



Ohio Dept. of Taxation — OH|TAX eServices & Refund Status

Ohio Dept. of Taxation eServices and Where's My Refund

————— **An Extended Guide · No. 1775** —————

Tech Made Simple. Service Made Personal.

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SUMMARY

The 60-Second Version

Here is the whole guide in a nutshell. The Ohio Department of Taxation runs a free online system called OH|TAX eServices, where you can file your Ohio return, make a payment, read letters, and check a refund. The refund tool is called Where's My Refund. Start only at tax.ohio.gov and type the address yourself, looking for the dot gov ending. For a quick refund check you type in a few details from your return, including the exact refund amount. For everything else you sign in with your OH|ID, which has its own guide. Electronic returns can take a few days to appear, paper returns several weeks, and a few returns need a manual review, so patience is part of the process. The real tax office never asks for gift cards, passwords, or one-time codes by phone. If any of this feels tangled, that is exactly what I help neighbors with, so please call me.

1. What OH|TAX eServices Is

The state tax office's online front door.

OH|TAX eServices is the Ohio Department of Taxation's online system for individuals. It is the place where you can file your Ohio income tax return, make a payment, look at letters the tax office has sent you, and check on a refund. It also handles school district income tax for people who live in a district that has one.

Think of it as a secure counter at the tax office that happens to be open on your own computer. You do not have to drive anywhere, wait in line, or mail an envelope. You also do not have to use it. Paper forms and phone calls still work, and later chapters cover those too.

I wrote this guide because many people in Portage County tell me they feel nervous the first time they see a state tax website. That is a sensible feeling. Go slowly, read each screen, and remember that you can close the page at any point without anything bad happening.

- File an Ohio individual or school district return
- Make a payment toward what you owe
- View letters and notices from the tax office
- Check the status of a refund

GOOD TO KNOW

Using OH|TAX eServices is free. If a website asks you to pay just to get in, it is not the real one.

2. What Where's My Refund Is

A tool that tells you where your money is.

Where's My Refund is the tax department's refund tracker. After you file, you can use it to see whether your return has been processed and what is happening with your refund. It saves you a phone call and a lot of wondering.

The tool lives on the Department of Taxation's website, on a page titled Where's My Refund. On that page you will see a button labeled Check My Refund Status. The page explains that you can check a refund for an Ohio individual return or a school district return, and that refund information is available for the current tax year and the past two years.

There are two ways to use it. You can look up a refund without a full account by typing in a few identifying details, or you can sign in to OH|TAX eServices with your OH|ID and see it there along with your other tax information. Both ways are explained in this guide.

TIP

Checking more than once a day will not speed anything up. The information changes as your return moves along, not minute by minute. Checking every few days is plenty.

3. Before You Start

A short list of what to have beside you.

You do not need much, but having a few things at hand makes this go smoothly. Sit somewhere comfortable with good light, and give yourself a quiet half hour the first time.

- A copy of the Ohio return you filed, or your tax software confirmation
- Your Social Security number
- The exact refund amount shown on your return, down to the cents
- The tax year you want to check
- An email address you can open, if you plan to make an account
- Your OH|ID username and password, if you already have one

The refund amount is the item that trips people up. The tool wants the amount from your return, not the amount you hoped for or the amount on a federal refund. Look at the refund

line on your Ohio return, or ask your preparer for a copy.

Gather these on the table before you open the website. Nothing is worse than being halfway through a screen and having to hunt through a drawer. If something is missing, it is fine to close the page and come back later.

TIP

If you cannot find your return, your tax software or your tax preparer can usually give you another copy. Check that first before you guess at numbers.

4. Getting to the Real Website

Type the address yourself.

The most important habit is starting at the genuine address. The Ohio Department of Taxation's website is tax.ohio.gov. The refund tool can be reached by typing tax.ohio.gov/refund into the address bar at the very top of your browser.

Look for the dot gov ending. That ending is reserved for real government. A copycat will often end in dot com or dot net, or will have a tiny spelling change in the middle. Near the top of the real Ohio pages you will also see a small banner that says it is an official State of Ohio site.

Be careful with search engines. Sometimes the first result is an advertisement for a company that charges to do what the state does for free. The little word Ad beside a result is your clue to skip it.

- 1 Open your web browser.
- 2 Click in the long address bar at the top, not the search box.
- 3 Type tax.ohio.gov/refund and press Enter.
- 4 Check that the address still ends in dot gov.
- 5 Look for the official State of Ohio banner.

WATCH OUT

A text or email that says your refund is waiting and gives you a link is a classic trick. Ignore the link and type the address yourself.

5. Two Ways In

A quick guest check, or a signed-in account.

The Department of Taxation gives you two doors. Knowing which one you want saves time.

