

# eFile Guide

[www.boe.ca.gov](http://www.boe.ca.gov)



## eFiling

Good for you

Good for California



Publication 159  
January 2011

# Filing and Paying Taxes Was Never Easier

Electronic filing (efiling) is the Board of Equalization's (BOE) method for filing sales and use tax returns and prepayments. The BOE provides a free efiling option, BOE-file.

## What are the benefits of efilng?

### For you...

#### It's Convenient

- File anytime and anywhere you have access to the Internet
- Eliminate trips to the post office
- Schedule payments up to the due date

#### It's Fast

- File and make payment in one easy transaction
- Immediate confirmation of filing

#### It's Easy

- Automatic calculations are done for you

#### It's Secure

- The latest hardware and software security is in place

#### It's FREE

- No cost for filing
- No cost for postage

## For California...

#### It's Efficient

- Requires less processing
- Reduces government costs

#### It's Environmentally Friendly

- Eliminates paper
- Helps California go green

## What is BOE-file?

**BOE-file is the BOE's free efilng system which features:**

- Two easy ways to login
- Three convenient payment options
- File early, pay later option
- Manage another account via our "Link an Account" feature
- History of prior efiled returns
- Email reminders of approaching tax due dates and important tax information
- Online help
- Live assistance during business hours
- Direct Transmit Program\*

## Who can efile?

Nearly all sales and use tax accounts are eligible to efile. Check our website for eligibility.

## What do I need to get started?

- Express Login Code or eClient User ID and Password
- Account number (for example, seller's permit number, consumer use tax account number)
- Sales and deduction information for the filing period
- Purchase information (for use tax)
- Bank account information or credit card number

\*If you would like to efile your return without rekeying your tax amounts in the BOE-file system, please visit our [website](#) under "eFile by Direct Transmit" and select "Direct Transmit Program" for more information.



# 1 Getting Started with BOE-file

You have two convenient options to login with BOE-file

## eClient Registration and Login

Registering as an eClient allows you to:

- Login with your own User ID and Password
- View prior efiled returns
- Receive email due date reminders
- Change your business email address online

## To begin:

- Go to [www.boe.ca.gov](http://www.boe.ca.gov)
- Click on eServices
- Choose "Register as an eClient"

## Supply the following information:

- Account number (seller's permit number, consumer use tax account number)
- Your name (as registered with the BOE, for example, John Taxpayer)
- Express Login Code (your unique eight character code, for example, a123456e)

## Create your login information

- User ID
- Password

Login to BOE-file with your User ID and Password

## Express Login

Choose this option to go straight to filing your return or prepayment with no eClient registration required. All you need to login is your account number and Express Login Code.

## Can someone else efile for me?

You have two choices if you would like someone else to efile for you.

**Express Login**—Provide your account number and your Express Login Code to your tax professional, accountant, or employee.

**eClient**—Call 800-400-7115 to add an authorized eClient to your account or complete BOE-91-B, *Taxpayer Authorization for Tax Preparer to Electronically File Tax Returns*.

# 2 Filing Your Return or Prepayment

Completing your return has never been easier!

- Read and accept the "Declaration of Intent to File"
- Enter your return/prepayment information
- Verify the information on the "Review Filing" page
- Enter the preparer information

# 3 Making Your Payment

Three easy and convenient payment options are available!

## eCheck (ACH Debit)

Preferred Method

File your return and make payment in one easy transaction.

- Verify or enter your banking information (bank account number and bank routing number.)
- Select a payment date. Payments may be held for any banking day you select up to the tax due date.

## Credit Card Payment

You can pay by credit card through a third-party vendor.

- American Express, Discover, MasterCard and Visa cards are accepted.



American Express®, Discover® Network, MasterCard®, or Visa®

*A convenience fee of 2.5 percent of the transaction amount will be charged by the third-party vendor. This fee is not revenue to the BOE.*

- Return to BOE-file after making your credit card payment to complete your return filing.

## Paper Check

Choose this option to print out a payment voucher to mail in with your check.

- Print the confirmation page and payment voucher. *This voucher is only available immediately after filing your return.*
- Mail in your check with the payment voucher.

# 4 Confirming Your Filing

No waiting to see if your return was accepted!


- Receive your confirmation page immediately upon filing.
- Print this page for your records.

That's It! You're Done!

## Helpful Hints

- Do not use your browser's Back or Forward buttons while efileing (use only the buttons inside the BOE-file system).
- When entering numbers into the efile system, do not use commas, periods, or dashes—use numbers only.
- Print your confirmation page(s) for your records.
- When paying by paper check, the payment voucher will print after the confirmation page. You will only have one opportunity to print the voucher.
- Sign up to receive due date reminders and important tax updates via email.
- Keep your business email and personal email address updated. You can maintain your email addresses when you login as an eClient.

## eFile Assistance

- Visit the [BOE website](#) for more efile information, [online eFile Video Tutorials](#), and a complete list of frequently asked questions.
- Click on the  in the BOE-file system for additional information at any step.
- Call 800-400-7115 during regular business hours for live efile assistance.



# Frequently Asked Questions

**Q Where can I find my Express Login Code?**

**A** Your Express Login Code is an 8-character code (for example, a123456e) found on correspondence you receive from the BOE.

You can also call our Taxpayer Information Section at 800-400-7115.

**Q How can I receive reminders of approaching tax due dates?**

**A** Reminders of approaching tax due dates are emailed to your business email address. You can maintain your business email address as a registered eClient.

You can also receive sales and use tax due date reminders when you sign up for BOE Updates.

**Q When is my return available to efile?**

**A** Your electronic return is available to efile on the BOE-file system the day after the end of the period. For example, if the period ends on December 31st, the return is available to efile on January 1st.

**Q What is the difference between efileing and Electronic Funds Transfer (EFT)?**

**A** Efileing is a method to file returns/prepayments and pay amounts due over the Internet. EFT is a method to make an electronic payment.

**Q How can I reprint my confirmation page?**

**A** Registered eClients can reprint a confirmation page. After logging into BOE-file, select "View BOE-file History" from the "Electronic Services Main Menu". You will be able to view and reprint all the returns or prepayments you have efiled through BOE-file.

# eFiling

## Good for You, Good for California

The BOE processes over three million sales and use tax returns annually. Efiling allows BOE to create efficiencies, and generate cost savings and, at the same time, provide taxpayers an easy, quick and accurate method to file a return.

### **Additional Online Services and Resources**

Visit our [website](#) to find other helpful tools and information:

- Seller's permit verification
- District tax rates
- Forms and publications
- Tax laws
- Calendars for seminars and events
- Tutorials
- Interest Calculator
- Credit Card Payments
- Direct Transmit Program

**Record your information here for future use:**

User ID \_\_\_\_\_

Password \_\_\_\_\_

Account # \_\_\_\_\_

Express Login Code \_\_\_\_\_