

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.

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Step 1: Go to MyFreeTaxes.org

Go to 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"**.

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"**.

LET US HELP YOU FILE YOUR OWN TAXES FOR FREE.

This is a great option for people who:

- Are filing a current year return (for 2024 taxes).
- Are comfortable using tax software, or want to learn.

DID YOU EARN LESS THAN \$84,000 IN 2024?*

☒ YES ☐ NO

WHAT IS YOUR ZIP CODE?*

Zip code

DO YOU HAVE INCOME FROM SELF-EMPLOYMENT?*

☐ YES ☐ NO

☐ I WOULD LIKE TO OPT-IN TO BE CONTACTED BY UNITED WAY (OPTIONAL).

Your Civil Rights are PROTECTED

Sus Derechos Civiles están PROTEGIDOS

In accordance with federal law and the Department of the Treasury - Internal Revenue Service policy, discrimination against taxpayers on the basis of race, color, national origin (including limited English proficiency), disability, sex (in education programs or activities), age or marital status is prohibited in programs and activities receiving federal financial assistance. Taxpayers with a disability may request a reasonable accommodation and taxpayers with limited English proficiency may request language assistance to access service.

De acuerdo con la ley federal y la política del Departamento del Tesoro - Servicio de Impuestos Internos, la discriminación contra los contribuyentes basada en raza, color, origen nacional (incluye el dominio limitado del inglés), discapacidad, género (en los programas educativos o actividades), edad o estado civil, está prohibida en los programas o actividades que reciben asistencia financiera federal.

Los contribuyentes con una discapacidad pueden solicitar asistencia razonable y contribuyentes con un dominio limitado del inglés pueden solicitar asistencia con el idioma para tener acceso al servicio.

Operations Director,
Civil Rights Division
Internal Revenue Service
Room 2412
1111 Constitution Avenue, NW
Washington, DC 20224

If a taxpayer believes he or she has been discriminated against, a written complaint should be sent to the address referenced herein. For all other inquiries concerning taxpayer civil rights, contact the Internal Revenue Service at 1-800-829-1040.

Si un contribuyente cree que se le ha discriminado, debe enviar una queja por escrito al IRS a la dirección de referencia. Para todos los demás consultas relacionadas a los derechos civiles del contribuyente, comuníquese a la dirección que aparece en esta publicación o al número telefónico 1-800-829-1040.

IRS

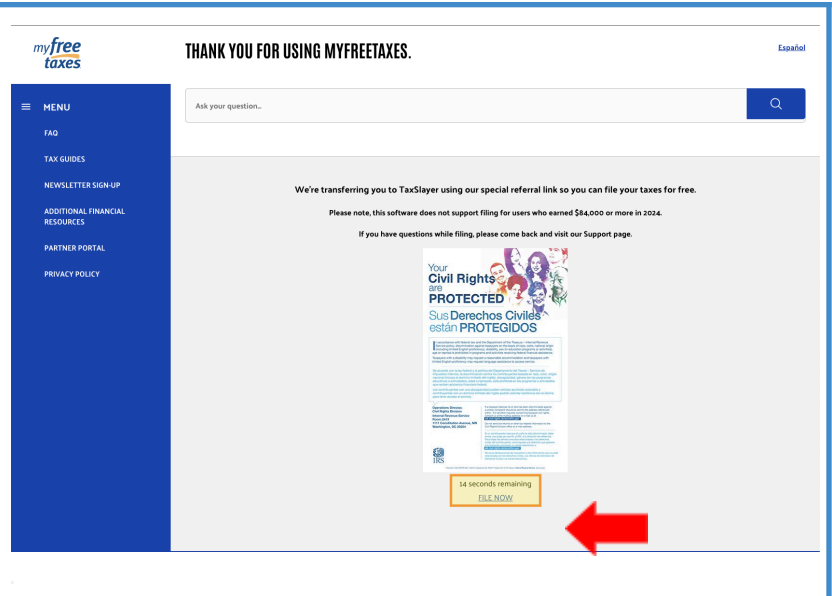
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FILE NOW

MyFreeTaxes.org TaxSlayer Self-Filing Guide

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.



