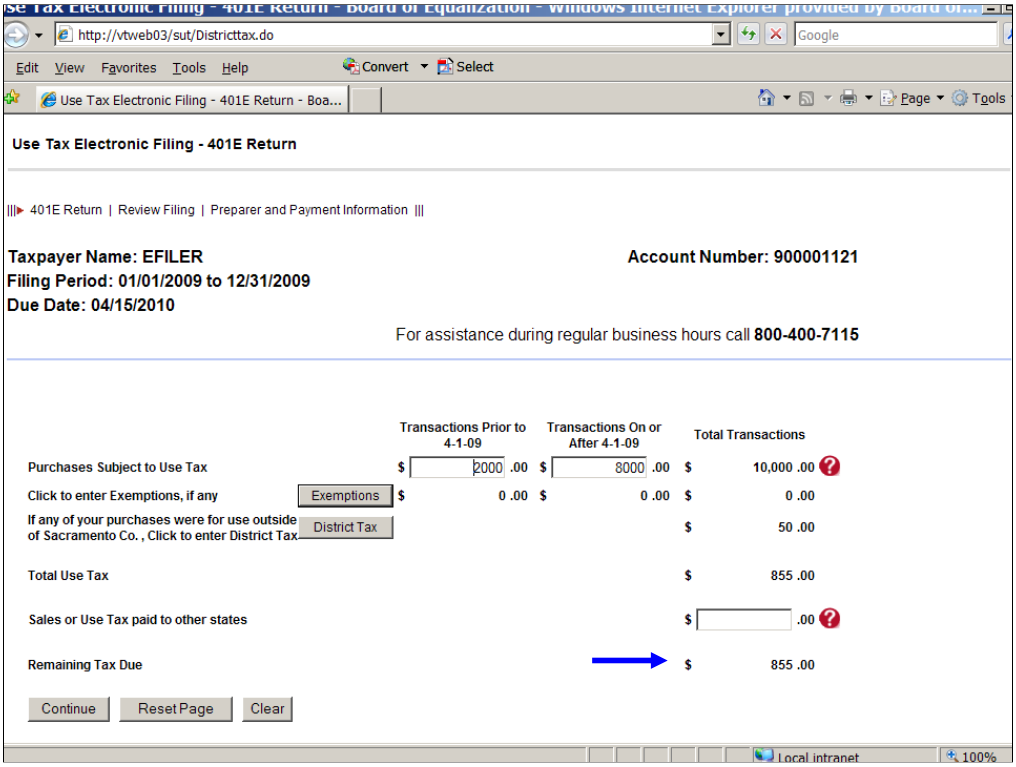


Once your figures balance, please click “continue” to return to the main page.

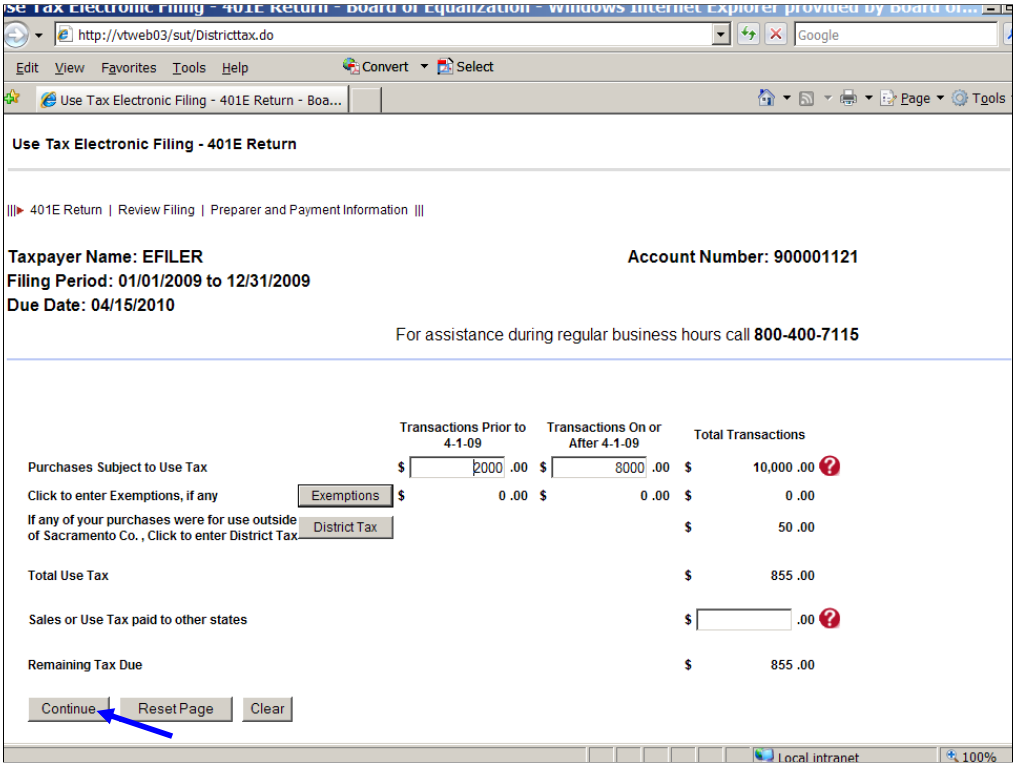


If you paid any sales or use tax to other states on purchases that are otherwise subject to California use tax, enter that amount here.

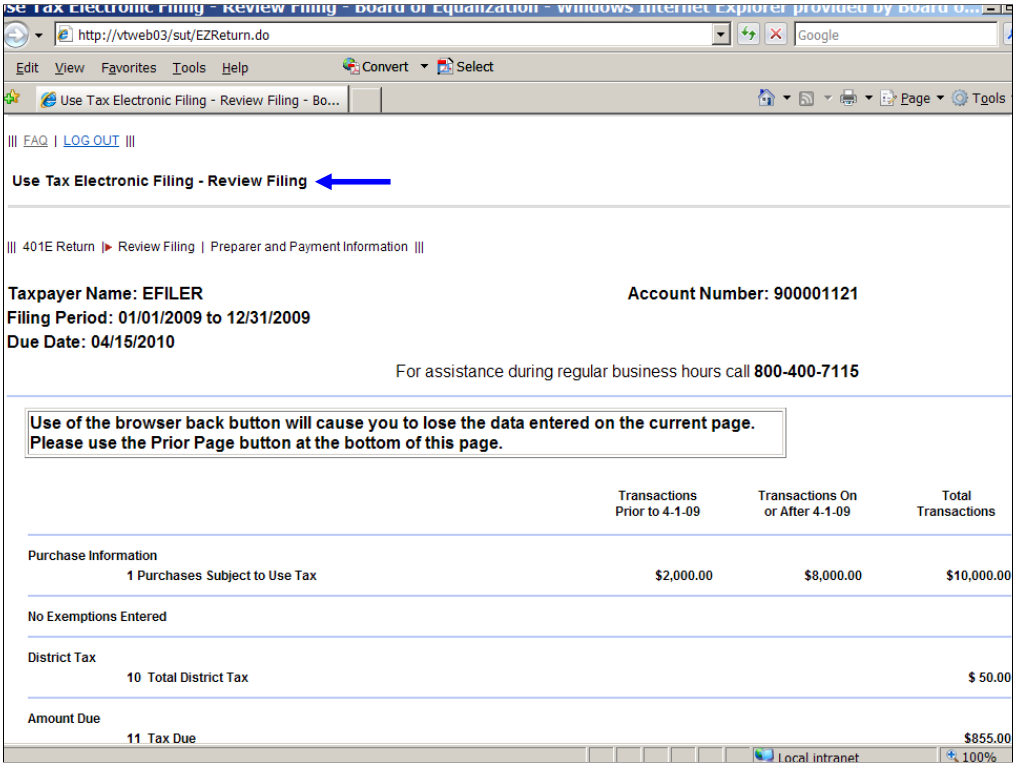
Again, click the question mark if you need additional help.



