

## File Myself with GetYourRefund

**Purpose:** This guide is intended to help you file your own return using GetYourRefund.org's File Myself option. Use the index below to skip to specific sections.

If you don't have any reportable income and just need to file a return to claim your remaining Child Tax Credit or third stimulus payment, please see this guide or go to [GetCTC.org](https://getctc.org) to sign up to be notified once GetCTC Express filing is available in May 2022.

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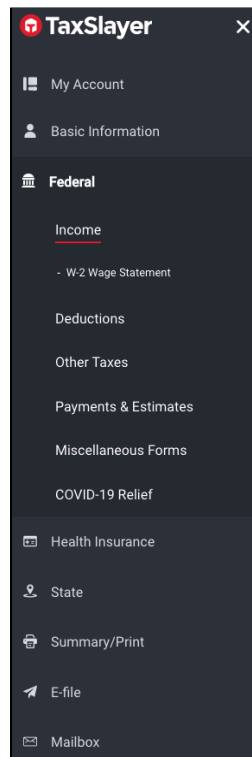
### Getting Started Tips and Best Practices

- Make sure you have the following:
  - A valid email address
  - All 2021 tax documents (W2s, 1099s, SSA-1099)
  - Amount of 3rd stimulus check received (see IRS Letter 6475 or [your IRS account](#))
  - Amount of any Advance Child Tax Credit payments received (see IRS Letter 6419 or [your IRS account](#))
  - Last year's exact Adjusted Gross Income (AGI)
    - If you didn't file last year, you don't need to enter any information
    - If you used the IRS non-filer tool or GetCTC.org, your AGI is \$1.

- If you did file a full tax return last year, you can find this information on a copy of your 2020 return or retrieve the information in [your IRS account](#).
- To qualify for the free software:
  - Your household's AGI must be under \$73,000. If you make over this amount, the software will not let you continue.
  - You can only file for the current tax year (2021). If you need to file a prior year (2018-2020) go to [GetYourRefund.org](#) to get additional assistance.
  - You must start your return using a unique link at [GetYourRefund.org/DIY](#), at [MyFreeTaxes.com](#), or by a Volunteer Income Tax Assistance (VITA) site.
- Tips and Best Practices
  - If you missed your 3rd stimulus payment or received a smaller than expected amount, make sure to enter that information while preparing your tax return (see [Report missing stimulus payment](#)) for more information.
  - Take your time and double check everything before moving to the next page.
  - Type your name and the name of your dependents exactly as it appears on the social security card or ITIN letter.
  - Whenever entering information from a tax form, make sure it matches exactly what is on the form. You should skip any boxes that are blank.
    - Generally, you should not add the state abbreviation to a tax form if there are no amounts listed in the state boxes.
  - If you have questions, you can either:
    - Click on the "Help & Support" button in the upper right corner to email us
    - Or open a new tab To [GetYourRefund.org](#) and use the chat feature
  - If you need help to get back to a previous section or skip ahead to a new section, you can do so by using the left navigation panel. To get to the left navigation panel, click on the option in the top left corner, as marked below:


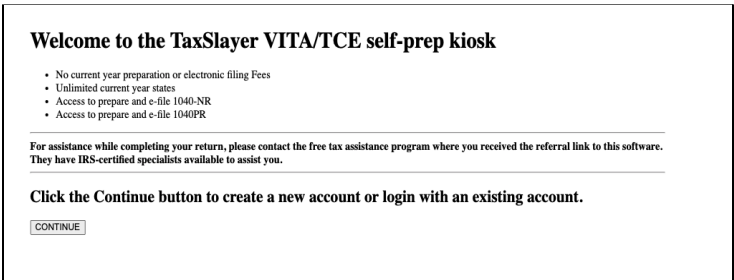
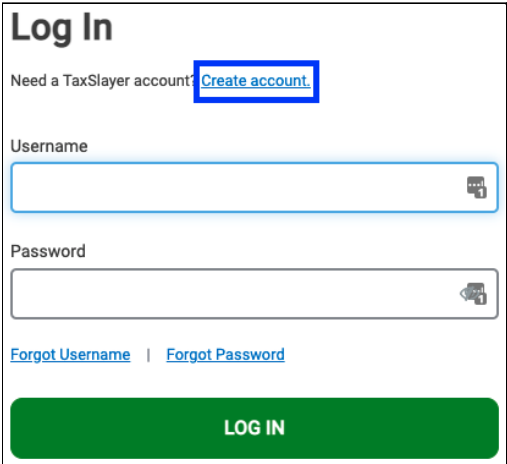
The screenshot displays the '2021 | American Pledge' software interface. A red box highlights the hamburger menu icon in the top left corner. The interface includes a sidebar with navigation icons, a top bar with the title '2021 | American Pledge' and a 'Help & Support' link, and a main content area titled 'Basic Information'. This area contains three sections: 'Personal Information' with an 'EDIT' button, 'Filing Status' with an 'EDIT' button, and 'Dependents / Qualifying Person' with a 'BEGIN' button. At the bottom of the main area are 'BACK' and 'CONTINUE' buttons.