The first door is the refund check without a full account. You type in a few details that prove you are you, and the tool shows the status of your refund. It is quick and works well if all you want is a one-time answer.

The second door is signing in to OH|TAX eServices with your OH|ID. This takes more setup the first time, but then everything is in one place. You can check refunds, see letters, send a secure message to the tax office, and make payments. If you expect to deal with the tax office more than once, the account is worth making.

- Guest check: fastest, nothing to set up, refund status only
- Signed in: more features, needs an OH|ID and a one-time identity check

Neither door is better than the other. Plenty of people use the quick check for years and never make an account. Others like having everything in one place. You can always start with the guest check and add the account later if you find you want it.

GOOD TO KNOW

The Department's refund page says that to send a message about a late or lost refund you log in to OH|TAX eServices, so the account is useful if something goes wrong.

6. OH|ID and This Service

One login that opens many Ohio doors.

OH|TAX eServices signs you in with OH|ID, the State of Ohio's single login. The pipe in the middle is a thin vertical line, and you will see it on the sign-in buttons. If you already use OH|ID for the BMV or another state service, the same username and password work here.

I have a separate guide just for OH|ID that walks through making the account, choosing a password, and turning on the extra security code. If you do not have an OH|ID yet, I suggest reading that guide first or following along with it. This guide picks up once you have your login.

Notice that having an OH|ID does not automatically mean you have set up your tax profile. The tax system builds that part the first time you connect, which the next chapter covers.

- Your OH|ID is free and belongs to you alone
- One OH|ID per person, even for married couples

- Start at the tax site and choose the OH|ID sign-in option

TIP

Keep your OH|ID username written in a notebook by the computer. The password can go in a separate safe spot at home.

7. Proving It Is You the First Time

A one-time identity check.

The first time you sign in to OH|TAX eServices, the Department needs to be sure you are really you. This protects you, because the account holds private tax details. It is a one-time step.

According to the Department's help pages, you start the identity verification from your dashboard after creating your OH|ID. The questions ask for personal details the tax office already knows, such as your Social Security number, your last name, and your date of birth. You may also be asked about information from a previous return or a wage statement. If the tax office mailed you a letter with a special letter ID, that can be used as well.

The exact screens may look a little different when you get there, so read each one carefully. If a question does not match what you have, stop and reread rather than guessing.

- 1 Sign in with your OH|ID.
- 2 Choose to verify your identity when the dashboard offers it.
- 3 Answer each question from your papers.
- 4 Finish and wait for the confirmation screen.

TIP

Have last year's Ohio return in front of you. Many of the questions can be answered right from it.

8. The Refund Tool, Step by Step

What you will see on the screen.

Here is the guest version of the refund check from start to finish. Take your time. Nothing you type here changes your return. You are only asking a question.

- 1 Type tax.ohio.gov/refund into your browser's address bar.

- 2 Find the button labeled Check My Refund Status and click it.
- 3 Read the short instructions on the screen that follows.
- 4 Type in the details it asks for, such as your Social Security number, the refund amount, and the tax year.
- 5 Click the button to submit.
- 6 Read the status message that comes back.

If the tool says it cannot find your information, do not panic. The most common cause is a small typing error or the wrong refund amount. Check your numbers against your return and try again slowly.

If you have an OH|TAX eServices account, you can use the same Check My Refund Status path after signing in, and the tool already knows who you are, so there is less to type.

WATCH OUT

Never type your Social Security number into a page that does not end in dot gov. Look at the address bar before you type.

9. Getting the Details Right

Small mistakes cause most of the trouble.

The refund tool is picky, which is a good thing for your privacy but a nuisance when you mistype. Most failed lookups come down to one of a few small slips.

- Using the federal refund amount instead of the Ohio amount
- Rounding the amount instead of typing it exactly, cents included
- Choosing the wrong tax year
- Mixing up your number with your spouse's if you filed jointly
- Transposing two digits in the Social Security number

If you and your spouse filed a joint return, use the details from the return as filed. If you are unsure whose number was listed first, check the top of the return.

Another thing that confuses people is that individual income tax and school district income tax are separate returns with separate refunds. The page says you can check either one. If you filed both, you may have to check each one on its own.

Take a slow breath before you press the submit button. A lookup that fails is not a mark against you, and it does not lock anything. If you try several times and keep failing, step away, find your return, and compare each number one more time.

TIP

Write the exact refund amount on a sticky note and put it on the edge of your screen. It saves flipping back and forth.

10. Reading Your Status

What the answer is telling you.

When the tool answers, it gives you a short message about where your refund stands. I will not list the exact wording, because the state can change its messages. What matters is understanding the general stages.

Your return goes through a few stages. First, the tax office has to receive it. Then it is processed and checked. Finally, a refund is issued, either by direct deposit into your bank account or as a paper check in the mail. The status message tells you which stage you are in, and when a refund is on its way it may show a date.

