



IRS Free File Fillable Forms

User's Guide





Purpose

This document will guide you, step by step, from account creation to transmission of your federal tax return. You can easily search this document. Holding down the Ctrl key and pressing the F key (Ctrl+F) will bring up a search box where you can enter a key word to search.

This program has no age, income or residency restrictions. However, this program is not for you if you are not comfortable with completing a paper return, using only the form and form instructions as a guide to file a correct federal tax return.

If your adjusted gross income (AGI) is \$72,000 or less, you are eligible for [Free File Online](#); easy-to-use, brand-name software at irs.gov/free-file. We encourage you to investigate that option.

What You Will Need:

Have the following on hand before you start.

- Social Security Numbers for all persons on your tax return
- Birth dates for all persons on your return
- The Adjusted Gross Income (AGI) from last year's federal tax return. See [Section 3: Verify Your Identity](#), if you do not know last year's AGI.
- A valid email address
- A U.S. phone number (See the section on [International, Foreign and Military filers](#)).

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Things to Know Before Starting

This program operates from the beginning of each filing season through mid-October (usually October 15) each year. The filing season will extend beyond October 15 if October 15 is on a Saturday or Sunday. If your tax return is rejected at the end of the filing season, you have 5 days to correct any errors and resubmit your return. If you cannot correct the errors in your return, print and [mail it](#).

All accounts and tax return information are erased after the 5-day correction period; usually October 20. After the correction period has expired you will lose access to your account; therefore, it is important that you print a copy of your tax return before the program ends for the year.

1. **Review** the [Forms and Limitations page](#). Although this program supports most forms, if you need an unsupported form, you will not be able to E-File your return. The page also provides form and program limitations that may prevent you from e-filing your return.
2. **Check** the [Computer Requirements](#). Using non-recommended browsers and operating systems can result in form display problems, form calculation problems and problems with the information you have entered. You may not be able to recover from problems arising from use of non-recommended browsers and operating systems.
3. **Familiarize** yourself with the [self-help webpages](#), which answer the most common questions taxpayers have.

Account Creation

1. Even If you used this program in previous years, if you need to “Create an Account” for the current year.
 2. Select “Use Free File Fillable Forms” from the Free File landing page.
 3. Once on the Before Starting page, select “Start Free File Fillable Forms.”
 4. Complete all the required information and select “Create Account”
- A User ID (UID) requires a minimum of four visible keyboard entries, containing no spaces or any of these characters: (< > , ; : ' []. The green check only indicates that the UID provided is not already stored in the database. If an invalid User ID is entered and “Create Account” is clicked, an “Invalid Character” message appears at the top of the page.
5. **Extreme care** must be taken when entering your email address and phone number. If you make errors entering this information you may not be able to recover your account.
 6. Account Creation will not accept foreign phone numbers. See the section on [International, Foreign and Military filers](#).
 7. A confirmation email is sent from **customerservice@freefilefillableforms.com** to the email address used to create the account. If you do not receive this email, review “[Not Receiving Expected Email](#)”.

A Quick View of Form 1040

Form **1040** Department of the Treasury—Internal Revenue Service (99) **2020** U.S. Individual Income Tax Return OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing status Single Married filing jointly Married filing separately (MFS) Head of household (HOH) Qualifying widow(er) (QW)
 Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name if the qualifying person is a child but not your dependent. → **JOHN PUBLIC**

Your first name and middle initial: **MARY R** Last name: **PUBLIC** Your social security number: **123-45-6789**

If joint return, spouse's first name and middle initial: Last name: → *****-**-****** Spouse's social security number: *****-**-******

Home address (number and street). If you have a P.O. box, see instructions. **123 ELM ST** Apt. no. **123**

City, town, or post office. If you have a foreign address, also complete spaces below. **ANYTOWN** State: **AZ** ZIP code: **98765**

Foreign country name: Foreign province/state/county: Foreign postal code:

At any time during 2020, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? Yes No

Standard Deduction Someone can claim: You as a dependent Your spouse as a dependent Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness You: Were born before January 2, 1956 Are blind Spouse: Was born before January 2, 1956 Is blind

Dependents (see instructions):		(2) Social security number	(3) Relationship to you	(4) <input checked="" type="checkbox"/> if qualifies for (see instructions):	Dependent IP PIN(s): Add
(1) First name	Last name			Child tax credit	Credit for other dependents
				<input type="radio"/>	<input type="radio"/>
				<input type="radio"/>	<input checked="" type="radio"/>
				<input type="radio"/>	<input type="radio"/>
				<input type="radio"/>	<input type="radio"/>

Attach Sch. B if required. **1** Wages, salaries, tips, etc. Attach Form(s) W-2 **1** **\$\$\$\$** **1**

2a Tax-exempt interest **2a** **2b** Taxable interest **Add** **2b**

3a Qualified dividends **3a** **3b** Ordinary dividends **Add** **3b**

The radio button for Married Filing Separately has been selected. Note the red arrows showing the placement of the spouse name and SSN. The red boxes on line 1 are an example of additional information areas (description and amount), that a few taxpayers may need. Some of these areas do not have menus for code selection and some of these areas only have one box for entering a description. When you try to enter information into a calculated field, you will receive the "Do Not" symbol.

If you forget your login information, you can access your account through the "Forgot User Id/Password?" option at the bottom of the Sign In box.

Account Recovery: Make sure you correctly enter your email address and phone number. To recover a password or user ID, you must be able to receive email at the email address and a code at the phone number you entered.

You will receive an email from customer_service@freefilefillableforms.com, a text message or call with a confirmation code to verify your identity. This code is needed to complete the account confirmation process. Without it, you will not be able to access the account.

Selecting Areas to Enter Information

Moving within the Forms — Use your mouse or pointing device to select icons, buttons, checkboxes, menu items and to select fields to enter information. Use the scroll bar to view more of the form you have selected.

Entering your Information — Placing your mouse or pointing device over an entry field may display text about what to enter. Please read this information before entering anything into the field.

1. Do not enter extraneous information into the forms. Only enter what is necessary. If you are unsure of what to enter, consult the IRS instructions for the form.
2. Never add forms that do not apply to your tax situation.

When you try to enter an amount on a calculated line, your pointer will change into the “DO NOT” symbol and this message appears: “This field is automatically calculated for you” will also appear below your cursor.

Never use your browser’s back button to move backward in the program.