You can then jump to specific sections and forms you've already completed:



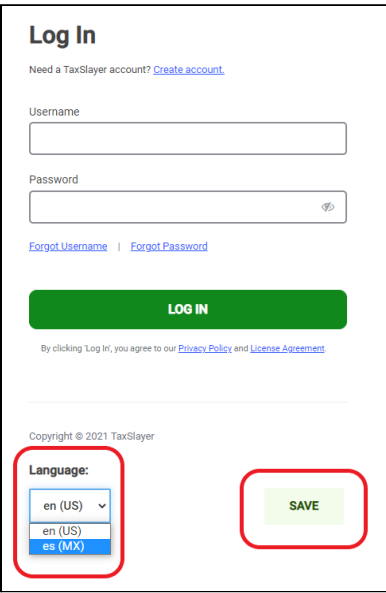
## Referral to TaxSlayer

The information below shows the pages you should see while going from GetYourRefund.org to the free filing software, TaxSlayer. Do not go directly to TaxSlayer or you will be taken to the paid version.

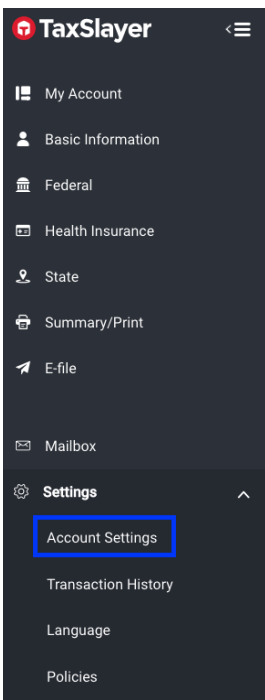
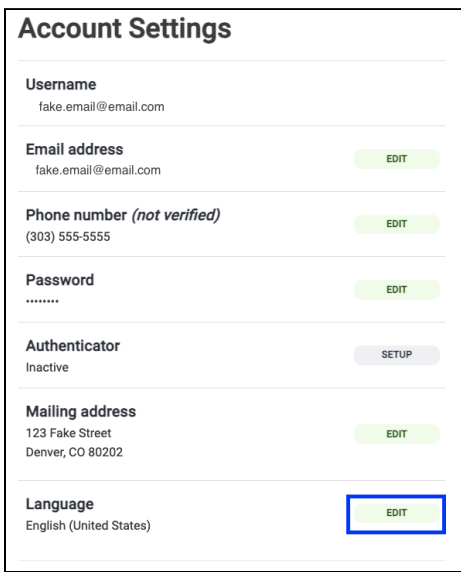
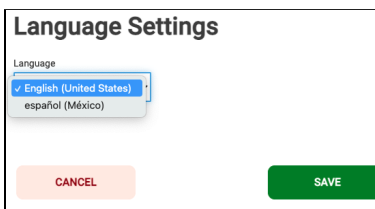
Screenshots	Notes (if needed)
	You need to enter your email twice and then click “continue” to be routed to the correct site. The link will not be emailed to you. If you need to get back to the free software, you can return to <a href="https://GetYourRefund.org/diy">GetYourRefund.org/diy</a> and reenter your email.
	This page ensures you are using the free product available through volunteer income tax assistance programs. Click “continue” to access the free software.
	Click “create account” at the top.  From here you can also switch the software to Spanish at the bottom of the page by selecting “es(MX)” and then click “save”  See <a href="#">creating an account</a> tips for more information.