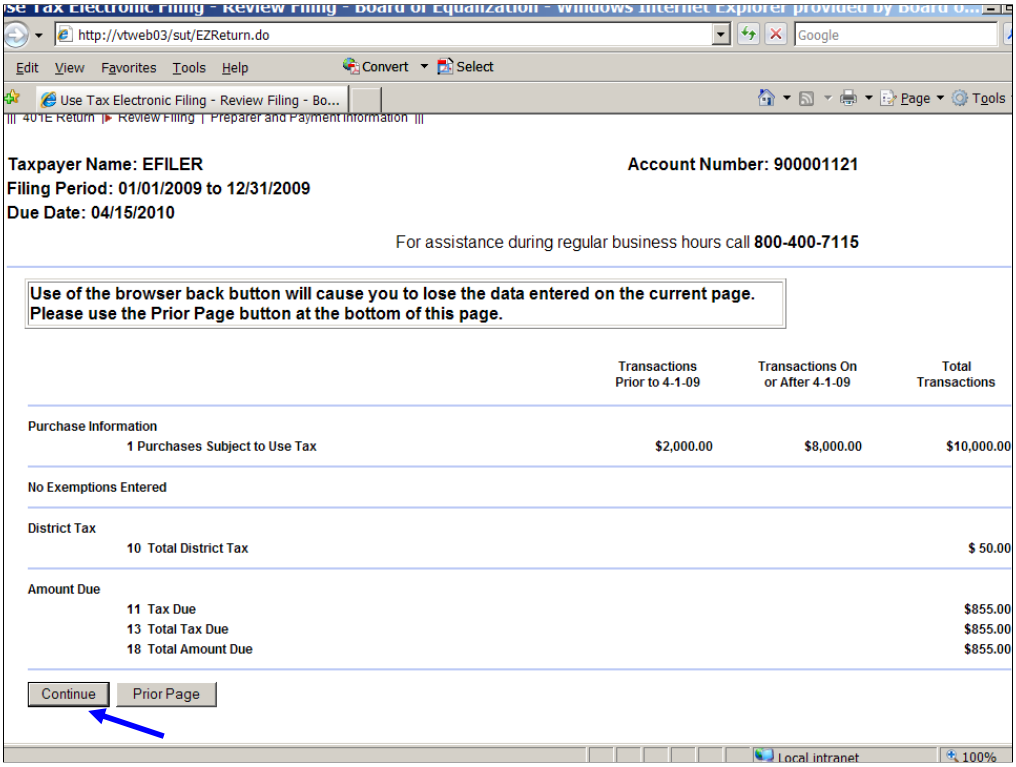
Your tax due has been calculated for you.



Once all your figures are entered, click “continue”



to go to a review page.



http://vtweb03/sut/EZReturn.do

Use Tax Electronic Filing - Review Filing - Bo...

401E Return | Review Filing | Preparer and Payment Information

Taxpayer Name: EFILER **Account Number: 900001121**
Filing Period: 01/01/2009 to 12/31/2009
Due Date: 04/15/2010

For assistance during regular business hours call **800-400-7115**

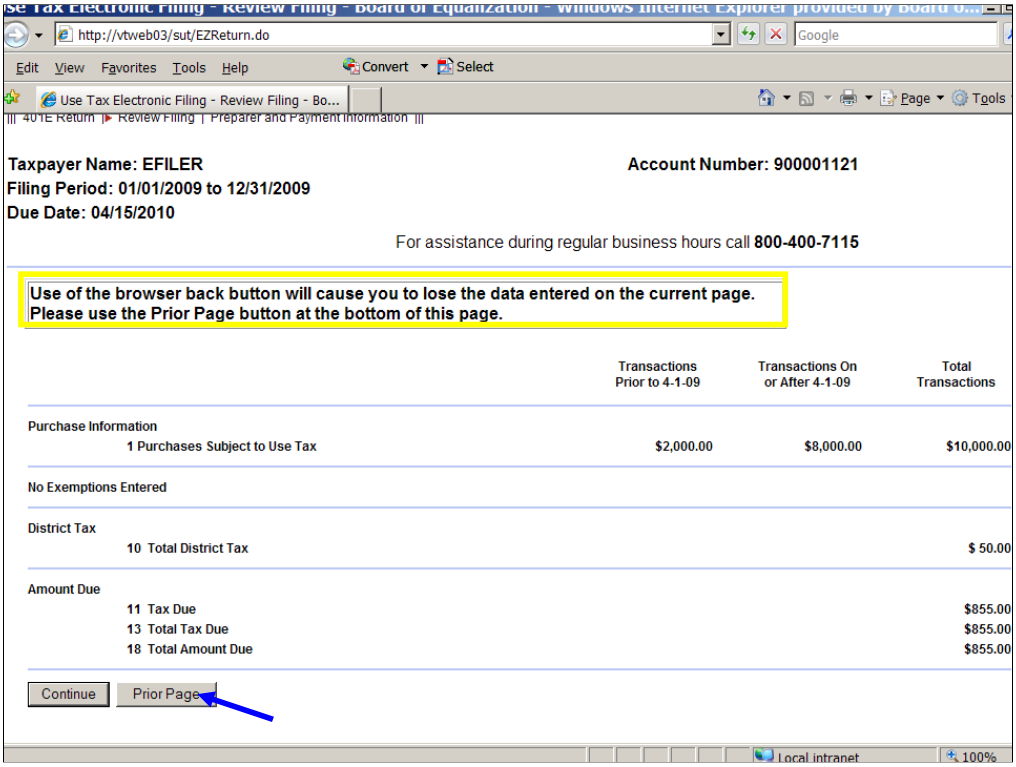
Use of the browser back button will cause you to lose the data entered on the current page.
Please use the Prior Page button at the bottom of this page.