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.

TaxSlayer

Log in

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

Username, email, or phone number

[Forgot Username](#)

LOG IN

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

Copyright © 2025 TaxSlayer

Language:

en (US) ▾

SAVE

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.

TaxSlayer

Create your account

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

Email address

Username

Password

Mobile phone (For security and password recovery)
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](#).



Check your phone

Please enter the verification code we sent to
(***)***-***88

Enter the 6-digit code

[Resend verification code](#)



Language:

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



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

Now, let's keep going.



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

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

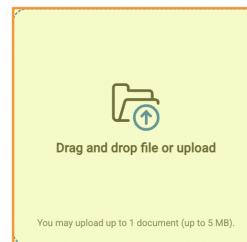
If not, click **"Skip"**.

≡ > 2024 | AMERICAN PLEDGE

Help & Support ⓘ

Upload last year's tax return (Form 1040)

If you have a copy of your 2023 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.



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 MM DD YYYY

Occupation

BACK

Skip

CONTINUE

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 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**".

Personal Information

Country *
United States

Address (street number & name) *

Apartment (provide apartment number only)

ZIP code *

City, town or post office *

State *
Select

What is your state residency status? *

☐ I am a full-year resident of this state

☐ I am a full-year resident of another state

☐ I am a part-year resident of this state

☐ I have a stateside military address

BACK

CONTINUE

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, 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.

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Skip

CONTINUE

Select your filing status

Please note:

- 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**".

Click **"CONTINUE"**.

What's your filing status?

- ☐ Single
- ☐ Married filing jointly
- ☐ Married filing separately
- ☐ Head of household
- ☐ Qualifying surviving spouse
- ☐ Nonresident Alien

Need help determining your filing status?

[FILING STATUS WIZARD](#)

[BACK](#)

[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 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"**.

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 & 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 *

Social Security number (ITIN & 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

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

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](#)

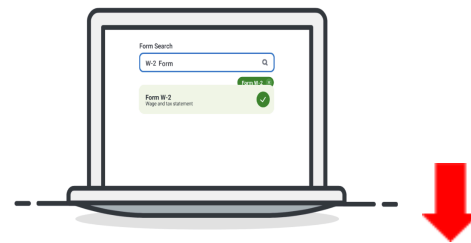
Step 4: Enter Your Income if you had earned income, college scholarships or were self-employed.
This includes tax documents such as W-2, 1099-NEC or MISC, 1098-T etc.

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

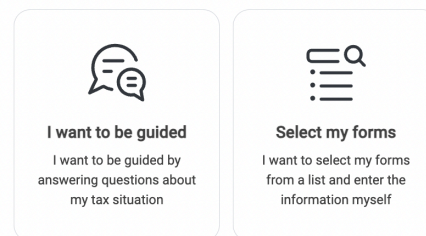
Click either:

- **"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?



BACK

Skip Income

CONTINUE

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"**.

INCOME GUIDE

Wages & 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) *

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

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 the tax year, you should have a 1099-G form with an amount in box 1.

Please note:

- 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 [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 2024? 

☐ Yes 

☐ No

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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 2023? 

- ☐ Yes
- ☐ No



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CONTINUE

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

INCOME GUIDE

Interest & Dividend Income

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

Did you have any interest or dividend income in 2024? 

- ☐ Yes
- ☐ No



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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

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

Miscellaneous Income

Form 1099-MISC

Did you receive a Form 1099-MISC ? ⓘ

☐ Yes

☐ No



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CONTINUE

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](#) to add up your qualified business expenses.

INCOME GUIDE

Nonemployee Compensation

Form 1099-NEC

Did you receive a Form 1099-NEC? ⓘ

☐ Yes

☐ No



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CONTINUE

If you owned a business or performed contract labor for an employer, 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 2024? ⓘ

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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CONTINUE

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"**.

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

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

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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CONTINUE

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Help & Support 

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

[Learn More](#)

BEGIN

Form 8997 - Initial and Annual Statement of Qualified
Opportunity Fund (QOF) Investments

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

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
- 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



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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"**.