If the message says there is no information, that does not mean something is wrong. It may simply mean the return has not been processed yet. The Department's page says that for electronic filers it can take a couple of days after your return is sent before anything shows up.

- Received: the tax office has your return
- Processing: someone or something is checking it
- Issued: your refund has been sent out

GOOD TO KNOW

Those three stages are my own plain summary, not the state's exact labels. Read the real message on your screen and ask me if it is unclear.

11. How Long Should I Wait

Patience, with a few useful markers.

Everyone wants a date. The honest answer is that refund timing varies, and I do not want to promise a number the state has not promised you. The Department of Taxation's refund page gives a few helpful markers.

For returns filed electronically, the page says it may take two to three days for the return to be processed after you send it. If there is still no information after that, the page suggests asking your preparer or your tax software to confirm that Ohio accepted the return. You

may need to send it again.

For paper returns, the page says they can take several weeks to show up in the system, and longer in the busiest months of spring, because so many returns arrive at once.

- Electronic return: allow a few days before the tool knows about it
- Paper return: allow several weeks before the tool knows about it
- Busy spring season: expect it to take longer

WATCH OUT

If you are worried a paper return was lost in the mail, the Department's page notes you can file electronically for free through OH|TAX eServices. Ask me before doing so, so you do not file twice by accident.

12. E-File or Paper

Why most people find e-filing easier.

You can send in your Ohio return on paper or electronically. Both are accepted. Which one you choose changes how quickly you can track things and how your refund arrives.

When you e-file, the tax office receives the return within moments, and you can choose direct deposit for your refund. When you file on paper, you wait for the mail to deliver it and for staff to enter it. The Department's page says direct deposit is not available to paper filers, who receive a paper check in the mail.

That said, paper is perfectly fine if it is what you are comfortable with. Plenty of neighbors do their taxes at the kitchen table with a pen, and that is a good way to do them. Just know that the refund tracker will have less to show you for a while.

- E-file: faster to appear, direct deposit available
- Paper: slower to appear, refund comes as a paper check

GOOD TO KNOW

Do not put bank account details on a paper return. The Department's page specifically says not to include banking information with a paper return.

13. Direct Deposit Basics

Getting the account numbers exactly right.

Direct deposit puts your refund straight into your bank account. It is quicker and safer than a check that can get lost or stolen. If you e-file, you can choose it when you fill in your return.

The Department's page lists where an e-filed refund can go: a checking account, a savings account, a retirement account, or an Ohio college savings account. For most people, checking or savings is the right choice.

Here is the part to take seriously. The page says that once your return is submitted, the direct deposit information cannot be changed, and the Department is not responsible if the wrong account numbers were entered. So check the routing number and account number twice before you send the return.

- 1 Find a check or your bank's website for the routing and account numbers.
- 2 Type each number slowly.
- 3 Read them back out loud against the check.
- 4 Only then send the return.

If you are unsure about your routing number, your bank can tell you, and so can a printed check from that account. Banks are used to this question. Asking costs nothing, and a quick phone call is far better than a refund that goes to the wrong place.

WATCH OUT

Never give your bank account number to someone who calls and says they need it to release your refund. Ohio asks for it only on your return.

14. When the Refund Is Not What You Expected

Two common reasons.

Sometimes the refund that arrives is smaller than the one you expected. That can be upsetting, but there is usually a clear reason. The Department's refund page names two common ones.

The first is an adjustment. The tax office may have changed a number on your return after reviewing it, perhaps to fix a math error or a credit. If so, you should receive a notice explaining the changes and what to do if you disagree.

The second is an offset. If you or your spouse owe a debt, the refund can be used to pay it. The Department has a Refund Offset page that explains how this works. The page also notes that for debts owed to other agencies, the tax office may not be able to give you details, so you may need to contact that agency.

- Look in your mailbox for a notice
- Sign in and check for letters in your account
- Read the Refund Offset page on tax.ohio.gov

WATCH OUT

Keep any notice you get. It explains the change and tells you how to respond, so do not toss it.

15. Returns Under Manual Review

A pause that does not mean trouble.

Some returns are held for a person to look at before the refund goes out. This is called manual review. It sounds worrying, but the Department of Taxation's refund page states plainly that it does not mean something is wrong with your return.

If the examiner needs more information, you will get a notice by mail explaining which documents to send. Watch your mailbox and answer promptly, because the review may not move forward until you do.

The page also gives a guideline on waiting. It says most refunds are issued within sixty days, but that you should allow one hundred twenty days before contacting the tax office. After that, you can sign in to OH|TAX eServices and choose Send a Message under Additional Services, or you can call the tax office.

