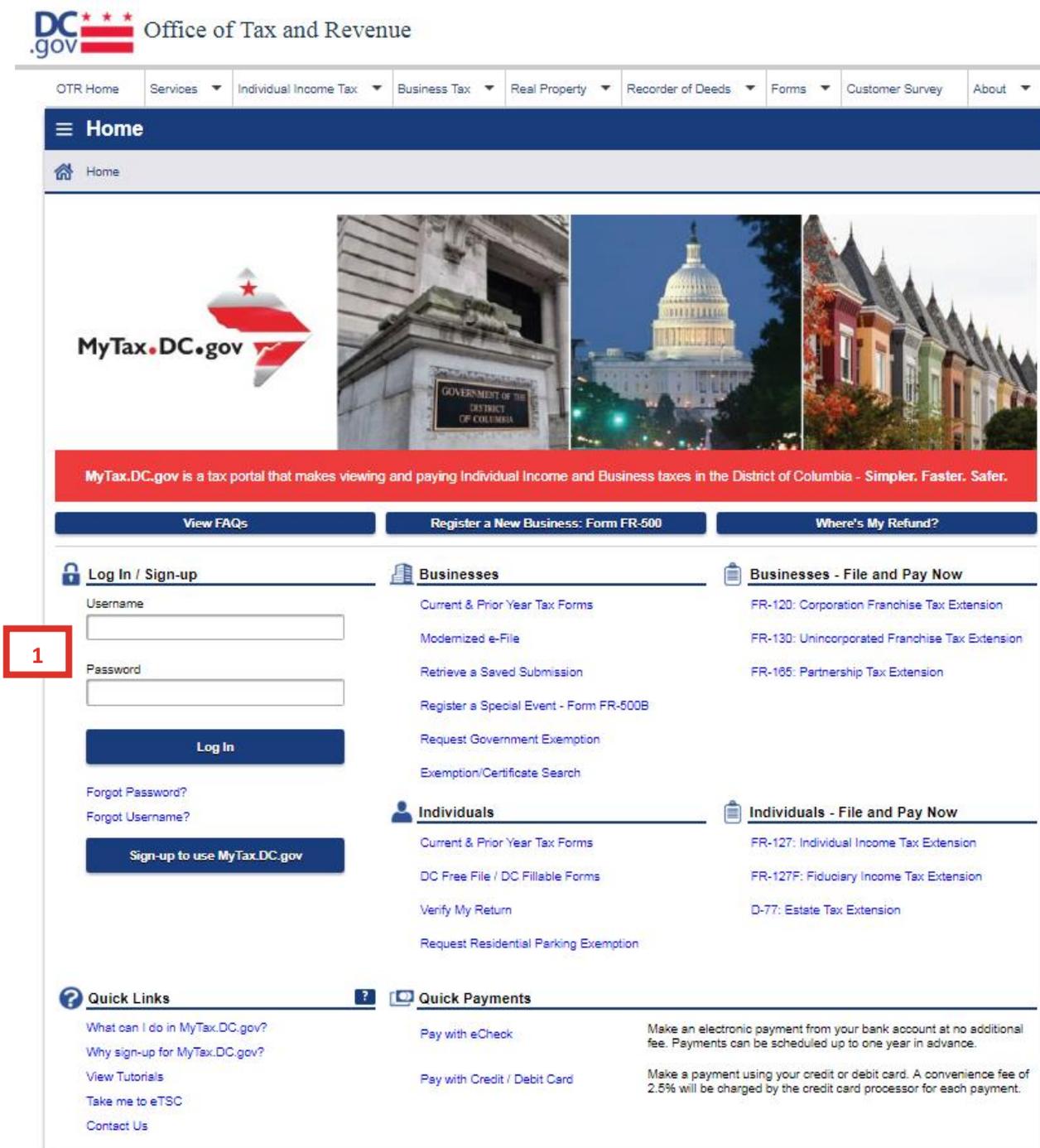


MyTax.DC.gov User Guide: How to Request a Payment Agreement

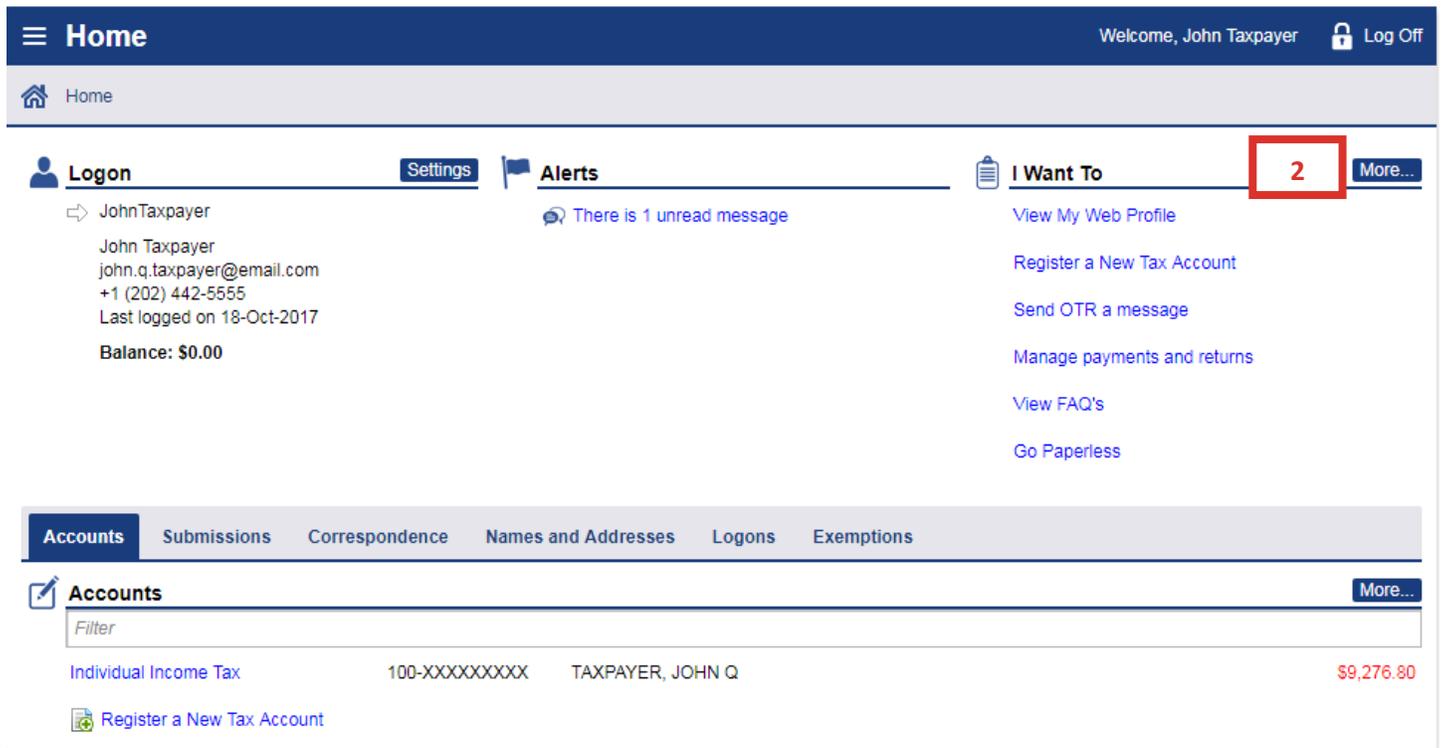
Follow this step-by-step guide to learn how to submit an online payment agreement via [MyTax.DC.gov](https://mytax.dc.gov).