## How to switch the software to Spanish

To switch an account to Spanish before creating an account:

	<p>From the login page, switch the software to Spanish at the bottom of the page by selecting “es(MX)” and then click “save”</p> <p>You’ll then be able to create an account and complete your tax return in Spanish.</p>
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To switch an account to Spanish after creating an account:

<p>1. From the left navigation panel, select “Account Settings”</p>	<p>2. At the bottom of the page, click “edit” next to language.</p>	<p>3. Select “español (México)” and click save.</p>
		

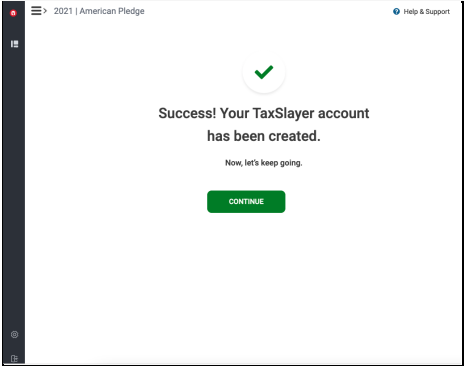
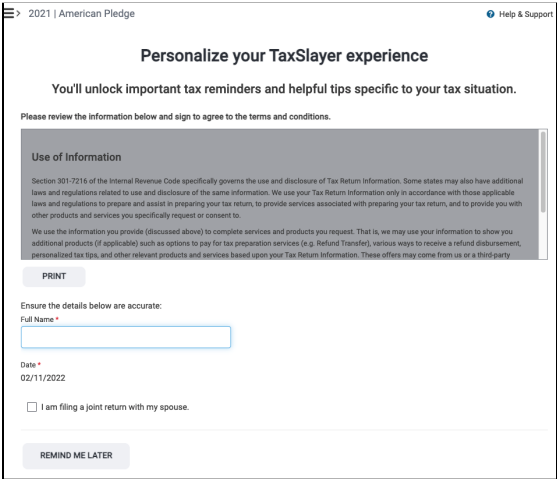
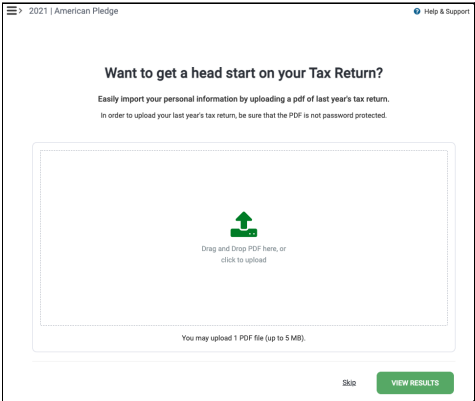
## Create an account

Tips on creating an account:

1. Enter your email address
2. Create a unique username
  - a. The software will not continue until you create a username that hasn't been used by any other user. It may take a few tries to find an unused username.
3. Create a password that has:
  - a. 8 characters, one UPPER CASE letter, one lower case letter, one number, one special character (for example: \$, %, !)
  - b. Example of an acceptable password: TESTexample5!
    - i. DO NOT USE THIS PASSWORD
4. Write your username and password in a safe place to log back into the software whenever needed
5. Enter mobile phone for easier access in the future (recommended but optional)
6. Click "Create Account"

## Getting started

Below are screenshots of pages you will see after creating your TaxSlayer account and important information to consider.

Screenshot	Notes
	
	You can choose to opt-in to receive updates and promotional information from TaxSlayer or select “Remind Me Later” and then opt-out on a different screen.
	If you have an electronic copy of last year’s tax return, you can upload it on this page to help pre-populate some of the information from last year.  If not, don’t worry! Just click “skip.”