	Transactions Prior to 4-1-09	Transactions On or After 4-1-09	Total Transactions
Purchase Information			
1 Purchases Subject to Use Tax	$2,000.00	$8,000.00	$10,000.00
No Exemptions Entered			
District Tax			
10 Total District Tax			$ 50.00
Amount Due			
11 Tax Due			$855.00
13 Total Tax Due			$855.00
18 Total Amount Due			$855.00

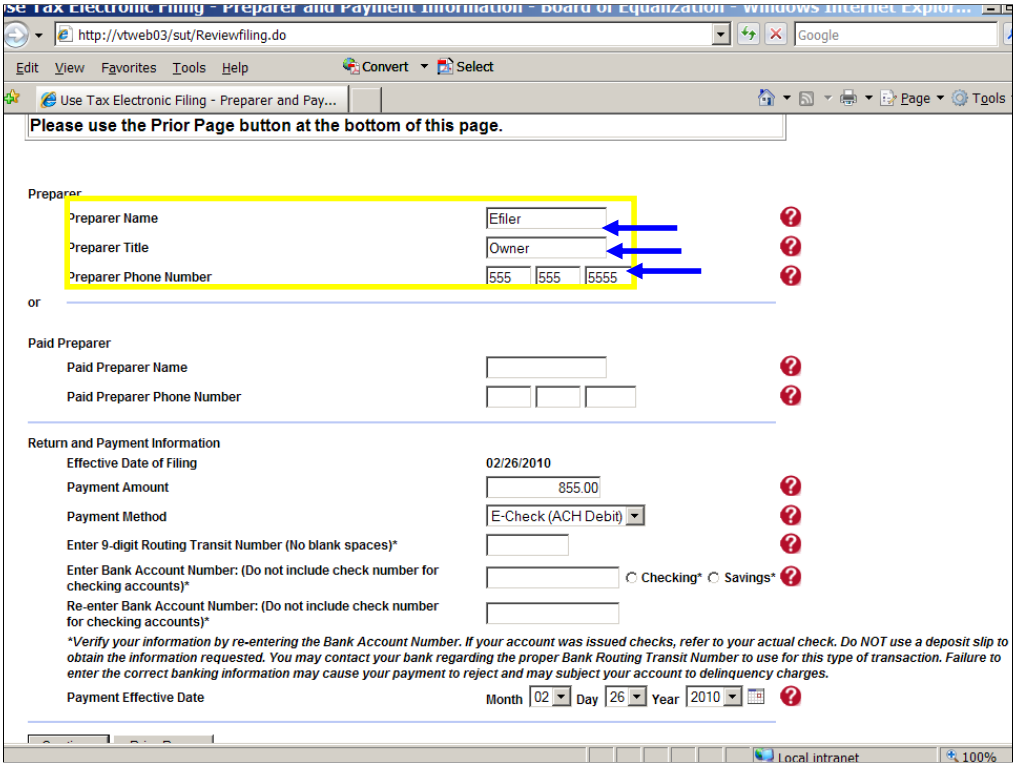
Continue Prior Page

Local intranet 100%

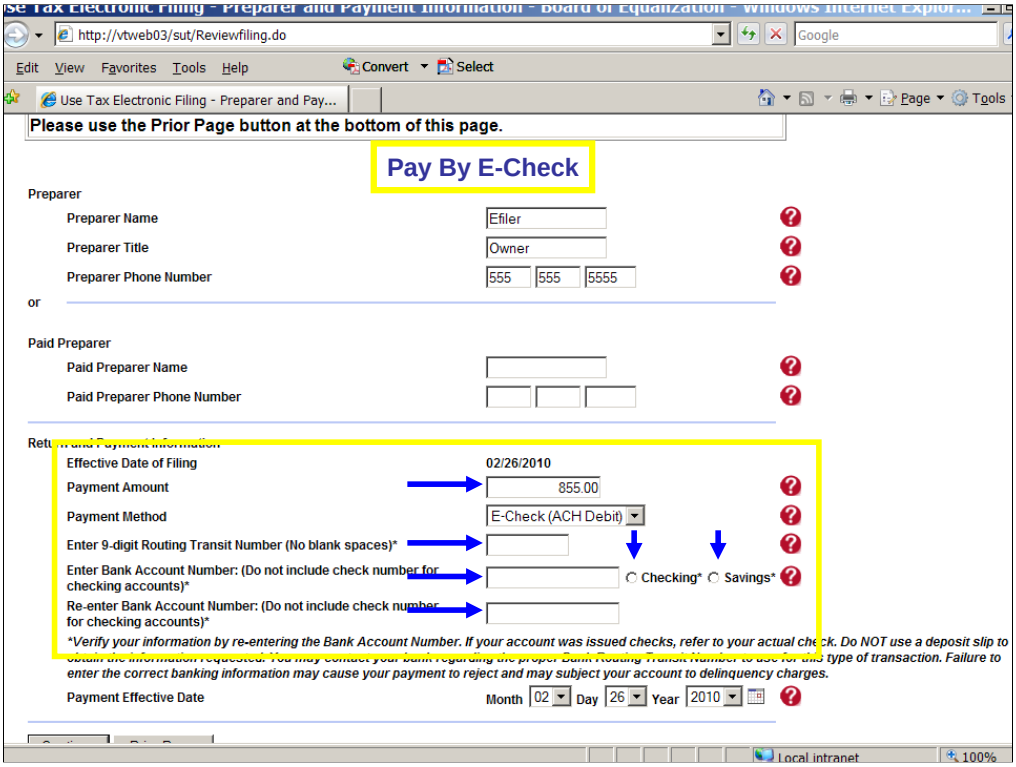
Please look at this page carefully, if everything looks correct click continue.



If you need to correct any information, click the “prior page” button at the bottom of this page to go back to the main page of the return. Do **not** use your internet browser Back button. This will cause you to lose the data you have entered.



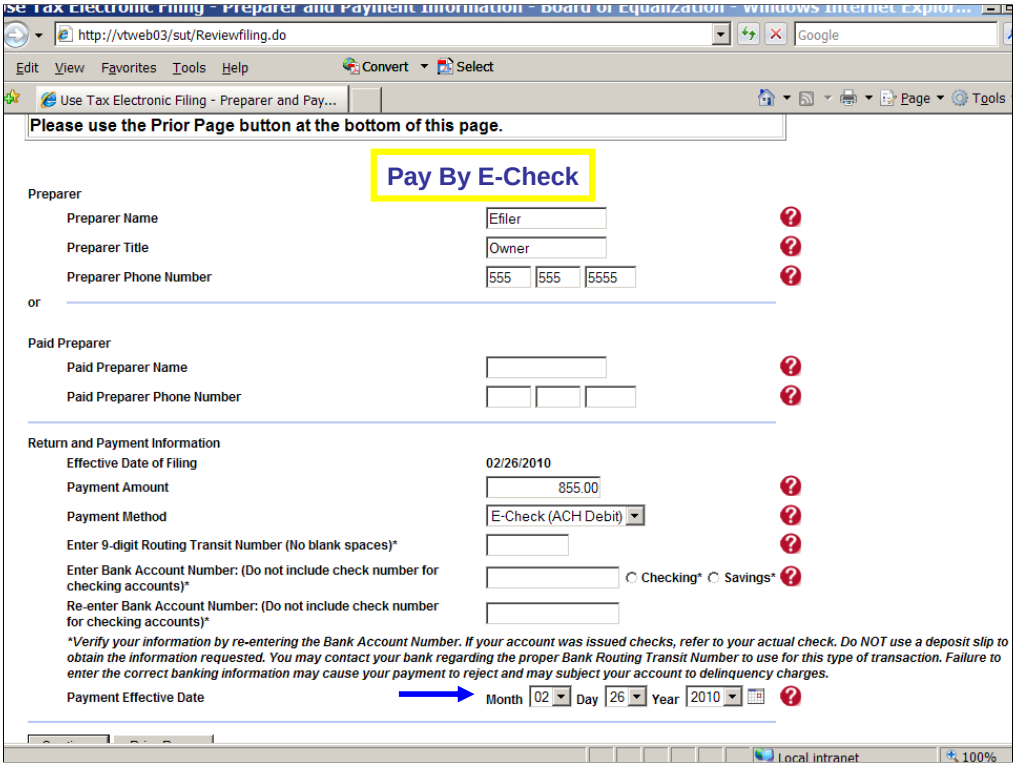
Now, you will enter the preparer information. As the person who prepared the return, enter your information here. You must complete one section or the other, but not both.