Negative Numbers generally, you should place a minus sign (-) in front of them.

Never enter unnecessary zeros on any line. Doing so may cause a rejection.

Types of Information Areas on the Forms

Manual Entry Fields — Select a field to enter information. A blue box will surround the field and a blinking vertical line appears, indicating the field will accept information. Once entered, the information entered will appear in green font.

Drop-Down Menu — A down symbol ▾ indicates these areas. The items to select are limited to the acceptable description/code for that line. If you don’t understand the menu choices, the field probably doesn’t apply to you.

The description/code selected from the menu usually has an associated amount to enter. Do not enter amounts in these fields if you have not selected a description/code from the menu. If a menu item you expect to see is not listed, consult the form instructions, review the [Forms and Limitations](#) page and review the [Line-by-Line instructions](#) for the program.

Calculated Fields — These fields calculate when you enter the required information in other parts of the return and select “Do the Math.” If you think the line isn’t calculating properly, view the [Line-by-Line instructions](#) for that form. Calculated information will appear in blue font.

- Sometimes you can manually enter a number into a calculated field if you have not completed the form that transfers information to the calculated field. However, once that form is completed, its information will transfer to the calculated field.
- You cannot override a calculated field. You must change the data used to make the calculation.
- Calculated field information may come from a completed field on another form you have added.
- Calculated fields sometimes require you to enter something into the “[additional information](#)” areas before they will calculate.

If you select direct deposit for your refund, please select either a checking or savings radio button for the type of account

Radio Buttons — These are small round circles. You “Fill in” the circle to provide information. You may only select one radio button from the associated group.

To fill in the circle:

- Use your mouse- Place your cursor on the circle and “left click” or Tap the touchpad on your laptop
- Selecting another radio button from the group will also de-select your previous selection
- To de-select a radio button without making another selection from the group, place your cursor on the radio button and click it.

Checkboxes — These are like radio buttons, except you may select multiple checkboxes within the group. De-select by clicking the box.

Additional Information Areas — The form instructions may direct you to enter additional information on the form. Usually the form instructions say to write something on the dotted line, next to a line number. With Free File Fillable Forms, you can enter this additional information into the small grey fields provided on the line specified in the instructions. Some lines on the forms have many fields to enter additional information. When this happens, it may not be possible to place all the fields in the location specified by the instructions. In this case, additional information areas are placed as close to the area specified. Use your mouse and hover your cursor over each area to view text associated with the additional information area.

The form instructions will state what you should enter, and the order information is entered. In most cases, you will enter a description (or code) and a corresponding amount, in that order. The amount fields will only accept numbers. Description fields may accept letters and/or numbers. Always consult the form instructions before entering information in these fields.

Never enter any information into these fields unless instructed to do so. Extraneous zeros or entering such things as “N/A” will cause your return to reject. Review the [Line-by-Line instructions](#) to assist with these fields.

Description (code) Field — Some description fields have a drop-down menu to assist entering acceptable information. Most taxpayers do not need to enter information in these fields. If you do not recognize the menu items, leave the field blank and review the form instructions to determine if the menu items apply to your tax situation.

Amount Field — Never enter an amount into these fields if you leave the corresponding description field blank. Some amount fields do not have a corresponding description field.

See the Quick View of Form 1040: Line 1 has additional information areas: A description (code) field an amount field.

See the screenshot below. On Schedule 1, line 8 will not calculate any amount in the column until you enter your “other income” amount in the designated amount field, to the left of the column, and select “Do the Math.” You must also enter a corresponding description for the other income, otherwise, the return will reject.

Attaching Statements — This program does not support attaching any supplemental statements. If you are instructed to attach a statement to clarify an entry, you will not be able to E-File your return using this program. Print and mail in the return.

