FILE A K-5

WITHHOLDING RETURN

Department of Revenue User Guide

Kentucky Department of Revenue

Team Kentucky
Finance and Administration Cabinet

This guide provides step-by-step instructions for filing Kentucky K-5 withholding returns using the MyTaxes system. The guide outlines how taxpayers, business owners, associates, and CPAs can successfully navigate the return-filing process from login to submission. This guide applies to MyTaxes users, those who have created a MyTaxes username and signed in at MyTaxes.ky.gov, as well as Migrated Users with former OneStop, KOG, WRAPS, URGL, or Telecom tax accounts that have transitioned to the new MyTaxes system.

Disclaimer: The information in this presentation is for educational and informational purposes only and does not constitute legal advice. Information is presented as an overall review that is subject to law changes and may not apply to all statutes. Information in this presentation is believed to be accurate as of the date of publication. In the event that any information in this manual is later determined to be in error, this manual cannot be used by taxpayers in supporting a specific position or issue before the Department of Revenue, as it does not constitute statutory or regulatory authority.

User Guide Last Updated: 09/14/2026

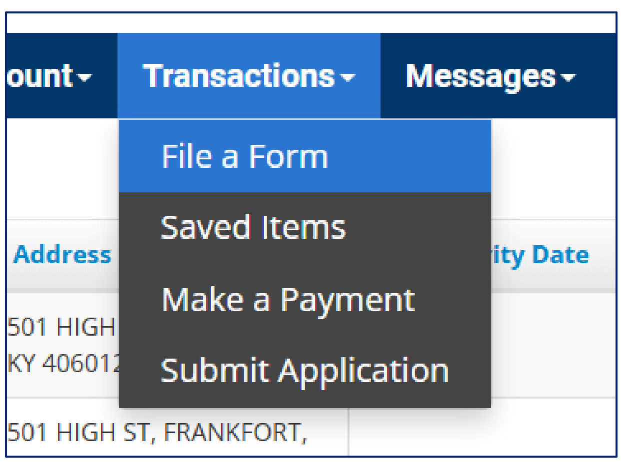
File a Kentucky K-5 Return

Follow the steps below to file a Kentucky K-5 return for your tax account. Please use this guide to report withholding statement information from Forms W-2, Forms W-2G, and Forms 1099 that have not been submitted in the EFW2 or Publication 1220 format. A separate Form K-5 must be filed for each type of Form W-2, Form W-2G, or Form 1099. Other individuals or entities may need to complete a Kentucky K-5 and should consult a tax professional to determine requirements.

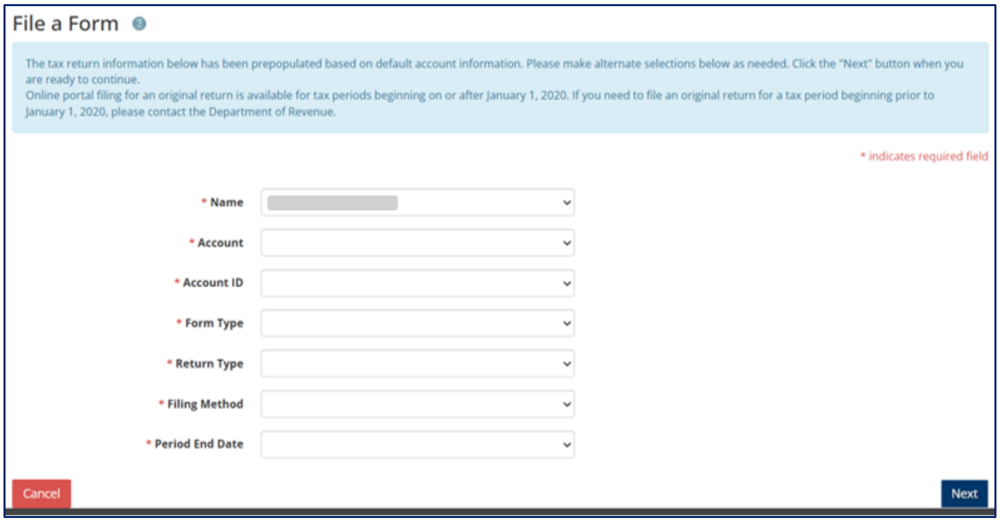
If you have already filed a return and are coming back to the MyTaxes portal to make a payment, proceed to page 15.

1. Log into MyTaxes.ky.gov. Locate the Main Menu ribbon near the top of the page.

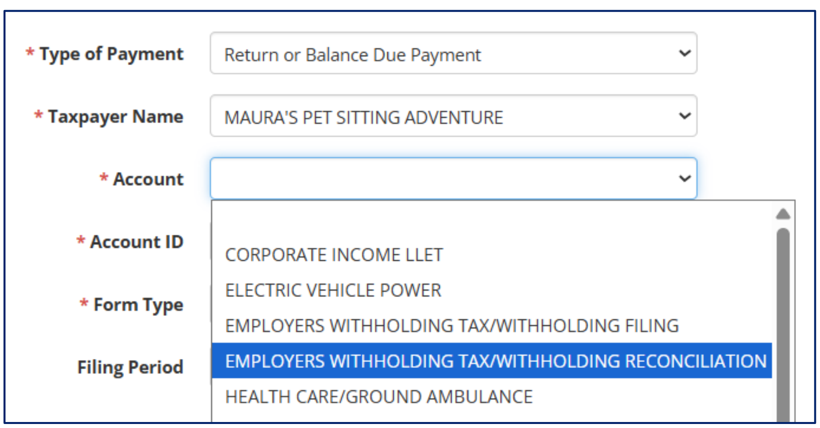
2. From the *Main Menu ribbon*, select the **Transactions** tab then **File a Form**.



3. From the File a Form page, choose the appropriate options from the dropdown menus. All fields are required to be completed, and some may pre-populate based on a selection you make.

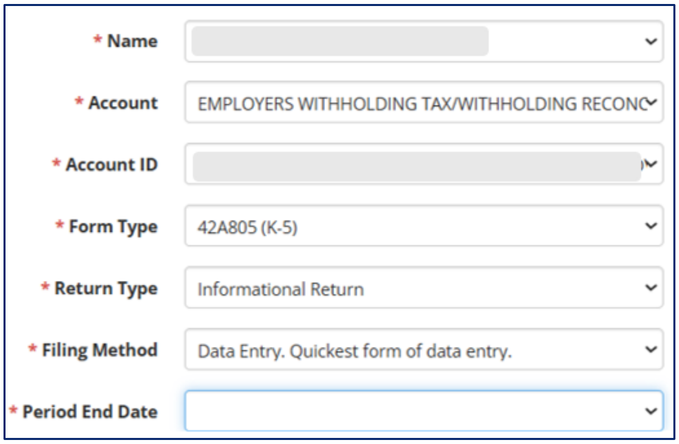


4. Select the **Employers Withholding Tax / Withholding Reconciliation** from the Account dropdown menu.

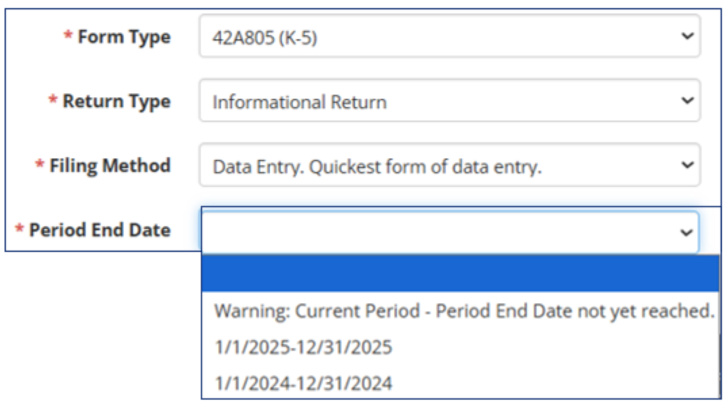


5. If only one associated tax account exists for that account type, the **Account ID, Form Type,** and **Return Type** will populate automatically.