- Tax office phone: 1-800-282-1780
- Text telephone (TTY): 1-800-750-0750

Many people hear the words manual review and fear an audit. That is not what the Department's page describes. It is simply a stage where a person looks at the return before the refund is released. Keep your copy of the return handy in case a notice asks for support.

GOOD TO KNOW

Calling before the waiting period has passed usually just gets you the same answer. Be patient first, then call.

16. The Paper Check That Did Not Arrive

What to do if the mail lets you down.

If you filed on paper, your refund comes as a check in the mail. Mail times vary, so give it plenty of time. The Department's page says that if more than thirty days have passed since the check was issued, you can ask for it to be reissued.

You have two ways to ask. You can sign in to OH|TAX eServices and choose Send a Message under Additional Services, or you can call the tax office. Have your tax year and personal details handy, because they will verify who you are first.

Ohio refund checks also have an expiration. The page says they cannot be cashed after ninety days, and that a new one can be issued if yours is older. If you find an old check in a drawer, do not try to cash it. Ask for a new one using the same two methods.

- 1 Check that thirty days have passed since the issue date.
- 2 Look at your mail and any junk pile twice.
- 3 Sign in and send a message, or call 1-800-282-1780.
- 4 Keep a note of the date and who you spoke with.

WATCH OUT

If you moved, tell the tax office your new address as soon as possible so checks do not go to the old one.

17. Finding a Direct Deposit

Where to look in your bank records.

If your refund was supposed to go into your bank account and you do not see it, check a few things before calling anyone. The Department's page suggests a simple routine.

Direct deposits from the tax department show up with the name State of Ohio Taxrefunds. Search your account activity for that name. It might not land on the exact day the tax office gave you, so look through the week before and the week after.

- 1 Confirm the routing and account numbers on your return are correct.
- 2 Check every checking and savings account you own, especially at different banks.
- 3 Review activity from a week before to a week after the issue date.
- 4 Call your bank's customer service line.
- 5 If you use a prepaid card, call the number on the back of it.

Only after those steps does it make sense to contact the tax office. By then you will have useful answers for them.

Keep your search calm and orderly. Write down each account you checked and what you found, so you do not repeat yourself. If you bank with a small local institution, their staff can often look up a deposit while you wait on the phone.

GOOD TO KNOW

Banks sometimes show the deposit under a slightly different label than the state uses. Look at the amount, not just the name.

18. If You Used a Tax Preparer

Why the money may arrive in two steps.

If a paid preparer or a tax software company filed for you, your refund may not go straight to you. The Department of Taxation's page explains that some preparers and software offer extras, such as taking their fee out of your refund or giving you an advance.

When you choose one of those, your refund goes first to the preparer's account so they can subtract the fees. In most cases an Ohio refund arrives sooner than a federal one, so the fee is often taken from the first refund to land. The result can be a refund smaller than you expected.

It may also not look like a deposit from the State of Ohio. It could be labeled with your preparer's name, the software company, or just the word refund. The tax office says it cannot answer questions about fees a preparer charges, so those go to the preparer.

- Read what you signed with your preparer
- Ask what fees come out of the refund
- Look for the preparer's name in your bank record

WATCH OUT

A refund advance is a loan with strings attached. Ask for the fees in plain words before you agree to anything.

19. Filing Your Return Online

What the screens look like.

OH|TAX eServices lets you file an Ohio individual or school district return directly on the state's website. After you sign in, you choose the option to file and then follow the screens one by one.

The system walks you through your information in a logical order. You type in numbers from your wage statements and other papers, and the system helps with the math.

Because the screens can change, I will keep this general. Read each one before you click Next.

- 1 Gather your wage statements, your federal return, and last year's Ohio return.
- 2 Sign in with your OH|ID.
- 3 Choose the option to file a return.
- 4 Enter your information as each screen asks.
- 5 Review everything before you send.
- 6 Save or print the confirmation.

If you get stuck on a question, stop. You can usually save your place or come back later. A careful return is better than a fast one.

There is no need to rush this. Many people file in one sitting, but there is nothing wrong with doing a little each day. Keep your papers in a folder beside you, and if a number does not make sense, set it aside and ask a preparer or me.

TIP

Keep your federal return nearby. Ohio's return begins with numbers from it, so the two need to agree.

20. Free Help With Filing

You do not have to pay to file or to get help.

Many people pay a preparer out of habit, but you do not have to. The state's own system lets you file for free. The Department's refund page confirms that you can file electronically for free using OH|TAX eServices.

If you want a person to help, the Department's website points to free tax return preparation by volunteers, run through the IRS. These volunteer programs often set up at libraries and community centers during tax season. They are generally meant for people with modest

incomes and for older adults, and they do not charge for preparing a return.