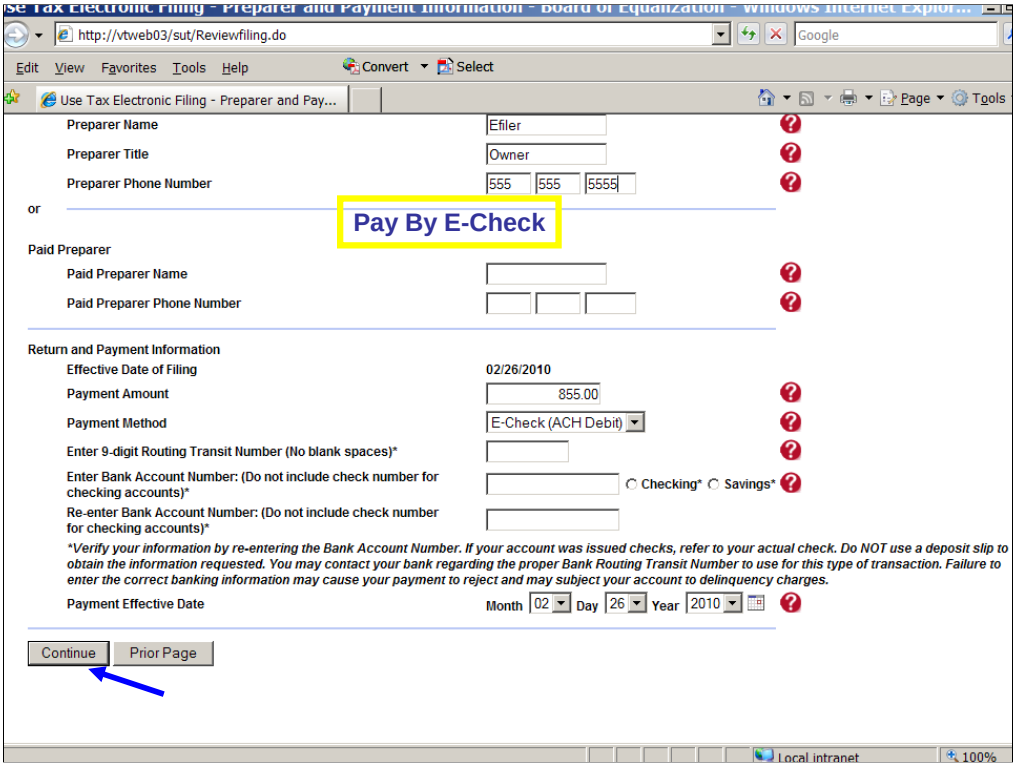
If you owe tax, you will enter your payment information here.

Three convenient payment methods are available.

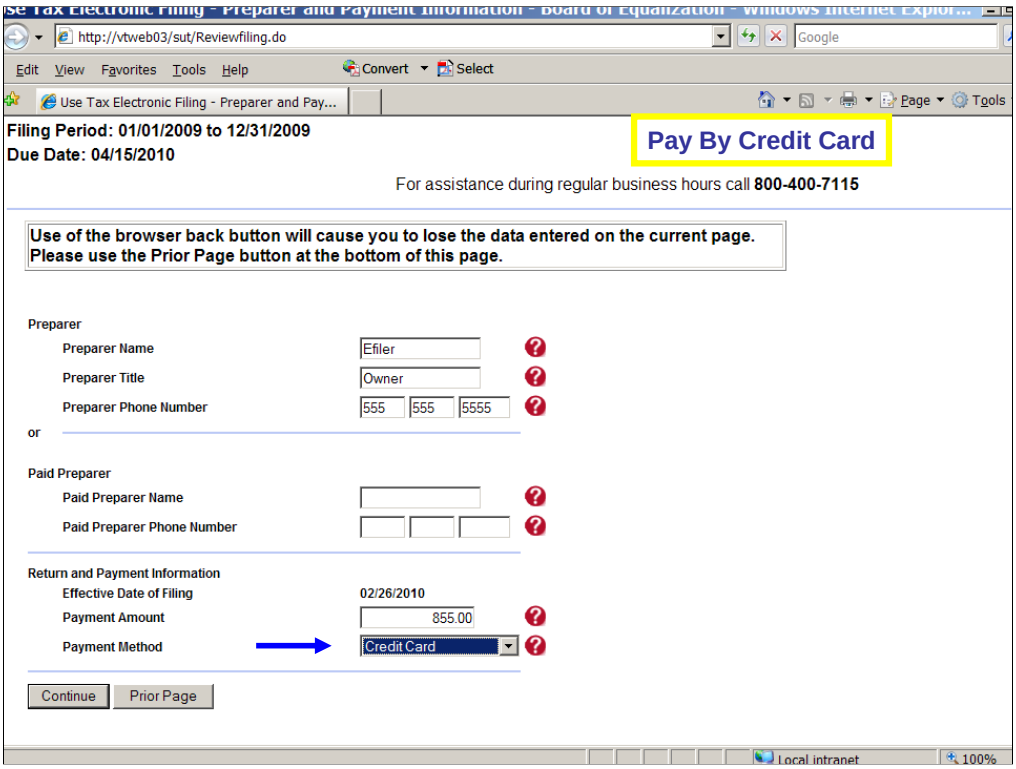
Selecting eCheck allows you to pay electronically for free. Simply enter your banking information