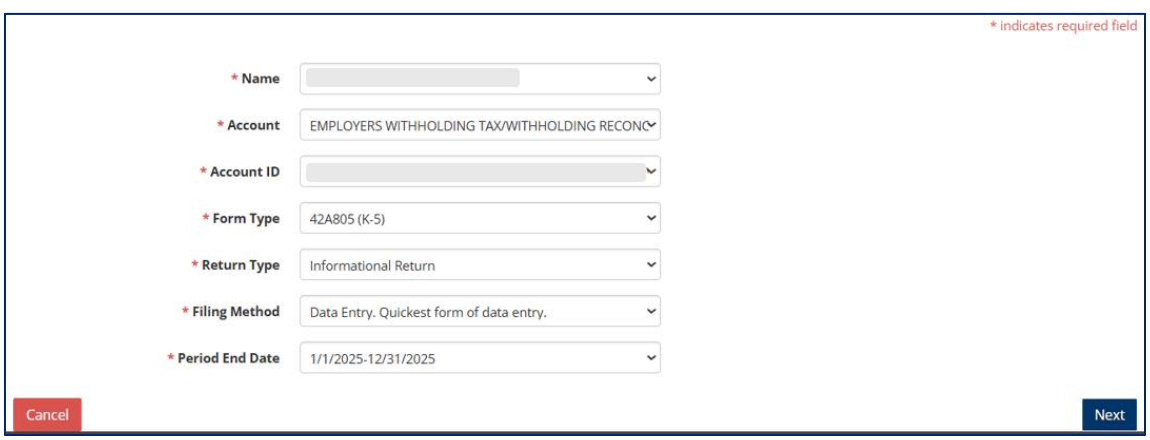
   If there are multiple associated tax accounts for the account type, the user will need to select the appropriate **Account ID** from the dropdown menu.



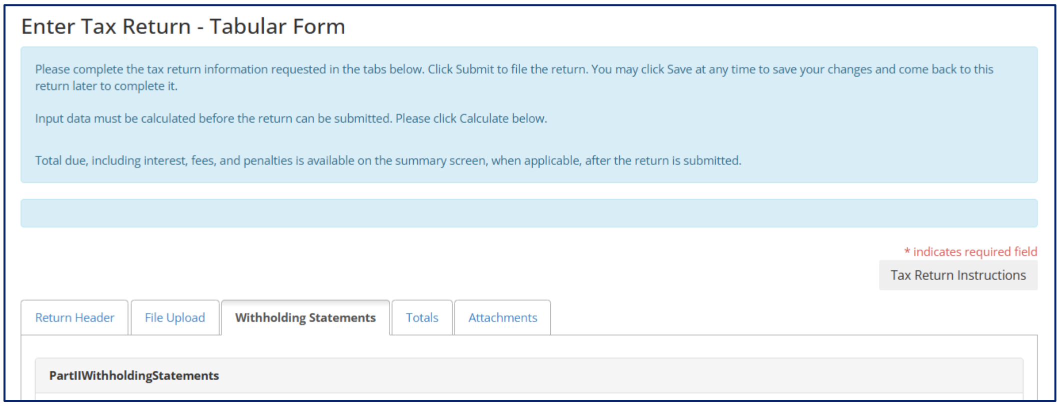
6. Choose the appropriate tax period for which you are filing from the **Period End Date** dropdown menu. Only eligible periods will show in the dropdown menu.



7. Once all dropdown menus have been completed, select **Next** in the bottom right corner.

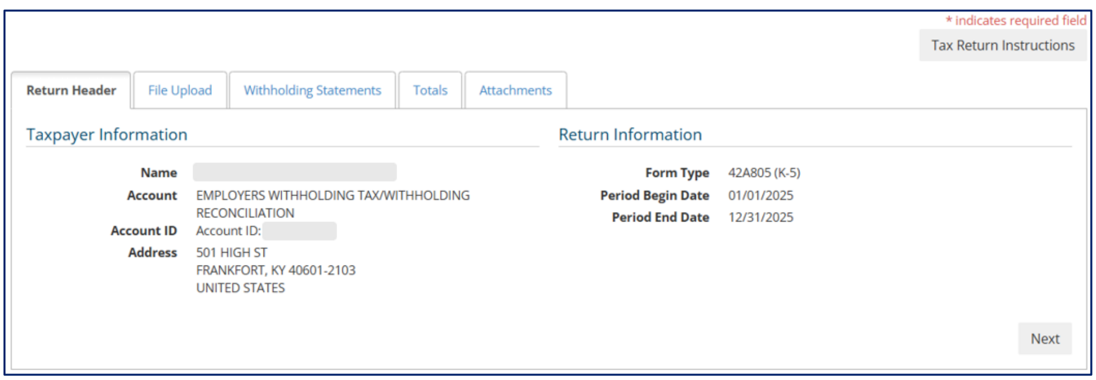


8. On the *Enter Tax Return – Tabular Form* page, use the tabbed dividers to navigate to the areas of the return where information will be entered.

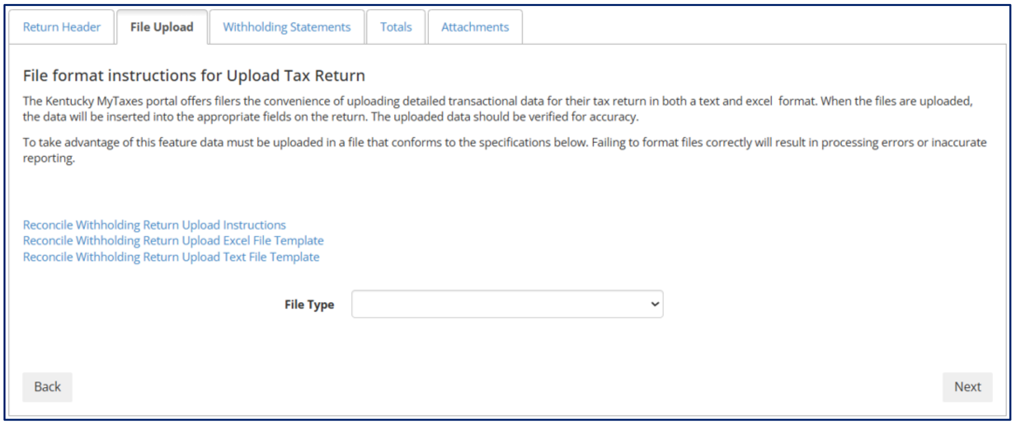


9. The *Return Header* shows Taxpayer and Return Information that will be generated on the submission.

   To the right of the navigation tabs, select the **Tax Return Instructions** button to view instructions and information specific to the return form on the screen.



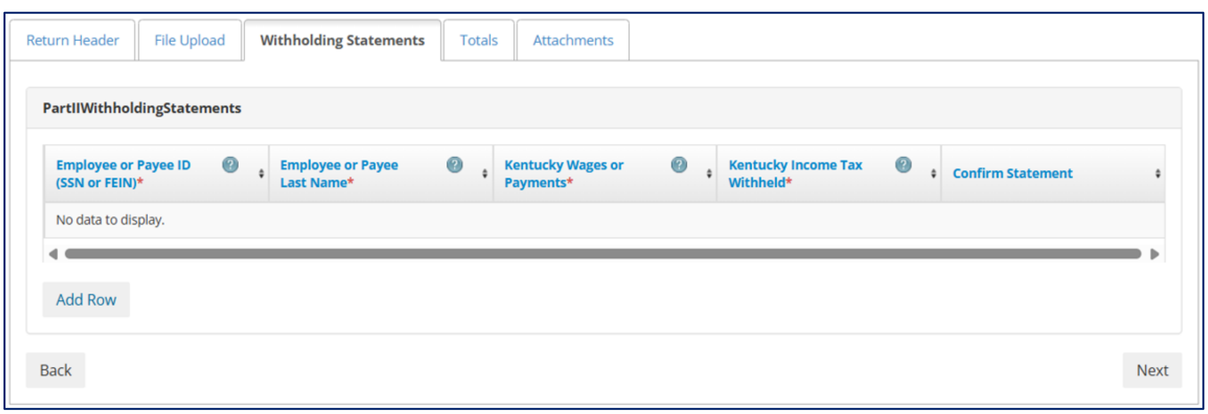
10. The *File Upload* tab allows for uploading detailed transactional data in a text or excel format. Instructions for uploading and templates for Excel and Text files are available on the screen using the links above the *File Type* dropdown box. All information uploaded will appear in the fields of the return and should always be checked for accuracy prior to filing.



