MyFreeTaxes.org TaxSlayer Self-Filing Guide

The purpose of this guide is to walk you through the process of self-filing your taxes from start to finish using the free TaxSlayer tax preparation software link provided by MyFreeTaxes.org.

Filing on your own can be a great option if you're filing a current-year tax return, feel comfortable using online tax software, and want to learn how to file on their own.

To supplement this guide, we also offer video tutorials, available here in English and here in ASL. These were originally created for the 2021 tax season, but they can still be helpful as a reference in future years.

Please note: Tax laws, credit amounts, and the software's appearance may change slightly each year. While the overall steps usually stay the same, some details may differ from what's shown in this guide. To stay up to date, we've included IRS links throughout so you can double-check credit amounts and eligibility as you go.

United Ways of California

MyFreeTaxes.org TaxSlayer Self-Filing Guide

Step 1: Go to MyFreeTaxes.org

<table>
<tr>
<td>

Go to MyFreeTaxes.org.

Click “**File on my own**”.

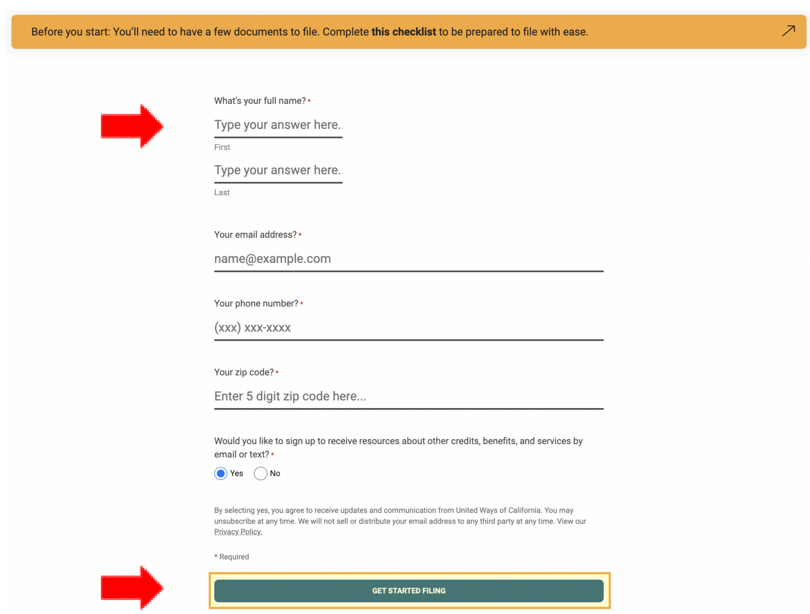
</td>
<td>

</td>
</tr>
<tr>
<td>

Scroll down and enter your contact information

Click “**GET STARTED FILING**”.

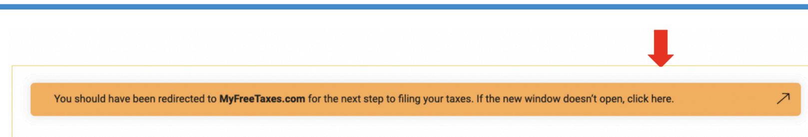
</td>
<td>



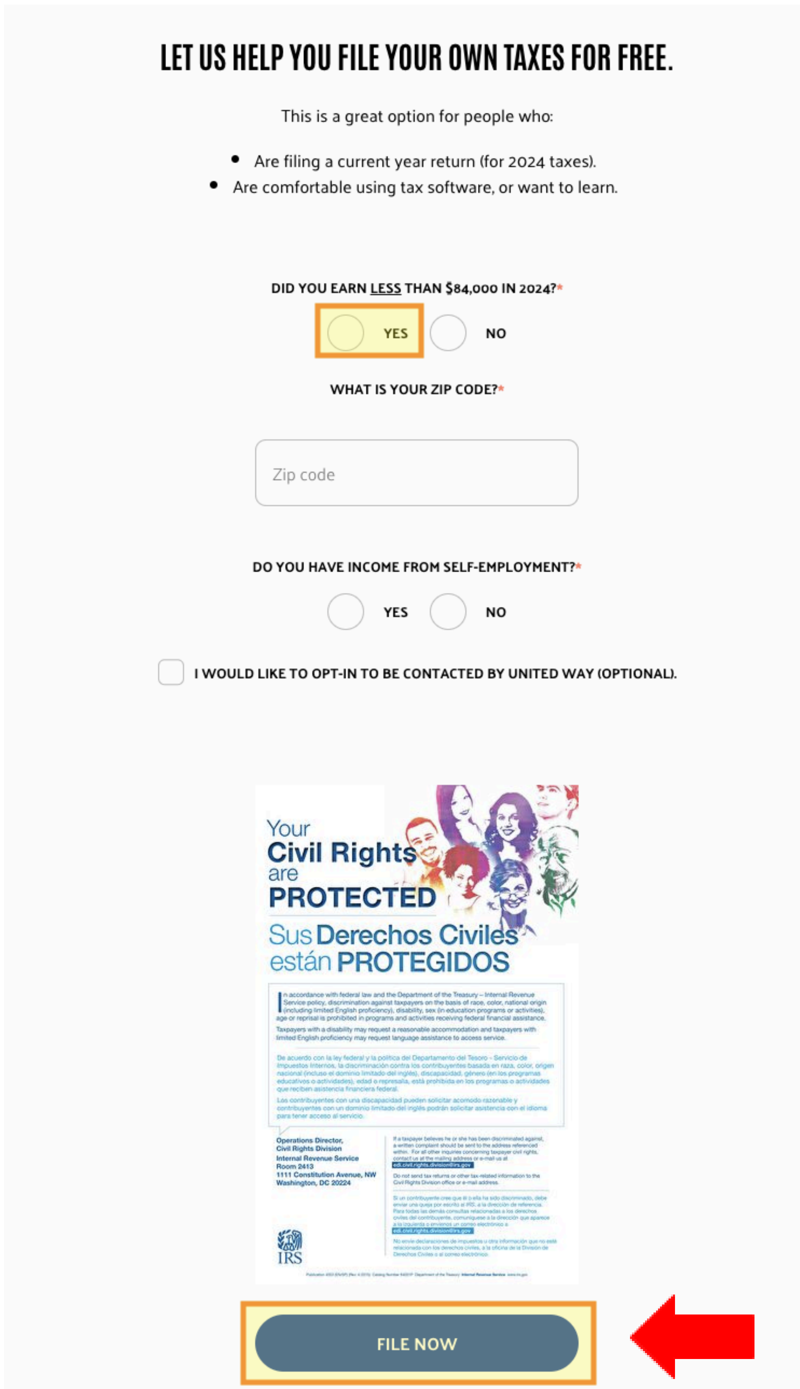
</td>
</tr>
<tr>
<td>

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**”.

</td>
<td>

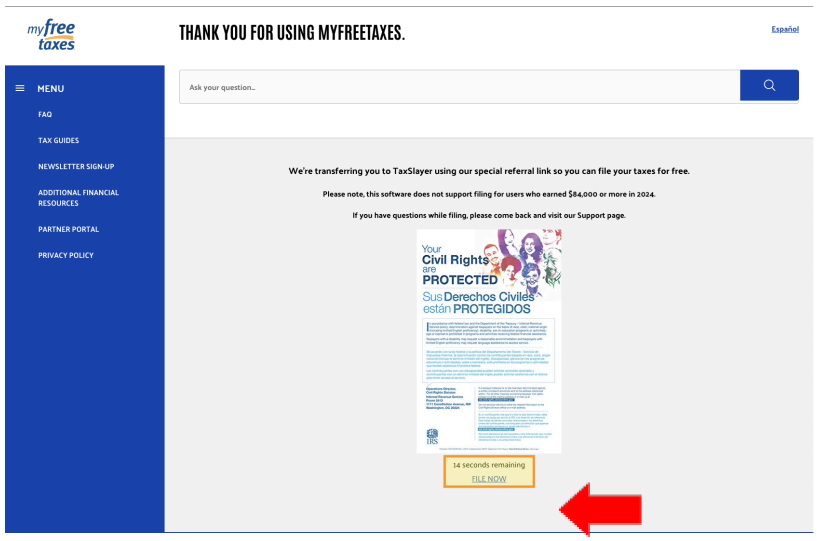


</td>
</tr>
</table>

Indicate if you earned less or more than the amount listed in the prompt, type in your zip code, and indicate if you had income from self-employment. • ***Please note***, that if you made more than the amount in the prompt, 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**".	

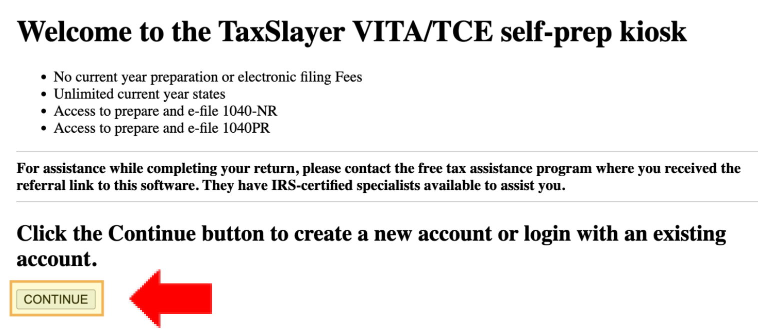
In 15 seconds, our MyFreeTaxes.org page will automatically redirect you to the TaxSlayer VITA/TCE self-prep kiosk page.

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.

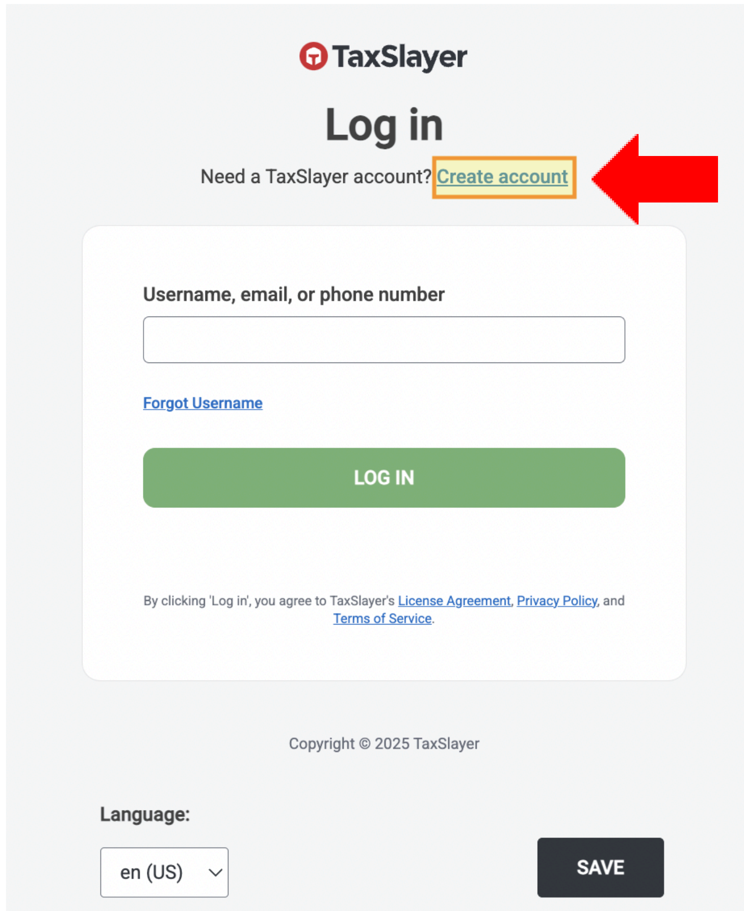


Step 2: Create an account with TaxSlayer - the free IRS self-filing website

If this is your first time creating a TaxSlayer account for the current tax year, 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”** in the next page.
- If you run into any issues with the link, contact the main helpline at: 866-698-9435.



Complete the information necessary to create an account.

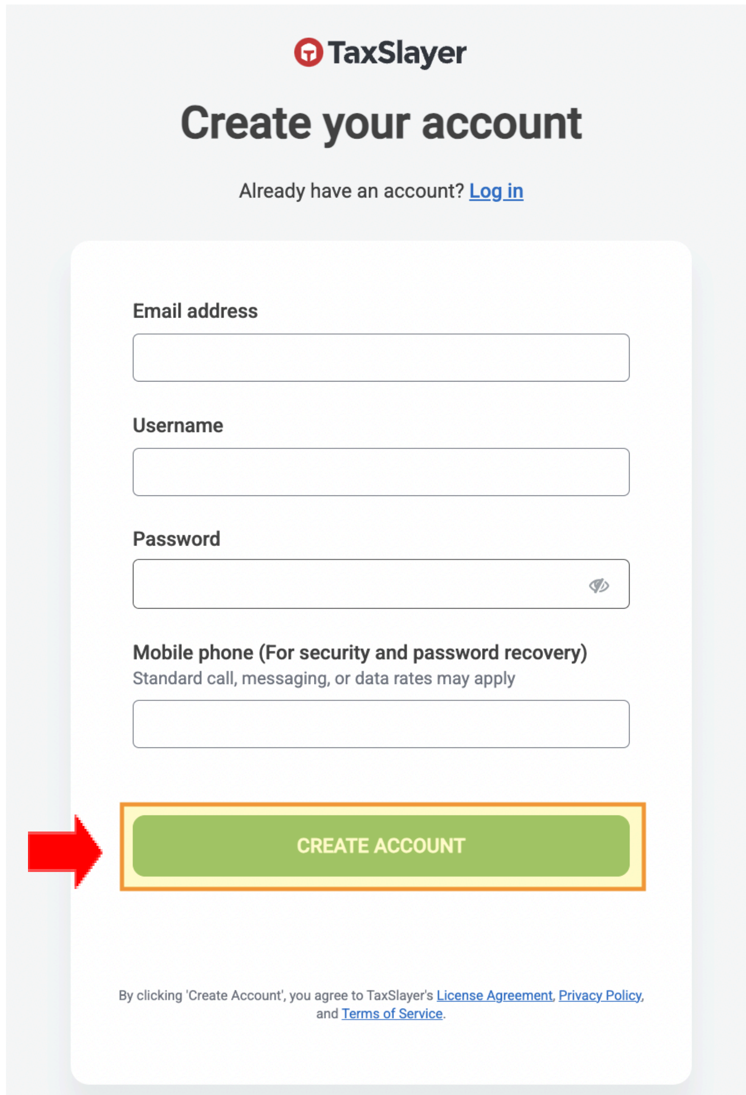
You will be asked to verify your account via text message on the next page.

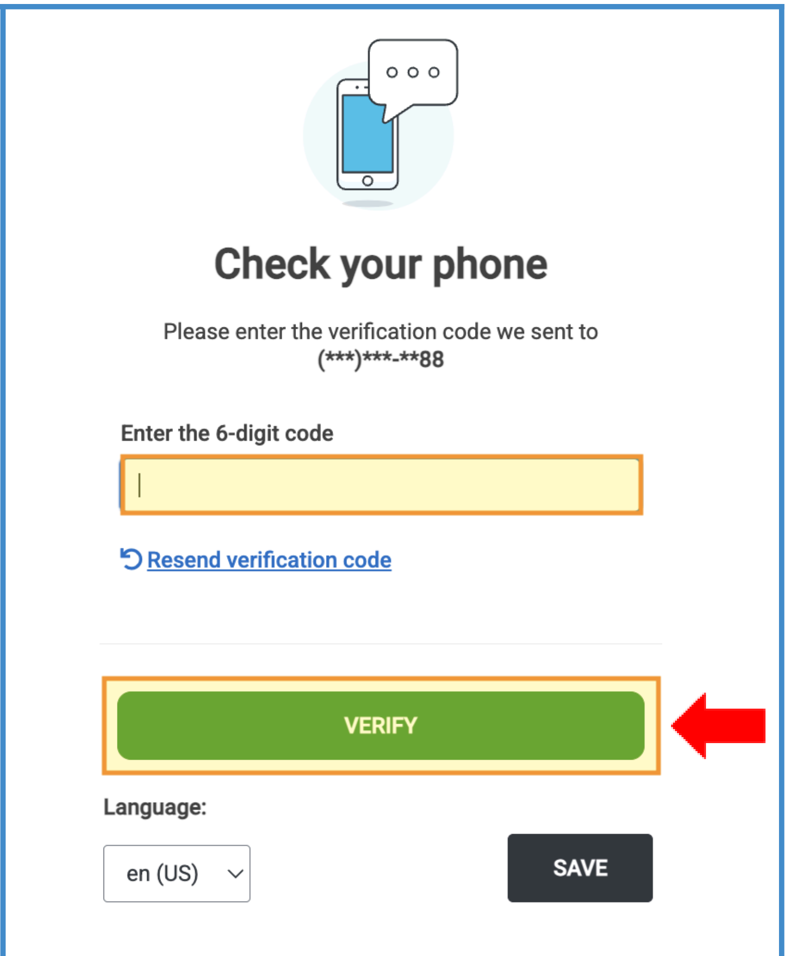
Please note:

- 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.

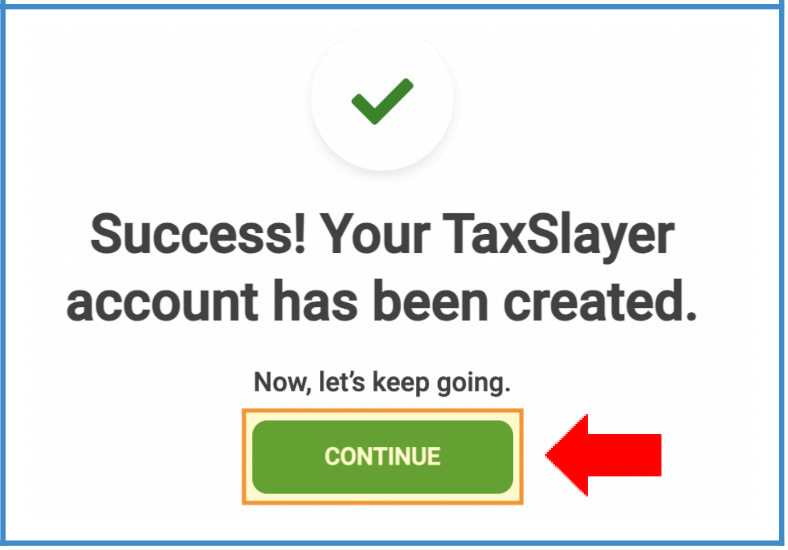
Click **"Create Account"**.

You will receive an email in your inbox to verify your email. You do not have to do this right away.