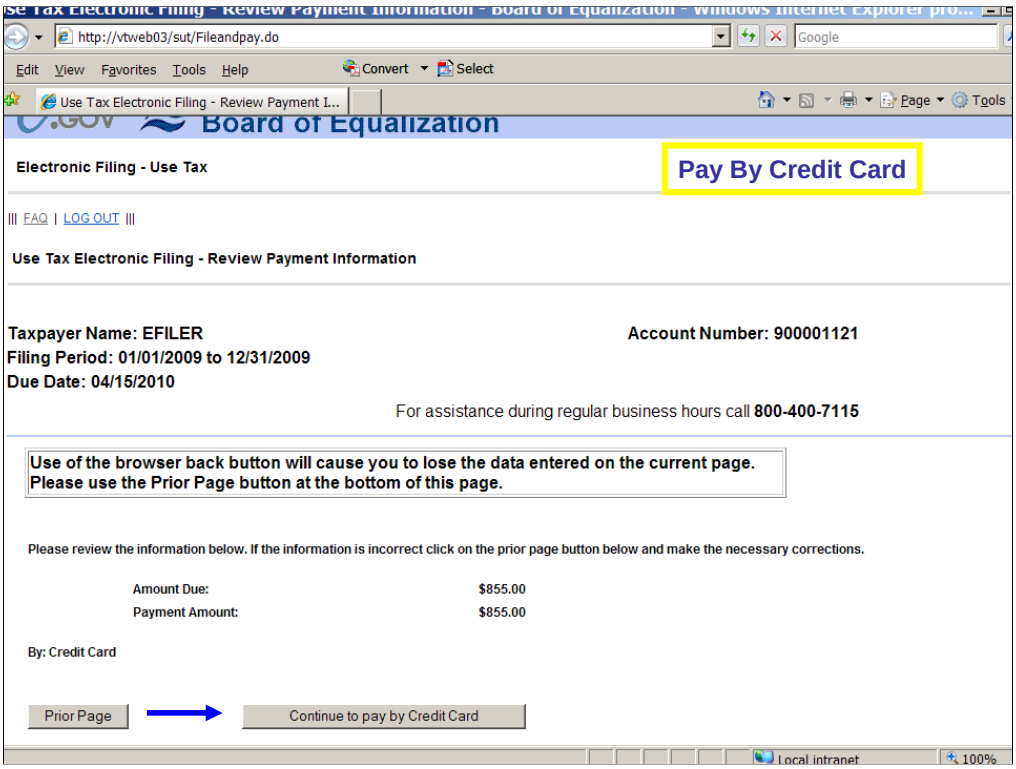
and select your payment date. You can select to make your payment on any date up to the due date of the return.



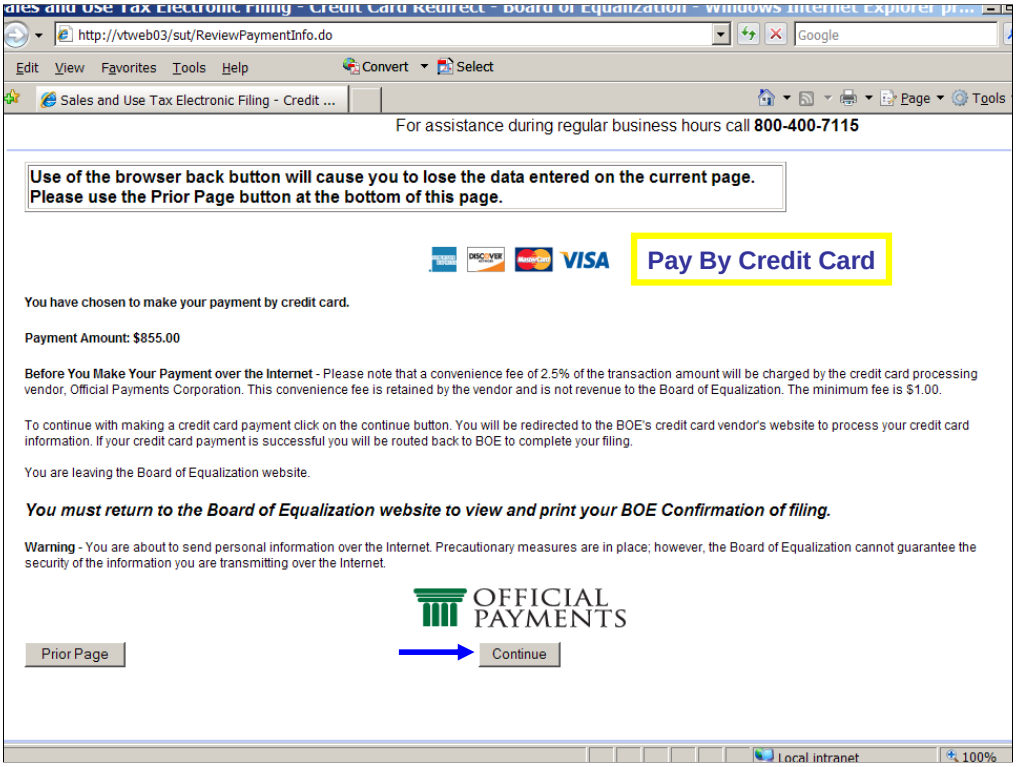
eCheck makes your entire transaction paperless and worry free.



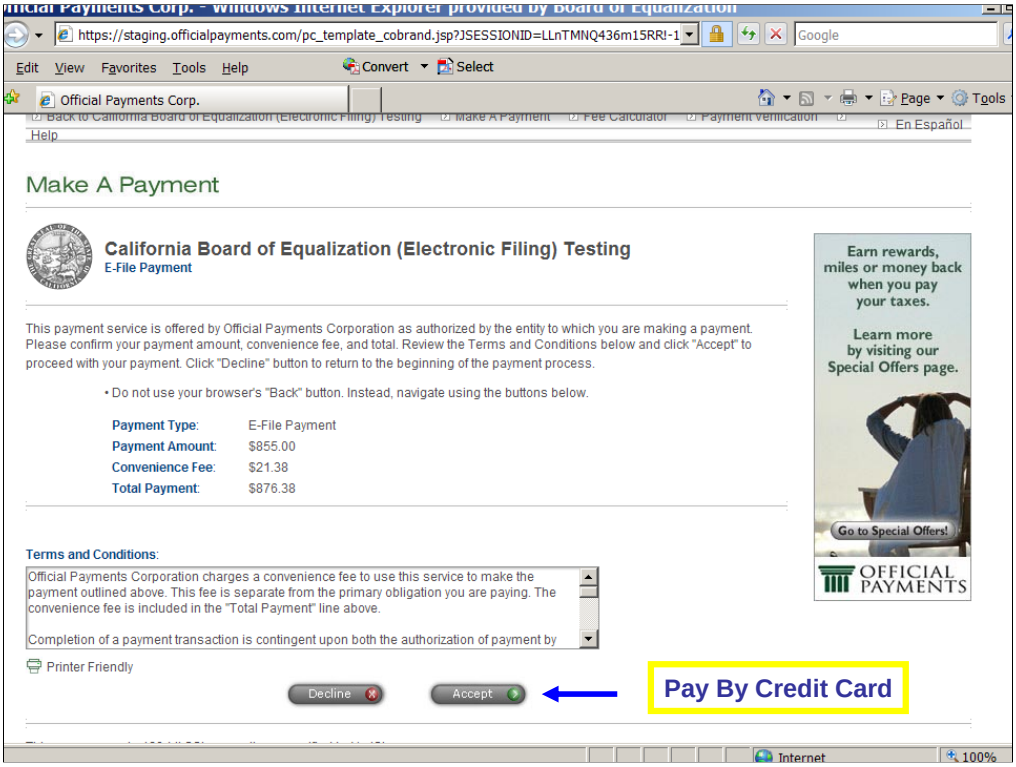
You may also pay by credit card.