11. On the Withholding Statements tab, select the Add Row button to begin entering withholding statement information. Repeat these steps for each withholding statement you need to report by selecting the Add Row button.

The information required for each withholding statement is:

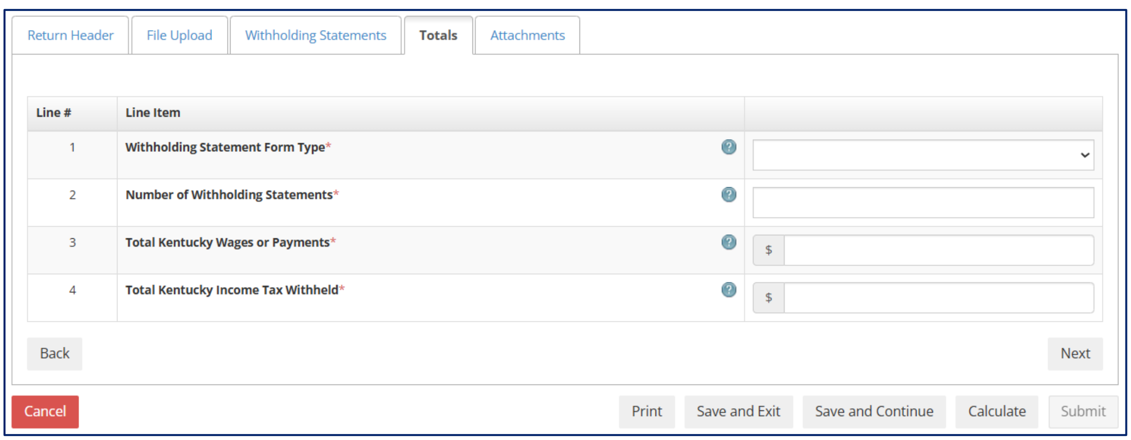
- Employee or Payee SSN or FEIN – enter the full nine-digit number
- Employee or Payee Last Name
- Kentucky Wages or Payments
- Kentucky Income Tax withheld
- Confirm Statement – check box to verify the information entered is correct



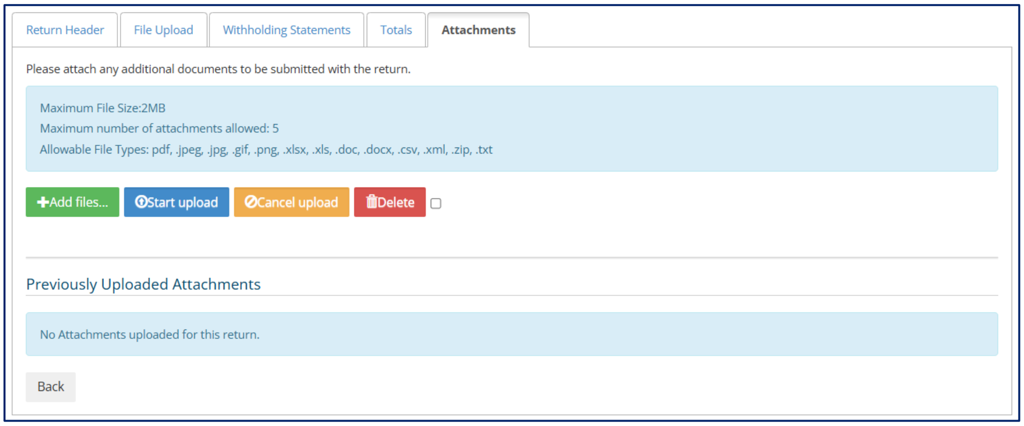
12. Once all applicable fields have been completed, select **Next** to move to the *Totals* tab of the return. Complete fields then select **Calculate**.

Note: the system will check the line-item totals entered on the Withholding Statements tab and the Totals tab. If an error is returned, the return cannot be submitted until the error is corrected.

- **Withholding Statement Form Type –** choose the appropriate Form being reported; options are W-2, W-2G, 1099-R, 1099-MISC, All other 1099, or 1099-NEC.
- **Number of Withholding Statements** – This number should match the number of lines entered on the Withholding Statements tab.
- **Total Kentucky Wages or Payments** – This number should match the total Kentucky wages or payments from all lines entered on the Withholding Statements tab.
- **Total Kentucky Income Tax Withheld** – This number should match the total Kentucky Income Tax withheld from all lines entered on the Withholding Statements tab.



13. Upload any supporting documents to the *Attachments* tab that need to be submitted with the return.

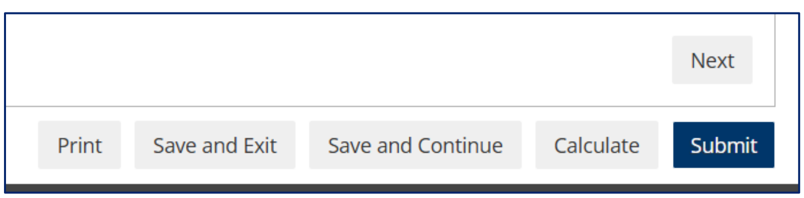


14. Select the **Print** button to print or save the information entered online to a PDF version of the return.

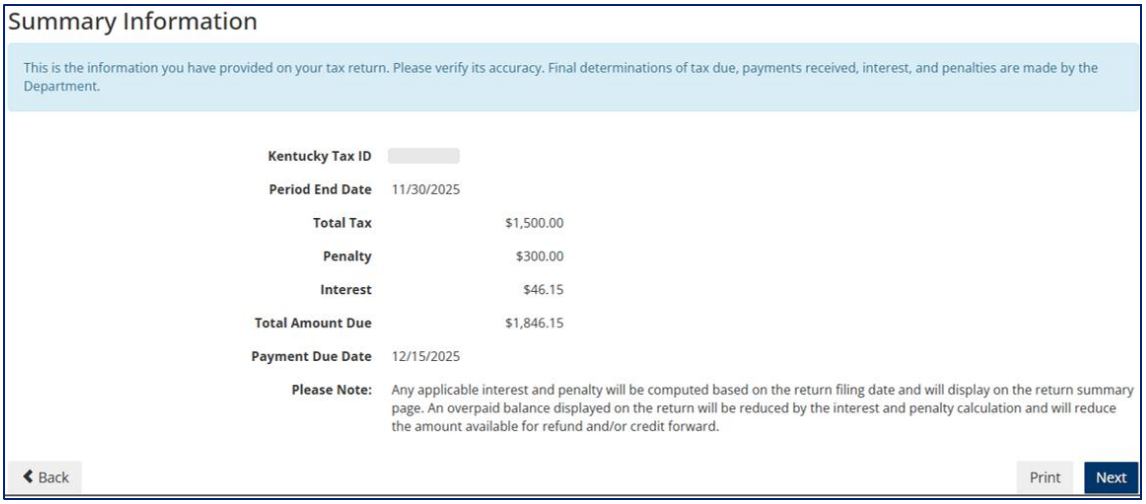
Save and Exit will save all work entered. To access the return later, select **Saved Items** from the **Transactions** menu.

Save and Continue will save all work entered to the Saved Items list while staying on this page.

Submit will only highlight once **Calculate** has been selected. The **Submit** button will move the return process to the next step.



15. Selecting **Submit** will move to the Summary Information page, allowing for confirmation of the information entered. Select **Next** to move forward or **Back** to return and edit information.