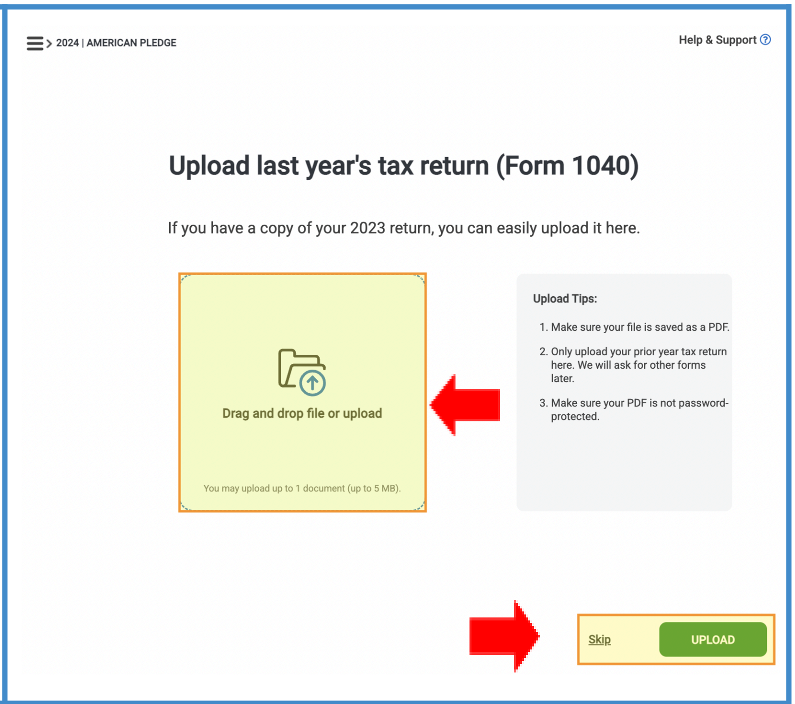




Click **"CONTINUE"** to begin your tax return.

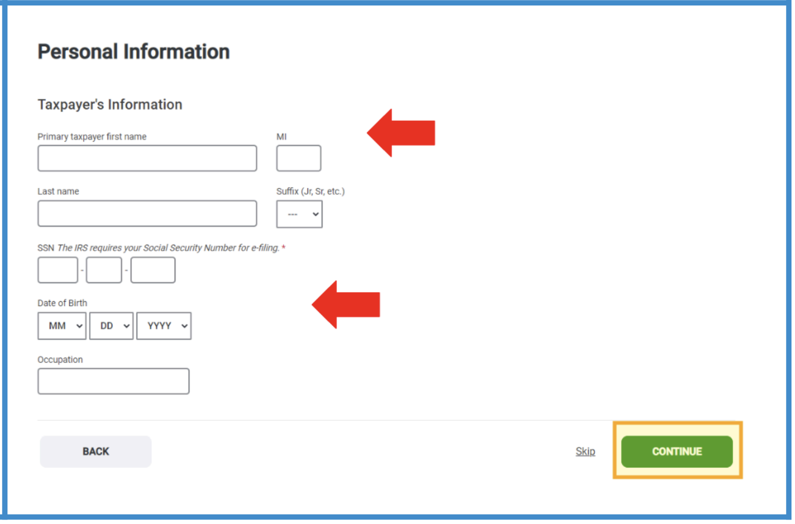


Step 3: Begin self-filing your tax return with TaxSlayer

<table>
<tr>
<td>
If you have last year’s tax return, you can upload it and click “VIEW RESULTS”.
If not, click “Skip”.
</td>
<td>


</td>
</tr>
<tr>
<td>
Type in your personal information
<u>Please note:</u>

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

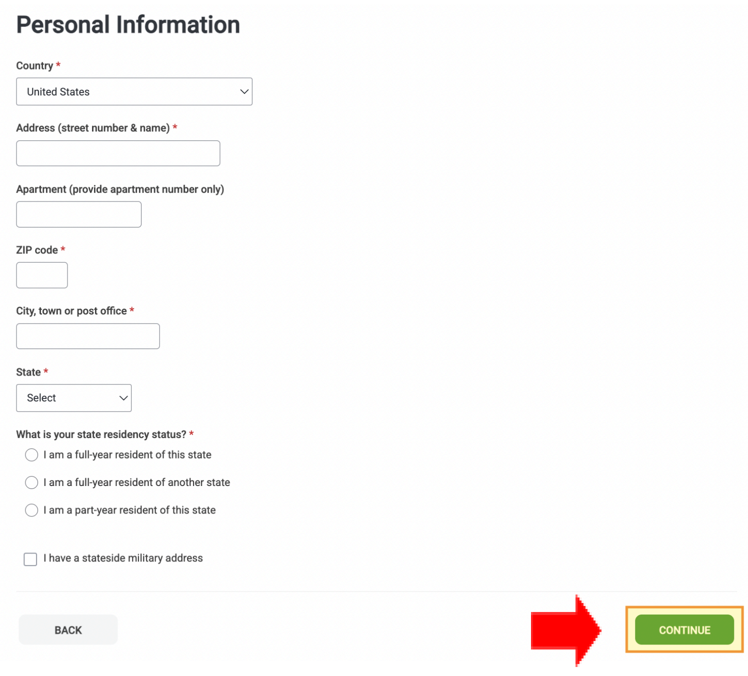
Click “CONTINUE”.
</td>
<td>


</td>
</tr>
</table>

<table>
<tr>
<td>
Enter your mailing address and residency status.

<u>Please note:</u>

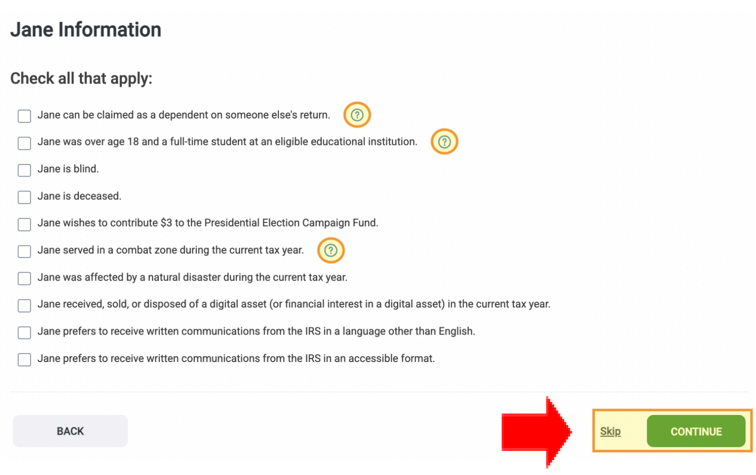
If you do not have a mailing address, ask a shelter, clinic, or youth center to use their address and use that information.
For residency status, select “Full-Year of the State” if you lived in California the whole year. If you moved to California in the current year and lived in a different state last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

Click “CONTINUE”.
</td>
<td>


</td>
</tr>
<tr>
<td>
Click on any checkbox that applies to you, or leave them blank.

<u>Please note:</u>

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

Click “CONTINUE”.
</td>
<td>


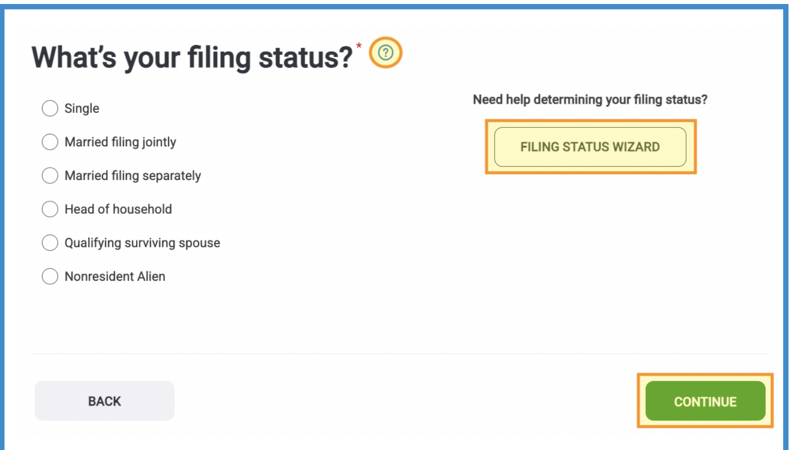
</td>
</tr>
<tr>
<td>
Select your filing status

<u>Please note:</u>

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

</td>
<td></td>
</tr>
</table>

Click **“CONTINUE”**.



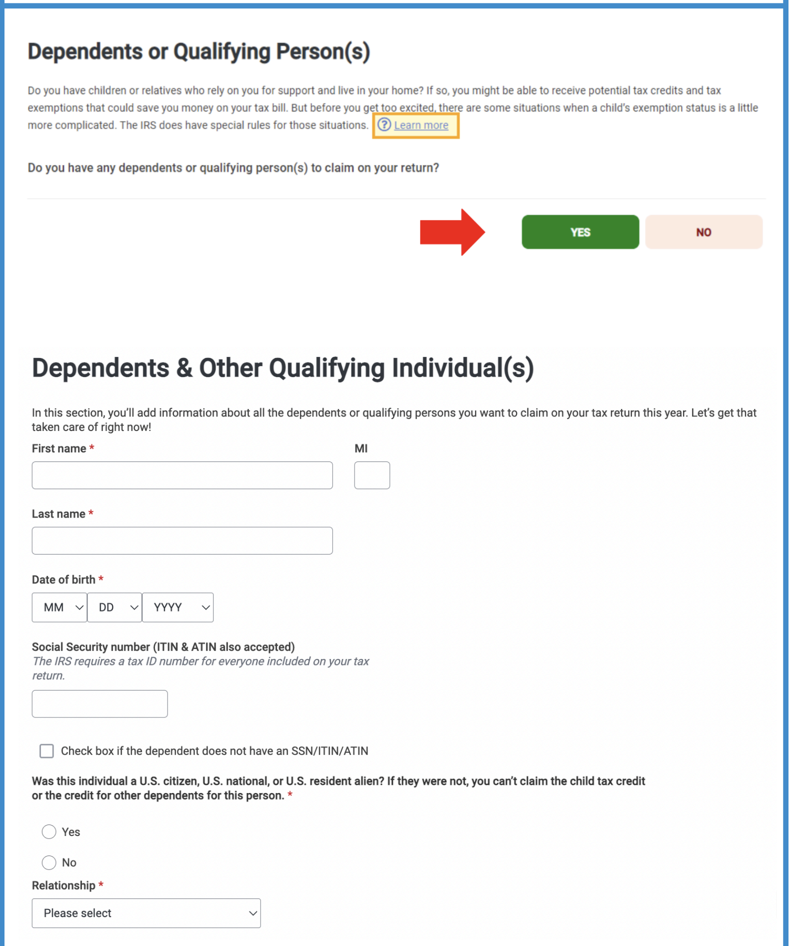
Click **“YES”** or **“NO”** to claim dependents on your return.

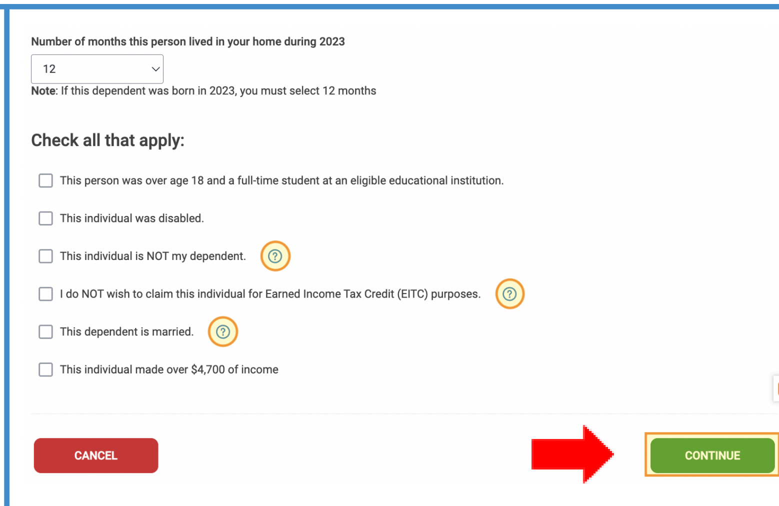
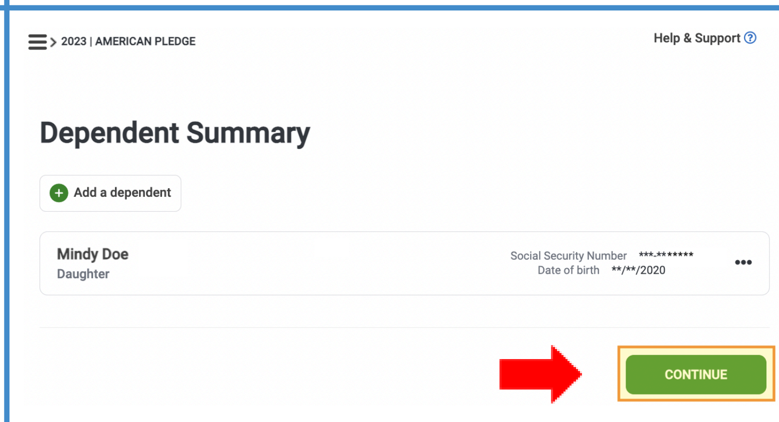
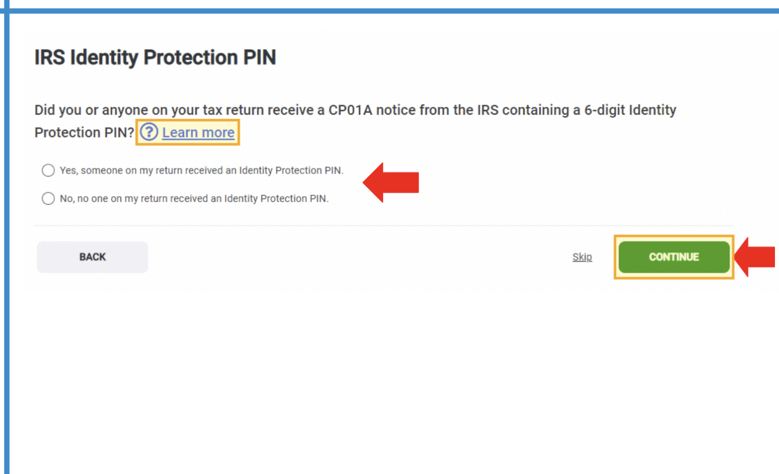
<u>Please note:</u>

- If you are a custodial parent or guardian to a child or relative, click **“Yes”** and enter their 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 [“Prepare Taxes for Me In-Person”]() option through MyFreeTaxes.org.
- If you are unsure if you can claim a dependent, click the question mark icon to learn more.

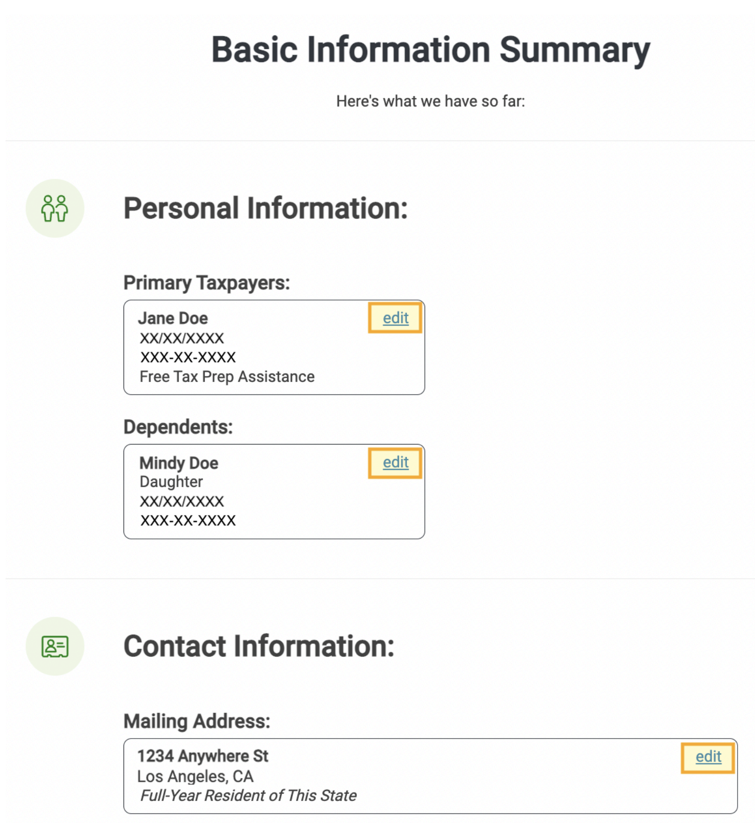
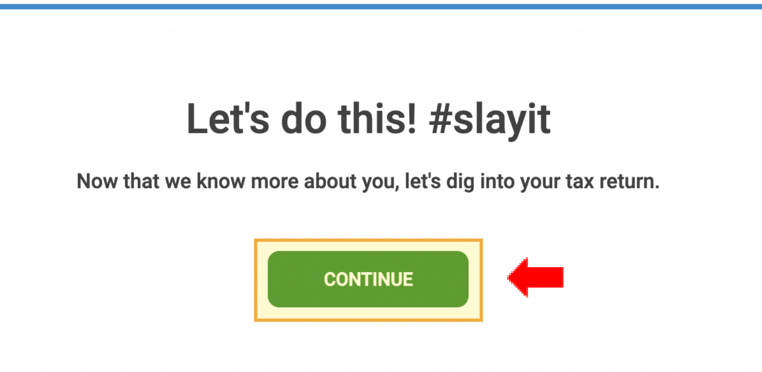
If you indicated **“YES”**, in the next page, fill in the information for the dependent you are trying to claim. If you have more than one dependent, you will be able to include them after this page.

Click **“CONTINUE”**.



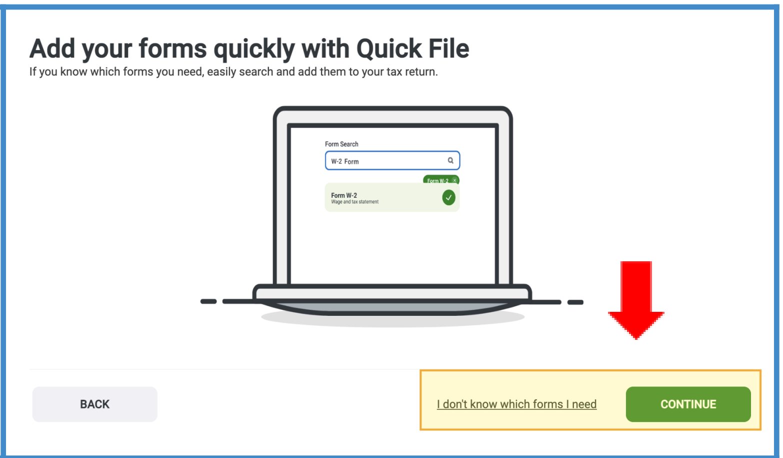
	
To input another dependent, click **“Add a Dependent”**. Click, **“CONTINUE”**.	
An Identity Protection Pin (IP PIN) is a special six-digit number issued by the IRS to protect against tax-related identity theft. If you requested an IP PIN or the IRS assigned you an IP PIN, select “Yes”. You will need to include your IP PIN or your return will be rejected. Each year, a new IP PIN will be issued to you. Read about IP PINs here. If you did not request or receive an IP PIN, select “No”. Click **“CONTINUE”**.	