To find a site near you, start at the official IRS volunteer preparation page and look for Portage County or a nearby community. Call ahead, since schedules and rules vary and I cannot promise what any site offers.

- File for free through OH|TAX eServices
- Ask about free volunteer help at a library or senior center
- Compare any paid option against the free ones first

GOOD TO KNOW

If a company advertises free filing and then asks for payment at the end, you are allowed to stop and use a truly free option instead.

21. Seniors and Ohio Income Tax

Look for the page written for you.

The Department of Taxation's website has a page for seniors under its individual resources. It explains how Ohio income tax works for older residents, including which rules and credits may apply to you.

I do not want to guess at amounts or ages, because the rules can change and they depend on your own situation. What I can tell you is that it is worth reading that page before you file, or before you pay a preparer. Some retirees find they owe less than they feared, and some find they do not need to file at all.

The page called Who Must File can also help you decide whether you are required to send in a return. If you are not sure, you can call the tax office and ask.

- 1 Go to tax.ohio.gov.
- 2 Choose the Individual section.
- 3 Look for the Seniors page in the list of individual taxes.
- 4 Read it with your own papers beside you.

TIP

Even if you are not required to file, you might need to file to get a refund of money that was withheld from your pay or pension. The refund page says you have four years from the original due date to claim a refund.

22. School District Income Tax

A separate tax in some places.

Some Ohio school districts charge their own income tax on top of the state one. If you live in one of those districts, you file a school district return in addition to your Ohio return. OH|TAX eServices handles both.

It is easy to forget, because the state return and the school district return are separate forms with separate amounts. Your refund or balance due for each is separate too. The refund tracker covers both, but you look up each one on its own.

The Department of Taxation has a page to help you find out which school district you live in and whether it has this tax. That is more reliable than asking a neighbor, because district lines do not always follow town lines.

- Use the Find Your School District page on tax.ohio.gov
- Check your tax papers for a school district number
- Ask a preparer or call the tax office if unsure

A school district return is not the same as the property tax bill that comes from the county. They are different taxes with different offices. If you are unsure which one a letter is about, read the name at the top of the page before replying.

WATCH OUT

Do not assume that because your friend two streets away does not owe school district tax, you do not either. Verify using the official page.

23. Making a Payment

If you owe instead of getting a refund.

If your return shows a balance due, you can pay online through OH|TAX eServices. The Department of Taxation also has a Pay Online page on its main site that points the way.

The online system lets you pay by electronic check straight from your bank account, or by credit or debit card. You will be asked for details about what the payment is for, such as the tax year and whether it is for your state return or a school district return. Those two are paid separately, so choose carefully.

- 1 Sign in to OH|TAX eServices.
- 2 Choose the option to make a payment.
- 3 Pick the right tax type and year.

- 4 Enter your payment information.
- 5 Review everything.
- 6 Submit and save the confirmation.

If you cannot pay the full amount, do not ignore it. Call the tax office and ask about your choices, rather than assuming a plan can be set up online.

Most people only pay once a year, so the screens feel unfamiliar each time. That is normal. Move slowly, read each choice, and use the Back button if you notice you picked the wrong year or tax type before you submit anything.

TIP

Paying on time matters even when the amount is small. Late payments can add interest and penalties.

24. What Payments Cost

Fees explained in plain words.

Paying by electronic check is free according to the Department of Taxation. That is usually the cheapest way, and it takes the money straight from your checking or savings account.

Paying with a credit or debit card works too, but there is a convenience fee. The fee goes to the company that processes card payments, not to the state. I will not quote an amount, because it can change. The payment screen should show it before you confirm, so read it.

Another useful detail is that card payments generally cannot be scheduled for a later date, while some other payment types can be set for a future day. If you want to pay on a due date without remembering, ask about scheduling with an electronic check.

- Electronic check: no fee
- Card: a convenience fee, shown before you confirm
- Mailed check: the cost of a stamp and a few days

If paying by card, think about your own bank. Some card issuers treat tax payments differently from ordinary purchases, and your statement may show the fee as a separate line. A phone call to your card company can answer that before you pay.

WATCH OUT

Only pay through tax.ohio.gov and the sign-in it leads to. A website that charges a large fee to pay your state taxes is not the state.

25. Letters and Notices

Your mailbox, online.

When the tax office needs to tell you something, it often sends a letter. If you have an OH|TAX eServices account, you can also look at those letters on screen. The help pages say to look for a choice labeled View Letters and Notices under the Additional Services tab.

This is handy in two ways. You can read a letter again if you lose the paper copy, and you can confirm that a letter you received in the mail is real by checking whether it also appears in your account. Fake letters will not show up there.

- 1 Sign in to OH|TAX eServices.
- 2 Find the Additional Services tab.
- 3 Choose View Letters and Notices.
- 4 Open the letter and read it slowly.
- 5 Print it or save a copy.