If You are Eligible to Request an Online Payment Agreement



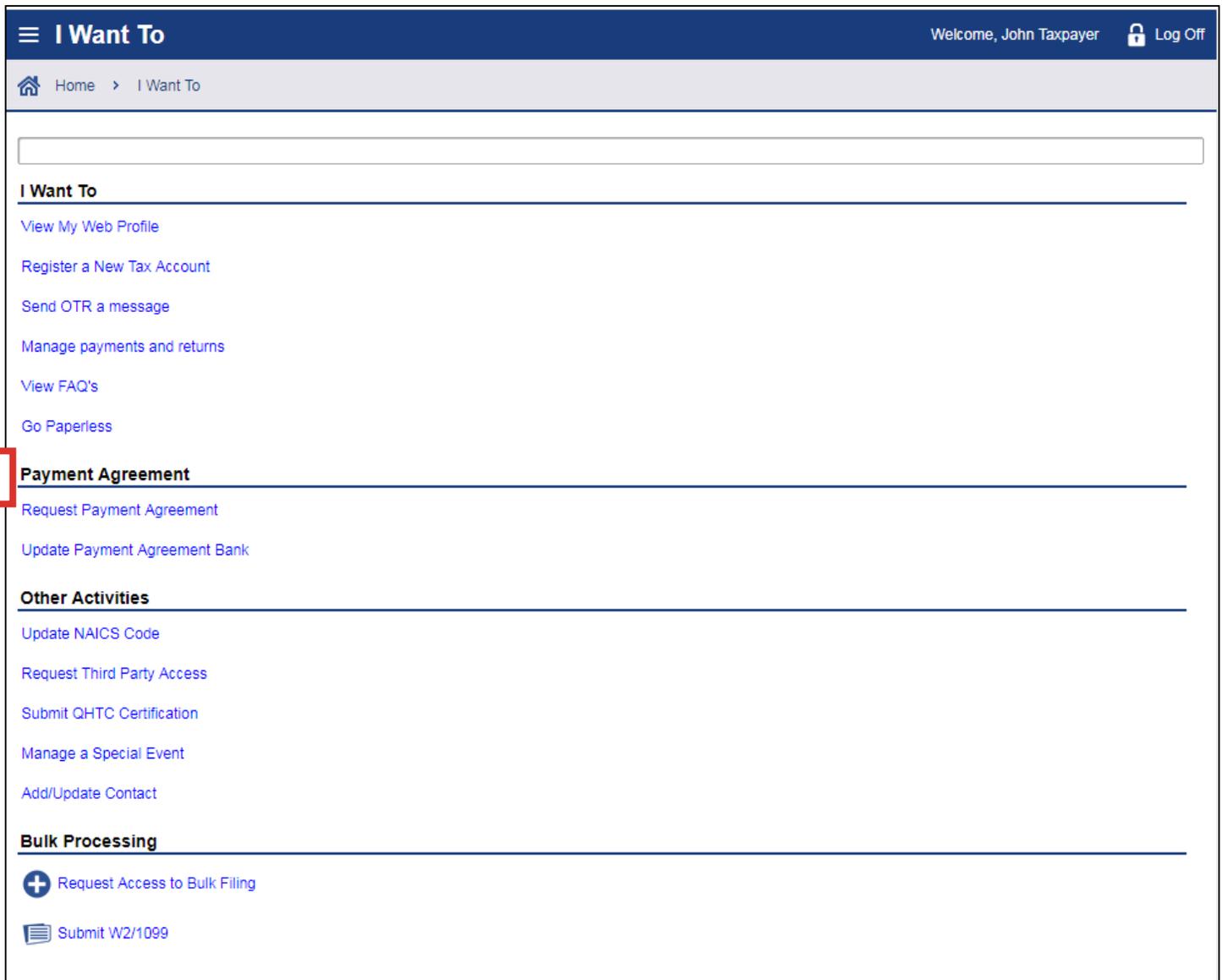
The screenshot shows the MyTax.DC.gov homepage. At the top, there is a navigation bar with links for OTR Home, Services, Individual Income Tax, Business Tax, Real Property, Recorder of Deeds, Forms, Customer Survey, and About. Below this is a 'Home' section with a hamburger menu and a home icon. The main content area features a banner with the MyTax.DC.gov logo and a description: 'MyTax.DC.gov is a tax portal that makes viewing and paying Individual Income and Business taxes in the District of Columbia - Simpler. Faster. Safer.' Below the banner are three buttons: 'View FAQs', 'Register a New Business: Form FR-500', and 'Where's My Refund?'. The 'Log In / Sign-up' section is highlighted with a red box and the number 1. It contains fields for Username and Password, a 'Log In' button, and links for 'Forgot Password?' and 'Forgot Username?'. Below the login section are buttons for 'Sign-up to use MyTax.DC.gov'. The 'Businesses' section includes links for 'Current & Prior Year Tax Forms', 'Modernized e-File', 'Retrieve a Saved Submission', 'Register a Special Event - Form FR-500B', 'Request Government Exemption', and 'Exemption/Certificate Search'. The 'Businesses - File and Pay Now' section includes links for 'FR-120: Corporation Franchise Tax Extension', 'FR-130: Unincorporated Franchise Tax Extension', and 'FR-165: Partnership Tax Extension'. The 'Individuals' section includes links for 'Current & Prior Year Tax Forms', 'DC Free File / DC Fillable Forms', 'Verify My Return', and 'Request Residential Parking Exemption'. The 'Individuals - File and Pay Now' section includes links for 'FR-127: Individual Income Tax Extension', 'FR-127F: Fiduciary Income Tax Extension', and 'D-77: Estate Tax Extension'. The 'Quick Links' section includes links for 'What can I do in MyTax.DC.gov?', 'Why sign-up for MyTax.DC.gov?', 'View Tutorials', 'Take me to eTSC', and 'Contact Us'. The 'Quick Payments' section includes links for 'Pay with eCheck' and 'Pay with Credit / Debit Card', with descriptions of each payment method.