<table>
<tr>
<td>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.</td>
<td>
</td>
</tr>
<tr>
<td>Click “CONTINUE” to enter your work and income information.</td>
<td>
</td>
</tr>
</table>

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.

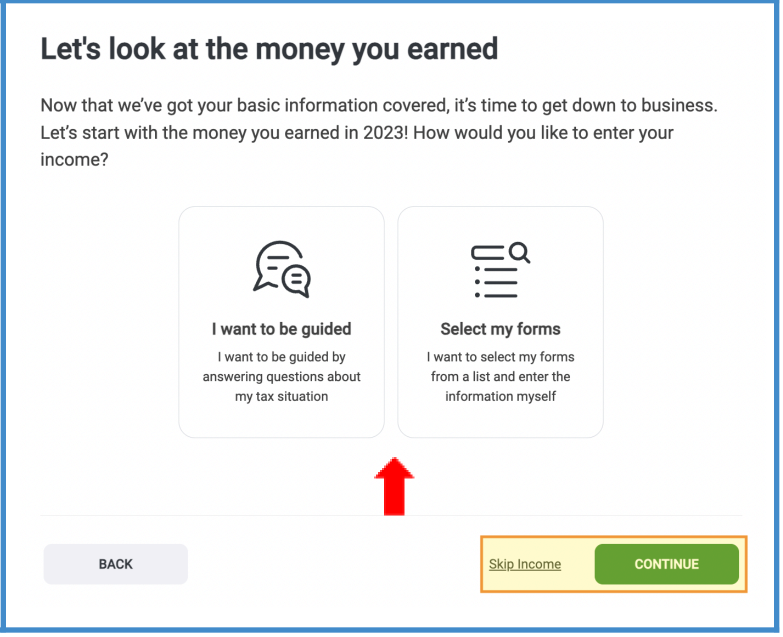
<table>
<tr>
<td>
You can add your tax forms quickly with Quick File, if you know which forms you need.
If you do, click “CONTINUE”.
If you do not know which forms you need, select “I do not know”.
</td>
<td>



</td>
</tr>
<tr>
<td>
Click either:

“I want to be guided” or
“Select my forms” if you already have all of your documents ready

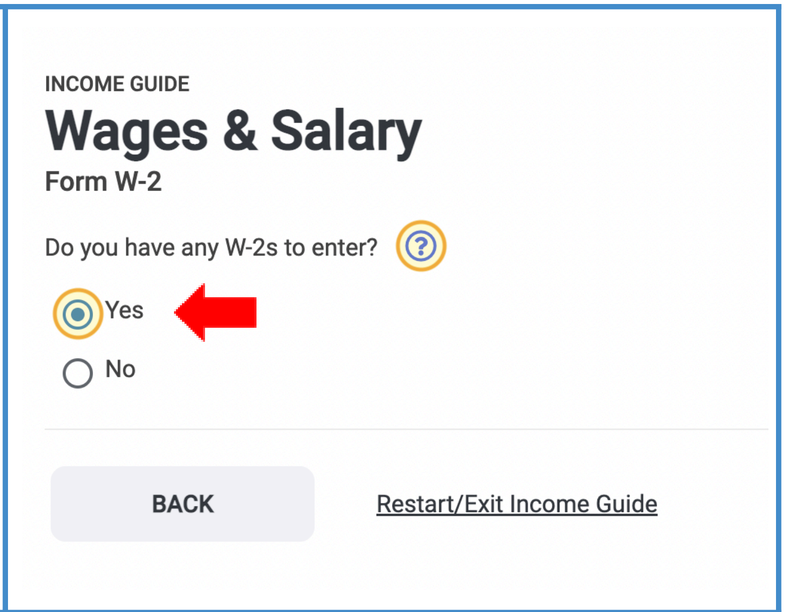
If you do not have any income from jobs, scholarships, retirement, or other, select “Skip Income”.
</td>
<td>



</td>
</tr>
</table>

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 throughout the tax year.

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

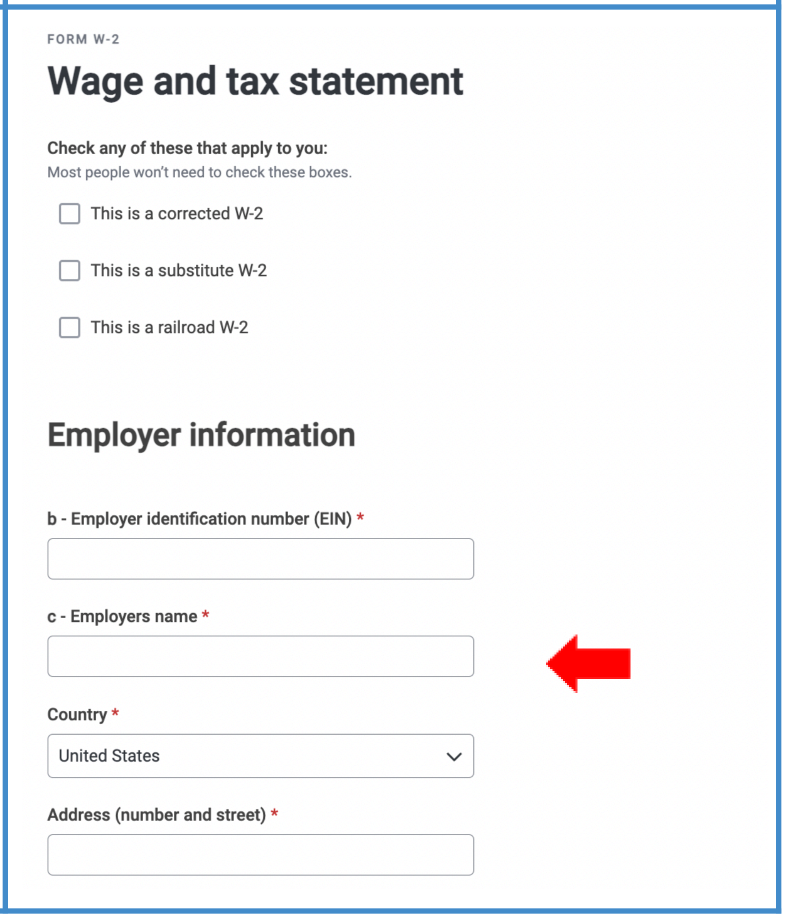


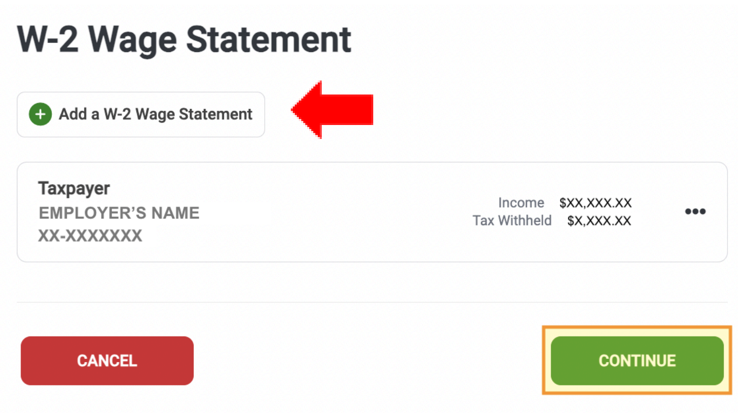
If you clicked **"Yes"** in the previous step, enter the tax document information from your W-2.

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.

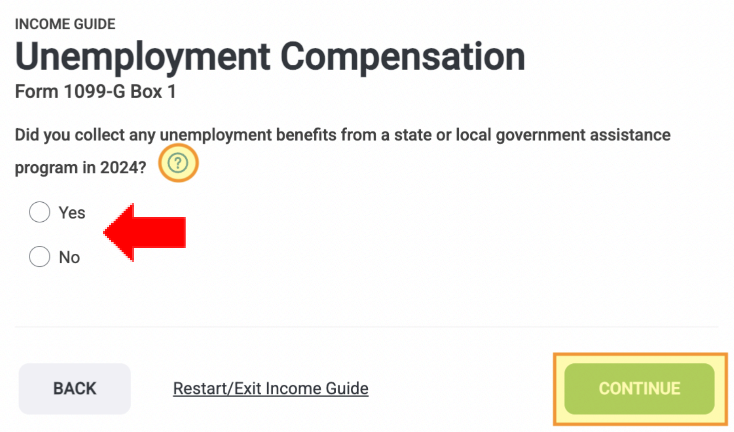
Click **"CONTINUE"**.



<table>
<tr>
<td>
Select “Add a W-2 Wage Statement” if you had more than one job in the tax year.
Click “CONTINUE”.
</td>
<td>


</td>
</tr>
<tr>
<td>
If you received unemployment compensation in the tax year, you should have a 1099-G form with an amount in box 1.
<u>Please note:</u>

If you received unemployment benefits, these are considered taxable income when you file your federal income tax return, but they are exempt from California state income tax. Read more on the IRS website <u>here</u> and on the CA EDD website <u>here</u>.

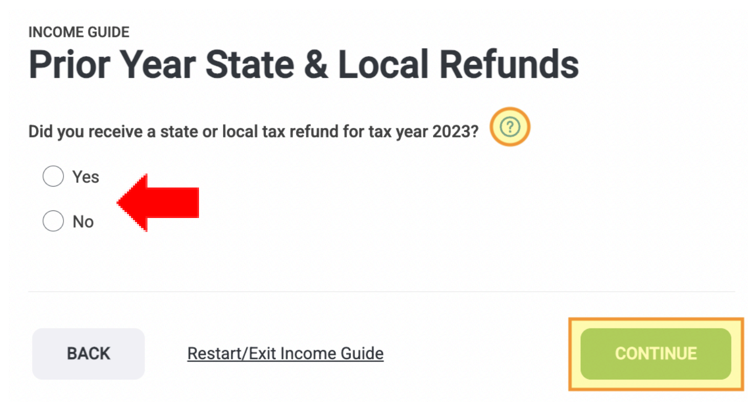
If this applies to you, click “Yes” and then click “CONTINUE”. In the next page, click “BEGIN” next to “Add or Edit a 1099-G” to begin entering information from your 1099-G form.
If you did <u>NOT</u> receive any unemployment compensation, click “No” then click “CONTINUE”.
</td>
<td>


</td>
</tr>
</table>

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

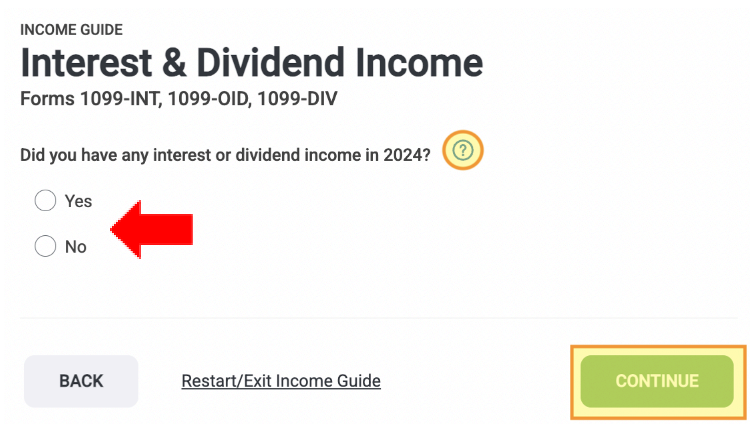
Please note:

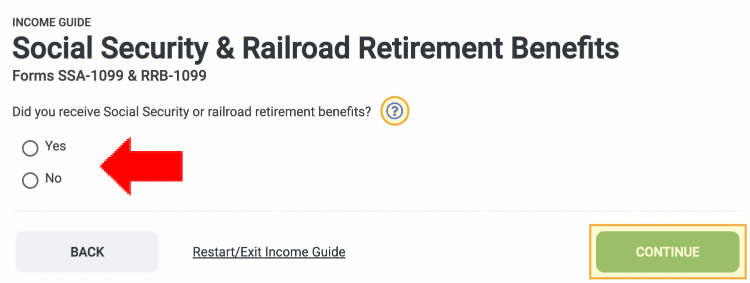
- Form 1099-G may arrive in the mail, or you may be able to print it from your state's website. The taxable income amount can be found in box 2 and is based on your standard or itemized deductions taken on last year's return.

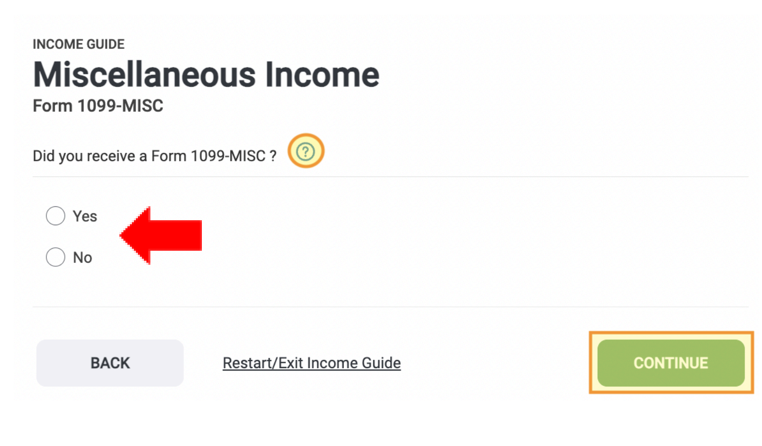
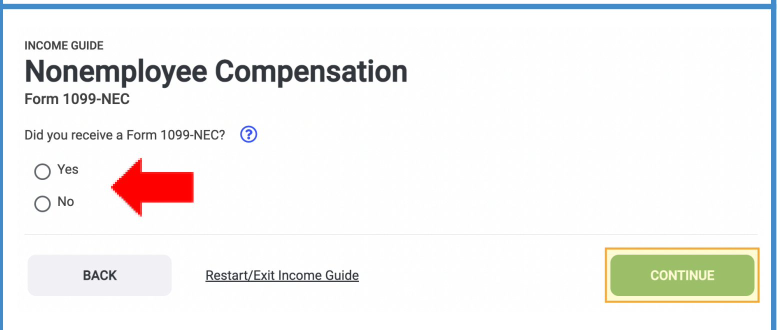
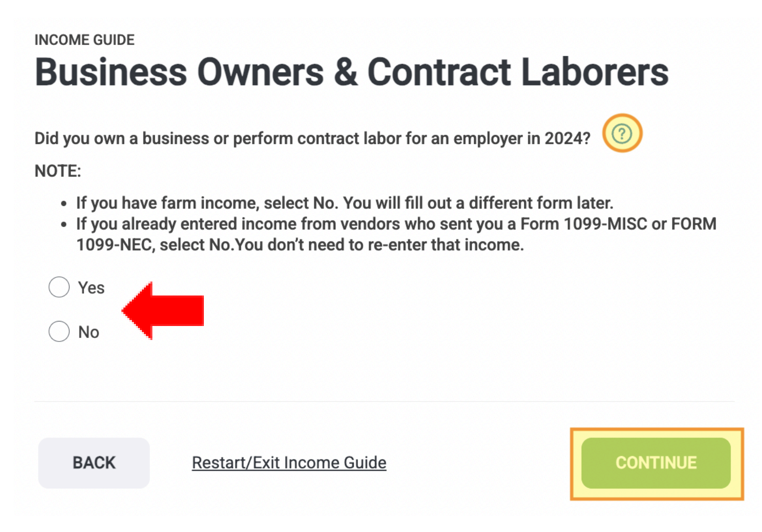


In the next sections, you will be asked about:

- 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)
  - For instance, if you received a distribution from your retirement plan in 2023 and elected to spread the distribution over three years. The election had to be made on your 2023 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**". **<u>Please note:</u>** • Click the question mark icon on any of these pages if you need additional information.	
If you worked as a contractor or gig worker or were self-employed, enter the information from your forms 1099-MISC or 1099-NEC. **<u>Please note:</u>** • Use [this spreadsheet] to add up your qualified business expenses.	
If you owned a business or performed contract labor for an employer, select **"Yes". ** If not, select **"No"** and then click "**CONTINUE**". **<u>Please note:</u>** • Click the question mark icon on any of these pages if you need additional information.	