The wording on the screens may differ a little from my description, so look for something close to it.

Some people like to check their account every so often just to be sure nothing is waiting. That is a fine habit, particularly after you file or after you move. A few minutes a couple of times a year can catch a problem before it grows.

TIP

If a letter has a deadline, write the date on your calendar the day you read it.

26. Answering a Notice

Do not ignore the letter.

If the tax office sends a notice, it will tell you what it wants. It might ask for a document, explain a change to your return, or tell you that you owe something. None of that is an emergency, but each one deserves a reply on time.

The Department of Taxation has a page for this, reachable at tax.ohio.gov/reply. It is labeled Respond to a Notice. Your notice will also list the ways to answer, such as a mailing address or phone number printed right on the letter.

When you reply, use only the information printed on the notice or the official tax.ohio.gov page. If you are unsure whether a notice is real, sign in at the site yourself and see if it matches what is in your account.

- Read the whole letter first
- Note the due date
- Gather what it asks for
- Make a copy before mailing anything

If you cannot understand what a notice wants, you are not alone, because these letters can be written in dense language. Read it twice, underline the dates and requests, and call the number on the letter or me for help translating it into plain English.

GOOD TO KNOW

If a notice proposes to change your refund and you disagree, it will explain how to tell the tax office. Following that process protects your rights.

27. Sending a Secure Message

Asking the tax office a question online.

Inside OH|TAX eServices there is a way to send a message to the tax office without picking up the phone. The Department's refund page points to it several times, always under the Additional Services area, with a choice labeled Send a Message.

This is useful for questions about a late refund, a missing check, or an old check that has expired. The message goes through your logged-in account, so the tax office already knows who you are and your private details are protected.

Be specific. Say which tax year you mean, what you filed, and what has gone wrong. A short message with the facts gets a better answer than a long one without them.

- 1 Sign in to OH|TAX eServices.
- 2 Open Additional Services.
- 3 Choose Send a Message.
- 4 Type your question, the tax year, and what you filed.
- 5 Send it and note the date.

Messages are a good choice if you are hard of hearing or dislike long phone calls. You can take your time writing, reread what you wrote, and keep a record of exactly what you asked, which a phone call does not give you.

WATCH OUT

Never put your full Social Security number into the body of an ordinary email. Use the secure message inside your account instead.

28. Old Returns and 1099s

Finding paperwork from earlier years.

OH|TAX eServices can also show you things you may have misplaced. The Department's introduction to the service says you can view and print previous years' Ohio returns, and also certain 1099 forms.

This can be a lifesaver when a new preparer asks for last year's return, when you apply for something that requires proof of income, or when you simply cannot find your own copy. Rather than calling around, you can often find it yourself in a few clicks.

Availability depends on the year and on what you filed, so I would not promise that every document will be there. If something is missing, send a message through your account.

- Prior-year Ohio returns, when available
- Certain 1099 forms, when available
- Printable copies for your files

Many people discover this feature only when they need it urgently, such as when a lender or a program asks for proof of income. Taking a few minutes now to learn where these documents live can save a scramble later. Treat it as part of your home filing system.

GOOD TO KNOW

Printing a PDF is better than a photo of your screen. A printed copy looks cleaner and keeps all the numbers readable.

29. If You Prefer Paper or the Phone

Online is a choice, not a requirement.

Not everyone wants to do taxes on a computer, and that is fine. The tax office still takes paper returns and answers the phone. Paper forms can be picked up or ordered, and many are available at public libraries.

The main tax office number for questions is 1-800-282-1780. If you use a text telephone or similar adaptive equipment, call 1-800-750-0750. Have your Social Security number and your return in front of you, and expect to be asked questions to confirm who you are.

You can also order forms by phone or online from the Get a Form page on the website. I would not guess at the hours, so check the tax office's website or the printed notice before calling.

- Phone for questions: 1-800-282-1780
- TTY: 1-800-750-0750
- Forms: tax.ohio.gov, then Get a Form

There is nothing old-fashioned about picking up the phone. Plenty of sensible people prefer a voice, and the tax office staff are there to help. Be patient on the line, since busy times can mean a wait, and keep a pen ready for notes.

TIP

Before you call, write your questions on paper. It keeps the call short and makes sure you get everything answered.

30. Scams That Use the Tax Office's Name

They all rely on fear and hurry.

Because everyone worries about taxes, scammers love to pretend to be the tax office. Knowing their tricks makes them easy to spot. The real Ohio Department of Taxation will never demand payment in gift cards and will never threaten to have you arrested by phone.

