MyTax.DC.gov User Guide:
How to Store Bank Account Information

Storing your bank account information in MyTax.DC.gov makes it faster and simpler to pay your taxes online. **You can follow the steps below for both business and individual tax accounts.**

1

Username

Password

Log In

Forgot username or password?

New user?
Sign-up for MyTax.DC.gov

Can't find what you're looking for? Enter keywords here to filter.

Business
I want to...
- Register a New Business - Form FR-500
- Register a Special Event - Form FR-500B
- Request a Certificate of Clean Hands

Individual
I want to...
- Check the Status of My Refund
- Learn More About DC Freefile/Fillable Forms
- Respond to Verification Letter
- View Tax Forms

Real Property
I want to...
- Make a Real Property Payment
- Search Real Property by Address or SSL
- View More Options

Clean Hands
I want to...
- Request a Certificate of Clean Hands
- Validate a Certificate of Clean Hands
- Learn More About Certificate of Clean Hands

Forms
I want to...
- Submit an Extension
- View/Retrieve Current Year Tax Forms
- View/Retrieve Prior Year Tax Forms
- View MeF Information

Quick Links
I want to...
- Submit a Customer Service Survey
- View FAQs
- View Tutorials
- Contact OTR

Quick Payments
I want to...
- Pay with Credit/Debit Card

Resources
I want to...
- Go to OTR Homepage

Submissions
I want to...
- Retrieve a Saved Submission or Previously Filed Return
- Submit Requested Documentation
- Submit VDA

Tax Law and Guidance
I want to...
- View Private Letter Rulings
- View DC Tax Code
- View Tax Guidance Issued by OTR
- View Notices

Taxpayer Advocate
I want to...
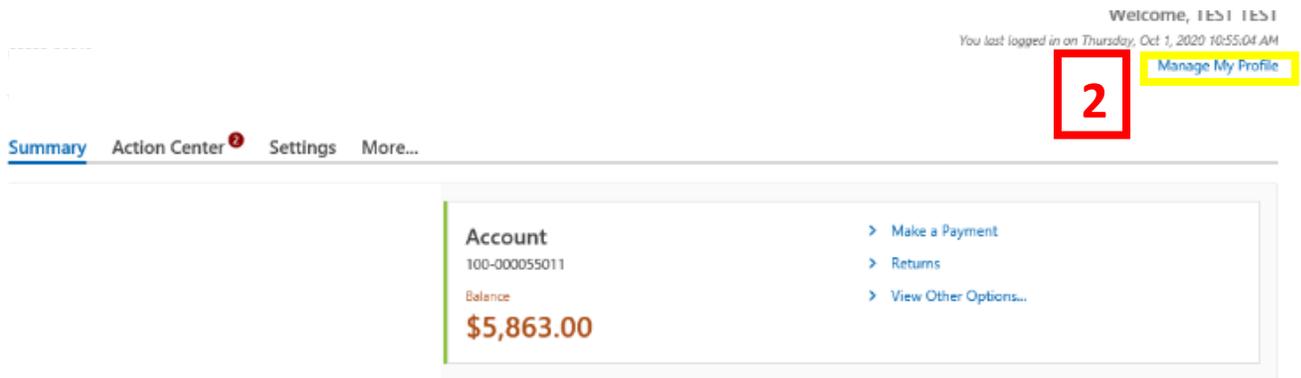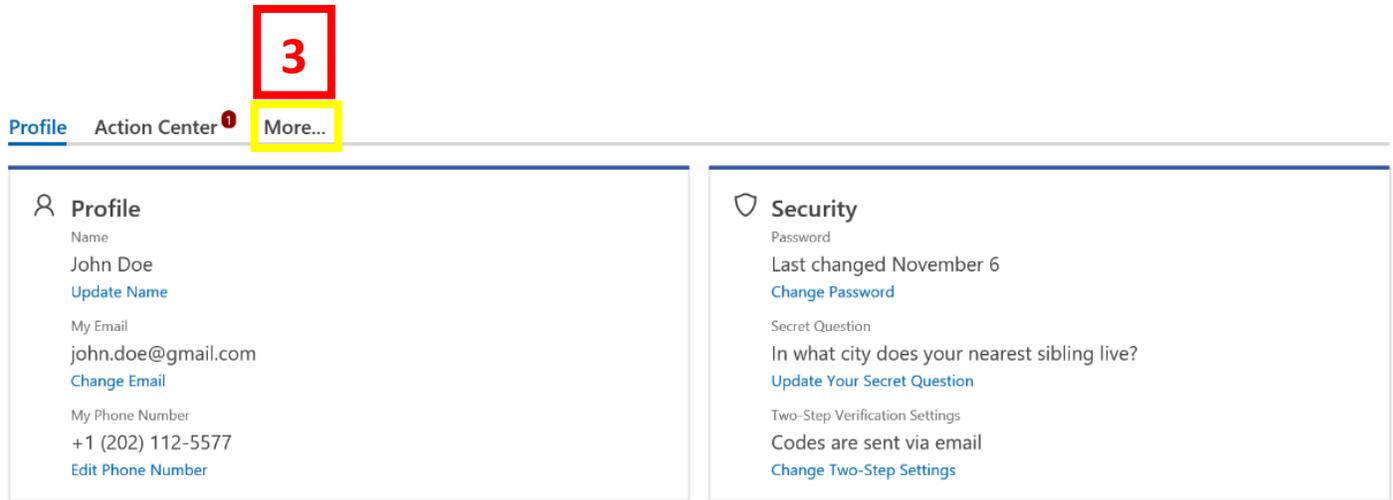- View Taxpayer Bill of Rights
- Request Assistance
- En Español

More...
I want to...
- File Form FR-329 - Consumer Use Tax Return
- Request Government Exemption
- Request Residential Parking Exemption
- Search for Certificate/License Exemptions

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1. From the MyTax.DC.gov homepage, log in using your **Username** and **Password**.
2. In the user profile, locate and **click** the "**Manage My Profile**" link in the upper right corner.