1. From the [MyTax.DC.gov](https://mytax.dc.gov) homepage, log in using your **Username** and **Password**.



The screenshot shows the user interface of MyTax.DC.gov. At the top, there is a navigation bar with a 'Home' button and a user greeting 'Welcome, John Taxpayer' with a 'Log Off' link. Below this is a 'Home' breadcrumb. The main content area is divided into three sections: 'Logon', 'Alerts', and 'I Want To'. The 'Logon' section shows the user's name 'John Taxpayer', email 'john.q.taxpayer@email.com', phone '+1 (202) 442-5555', and last login date '18-Oct-2017', with a balance of '\$0.00'. The 'Alerts' section shows 'There is 1 unread message'. The 'I Want To' section contains a list of links: 'View My Web Profile', 'Register a New Tax Account', 'Send OTR a message', 'Manage payments and returns', 'View FAQ's', and 'Go Paperless'. A red box highlights the number '2' and a 'More...' button next to the 'I Want To' header. Below this is a navigation bar with tabs for 'Accounts', 'Submissions', 'Correspondence', 'Names and Addresses', 'Logons', and 'Exemptions'. The 'Accounts' tab is active, showing a 'Filter' input field and a table with one row: 'Individual Income Tax' with ID '100-XXXXXXXX' for 'TAXPAYER, JOHN Q' and a balance of '\$9,276.80'. A 'Register a New Tax Account' link is also visible.

2. To the right of the **I Want To** header, click the **More** tab.



The screenshot shows the 'I Want To' menu on the MyTax.DC.gov website. The menu is organized into several sections: 'I Want To', 'Payment Agreement', 'Other Activities', and 'Bulk Processing'. The 'Payment Agreement' section is highlighted with a red box around the number '3' and contains the link 'Request Payment Agreement'. Other links include 'View My Web Profile', 'Register a New Tax Account', 'Send OTR a message', 'Manage payments and returns', 'View FAQ's', 'Go Paperless', 'Update NAICS Code', 'Request Third Party Access', 'Submit QHTC Certification', 'Manage a Special Event', 'Add/Update Contact', 'Request Access to Bulk Filing', and 'Submit W2/1099'. The top navigation bar shows 'Welcome, John Taxpayer' and a 'Log Off' button.

3. Under the **Payment Agreement** header, click **Request Payment Agreement**.

☰ Online Payment Agreement for Individu... Welcome, John Taxpayer  Log Off

Home > I Want To > Online Payment Agreement for Individuals and Businesses

1. Online Payment Agreement

Online Payment Agreement 4

If you are financially unable to pay your District of Columbia tax debt immediately, you may use the Office of Tax and Revenue's (OTR) Online Payment Agreement application to request a payment agreement.

Eligibility

You may be eligible to use the online application to apply for an online payment agreement with the OTR if you meet the following requirements:

- Pay the full amount of the tax liability within two years. The online payment agreement term cannot exceed 24 months.
- Filed all required tax returns not included in this online payment agreement.
- Have not had previous online payment agreements canceled.
- Business debt does not exceed \$50,000.

You are **NOT** eligible if:

- Your tax debt has been assigned to a collection agency, or in settlement or offer in compromise stage with OTR.
- Your tax debt has an active garnishment or is in an active bankruptcy.
- You have a linked liability such as an officer assessment.

If you need technical assistance using this portal, please contact OTR's e-Services Unit at (202) 759-1946. For questions or assistance on setting up an online payment agreement, please contact OTR's Collections Division at (202) 724-5045.

Payment Method

Online payment agreements require payment using ACH debit. A direct payment processed as an ACH debit pulls funds from a checking or savings account. ACH debit transactions settle in 1 business day. Payments will be withdrawn from your bank account on the installment due date per your online agreement. After each installment, we will send you a notice detailing the remaining period for the next installment withdraw.

Cancel < P 4a Next >

4. The **Online Payment Agreement** page provides eligibility criteria to apply for an online payment agreement, as well as the **Payment Method** required to participate.
 - a. After you've carefully read over this information, click **Next**.

☰ Online Payment Agreement for Individu... Welcome, John Taxpayer Log Off

Home > I Want To > Online Payment Agreement for Individuals and Businesses

1. Online Payment Agreement 2. Terms and Conditions

Terms and Conditions 5

Terms and Conditions:
By completing and submitting this agreement, you (the taxpayer or your designee) agree to the following terms:

- This agreement will remain in effect until your liabilities (including penalties and interest) are paid in full, the statutory period for collection has expired, or the agreement is terminated. You will receive a notice from OTR prior to termination of your agreement.
- The OTR will re-evaluate this agreement periodically and you (the taxpayer) will provide any requested financial information. The OTR may cancel this agreement if you (the taxpayer or your designee) do not provide the information timely.
- The OTR may change or cancel this agreement if collection is determined to be in jeopardy or information shows that your ability to pay has changed significantly.
- I, (the taxpayer or your designees) agree to the extension of the statute of limitations for collection until the final payment of my tax is paid.
- I, (the taxpayer or designee) agree that this agreement is not inclusive of any unknown liability incurred either before or after the date of this agreement (e.g., audit deficiency, defective check, etc.) The discovery of any unknown liability may be cause for the cancellation of this agreement and the immediate collection of all monies due or the establishment of a new agreement.
- While this agreement is in effect, you (the taxpayer or your designee) agree to file all DC tax returns timely and pay any DC taxes you owe on time.
- The OTR will apply your DC tax refunds or overpayments (if any) to the entire amount you owe, until it is fully paid or the statutory period for collection has expired.
- The OTR will apply the payment to the oldest collection statute, which is normally the oldest tax year or period.
- If you do not make monthly installment payments as agreed, your payment plan will be cancelled.
- You must provide your bank routing number and checking or savings account number to initiate the automated withdrawal of the payment.

