

The Regional Income Tax Agency (RITA)

Instructions the Autocalc Individual Tax Return

IF THE BUTTONS ON THIS SHEET DO NOT WORK, YOU NEED TO ADJUST YOUR MACRO SECURITY SETTINGS. CLICK ON THE TOOLS MENU AND CLICK "OPTIONS". CLICK ON THE SECURITY TAB, AND CLICK THE MACRO SECURITY BUTTON. SET MACRO SECURITY TO LOW, AND CLICK OK. CLOSE THE PROGRAM, CLICK "SAVE" WHEN PROMPTED AND RE-OPEN THE PROGRAM.

Autocalc does NOT work for the following situations:

- If you are using Excel for MAC OSX.
- If you are using a version of Microsoft Excel prior to Office 2007.
- You cannot use this Excel based form if you were a resident of a municipality with tax rate structure changes during the year. Instead you can simply use RITA's free eFile software program at www.ritaohio.com. EFile will help you to quickly, easily and securely prepare your tax return.
- You moved during the year and need to report non-wage income. Non-wage income is any income that is reported on Federal Schedule "C" or "E".
- Your employer did not withhold municipal tax for a NON-RITA city.
- Your employer over/under withheld municipal tax.
- You have more than 16 wage entries.
- You did not reside in a RITA municipality anytime during the year.
- The municipalities reported in Schedule J exceed the number of columns provided.

If you are able to use this form, in addition to the instructions for RITA Form 37, please observe the following guidelines. Upon entering your income information, the form will automatically complete Section B.

- Form is for the current tax year only.
- Must have been a full or partial year resident of a RITA municipality.
- Use drop down city name menus in all sections, except in Section A for address changes.
- In Section A, enter social security number, name and address and, if applicable, enter previous address and date of move.
- Enter each wage earned and tax withheld separately in rows 1 through 6 on Section A and, if additional space is needed in rows 1 through 10 in Section A1. **DO NOT DUPLICATE YOUR WAGES IN BOTH SECTION A AND A1. ONLY USE SECTION A1 IF YOU HAVE MORE THAN 6 W-2 FORMS.**
- If you moved during the year, wages and taxes withheld must be prorated and listed separately for each municipality of residence in Sections A and A1. The from and through dates should also be completed in column 6.
- For column 4, you must enter a municipality from the drop down menu. If you do not see your municipality, select one of the Non-RITA options at the end of the list based on the tax rate of your municipality of employment.
- Column 5 in Sections A and A1 must be completed for each wage entered.
- Any tax withheld for your city of residence must be listed in Sections A and A1, column 3.
- If reporting expenses not reimbursed by your employer (IRS Form 2106) enter net wages and net tax withheld in Sections A and A1, columns 1 and 2, AND attach a copy of the 2106 to this form.
- Click on Schedule J tab at the bottom to enter non-wage income in Schedule J. Remember, you cannot use this form if you moved during the year and had non-wage income, the number of cities exceed the number of columns provided, or you were not a resident of a RITA city. Whenever using Schedule J, the municipality of residence must be entered in column 1, box 11.
- You must print each page used separately by depressing the print icon button at the top of each completed page (Sections A, A1, B and Schedule J).
- **Print and mail with payment to RITA, PO Box 6600, Cleveland, OH 44101-2004**
Print and mail without payment to RITA, PO box 94801, Cleveland OH 44101-4801
Print and mail for refund request to RITA, PO Box 89409, Cleveland, OH 44101-6409
Do not send via email. Be sure to sign your return and include all W-2 forms and applicable schedules.