8	Other income. List type and amount ▶	GAMBLING WINNINGS	or		
		Amount	500	8	500

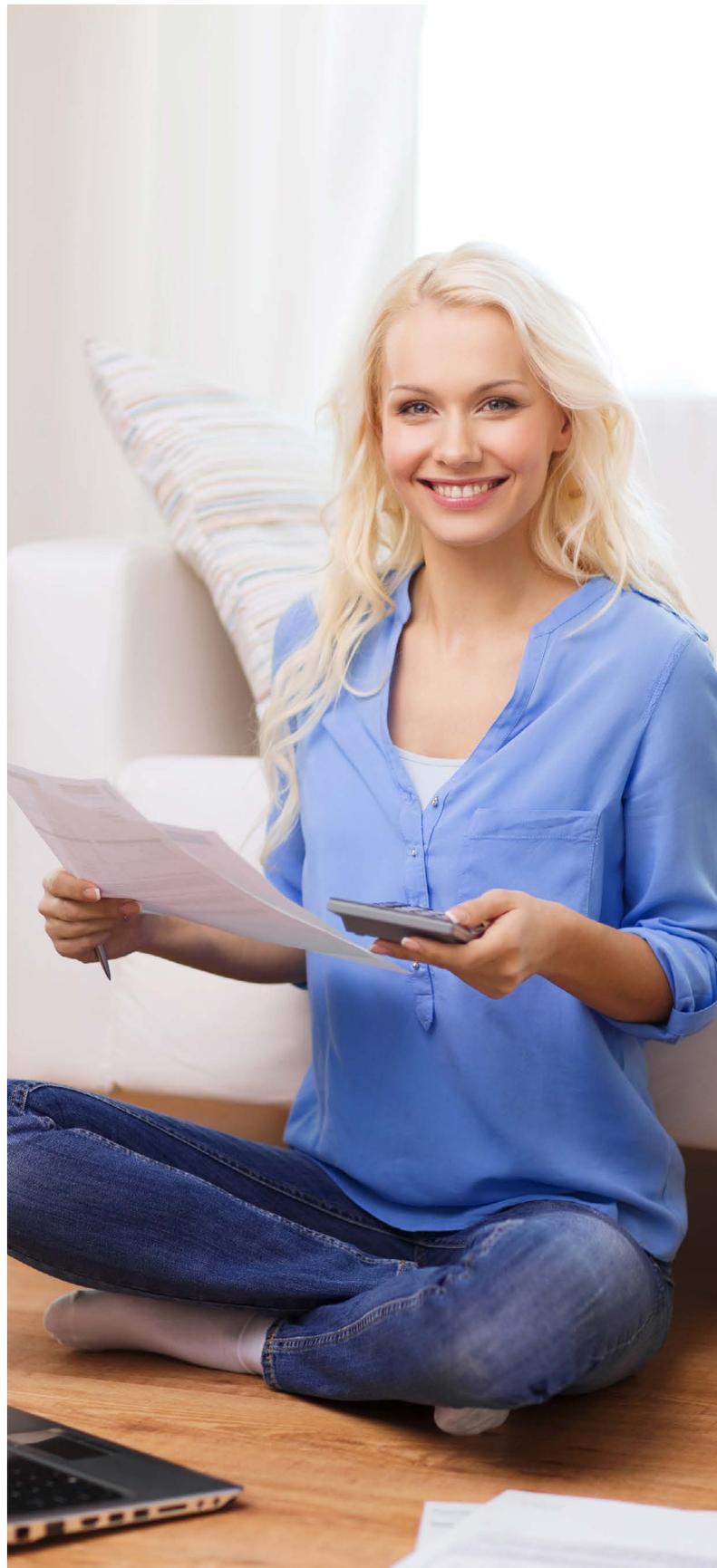
Tabs, Links, Buttons and Icons

This is how you open forms, get help, change your account information, save your information and submit (E-File) your return.

The screenshot shows the IRS Free File Fillable Forms interface. At the top, a blue navigation bar contains links for 'Free File Fillable Forms', 'Help', 'IRS Publications', 'Interactive Tax Law Assistant', 'Update Your Account', and 'Sign Out'. Below this is a row of buttons: 'File an Extension', 'Save', 'Print Return', 'Add/View Forms', 'Start Over', 'Check E-File Status', and 'FAQs'. The main content area is divided into two tabs: 'STEP 1. Fill Out Your Tax Forms' (active) and 'STEP 2. E-File Your Tax Forms'. The active tab displays Form 1040 for the year 2020. The form includes fields for 'Filing status' (with 'Married filing separately (MFS)' selected), 'Your first name and middle initial' (MARY), 'Last name' (PUBLIC), and 'Your social security number' (123-45-6789). At the bottom of the form are buttons for 'Instructions For This Form', 'Do the Math', 'Delete This Form', 'Print This Form', and 'Done With This Form'. A footer contains links for 'Terms of Service', 'Privacy Statement', and 'Manage Your Data'.

- STEP 1** — The active default page when you begin a tax return. The blue color indicates the tab is active. STEP 1 is where you select and complete all forms and schedules.
- STEP 2** — There are six (6) sections in STEP 2. Select this tab to begin the process of filing your return electronically (E-File). Review [STEP 2](#) in its entirety.
- File an Extension** — Opens Form 4868 and the E-File documentation for [filing the extension](#). Note- The program does not support this Form 2350, Extension for U. S. citizens and resident aliens living abroad.
- Help** — Opens a new browser and takes you to an IRS page that will assist with how forms are supposed to function. The [Line-by-Line instructions](#) page provides information on the most commonly used forms. The [Forms and Limitations](#) page provides information on supported forms and problems you may encounter when using the form.
- IRS Publications** — Opens a new browser and takes you to an IRS page where you can view and download forms, instructions and publications. You cannot attach and E-File forms and schedules downloaded from the IRS page.
- Interactive Tax Law Assistant** — Takes you to a tax law resource page, which walks you through a series of questions and provides you with responses to tax law questions.
- Update Your Account** — Takes you to a page where you can update the information you entered when you established your current account.
- Sign Out** — Saves all the information you have entered and logs you out of your account.
- Save** — Saves all the information you have entered. Note, if any of your saved information disappears, you probably have a browser compatibility issue. See the [Computer Requirements](#) page.
- Print Return** — Opens a new browser window and displays your tax return as a pdf file for printing. You may also use this function to save a copy of the return to your computer. Documents that do not print indicate the missing forms/schedules were not completed. Missing documents will not transmit to the IRS with the return. The documents (W-2, W-2G and 1099-R) are not supposed to print with the return; however, they will transmit with the return.

11. **Add/View Forms** — Allows you to add, view and delete forms and schedules. Selecting a form makes it the active form. Added forms are stored in “My Tax Forms.” Forms seen in “My Tax Forms” only indicates you have selected the form/schedule to add to your return. Forms seen here does not indicate their completeness. Only completed forms / schedules will transmit with your return. (See “Print Return,” above.).
12. **Start Over** — Permanently deletes the information you have entered on your current main form.
13. **Check E-File Status** — Opens a page where you can enter information about yourself and determine the status of your E-Filed return.
14. **FAQs** — Opens a new browser and takes you to Frequently Asked Questions about the program.
15. **Instructions for This Form** — Opens a pdf file in a new browser window, which contains the IRS form instructions for the form you are currently viewing.
16. **Do the Math** — Calculates fields on the form, when you have entered the information required to make the calculation. It also saves your work. We recommend you save your work often.
17. **Delete This Form** — Deletes the form currently viewed. You can add the same form later; however, you will have to re-enter all the information again.
18. **Print This Form** — Opens a new browser window and displays the form, currently viewed, as a pdf file. You can print and/or save the form to your computer from this window.
19. **Done With This Form** — Closes the form currently viewed and returns you to your main form. It also “Saves” your work. The button is not functional when viewing the main form. Select the STEP 2 tab if you have completed your return and want to begin the E-File process.



Add and Delete Forms

Note: You cannot add every supported form or schedule from the Add/View Forms Icon. Some forms and schedules can only be added from a “parent” form. For example: You may only add Form 4562 from its “Parent” Schedule C, E and F. Check the [Forms and Limitations](#) page to see all supported forms and the dates they become available. When you add a form, the form will appear in the My Tax Forms box. Having a form appear here does not mean the form will transmit your return to the IRS. It only means you have selected the form. For a form to transmit to the IRS, the form must be completed. To determine if a form will transmit, use the “Print Return” button. If the form prints with the return, it will transmit. Forms W-2, W-2G and 1099-R are not supposed to print with the return; however, the information you enter on these forms will transmit.

Add Forms

Two methods:

- Add/View Forms Icon** – Select the “Add/View Forms” icon to open the “My Tax Forms” list.
 - Select “Add a Form” from the bottom of the “My Tax Forms” box.
 - Scroll the list of forms then select the form you want
 - Some forms have “Taxpayer” and “Spouse” versions. Select the correct version.
 - You cannot add some forms/schedules with this method. See the above exceptions.
- Add Button** – Select the “Add” button for the form, if there is one for it on the line.
 - “Add” buttons are usually placed conveniently on the line that will accept the information from the added form.
 - Not all supported forms and schedules have an “add” button on the form you are viewing.