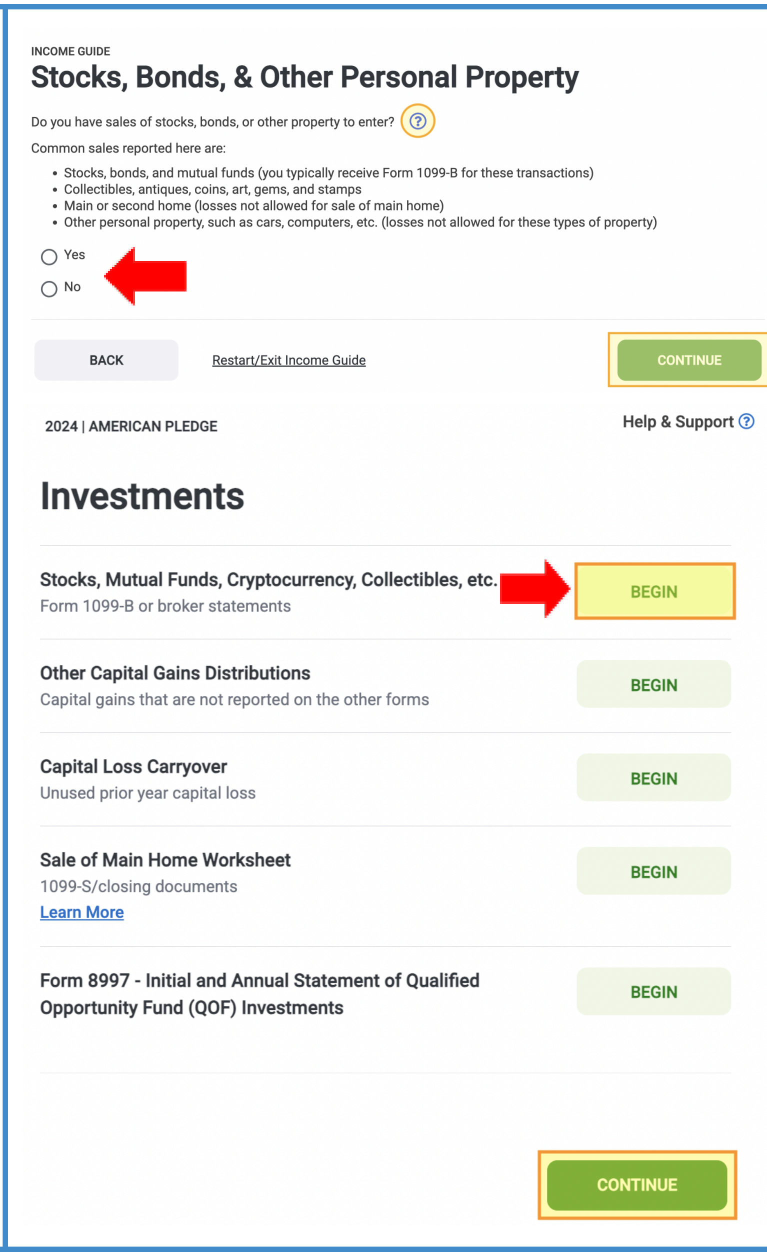
If you sold stocks, bonds or other property for personal purposes or investment (this does not include property sold that was used for your business; business property should be reported on Form 4797):

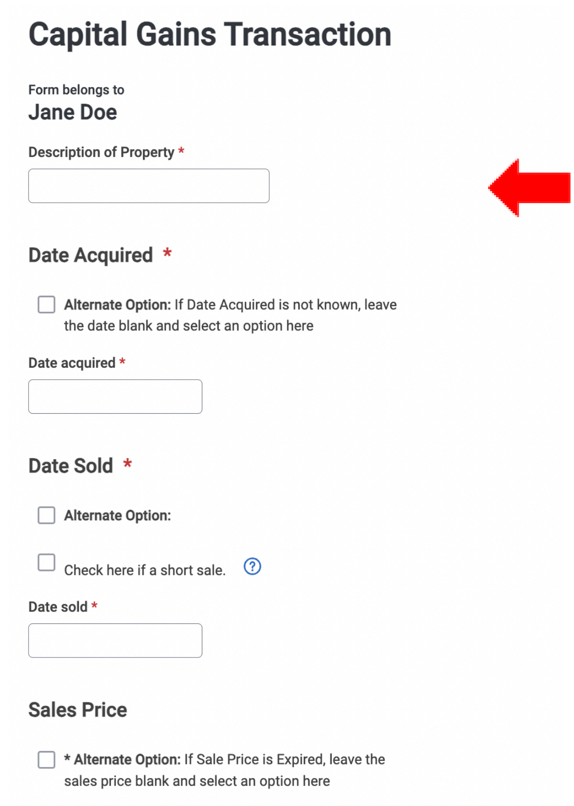
- Click **"Yes"** and then click **"CONTINUE"**.
- In the next page click **"BEGIN"** next to **"Stocks, Mutual Funds, Cryptocurrency, Collectibles, etc"**. Then enter information from your 1099 consolidated tax statement. Once you are done with that page, click **"CONTINUE"**.

<u>Please note:</u>

- 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. https://www.cointracker.io/

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

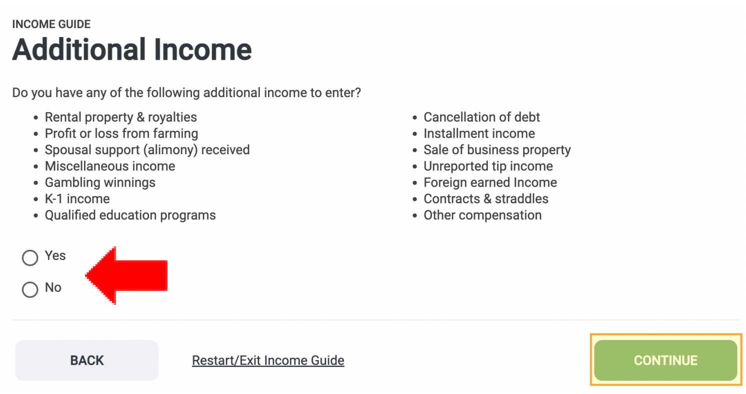
In this next section, if you have any income in the categories listed, click **"Yes"** and then click **"CONTINUE"**.

<u>Please note:</u>

- 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
- If you owned a farm or received a Form 1099-G with an amount in box 7



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

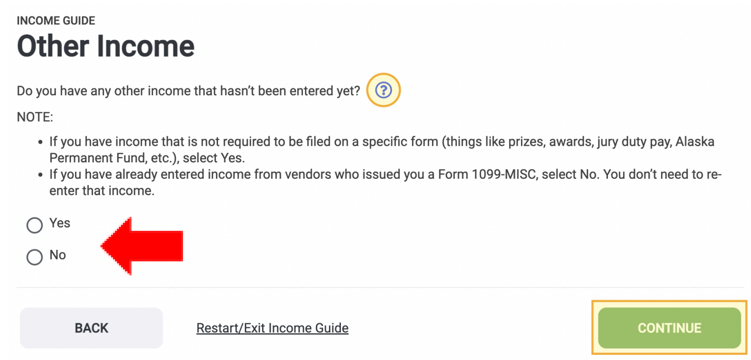
CONTINUE

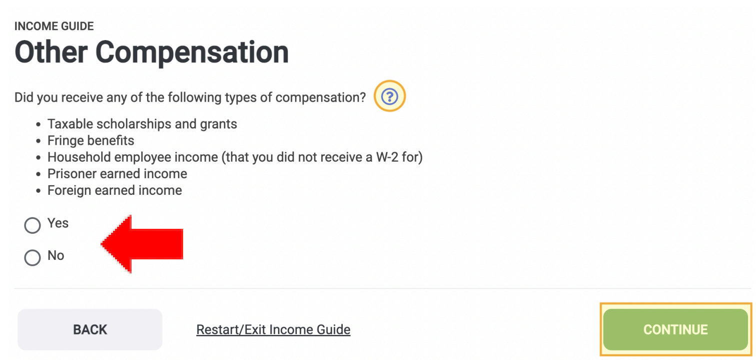
- If your divorce was finalized in 2022 or earlier, and you received spousal support
- Other income that hasn't been entered yet (things like prizes, awards, jury duty pay, Alaska Permanent Fund, etc.)
- Gambling Winnings
    - This includes winnings from lotteries, casinos, and raffles.
- Schedule K-1 (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"**.

<u>Please note:</u>

- Click the question mark icon for additional information.





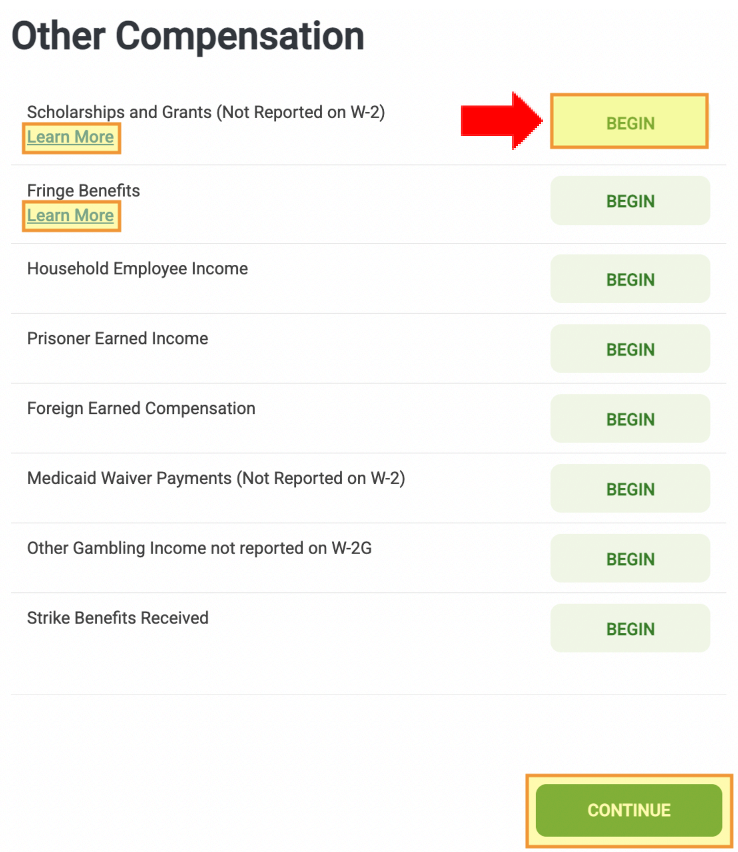
For college students:

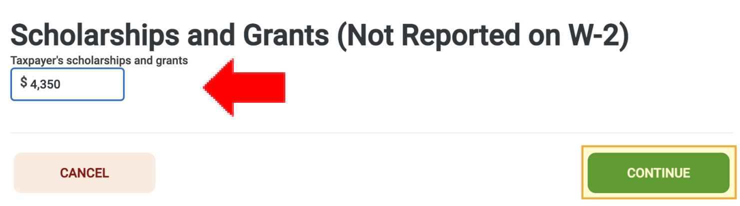
Your taxable scholarships and grants are usually reported to you on Form 1098-T in box 5. If you used all of your scholarships and grants for tuition and course-related expenses, this is **NOT** taxable income. You would only need to report an amount as taxable scholarships if you used it to pay for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

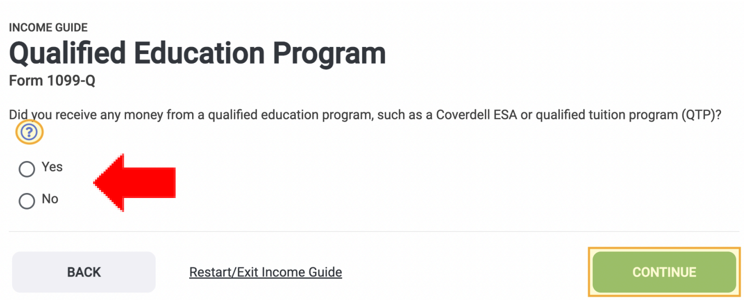




If you received money from a qualified education program, click **"Yes"** and enter your tax information from your 1099-Q. If not, click **"No"** and then **"CONTINUE"**.

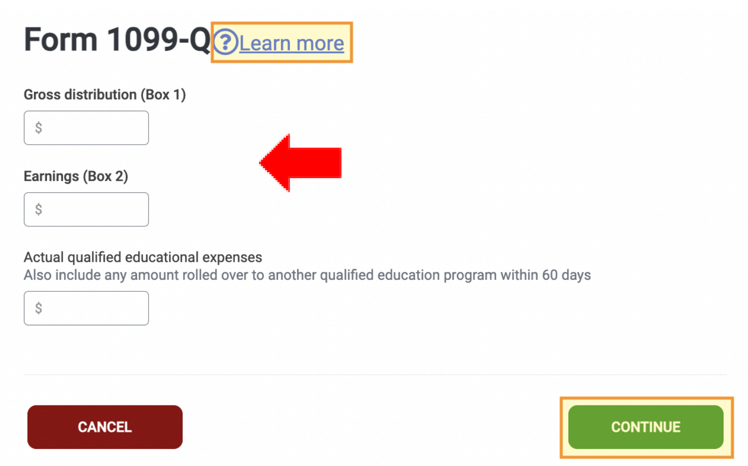
<u>Please note:</u>

- 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



<table>
<tr>
<td>
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 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?

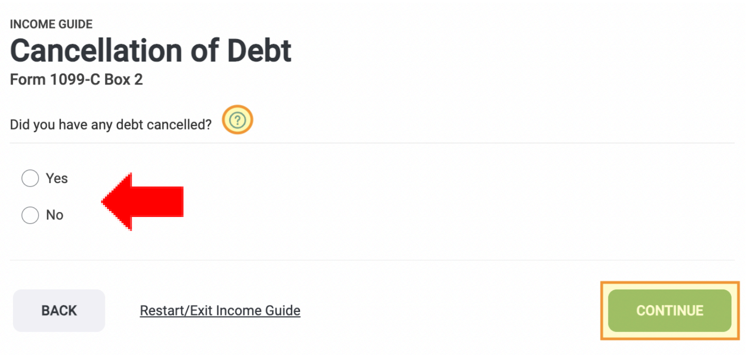
If the two amounts are equal, or if the amount of Qualifying Expenses is larger, your distribution is not taxable, and you don’t need to report this on your return. Retain the Form 1099-Q for your records.
If the amount in Box 1 is larger, A portion of the distribution is taxable. You will need to enter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

</td>
<td>


</td>
</tr>
<tr>
<td>
If you had any cancellation of debt, click “Yes”. If not, click “No” and then “CONTINUE”.

<u>Please note:</u>

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.

</td>
<td>


</td>
</tr>
</table>

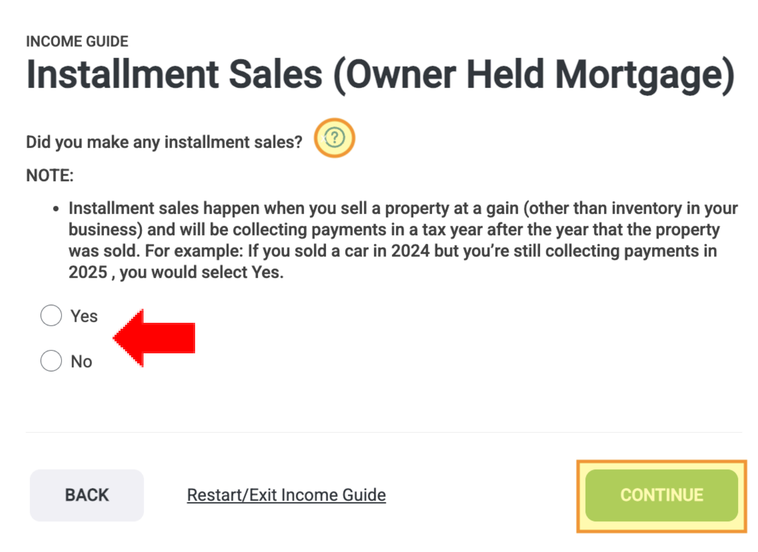
In the following pages, you will be asked you about:

- 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"**.

<u>Please note:</u>

- Click the question mark icon for additional information.



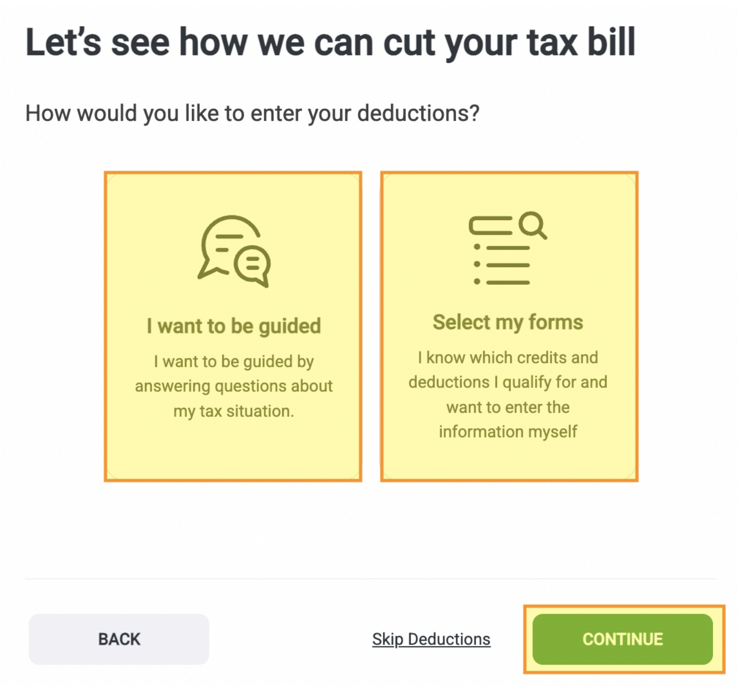
Step 5: Maximize your refund by entering in credits and deductions like donations to charity, school expenses, medical or service animal expenses, business expenses and more.

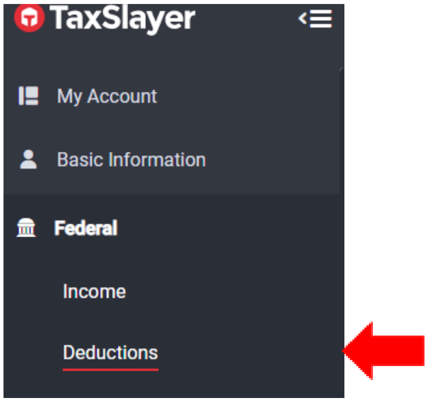
Deductions help reduce what you owe in taxes, and some provide you with a cash back refund.

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

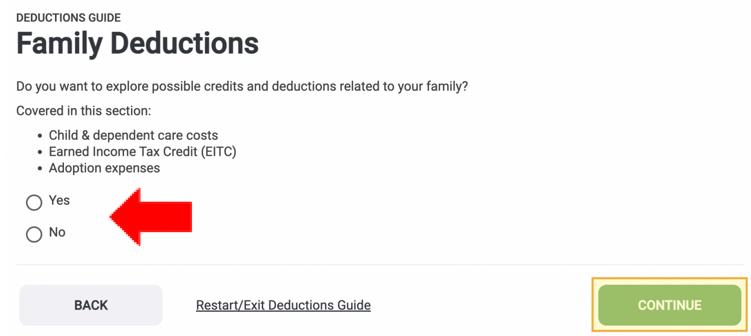
Please note:

- 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.





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

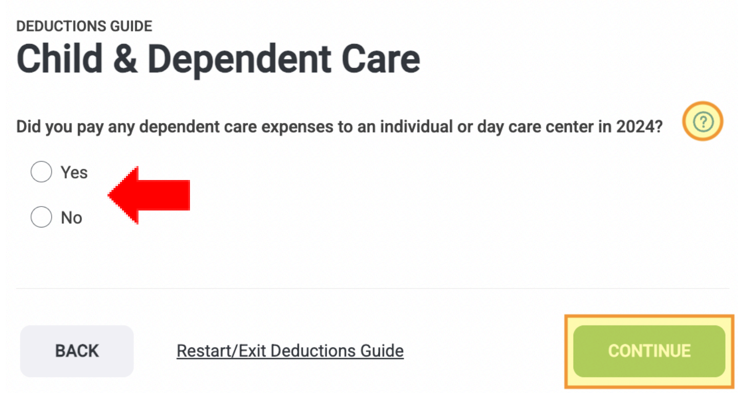


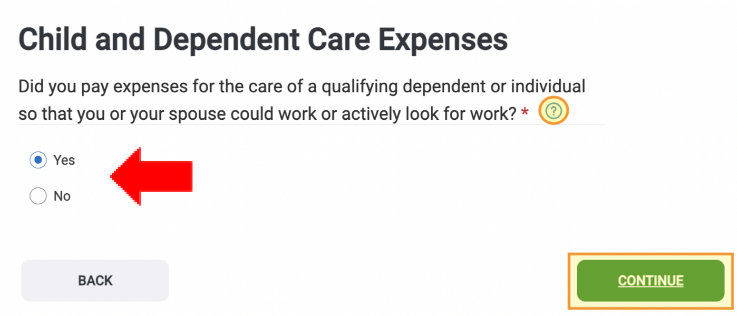
If you paid for child care or the care of a dependent out of your own pocket to be able to work or actively look for work, click **"Yes"** and then **"CONTINUE"**. If not, click **"No"** and then click **"CONTINUE"**.

