FileLocal™ General Q and A

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How do I set up a business account?

From the FileLocal Login screen, click CREATE BUSINESS ACCOUNT and follow the onscreen instructions. You may want to review the Taxpayer QuickStart Guide for step-by-step instructions.

How do I add business locations?

Select ***Account Center*** on the home page, and then select ***Business Locations*** This will display the ***Location Information*** screen where you can add locations.

How do I update my business information on FileLocal?

If you navigate to the ***My Account*** screen by selecting ***Account Information*** on the home page, you will be able to edit your corporate information on this page. ***My Account*** also allows you to add and edit business information for individual locations.

Why am I unable to print my license?

There are several reasons you might not be able to print your license:

1. **Your license is not yet approved by the City.** If you have recently applied for a license, the City may still be in the process of reviewing your application. When your City Account Number shows as "Applied For," you cannot yet print your license. Once your application is approved, the City will assign a City Account Number. At that point, you will be able to print your license.

2. **Your license is expired and due for renewal.** If your license is expired, you cannot print it from the Portal. In order to print your license, check the Activity Center and pay for your renewal. Once you've processed the renewal, you will be able to print.

3. **You haven't yet linked your license**. If you have an existing license when you set up your FileLocal account, you must link your license before you can print. Click the link option on the home page, in My Account, or on the Edit Location screen. Select

the City and enter the City Account Number. Once the City verifies your City Account Number, you will be able to print your license.

4. **You renewed your license outside the Portal.** If you have a renewal loaded in the Portal (check the Activity Center) but you choose to pay it through the mail or in person, you will not be able to print your license through FileLocal.

Important Note: Steps for Tacoma taxpayers:

1. Under the GBL and Renewals section, find the current year license renewal and select CONTINUE.
2. A message appears stating license was paid, click OK.
3. Return to the License section and select PRINT.

How should I set up an account if I am a preparer, filing for many different companies?

FileLocal has a special user account called a Preparer Account. You can set up a Preparer Account by clicking CREATE TAX PREPARER ACCOUNT on the FileLocal Login screen. Once you set up your Preparer Account, you can add your clients, whether or not the client has already set up their own account in FileLocal. When your client authorizes you to manage their account, you can log in using your credentials and file taxes for that client. Having a Preparer Account lets you have a single login to access your entire client list.

How can I file tax forms for multiple companies?

If the companies share the same Federal Tax ID (FEIN) and the same Primary UBI (UBI-9), you should set up one business account with the companies listed as separate locations.

If the companies do not share the same Federal Tax ID (FEIN) and the same Primary UBI (UBI-9), then the companies should be set up under separate business accounts. Then you can set up a Preparer Account to manage those separate companies. As a preparer, you can request to manage existing accounts (accounts already set up in FileLocal), or you can set up your clients' accounts after you log into FileLocal. A Preparer Account lets you log in under a single set of credentials to manage multiple companies' accounts.

For more information, see the following FAQ topics:
How do I set up a business account?
How should I file tax forms for a business with multiple locations?
How do I add business locations?
How should I set up an account if I am a preparer, filing for many different companies?

Why can't I change my UBI?

Once you have finished your account setup, you will not be able to change your UBI number on FileLocal. Because your Primary UBI (UBI-9) is connected to all your locations and to all the FileLocal participating cities that you do business with, changing the UBI can have far-reaching implications, especially since we use this number to identify your business. For this reason, you need to contact the appropriate city or cities to request your update to your UBI number.

What is a UBI?

A UBI (Unified Business Identifier) is a 16-digit number issued by Washington State Business License Services. The State requires businesses that meet a certain threshold to register the business and apply for a UBI.

FileLocal uses the UBI to identify your business locations, so you need a UBI for each business location in order to use FileLocal. You can apply for a UBI even if you do not meet the State's thresholds using the links provided at the end of this article.
The UBI has 3 parts:

- The Primary UBI is a 9-digit number that identifies the taxpaying entity as a whole, regardless of the number of businesses or locations.
- The Business ID is a 3-digit number that represents the business. In most cases this will be 001, but it is possible to have multiple businesses represented until the Primary UBI, so the Business ID could be 002, etc.
- The Location ID is a 4-digit number that represents a location of the business.