Deleting Forms

Two methods:

- Delete this Form Button** – If the form you want to delete is displayed, delete it by selecting the “Delete this Form” button, at the bottom of the page.
- Add/View Form Icon** – Select the “Add/View Forms” icon from the top of the page, which opens “My Tax Forms”
- Select “Delete a Form” to bring up the list of forms
 - Scroll the list and click on the form you want to delete
 - Select “Yes” from the pop-up box, asking if you are sure you want to delete the form.

If you need add the same form/schedule more than once, use any method previously described. When the pop up appears, select the “Add Another Copy” button.

Some forms, such as Forms 8889, are specific to the TAXPAYER or SPOUSE, not both. Selecting the wrong version will cause errors in the return.

STEP 2

Preparing to E-File

STEP 2 has six sections. Four of the sections (2, 3, 4 and 6) prepare your return for submission to the IRS and everyone must complete these sections. The remaining two sections are optional and depend on whether you have income documents (W2, W2-G or 1099-R) or have a balance you want to pay using Direct Debit.

Section 1: Add your W-2, 1099-R and/or W-2G information

W-2s, 1099-Rs and W2Gs are the only tax forms you need to add to your return. If you have any other types of 1099 forms (SSA-1099, 1099-G, 1099-MISC, etc.), they do not need to be added. Instead, you will need to add the amounts from them to the corresponding lines on Form 1040. You will also enter total federal withholding amounts from other forms in Section 2, Line B, below.

- Complete one electronic W-2 for every W-2 you received. Click the Add button for each Form W-2 you received

If you received more than one W-2, click the **Add** button to enter each form separately.

- Complete one electronic 1099-R for every 1099-R you received. Click the Add button for each Form 1099-R you received

If you received more than one 1099-R, click the **Add** button to enter each form separately.

- Complete one electronic W-2G for every W-2G you received. Click the Add button for each Form W-2G you received

If you received more than one W-2G, click the **Add** button to enter each form separately.



- **Section 1: Add Income Documents** — If not previously added from the Add/View menu, you can select your income documents (W-2, W-2G and 1099-R) here. Use the “Add” button for each type of income document. If you have more than one W-2, W-2G or 1099-R, select the “Add” button again, for each of the paper documents you received from the employers/payers. If you haven’t any W-2, W-2G or 1099-R forms to add, skip Section 1.
- Round cents to the nearest dollar. Total the rounded numbers for your income and withholding entries. Enter all other information exactly as it appears on your paper documents.
- **NOTE:** There are no “Add” buttons for any other 1099 forms, such as SSA-1099, 1099-RRB, 1099-MISC, etc. It is not necessary to “add” and transcribe these other 1099 documents. Enter the federal withholding from these other income documents in Step 2 Section 2, Box B.

Section 2: Add your withholding information

Make sure the amounts on Lines D and E match, and make sure to fill in all applicable lines.

Enter the appropriate FEDERAL WITHHOLDING in boxes A and B

The amounts in boxes D and E must match

A. Total the federal withholding amounts on all W-2s (Box 2), 1099-Rs (Box 4) and W-2Gs (Box 4) and enter the total on Line A.

B. Enter on Line B the total amount of other withholding that you are reporting on Form 1040, line 25d that is not reported on a form in Section 1 above. These amounts come from documents such as SSA-1099, 1099-DIV, 1099-MISC, 1099-B, other 1099s or Schedule K-1s.

C. Enter federal withholding from line 24 of Form 8959, Additional Medicare Tax.

D. Total federal withholding (Lines A through C).

E. Total federal withholding from Form 1040, Line 25d.

A

B

C

D

E

Federal Withholding: If you do not perform the reconciliation correctly your return may not transmit. If it does transmit, it will reject.

Section 2: Reconcile Your Federal Withholding

— You must reconcile the amount of federal withholding you claim on your main form with the federal withholding shown on all your income documents. For reconciliation to work, if you have income documents, you must add your income documents (W-2's, 1099-R's and W-2G's) into the program.

Remember, this is about **FEDERAL WITHHOLDING** only!

- Enter the total of your rounded federal withholding from your W-2, W2-G, box 4 and 1099-R into Box A of STEP 2, Section 2.
- Look at all your other income documents that show federal withholding, total the rounded federal withholding from those documents and enter that figure in Box B of STEP 2, Section 2.
- If you completed Form 8959 and there was a federal withholding amount on line 24, that number will transfer to Box C.
- Box D calculates when you select "Do the Math"
- Box E reflects the amount of federal withholding you entered on line 25d of Form 1040.

The amounts in Boxes D and E must match to proceed. If they do not match, you have made a mistake in the amount of federal withholding you entered on your main form or the amounts you entered in Boxes A and B are wrong. Perform the reconciliation again.



Section 3: Verify your identity

You must enter **A** last year's Adjusted Gross Income (AGI), or **B** last year's five-digit self-selected signature PIN.

If you are filing a joint return, both taxpayers must follow this process.

A. Look at last year's federal tax return and enter your AGI in the space provided below. Look for your AGI on line 8b of the Form 1040

- If you are filing Married Jointly this year with the same spouse you filed with last year, "Taxpayer" and "Spouse" will have the same AGI.
- If you did not file a return last year, enter a zero in the "Taxpayer" AGI space.
- If your spouse did not file a return last year, enter zero in the "Spouse" AGI space.
- If you do not have or cannot remember last year's AGI, use the IRS [Get Transcript Link](#)

Last year's AGI:

OR

B. Enter last year's self-selected signature PIN. If you do not have or do not remember your PIN, skip this step and follow the instructions in step A above.

Last year's five-digit self-selected signature PIN:

Section 3: Verify Your Identity — The IRS needs to authenticate that you are the taxpayers whose Social Security Numbers appear as the Primary and Secondary (if married filing jointly) on this return.

Enter last year's AGI in the space provided. If you are filing jointly and you filed jointly with the same spouse last year, the AGI for the Taxpayer and Spouse will be the same. If last year's return was not filed jointly with your current spouse, the AGI must be taken from the separate returns.

If you did not file a return last year, enter "0" for your AGI.