- A call claiming you owe money and must pay today by gift card
- A text saying your refund is on hold, with a link to click
- An email that asks you to confirm your Social Security number
- A caller who asks you to read back a code you just received
- A website that charges a fee to check your refund

The common thread is pressure. Real notices give you time, arrive by mail, and match what you see when you sign in on your own. If you feel rushed, that is the sign to hang up.

Hang up and call the tax office yourself at the number on its official website, or sign in at tax.ohio.gov and see whether anything is really waiting.

WATCH OUT

The real agency never asks for your OH|ID password or a one-time code by phone, text, or email. If you gave one out, change your password and call me.

31. Identity Theft and ID Checks

If someone filed using your name.

Sometimes thieves file a fake return using another person's Social Security number, hoping to grab the refund. The Department of Taxation has pages on identity verification and identity theft, and it may mail you a letter asking you to verify who you are before it releases a refund.

If you receive a letter like that, do not throw it away, and do not assume it is a scam. Compare it with what you see inside your OH|TAX eServices account, and follow only the instructions on the official site. The Department's help pages mention that a letter ID from such a letter can be used in the verification process.

If you find out you tried to file and Ohio says a return already exists for you, that is a strong sign of identity theft. Call the tax office right away.

- 1 Read the letter carefully.
- 2 Go to tax.ohio.gov yourself, not through a link.
- 3 Find the Verify My Identity or ID Verification page.
- 4 Follow the steps with your letter in hand.

TIP

Keep a record of every call and letter. It helps if the case takes a while.

32. Using a Library or Borrowed Computer

Public computers are fine with care.

If you do not have a computer at home, the Portage County District Library and many senior centers offer computers you can use for free. Checking a refund on one is fine as long as you follow a few habits.

- Type tax.ohio.gov/refund yourself
- Do not let the browser save your password
- Sign out of OH|TAX eServices and OH|ID when you finish
- Close the browser window before walking away
- Take your printed pages with you

Library staff are used to helping with questions, and they will not mind if you ask where to find the printer. They generally will not type your private details for you, and you should not hand your Social Security number to anyone looking over your shoulder.

If you are signed in to anything at all, finish by signing out, then close every window.

If a family member lets you borrow their computer instead, the same rules apply. Sign out, clear any saved passwords, and close the window. Treat a borrowed device as you would a borrowed car, and leave it as clean as you found it.

WATCH OUT

If a public computer offers to save your login, choose No or Not Now. Saving belongs on your own computer at home.

33. Helping a Spouse or Parent

Sit beside them, do not do it for them.

Many families help an older relative check on a refund. That is a kind thing to do. The safest way is to sit beside them, let them type their own private details, and talk through each screen.

If you do their taxes regularly, the Department of Taxation has a Taxpayer Representation Form for officially authorizing someone to speak for you. I do not want to describe the form in detail, so look for it on the website or ask the tax office. That is better than sharing a password.

Spouses who file jointly will see the same return, but each person should have their own OH|ID. Do not share a login, even with someone you trust. If something goes wrong, separate accounts make it easier to sort out.

- Let them type their own Social Security number
- Read the screen aloud together
- Use the official authorization form for ongoing help

It also helps to talk about money matters before an emergency happens. Sit down with a parent or spouse and agree on who will help with taxes, where the papers are kept, and how to reach the preparer. A calm conversation now prevents a scramble later.

GOOD TO KNOW

If you handle money for someone who can no longer manage it, ask the tax office what documents it needs. Do not pretend to be the person.

34. Keeping Your Records and Making Text Bigger

Proof, comfort, and calm.

Whenever you file, pay, or check a refund, keep a record. A simple folder at home is enough. Include a copy of the return, the confirmation page, the date you filed, and the refund amount.

- Print the confirmation, or choose Save as PDF in the print window
- Write the confirmation number in a notebook
- Keep papers for several years, as the tax office can ask about past returns

If the print on the screen is small, make it bigger. On a computer, hold Ctrl, or Command on a Mac, and press the plus key to zoom in. Press Ctrl and zero to return to normal size. On a phone or tablet, spread two fingers apart on the page.

Bigger text does not change how the website works, only how comfortably you can read it, and a relaxed reader makes fewer typing mistakes.

One more habit worth building is writing a short note each time you file, such as which method you used and who helped. Months later, when a question comes up, that note answers it in seconds. Keep the note in the same folder as the return.

TIP

A little organization pays off. Next time a question comes up, you will be glad to have the paperwork in one place.

CHEAT SHEET

Everyday Cheat Sheet

Keep this by the computer. I want to... Get to the real site: type tax.ohio.gov yourself. Check my refund: type tax.ohio.gov/refund and choose Check My Refund Status. Sign in: use my OH|ID at OH|TAX eServices. Read a letter: Additional Services, then View Letters and Notices. Ask about a late refund: sign in and choose Send a Message, or call 1-800-282-1780. Pay what I owe: sign in and choose the payment option. Spot a scam: no gift cards, no passwords, no codes by phone. Get help: call Bill at (330) 200-8042.

