

## MyFreeTaxes.org Self-Filing Guide

The purpose of this guide is to walk you through the process of filing your taxes for the 2023 tax filing year from beginning to end with free tax filing software provided by MyFreeTaxes.org.

Self-filing is a good option for tax filers who are filing a current year tax return, are comfortable using online tax software and want to learn how to file on their own.

*Please note, that we have video tutorials of this guide available [here](#) in English (also available [here](#) in ASL) that were created for tax filing year 2021 and should be used as reference only for the 2023 tax filing year and future tax filing years.*

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## MyFreeTaxes.org Self-Filing Guide

### Step 1: Go to MyFreeTaxes.org

Go to [MyFreeTaxes.org](https://MyFreeTaxes.org).

Click **"File on my own"**.

Scroll down and enter your contact information

Click **"GET STARTED FILING"**.

You should be automatically directed to the next page—if not, you will need to click the orange bar that says **"If the window doesn't open, click here"**.

## MyFreeTaxes.org Self-Filing Guide

Indicate if you earned less than \$79,000 or more, type in your zip code, and indicate if you had income from self-employment.

- **Please note**, that if you made above \$79,000, you still qualify to self-file for free. You will just be redirected to use CashApp instead of TaxSlayer to file. And, any self-employment income can also be reported using TaxSlayer or CashApp.

Click **"FILE NOW"**.

In 15 seconds, our MyFreeTaxes.org page will automatically redirect you to the TaxSlayer VITA/TCE self-prep kiosk page.

If you would like to be redirected more quickly, click **"FILE NOW"**.

Click the **"CONTINUE"** button to create a TaxSlayer Account.

Go on to Step 2.

### Welcome to the TaxSlayer VITA/TCE self-prep kiosk

- No current year preparation or electronic filing Fees
- Unlimited current year states
- Access to prepare and e-file 1040-NR
- Access to prepare and e-file 1040PR

For assistance while completing your return, please contact the free tax assistance program where you received the referral link to this software. They have IRS-certified specialists available to assist you.

Click the Continue button to create a new account or login with an existing account.

## MyFreeTaxes.org Self-Filing Guide

### Step 2: Create An Account With TaxSlayer - the free IRS self-filing website

If this is your first time creating a TaxSlayer account for 2024, at the top of the page, click **"Create account"**. If you already have an account, just enter your username and password.

**Please note:**

- Remember to bookmark this page on your web browser to log back in at any time.
- You can also copy and paste the link and save it in your notes, email, etc.
- If you forgot your username, press the button that says **"Forgot Username"** If you forgot your password, press the button that says **"Forgot password"**.
- If you run into any issues with the link, contact the main helpline at: 866-698-9435.



### Log In

Need a TaxSlayer account? [Create account.](#)



Username

Password

[Forgot Username](#) | [Forgot Password](#)

LOG IN

By clicking 'Log In', you agree to TaxSlayer's [License Agreement](#), [Privacy Policy](#), and [Terms of Service](#).

Complete the information necessary to create an account.

If you would like to *verify your account via text message*, make sure the box that says **"Verify my account via text message"** is checked. If you would like to *verify via email*, **uncheck the box**.

**Please note:**

- Save your username and password in a secure place with your tax documents
- You can log in and out of your tax account as you work on your return. You do not need to enter all the information at one time.

Click **"Create Account"**.



### Create your account.

Already have an account? [Log In](#)

Email address

Username

Password

Mobile phone

(213) 000-0000



☒ Verify my account with text message. Standard call, messaging, or data rates may apply.

CREATE ACCOUNT

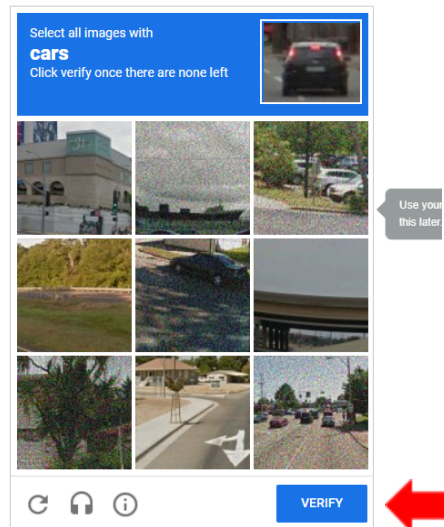
By clicking 'Create Account', you agree to TaxSlayer's [License Agreement](#), [Privacy Policy](#), and [Terms of Service](#).



## MyFreeTaxes.org Self-Filing Guide

In this next step, you will have to confirm that you are really a person and not a bot.

1. Complete the CAPTCHA (This is a question-answer type security system to verify that you are a person).
2. To complete the CAPTCHA, you must choose all the photos that match the indicated word.
3. Press the button that says **"VERIFY"**.



If you chose to receive your code **by text message**:

1. Click on **"SEND CODE"**.
2. Enter the security code sent to your phone number.
3. Click **"Verify"**.

If you chose to receive your code **by email**:

1. Complete the CAPTCHA (This is a question-answer type security system to verify that you are a person).
2. To complete the CAPTCHA, you must choose all the photos that match the indicated word.
3. Press the button that says **"VERIFY"**.

**Please note**, regardless of the method you use to verify your account, if you entered an email when creating your account, you will receive an email in your inbox to verify your email. You do not have to do this right away.



### Check your phone

Enter the verification code we sent you to verify.

We sent a code to:  
(\*\*\*)(\*\*\*-\*\*\*10

Enter the 6-digit code

[Resend Verification Code](#)

[Skip](#)

VERIFY

## MyFreeTaxes.org Self-Filing Guide

Click **"CONTINUE"** to begin your 2023 tax return.



**Success! Your TaxSlayer  
account has been created.**

Now, let's keep going.

**CONTINUE**



### Step 3: Begin self-filing your 2023 tax return with TaxSlayer.

Type your full name into the box.

If you are married and filing jointly, check the box that says **"I am filing a joint return with my spouse"**. If you are *NOT married* – leave that checkbox blank.

Click **"CONTINUE"**.

2023 | AMERICAN PLEDGE Help & Support

### Personalize your TaxSlayer experience.

Before you get started, please review the following disclosure. Section 301-7216 of the Internal Revenue Code specifically governs the use and disclosure of tax return information. Some states may also have additional laws and regulations related to use and disclosure of the same information. We use your tax return information only in accordance with those applicable laws and regulations to prepare and assist in preparing your tax return, to provide services associated with preparing your tax return, and to provide you with other products and services you specifically request or consent to.

Please review the information below and sign to agree to the terms and conditions.

#### Use of Information

As permitted by law, we may use the information you provide to address questions submitted to our customer or technical support systems; to send updates or security alerts; to provide notification of related tax return preparation products or services, or product enhancements; to monitor and investigate fraud, identity theft, and other illegal activity; and to personalize and improve our services.

Note that if you are not eligible for the Free File product, you may switch to a commercial product which may

**PRINT**

Ensure the details below are accurate:

Full Name \*  
Jane Doe

Date\*  
02/01/2024

☐ I am filing a joint return with my spouse.

**CONTINUE**

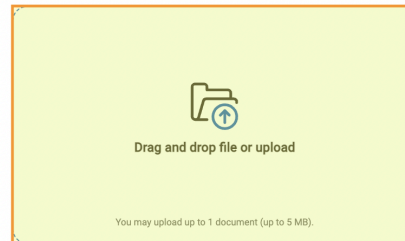
## MyFreeTaxes.org Self-Filing Guide

If you have last year's tax return, you can upload it and click **"VIEW RESULTS"**.

If not, click **"Skip"**.

### Upload last year's tax return (Form 1040)

If you have a copy of your 2022 return, you can easily upload it here.



#### Upload Tips:

1. Make sure your file is saved as a PDF.
2. Only upload your prior year tax return here. We will ask for other forms later.
3. Make sure your PDF is not password-protected.



Skip

UPLOAD

Type in your personal information

#### Please note:

- Double check spelling and numbers
- Enter your personal information as it is written on your Social Security Card or Individual Taxpayer Identification Number

Click **"CONTINUE"**.

### Personal Information

#### Taxpayer's Information

Primary taxpayer first name  MI

Last name  Suffix (Jr, Sr, etc.)

SSN The IRS requires your Social Security Number for e-filing \*

-  -

Date of Birth  /  /

Occupation



BACK

Skip

CONTINUE

## MyFreeTaxes.org Self-Filing Guide

Enter your mailing address and residency status.

**Please note:**

- If you do not have a mailing address—ask a shelter, clinic, or youth center to use their address and use that information.
- For residency status, select “Full-Year of the State” if you lived in California the whole year. If you moved to California in 2024 and lived in a different state in 2023 select “Full-Year Resident of Another State”. If you lived in multiple states, select “Part-Year State Resident”.

Click “**CONTINUE**”.

### Personal Information

What's your mailing address?

Country  
United States of America

Address (street number & name)

Apartment (provide apartment number only)

ZIP code

City, town, or post office

State  
- Please Select -

Residency Status  
- Please Select -

☐ I have a stateside military address.

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Skip

CONTINUE

### Residency Status \*

- Please Select -

- Please Select -

Full-Year Resident of This State

Full-Year Resident of Another State

Part-Year State Resident

Click on any checkbox that applies to you, or leave them blank.

**Please note:**

- You can click on the question mark icons next to each checkbox to learn more information.

Click “**CONTINUE**”.