If you do not know what last year's AGI is, [get help retrieving it](#). Alternatively, if you can remember the 5-digit signature PIN you used last year to sign your return, you can enter it in the space provided. If you cannot provide last year's AGI or Signature PIN, you must mail in your return to the IRS. See the IRS form instructions for a mailing address.

Don't Guess last year's AGI

Go to [irs.gov](https://www.irs.gov) and search "Get Transcripts" if you need a copy of last year's tax return,



Section 4: Add your electronic signature
To sign your return electronically, add today's date and cell phone number here. If you are filing jointly with your spouse, you will each need to add your own PIN and date of birth.

A. Today's Date (mm/dd/yyyy)	<input type="text" value="02/05/2021"/>	
B. Cell phone number	<input type="text"/>	
C. You can choose any 5 numbers for your PIN. (Do not use 00000 or 12345)	<input type="text"/>	<input type="text"/>
D. Date of birth (mm/dd/yyyy)	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>
E. Driver's license or State issued ID number	<input type="text"/>	<input type="text"/>
F. Driver's license or State issued ID State	<input type="text" value="v"/>	<input type="text" value="v"/>
G. Driver's license or State issued ID issue date	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>
H. Driver's license or State issued ID expiration date	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>

The Primary Taxpayer must complete all of the areas indicated

If married and filing jointly, the SPOUSE must also complete the areas indicated

For increased FRAUD PROTECTION complete the state Drivers License ID sections, if you have those documents

Section 4: Signing the Return — You need to provide the following information and, if filing jointly, the Spouse needs to provide information also.

- a) Enter your email address, twice
- b) Enter the date you are transmitting your return (Today's Date)
- c) Enter an optional cell phone number
- d) Make up a five-digit Signature PIN and enter it into the designated field. It can be any five numbers except 00000 or 12345.
- e) Enter your Date of Birth. The date format is MM/DD/YYYY. If you are the Primary taxpayer on the return, are under age 16 and have never filed a federal return before, you must mail in your return or use a professional tax preparer who is an Authorized IRS E-File provider.

To increase your protection against fraud, complete the fields for driver's license or state issued ID, if you have those documents.

If you are receiving a refund or if you are not paying your balance, in full, with Direct Debit, scroll past Section 5 "Payment to the IRS".

Remember to print and check your return for errors before transmitting your return to the IRS. Once the return is transmitted and accepted by the IRS, you cannot resubmit the return. See [Amended Returns](#).



Section 5: How to pay your taxes due

If you are getting a refund, you can skip this section.

Here are four options for payment. You may have the money electronically withdrawn from your bank account, pay by check or use IRS Direct Pay, or if you cannot pay consider an online payment agreement with the IRS.

A. Pay by electronic withdrawal

The IRS can accept your payment by direct debit from your bank account. This does not apply to estimated payments. Enter the required information below and agree to the disclosure Statement.

Routing number **1**

Account number **2**

Type: Checking **3**

Savings **4**

Date to make withdrawal

Note: If you are getting a refund, leave information above blank.

Daytime phone number **5**



1 ROUTING NUMBER **2** ACCOUNT NUMBER

Electronic withdrawal disclosure Statement

I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH Electronic Funds Withdrawal (Direct Debit) entry to the financial institution account indicated for payment of my federal taxes owed on this return and the financial institution to debit the entry to this account.

I further understand that this authorization may apply to subsequent federal tax payments that I direct to be debited through the Electronic Federal Payment System (EFTPS).

In order for me to initiate subsequent payments, I request that the IRS send me a personal identification number (PIN) to access EFTPS.

This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization.

To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date.

I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment.

I agree to pay by electronic withdrawal **6**

Section 5: Paying a Balance Owed — If you have a refund **DO NOT** enter any information in this section.

Owe a balance on your return? You can pay by

A. Direct Debit (Electronic Funds Withdrawal)

B. Check

Check – Print Form 1040V (Payment Voucher) and make sure the payment is postmarked by the due date of the return. Payment addresses are in the 1040 instruction book.

C. Direct Pay

Direct Pay – Make a full or partial payment on the balance of your return and/or make estimated tax payments using IRS [Direct Pay](#).

Can't Pay? – Consider the [Online Payment Agreement](#) option. You can also explore other payment options from the [IRS Payment](#) webpage.

REFUND TAXPAYERS who enter any information in STEP 2, Section 5 will not be able to transmit their return.

Direct Debit (Electronic Funds Withdrawal) – This method is the most convenient payment method and linked to your accepted return. To make a full payment with direct debit, carefully enter:

1. Enter your Routing Number

2. Enter your Account Number

3. Select either the Checking or Savings Radio Button

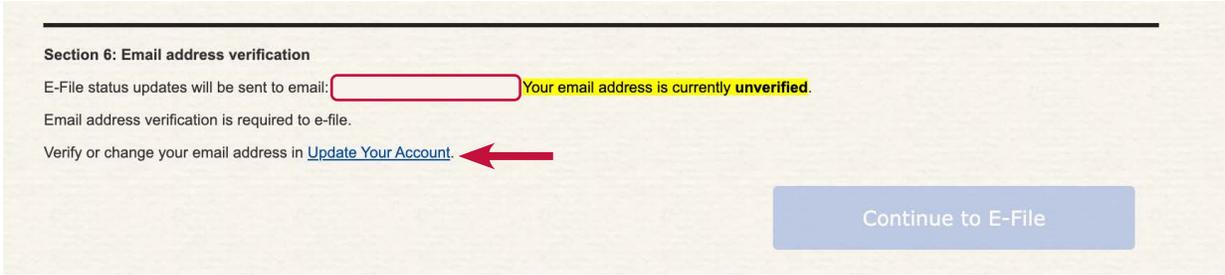
4. Enter the withdrawal date (format MM/DD/YYYY)

5. Enter a ten-digit daytime phone number. **NOTE:** If you have a foreign phone number, See the section on [International, Foreign and Military filers](#)

6. Check the "I Agree" box

7. Print and check your return before continuing to Section 6

Caution: When efilting and using Direct Debit to pay a balance owed, payment is withdrawn from your account only if your return is accepted.



Section 6: Email Address Verification — Your email address must be verified before the blue “Continue to E-File” button is enabled.