<div><div>2021   American Pledge</div><div>Help &amp; Support</div><div><h3>Personal Information</h3><h4>Taxpayer's Information</h4><div><div>Primary taxpayer first name</div><div></div><div>MI</div><div></div></div><div><div>Last name</div><div></div><div>Suffix (Jr, Sr, etc.)</div><div>---</div></div><div><div>SSN The IRS requires your Social Security Number for e-filing. *</div><div></div><div></div><div></div></div><div><div>Date of Birth</div><div>MM</div><div>DD</div><div>YYYY</div></div><div><div>Occupation</div><div></div></div><div><div>BACK</div><div>Skip</div><div>CONTINUE</div></div></div></div>	<p>Make sure to enter your name and SSN or ITIN exactly as it appears on your SS Card or ITIN Letter</p>
<div><div><h3>Personal Information</h3><h4>What's your mailing address?</h4><div><div>Country</div><div>United States of America</div></div><div><div>Address (street number &amp; name) *</div><div>123 Fake Street</div></div><div><div>Apartment (provide apartment number only)</div><div>4B</div></div><div><div>ZIP code *</div><div>80217</div><div></div></div><div><div>City, town, or post office *</div><div>Denver</div></div><div><div>State *</div><div>Colorado</div></div><div><div>Residency Status *</div><div>Full-Year Resident of This State</div></div><div><div><input type="checkbox"/> I have a stateside military address.</div></div><div><div>BACK</div><div>CONTINUE</div></div></div></div>	<p>Enter a secure mailing address. Even if you select direct deposit the IRS or your state agency may send you a check in the mail or important notices using this address.</p> <p>Select your state residency status. If you live in multiple states, select part-year.</p>
<div><div><h3>Phone Settings</h3><div><div><div>Phone number usage</div><div>The IRS requires your phone number to file electronically. Plus, it's one of the most reliable methods for us to contact you regarding your return.</div></div></div><div><div>Mobile phone</div><div></div></div><div><div><input type="checkbox"/> Verify my account with text message. Standard call, messaging, or data rates may apply.</div></div><div><div>Terms and Conditions</div></div><div><div>CANCEL</div><div>SAVE</div></div></div></div>	<p>To make logging back into the software easier, we strongly recommend checking the box to verify your account with text messages.</p>

<div data-bbox="256 212 878 758"> <h3>Additional Information</h3> <p><b>Taxpayer's Information</b></p> <p>Check any of these that apply to you:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Jane can be claimed as a dependent on someone else's return. <a href="#">Learn more</a></li> <li><input type="checkbox"/> Jane was over age 18 and a full-time student at an eligible educational institution. <a href="#">Learn more</a></li> <li><input type="checkbox"/> Jane is blind.</li> <li><input type="checkbox"/> Jane is deceased.</li> <li><input type="checkbox"/> Jane wishes to contribute \$3 to the Presidential Election Campaign Fund.</li> <li><input type="checkbox"/> Jane served in a combat zone during the current tax year. <a href="#">Learn more</a></li> <li><input type="checkbox"/> Jane wishes to elect to use their 2019 earned income to figure their 2021 earned income credit and/or child tax credit.</li> <li><input type="checkbox"/> Jane was affected by a natural disaster during the current tax year.</li> <li><input type="checkbox"/> Jane received, sold, sent, exchanged, or otherwise acquired financial interest in virtual currency during the current tax year.</li> <li><input type="checkbox"/> Jane prefers to receive written communications from the IRS in a language other than English.</li> <li><input type="checkbox"/> Jane prefers to receive written communications from the IRS in an accessible format.</li> </ul> <div> <span>BACK</span> <span>Skip</span> <span>CONTINUE</span> </div> </div>	<p>Read each box carefully to see if the situation applies to you.</p> <p>If your earned income was higher in 2019 than in 2021, you can elect to enter the 2019 amount on this screen to potentially increase your Earned Income Tax Credit and help get you a larger refund. You can find this information on your 2019 return. Add together line 1 (wages, salaries, tips) and any self-employment income.</p>
<div data-bbox="261 798 868 1047"> <h3>What's your filing status? <a href="#">Learn more</a></h3> <div> <input type="radio"/> Single         <input type="radio"/> Married Filing Jointly         <input type="radio"/> Married Filing Separately         <input checked="" type="radio"/> Head of Household         <input type="radio"/> Qualifying Widow(er) with Dependent Children         <input type="radio"/> Nonresident Alien       </div> <div>         Need help determining your filing status?         <span>FILING STATUS WIZARD</span> </div> <div> <span>BACK</span> <span>CONTINUE</span> </div> </div>	<p>If you're unsure about your filing status, use the "Filing Status Wizard" to help find your best filing status.</p>
<div data-bbox="406 1087 727 1526"> <h3>Personal Information</h3> <p><b>Spouse's Information</b></p> <p>Spouse first name <input type="text"/> MI <input type="text"/></p> <p>Last name <input type="text"/> Suffix (Jr, Sr, etc.) <input type="text"/></p> <p>SSN <input type="text"/>-<input type="text"/>-<input type="text"/></p> <p>Date of Birth <input type="text"/> MM <input type="text"/> DD <input type="text"/> YYYY <input type="text"/></p> <p>Occupation <input type="text"/></p> <div> <span>BACK</span> <span>CANCEL</span> </div> </div>	<p>If filing Married, you'll be prompted to enter similar information for your spouse. Follow the same guidelines from above.</p>
<div data-bbox="207 1568 927 1797"> <h3>Dependents or Qualifying Person(s)</h3> <p>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. <a href="#">Learn more</a></p> <p>Do you have any dependents or qualifying person(s) to claim on your return?</p> <div> <span>YES</span> <span>NO</span> </div> </div>	<p>Answer yes if you qualify to claim a child or relative on your return.</p> <p>See <a href="#">adding a dependent</a> below for more information.</p>