If you fail to maintain the terms of this agreement, the OTR will:

- Cancel the agreement and file a tax lien.
- Collect the entire amount owed by levy of income, bank accounts or other assets, or by seizing and selling your property.

Agree to Terms and Conditions 5a 5b

[Cancel](#) [< Previous](#) [Next >](#)

5. Please read the **Terms and Conditions** of the payment agreement.
 - a. Check the box to **Agree to Terms and Conditions**.
 - b. Click **Next**.

☰ Online Payment Agreement for Individu... Welcome, John Taxpayer  Log Off

Home > I Want To > Online Payment Agreement for Individuals and Businesses

1. Online Payment Agreement 2. Terms and Conditions 3. Liability Due

Liability Due **6**

The following liabilities will be included in this payment agreement:

Account Type	Account Id	Filing Period	Balance
Individual Income Tax	100-XXXXXXXX	31-Dec-2015	\$5,789.32
			\$5,789.32

6a

Cancel < Previous Next >

- 6. The **Liability Due** page will display a list of your tax liabilities that will be included in your payment agreement.
 - a. Click **Next**.

☰ Online Payment Agreement for Individu...
Welcome, John Taxpayer Log Off

Home > I Want To > Online Payment Agreement for Individuals and Businesses

1. Online Payment Agreement
2. Terms and Conditions
3. Liability Due
4. Calculate a Plan

Calculate a Plan 7

Total Amount To Be Included In This Online Payment Agreement \$5,789.32

Step 1. What day do you want the online payment agreement to start?

15-Nov-2017
 01-Dec-2017 7a

* Monthly payments will occur on this day.

Step 2. How should we calculate each of your payments?

By this number of months 24 month 7b

By this amount per month \$0.00

To qualify online for this payment agreement, your monthly payments cannot be less than

\$301.41

If you are not able to meet this requirement, please call our Collections Division at (202) 724-5045.

Step 3. Calculate the online payment agreement

Calculate 7c

Step 4. Select an online payment agreement 7d

* Repeat steps 1-3 to calculate another plan. Select a plan to compare the interest savings.

Select	First Payment Due	Number of Installments	Installment Amount	Forecasted Interest	Plan Total	Interest Savings
<input type="radio"/>	15-Nov-2017	6	\$1,103.06	\$174.95	\$5,964.27	\$494.36
<input type="radio"/>	15-Nov-2017	12	\$567.60	\$342.41	\$6,131.73	\$326.90
<input checked="" type="radio"/>	15-Nov-2017	24	\$301.41	\$669.31	\$6,458.63	\$0.00

3 Rows

Cancel
< Previous
Next >

7. **Calculate a Plan** to determine which payment agreement would be best for you.
 - a. **Step 1:** You have the option to start your payment agreement on the 1st or the 15th of the month.
 - b. **Step 2:** You can calculate your payments by the number of months or by the amount per month you would like to pay. **NOTE:** If you choose to pay **by the number of months**, your payment agreement cannot exceed 24 months. Additionally, if you choose to pay **by the amount per month**, the minimum payment required will be displayed to the right inside the blue rectangle.
 - c. **Step 3:** Click **Calculate** the payment agreement.
 - d. **Step 4:** Select a payment agreement. You can calculate additional plans to see the savings you might have with either fewer months or a higher amount paid per month.
 - e. Click **Next**.

☰ Online Payment Agreement for Individu...
Welcome, John Taxpayer Log Off

Home > I Want To > Online Payment Agreement for Individuals and Businesses

1. Online Payment Agreement
2. Terms and Conditions
3. Liability Due
4. Calculate a Plan
5. Schedule

Schedule
8

Your online payment agreement details are as follows:

Installment	Due Date	Beginning Balance	Amount Due	Forecasted Interest	Ending Balance
1	15-Nov-2017	\$6,416.87	\$301.41	\$49.79	\$6,165.25
2	15-Dec-2017	\$6,165.25	\$301.41	\$48.59	\$5,912.43
3	15-Jan-2018	\$5,912.43	\$301.41	\$50.39	\$5,661.41
4	15-Feb-2018	\$5,661.41	\$301.41	\$48.25	\$5,408.25
5	15-Mar-2018	\$5,408.25	\$301.41	\$41.61	\$5,148.45
6	15-Apr-2018	\$5,148.45	\$301.41	\$43.88	\$4,890.92
7	15-May-2018	\$4,890.92	\$301.41	\$40.33	\$4,629.84
8	15-Jun-2018	\$4,629.84	\$301.41	\$39.46	\$4,367.89
9	15-Jul-2018	\$4,367.89	\$301.41	\$36.02	\$4,102.50
10	15-Aug-2018	\$4,102.50	\$301.41	\$34.96	\$3,836.05
11	15-Sep-2018	\$3,836.05	\$301.41	\$32.69	\$3,567.33
12	15-Oct-2018	\$3,567.33	\$301.41	\$29.42	\$3,295.34
13	15-Nov-2018	\$3,295.34	\$301.41	\$28.08	\$3,022.01
14	15-Dec-2018	\$3,022.01	\$301.41	\$24.92	\$2,745.52
15	15-Jan-2019	\$2,745.52	\$301.41	\$23.40	\$2,467.51
16	15-Feb-2019	\$2,467.51	\$301.41	\$21.03	\$2,187.13
17	15-Mar-2019	\$2,187.13	\$301.41	\$16.83	\$1,902.55
18	15-Apr-2019	\$1,902.55	\$301.41	\$16.21	\$1,617.35
19	15-May-2019	\$1,617.35	\$301.41	\$13.34	\$1,329.28
20	15-Jun-2019	\$1,329.28	\$301.41	\$11.33	\$1,039.20
21	15-Jul-2019	\$1,039.20	\$301.41	\$8.57	\$746.36
22	15-Aug-2019	\$746.36	\$301.41	\$6.36	\$451.31
23	15-Sep-2019	\$451.31	\$301.41	\$3.85	\$153.75
24	15-Oct-2019	\$153.75	\$153.75	\$0.00	\$0.00