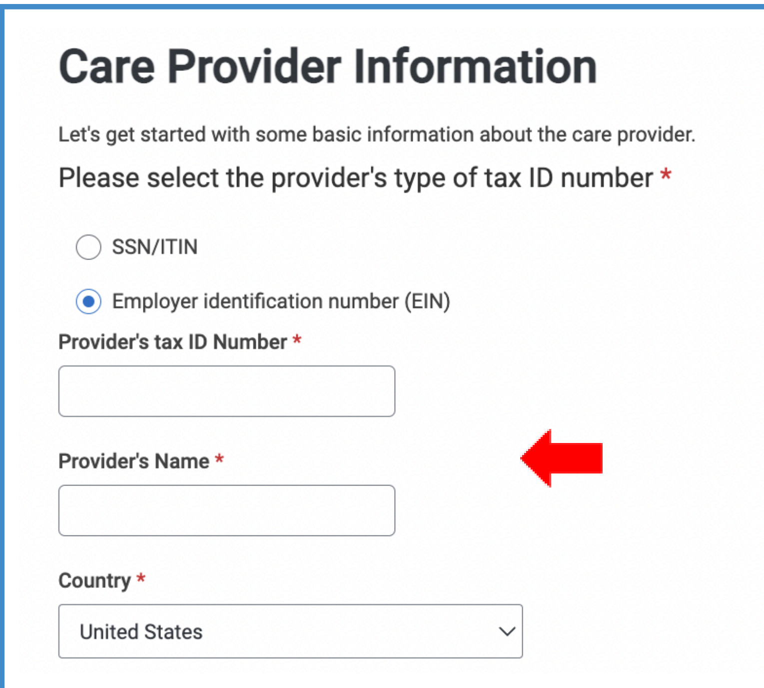
Please Note:

- 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.
- The credit is calculated based on your income and a percentage of the expenses you incur for the care of a qualifying individual, in order to enable you to work, look for work, or attend school. Check [here]() to see if you are eligible to claim the credit.

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.



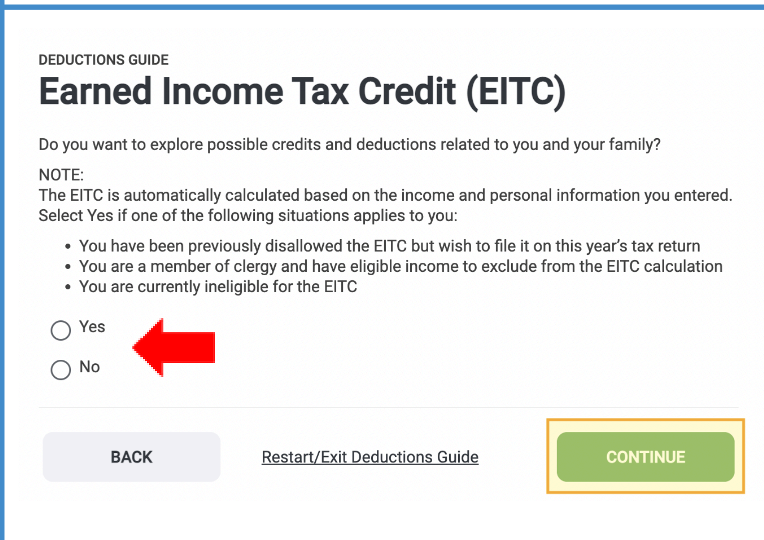




The EITC is automatically calculated based on the income and personal information you entered. You **DO NOT** need to fill this section out **UNLESS** one of the following situations applies to you:

- 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

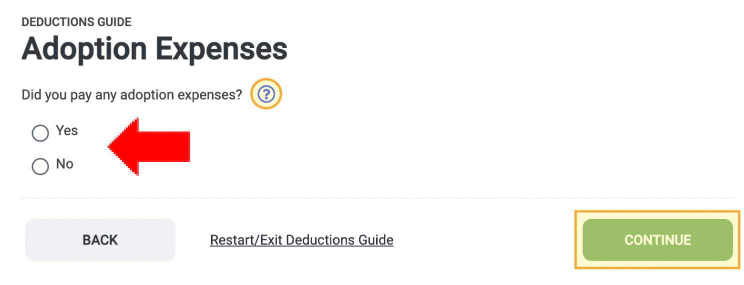
If one of these situations apply to you, then click **"Yes"**. If not, click **"No"** and then **"CONTINUE"**.



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 the current year. However, you can also claim this credit if you paid expenses in the prior year for an adoption that didn't become final until the current year.

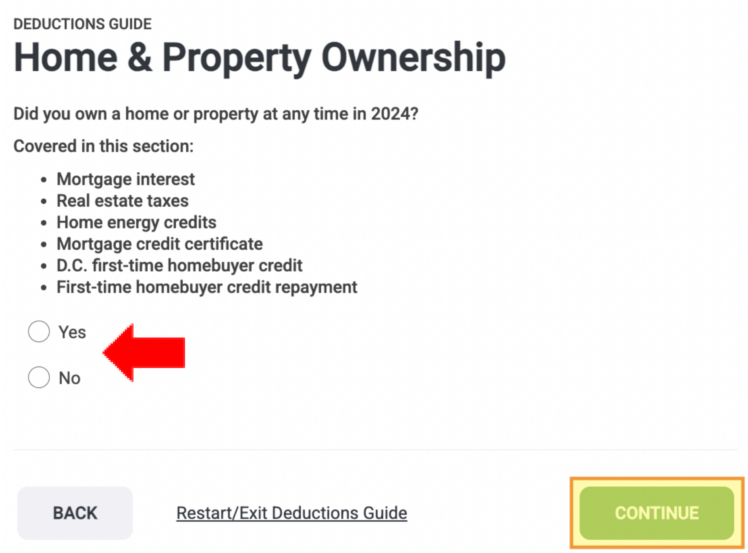


Did you own a home or property at any time in the current year? Select **"Yes"** or **"No"**.

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

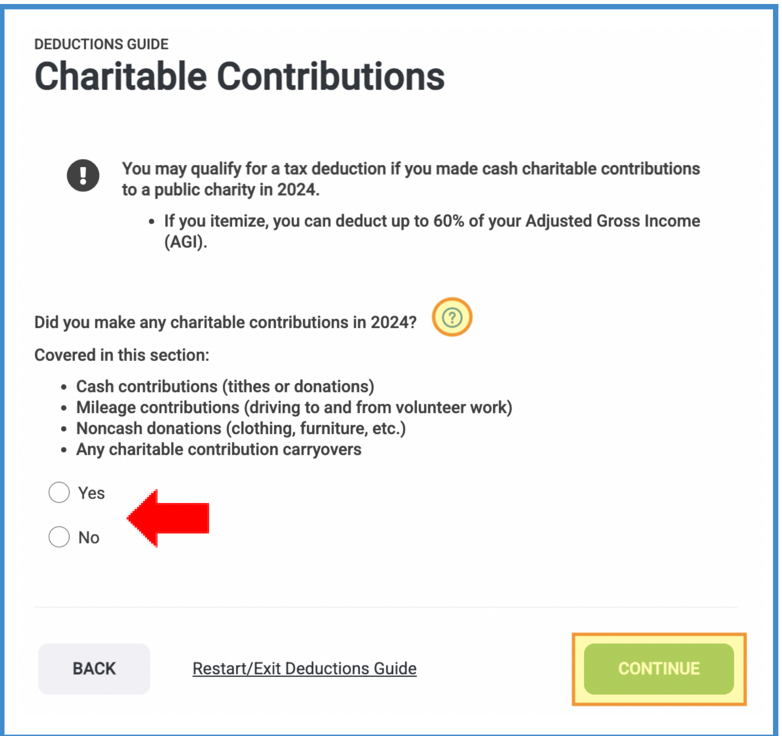
In each of these sections, you will indicate **"Yes"** or **"No"** and then click "**CONTINUE**".



Charitable Contributions made within the year can be included as an itemized deduction. If your itemized deductions ***do not*** surpass your standard deduction, the refund will not be impacted.

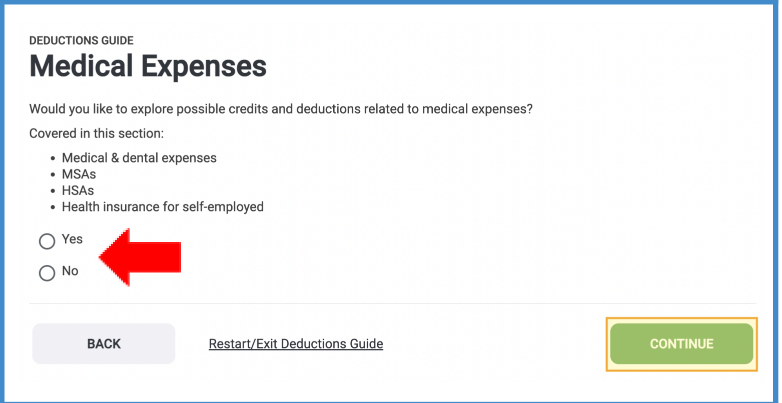
Please note:

- 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.
- More information on qualified contributions can be found in Publication 526.



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

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

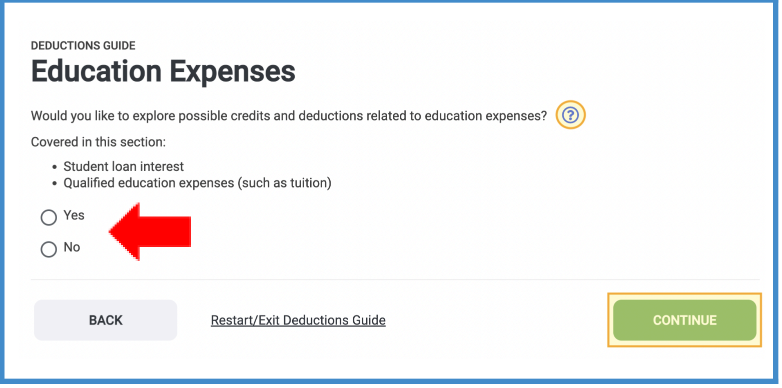


Did you pay for tuition, books, fees, and school supplies for higher education or career training? In this next section, check out credits and deductions specific to college students.

Please note:

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

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

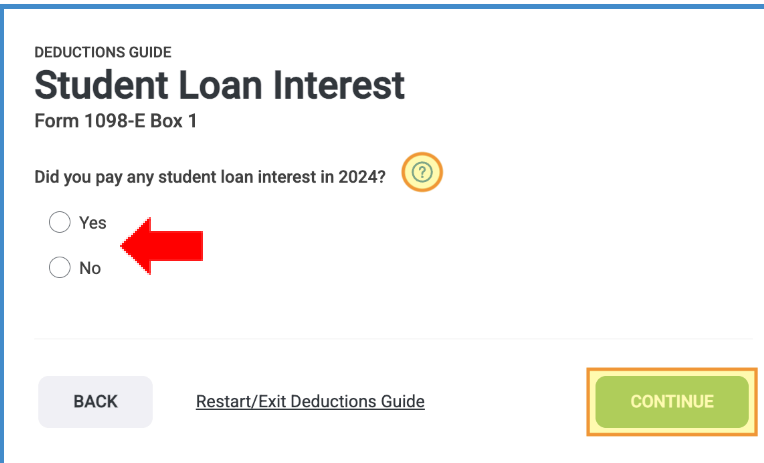


If you paid any student loan interest within the year, click **"Yes"** that you paid qualifying education expenses.

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.

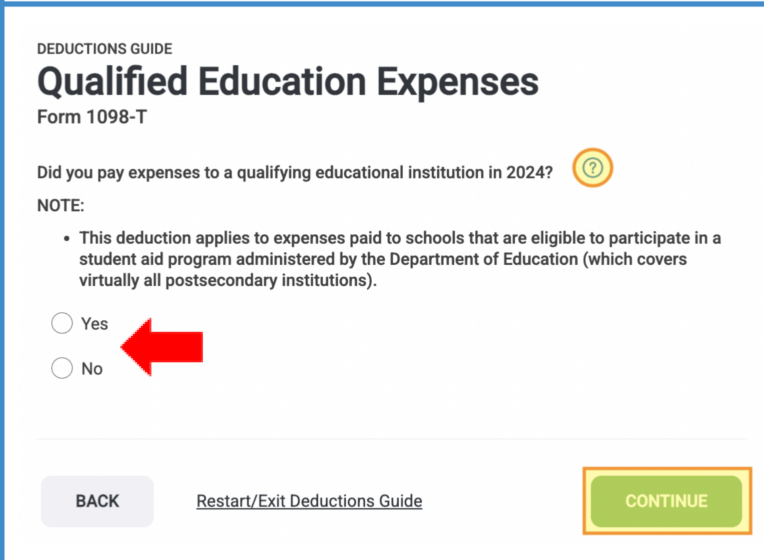
Click **"CONTINUE"**. In the next page, you will input the total interest paid on qualified student loans.



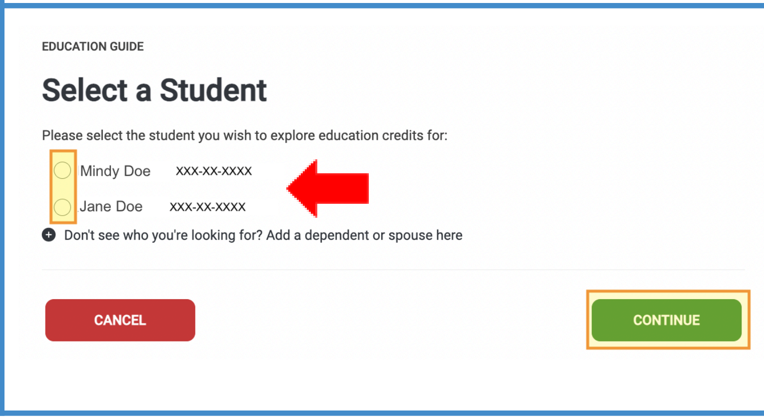
Click **"YES"** that you paid qualifying education expenses. Click **"CONTINUE"**.

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.



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

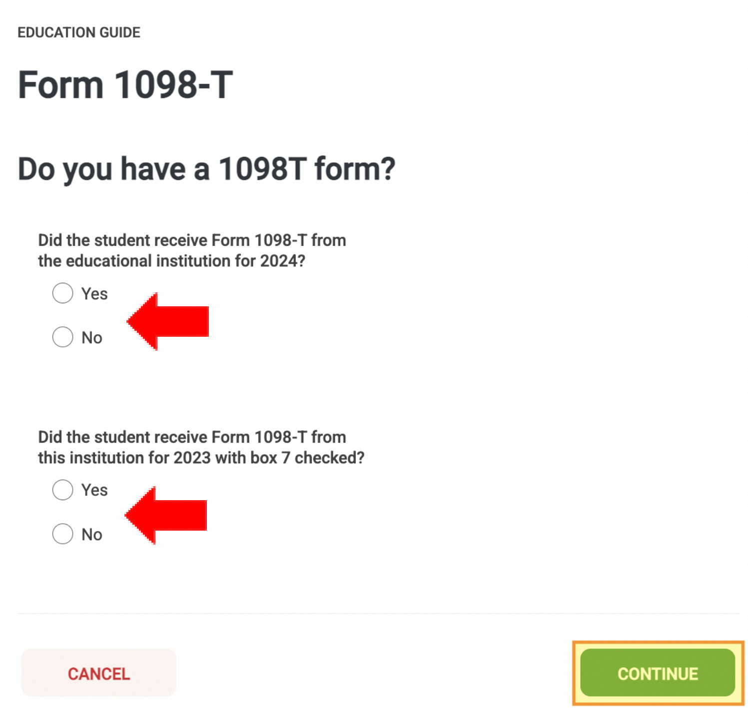


Answer the questions about your 1098-T form.

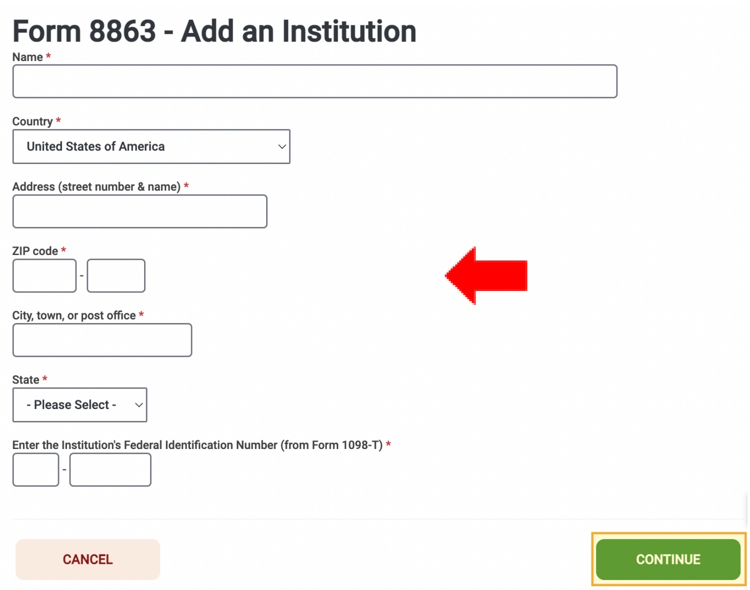
<u>Please note:</u>

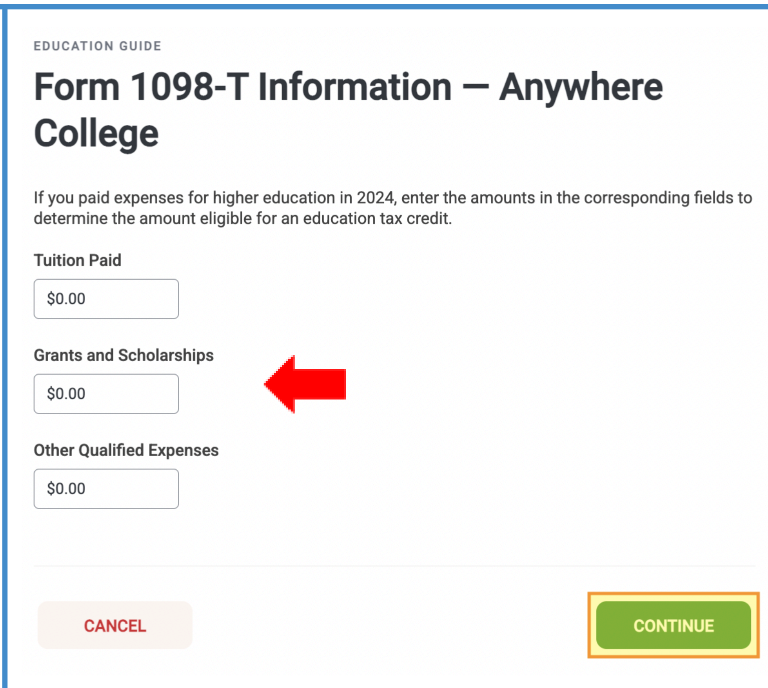
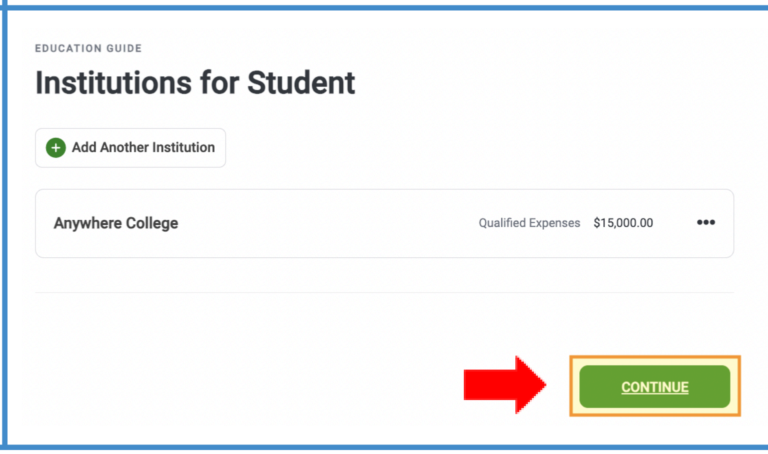
- If you do not have the form, you can request it from your educational institution.