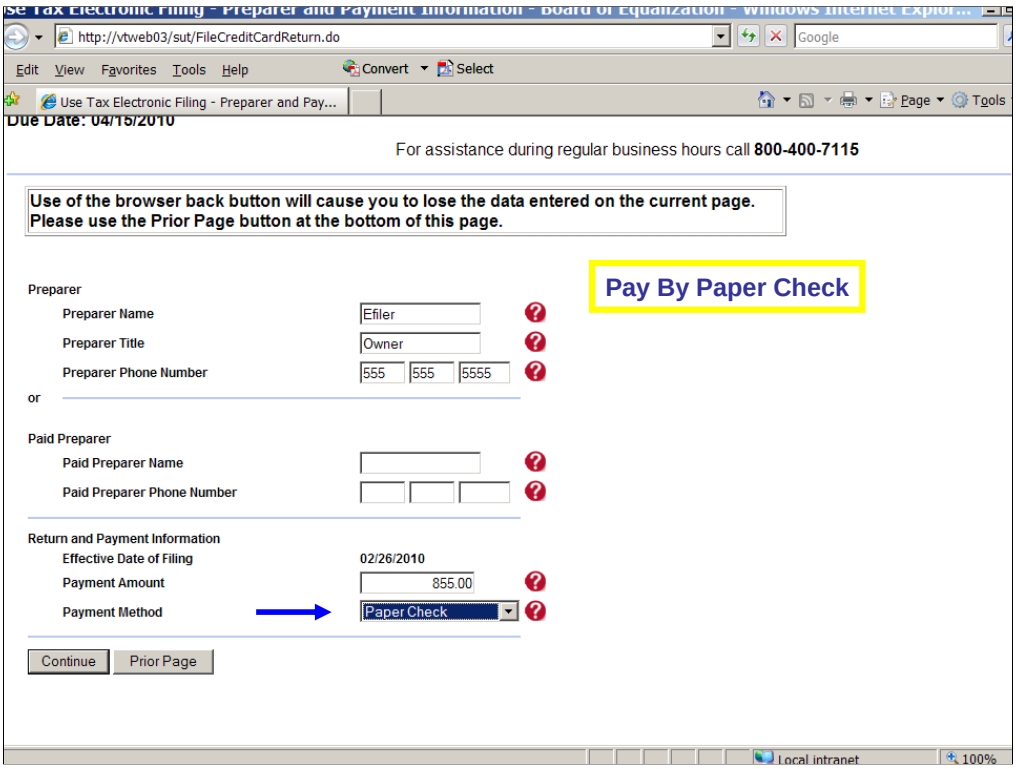
If you select to pay by credit card,



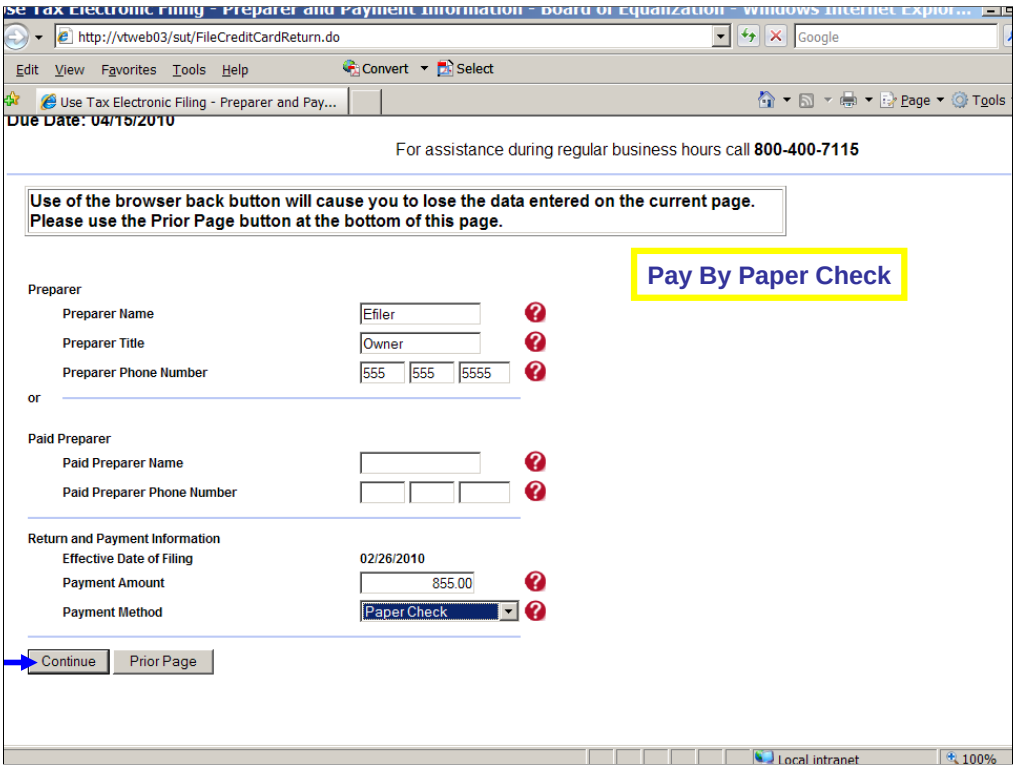
you will be directed to our credit card processor to make your credit card payment.



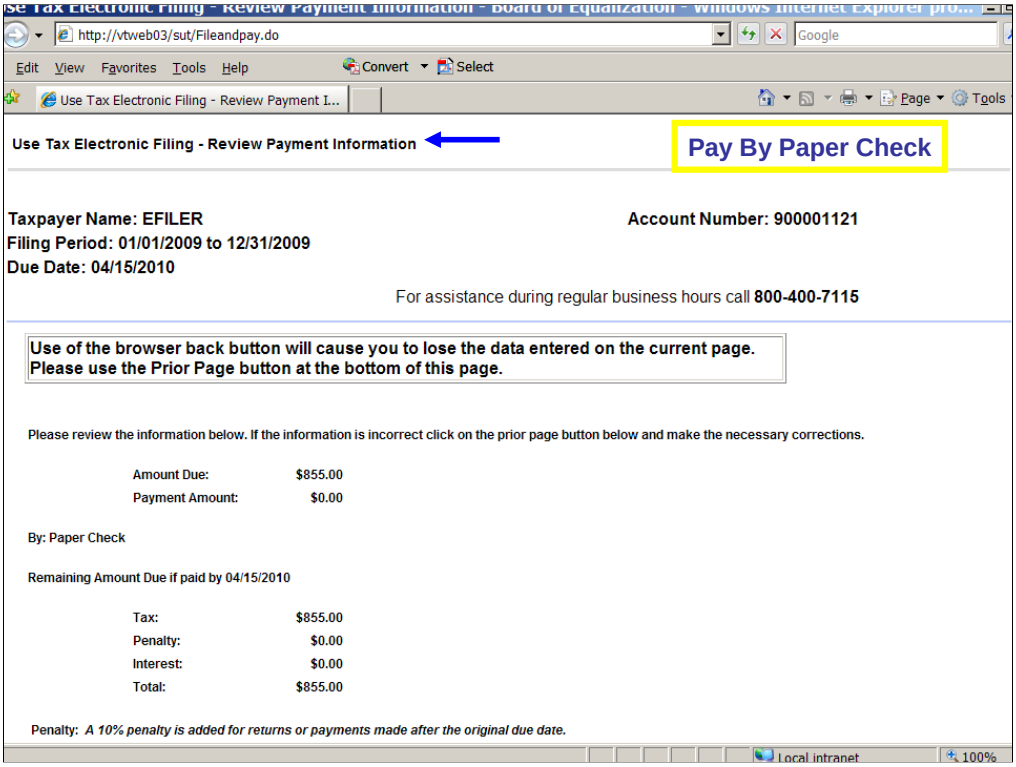
The processor charges a 2.5% convenience fee. This is not revenue to the BOE.



