

IRS Direct File pilot | What you need to know

About the IRS Direct File pilot

The IRS Direct File pilot is a new free service that offers you an easy to use and secure way to electronically file your 2023 federal tax return directly with the IRS. The pilot is limited to eligible taxpayers reporting only certain types of income and claiming limited credits and deductions.

Visit directfile.irs.gov to learn if you're eligible and if it's right for you.

The pilot is available in 12 participating states:

Arizona	Nevada	Tennessee
California	New Hampshire	Texas
Florida	New York	Washington
Massachusetts	South Dakota	Wyoming

If you live in Arizona, California, Massachusetts or New York and need to file a state tax return, Direct File pilot will connect you with your state's online filing tool to prepare and file your state tax return. Washington residents can apply for their state's Working Families Tax Credit.

Is the Direct File pilot right for me?

Yes

- You're a U.S. citizen or **resident alien** living in Arizona, California, Florida, Massachusetts, Nevada, New Hampshire, New York, South Dakota, Tennessee, Texas, Washington and Wyoming.

AND

You have one or more of these types of income:

- W-2 income
- SSA-1099 Social Security benefits
- 1099-G unemployment compensation
- 1099-INT interest income \$1,500 or less

You want to take any of these deductions:

- Standard deduction
- Educator expense deduction
- Student loan interest deduction

You want to take these tax credits:

- Earned Income Tax Credit
- Child Tax Credit
- Credit for Other Dependents

No

- You're a **non-resident alien** or dual status
- You're not a resident of one of the 12 participating states
- You're a **noncustodial parent who claims qualifying children through Form 8332**

You have one or more of these types of income:

- 1099-INT interest income above \$1,500
- 1099-K
- 1099-NEC
- 1099-R Retirement income
- Business income
- Capital gains
- Dividends
- Gig economy
- Pensions and annuities

You want to take these deductions and credits

- Itemized deductions
- Child and Dependent Care Credit
- Premium Tax Credit (1095A, Marketplace)
- Saver's Credit

IRS Direct File pilot frequently asked questions

Is the Direct File pilot prefilled with my tax information?

No, while you'll manually enter your tax information, we'll walk you through filing your taxes step by step.

How can I get help when participating in the pilot?

If you need help, you can easily live chat with one of our customer service representatives who can help you with technical support and basic tax law clarification in both English and Spanish. Customer service representatives will not have access to your IRS account data. Questions that fall outside of the scope for Direct File pilot will be handled by other IRS support services.

Can I change to a different filing method after I've begun the process to use the Direct File pilot?

Yes, participation in the Direct File pilot is voluntary. You'll have the opportunity to use Direct File pilot and make sure it's a good option for you. If you start using the pilot and then decide it's not a good option, you can choose a different filing method. Visit [IRS.gov/filing](https://www.irs.gov/filing) for filing options and information.

When will the Direct File pilot open?

We're rolling the pilot out in phases and increasing the number of eligible taxpayers who can access it with each phase. The pilot will be more widely available in mid-March. There's a status banner on directfile.irs.gov that tells you if access is currently limited or open to new eligible taxpayers.

What happens after I submit my return through the Direct File pilot?

We'll notify you that your federal tax return is accepted or rejected. If you are getting a refund, you can visit [IRS.gov/refunds](https://www.irs.gov/refunds) to check your refund status 24 hours after the IRS accepts your return. If you owe a tax balance, you can make a payment online. Learn about IRS payment options at [IRS.gov/payments](https://www.irs.gov/payments).

If your return is rejected, we'll explain how to correct the error, along with options to request additional assistance from customer service. If the issue cannot be corrected, you can seek assistance from a tax professional, IRS volunteer site, or explore another filing option.

What does the IRS expect to learn during the Direct File pilot?

We're using the Direct File pilot to learn what works well and how we can improve the tax filing experience.

Where can I learn more about the Direct File pilot?

For more information and to get the latest pilot updates, visit directfile.irs.gov or subscribe to Direct File pilot news at [IRS.gov/subscribe](https://www.irs.gov/subscribe).