24 Rows

Cancel

8a
< Previous
Next >

8. The **Schedule** page shows your payment agreement details.
 - a. Click **Next**.

☰ Online Payment Agreement for Individu...
Welcome, John Taxpayer Log Off

Home > I Want To > Online Payment Agreement for Individuals and Businesses

1. Online Payment Agreement
2. Terms and Conditions
3. Liability Due
4. Calculate a Plan
5. Schedule
6. Bank Account

Bank Account 9

Select or add a bank account:
If you have questions regarding this automatic withdrawal, please contact the Collections Division at (202) 724-8045.

Select	Bank	Account Type
<input type="radio"/>	FEDERAL RESERVE BANK - *6789	Checking
<input checked="" type="radio"/>	Add new bank account	

2 Rows

Enter your bank account details:

Bank 9a

Account Type Required Required

Routing Number Required

Account Number Required

Confirm Account Number Required

Cancel
< Previous
Next >

9. The **Bank Account** page is where you will save your bank account information for automatic withdrawal of your funds for your payment agreement.
 - a. Add your **bank account** information, select checking or savings under **Account Type**, enter your bank's **Routing** and **Account Numbers**, and **Confirm Account Number**. **Note:** If you already have a bank account associated with your MyTax.DC.gov registration you may use that account.
 - b. Click **Next**.

Online Payment Agreement for Individu... Welcome, John Taxpayer Log Off

Home > I Want To > Online Payment Agreement for Individuals and Businesses

Online Payment Agreement > 2. Terms and Conditions > 3. Liability Due > 4. Calculate a Plan > 5. Schedule > 6. Bank Account > 7. Review

Review **10**

Tax Liability

Selected Tax Liability:
Individual - JOHN & JANE TAXPAYER Current Balance \$5,789.32

Payment Agreement Detail

Selected Payment Agreement: [Change]

First Payment Due	Number of Installments	Installment Amount	Forecasted Interest	Plan Total
15-Nov-2017	24	\$301.41	\$669.31	\$6,458.63

Bank Account

Selected Bank: [Change]

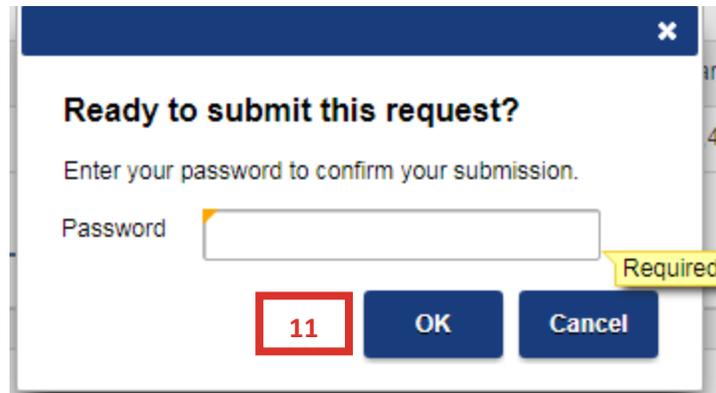
Bank: FEDERAL RESERVE BANK
Account Type: Checking
Routing Number: 011000015
Account Number: *****6789

By clicking Submit, you agree to the terms and conditions of the District of Columbia Office of Tax and Revenue. If you would like to change or cancel your payment agreement after submission, please contact the Collections Division at (202) 724-5045. **10a**

Cancel < Previous Submit

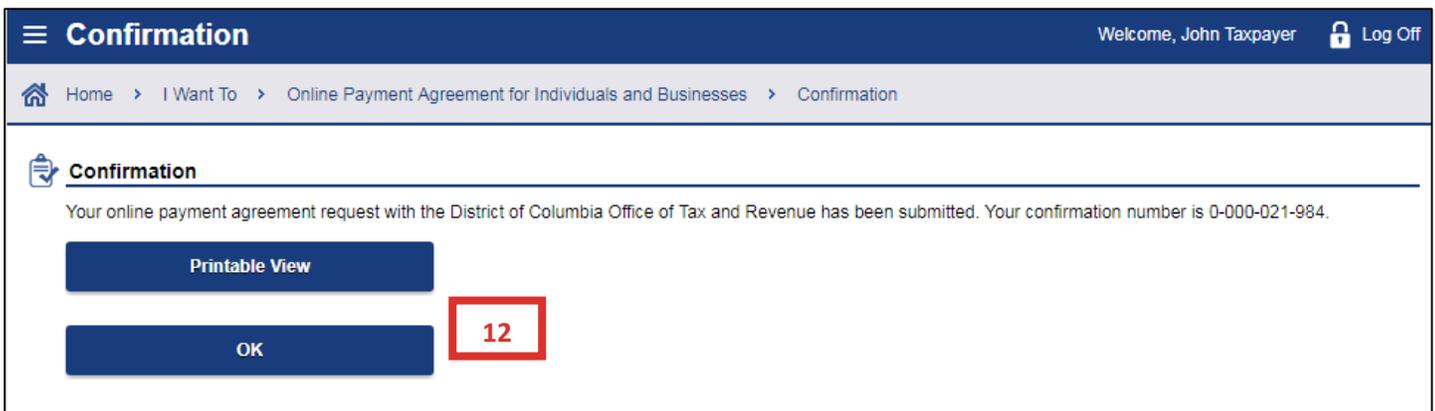
10. The Review page displays your **Tax Liability**, **Plan Detail**, and **Bank Account** information. Please review this section to make sure everything is correct. **NOTE:** Once, you submit your agreement, you cannot change or cancel online. If you need to change or cancel your agreement, you must contact the Collections Division at (202) 724-5045.