Since each location of your business should be registered with the State, each location should have a unique 16-digit UBI, comprised of a common Primary UBI (first 9 digits) and then its own Business ID and Location ID combination.
Here are the State's criteria for requiring a UBI:
You need a UBI if you meet 1 or more of the following criteria:

- Your business grosses $12,000 or more per year.
- You're doing business using a name other than your full legal name.
- You plan to hire employees within the next 90 days.
- You sell a product or provide a service that is taxable. To find out more about what products or services are taxable, see the Department of Revenue's Business tax guide, or call them at 360-705-6741 or 360-705-6705.
- Your business has specialty licenses available through the Business Licensing Service.
- Your business is a Washington State corporation, LLC, or limited partnership.
- If you are opening a business as a Corporation, Limited Liability Company (LLC) or Limited Partnership (LP), you must register with the Secretary of State to obtain the UBI number for your legal entity. You will then file with Business Licensing Service for the state business license.

Sec of State/Corporations Division http://www.sos.wa.gov/corps/
If you plan to operate as a Sole Proprietor or as a General Partnership, or have already registered your Corporation or LLC with the Secretary of State, you must then file your business with the Business Licensing Service http://bls.dor.wa.gov/
You may also want to view:
Washington State Small Business Guide http://www.ora.wa.gov/business.asp
Washington Secretary of Roadmap to Register and License your Business in Washington State https://dor.wa.gov/sites/default/files/legacy/Docs/Pubs/BusReg/Roadmap.pdf

How do I find my Business ID and Location ID numbers for my UBI?

You can locate these numbers at the Dept of Revenue Business License Look Up at www.licenselookup.wa.gov (Option 1: Visit dor.wa.gov and click "look up a business"). You can search by your 9 digit Primary UBI or by your Business or Trade Name

- What if I have a physical location in this city, but it hasn't been registered with BLS?

State law requires that you have a license for each physical address where your business is located. If you do not have a business license for this city, then you need to apply for a state license for that location. You can apply at business.wa.gov/BLS

- What if I don’t have a physical location in this city?

Use the Business ID and Location id from your existing license.

How do I determine if I need a UBI?

Review the eligibility requirements listed in What is a UBI? If your business meets one or more of those criteria, you must obtain a UBI before creating a FileLocal account.

- Once you obtain your UBI, return to FileLocal and complete your account setup.
- If you're forming a corporation, LLC, or limited partnership, register first with the Secretary of State.
- Sole proprietors and general partnerships should apply through the Business Licensing Service.

Can I make a partial payment?

No. You must pay in full for each tax form you file.

Can I file a tax form without making a payment?

Only if the tax form calculates a zero value. If the tax form calculates a positive remittance value, you must make a payment for that full amount during the payment process or your tax form will not be filed to the city.

Can I save a tax form and continue filing at a later time?

Yes. To save a tax form, click the Save and Continue button at the bottom of the tax form screen. To continue the saved tax form, click My Forms->Activity Center. Select the filing period from the drop-down menu. Click the Continue button in the row of the tax form.

What methods of payment are available on FileLocal?

There are two methods of payment available. ACH Debit payments are payments made from your checking or savings bank account. When you provide your bank account information, the city pulls the funds from your bank account. This payment method is similar to writing an electronic check. In addition, Credit Card payments (Visa, Mastercard and Discover) may be made using a credit or debit card.

View Statement - it shows I have a balance, why can't I pay from this screen?

Your View Statement balance may reflect both items that can and items that cannot be paid via FileLocal. Currently, only General Business License Applications and Renewals, Business and Occupational Tax, and a few City-sepcific taxes can be paid using FileLocal. To make payments on other items, please contact the city directly.

I filed my tax form and made a payment, but the money has not been drafted from my bank account. Why?

There are cutoff periods for when payments are deducted based on the day/time you are filing and paying for your tax form. If you are filing and paying:

After Monday 5pm thru Tuesday 4:59PM PST will be withdrawn at midnight Tuesday night PST.
After Tuesday 5pm PST thru Wednesday 4:59PM PST will be withdrawn at midnight Wednesday night PST.
After Wednesday 5pm PST thru Thursday 4:59PM PST will be withdrawn at midnight Thursday night PST.
After Thursday 5pm PST thru Friday 4:59PM PST will be withdrawn at midnight Sunday night PST.
After Friday 5pm PST thru Monday 4:59 PM PST will be withdrawn at midnight Monday night PST.

I need more information about fees.

There are two fees associated with using FileLocal:

(1) The **FileLocal User fee** is $4.00 for each City you are paying now. If you have multiple forms to pay, we recommend you file them all at one time so that you don't have to pay the user fee more than once per filing period. The FileLocal User Fee is retained by the FileLocal Agency to help offset the cost of maintaining the FileLocal Portal. which includes providing services to taxpayer and participating cities, making updates to functionality, and maintaining vendor relationships. This fee is NOT paid to or retained by any individual city. These funds do not pass through City hands. The FileLocal fee will show on your bank or card statement as a separate charge.