### 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

An Identity Protection PIN (IP PIN) is a six-digit number the IRS provides to people who have been victims of identity theft, or who opted into the IP PIN program.

If you, your spouse, or dependents were issued an IP PIN, mark yes and enter the number on the following screen.

If you lost your IP PIN or never received this year's number, you can try retrieving it [here](#).



#### Personal Information:

##### Primary Taxpayers:

MARGE SIMPSON  
07/01/1987  
221-33-4444  
FACTORY WORKER

[edit](#)

HOMER SIMPSON  
04/23/1990  
778-88-9898

[edit](#)

##### Dependents:

LISA SIMPSON  
Daughter  
02/05/2019  
854-72-9898

[edit](#)



#### Contact Information:

##### Mailing Address:

1350 Josephine Street  
Denver, CO  
*Full-Year Resident of This State*

[edit](#)

##### Phone Number:

(303)555-5555  
*Use this number to verify account*

[edit](#)



#### Tax Information:

##### Filing Status:

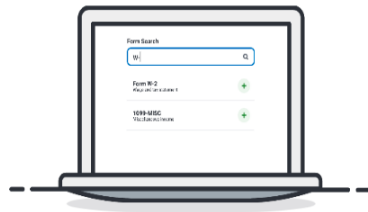
Married Filing Jointly

[edit](#)

Review your basic information before continuing to the next screen. If you see an error, click “edit” to return to the page and make necessary edits.

## 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

You'll be given the option to:

A. Quickly add your forms by clicking "Continue" (preferred option, if you know what forms you have)

B. Or select "I don't know which forms I need" and be given other options

## Need a particular form? Start typing the form name below and then select the best match.

Search for all of the forms that you need. Don't see your form? No worries! You'll have a chance to enter more later!

Form Search

1099

1099-INT

Interest Income

1099-INT

Tax Exempt Interest Income

1099-INT

Seller Financed Interest Income

1099-DIV

Dividend Income

1099-B

Capital Gains and Losses

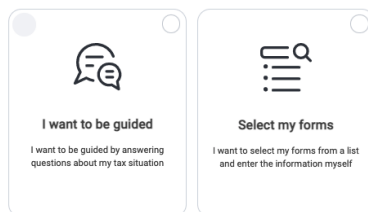


No forms currently selected

If you choose **Quick File**, you'll be taken to this screen where you'll be asked to add all documents

## 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 2021! How would you like to enter your income?



BACK

[Skip Income](#)