### Jane Information

Check all that apply:

- ☐ Jane can be claimed as a dependent on someone else's return. ⓘ
- ☐ Jane was over age 18 and a full-time student at an eligible educational institution. ⓘ
- ☐ Jane is blind.
- ☐ Jane is deceased.
- ☐ Jane wishes to contribute \$3 to the Presidential Election Campaign Fund.
- ☐ Jane served in a combat zone during the current tax year. ⓘ
- ☐ Jane was affected by a natural disaster during the current tax year.
- ☐ Jane received, sold, exchanged, gifted, or disposed of a digital asset (or financial interest in a digital asset) in the current tax year.
- ☐ Jane prefers to receive written communications from the IRS in a language other than English.
- ☐ Jane prefers to receive written communications from the IRS in an accessible format.

CANCEL

CONTINUE

## MyFreeTaxes.org Self-Filing Guide

## Select your filing status

**Please note:**

- If you would like to know more about what each filing status is, click the question mark icon next to “**Learn more**”.
- If you are unsure of which filing status to use, click the “**FILING STATUS WIZARD**”.

Click “**CONTINUE**”.What's your filing status? [? Learn more](#)

- ☐ Single
- ☐ Married Filing Jointly
- ☐ Married Filing Separately
- ☐ Head of Household
- ☐ Qualifying Widow(er) with Dependent Children
- ☐ Nonresident Alien

Need help determining your filing status?

FILING STATUS WIZARD

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CONTINUE

Click “**YES**” or “**NO**” to claim dependents on your return.**Please note:**

- If you are a custodial parent or guardian to a child or relative, click “**Yes**” and enter the child(ren)’s information.
- If the dependent you are trying to claim does not have an SSN, ITIN, or ATIN, you will be ineligible to e-file. In that case, you can still file, but will need to submit a paper return. Check out our “In-person help” option through [MyFreeTaxes.org](https://www.myfreetaxes.org).
- If you are unsure if you can claim a dependent, click the question mark icon to learn more.

If you indicated “**YES**”, in the next page, fill in the information for the dependent you are trying to claim. If you have more than one dependent, you will be able to include them after this page.

Click “**CONTINUE**”.

## Dependents or Qualifying Person(s)

Do you have children or relatives who rely on you for support and live in your home? If so, you might be able to receive potential tax credits and tax exemptions that could save you money on your tax bill. But before you get too excited, there are some situations when a child's exemption status is a little more complicated. The IRS does have special rules for those situations. [? Learn more](#)

Do you have any dependents or qualifying person(s) to claim on your return?

YES

NO

## Dependents &amp; Other Qualifying Individual(s)

In this section, you'll add information about all the dependents or qualifying persons you want to claim on your tax return this year. Let's get that taken care of right now!

First name \*

MI

Last name \*

Date of birth \*

MM DD YYYY

Social Security number (ITIN &amp; ATIN also accepted)

The IRS requires a tax ID number for everyone included on your tax return.

☐ Check box if the dependent does not have an SSN/ITIN/ATIN

Was this individual a U.S. citizen, U.S. national, or U.S. resident alien? If they were not, you can't claim the child tax credit or the credit for other dependents for this person. \*

☐ Yes

☐ No

Relationship \*

Please select



## MyFreeTaxes.org Self-Filing Guide

	<p>Number of months this person lived in your home during 2023</p> <p>12</p> <p>Note: If this dependent was born in 2023, you must select 12 months</p> <p>Check all that apply:</p> <p><input type="checkbox"/> This person was over age 18 and a full-time student at an eligible educational institution.</p> <p><input type="checkbox"/> This individual was disabled.</p> <p><input type="checkbox"/> This individual is NOT my dependent. ⓘ</p> <p><input type="checkbox"/> I do NOT wish to claim this individual for Earned Income Tax Credit (EITC) purposes. ⓘ</p> <p><input type="checkbox"/> This dependent is married. ⓘ</p> <p><input type="checkbox"/> This individual made over \$4,700 of income</p> <p>CANCEL CONTINUE</p>
<p>To input another dependent, click <b>"Add a Dependent"</b>.</p> <p>Click, <b>"CONTINUE"</b>.</p>	<p>2023   AMERICAN PLEDGE Help &amp; Support ⓘ</p> <h3>Dependent Summary</h3> <p>+ Add a dependent</p> <p>Mindy Doe Daughter</p> <p>Social Security Number ***-**-**** Date of birth **/**/2020</p> <p>CONTINUE</p>
<p>If you have experienced identity theft or tax fraud and the IRS has provided you with a six-digit Identity Protection Pin, select <b>"Yes"</b>. Learn more about Identity Protection Pins <a href="#">here</a>.</p> <p>If not, select <b>"No"</b>.</p> <p>Click <b>"CONTINUE"</b>.</p>	<h3>IRS Identity Protection PIN</h3> <p>Did you or anyone on your tax return receive a CP01A notice from the IRS containing a 6-digit Identity Protection PIN? ⓘ <a href="#">Learn more</a></p> <p><input type="radio"/> Yes, someone on my return received an Identity Protection PIN.</p> <p><input type="radio"/> No, no one on my return received an Identity Protection PIN.</p> <p>BACK Skip CONTINUE</p>



## MyFreeTaxes.org Self-Filing Guide

Make sure your personal information is all spelled and entered correctly

Click **"Edit"** if anything needs to be reentered.  
Click **"CONTINUE"** when it is all correct.

### Basic Information Summary

Here's what we have so far:



#### Personal Information:

##### Primary Taxpayers:

Jane Doe  
XX/XX/XXXX  
XXX-XX-XXXX  
Free Tax Prep Assistance

[edit](#)

##### Dependents:

Mindy Doe  
Daughter  
XX/XX/XXXX  
XXX-XX-XXXX

[edit](#)



#### Contact Information:

##### Mailing Address:

1234 Anywhere St  
Los Angeles, CA  
Full-Year Resident of This State

[edit](#)

Click **"CONTINUE"** to enter your work and income information.

### Let's do this! #slayit

Now that we know more about you, let's dig into your tax return.

CONTINUE



## MyFreeTaxes.org Self-Filing Guide

**Step 4: Enter Your Income if you had earned income, college scholarships or were self-employed.**  
This includes tax documents such as W-2, 1099-NEC or MISC, 1098-T etc.

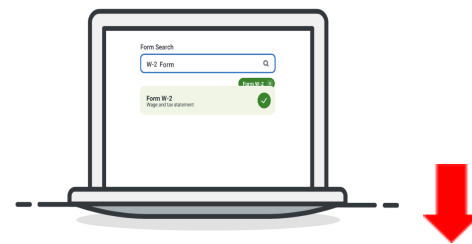
You can add your tax forms quickly with Quick File, if you know which forms you need.

If you do, click **"CONTINUE"**.

If you do not know which forms you need, select **"I do not know"**.

### Add your forms quickly with Quick File

If you know which forms you need, easily search and add them to your tax return.



BACK

I don't know which forms I need

CONTINUE

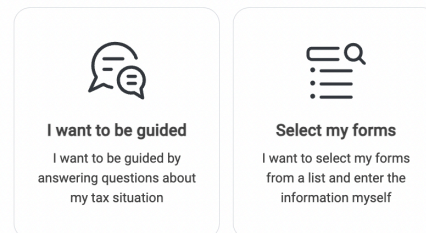
Click either:

- **"I want to be guided"** or
- **"Select my forms"** if you already have all of your documents ready

If you do not have any income from jobs, scholarships, retirement, or other, select **"Skip Income"**.

### Let's look at the money you earned

Now that we've got your basic information covered, it's time to get down to business. Let's start with the money you earned in 2023! How would you like to enter your income?



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Skip Income

CONTINUE

## MyFreeTaxes.org Self-Filing Guide

If you had a part-time, full-time, or seasonal job as an employee, you will have a W-2 from each job you had in 2023.

If you have a W-2 to enter, click **"Yes"**. If not, click **"No"**. Then click **"CONTINUE"**.

## INCOME GUIDE

## Wages &amp; Salary

## Form W-2

Do you have any W-2s to enter? 

☒ Yes 

☐ No

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[Restart/Exit Income Guide](#)

If you clicked **"Yes"** in the previous step, enter the tax document information from your W-2.

**Please note:**

- Type in the information from your W-2 exactly as it is on your tax document
- If you have more than one W-2, you will be able to enter additional W-2s in the next step.

Click **"CONTINUE"**.

## FORM W-2

## Wage and tax statement

Check any of these that apply to you:

Most people won't need to check these boxes.

☐ This is a corrected W-2

☐ This is a substitute W-2


☐ This is a railroad W-2

## Employer information

b - Employer identification number (EIN) \*

c - Employers name \*

Country \*

United States 

Address (number and street) \*

## MyFreeTaxes.org Self-Filing Guide

Select **"Add a W-2 Wage Statement"** if you had more than one job in 2023.

Click **"CONTINUE"**.

### W-2 Wage Statement

+ Add a W-2 Wage Statement

#### Taxpayer

EMPLOYER'S NAME  
XX-XXXXXXX

Income \$XX,XXX.XX  
Tax Withheld \$X,XXX.XX

...

CANCEL

CONTINUE

If you received unemployment compensation in 2023, you should have a 1099-G form.

#### Please note:

- If you receive unemployment benefits, you generally must include the payments in your income when you file your federal income tax return, but they are exempt from California state income tax. Read more on the IRS website [here](#) and on the CA EDD website [here](#).