- a. Click **Submit**.



11. In the **Ready to submit this request?** pop-up window, enter your [MyTax.DC.gov](https://mytax.dc.gov) password, which will act as your electronic signature. Click **OK**.

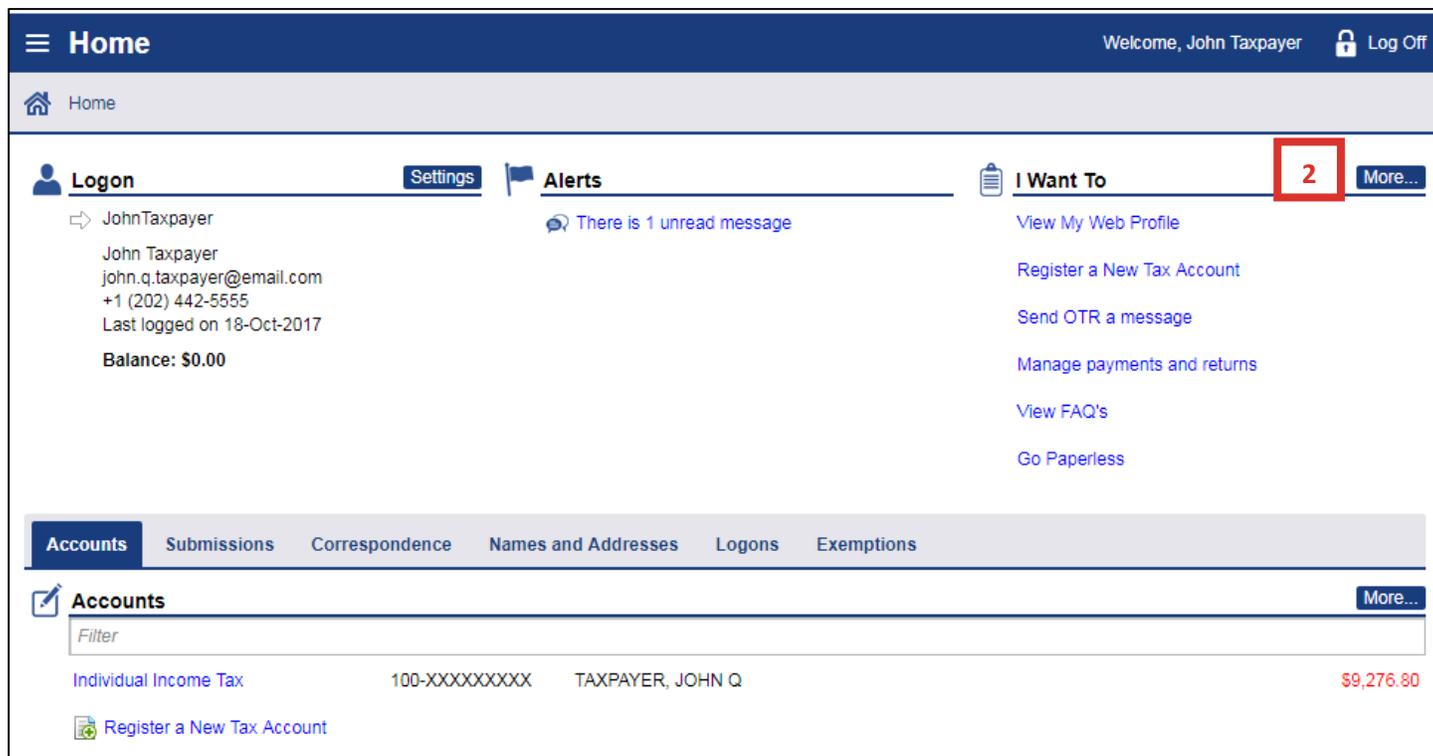
Note: If your pop-up window doesn't display, please check your settings.



12. A **Confirmation** page displays. To obtain a printed copy of this page, click **Printable View**. Otherwise, click **OK**.

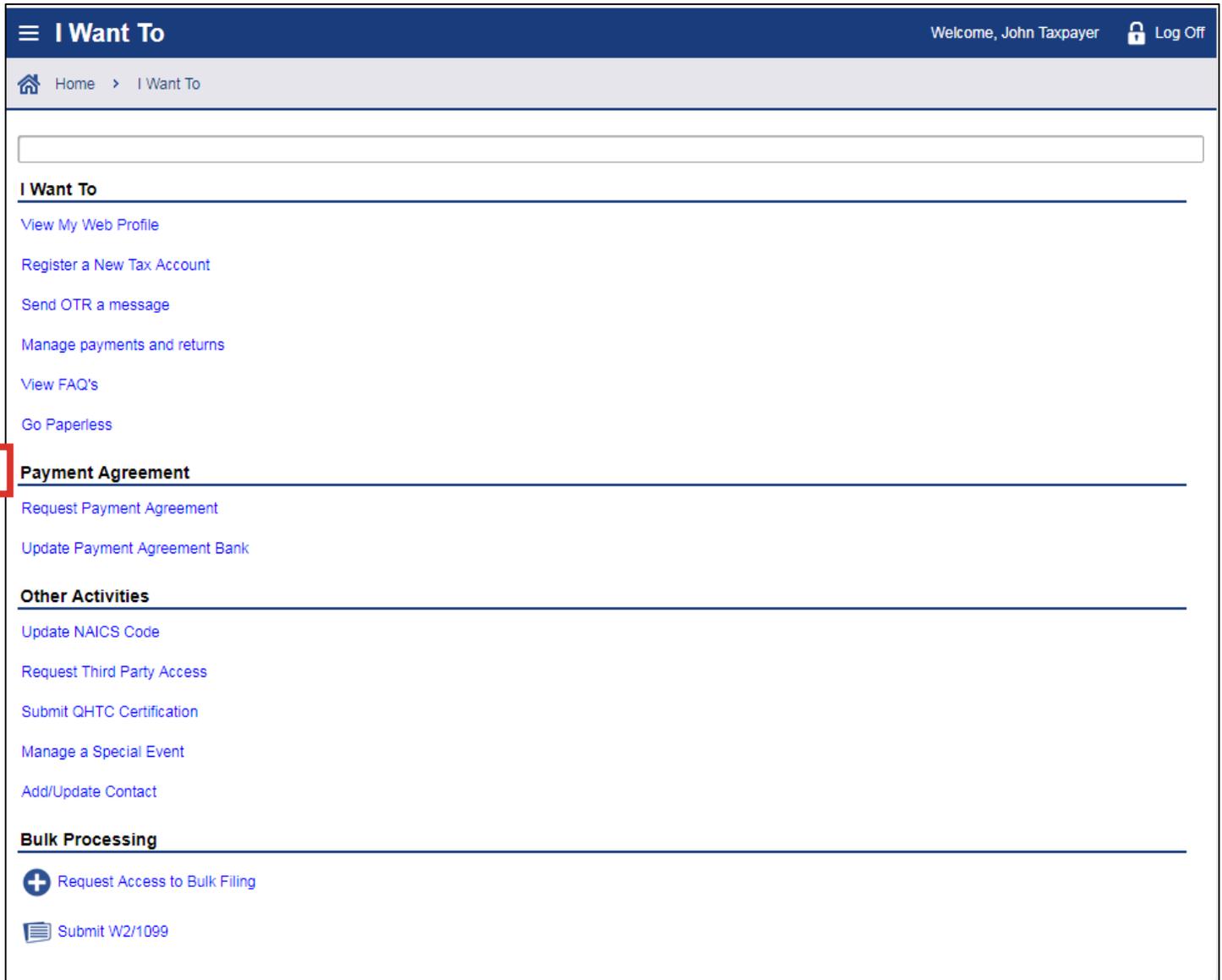
If You are Ineligible to Request an Online Payment Agreement