3

Profile   Action Center ❶   More...

👤 **Profile**

Name
John Doe
Update Name

My Email
john.doe@gmail.com
Change Email

My Phone Number
+1 (202) 112-5577
Edit Phone Number

🛡 **Security**

Password
Last changed November 6
Change Password

Secret Question
In what city does your nearest sibling live?
Update Your Secret Question

Two-Step Verification Settings
Codes are sent via email
Change Two-Step Settings

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3. You will be navigated to the **Manage My Profile** page. Locate and **click** the **More** tab.

Manage My Profile

John Doe
john.doe@gmail.com

4

Profile   Action Center ❶   More...

🔍 *What are you looking for?*

🛡 **Access**

Manage access of accounts I have access to.

> Manage My Access
> Manage Third Party Access
> Request Third Party Access
> Delete My Profile

👤 **Web Logons**

Manage web logons.

> Add an Additional Logon
> Manage Additional Logons

🏛 **Payment Channels**

Manage my bank accounts used to make payments on MyTax.DC.gov.

> Manage Payment Channels   **4a**

⬇ **Submissions**

Retrieve previously filed returns and requests.

> Search Submissions

💬 **Messages**

View messages I've received from the Office of Tax and Revenue.

> Send a Message
> View Messages

🗓 **Activity**

View my activity on MyTax.DC.gov.

> View Activity

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4. You will see your "**Payment Channels**" section.
    a. Locate and **click** the **Manage Payment Channels** hyperlink.

5

< **Manage My Profile**

Payment Methods

Filter

5a

⊕ Setup new payment channel

5. On the **Payment Methods** page, click **Setup new payment channel.**

6

Payment Method

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

Type

Direct Debit - US Bank

6a-6c

Bank Account

Bank Account Type

| Checking | Savings |

Routing Number

Required

Account Number

Required

Confirm Account Number

Required

Use default name

| No | Yes |

Name

Required

6d

Cancel   Save

6. From the **Payment Method** page, store your bank account information to use for future tax payments.
   a. Use the menu to select the bank account type (e.g. checking, savings).
   b. Enter your bank's routing and account number in the designated fields.
   c. Answer yes or no to **Use default name**. Choose to name your stored bank account by entering a name in the field provided under **Name**.
   d. Click the **Save** button to store your bank account.

Payment Method   Rename

METHUEN COOPERATIVE BANK - ^1111

Direct Debit - US Bank

   METHUEN COOPERATIVE BANK

   Checking

   Routing: 211371340

   Account: ****1111

   Remove this payment channel

Accounts Using This Payment Channel

   No accounts are using this payment channel.

7

7. Your bank account information is stored in your MyTax.DC.gov profile.

To verify your bank account information stored successfully, follow the steps below.

1001 4TH ST SW
WASHINGTON DC 20024-4517

Manage My Profile ❶

8

Favorites   **Summary**   **Action Center** ²⁶   **Settings**   **More...**

🔍 *What are you looking for?*

⬇ **Submissions**	💬 **Messages & Letters**	🗔 **Payments & Returns**
Retrieve previously filed returns and requests.	View messages and letters I have received.	Manage payments and returns for my accounts.
› Search Submissions	› Send a Message	› File or Amend Tax Returns
	› View Messages	› Manage Payments
	› View Letters	› Request for Exemption To File (FR-164)

8.   In the user profile, locate and **click** the "**Manage My Profile**" link in the upper right corner.

Manage My Profile

John Doe

john.doe@gmail.com

9

Profile   Action Center [1]   More...

A   **Profile**

Name

John Doe

Update Name

My Email

john.doe@gmail.com

Change Email

My Phone Number

+1 (202) 112-5577

Edit Phone Number

🛡   **Security**

Password

Last changed November 6

Change Password

Secret Question

In what city does your nearest sibling live?

Update Your Secret Question

Two-Step Verification Settings

Codes are sent via email

Change Two-Step Settings

9.   You will be navigated to the **Manage My Profile** page. Locate and **click** the **More** tab.

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Manage My Profile
John Doe
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Profile   Action Center ❶   **More...**

🔍 *What are you looking for?*

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10a

⬇ **Submissions**

Retrieve previously filed returns and requests.

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💬 **Messages**

View messages I've received from the Office of Tax and Revenue.

> Send a Message
> View Messages

☑ **Activity**

View my activity on MyTax.DC.gov.

> View Activity

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10. You will see your "**Payment Channels**" section.
   a.   Locate and **click** the **Manage Payment Channels** hyperlink.

Payment Methods

Filter

11

⊕ Setup new payment channel

METHUEN COOPERATIVE BANK - *1111

11. The link to the stored payment method displays. Click on the link to display details of the stored bank account.

Payment Method   Rename

METHUEN COOPERATIVE BANK - *1111

Direct Debit - US Bank

    METHUEN COOPERATIVE BANK

    Checking

    Routing: 211371340

    Account: ****1111

    Remove this payment channel

Accounts Using This Payment Channel

  No accounts are using this payment channel.

12. You **Stored Bank Account Information** will display.