Please note:

- Click the question mark icon for additional information.

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

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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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[Restart/Exit Income Guide](#)

CONTINUE

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)

[Learn More](#)

BEGIN

Fringe Benefits

[Learn More](#)

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 W-2G

BEGIN

Strike Benefits Received

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

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

BACK

[Restart/Exit Income Guide](#)

CONTINUE

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.

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, 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

BACK

[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 2024 but you're still collecting payments in 2025, you would select Yes.

☐ Yes

☐ No



BACK

[Restart/Exit Income Guide](#)

CONTINUE

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.



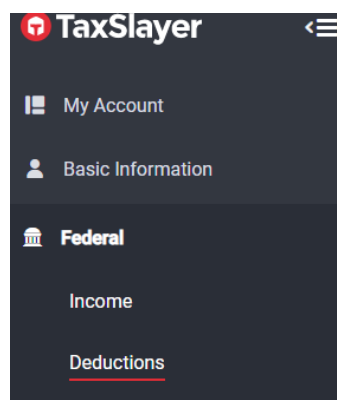
Select my forms

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

BACK

[Skip Deductions](#)

CONTINUE



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

BACK

[Restart/Exit Deductions Guide](#)

CONTINUE

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.

DEDUCTIONS GUIDE

Child & Dependent Care

Did you pay any dependent care expenses to an individual or day care center in 2024? 

☐ Yes

☐ No

BACK

[Restart/Exit Deductions Guide](#)

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 *

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

[Restart/Exit Deductions Guide](#)

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.

DEDUCTIONS GUIDE

Adoption Expenses

Did you pay any adoption expenses? 

☐ Yes

☐ No



BACK

[Restart/Exit Deductions Guide](#)

CONTINUE

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"**.

DEDUCTIONS GUIDE

Home & Property Ownership

Did you own a home or property at any time in 2024?

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



BACK

[Restart/Exit Deductions Guide](#)

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](#).

DEDUCTIONS GUIDE

Charitable Contributions



You may qualify for a tax deduction if you made cash charitable contributions to a public charity in 2024.

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

Did you make any charitable contributions in 2024?

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

BACK

[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

BACK

[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

BACK

[Restart/Exit Deductions Guide](#)

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.

DEDUCTIONS GUIDE

Student Loan Interest

Form 1098-E Box 1

Did you pay any student loan interest in 2024? 

☐ Yes

☐ No

BACK

[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 2024? 

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

BACK

[Restart/Exit Deductions Guide](#)

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

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 2024?

- ☐ Yes
☐ No



Did the student receive Form 1098-T from this institution for 2023 with 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 *

United States of America

Address (street number & name) *

ZIP code *

City, town, or post office *

State *

- Please Select -

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



CANCEL

CONTINUE

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 2024, enter the amounts in the corresponding fields to determine the amount eligible for an education tax credit.

Tuition Paid

Grants and Scholarships

Other Qualified Expenses

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 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"**.

EDUCATION GUIDE

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 at least half-time for at least one academic period beginning in 2024 (or the first 3 months of 2025, if paid in 2024)?

☐ Yes

☐ No

Did the student complete the first four years of higher education before 2024?

☐ Yes

☐ No

Did the student have a felony drug conviction before the end of 2024?

☐ Yes

☐ No

CANCEL

CONTINUE

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: Check this [IRS page](#) 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

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

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

BACK

[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

BACK

[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

BACK

[Restart/Exit Deductions Guide](#)

CONTINUE

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

Other Taxes

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

[Learn More](#)

BEGIN

Alternative Minimum Tax (AMT)
Reported on Form 6251

[Learn More](#)

BEGIN

Household Employment Taxes
Reported on Schedule H

[Learn More](#)

BEGIN

Net Investment Income Tax (NIIT)
Reported on Form 8960

BEGIN

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

[Learn More](#)

BEGIN

Repayment of First-Time Homebuyer Credit
Reported on Form 5405

[Learn More](#)

BEGIN

Self-Employment Tax
Reported on Schedule SE

BEGIN

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

[Learn More](#)