If this applies to you, click **"Yes"** and then click **"CONTINUE"**. In the next page, click **"BEGIN"** next to **"Add or Edit a 1099-G"** to begin entering information from your 1099-G form.

If you did NOT receive any unemployment compensation, click **"No"** then click **"CONTINUE"**.

#### INCOME GUIDE

### Unemployment Compensation

Form 1099-G Box 1

Did you collect any unemployment benefits from a state or local government assistance program in 2023? ?

☐ Yes

☐ No

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[Restart/Exit Income Guide](#)

CONTINUE

If you received a 1099-G form from the [Franchise Tax Board \(FTB\)](#), click **"Yes"** and then **"CONTINUE"**.

#### Please note:

- Form 1099-G may arrive in the mail, or you may be able to print it from your state's website. The taxable income amount can be found in box 2 and is based on your standard or itemized deductions taken on last year's return.

#### INCOME GUIDE

### Prior Year State & Local Refunds

Did you receive a state or local tax refund for tax year 2022? ?

☐ Yes

☐ No

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CONTINUE

## MyFreeTaxes.org Self-Filing Guide

In the next sections, you will be asked about:

- Interest & Dividend Income (Forms 1099-INT, 1099-OID, 1099-DIV)
  - Includes interest earned on a savings account and dividend earnings from stock and mutual funds.
  - You should receive one of these forms once your earnings have reached \$10. However, all interest and dividend income is taxable on your return even if you didn't receive one of these forms.
- Retirement Account Distributions (Forms 1099-R & RRB-1099-R)
  - Such as a pension, annuity, IRA, or even an insurance contract.
- Deferred Retirement Income (Form 8915-F)
  - If you received a distribution from your retirement plan in 2020 and elected to spread the distribution over three years. The election had to be made on your 2020 return.
- Social Security & Railroad Retirement Benefits (Forms SSA-1099 & RRB-1099)
  - If you received Social Security benefits throughout the year, you should receive Form SSA-1099 that reports amounts including the amount of benefits received (box 5).
  - If you are collecting Tier 1 railroad benefits, you should have received Form RRB-1099.
- Miscellaneous Income (Form 1099-MISC)

In each of these sections, you will indicate **"Yes"** or **"No"** and then click **"CONTINUE"**.

**Please note:**

- Click the question mark icon on any of these pages if you need additional information.

### INCOME GUIDE

## Interest & Dividend Income

Forms 1099-INT, 1099-OID, 1099-DIV

Did you have any interest or dividend income in 2023? 

☐ Yes

☐ No



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[Restart/Exit Income Guide](#)

CONTINUE

### INCOME GUIDE

## Social Security & Railroad Retirement Benefits

Forms SSA-1099 & RRB-1099

Did you receive Social Security or railroad retirement benefits? 

☐ Yes

☐ No



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CONTINUE

### INCOME GUIDE

## Miscellaneous Income

Form 1099-MISC

Did you receive a Form 1099-MISC? 

☐ Yes

☐ No



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[Restart/Exit Income Guide](#)

CONTINUE



## MyFreeTaxes.org Self-Filing Guide

If you worked as a contractor or gig worker or were self-employed, enter the information from your forms 1099-MISC or 1099-NEC.

**Please note:**

- Use this spreadsheet below to add up your qualified business expenses for 2023:  
[+ Annual Self-Employed Income & Ex...](#)

INCOME GUIDE

**Nonemployee Compensation**

Form 1099-NEC

Did you receive a Form 1099-NEC? 

- ☐ Yes
- ☐ No

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[Restart/Exit Income Guide](#)

CONTINUE

If you owned a business or performed contract labor for an employer in 2023, select **"Yes"**. If not, select **"No"** and then click **"CONTINUE"**.

**Please note:**

- Click the question mark icon on any of these pages if you need additional information.

INCOME GUIDE

**Business Owners & Contract Laborers**Did you own a business or perform contract labor for an employer in 2023? 

NOTE:

- If you have farm income, select No. You will fill out a different form later.
- If you already entered income from vendors who sent you a Form 1099-MISC or FORM 1099-NEC, select No. You don't need to re-enter that income.

- ☐ Yes
- ☐ No

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[Restart/Exit Income Guide](#)

CONTINUE


If you sold stocks, bonds or other property:

- Click **"Yes"** and then click **"CONTINUE"**.
- In the next page click **"BEGIN"** next to **"Stocks, Mutual Funds, Cryptocurrency, Collectibles, etc"**. Then enter information from your 1099 consolidated tax statement. Once you are done with that page, click **"CONTINUE"**.

**Please note:**

- A 1099 consolidated tax statement is issued by your brokerage and contains all relevant tax information, including distributions and gains. Some systems do not automatically provide a consolidated tax statement to you. You may need to use a system like Coin Tracker or a similar service that will summarize your sales. Some of these are free and some are paid services.

INCOME GUIDE

**Stocks, Bonds, & Other Personal Property**Do you have sales of stocks, bonds, or other property to enter? 

Common sales reported here are:

- Stocks, bonds, and mutual funds (you typically receive Form 1099-B for these transactions)
- Collectibles, antiques, coins, art, gems, and stamps
- Main or second home (losses not allowed for sale of main home)
- Other personal property, such as cars, computers, etc. (losses not allowed for these types of property)

- ☐ Yes
- ☐ No

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[Restart/Exit Income Guide](#)

CONTINUE



## MyFreeTaxes.org Self-Filing Guide

<https://www.cointracker.io/>

If you did NOT sell stocks, bonds or other property, click **"No"** and then **"CONTINUE"**.

### Investments

Stocks, Mutual Funds, Cryptocurrency, Collectibles, etc.  
Form 1099-B or broker statements

BEGIN

Other Capital Gains Distributions

Capital gains that are not reported on the other forms

BEGIN

Capital Loss Carryover

Unused prior year capital loss

BEGIN

Sale of Main Home Worksheet ⓘ

1099-S/closing documents

BEGIN

CONTINUE

### Capital Gains Transaction

Form belongs to

Jane Doe

Description of Property \*

Date Acquired \*

☐ Alternate Option: If Date Acquired is not known, leave the date blank and select an option here

Date acquired \*

Date Sold \*

☐ Alternate Option:

☐ Check here if a short sale. ⓘ

Date sold \*

Sales Price

☐ \* Alternate Option: If Sale Price is Expired, leave the sales price blank and select an option here

## MyFreeTaxes.org Self-Filing Guide

In this next section, if you have any income in the categories listed, click **"Yes"** and then click **"CONTINUE"**.

**Please note:**

- If you were a half-time or full-time student at a technical or trade school or college, **AND** your scholarships are greater than your tuition, click **"Yes"** in this **"Additional Income Section"**. You will enter these amounts in the "Other Compensation" section, NOT the "Other income that hasn't been entered yet" section.

If you indicated **"Yes"**, in the following pages it will ask you about:

- If you owned any rental properties or received royalties in 2023
- If you owned a farm or received a Form 1099-G with an amount in box 7
- If you received spousal support (alimony) in 2023
- Other income that hasn't been entered yet (things like prizes, awards, jury duty pay, Alaska Permanent Fund, etc.)
- Gambling Winnings
  - This includes winnings from lotteries, casinos, and raffles.
- Schedule K-1 (Partnerships—Form 1065, S-Corporations—Form 1120S, or Beneficiaries of trusts and estates—Form 1041)
- Other Compensation (Includes taxable **scholarships and grants**)

If one of these apply to you, then click **"Yes"**. If not, click **"No"** and then **"CONTINUE"**.

**Please note:**

- Click the question mark icon for additional information.

## INCOME GUIDE

**Additional Income**

Do you have any of the following additional income to enter?


- Rental property & royalties
- Profit or loss from farming
- Spousal support (alimony) received
- Miscellaneous income
- Gambling winnings
- K-1 income
- Qualified education programs
- Cancellation of debt
- Installment income
- Sale of business property
- Unreported tip income
- Foreign earned income
- Contracts & straddles
- Other compensation

☐ Yes  
☐ No

[BACK](#)[Restart/Exit Income Guide](#)[CONTINUE](#)

## INCOME GUIDE

**Other Income**

Do you have any other income that hasn't been entered yet? 

NOTE:

- If you have income that is not required to be filed on a specific form (things like prizes, awards, jury duty pay, Alaska Permanent Fund, etc.), select Yes.
- If you have already entered income from vendors who issued you a Form 1099-MISC, select No. You don't need to re-enter that income.

☐ Yes  
☐ No

[BACK](#)[Restart/Exit Income Guide](#)[CONTINUE](#)

## INCOME GUIDE

**Other Compensation**

Did you receive any of the following types of compensation? 

- Taxable scholarships and grants
- Fringe benefits
- Household employee income (that you did not receive a W-2 for)
- Prisoner earned income
- Foreign earned income

☐ Yes  
☐ No

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## MyFreeTaxes.org Self-Filing Guide

For college students:

Your taxable scholarships and grants are usually reported to you on Form 1098-T in box 5. If you used all of your scholarships and grants for tuition and course-related expenses, this is **NOT** taxable income. You would only need to report an amount as taxable scholarships if you used it to pay for other expenses, such as room, board, and travel.

With this in consideration, if you have taxable income to report from scholarships and grants, follow the steps below:

1. Under the **"Other Compensation"** section, click **"Yes"** and **"CONTINUE"**.
2. Click **"BEGIN"** next to **"Scholarships and Grants (Not reported on W-2)"**.
3. Enter your total scholarships and grants. If you need help figuring out the totals, use this [spreadsheet](#).