1. The address you entered during account creation is shown in the area indicated by the red box. Carefully inspect it, to ensure it is correct. Your address will be shown as “verified” or “unverified”.
2. If verified but the address is incorrect, follow the instructions below before clicking the blue “Continue to E-File” button.
3. If your address is unverified or you need to correct it:
 - a. Click on “Update Account”.
 - b. In the next screen, click on “Verify email” or “Edit” if the address is not correct. There are several steps to take if you edit the address. Once successfully edited, you’ll return to the screen where you will click on “Verify email”.
 - c. Click “Send verification email” on the next screen and you will receive an email with the link, “Confirm my account’s email address”. Click the link to complete your email address verification.



Review Your Return

Prior to selecting the “E-File Now” button, print and review your return for completeness and accuracy. Once you transmit the return and the IRS accepts it, the only way to correct mistakes is file an amended return, [Form 1040X](#).

Print a paper copy of your return. Make sure all the forms and schedules you added are included in the print.

Review all lines for information that should appear before transmitting to the IRS.

Print the Return –

- Select the “Print Return” icon at the top.
- Check your printed return against the list of forms in “My Tax Forms”
 - Missing forms are not complete
 - Some forms are not supposed to print, such as Form 1040ES, W-2, W-2G and 1099-R

Reviewing Incomplete Forms –

- Select the Add/View icon and select the form missing from your printed return
- Review the form and its instructions for obvious omissions that pertain to your tax situation
- Review the [Line-by-Line instructions](#) for the form for help on how the lines on a form are supposed to function and idiosyncrasies of the form
- Make your correction(s)
- Select “Do the Math” and proceed with STEP 2



Continue to E-File Button

The button is at the bottom of STEP 2, Section 6. Select the “Continue to E-File button after you have completed all of your forms in STEP 1 and all of the required elements of STEP 2.

After selecting the button, you will receive a message that the E-Filing Information is Incomplete or a message to complete the CAPTCHA and continue to E-File.

If you receive the incomplete message, you must resolve the problem before you are able to transmit the return. See [Transmission Problems](#). If no transmission problems are detected, complete the CAPTCHA and submit.

Once you submit, the “Ready to E-File” screen appears. Check the “I Agree” checkbox and select the “Transmit my Return” button.

After transmission, you will receive a final screen stating your return has been transmitted and to look for an email notification about Acceptance or Rejection of your return.

Note: DO NOT CONFUSE the “Transmission Successful” screen or the “Transmission Successful” email with the email stating your return has been accepted or rejected.

Ready to E-File

When you select 'Transmit my Return', your tax return will be transmitted to the IRS.

Disclosure statement

Under penalties of perjury, I declare that I have examined this return (or request for refund) including any accompanying statements and schedules and, to the best of my knowledge and belief, it is true, correct, and complete.

I consent to allow my Intermediate Service Provider, transmitter, or Electronic Return Originator (ERO) to send my return (or request for refund) to the IRS and to receive the following information from the IRS: a) an acknowledgement of receipt or reason for rejection of transmission; b) an indication of any refund offset; c) the reason for any delay in processing the return or refund; and d) the date of any refund.

I am signing this tax return by entering my self-selected signature PIN and associated electronic signature data in STEP 2.

I agree

[Back to Forms](#) [Transmit my Return](#)

Complete Captcha to Finish and E-File

For security purposes, enter the code shown below, then click the Submit button to continue to e-file:



[Try another code](#)

[Switch to audio verification](#)

[Back to Forms](#) [Submit](#)

E-Filing Information is Incomplete

Required information is missing in your return.

Please verify that your name, social security number, filing status, and complete address are entered in your main form, and all sections in Step 2 have the required information.

Click on the E-File Instructions button at the bottom of previous page for more information.

[Back to STEP 2](#)

Transmission Successful

You have e-filed your taxes.

Your forms have been successfully transmitted to the IRS.
Please watch your email for two messages from Free File Fillable Forms.

1. Shortly you will receive a confirmation of your successful e-file transmission.
2. In 24-48 hours, a message when your tax return is accepted or rejected by the IRS.

These messages will come from customer_service@freefilefillableforms.com.

[Logout](#)

Print Your Return for Your Records

After your return has transmitted and you have received notification that the IRS has accepted your return, print a copy of your accepted return for your records, if you have not already done so.

IMPORTANT – The Free File Fillable Forms program shuts down every year, on or shortly after October 20. See [“Before Getting Started.”](#) After that date, the developer erases all information from the server, and you will not have access to your account or return information.

In addition to saving a paper copy, you may also save a “soft copy” of your return on your hard drive or portable storage device. To save a soft copy, use the “Print Return” icon. When the new browser opens with your tax return in pdf format, use your browser’s “File > Save as” function to save your soft copy.

Help with Free File Fillable Forms

Free File Fillable Forms relies on taxpayers using web-based self-assist resources to get [Help](#) with the program.

Filing an Extension (Form 4868)

Form 4868 – After creating an account, select the “File an Extension” button. Enter your name, address and Social Security Number, and complete the rest of Form 4868. Transmit the extension by completing the E-File section below Form 4868. If you have a balance you want to pay, you may pay using Direct Debit (Section 3 B, below Form 4868).

CAUTION! If you complete Section 3 B but fail to enter your payment amount on line 7 of Form 4868, your payment will not be made, even if your extension is accepted.

Form 2350 – Not Supported

Rejected Returns

The Internal Revenue Service will either accept or reject the return after you transmit (submit) it. You will receive an email from customer_service@freefilefillableforms.com when the IRS rejects your return. This email will list the reason(s) for rejection (error) and provide a link you should use to resolve the rejection issue.

A reason for rejection (error) has two parts:

1. The Business Rule Number and explanation
2. The Xpath

It is important to follow the [instructions](#) when searching for a solution to the error(s).

- Copy and paste your rejection email into the search box
- If you searched multiple errors and you don’t get the expected results, search one error at a time and include both parts of the error

Functional Issues

(All Issues except Rejections)

If we discover a software issue that prevents you from completing or submitting (transmitting) your return, we will place the issue in the table on the [Help](#) page. The table will describe the problem and provide a “Tentative Fix” date. Other assistance on the Help page includes:

1. The [Line-by-Line Instructions](#) page provides information on how the most commonly used forms work. Many times, taxpayers believe they have encountered a software “bug” or “glitch” because they are not familiar with program idiosyncrasies. This page is your best resource for determining how something is supposed to work or why it is not working the way you believe it should.