BEGIN

Tax For Certain Children Who Have Unearned Income
Reported on Form 8815

[Learn More](#)

BEGIN

BACK



CONTINUE

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

Payments and Estimates

Amount Paid with Extension

This is the amount you paid when you applied for a 6-month extension using Form 4868

[Learn More](#)[BEGIN](#)**Federal Estimated Tax Payments**

Federal tax payments already made for 2024

[Learn More](#)[BEGIN](#)**State Estimated Tax Payments**

State tax payments already made for 2024

[Learn More](#)[BEGIN](#)**Other Federal Withholdings**

Federal withholdings you haven't already entered

[Learn More](#)[BEGIN](#)**Other State Withholdings**

State withholdings you haven't already entered

[Learn More](#)[BEGIN](#)**Underpayment of Estimated Tax**

Determine if you owe a penalty for underpayment of estimated tax and next steps

[Learn More](#)[BEGIN](#)**Apply Overpayment to Next Year's Taxes**

You can take the cash now or roll it over to next year's taxes. Up to you!

[Learn More](#)[BEGIN](#)**Vouchers for 2025 Estimated Tax Payments**

Print vouchers for estimated tax payments

[Learn More](#)[BEGIN](#)**IRC 1341 Repayment Amount**

Claim of Right related tax credit

[Learn More](#)[BEGIN](#)**Other Payments or Refundable Credits**[BEGIN](#)[BACK](#)[CONTINUE](#)

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.

Miscellaneous Forms

Allocation of Tax Amounts for Individuals in Certain States Reported on Form 8958 (Only for Married filing separately and some domestic partnerships) Learn More	BEGIN
Application for Automatic Extension of Time to File Applied on Form 4868 Learn More	BEGIN
Injured Spouse Allocation Reported on Form 8379 Learn More	BEGIN
Request for Innocent Spouse Relief Requested on Form 8857	BEGIN
Installment Agreement Request Requested on Form 9465 Learn More	BEGIN
IRS Identification PIN This is the PIN you need if you received a CP01A notice from the IRS Learn More	BEGIN
Statement of Person Claiming Refund Due a Deceased Taxpayer Claimed on Form 1310 Learn More	BEGIN
Statement of Specified Foreign Financial Assets Reported on Form 8938	BEGIN
Individual Report of Net 965 Tax Liability Reported on Form 965-A	BEGIN
Other Miscellaneous Forms Other Miscellaneous items that are reported on least used forms	BEGIN

BACK

CONTINUE

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"**.

Affordable Care Act Health Insurance

Important Info
Please read carefully as answering this question incorrectly can lead to a rejected return.

Reported to you on Form 1095-A, this type of coverage is also commonly known as Obamacare, HealthCare.gov, or a state marketplace.

Did you, your spouse, or a dependent have insurance under the Affordable Care Act?

- ☐ Yes
☐ No

BACK

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.

State returns are \$0.00 each.

BACK



[Skip state return](#)

GET STARTED

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

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 **“BEGIN”** on the **“Credits”** section to claim CA state credits.

California Return

Introduction

Need-to-know CA tax info

BEGIN

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

BEGIN

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)

BEGIN

Miscellaneous Forms

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

BEGIN

EXIT CALIFORNIA RETURN

To claim the Foster Youth Tax Credit, click **"BEGIN"** 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

BEGIN

Schedule S, Other State Tax Credit

BEGIN

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

BEGIN

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

\$

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

- You are at least 18 years old and younger than 26 years old as of the last day of the taxable year.
- You were in foster care while 13 years of age or older and placed through the California foster care system.

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

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

Please note:

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

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: piar@dss.ca.gov
- Mail: 744 P Street, Sacramento, CA 95814
- Out-of-State Inquiries: 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

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

Introduction

Need-to-know CA tax info

[BEGIN](#)

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)

[BEGIN](#)

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](#)

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"**.

Tax Return Summary

Total Income	\$XX,XXX.XX ▾
Adjusted Gross Income	\$XX,XXX.XX ▾
Tax And Credits	\$XXX.XX ▾
Total Tax	\$XX.XX ▾
Payments	\$XXXX.XX ▾
Federal Refund	\$XXXX.XX ▾
California Refund	\$XXX.XX

DOWNLOAD RETURN ▾

PRINT RETURN ▾

BACK

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.