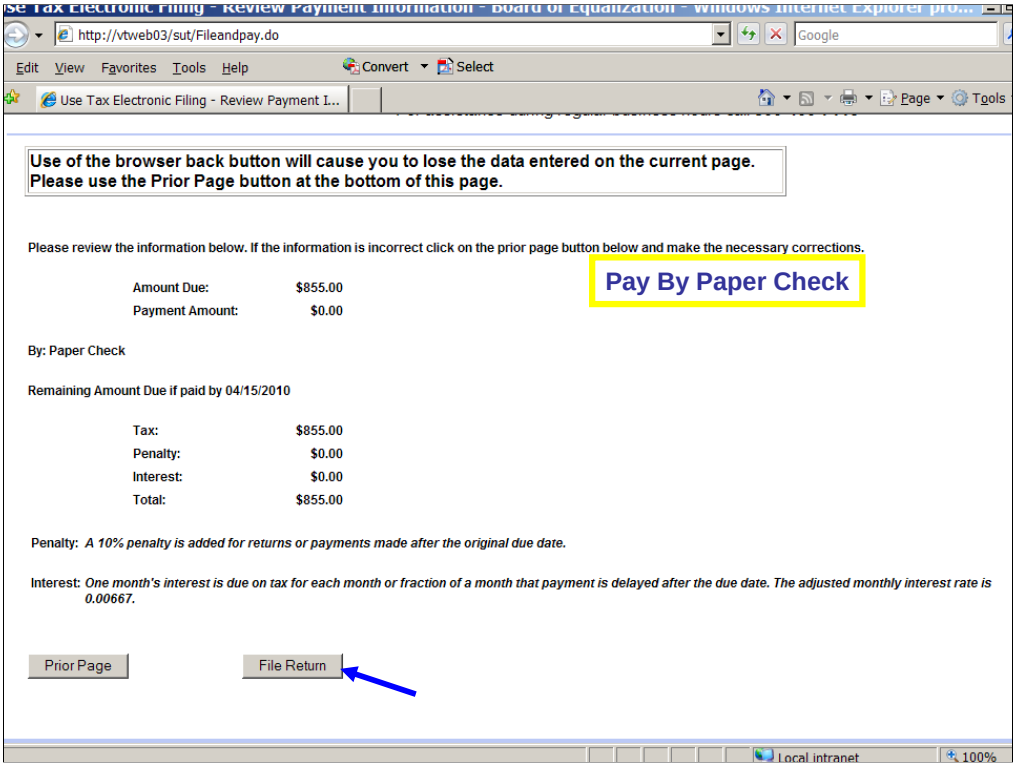
Finally, you can pay by paper check. At the end of the filing process, a payment voucher will print along with the confirmation page. Send in the voucher with your paper check to the address on the payment voucher.



Once you have completed your payment information click “continue” to go to a payment summary page.

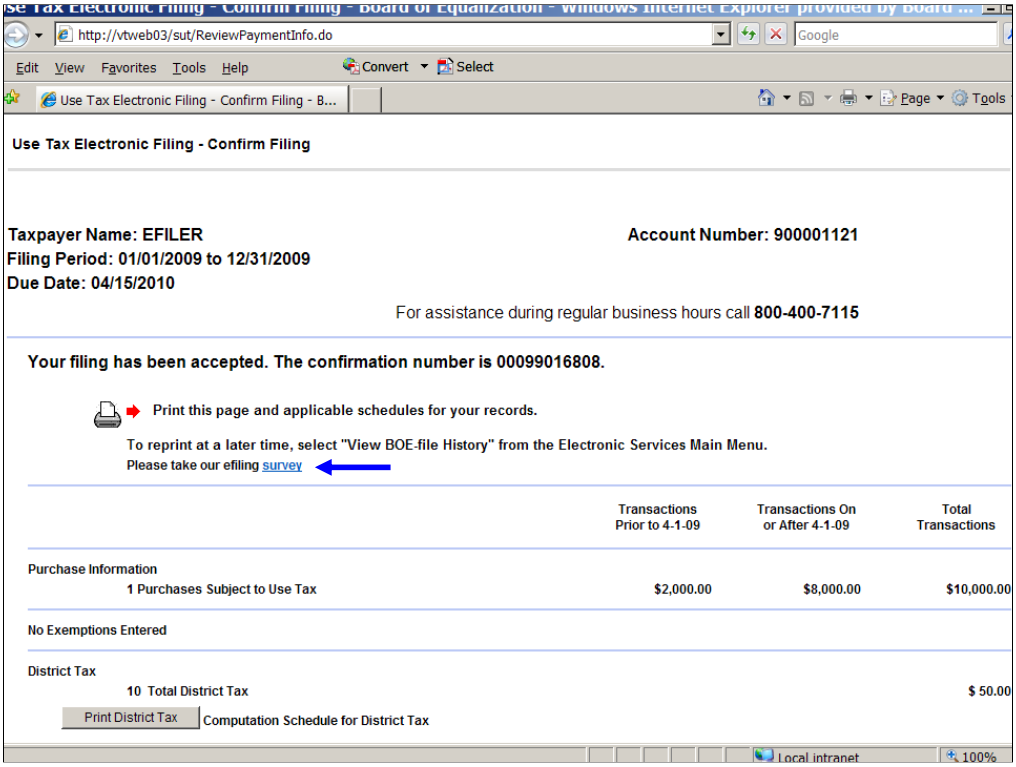


Review the information for accuracy



and click “file return” at the bottom of the page.

You are finished! You have now successfully completed filing your return with the California State Board of Equalization.



Use Tax Electronic Filing - Confirm Filing

Taxpayer Name: EFILER
Account Number: 900001121
Filing Period: 01/01/2009 to 12/31/2009
Due Date: 04/15/2010

For assistance during regular business hours call **800-400-7115**

Your filing has been accepted. The confirmation number is 00099016808.