Click **"CONTINUE"**.

## Other Compensation

Scholarships and Grants (Not Reported on W-2) 



BEGIN

Fringe Benefits 

BEGIN

Household Employee Income

BEGIN

Prisoner Earned Income

BEGIN

Foreign Earned Compensation

BEGIN

Medicaid Waiver Payments (Not Reported on W-2)

BEGIN

Other Gambling Income not reported on W2-G

BEGIN

CONTINUE

## Scholarships and Grants (Not Reported on W-2)

Taxpayer's scholarships and grants

\$ 4,350



CANCEL

CONTINUE

If you received money from a qualified education program, click **"Yes"** and enter your tax information from your 1099-Q. If not, click **"No"** and then **"CONTINUE"**.

**Please note:**

- Qualified education programs should report all amounts distributed to you on a [Form 1099-Q](#). Generally, only the earnings in box 2 are subject to tax.
- You must first determine what part, if any, of the distribution is taxable before you know what to do with the form. To determine if your distribution is taxable, you need to know how much you paid for qualifying tuition, related fees, books, and

INCOME GUIDE

## Qualified Education Program

Form 1099-Q

Did you receive any money from a qualified education program, such as a Coverdell ESA or qualified tuition program (QTP)?



☐ Yes

☐ No



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CONTINUE

## MyFreeTaxes.org Self-Filing Guide

room and board. Which is larger, the gross distribution in Box 1 of your 1099-Q or the amount of qualifying expenses that you paid for tuition and related fees?

- If the two amounts are equal, or if the amount of Qualifying Expenses is larger, your distribution is not taxable, and you don't need to report this on your return. Retain the Form 1099-Q for your records.
- If the amount in Box 1 is larger, A portion of the distribution is taxable. You will need to enter that portion as taxable income.

Form 1099-Q [Learn more](#)

Gross distribution (Box 1)

\$

Earnings (Box 2)

\$

Actual qualified educational expenses

Also include any amount rolled over to another qualified education program within 60 days

\$

CANCEL

CONTINUE

If you had any cancellation of debt in 2023, click **"Yes"**. If not, click **"No"** and then **"CONTINUE"**.

**Please note:**

- The IRS considers canceled debt to be a form of income, since you received money or property and never had to pay it back. If you had debt canceled, you should receive a Form 1099-C that reports the amount of the debt canceled in box 2.

INCOME GUIDE

## Cancellation of Debt

Form 1099-C Box 2

Did you have any debt cancelled? [?](#)☐ Yes☐ No

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[Restart/Exit Income Guide](#)

CONTINUE

In the following pages, you will be asked you about:

- Installment Sales (Owner Held Mortgage)
- Sale of Business Property
- Unreported Tips
- Contracts & Straddles
- Foreign Earned Income Exclusion (Form 2555)

If one of these apply to you, then click **"Yes"**. If not, click **"No"** and then **"CONTINUE"**.

**Please note:**

- Click the question mark icon for additional information.

INCOME GUIDE

## Installment Sales (Owner Held Mortgage)

Did you make any installment sales? [?](#)

NOTE:

- Installment sales happen when you sell a property at a gain (other than inventory in your business) and will be collecting payments in a tax year after the year that the property was sold. For example: If you sold a car in 2023 but you're still collecting payments in 2024, you would select Yes.

☐ Yes☐ No

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CONTINUE

## MyFreeTaxes.org Self-Filing Guide

**Step 5: Maximize Your Refund by entering in credits and deductions like donations to charity, school expenses, medical or service animal expenses, business expenses and more.**

Deductions help reduce what you owe in taxes, and some provide you with a cash back refund.

Click **"I want to be guided"** if you are not sure which credits and deductions you qualify for. Then click **"CONTINUE"**.

**Please note:**

- If you log out and log back in, you can go directly to this section, by clicking the toolbar on the left, then the "Deductions" category under the "Federal" section of the return.

### Let's see how we can cut your tax bill

How would you like to enter your deductions?



#### I want to be guided

I want to be guided by answering questions about my tax situation



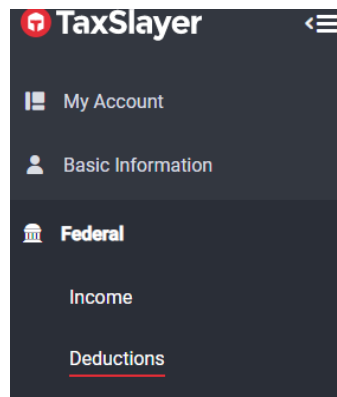
#### Select my forms

I know which credits and deductions I qualify for and want to enter the information myself

BACK

[Skip Deductions](#)

CONTINUE



Custodial parents and former foster youth ages 25+ may qualify for the Earned Income Tax Credit.

Click **"YES"** to explore the possible credits and deductions related to you and your family.

#### DEDUCTIONS GUIDE

### Family Deductions

Do you want to explore possible credits and deductions related to your family?

Covered in this section:

- Child & dependent care costs
- Earned Income Tax Credit (EITC)
- Adoption expenses

☐ Yes

☐ No



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[Restart/Exit Deductions Guide](#)

CONTINUE



## MyFreeTaxes.org Self-Filing Guide

If you paid for child care or the care of a dependent out of your own pocket to be able to work or actively look for work, click **"Yes"** and then **"CONTINUE"**. If not, click **"No"** and then click **"CONTINUE"**.

**Please Note:**

- To claim this deduction, you must identify all persons or organizations that provide care for your child or dependent. You will be asked to include the name, address, and SSN or the employer identification number of the care provider on your return. If the care provider is a tax-exempt organization, only include their name and address. You can use [Form W-10](#), to request this information from the care provider.
- If you can't provide information regarding the care provider, you may still be eligible for the credit.
- For tax year 2023, you may be eligible for 35% of child care or similar costs up to a maximum of \$3,000 for 1 qualifying child under the age of 13 or up to \$6,000 for 2 or more qualifying children! You may also be able to claim this credit for care paid for a spouse or other qualifying dependent who was physically or mentally incapable of self-care. Read more on the IRS website [here](#).

If you clicked **"Yes"**, you will enter the care provider's information and then the amount you paid for each dependent in the following pages.


## DEDUCTIONS GUIDE

**Child & Dependent Care**Did you pay any dependent care expenses to an individual or day care center in 2023? ☐ Yes☐ No

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CONTINUE

**Child and Dependent Care Expenses**Did you pay expenses for the care of a qualifying dependent or individual so that you or your spouse could work or actively look for work? \* ☒ Yes☐ No

BACK

CONTINUE

**Care Provider Information**

Let's get started with some basic information about the care provider.


Please select the provider's type of tax ID number \*

☐ SSN/ITIN☒ Employer identification number (EIN)

Provider's tax ID Number \*

Provider's Name \*

Country \*

United States 



## MyFreeTaxes.org Self-Filing Guide

The EITC is automatically calculated based on the income and personal information you entered. You **DO NOT** need to fill this section out **UNLESS** one of the following situations applies to you:

- You have been previously disallowed the EITC but wish to file it on this year's tax return
- You are a member of clergy and have eligible income to exclude from the EITC calculation
- You are currently ineligible for the EITC

If one of these situations apply to you, then click **"Yes"**. If not, click **"No"** and then **"CONTINUE"**.

## DEDUCTIONS GUIDE

## Earned Income Tax Credit (EITC)

Do you want to explore possible credits and deductions related to you and your family?

## NOTE:

The EITC is automatically calculated based on the income and personal information you entered. Select Yes if one of the following situations applies to you:

- You have been previously disallowed the EITC but wish to file it on this year's tax return
- You are a member of clergy and have eligible income to exclude from the EITC calculation
- You are currently ineligible for the EITC

☐ Yes☐ No

BACK

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CONTINUE

If you paid any adoption expenses, click **"Yes"** and then **"CONTINUE"**. If not, click **"No"** and then click **"CONTINUE"**.

**Please Note:**

- To claim this credit, the adoption generally must have become final during 2023. However, you can also claim this credit if you paid expenses in 2023 for an adoption that didn't become final in 2023.

## DEDUCTIONS GUIDE

## Adoption Expenses

Did you pay any adoption expenses? 

☐ Yes☐ No

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[Restart/Exit Deductions Guide](#)

CONTINUE

Did you own a home or property at any time in 2023? Select **"Yes"** or **"No"**.

If you answered **"Yes"**, in the next sections you will be asked about:

- Mortgage interest
- Real estate taxes
- Home energy credits
- Mortgage credit certificate
- D.C. first-time homebuyer credit
- First-time homebuyer credit repayment

In each of these sections, you will indicate **"Yes"** or **"No"** and then click **"CONTINUE"**.

## DEDUCTIONS GUIDE

## Home &amp; Property Ownership

Did you own a home or property at any time in 2023?

Covered in this section:

- Mortgage interest
- Real estate taxes
- Home energy credits
- Mortgage credit certificate
- D.C. first-time homebuyer credit
- First-time homebuyer credit repayment

☐ Yes☐ No

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CONTINUE

## MyFreeTaxes.org Self-Filing Guide

Charitable Contributions made in 2023 can be claimed up to \$300 if you have donation receipts.