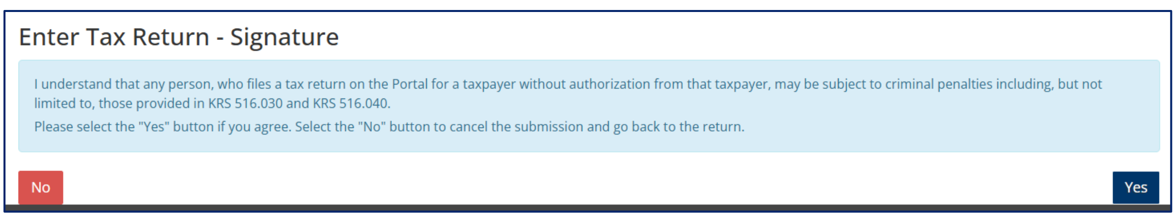

Summary Information

This is the information you have provided on your tax return. Please verify its accuracy. Final determinations of tax due, payments received, interest, and penalties are made by the Department.

Kentucky Tax ID	
Period End Date	11/30/2025
Total Tax	$1,500.00
Penalty	$300.00
Interest	$46.15
Total Amount Due	$1,846.15
Payment Due Date	12/15/2025
Please Note:	Any applicable interest and penalty will be computed based on the return filing date and will display on the return summary page. An overpaid balance displayed on the return will be reduced by the interest and penalty calculation and will reduce the amount available for refund and/or credit forward.

Back Print Next

16. To electronically agree that you are legally authorized to file the tax return, select **Yes** in the bottom right corner. If you are not legally authorized, select **No** to cancel the submission and go back to the return.


Enter Tax Return - Signature

I understand that any person, who files a tax return on the Portal for a taxpayer without authorization from that taxpayer, may be subject to criminal penalties including, but not limited to, those provided in KRS 516.030 and KRS 516.040.

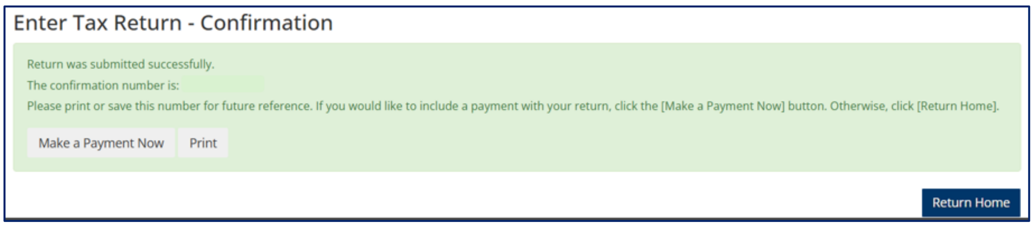
Please select the "Yes" button if you agree. Select the "No" button to cancel the submission and go back to the return.

No Yes

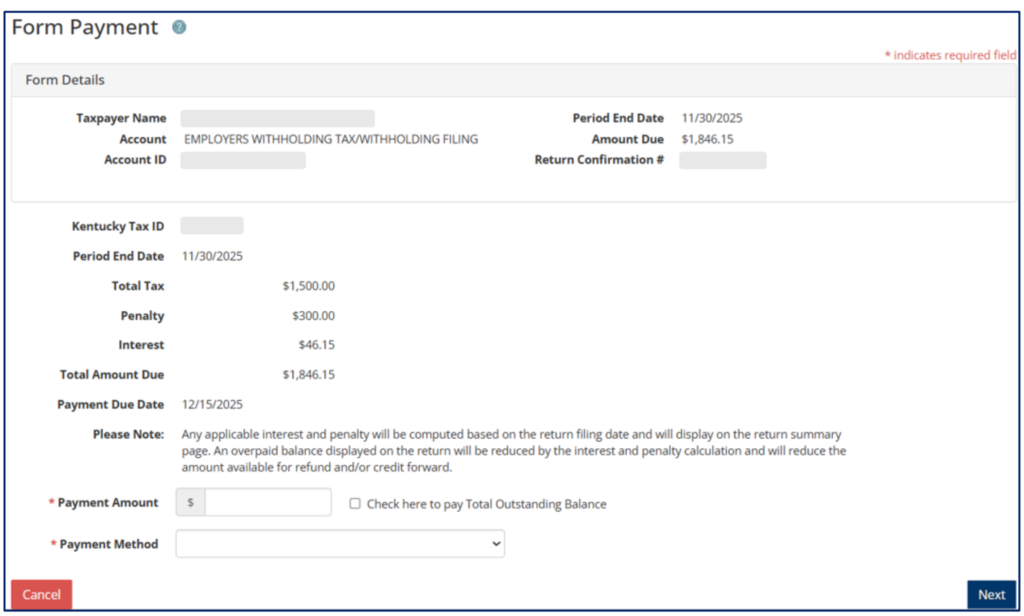
17. The Confirmation page will appear, which will include the confirmation number for the return submission.

You have completed the return submission process. Print this page for your records by selecting the **Print** button.

To navigate to the main Tax Accounts home page, select **Return Home**.
Select **Make a Payment Now** to continue to the payment process for the return.



18. On the Form Payment screen, information about the submitted return will appear, including the tax account information, amount due, and confirmation number. Any applicable penalty and interest amounts will be shown and reflected in the Total Amount Due.

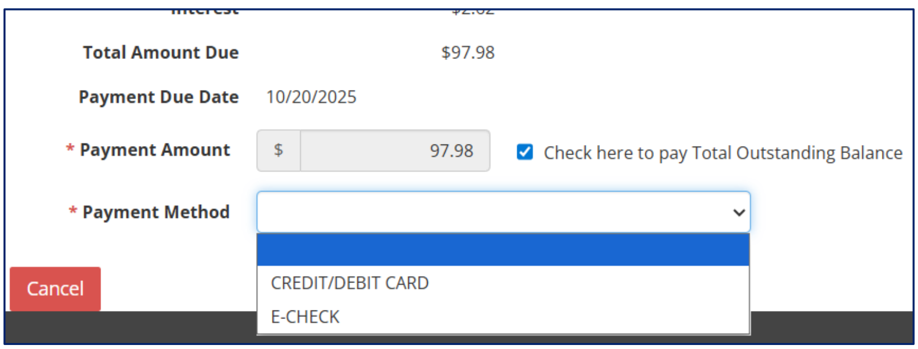


19. Enter the *Payment Amount* or select the box to pay the **Total Outstanding Balance**, then choose the **Payment Method** from the dropdown menu. Select **Next**.

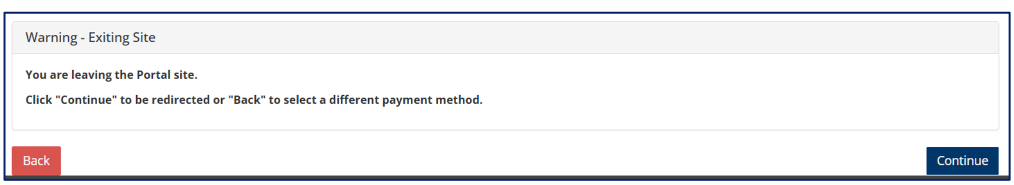
Two online payment methods are available: Credit / Debit Card and E-Check.

Note: There is no fee for using an electronic check. A 1.5% convenience fee applies to debit card payments, and a 2.75% convenience fee applies to credit card payments. Visa, Mastercard, Discover, and American Express are accepted. To pay by phone, please call: 502-564-1900.