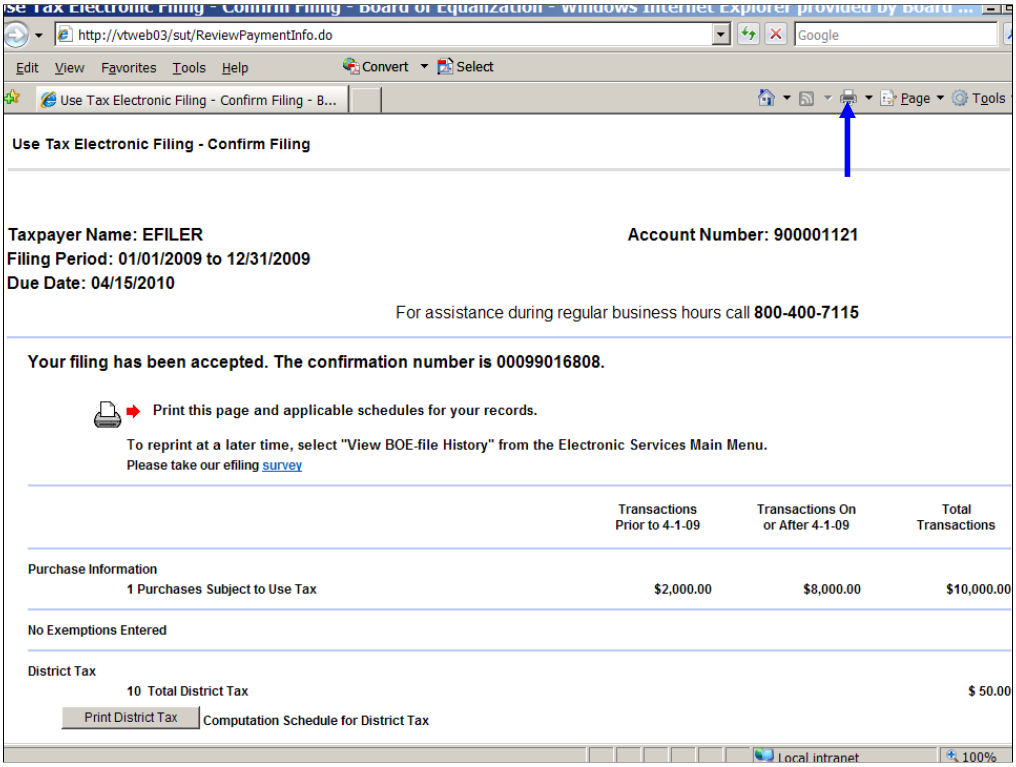
Print this page and applicable schedules for your records.

To reprint at a later time, select "View BOE-file History" from the Electronic Services Main Menu.
Please take our efiling survey

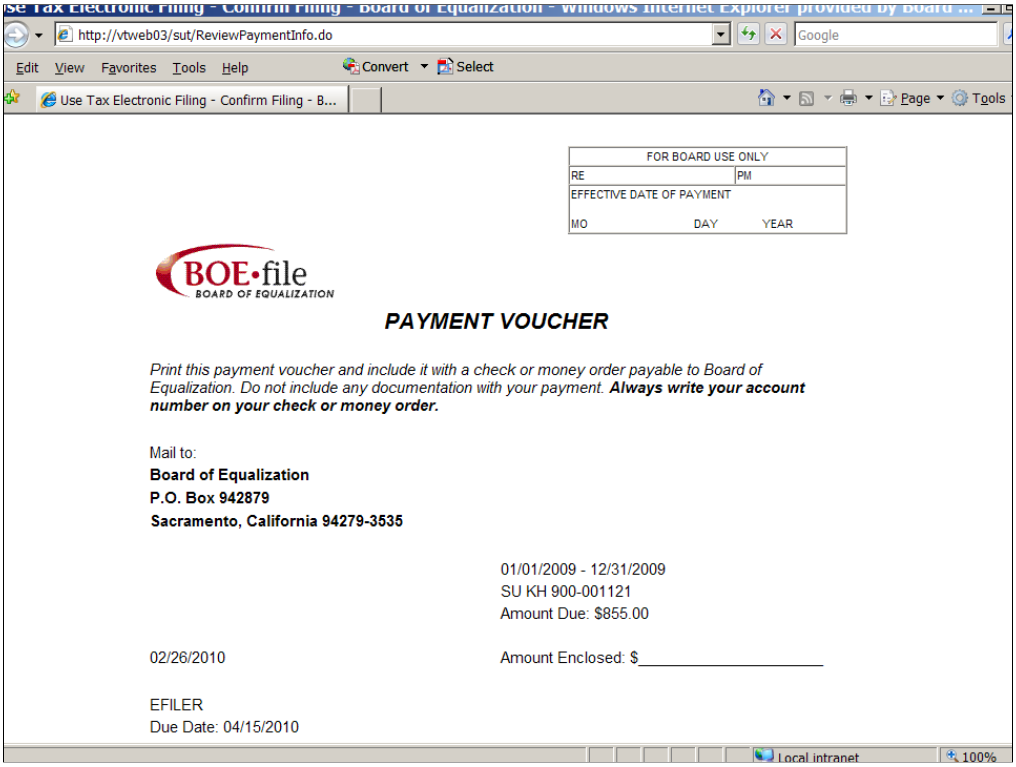
	Transactions Prior to 4-1-09	Transactions On or After 4-1-09	Total Transactions
Purchase Information			
1 Purchases Subject to Use Tax	$2,000.00	$8,000.00	$10,000.00
No Exemptions Entered			
District Tax			
10 Total District Tax			$ 50.00

Print District Tax | Computation Schedule for District Tax

If you have a minute, we would appreciate your taking the efile survey to let us know what you think of this efiling process.



Print this confirmation page by clicking on the printer icon. This confirmation page is for your records.



http://vtweb03/sut/ReviewPaymentInfo.do

Use Tax Electronic Filing - Confirm Filing - B...

FOR BOARD USE ONLY	
RE	PM
EFFECTIVE DATE OF PAYMENT	
MO DAY YEAR	

BOE•file
BOARD OF EQUALIZATION

PAYMENT VOUCHER

Print this payment voucher and include it with a check or money order payable to Board of Equalization. Do not include any documentation with your payment. ***Always write your account number on your check or money order.***

Mail to:
Board of Equalization
P.O. Box 942879
Sacramento, California 94279-3535

01/01/2009 - 12/31/2009
SU KH 900-001121
Amount Due: $855.00

02/26/2010

Amount Enclosed: $_____

EFILER
Due Date: 04/15/2010

If you selected to pay by paper check, remember to send in your check with the payment voucher that prints immediately following the confirmation page.

Thanks for viewing this training video. You are now ready to efile your tax return with BOE-file, the Board of Equalizations free efiling system.

Thanks for viewing this training video. You are now ready to efile your tax return with BOE-file, the Board of Equalizations free efiling system.