



Helpful tips to prepare you for IRS Direct File pilot

If you're eligible to use IRS Direct File, see these tips to prepare to file your return.

IRS Direct File is a new choice to file your 2023 federal tax return online for free — directly with IRS.

Direct File is easy to use and you can:

- File your return online in English or Spanish
- Add your tax information with step-by-step guidance
- Live chat with IRS Direct File customer service representatives
- Access it from smartphones, laptops, tablets and desktop computers

Check your eligibility

The IRS Direct File pilot is available to eligible taxpayers who report certain types of income, deductions and credits and live in one of the 12 participating states:

Arizona

California

Florida

Massachusetts

Nevada

New Hampshire

New York

South Dakota

Tennessee

Texas

Washington

Wyoming

Check your eligibility at directfile.irs.gov to determine if IRS Direct File is the right option for you.

Gather your personal information

- **Social Security number** or **individual tax ID number (ITIN)** for you and **anyone else on your return**
- If you e-filed last year, your **self-select PIN**
- If you were a victim of identity theft, your **IP PIN**
- Your current address — **notify IRS if you changed your address**
- Bank account and routing numbers to get a refund by direct deposit

Organize your tax records

- **Form W-2** reporting wages from employers
- **Form SSA-1099** for Social Security benefits
- **Form 1099-G** for government payments such as **unemployment benefits**
- **Form 1099-INT** from banks and brokers showing \$1,500 or less **interest you received**

IRS Direct File is not an option for if you have other types of income such as retirement income, gig economy or business income.

Prepare to claim credits and take deductions

You can claim only the credits and deductions below using IRS Direct File. If you aren't claiming any credits or deductions, you can still use Direct File if you're taking the standard deduction.

You can use IRS Direct File if you only want to claim these credits

- [Earned Income Tax Credit](#)
- [Child Tax Credit](#)
- [Credit for Other Dependents](#)

Direct File pilot is not an option if you claim other [tax credits](#) like the [Child and Dependent Care Credit](#), [Saver's Credit](#) or the [Premium Tax Credit](#) if you had Marketplace health insurance coverage.

You can use IRS Direct File if you only want to claim these deductions

- [Standard deduction](#)
- [Student loan interest](#)
- [Educator expenses](#)

Direct File pilot is not an option for if you [itemize](#) or claim other [tax deductions](#).

Sign-in to Direct File pilot securely

To use Direct File pilot, you need an IRS account with [ID.me](#). If you are an existing ID.me member, do not create another account. You can use your existing account to access Direct File.

If you've never created an ID.me account and are 18 years of age or older, create an account using your personal email and then verify your identity to access Direct File. You only need to verify your identity once — then you can use your ID.me account to access Direct File and other IRS online services.

Verifying your identity is quick and can be done using [self-service](#) or on a [video call](#) with an ID.me agent. [Learn more about the sign-up process for an IRS ID.me account](#) at the ID.me help center.

Prepare to sign your IRS Direct File pilot tax return electronically

When self-preparing your taxes and filing electronically, you must [sign and validate](#) your electronic tax return by entering your prior-year Adjusted Gross Income (AGI) or your prior-year Self-Select PIN.

Since you are using IRS Direct File for the first time, you must enter the information yourself.

There are several ways to find your prior-year AGI:

- On your 2022 tax return, your AGI is on line 11 of the Form 1040.
- Use your [online account](#) to immediately view your AGI on the Tax Records tab.
- Use [Get Transcript by Mail](#). Please allow 5 to 10 days for delivery.

If you have an Identity Protection (IP) PIN (via a CP01A or the Get an [IP PIN Tool](#)), you must enter it when prompted by Direct File. It will serve to verify your identity instead of your prior-year AGI or prior-year Self Select PIN.

Find out more about Direct File

- Visit [Direct File](#) on IRS.gov
- [Direct File Pilot Overview](#) IRS YouTube videos in [English](#) and [Spanish](#)
- [IRS Publication 5952, Still haven't filed your 2023 taxes?](#)
- [IRS Publication 5916, File for free with Direct File pilot](#)
- [IRS Publication 5917, Direct File pilot - What you need to know](#)
- Subscribe to the [Direct File pilot newsletter](#)