Click **"CONTINUE"**.



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



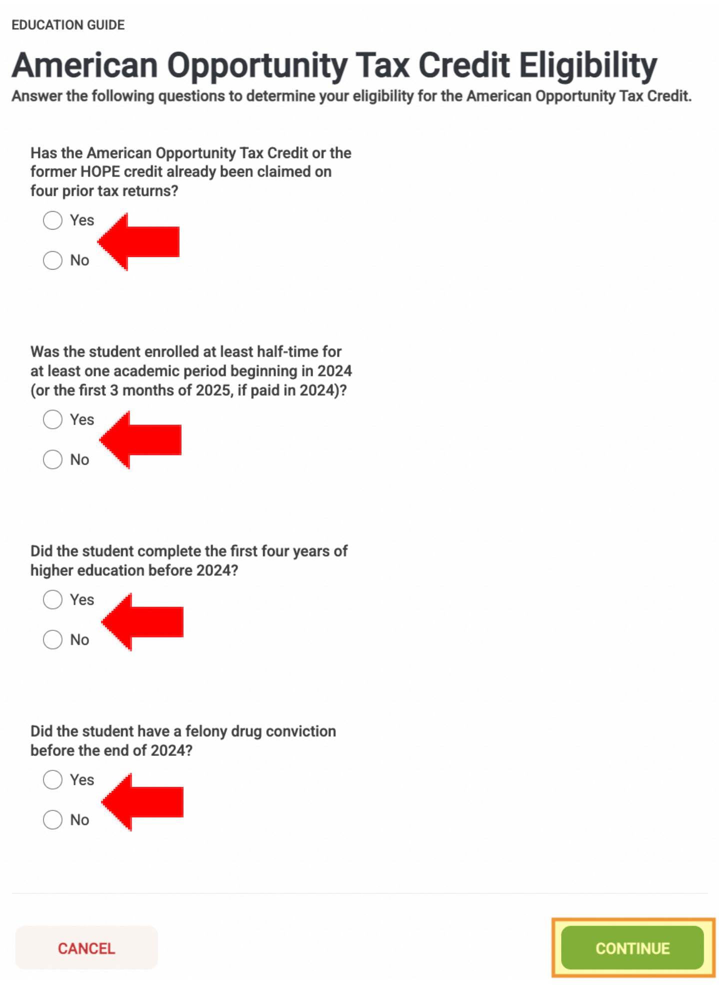
<table>
<tr>
<td>Enter any tuition paid, grants and other qualified expenses. Click “CONTINUE”.</td>
<td>
</td>
</tr>
<tr>
<td>Click “CONTINUE”.</td>
<td>
</td>
</tr>
</table>

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

<u>Please note:</u>

- 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 may change year to year and are also based on filing status. Check this [IRS page] to view the current amount
  - 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"**.

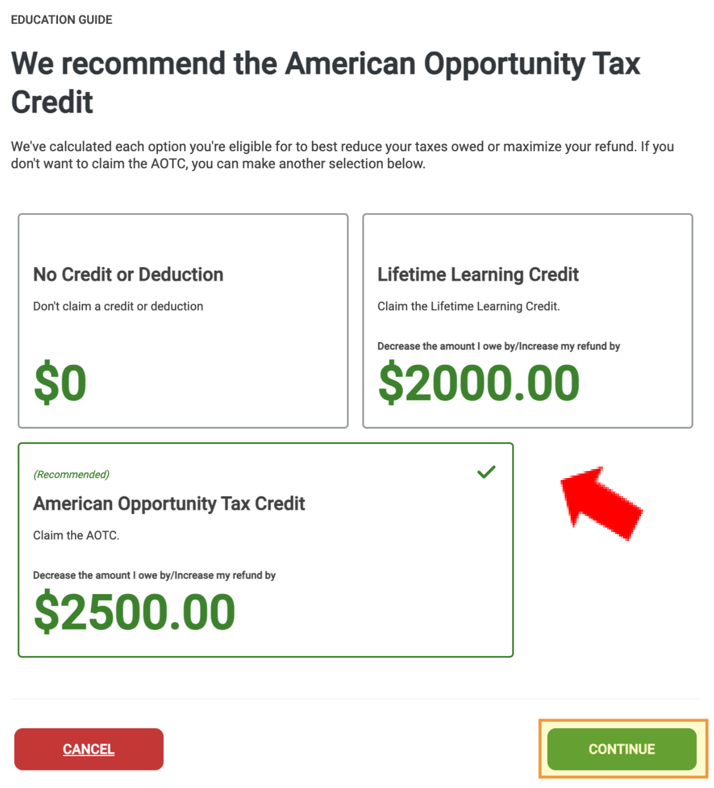


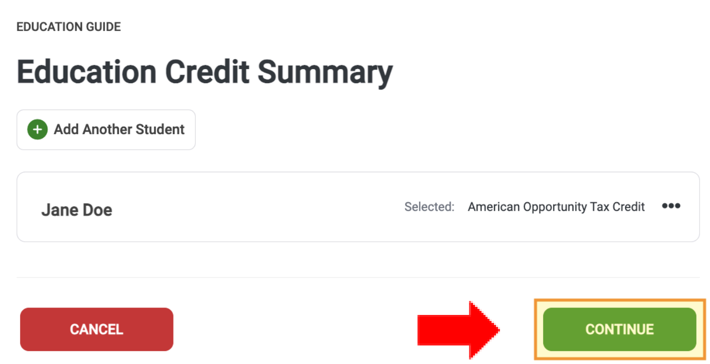
<table>
<tr>
<td>
If you qualify for the AOTC, click “CONTINUE”. If you believe this is incorrect and believe you should receive the LLC, click “Lifetime Learning Credit” then click “CONTINUE”

<u>Please note:</u>

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: Check this <u>IRS page</u> to view your income limit based on filing status
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

</td>
<td>


</td>
</tr>
<tr>
<td>Click “CONTINUE”.</td>
<td>


</td>
</tr>
</table>

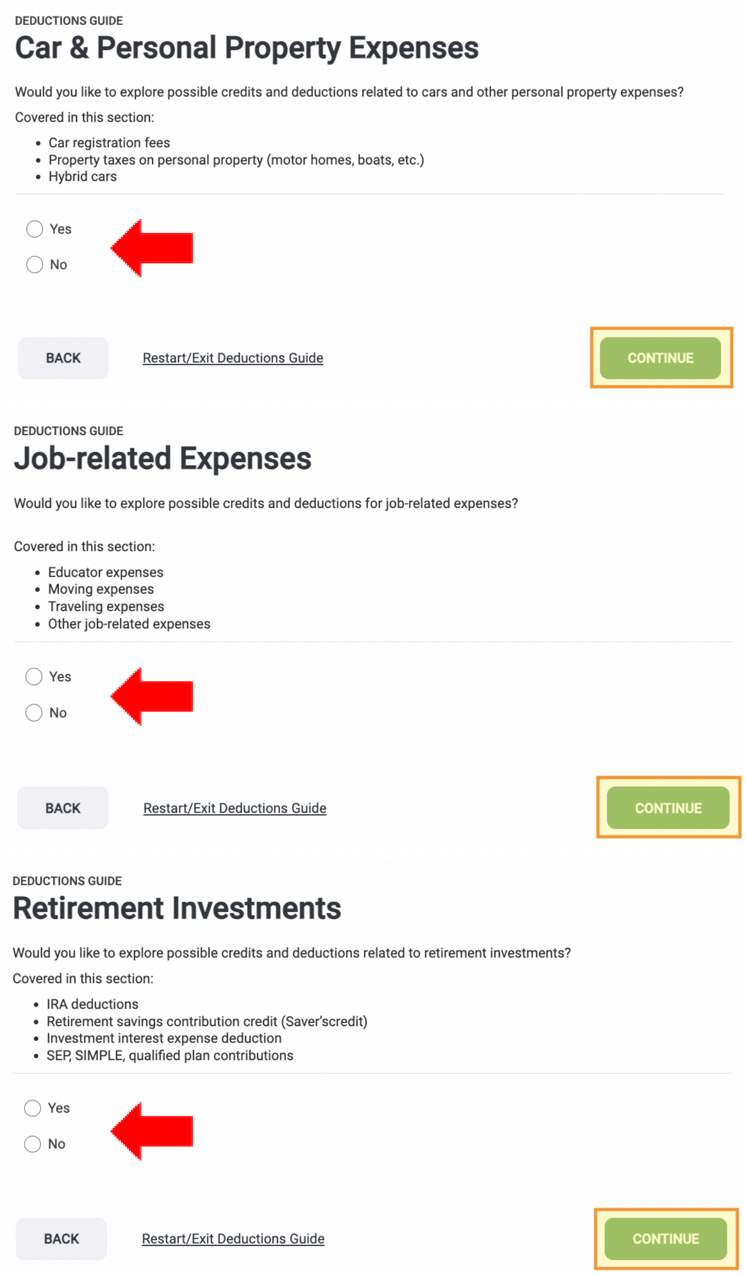
In the next sections, deductions will be covered under the following categories:

- 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

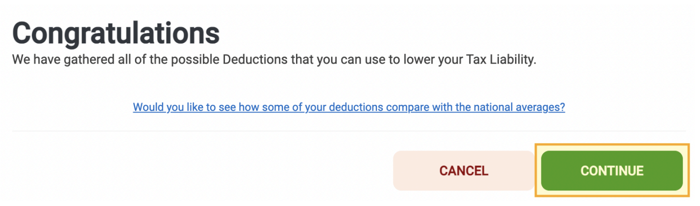
In each of these sections, you will indicate **"Yes"** or **"No"** and then click "**CONTINUE**".

<u>Please note:</u>

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



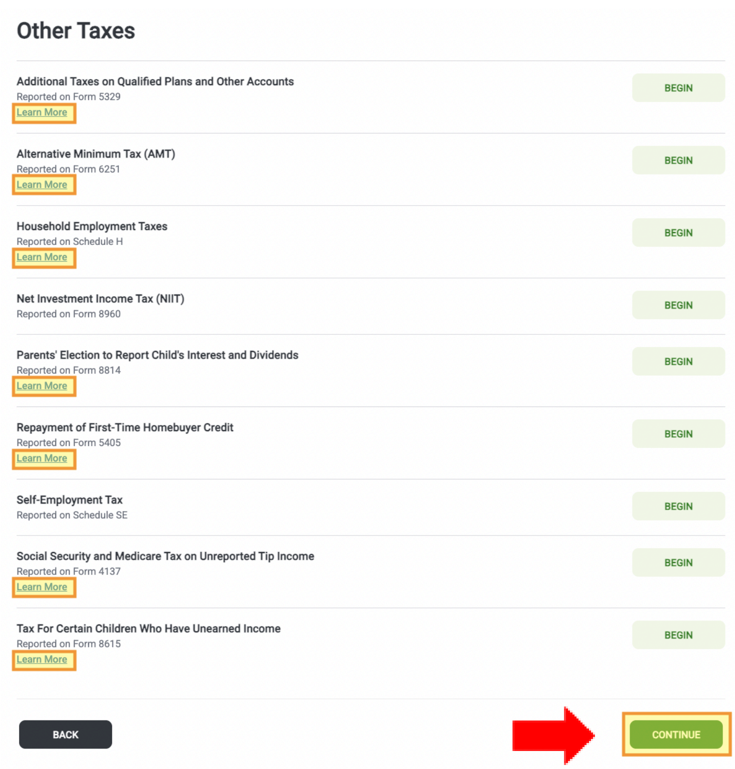
Click “**CONTINUE**”.



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**”.

<u>Please note:</u>

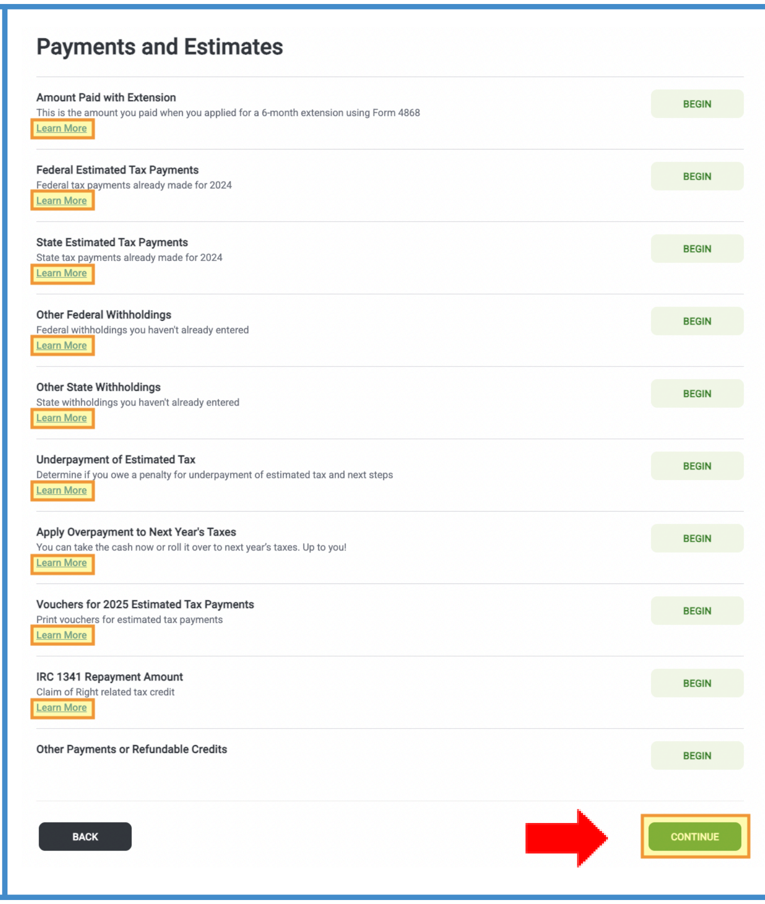
- Click the **“Learn More”** icons if you need additional information.



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**".

<u>Please note:</u>

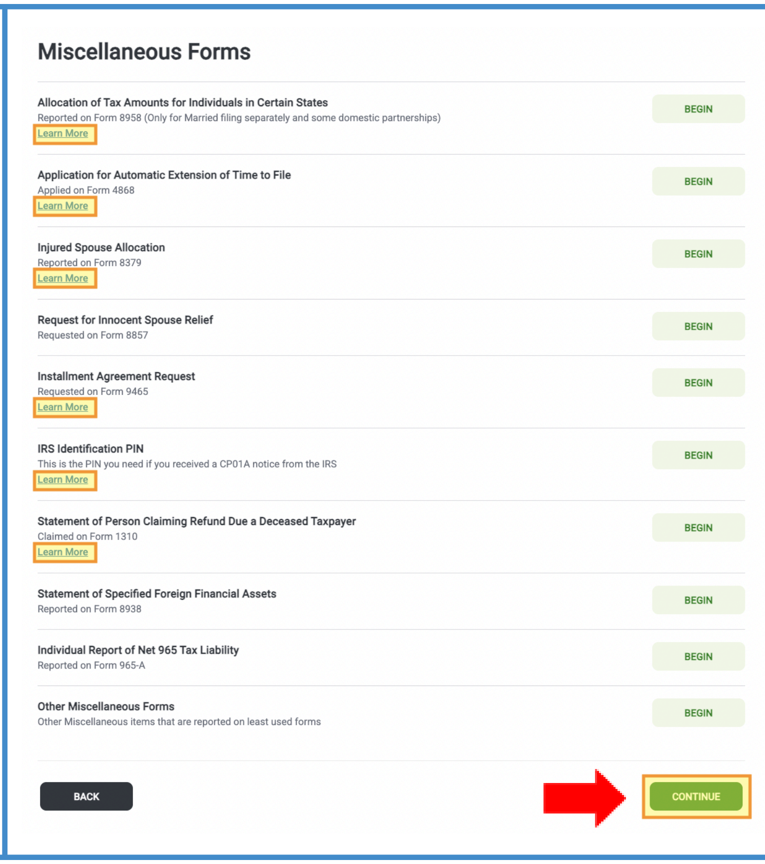
- Click the **"Learn More"** icons if you need additional information.



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 **"Learn More"** icons if you need additional information.