(2) There is a **service fee** charged by KUBRA, our secure third-party payment processor. This fee is $1 per City for ACH Debit transactions, or 2.49% for Debit/Credit Card transactions. The service fee is calculated by and retained by the payment processor. These funds do not pass through the City or Agency hands. The service fee will show on your bank or card statement as a separate charge.

Both the FileLocal user fee and the KUBRA payment processor service fees are non-refundable.

Click here for further information about Originator IDs.

What is an Originator ID?
An Originator ID or Company ID is a number that identifies a particular bank or other financial institution for purposes of electronic transactions. It works almost like a password for your bank account. It tells your bank you know the originating company (company where the transaction came from) for the money being taken out of your bank account. If you give the number to your bank, it means that you know that the money is going to be taken out of your account by the financial institution the number belongs to. When the transaction comes through your account with this Originator ID, your bank knows that you know about it because you gave them the ID in advance.

Why do I need it?
Some banks require the Originator ID for all online transactions. This is a fraud prevention measure to make sure that someone who might have access to your bank account and routing information cannot illegally withdraw funds from your bank account. If a transaction comes to your account and you haven't given your bank the Originator ID for the financial institution making the withdrawal, then your bank will block the transaction. That protects you!

How do I know if I need one?
Just contact your bank and ask them if they use an Originating Company ID number to verify electronic withdrawals from your bank account. If your bank says no, then you don't need the number.

Do I have to do this every time I file?
No! Once you provide the number to your bank, you're done. The Originator ID for a financial institution rarely ever changes. If the Originator ID changes for us, we'll tell you about it as soon as we know.

What if I've already filed?

If you submit your transaction without checking with your bank on whether or not they need an Originator ID, your transaction may be rejected. Just contact your bank to find out.

Where can I find a list of Originator IDs?
You will need to provide your bank with the Originator ID for FileLocal 0000007041 as well as the Originator ID for Chase PaymenTech 1020401225.

What if I have more questions?
Contact your bank, or Technical Support.

If a preparer needs to reassign access to another employee, how is this done?

An account can only have one preparer. To remove yourself as the preparer, click the REMOVE button on your client list on your homepage.

Next, have your employee log in and click the ADD EXISTING ACCOUNT button to request access to the client's account. The Portal will send an email message to the client.

Last, advise the client to click the link in the preparer access email to go to FileLocal and grant your employee's access request. The client may be asked to log in before they can grant access.

I'm a preparer and can't connect to my client's account on FileLocal.

After selecting MANAGE EXISTING USER ACCOUNT, verify that you correctly entered the client's email address in the email search box. If your client has not created an account in FileLocal, their account cannot show up in the search results. In that case, you or your client will need to set up the business account in FileLocal. If you want to set up the account for them, click ADD NEW ACCOUNT. If your client prefers to create their own account, direct them to click CREATE BUSINESS ACCOUNT on the FileLocal login screen.

If you have already requested to manage the account but it still shows as "Pending" in your client list, then your client has not yet approved you as their preparer. Your client should have received an email when you requested to manage their account, and they need to follow the instructions in that email message to grant you access.

Where can I find more information about Preparer email reminder assistance?

If you would like to receive periodic email reminders that a preparer has access to your account, you can set your Email Preferences under My Account. From the Account Center menu, click My Account. On the My Account screen, click Email Preferences. At the bottom of the page, you can indicate how often you want to be reminded about a preparer having access to your account. The Portal will automatically send you an email message reminding you about preparer access based on the frequency you indicate.

I am no longer a preparer for a business. How do I remove myself from the account?

On your home page, look at the list of your clients. Find the business you are no longer a preparer for, and click the REMOVE button to the right. The business will be removed from your client list and will be made available for management by the taxpayer or another preparer.

Where can I see a list of users assigned to my account?

On the menu bar, mouse over ***Account Center***, then click ***Manage Clerical Users (***Note: Only Clerical users are visible here, not Preparers).

Participating cities with FileLocal

Participating FileLocal cities are:

- Auburn
- Bellevue
- Des Moines
- Everett

- Kent
- Lake Forest Park
- Poulsbo
- Renton
- Seattle
- Shoreline
- Tacoma

You may apply for and/or renew general business licenses for all of the municipalities except for Auburn and report tax for all except Kent.

Why was my form setup approved by one city but not another?

Business rules differ by city. Please contact the city for a detailed explanation of their business rules.

Why was my license approved for one city but not another?

Business rules differ by city. Please contact the city for a detailed explanation of their business rules.