2. Free File Fillable Forms supports most, but not all forms and schedules. Some of the supported forms and schedules have limits, which may prevent you from completing or transmitting your return. The [Forms and Limitations](#) page will let you know:

- a. The supported forms and schedules
- b. When the forms and schedules will become available
- c. Limitations that may prevent you from successfully completing the return

3. Our [Account Issues](#) page provides basic information on the most common problems taxpayers have with creating or accessing their Free File Fillable Forms account. Many times, the issue is caused when attempting to create or access an account using an unsupported browser or operating system. Using non-recommended operating systems and/or browsers will expose you to the risk of technical problems you may not be able to resolve later. Always comply with the recommendations on our [Computer Requirements](#) page.

a. Error 500 Code - This is a website server error. The error is generally temporary (15 minutes or less). Once the host notices and corrects the error, you can access your account and continue working on your return. If you continue to receive the error, repeat the event that caused the error to occur and [reply](#) with the following:

- The error message, including the ID number
- The date and time the error occurred (please note your time zone)
- The user ID and email address you are using for the account
- Your computer operating system
- The browser and browser version you are using

- b. Error 503 Code - When you experience Free File Fillable Forms account access issues and/or have difficulty creating your account and experience a “Code 503” error message, please read the following list of items to check, review, and/or correct to proceed:
- Close all other programs and browsers other than the browser you are using to access your account.
 - Clear your browser’s history before your next attempt to access or create your account.
 - Create/use a one-word User ID of at least 4 characters (i.e., my.emailaddress@ustaxes.com). Do not use diacritics, accent marks, language-specific punctuation and quotation marks. A valid email address is acceptable.
 - Create/use a one-word, 8-character password with at least one number and one special character (i.e., #, \$, *, !). Do not use diacritics, accent marks, language-specific punctuation and quotation marks.
 - Double check the accuracy of the security question selected & the accuracy/spelling of the answer you provide.
 - Ensure that ALL required CREATE ACCOUNT fields have been filled-in before pressing the CONTINUE button.
 - When prompted, be sure to print the account login information, record your User ID, password and security question answer exactly as entered for your records.
- c. Changing Account Information - Click the ‘Update Account’ link on the upper right navigation bar.
- d. Deleting Your Data - If you have not successfully E-Filed your return, you can delete your data by selecting the Start Over option and then sign out of the return. This will erase any tax return information you entered.
- e. Not receiving expected email - If you did not receive a confirmation email when you created an account, it is possible your spam filter is blocking the email. Check your spam (or junk) folder and look for an email from customer_service@freefilefillableforms.com
- f. Not receiving an acknowledgement email - The email should arrive within 2 hours after you successfully transmit your return. It takes longer the closer you get to April 15. If you do not receive this email within 24 hours, do the following:
- Make sure you are checking the same email account shown in Step 2, Section 6 (Email Address Verification).
 - Check your spam filter or junk mail folder for email from customer_service@freefilefillableforms.com
 - If you still have not received an email you can check your return status by selecting the “Check E-File Status” button, located at the top of the screen, when you are in your Free File Fillable Forms tax return. Enter your Social Security Number and zip code on the E-Filed return. If the program shows no status, you have not successfully transmitted your return. Wait at least 24 hours after transmitting your return before using “Check E-File Status”, otherwise, you may receive conflicting information.

4. Transmission problems may occur after you select the “Continue to E-File” button, preventing the submission of your return to the IRS. Errors are difficult to diagnose because the software is not currently able to pinpoint where the error has occurred, and the error can occur anywhere in the STEP 2 process or in the name and address section of your return. Transmission errors may also occur because you are using an incompatible browser, or it could be as simple as you’re your internet connection stopped working. Review the [Transmission Problem](#) page for a list of things to check.



5. Printing, Display and Miscellaneous Forms issues

a) When you experience Display Issues, you need to review and comply with the recommended [Computer Requirements](#). A Print Issue could be a computer requirement issue, an incomplete form or simply a form that is not supposed to print. (See [Review Your Return](#)) The [Print and Display Issues](#) page lists some of these issues and their likely causes.

b) Entered Information Disappears- If you are using a recommended browser and are using the browser’s autofill or add-on, such as Incognito or In Private, turn them off and then perform these steps:

- Access the form and line causing the problem
- Highlight the entry field causing the problem, hit your “Delete” key, then, with your cursor still in the field, hold down the “Backspace” key for five seconds.
- Save and exit the program
- Close all browser sessions except one and clear you cache and cookies
- Access your account and complete the form
- Delete the form if this does not resolve the problem

c) Negative numbers (or losses) - We apologize for the lack of consistency regarding the paper instructions and entering negative numbers in Free File Fillable Forms. Generally, you must precede a negative number with the minus sign (-). There are some instances where you may calculate a negative number, but the lowest acceptable figure for the line is a zero. Always review the form instructions regarding the entry of a zero or negative number

d) Worksheets are not part of the functional program. Print, fill them in and enter your results on the form asking for the worksheet calculation

e) Free File Fillable Forms supports the Identity Protection PIN (IP PIN) for the Taxpayer, Spouse and Dependents. If the IRS sent Notice CP01A, enter the six-digit PIN in the appropriate field(s). • Taxpayer and Spouse- Enter the IP PIN to the right of the “Occupation” (lower right corner of Form 1040). Make sure you enter the IP PIN into the correct field for the “Taxpayer” or “Spouse”, otherwise, your return will reject.

- The Dependent IP PIN is supported on Form 1040, Form 2441 and Schedule EIC by selecting the “Add Dependent(s) IP PIN” button on these forms.

g) Information Transfers, from form to form, have a hierarchy relationship. (Example: Form 1040 is the “parent” form to Schedule D and Schedule D is the “parent” to Form 8949) Amounts from your “parent” form may not transfer to subordinate forms unless you complete the parent form to the point where you should add the subordinate form. The completed information on the parent form would include all the personal information on your Form 1040 (Name, Address, SSN, Filing Status and Dependents)

h) Writing in additional information – The IRS form instructions may tell you to write certain information somewhere on a line. Use the small grey fields, on the line, for this. See [Additional Information Areas](#).