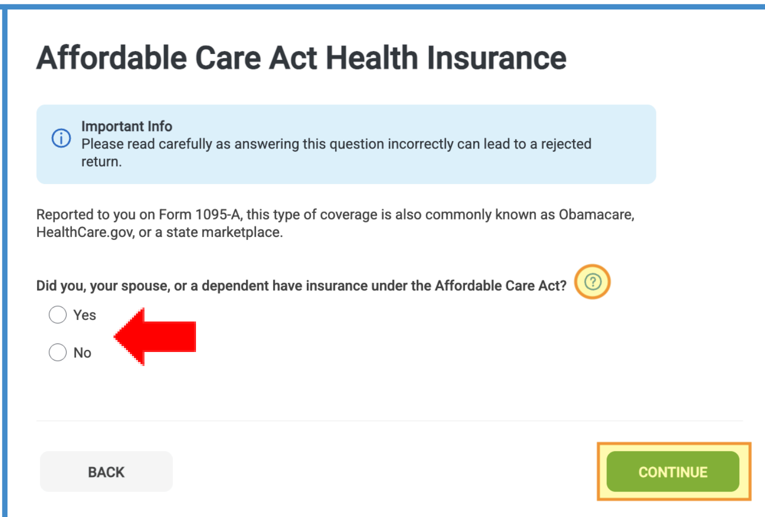


Step 6: Answer the Health Insurance - Affordable Care Act (ACA) Insurance Plan Question

To answer the ACA Question:

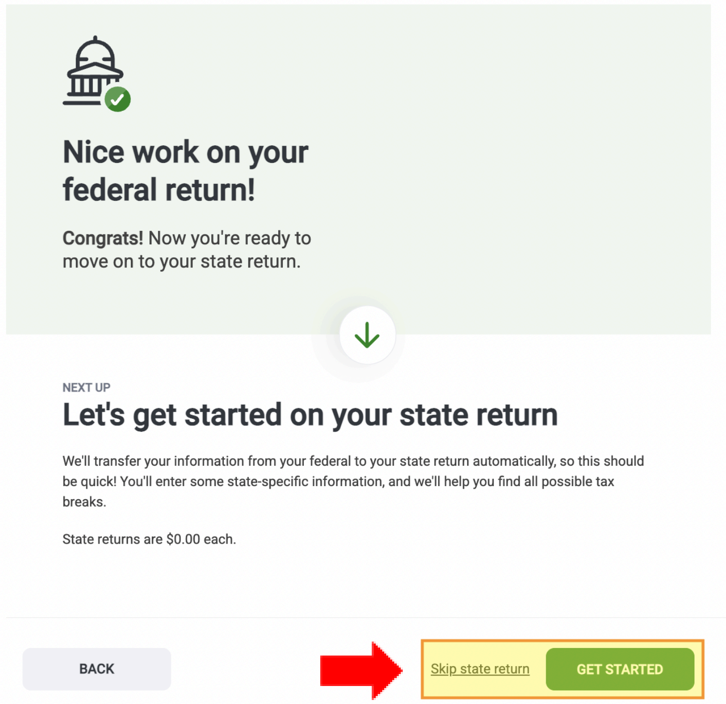
- Click **"No"** if you have full-scope Medi-Cal coverage or have insurance through your employer.
- Click "**Yes**" if you paid for health insurance using Covered California.

Click **"CONTINUE"**.



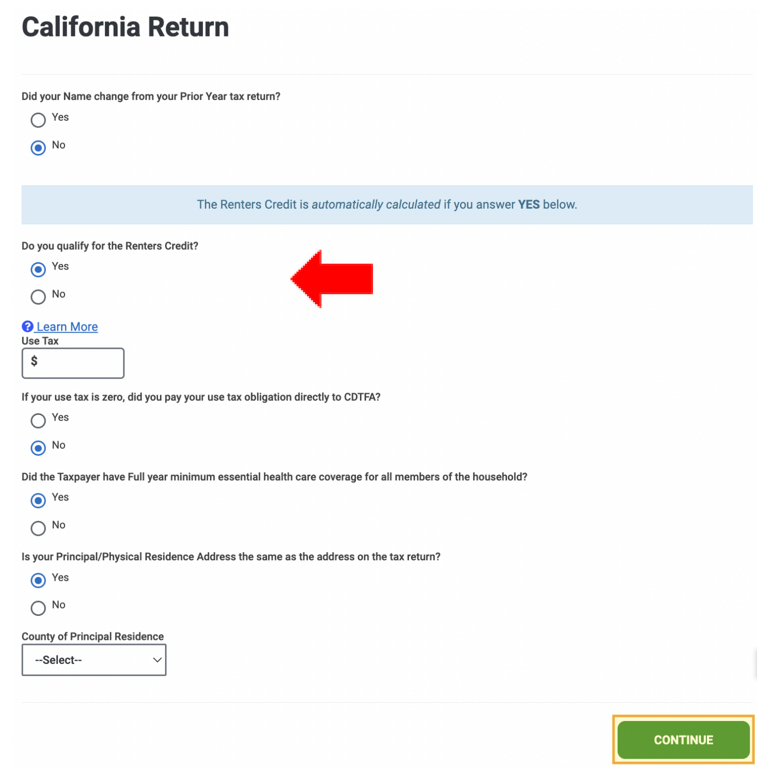
Step 7: Prepare your California State Tax Return

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".**



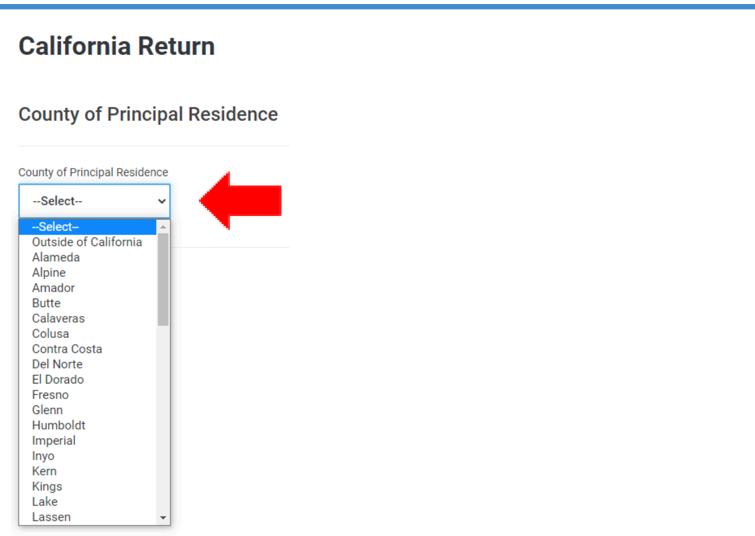
CA Renter's Credit:

- 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"**.



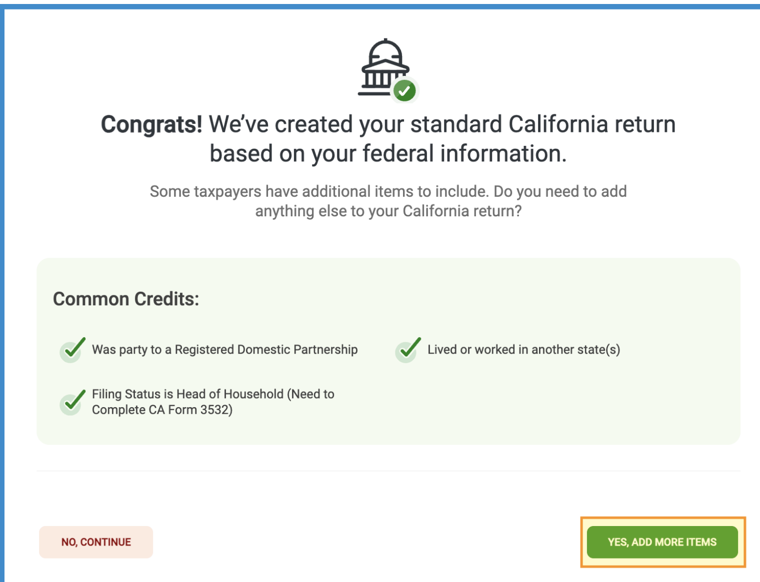
Select the county where you live from the drop-down menu.

Click **"CONTINUE"**.

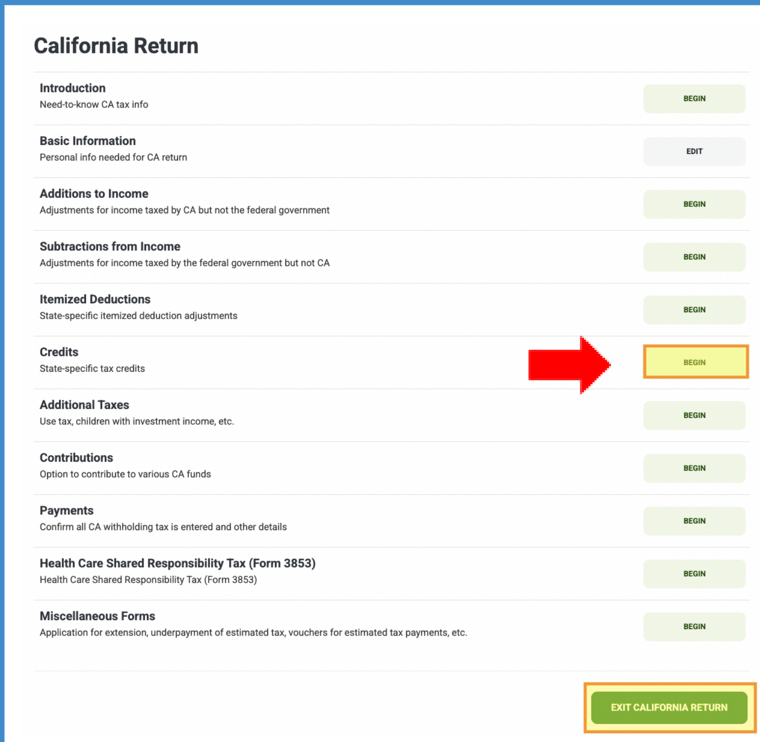


Wait! You are not done with the California return yet!

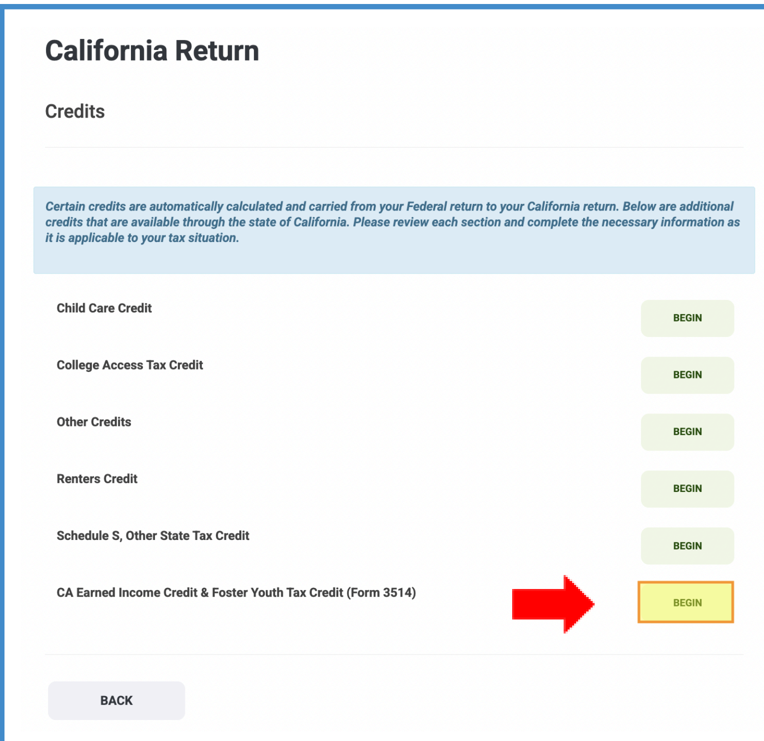
Click **"YES"** to go to the main California Return page and make sure you don't miss out on any CA state-specific tax credits you are eligible for.



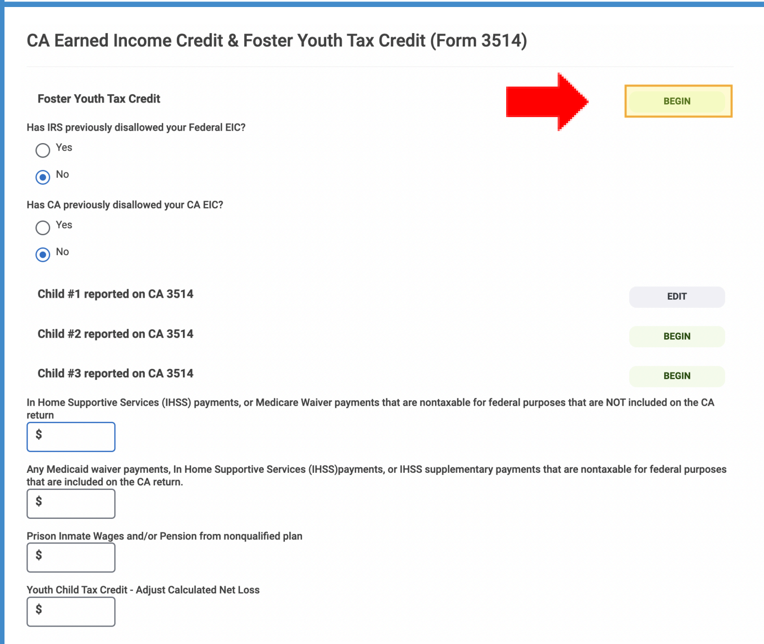
California Return: Click **"BEGIN"** on the "**Credits**" section to claim CA state credits.



To claim the Foster Youth Tax Credit, click **“BEGIN”** on the “**CA Earned Income Credit & Foster Youth Tax Credit”** category.

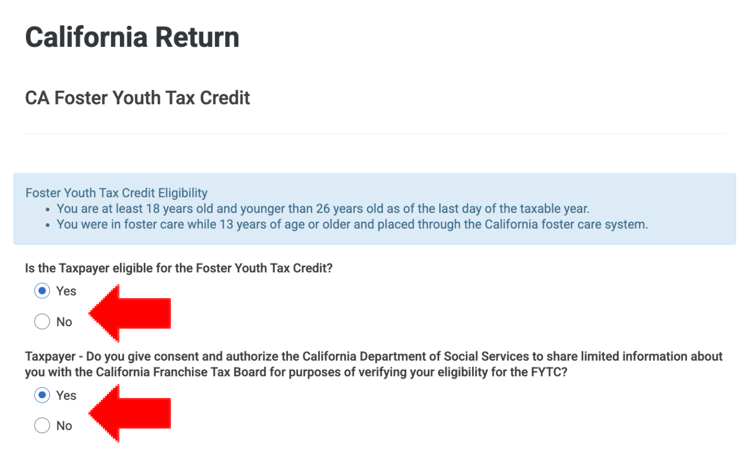


On the upper right-hand corner of the page, next to where it says “Foster Youth Tax Credit”, click **“BEGIN”** to go to the main Foster Care Tax Credit page.



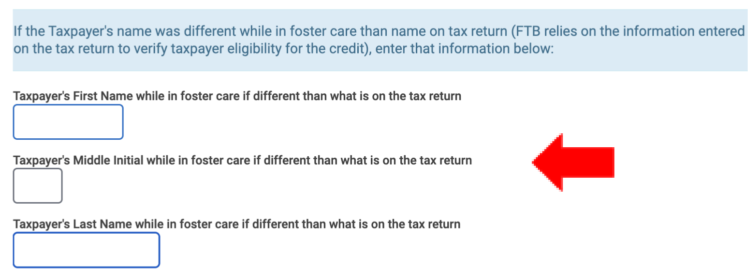
Click **"Yes"**, that you are eligible for the Foster Youth Tax Credit.

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



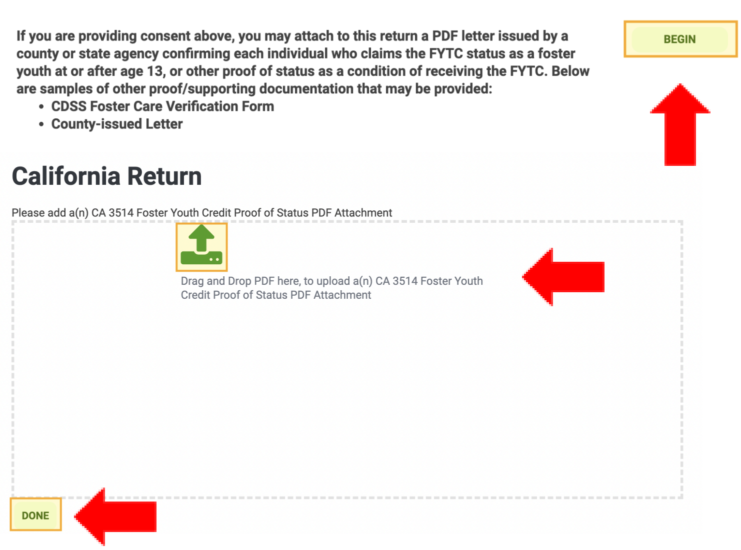
If your name changed since you were in foster care, type in your first, middle initial, and last name while in foster care. This is so you can be verified correctly.

Otherwise, leave it blank.



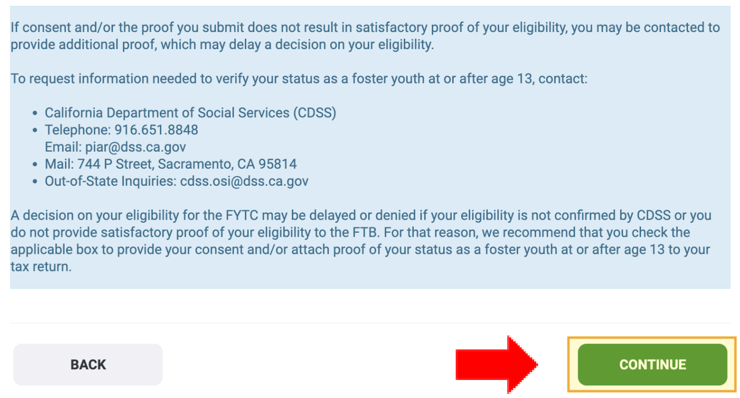
If you have proof of foster care (verification letter or ward of the court letter), click **"BEGIN".**

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



Please note:

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

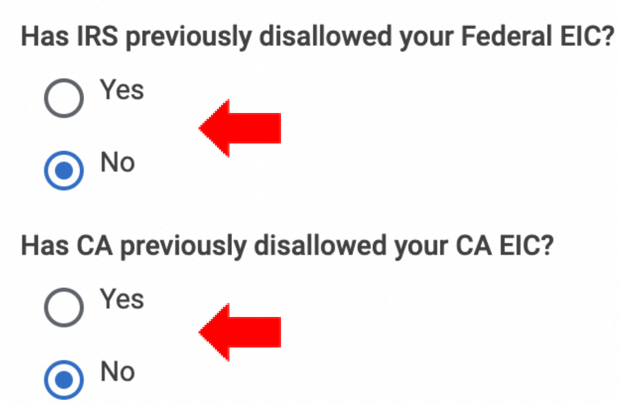


Click **"NO"** or **"YES"** to "Has the IRS previously disallowed your Federal EIC"?
Click **"NO"** or **"YES"** in response to "Has CA previously disallowed your CA EIC?"