**Please note:**

- You can deduct contributions or gifts that you may have made to various organizations during the tax year. Qualifying contributions can be made in cash, property (clothing, furniture, household items, or vehicles), or out-of-pocket expenses (such as mileage) you paid to do volunteer work for a qualifying organization.
- Charitable contributions are an itemized deduction. If your itemized deductions do not surpass your standard deduction, the refund will not be impacted.

## DEDUCTIONS GUIDE

**Charitable Contributions**

You may qualify for a tax deduction if you made cash charitable contributions to a public charity in 2023.

- If you itemize, you can deduct up to 60% of your Adjusted Gross Income (AGI).

Did you make any charitable contributions in 2023?

Covered in this section:

- Cash contributions (tithes or donations)
- Mileage contributions (driving to and from volunteer work)
- Noncash donations (clothing, furniture, etc.)
- Any charitable contribution carryovers

☐ Yes

☐ No

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[Restart/Exit Deductions Guide](#)

CONTINUE

Did you have a service animal or out of pocket medical and dental expenses?

Indicate **"Yes"** or **"No"** and then click **"CONTINUE"**.

## DEDUCTIONS GUIDE

**Medical Expenses**

Would you like to explore possible credits and deductions related to medical expenses?

Covered in this section:

- Medical & dental expenses
- MSAs
- HSAs
- Health insurance for self-employed

☐ Yes

☐ No

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[Restart/Exit Deductions Guide](#)

CONTINUE

Did you pay for tuition, books, fees, and school supplies for higher education or career training? In this next section, check out credits and deductions specific to college students.

**Please note:**

- Click on the question mark icon before selecting "Yes" to learn more.

Click **"Yes"** then **"CONTINUE"**.

## DEDUCTIONS GUIDE

**Education Expenses**

Would you like to explore possible credits and deductions related to education expenses?

Covered in this section:

- Student loan interest
- Qualified education expenses (such as tuition)

☐ Yes

☐ No

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[Restart/Exit Deductions Guide](#)

CONTINUE

## MyFreeTaxes.org Self-Filing Guide

If you paid any student loan interest in 2023, click **"Yes"** that you paid qualifying education expenses.

**Please note:**


- You should typically receive Form 1098-E that reports any student loan interest you paid. The amount you are eligible to deduct is usually the amount in box 1.

Click **"CONTINUE"**. In the next page, you will input the total interest paid on qualified student loans.

## DEDUCTIONS GUIDE

**Student Loan Interest**

Form 1098-E Box 1

Did you pay any student loan interest in 2023? 

- ☒ Yes
- ☐ No

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[Restart/Exit Deductions Guide](#)

CONTINUE

Click **"YES"** that you paid qualifying education expenses. Click **"CONTINUE"**.


**Please note:**

- Generally, you can deduct qualifying education expenses that you paid for yourself, your spouse, or any dependent that you are claiming on your return.
- You should receive Form 1098-T from your school listing your qualifying tuition and fees. If you did not receive a 1098-T, contact your education institution.

## DEDUCTIONS GUIDE

**Qualified Education Expenses**

Form 1098-T

Did you pay expenses to a qualifying educational institution in 2023? 

NOTE:

- This deduction applies to expenses paid to schools that are eligible to participate in a student aid program administered by the Department of Education (which covers virtually all postsecondary institutions).

- ☒ Yes
- ☐ No

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CONTINUE


Select the student you would like to explore education credits for, then click **"CONTINUE"**.

## EDUCATION GUIDE

**Select a Student**

Please select the student you wish to explore education credits for:

- ☒ Mindy Doe xxx-xx-xxxx
- ☐ Jane Doe xxx-xx-xxxx

 Don't see who you're looking for? Add a dependent or spouse here

CANCEL

CONTINUE

## MyFreeTaxes.org Self-Filing Guide

Answer the questions about your 1098-T form.

**Please note:**

- If you do not have the form, you can request it from your educational institution.

Click **"CONTINUE"**.

EDUCATION GUIDE

### Form 1098-T

Do you have a 1098T form?

Did the student receive Form 1098-T from the educational institution for 2023?

- ☐ Yes  
☐ No



Did the student receive Form 1098-T from the institution for 2022 with box 2 filled in and box 7 checked?

- ☐ Yes  
☐ No



CANCEL

CONTINUE

Enter your school's information from the 1098-T.  
Click **"CONTINUE"**.

### Form 8863 - Add an Institution

Name \*

Country \*

Address (street number & name) \*



ZIP code \*

 - 

City, town, or post office \*

State \*

Enter the Institution's Federal Identification Number (from Form 1098-T) \*

 - 

CANCEL

CONTINUE

## MyFreeTaxes.org Self-Filing Guide

Enter any tuition paid, grants and other qualified expenses. Click **"CONTINUE"**.

EDUCATION GUIDE

### Form 1098-T Information – Anywhere College

If you paid expenses for higher education in 2023, enter the amounts in the corresponding fields to determine the amount eligible for an education tax credit.

Tuition Paid

\$0.00

Grants

\$0.00

Other Qualified Expenses

\$0.00

CANCEL

CONTINUE

Click **"CONTINUE"**.

EDUCATION GUIDE

### Institutions for Student

+ Add Another Institution

Anywhere College

Qualified Expenses \$15,000.00

...

CONTINUE

Confirm that you are eligible for the **American Opportunity Tax Credit (AOTC)** by answering the four eligibility questions.

**Please note:**

- There are two credits available to individuals that qualify to claim a credit or deduction for qualified education expenses paid during the tax year: the **American Opportunity Tax Credit (AOTC)** and the **Lifetime Learning Credit (LLC)**. You may claim only one on your tax return for each student.
- The American Opportunity Credit:
  - Maximum credit of \$2,500 per eligible student
  - 40% refundable / 60% nonrefundable
  - Modified Adjusted Gross Income Limits: \$180,000 Married Filing Jointly / \$90,000 Single
  - Available for 4 years only; only available if the first four years of post-secondary school not completed before the current tax year
  - Student must be pursuing an undergraduate degree and be enrolled at least half-time
  - No felony drug convictions

Click **"CONTINUE"**.

## American Opportunity Tax Credit Eligibility

Answer the following questions to determine your eligibility for the American Opportunity Tax Credit.

Has the American Opportunity Tax Credit or the former HOPE credit already been claimed on four prior tax returns?

- ☐ Yes  
☐ No



Was the student enrolled for at least half of an academic period that began in 2023?

- ☐ Yes  
☐ No



Did the student complete the first four years of higher education before 2023?

- ☐ Yes  
☐ No



Did the student have a felony drug conviction before the end of 2023?

- ☐ Yes  
☐ No



CANCEL

CONTINUE



## MyFreeTaxes.org Self-Filing Guide

If you qualify for the AOTC, click **"CONTINUE"**. If you believe this is incorrect and believe you should receive the LLC, click **"Lifetime Learning Credit"** then click **"CONTINUE"**

**Please note:**

- The Lifetime Learning Credit:
  - Maximum credit of \$2,000 per return
  - Nonrefundable credit (reduces tax owed; does not increase refund)
  - Modified Adjusted Gross Income Limits: \$180,000 Married Filing Jointly / \$90,000 Single
  - Available for all years of post-secondary education for unlimited number of years
  - Student does not need to be pursuing a degree; not required to be enrolled half-time

## EDUCATION GUIDE

**We recommend the American Opportunity Tax Credit**

We've calculated each option you're eligible for to best reduce your taxes owed or maximize your refund. If you don't want to claim the AOTC, you can make another selection below.

**No Credit or Deduction**

Don't claim a credit or deduction

**\$0****Lifetime Learning Credit**

Claim the Lifetime Learning Credit.

Decrease the amount I owe by/Increase my refund by

**\$2000.00**

(Recommended)

**American Opportunity Tax Credit**

Claim the AOTC.

Decrease the amount I owe by/Increase my refund by

**\$2500.00****CANCEL****CONTINUE**

Click **"CONTINUE"**.

## EDUCATION GUIDE

**Education Credit Summary**

+ Add Another Student

Jane Doe

Selected: American Opportunity Tax Credit ...

**CANCEL****CONTINUE**

## MyFreeTaxes.org Self-Filing Guide

In the next sections, deductions will be covered under the following categories:

- Car & Personal Property Expenses (Ex: car registration fees)
- Job-related Expenses
- Various Tax Payments (Ex: If you paid for a tax extension)
- Retirement Investments (Ex: Retirement savings contribution credit, also known as the Saver's credit)
- Casualties and Thefts
- Elderly or Disabled Credit
- Alimony Paid
- Other Deductible Expenses
- Early Withdrawal Penalty
- Other Miscellaneous Deductions

In each of these sections, you will indicate **"Yes"** or **"No"** and then click **"CONTINUE"**.

**Please note:**

- Click the question mark icon on any of these pages if you need additional information.

## DEDUCTIONS GUIDE

**Car & Personal Property Expenses**

Would you like to explore possible credits and deductions related to cars and other personal property expenses?

Covered in this section:

- Car registration fees
- Property taxes on personal property (motor homes, boats, etc.)
- Hybrid cars

☐ Yes

☐ No

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[Restart/Exit Deductions Guide](#)

CONTINUE

## DEDUCTIONS GUIDE

**Job-related Expenses**

Would you like to explore possible credits and deductions for job-related expenses?

Covered in this section:

- Educator expenses
- Moving expenses
- Traveling expenses
- Other job-related expenses

☐ Yes

☐ No

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[Restart/Exit Deductions Guide](#)

CONTINUE

## DEDUCTIONS GUIDE

**Retirement Investments**

Would you like to explore possible credits and deductions related to retirement investments?