i) Calculations

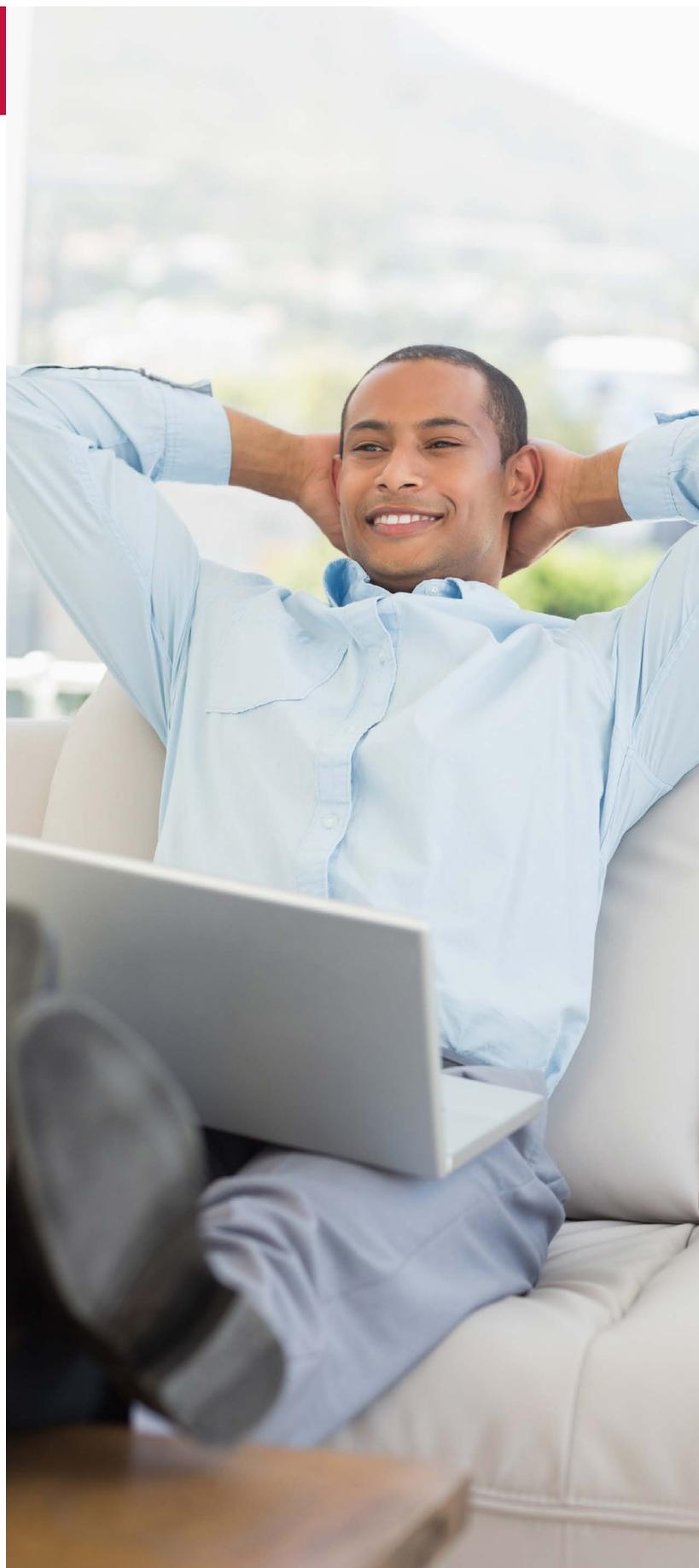
- Calculated Fields – Some lines calculate for you. If you can manually enter a number on a line, do not expect it to calculate for you. To get a number to calculate on the line, you must first complete the lines, which should be included in the calculation and then select “Do the Math.” If a line is calculated, you cannot override the calculation
- Incorrect Calculation - Calculations derive from information entered on other lines, so make sure that information is correct. Once you have verified the miscalculation is not a function of your entries, contact us about the issue.

6. International / Military / Foreign Filers –Review our [International Filer’s page](#) for assistance with particular forms and entering addresses. When creating an account, you should have a 10-digit U.S phone number. **If you do not have a U.S phone number you should not use this program** because you may not be able to recover the account, when the application challenges your identity. As a work-around, you can contact a friend or relative with a U.S. phone number and ask them if you can use their phone number for account creation and recovery. When you use a phone number that is not your own number, make sure to check the “Verify with text message” checkbox, which will allow you to test the use of that phone number and verify the account.

Accepted Returns

Once the IRS has accepted your return, you cannot interrupt acceptance processing. Processing usually takes 21 days or less. Any issue that arises after you receive an email that the IRS has accepted your return is an issue between you and the Internal Revenue Service.

- **Incorrect Bank Routing Number or Account Number** – You should contact your bank if you entered the correct routing number and the account number is incorrect to determine if the incorrect account number belongs to someone else. If the IRS determines it cannot direct deposit the refund, you will receive a paper check. Call 1800-829-1040 for more assistance.
- **Balance Owed Returns** – Review your bank transactions to ensure payment was processed. It is the policy of the Internal Revenue Service to process payments as soon as possible. If your payment was not made, check with your financial institution and call IRS customer service at 1800-829-1040.
- **Refund Returns** –
 - o Check [Where's My Refund?](#)
 - o If you entered the wrong banking information, check with your financial institution and call IRS customer service at 1800-829-1040
- **Amended Returns (Form 1040X)** – If you have discovered a mistake on your return, review [Filing an Amended Return](#).



Other Issues and Assistance

We suggest you start your search for assistance on the [Tax Information for Individuals](#) page.

Do you think you are a victim of [ID Theft](#)?

Tax Law Help - If you need help understanding what information you should enter on a line, refer to the IRS instructions for the relevant form or schedule. There is a link for these instructions at the bottom of each Free File Fillable Forms screen. [Publication 17](#) is also a useful resource for information. The help available for this program, Free File Fillable Forms, does not include interpreting the tax code or other tax assistance.

For more assistance with answering Tax Law Questions, consider these resources:

- Use the [Interactive Tax Assistant](#)
- Visit an IRS local [Taxpayer Assistance Center](#)
- Use [Tax Topics](#) to investigate specific tax issues
- IRS Services for Individuals – [Publication 5136-A](#)
- Access the IRS website and enter your **KEYWORD** to search for your tax topic
- If you still need tax law help, contact the IRS, toll-free at 800-829-1040
- If you have a hearing impairment, contact the IRS, toll-free at 800-829-4059 (TDD)
- If you live outside the United States, visit the [International Taxpayers](#) page on IRS.gov