1. From the [MyTax.DC.gov](https://mytax.dc.gov) homepage, log in using your **Username** and **Password**.



The screenshot shows the user interface for John Taxpayer. At the top, there is a navigation bar with 'Home' and 'Welcome, John Taxpayer Log Off'. Below this is a 'Home' section with three main areas: 'Logon', 'Alerts', and 'I Want To'. The 'Logon' section shows the user's name, email, phone number, and last login date, along with a balance of \$0.00. The 'Alerts' section shows 'There is 1 unread message'. The 'I Want To' section contains a list of links: 'View My Web Profile', 'Register a New Tax Account', 'Send OTR a message', 'Manage payments and returns', 'View FAQ's', and 'Go Paperless'. A red box highlights the 'More...' link at the end of the 'I Want To' list. Below this is a navigation bar with tabs for 'Accounts', 'Submissions', 'Correspondence', 'Names and Addresses', 'Logons', and 'Exemptions'. The 'Accounts' tab is selected, showing a table of accounts with columns for account type, ID, name, and balance. The table contains one entry: 'Individual Income Tax' with ID '100-XXXXXXXXX', name 'TAXPAYER, JOHN Q', and balance '\$9,276.80'. A 'Filter' input field is above the table, and a 'Register a New Tax Account' link is below it.

2. To the right of the **I Want To** header, click the **More** tab.



The screenshot shows the 'I Want To' menu on the MyTax.DC.gov website. The menu is organized into several sections: 'I Want To', 'Payment Agreement', 'Other Activities', and 'Bulk Processing'. The 'Payment Agreement' section is highlighted with a red box around the number '3'. The 'Request Payment Agreement' link is the first item in this section.

I Want To

- View My Web Profile
- Register a New Tax Account
- Send OTR a message
- Manage payments and returns
- View FAQ's
- Go Paperless