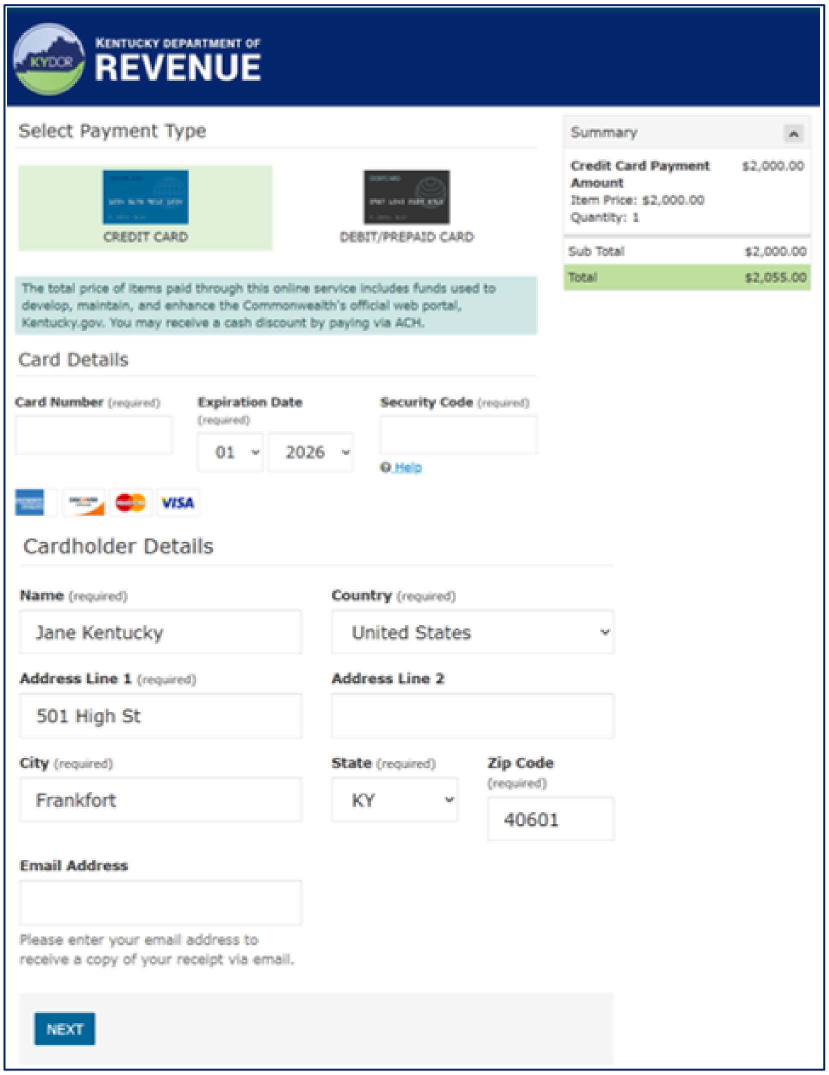
For instructions on completing a *Credit / Debit Card payment*, continue to the next step.
For instructions on completing an *E-Check (electronic check)* payment, continue to step 24, page 13.



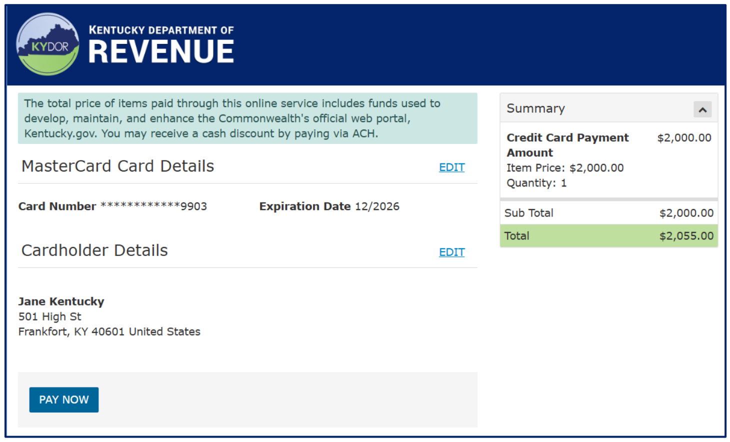
20. If Credit / Debit Card is chosen, you will be directed to the Kentucky Department of Revenue's payment processing site, leaving the MyTaxes Portal. Select **Continue** to proceed with a credit / debit card payment. Select **Back** to change your payment method to E-Check.



21. On the payment screen, select **Credit Card** or **Debit / Prepaid Card** from the icons at the top of the page, then enter the *Card Details* and the *Cardholder Details* and select **Next**.

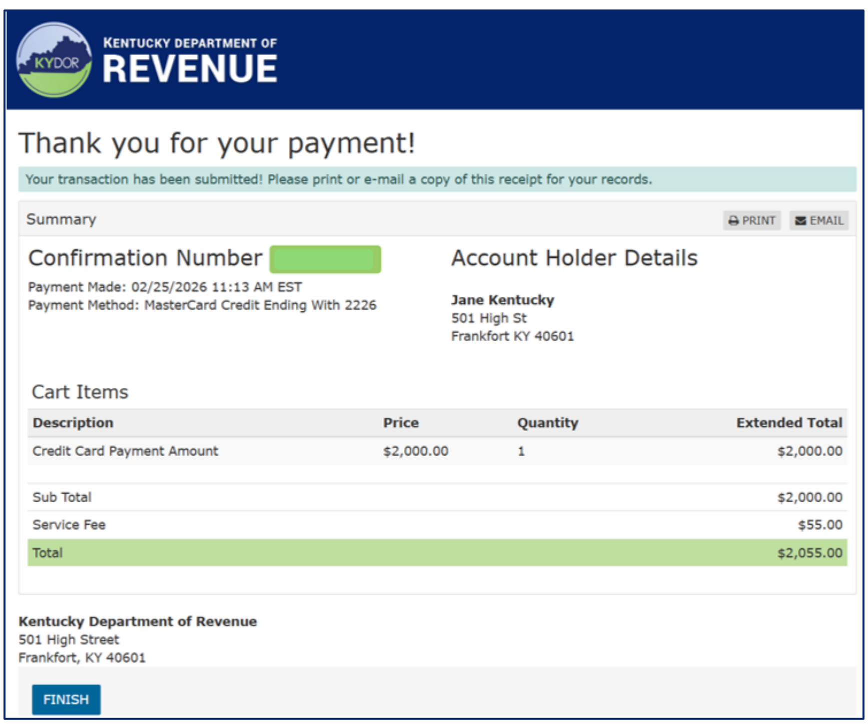


22. The Summary screen will appear. Confirm the details are correct and the total amount to pay is accurate, then select **Pay Now**.

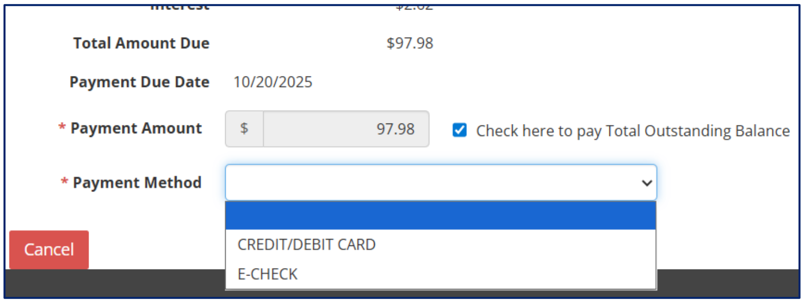


23. The Payment Confirmation page will provide the confirmation number and amount paid.

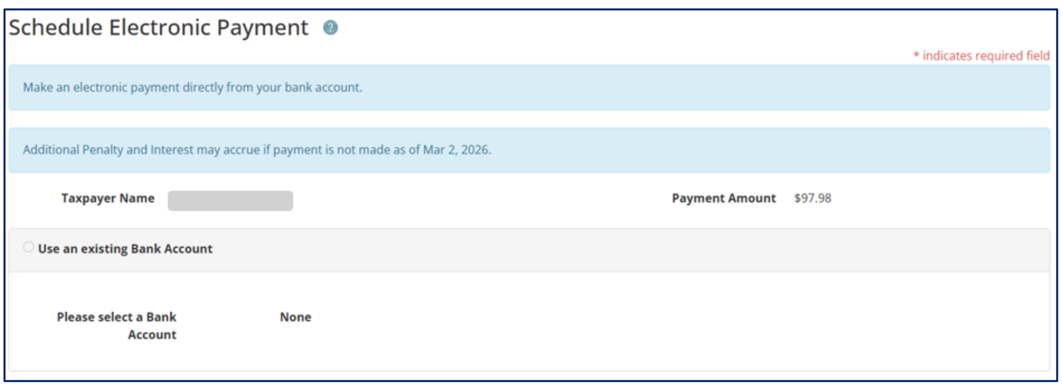
The payment process via Credit / Debit Card is now finished.