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

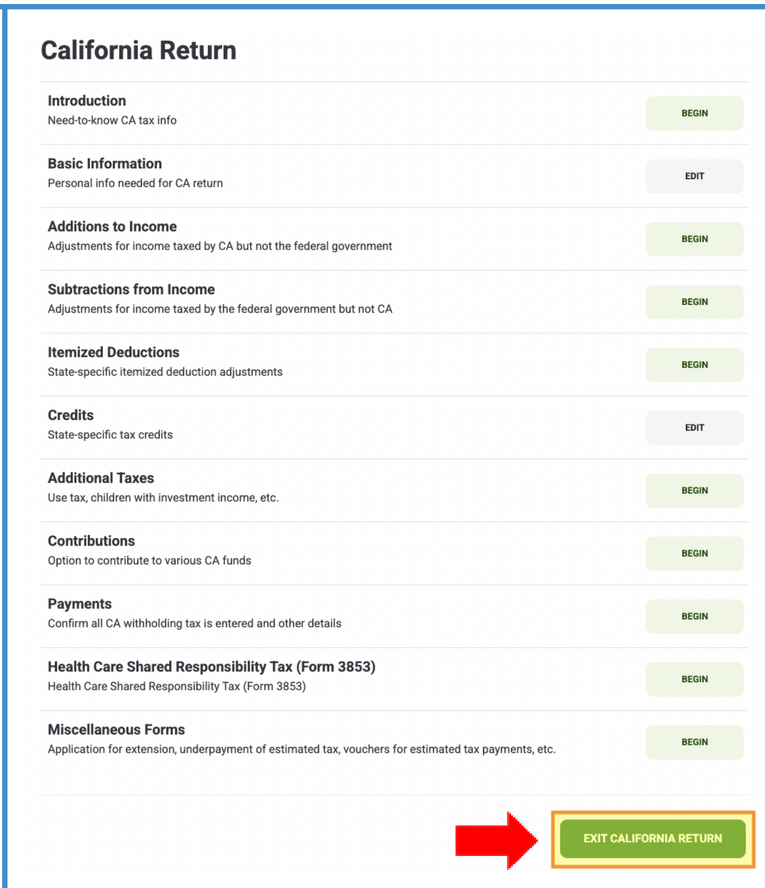
Click **"CONTINUE"**.

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"**.

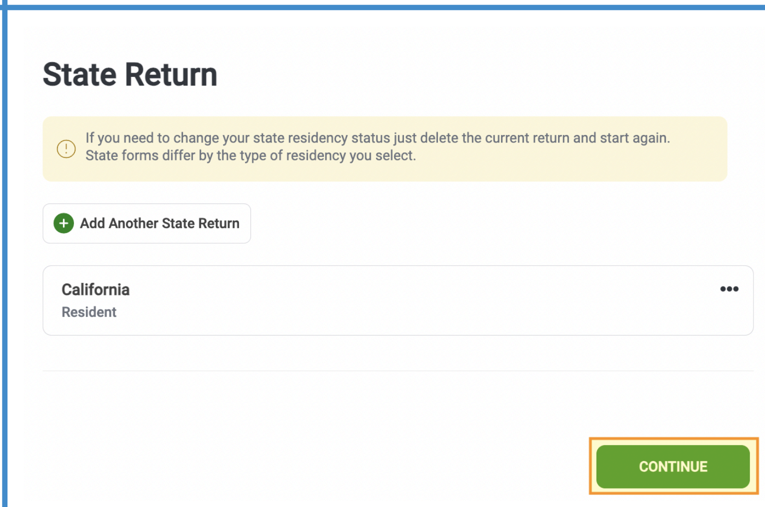


Make sure to enter any additional information that may apply to your personal circumstances on your State Return.

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



Click **"CONTINUE"**.

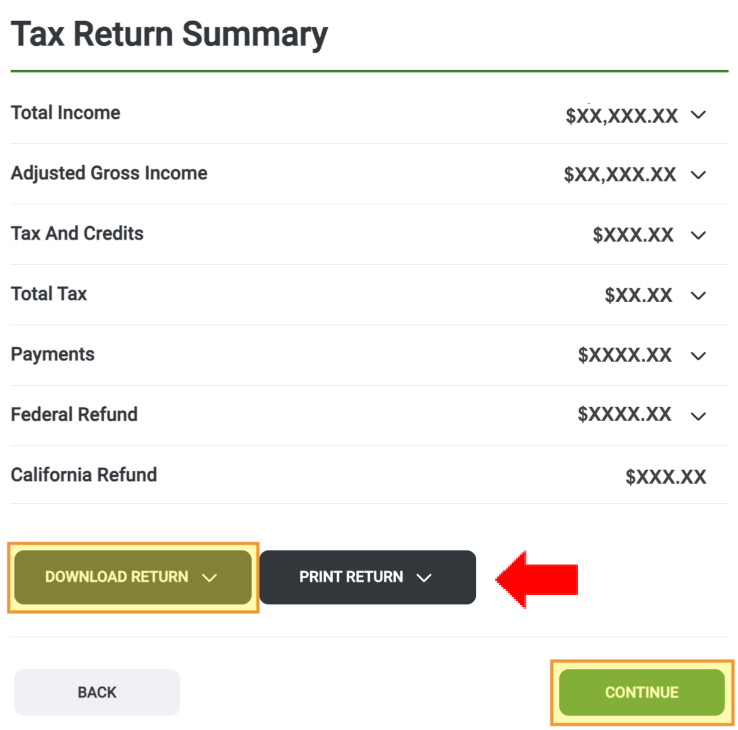


Make sure to double-check that any credits you were eligible for are reflected in the summary (e.g. Earned Income Tax Credit, Child Tax Credit, Education Credits, CalEITC, Young Child Tax Credit, Foster Youth Tax Credit, Renters Credit, etc.)

Please note:

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

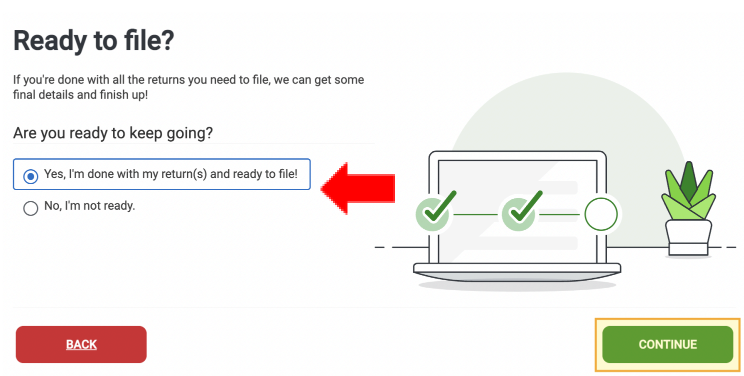
If everything looks okay, then click **"CONTINUE"**.



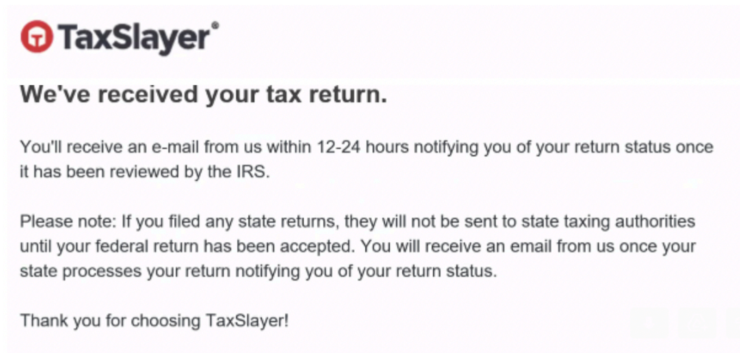
File Your Return. Click **"Yes, I'm done with my return(s) and ready to file!"**.

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. Your return will be rejected if your AGI is not included.

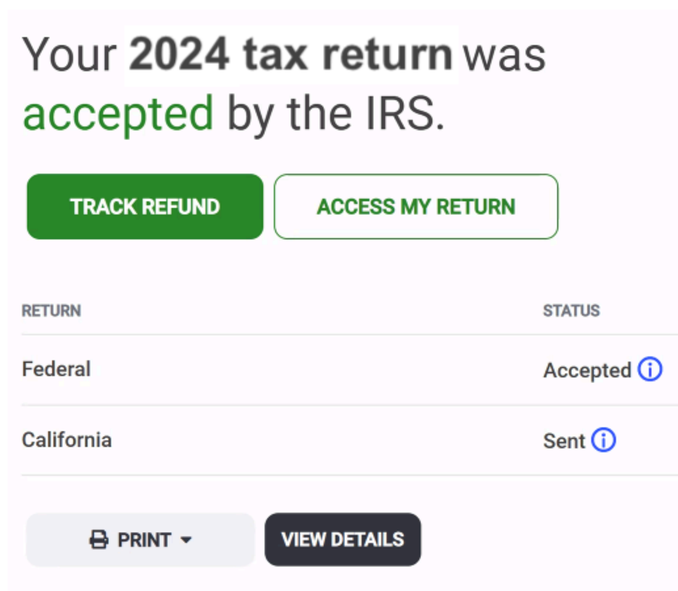


When your federal and/or state return(s) have been processed, ***an automatic notification is sent to the e-mail address*** associated with your account as well as to the mailbox within your account located in the navigation menu on the left side of the screen. ***If you did not receive the email notification***,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



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.

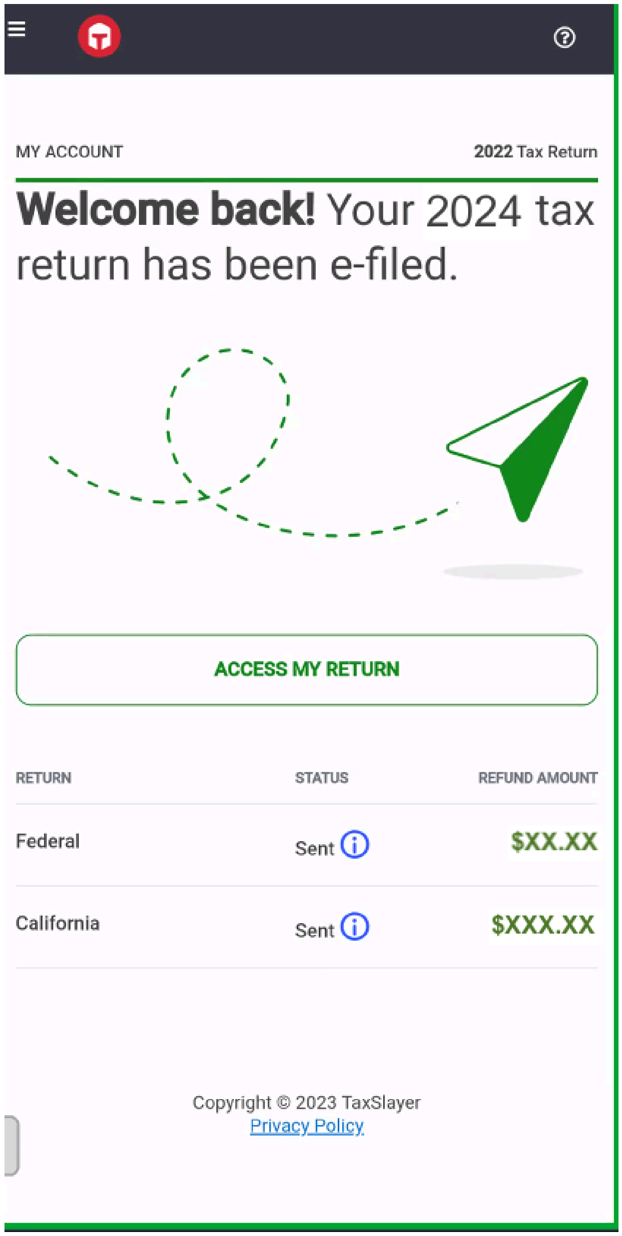


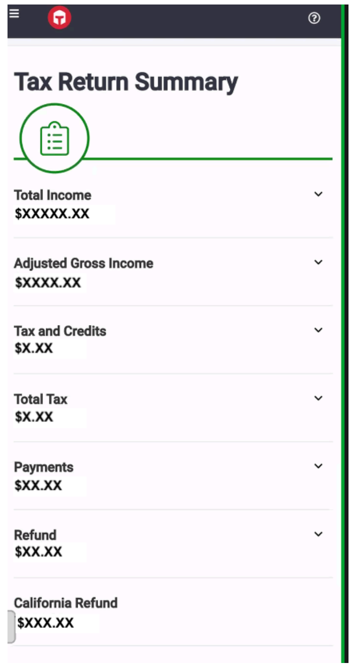
Print your return

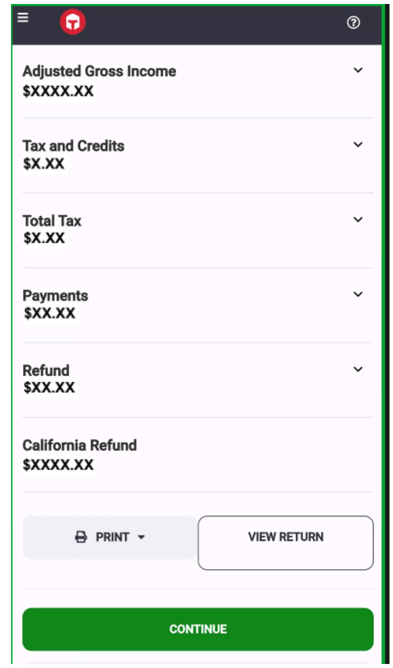
Once your Federal and/or state return(s) have been accepted, you will be able to log in to your account from the TaxSlayer **homepage** and access your accepted Federal and/state return(s) directly from the **"My Account"** screen. You will click on **"Access My Return"**.

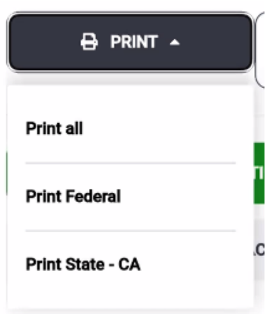
<u>**Please note:**</u>

- 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.

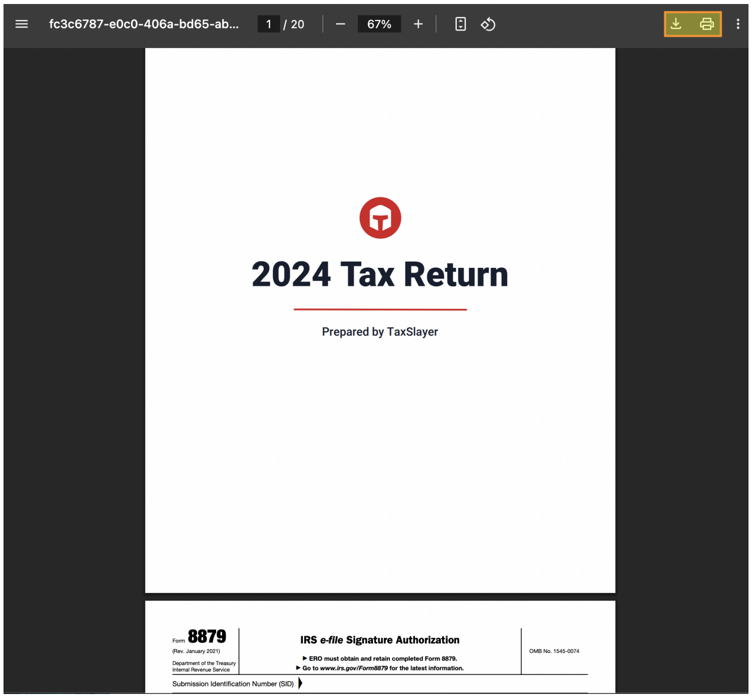


<table>
<tr>
<td>Click on the toolbar on the left and then click on “Summary/Print”. When you see the summary, scroll down and click on “PRINT”.</td>
<td>




</td>
</tr>
<tr>
<td>Select “Print all”.</td>
<td>


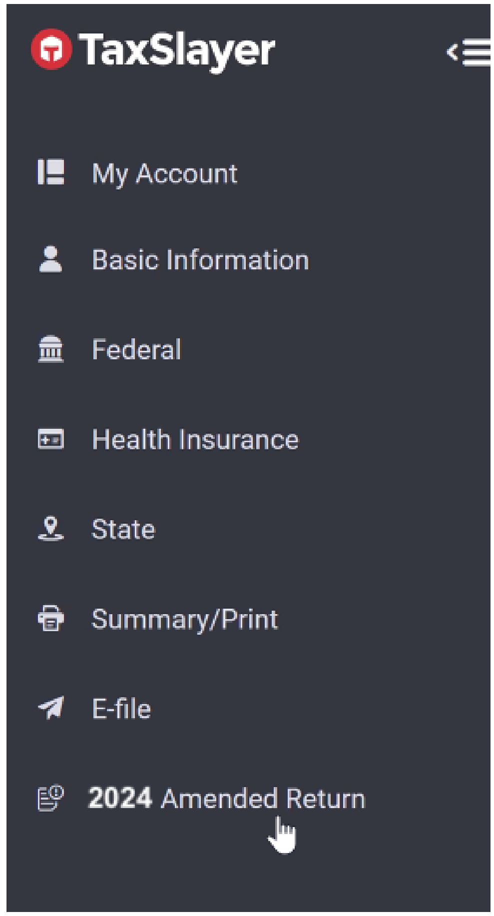
</td>
</tr>
</table>

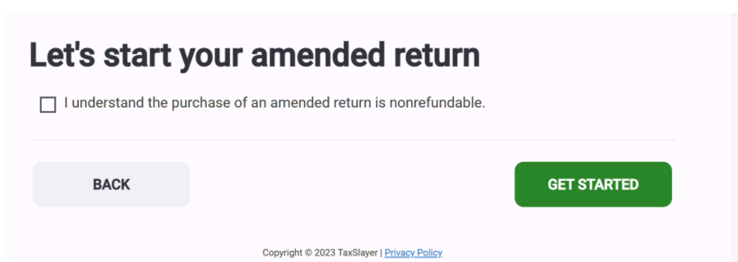
You can save your return on your computer or phone as a PDF or print it.	

Filing an Amended Tax Return using TaxSlayer

<table>
<tr>
<td>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 “XXXX 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”.</td>
<td>


</td>
</tr>
<tr>
<td>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</td>
<td></td>
</tr>
</table>

process to file your Amended Return the same way as your Federal Return.	

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 21 – October 31.
- Email: info@myfreetaxes.com