AT A GLANCE

A Picture to Follow Along

Checking Your Ohio Refund

From your return to the answer.

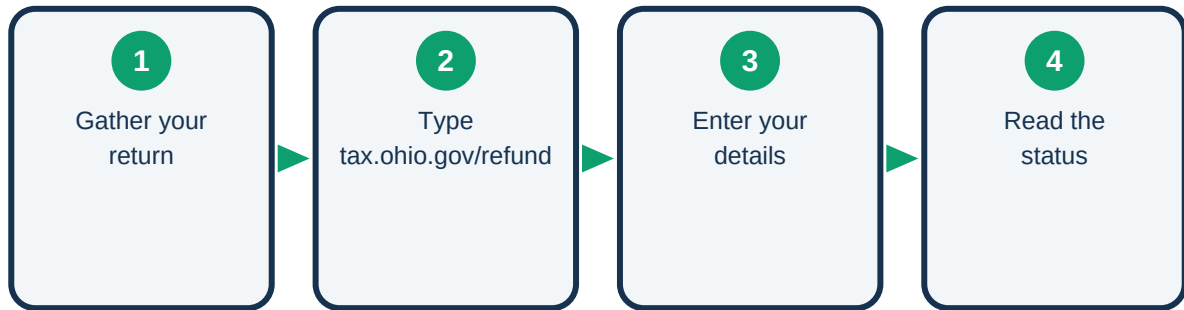
**Type the address yourself and look for dot gov.**

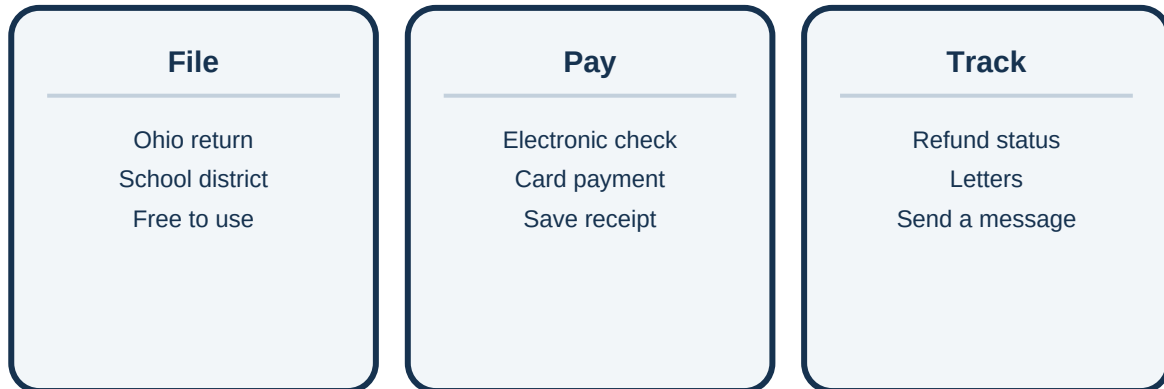
Illustration - details vary by device, plan, and provider. Always check your own setup.

AT A GLANCE

A Second Look

What OH|TAX eServices Does

One account, several jobs.



Sign in with your free OH|ID.

Illustration - details vary by device, plan, and provider. Always check your own setup.

BEFORE YOU GO

A Note From Bill

A quick note from Bill. I write these guides to make home tech a little less frustrating, and I do my best to keep every step accurate and up to date. Still, every home, device, and setup is a bit different, so I can't promise a guide will match yours exactly or fix your particular problem. These guides are for general information only — they're not professional, legal, or financial advice, and they don't replace your device's own manual or the manufacturer's instructions. Please go slow, use your own good judgment, and use everything here at your own risk. If a step involves electrical wiring, a gas appliance, a water heater, plumbing, or climbing a ladder — or if anything just doesn't feel safe — please stop and call a licensed professional (or give me a call at 330-200-8042). Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results.



HOW I CAN HELP

Your Visit — and My Promise

In-home visit — \$99 flat for your first visit. No contracts and no surprise charges, and a 30-day follow-up is included.

Remote Support — \$49 for a screen-share session. I only connect with your permission, you watch the whole time, and you can end anytime. If I can't fix it over the screen-share, I refund the \$49 — and if it turns out you need me in person, that \$49 goes toward your visit. It's included free for Support Plan members (\$39/mo).

GOOD TO KNOW

My promise — If you're not 100% satisfied with your visit, I'll come back at no charge, or refund the full \$99. No questions, no awkwardness. That's how I'd want to be treated.

Call or text **(330) 200-8042** · Book a visit: billshometech.com/book · bill@billshometech.com

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