24. If E-Check (Electronic Check) was chosen as the payment method, select **Next**.



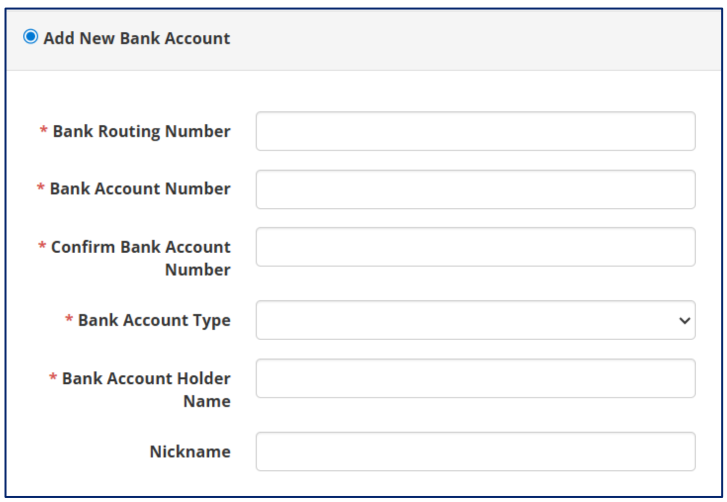
25. On the Schedule Electronic Payment screen, the option to use existing bank account information is available if prior banking information is saved on file.



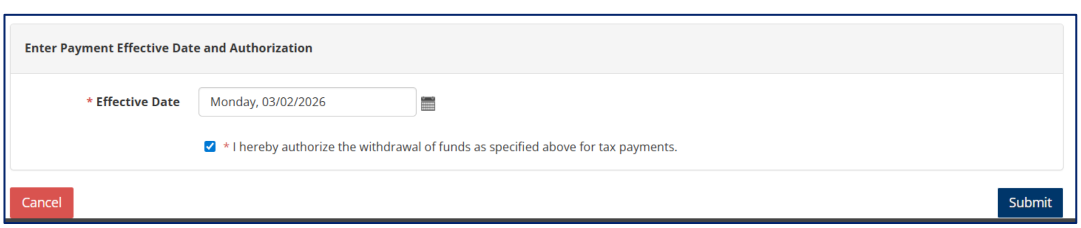
26. If no existing banking information is on file, enter the new banking information requested.

Banking information required:

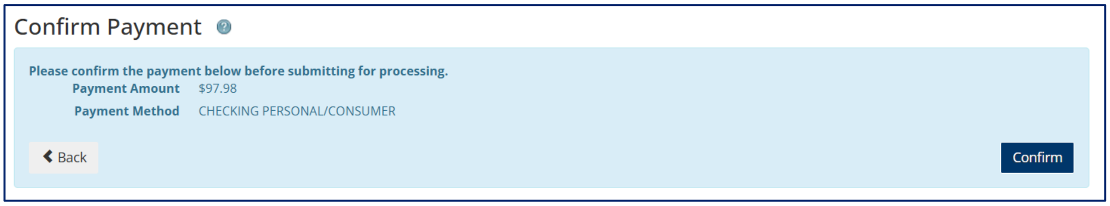
- *Bank Routing Number*
- *Bank Account Number*
- *Bank Account Type:*
    - *Checking Personal / Consumer*
    - *Savings Business / Corporate*
    - *Savings Personal / Consumer*
    - *Checking Business / Corporate*
- *Bank Account Holder Name*



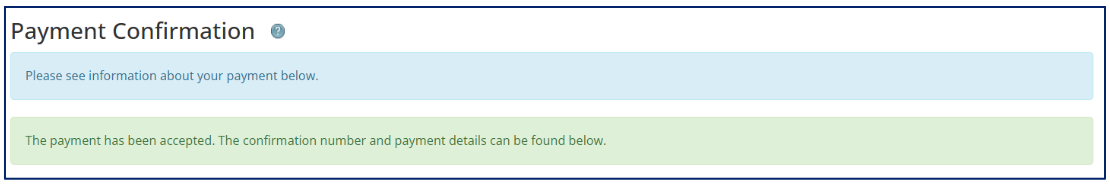
27. Enter the *Effective Date* of the payment and select **the box** to authorize the withdrawal of funds then select **Submit**.



28. On the Confirm Payment screen, verify that the Payment Amount and Payment Method are correct then select **Confirm**.



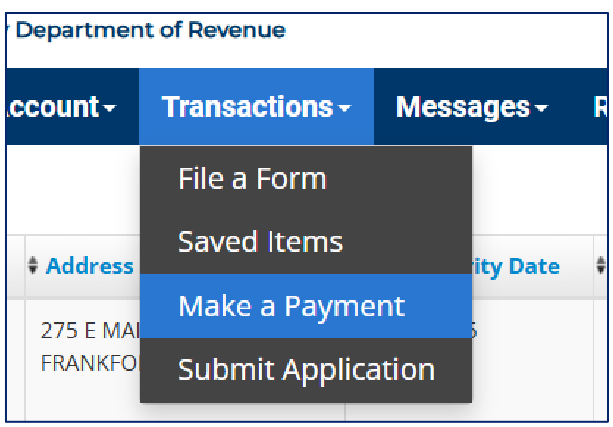
29. The Payment Confirmation screen will appear with a green ribbon confirming submission. All transaction details will be listed below the confirmation ribbon.



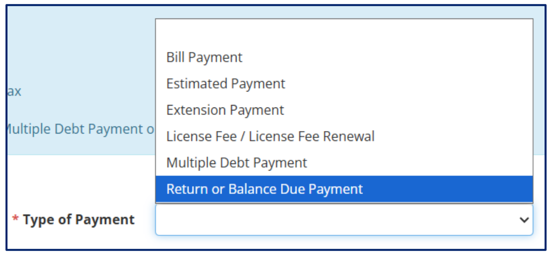
Making a Payment

Follow these steps if you are returning to MyTaxes to make a payment on a previously submitted tax return.

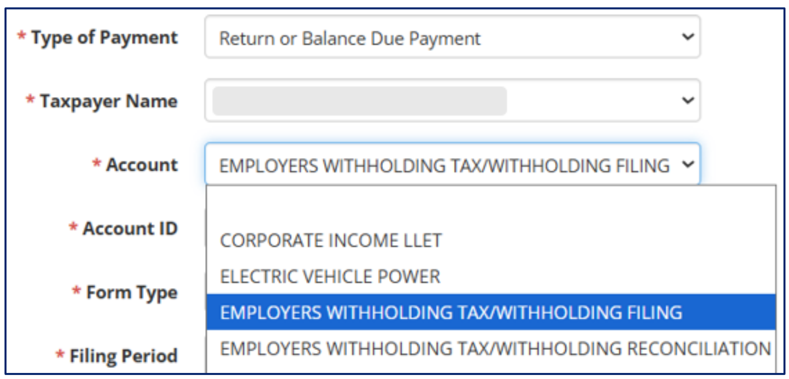
1. From the *Main Menu ribbon*, select the **Transactions** tab then **Make a Payment**.



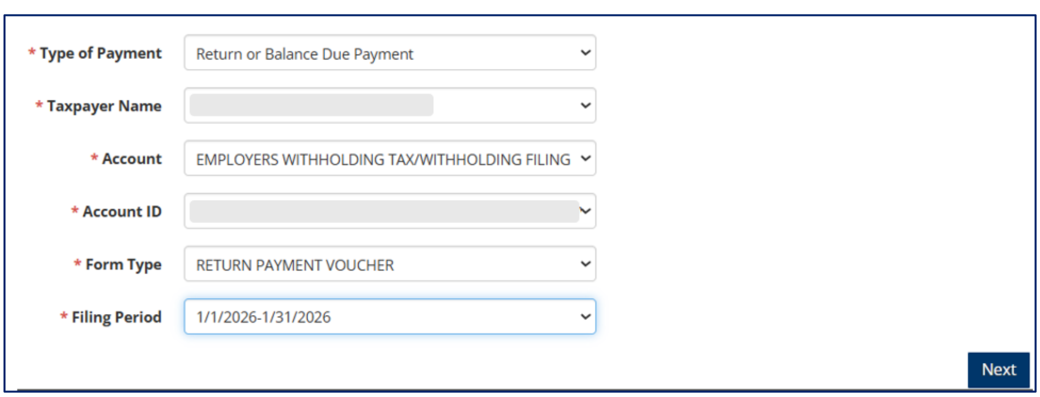
2. Choose *Return* or *Balance Due Payment* from the **Type of Payment** dropdown menu, then select **Next**.