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!

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 2024 tax return was accepted by the IRS.

[TRACK REFUND](#)[ACCESS MY RETURN](#)

RETURN	STATUS
Federal	Accepted ⓘ
California	Sent ⓘ

[PRINT](#)[VIEW DETAILS](#)

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 2022 Tax Return. It features a welcome message, a green paper airplane icon, and a table of filed returns.

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

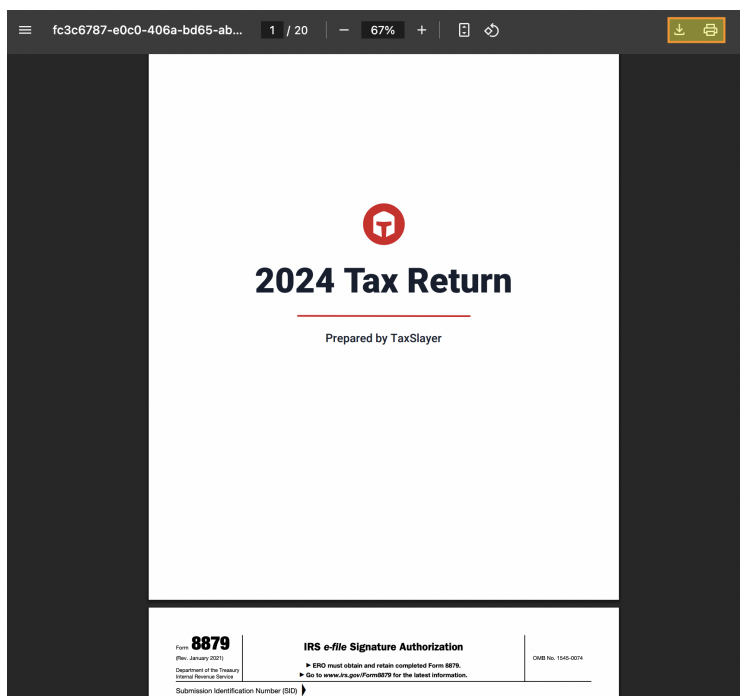
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Click on the toolbar on the left and then click on **"Summary/Print"**. When you see the summary, scroll down and click on **"PRINT"**.

Select **"Print all"**.

MyFreeTaxes.org TaxSlayer Self-Filing Guide

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

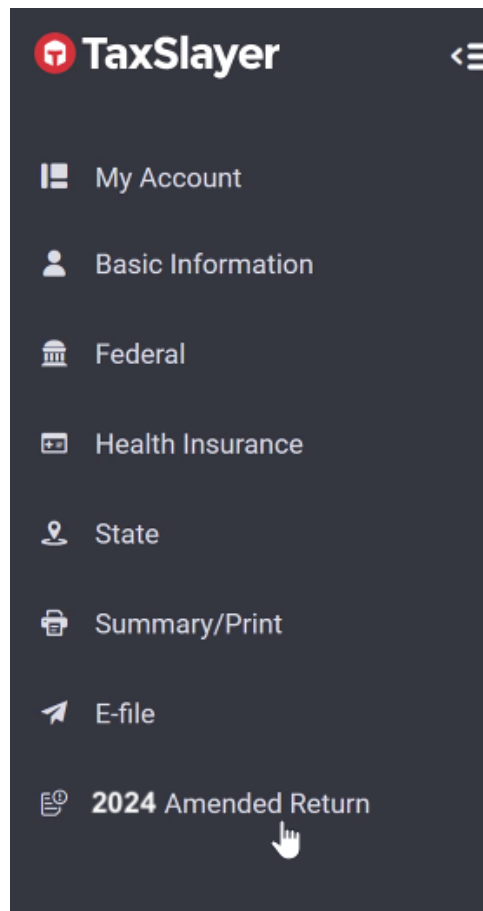


Filing an Amended Tax Return using TaxSlayer

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 **“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”**.



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.

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