3 Payment Agreement

- Request Payment Agreement
- Update Payment Agreement Bank

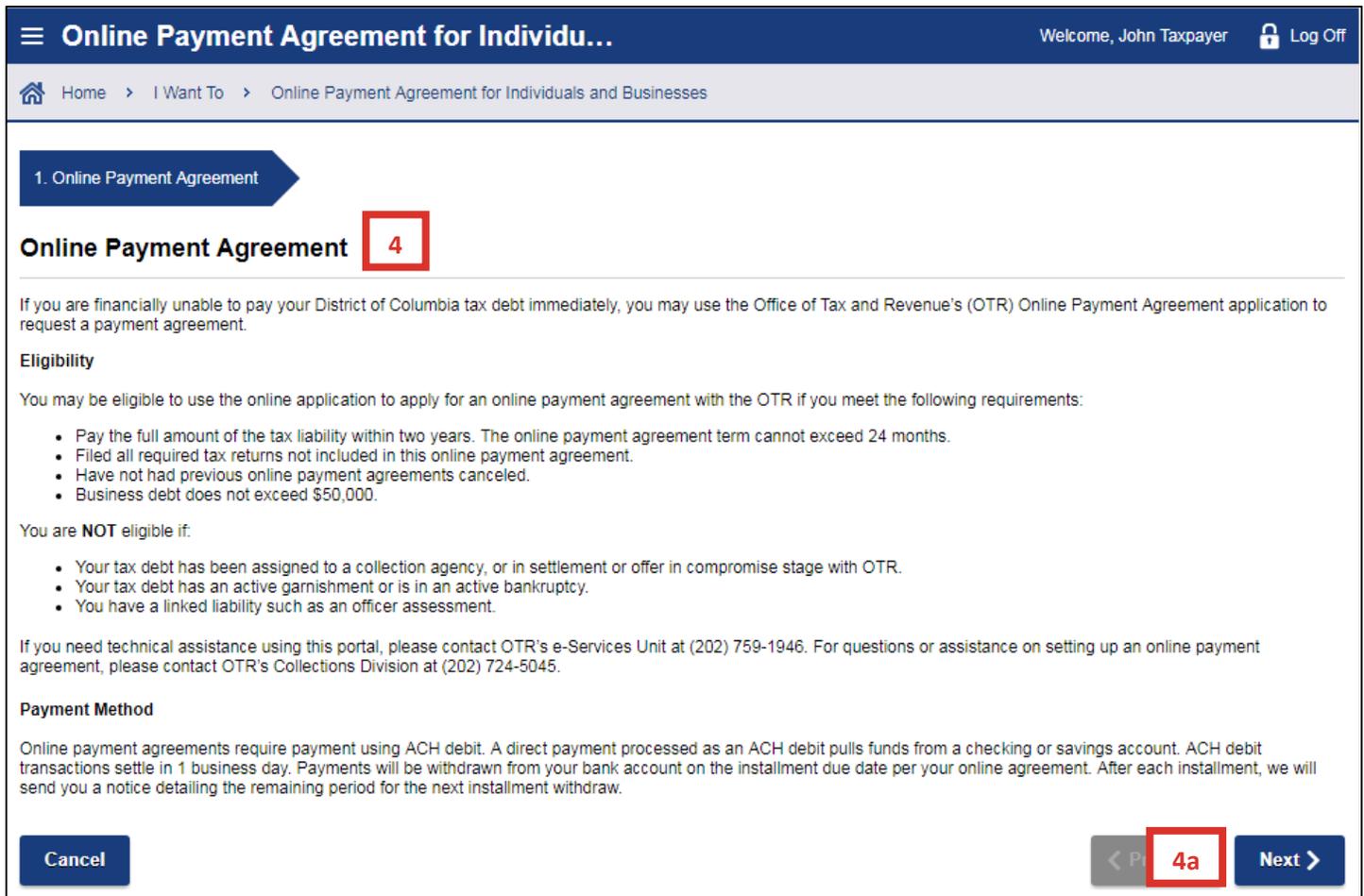
Other Activities

- Update NAICS Code
- Request Third Party Access
- Submit QHTC Certification
- Manage a Special Event
- Add/Update Contact

Bulk Processing

- + Request Access to Bulk Filing
- Submit W2/1099

3. Under the **Payment Agreement** header, click **Request Payment Agreement**.



Online Payment Agreement for Individu... Welcome, John Taxpayer Log Off

Home > I Want To > Online Payment Agreement for Individuals and Businesses

1. Online Payment Agreement

Online Payment Agreement 4

If you are financially unable to pay your District of Columbia tax debt immediately, you may use the Office of Tax and Revenue's (OTR) Online Payment Agreement application to request a payment agreement.

Eligibility

You may be eligible to use the online application to apply for an online payment agreement with the OTR if you meet the following requirements:

- Pay the full amount of the tax liability within two years. The online payment agreement term cannot exceed 24 months.
- Filed all required tax returns not included in this online payment agreement.
- Have not had previous online payment agreements canceled.
- Business debt does not exceed \$50,000.

You are **NOT** eligible if:

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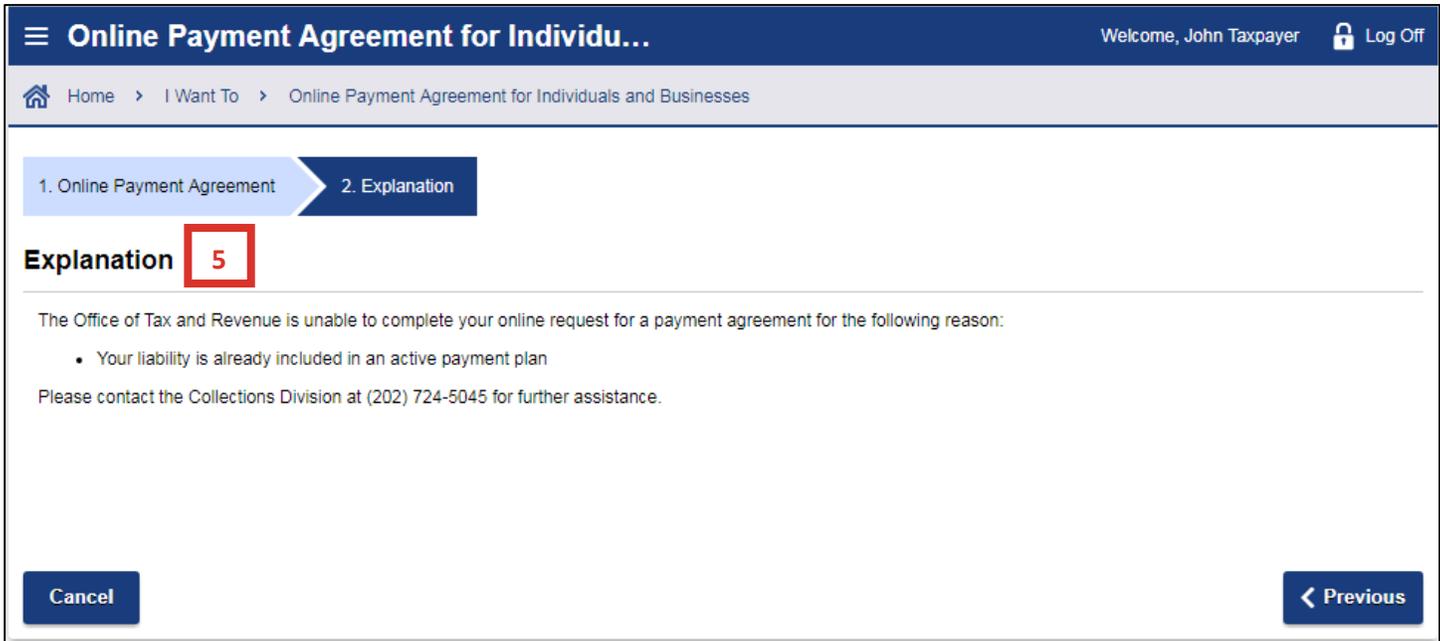
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Cancel < Previous 4a Next >

4. The **Online Payment Agreement** page provides eligibility criteria to apply for an online payment agreement, as well as the **Payment Method** required to participate.
 - a. After you've carefully read over this information, click **Next**.



Online Payment Agreement for Individu... Welcome, John Taxpayer Log Off

Home > I Want To > Online Payment Agreement for Individuals and Businesses

1. Online Payment Agreement 2. Explanation

Explanation **5**

The Office of Tax and Revenue is unable to complete your online request for a payment agreement for the following reason:

- Your liability is already included in an active payment plan

Please contact the Collections Division at (202) 724-5045 for further assistance.

Cancel < Previous

- If the Office of Tax and Revenue is unable to complete your online payment agreement request, you will receive an **Explanation**. For assistance please contact the Collections Division at (202) 724-5045.