3. The Taxpayer Name will populate. Choose the type of account from the **Account** dropdown.



4. If there are multiple accounts of the same tax type, choose the correct **Account ID** from the dropdown menu. The **Form Type** will automatically populate. If multiple **Filing Periods** are available, choose the correct period from the dropdown menu. Once all options have been chosen, select **Next**.

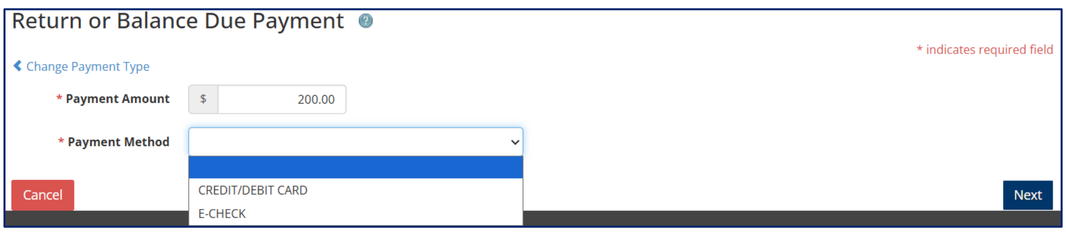


5. Enter the *Payment Amount* then choose the **Payment Method** from the dropdown and select **Next**.

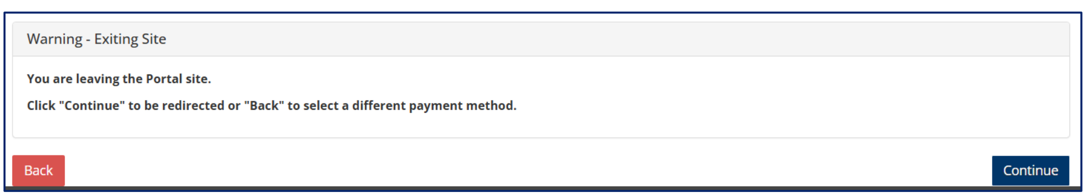
   Two online payment methods are available: Credit / Debit Card and E-Check.

   Note: There is no fee for using an electronic check. A 1.5% convenience fee applies to debit card payments, and a 2.75% convenience fee applies to credit card payments. Visa, Mastercard, Discover, and American Express are accepted. To pay by phone, please call: 502-564-1900.

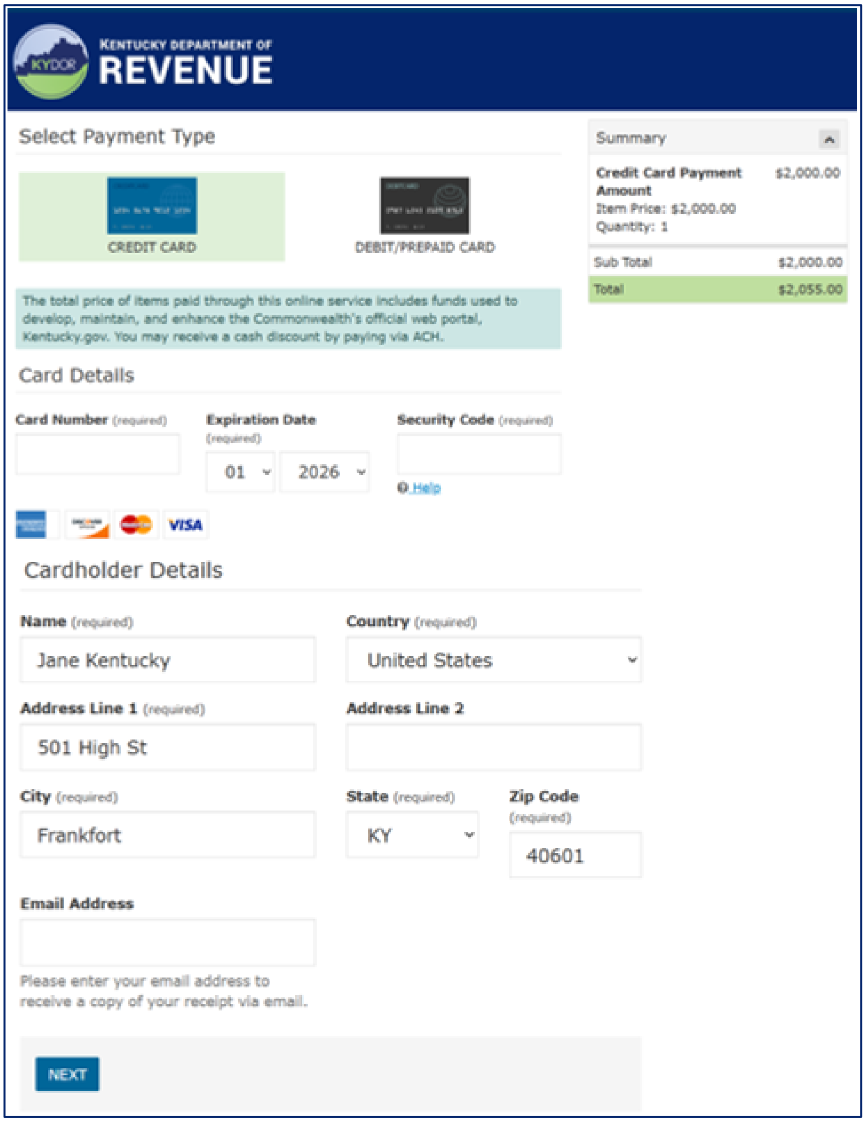
   For instructions on completing a *Credit / Debit Card* payment, continue to the next step.
   For instructions on completing an *E-Check (Electronic Check)* payment, continue to step 10, page 20.



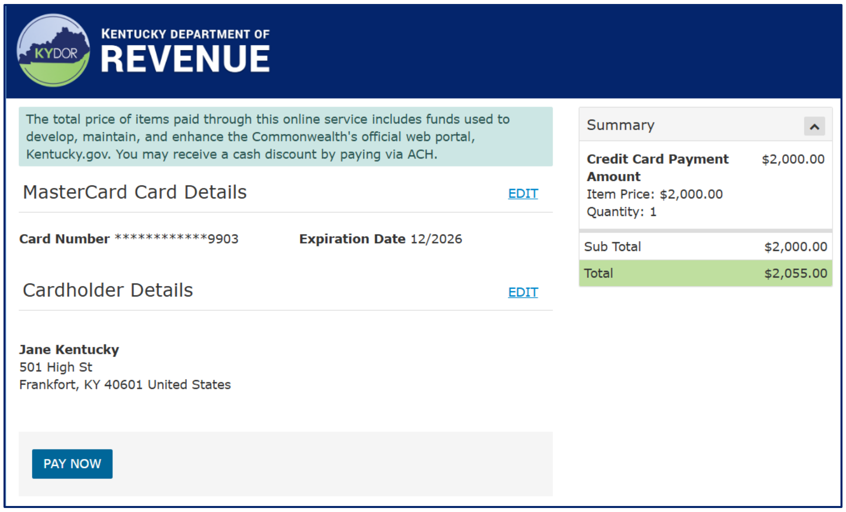
6. If Credit / Debit Card is chosen, you will be directed to the Kentucky Department of Revenue's payment processing site, leaving the MyTaxes Portal. Select **Continue** to proceed with a credit / debit card payment. Select **Back** to change your payment method to E-Check.