Covered in this section:

- IRA deductions
- Retirement savings contribution credit (Saver's credit)
- Investment interest expense deduction
- SEP, SIMPLE, qualified plan contributions

☐ Yes

☐ No

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CONTINUE

## MyFreeTaxes.org Self-Filing Guide

Click **"CONTINUE"**.

### Congratulations

We have gathered all of the possible Deductions that you can use to lower your Tax Liability.

[Would you like to see how some of your deductions compare with the national averages?](#)

CANCEL

CONTINUE

In the next section, you will be asked about any Other Taxes. If any of these categories apply to you, click **"BEGIN"** next to that category. If not, click **"CONTINUE"**.

**Please note:**

- Click the question mark icons if you need additional information.

### Other Taxes

Additional Taxes on Qualified Plans and Other Accounts ⓘ  
Reported on Form 5329

BEGIN

Alternative Minimum Tax (AMT) ⓘ  
Reported on Form 6251

BEGIN

Household Employment Taxes ⓘ  
Reported on Schedule H

BEGIN

Net Investment Income Tax (NIIT)  
Reported on Form 8960

BEGIN

Recapture of Investment Credit  
Reported on Form 4255

BEGIN

Parents' Election to Report Child's Interest and Dividends ⓘ  
Reported on Form 8814

BEGIN

Parents' Election to Report Child's Interest and Dividends ⓘ  
Reported on Form 8814

BEGIN

Recapture of Federal Mortgage Subsidy  
Reported on Form 8828

BEGIN

Repayment of First-Time Homebuyer Credit ⓘ  
Reported on Form 5405

BEGIN

Self-Employment Tax  
Reported on Schedule SE

BEGIN

Social Security and Medicare Tax on Unreported Tip Income ⓘ  
Reported on Form 4137

BEGIN

Tax For Certain Children Who Have Unearned Income ⓘ  
Reported on Form 8615

BEGIN

BACK



CONTINUE

## MyFreeTaxes.org Self-Filing Guide

In the next section, you will be asked about Payments and Estimates. If any of these categories apply to you, click **"BEGIN"** next to that category. If not, click **"CONTINUE"**.

**Please note:**

- Click the question mark icons if you need additional information.

### Payments and Estimates

<b>Amount Paid with Extension</b> ⓘ This is the amount you paid when you applied for a 6-month extension using Form 4868	<b>BEGIN</b>
<b>Federal Estimated Tax Payments</b> ⓘ Federal tax payments already made for 2023	<b>BEGIN</b>
<b>State Estimated Tax Payments</b> ⓘ State tax payments already made for 2023	<b>BEGIN</b>
<b>Other Federal Withholdings</b> ⓘ Federal withholdings you haven't already entered	<b>BEGIN</b>
<b>Other State Withholdings</b> ⓘ State withholdings you haven't already entered	<b>BEGIN</b>
<b>Underpayment of Estimated Tax</b> ⓘ Determine if you owe a penalty for underpayment of estimated tax and next steps	<b>BEGIN</b>
<b>Apply Overpayment to Next Year's Taxes</b> ⓘ You can take the cash now or roll it over to next year's taxes. Up to you!	<b>BEGIN</b>
<b>Vouchers for 2024 Estimated Tax Payments</b> ⓘ Print vouchers for estimated tax payments	<b>BEGIN</b>
<b>IRC 1341 Repayment Amount</b> ⓘ Claim of Right related tax credit	<b>BEGIN</b>

In the next section, you will be asked about Miscellaneous Forms. If any of these categories apply to you, click **"BEGIN"** next to that category. If not, click **"CONTINUE"**.

**Please note:**

- Click the question mark icons if you need additional information.

### Miscellaneous Forms

<b>Allocation of Tax Amounts for Individuals in Certain States</b> ⓘ Reported on Form 8958 (Only for married filing separately and some domestic partnerships)	<b>BEGIN</b>
<b>Application for Automatic Extension of Time to File</b> ⓘ Applied for on Form 4868	<b>BEGIN</b>
<b>Injured Spouse Allocation</b> ⓘ Reported on Form 8379	<b>BEGIN</b>
<b>Form 8857</b> Innocent Spouse	<b>BEGIN</b>
<b>Installment Agreement Request</b> ⓘ Requested on Form 9465	<b>BEGIN</b>
<b>IRS Identification PIN</b> ⓘ This is the PIN you need if you received a CP01A notice from the IRS	<b>BEGIN</b>
<b>Statement of Person Claiming Refund Due a Deceased Taxpayer</b> ⓘ Claimed on Form 1310	<b>BEGIN</b>
<b>Statement of Specified Foreign Financial Assets</b> Form 8938	<b>BEGIN</b>
<b>Application for Tentative Refund</b> Form 1045	<b>BEGIN</b>
<b>Other Miscellaneous Forms</b>	<b>BEGIN</b>

## MyFreeTaxes.org Self-Filing Guide

### Step 6: Answer the Health Insurance - Affordable Care Act (ACA) Insurance Plan Question


To answer the ACA 2023 Question:

- Click **"No"** if you have full-scope Medi-Cal coverage or have insurance through your employer.
- Click **"Yes"** if you paid for health insurance using Covered California.

Click **"CONTINUE"**.

#### Affordable Care Act Insurance Plans

Reported on Form 1095-A

Did you, your spouse, or a dependent have insurance under the Affordable Care Act?   
If so, select Yes – you must report Form 1095-A for the IRS to accept your return. If you did not have an Affordable Care Act insurance plan, select No.

☐ Yes

☐ No

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CONTINUE

### Step 7: Prepare your California State Tax Return

If you would like to file a CA state return, click **"GET STARTED"**. If you only want to file a federal return, click **"Skip state return"**.



Nice work on  
your federal  
return!

Congrats! Now you're ready  
to move on to your state  
return.

NEXT UP

Let's get started on your  
state return

We'll transfer your information from your federal to your state return automatically, so this should be quick! You'll enter some state-specific information, and we'll help you find all possible tax breaks.

If you qualify for a free federal return, you can file a free state return for the following states:

Arizona, Arkansas, Dist of Columbia, Georgia, Idaho, Indiana, Iowa, Kentucky, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, Montana, New York, North Carolina, North Dakota, Oregon, Rhode Island, South Carolina, Vermont, Virginia, West Virginia

Returns for all other states are \$0.00

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Skip state return

GET STARTED



## MyFreeTaxes.org Self-Filing Guide

### CA Renter's Credit:

- Click **"YES"** if you paid rent in CA for at least 6 months of the year.
- It doesn't matter if it is a little amount or through a public program—if you pay monthly rent, select **"YES"**.

### California Return

Did your Name change from your Prior Year tax return?

- ☐ Yes  
☒ No

The Renters Credit is automatically calculated if you answer YES below.

Do you qualify for the Renters Credit?

- ☒ Yes  
☐ No

[Learn More](#)

Use Tax

\$

If your use tax is zero, did you pay your use tax obligation directly to CDTFA?

- ☐ Yes  
☒ No

Did the Taxpayer have Full year minimum essential health care coverage for all members of the household?

- ☒ Yes  
☐ No

Is your Principal/Physical Residence Address the same as the address on the tax return?

- ☒ Yes  
☐ No

County of Principal Residence

--Select--

CONTINUE

Select the county where you live from the drop-down menu.

Click **"CONTINUE"**.

### California Return

#### County of Principal Residence

County of Principal Residence

--Select--

--Select--  
Outside of California  
Alameda  
Alpine  
Amador  
Butte  
Calaveras  
Colusa  
Contra Costa  
Del Norte  
El Dorado  
Fresno  
Glenn  
Humboldt  
Imperial  
Inyo  
Kern  
Kings  
Lake  
Lassen

## MyFreeTaxes.org Self-Filing Guide

Wait! You are not done with the California return yet!

Click **"YES"** to go to the main California Return page and make sure you don't miss out on any CA state-specific tax credits you are eligible for.



**Congrats!** We've created your standard California return based on your federal information.

Some taxpayers have additional items to include. Do you need to add anything else to your California return?

### Common Credits:

- ☒ Was party to a Registered Domestic Partnership
- ☒ Lived or worked in another state(s)
- ☒ Filing Status is Head of Household (Need to Complete CA Form 3532)

NO, CONTINUE

YES, ADD MORE ITEMS

California Return: Click **"EDIT"** on the **"Credits"** section to claim CA state credits.

### California Return

#### Basic Information

Personal info needed for CA return

EDIT

#### Additions to Income

Adjustments for income taxed by CA but not the federal government

BEGIN

#### Subtractions from Income

Adjustments for income taxed by the federal government but not CA

BEGIN

#### Itemized Deductions

State-specific itemized deduction adjustments

BEGIN

#### Credits

State-specific tax credits

EDIT

#### Additional Taxes

Use tax, children with investment income, etc.

BEGIN

#### Contributions

Option to contribute to various CA funds

BEGIN

#### Payments

Confirm all CA withholding tax is entered and other details

BEGIN

#### Health Care Shared Responsibility Tax (Form 3853)

Health Care Shared Responsibility Tax (Form 3853)

EDIT

#### Miscellaneous Forms

Application for extension, underpayment of estimated tax, vouchers for estimated tax payments, etc.

BEGIN

EXIT CALIFORNIA RETURN

## MyFreeTaxes.org Self-Filing Guide

To claim the Foster Youth Tax Credit, click **"EDIT"** on the **"CA Earned Income Credit & Foster Youth Tax Credit"** category.