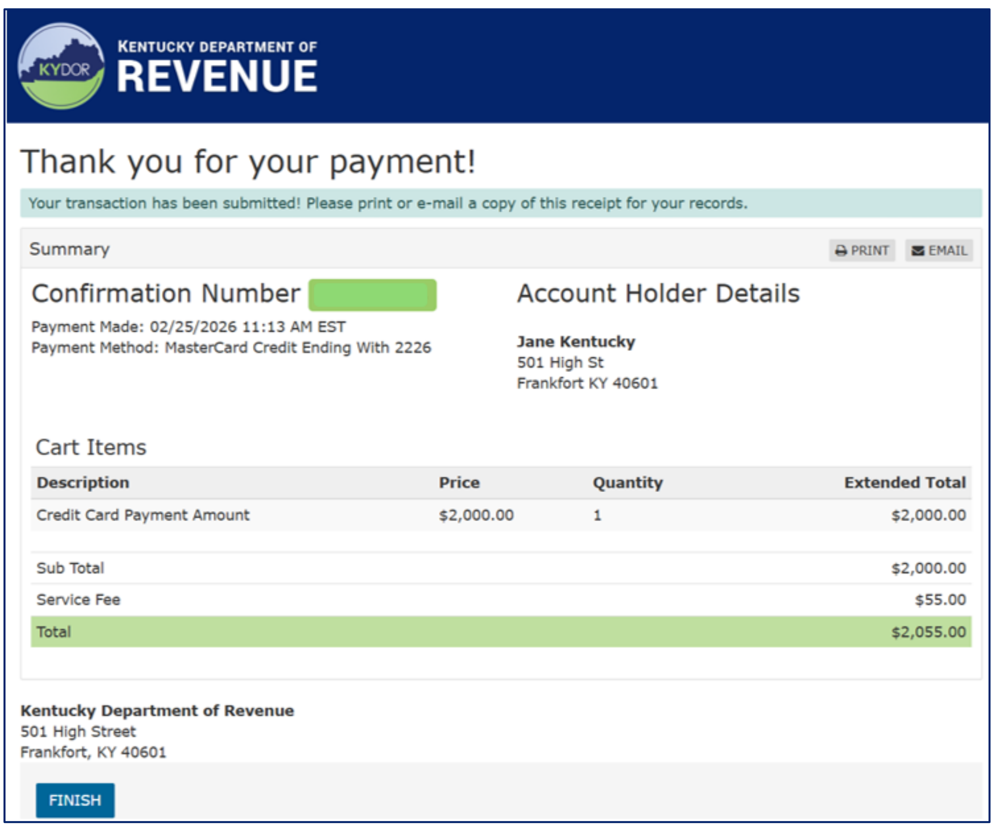
7. On the payment screen, select **Credit Card** or **Debit / Prepaid Card** from the icons at the top of the page, then enter the *Card Details* and *Cardholder Details* and select **Next**.



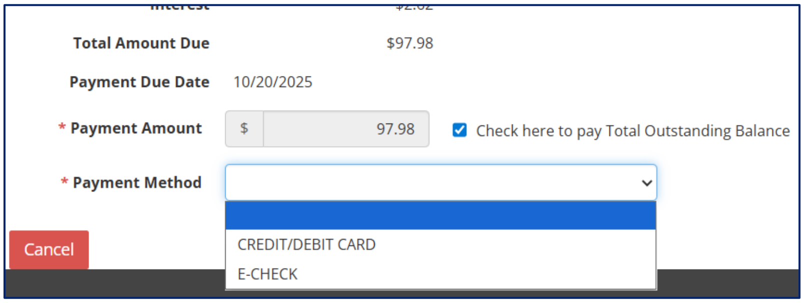
8. The Summary screen will appear. Confirm the details are correct and the total amount to pay is accurate, then select **Pay Now**.



9. The Payment Confirmation page will provide the confirmation number and amount paid. The payment process via Credit / Debit Card is now finished.



10. If E-Check (Electronic Check) was chosen as the payment method, select **Next**.



11. On the Schedule Electronic Payment screen, the option to use the existing bank account information is available if prior banking information is saved on file.

12. If no existing banking information is on file, enter the new banking information requested.

Banking information required:

- *Bank Routing Number*
- *Bank Account Number*
- *Bank Account Type:*
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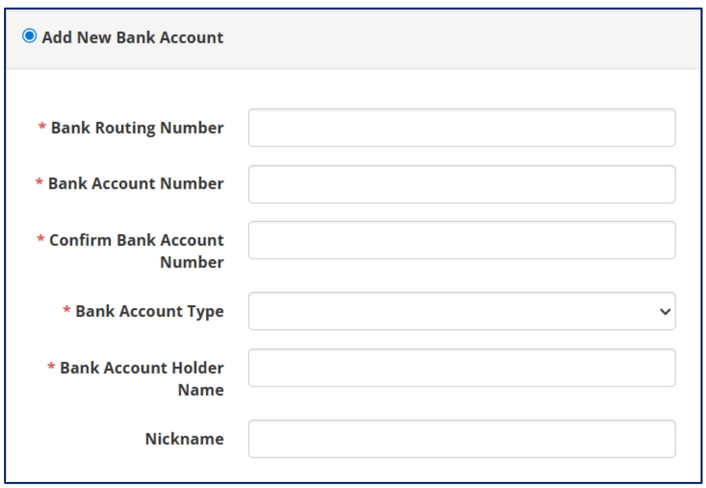
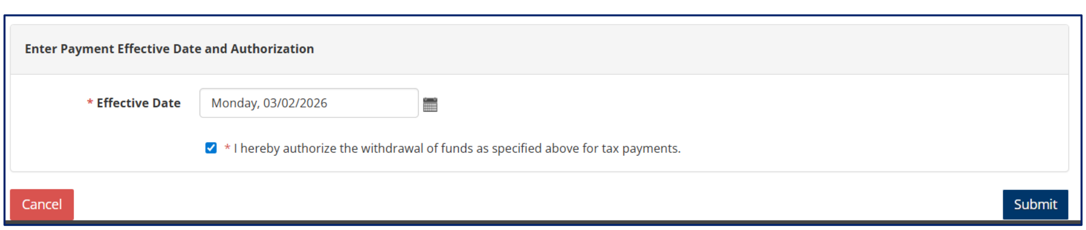
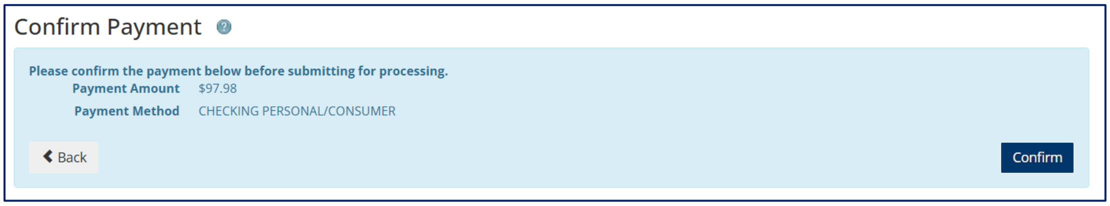
    - *Savings Business/ Corporate*
    - *Savings Personal / Consumer*
    - *Checking Business / Corporate*
- *Bank Account Holder Name*



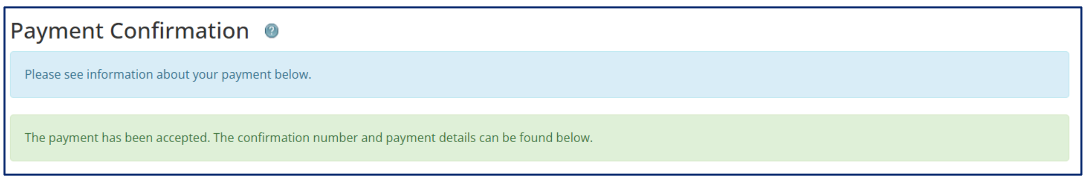
13. Enter the *Effective Date* of the payment and select **the box** to authorize the withdrawal of funds then select **Submit**.



14. On the Confirm Payment screen, verify that the Payment Amount and Payment Method are correct then select **Confirm**.



15. The Payment Confirmation screen will appear with a green ribbon confirming submission. All transaction details will be listed below the confirmation ribbon.



Thank you for doing business in Kentucky. For questions on the process contained in this guide or other MyTaxes Portal questions, please contact the Kentucky Department of Revenue Customer Contact Center at 502764-5555. Representatives are available to assist Kentuckians Monday through Friday, excluding State Holidays.