### California Return

#### Credits

Certain credits are automatically calculated and carried from your Federal return to your California return. Below are additional credits that are available through the state of California. Please review each section and complete the necessary information as it is applicable to your tax situation.

Child Care Credit

BEGIN

College Access Tax Credit

BEGIN

Other Credits

BEGIN

Renters Credit

EDIT

Schedule S, Other State Tax Credit

BEGIN

CA Earned Income Credit & Foster Youth Tax Credit (Form 3514)

EDIT

BACK

On the upper right-hand corner of the page, next to where it says "Foster Youth Tax Credit", click **"BEGIN"** to go to the main Foster Care Tax Credit page.

### CA Earned Income Credit & Foster Youth Tax Credit (Form 3514)

Foster Youth Tax Credit

BEGIN

Has IRS previously disallowed your Federal EIC?

☐ Yes

☒ No

Has CA previously disallowed your CA EIC?

☐ Yes

☒ No

Child #1 reported on CA 3514

EDIT

Child #2 reported on CA 3514

BEGIN

Child #3 reported on CA 3514

BEGIN

In Home Supportive Services (IHSS) payments, or Medicare Waiver payments that are nontaxable for federal purposes that are NOT included on the CA return

\$

Any Medicaid waiver payments, in Home Supportive Services (IHSS) payments, or IHSS supplementary payments that are nontaxable for federal purposes that are included on the CA return.

\$

Prison Inmate Wages and/or Pension from nonqualified plan

\$

Youth Child Tax Credit - Adjust Calculated Net Loss

\$

## MyFreeTaxes.org Self-Filing Guide

Click **"Yes"**, that you are eligible for the Foster Youth Tax Credit.

Click **"Yes"** to give consent for staff to verify you are eligible for the Foster Youth Tax Credit.

### California Return

#### CA Foster Youth Tax Credit

##### Foster Youth Tax Credit Eligibility

A qualified taxpayer that is at least 18 years old and younger than 26 years old as of the last day of the taxable year and is one who was in foster care while 13 years of age or older in an AFDC-FC placement, as described in Section 11402 of the Welfare and Institutions Code (AFDC-FC placements include an approved home a relative, a nonrelative extended family member, a licensed family home of a nonrelative, a licensed group home or short-term residential therapeutic placement, the home of a nonrelated legal guardian, a transitional housing placement for minors or a transitional housing placement for nonminor dependents, an out of state group home, a supervised independent living placement), including a tribally approved home, as defined in subdivision (r) of Section 224.1 of the Welfare and Institutions Code, or Approved Relative Caregiver Funding Program eligible placement, as described in Article 6 (commencing with Section 11450) of Chapter 2 of Part 3 of Division 9 of the Welfare and Institutions Code, by a Title IV-E agency, pursuant to a voluntary placement agreement or a juvenile court order.

Is the Taxpayer eligible for the Foster Youth Tax Credit?

- ☒ Yes  
☐ No

Taxpayer - Do you give consent and authorize the California Department of Social Services to share limited information about you with the California Franchise Tax Board for purposes of verifying your eligibility for the FYTC?

- ☒ Yes  
☐ No

**If your name changed** since you were in foster care, type in your first, middle initial, and last name while in foster care. This is so you can be verified correctly.

**Otherwise**, leave it blank.

If the Taxpayer's name was different while in foster care than name on tax return (FTB relies on the information entered on the tax return to verify taxpayer eligibility for the credit), enter that information below:

Taxpayer's First Name while in foster care if different than what is on the tax return

Taxpayer's Middle Initial while in foster care if different than what is on the tax return

Taxpayer's Last Name while in foster care if different than what is on the tax return

If you have proof of foster care (verification letter or ward of the court letter), click **"BEGIN"**.

On the next page, upload the PDF letter and click **"DONE"**. Then click **"CONTINUE"** on the following page.

If you are providing consent above, you may attach to this return a PDF letter issued by a county or state agency confirming each individual who claims the FYTC status as a foster youth at or after age 13, or other proof of status as a condition of receiving the FYTC. Below are samples of other proof/supporting documentation that may be provided:

- CDSS Foster Care Verification Form
- County-issued Letter

BEGIN

## MyFreeTaxes.org Self-Filing Guide

**Please note:**

- Keep the CA Department of Social Services contact information in case you need it later.

### California Return

Please add a(n) CA 3514 Foster Youth Credit Proof of Status PDF Attachment



Drag and Drop PDF here, to upload a(n) CA 3514 Foster Youth Credit Proof of Status PDF Attachment

DONE

If consent and/or the proof you submit does not result in satisfactory proof of your eligibility, you may be contacted to provide additional proof, which may delay a decision on your eligibility.

To request information needed to verify your status as a foster youth at or after age 13, contact:

- California Department of Social Services (CDSS)
- Telephone: 916.651.8848
- Email: [pliar@dss.ca.gov](mailto:pliar@dss.ca.gov)
- Mail: 744 P Street, Sacramento, CA 95814
- Out-of-State Inquiries: [cdss.osi@dss.ca.gov](mailto:cdss.osi@dss.ca.gov)

A decision on your eligibility for the FYTC may be delayed or denied if your eligibility is not confirmed by CDSS or you do not provide satisfactory proof of your eligibility to the FTB. For that reason, we recommend that you check the applicable box to provide your consent and/or attach proof of your status as a foster youth at or after age 13 to your tax return.

BACK

CONTINUE

Click **"NO"** or **"YES"** to "Has the IRS previously disallowed your Federal EIC?"

Click **"NO"** or **"YES"** in response to "Has CA previously disallowed your CA EIC?"

Leave the rest of the questions blank unless they apply to you.

Click **"CONTINUE"**.

When you are redirected to the **"Credits"** page, click **"Back"** if you are done checking through CA state credits. If not, click **"Edit"** or **"Begin"** next to the other categories under **"Credits"**.

### Has IRS previously disallowed your Federal EIC?

☐ Yes

☒ No

### Has CA previously disallowed your CA EIC?

☐ Yes

☒ No



## MyFreeTaxes.org Self-Filing Guide

Make sure to enter any additional information that may apply to your personal circumstances on your State Return.

Once you are done, with the previous sections, click on **"EXIT CALIFORNIA RETURN"**.

## California Return

## Basic Information

Personal info needed for CA return

[EDIT](#)

## Additions to Income

Adjustments for income taxed by CA but not the federal government

[BEGIN](#)

## Subtractions from Income

Adjustments for income taxed by the federal government but not CA

[BEGIN](#)

## Itemized Deductions

State-specific itemized deduction adjustments

[BEGIN](#)

## Credits

State-specific tax credits

[EDIT](#)

## Additional Taxes

Use tax, children with investment income, etc.

[EDIT](#)

## Contributions

Option to contribute to various CA funds

[BEGIN](#)

## Payments

Confirm all CA withholding tax is entered and other details

[BEGIN](#)

## Health Care Shared Responsibility Tax (Form 3853)

Health Care Shared Responsibility Tax (Form 3853)

[EDIT](#)

## Miscellaneous Forms

Application for extension, underpayment of estimated tax, vouchers for estimated tax payments, etc.

[BEGIN](#)[EXIT CALIFORNIA RETURN](#)

Click **"CONTINUE"**.

## State Return



If you need to change your state residency status just delete the current return and start again.  
State forms differ by the type of residency you select.

[Add Another State Return](#)

California  
Resident

[CONTINUE](#)

## MyFreeTaxes.org Self-Filing Guide

Make sure to double-check that any credits you were eligible for are reflected in the summary (e.g. Earned Income Tax Credit, Child Tax Credit, Education Credits, CalEITC, Young Child Tax Credit, Foster Youth Tax Credit, Renters Credit, etc.)

**Please note:**

- Review your Total Income, Tax Credits and Refund Amounts by clicking **"View Return"**.

If everything looks okay, then click **"CONTINUE"**.

### Tax Return Summary



Total Income

Adjusted Gross Income

Tax and Credits

Total Tax

Payments

Refund

California Refund

PRINT

VIEW RETURN

BACK

File Your Return. Click **"Yes, I'm done with my return(s) and ready to file!"**.

**Please note:**

- Make sure you have your Adjusted Gross Income (AGI) from the prior year tax return, which allows you to file your return electronically.
- If you do not know your AGI, you add up how much money you earned last year.

### Ready to file?

If you're done with all the returns you need to file, we can get some final details and finish up!

Are you ready to keep going?

☒ Yes, I'm done with my return(s) and ready to file!

☐ No, I'm not ready.



BACK

CONTINUE

When your Federal and/or state return(s) have been processed, **an automatic notification is sent to the e-mail address** associated with your account as well as to the mailbox within your account located in the navigation menu on the left side of the screen. **If you did not receive the email notification**, please be sure to add TaxSlayer to your safe senders list so that our messages are not delivered to your SPAM or JUNK folder.



### We've received your tax return.

You'll receive an e-mail from us within 12-24 hours notifying you of your return status once it has been reviewed by the IRS.

Please note: If you filed any state returns, they will not be sent to state taxing authorities until your federal return has been accepted. You will receive an email from us once your state processes your return notifying you of your return status.

Thank you for choosing TaxSlayer!

## MyFreeTaxes.org Self-Filing Guide

### Check the status of your return

Log in to your account from the TaxSlayer homepage and access your Federal and/state return(s) directly from the **"My Account"** screen. If the status says **"Sent"**, it means your return was received but has NOT yet been accepted. If the status says **"Accepted"**, that means your return has been received AND accepted.

Your **2023 tax return** was  
accepted by the IRS.

TRACK REFUND

ACCESS MY RETURN

RETURN

STATUS

Federal

Accepted ⓘ

California

Sent ⓘ

PRINT ▾

VIEW DETAILS

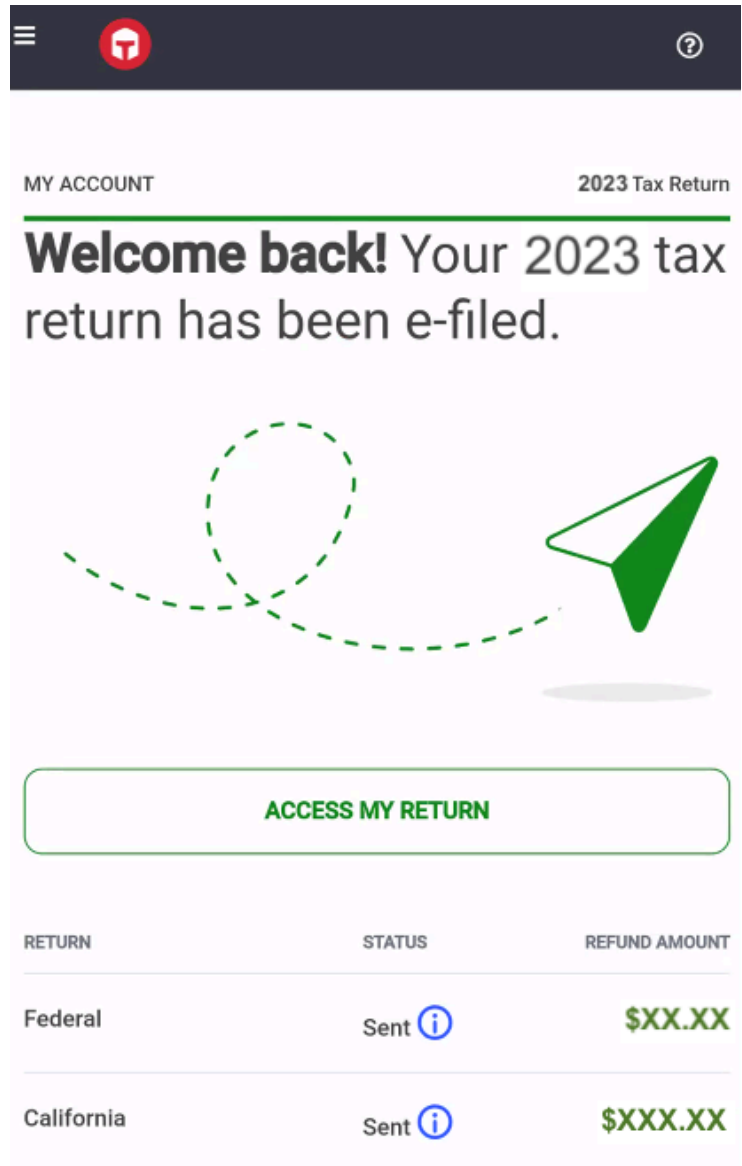
## MyFreeTaxes.org Self-Filing Guide

### Print your return



Once your Federal and/or state return(s) have been accepted, you will be able to log in to your account from the TaxSlayer **homepage** and access your accepted Federal and/state return(s) directly from the **"My Account"** screen. You will click on **"Access My Return"**.

**Please note:**

- Save a copy of your return and your tax documents and receipts on a password protected computer, or print a copy and save your return in a locked filing cabinet along with your tax documents.



The screenshot shows the 'MY ACCOUNT' page for a 2023 Tax Return. It features a welcome message, a green paper airplane icon, and a table of e-filed returns.

RETURN	STATUS	REFUND AMOUNT
Federal	Sent 	\$XX.XX
California	Sent 	\$XXX.XX

## MyFreeTaxes.org Self-Filing Guide

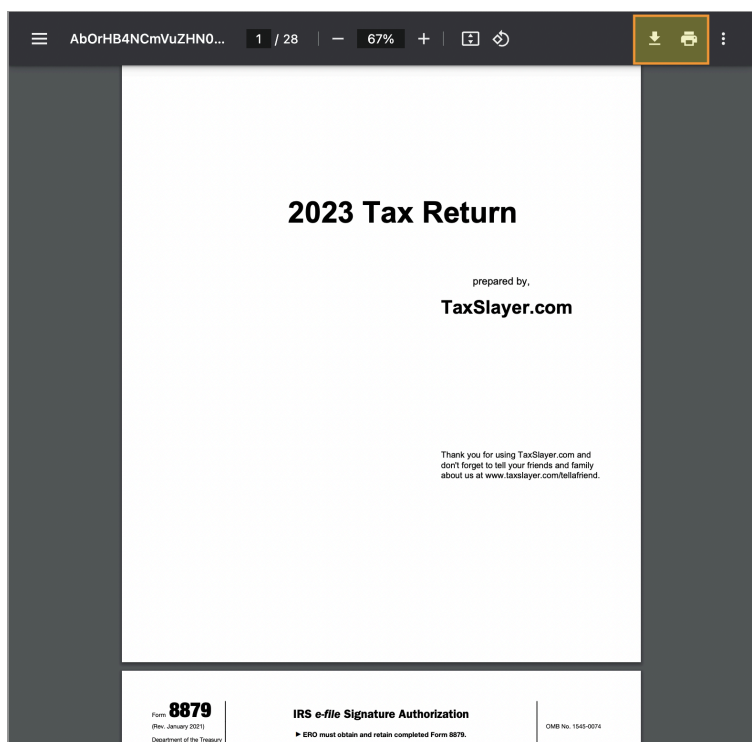
Click on the toolbar on the left and then click on **"Summary/Print"**. When you see the summary, scroll down and click on **"PRINT"**.

Select **"Print all"**.



## MyFreeTaxes.org Self-Filing Guide

You can save your return on your computer or phone as a PDF or print it.



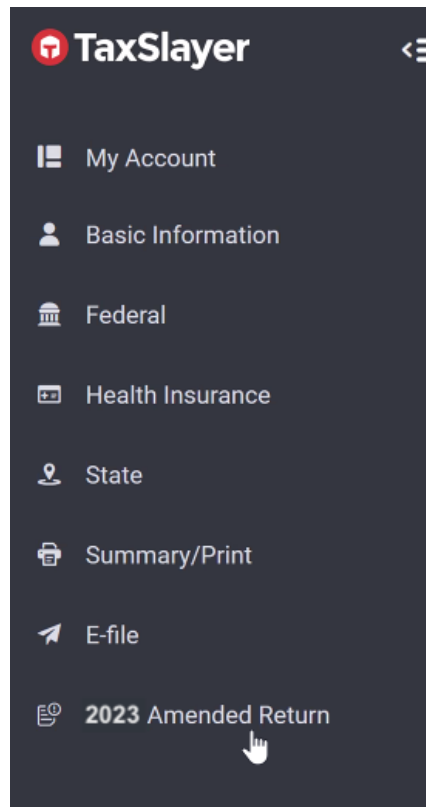
## MyFreeTaxes.org Self-Filing Guide

## Filing an Amended Tax Return using TaxSlayer

Did you already file but need to file an Amendment? You may have missed a document, chosen the wrong filing status, not claimed a dependent, or missed a credit or deduction. If so—follow the directions below to correct your tax return. *Please note, TaxSlayer only allows filing and amending current year returns.*

To start amending your return, select “**E-file**” in the main navigation menu. Then, select the “**2023 Amended Return**” menu item that appears below it in the navigation menu.

Check the box that says, “**I understand the purchase of an amended return is nonrefundable**”. Click “**GET STARTED**”.



## Let's start your amended return

☐ I understand the purchase of an amended return is nonrefundable.

BACK

GET STARTED

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Once you have completed your amended return, select “**CONTINUE**” at the bottom of the Amended Return menu to choose how you wish to file it. If you choose to e-file, complete the process to file your Amended Return the same way as your Federal Return.

## MyFreeTaxes.org Self-Filing Guide

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### Need to check the status of your refund?

#### Federal Refund Status:

To check the status of your federal refund, visit the IRS website by clicking the following link: [“Where’s My Refund?”](#). You can also check the status of your federal refund by phone by calling the IRS Refund Hotline at 1-800-829-1954.

#### CA State Refund Status:

To check the status of your California state refund, visit the Franchise Tax Board website by clicking the following link: [“Where’s My Refund?”](#). You can also call the FTB customer service line at 800-852-571 on weekdays from 8 AM to 5 PM.

### Need a payment plan?

If you have a large tax payment and are unable to pay it all at once, you have the ability to apply for a payment plan. First, you’ll need to see if you qualify, then you’ll need to apply directly with the IRS or Franchise Tax Board.

- To apply for a payment plan with the IRS (federal taxes) click [here](#).
- To apply for a payment with the Franchise Tax Board (California) click [here](#).

### Need to contact Customer Support?

Are you running into technical issues? Contact customer support through any of the following methods:

- Website: <https://myfreetaxes.com/support>
- Main Helpline: 866-698-9435  
Available 7am-3pm PT daily from February 6–April 18, and 7am-3pm PT daily from April 19 – October 31.
- Email: [info@myfreetaxes.com](mailto:info@myfreetaxes.com)