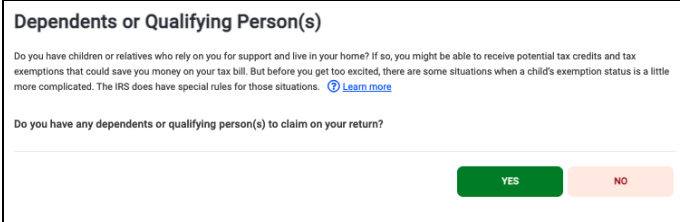
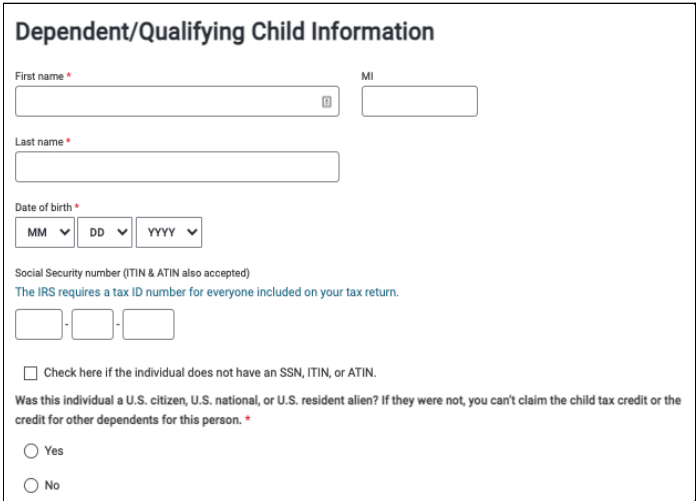
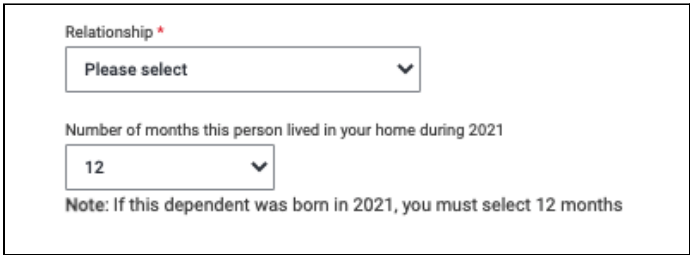
CONTINUE

If you choose **I don't know which forms I need** you'll be given the options:

1. I want to be guided: You'll be asked Yes/No questions for every type of income
2. You can select the type of income you received from a list.

## Adding a dependent

Below are screenshots of pages you should see if adding dependents and important information to consider.

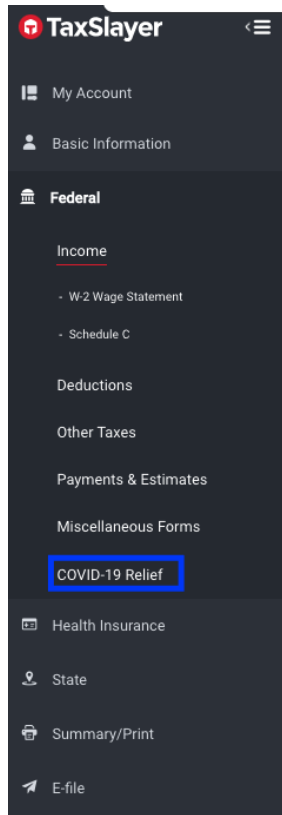
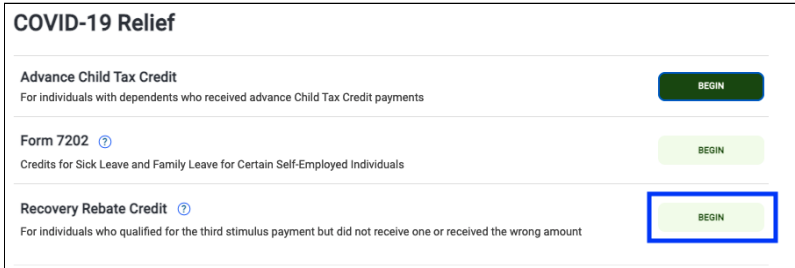
Screenshots	Notes
	<p>Answer “yes” if you qualify to claim a child or relative on your return.</p> <p>If you’re unsure, ask for help at <a href="https://www.getyourrefund.org">GetYourRefund.org</a></p>
	<p>Make sure to enter your dependent’s name and SSN/ITIN exactly as it appears on their SS Card or ITIN Letter.</p> <p>If a dependent doesn’t have an SSN or ITIN, you can apply for an ITIN, however, this will have additional steps that must be taken outside of the software. Learn more about applying for an ITIN <a href="#">here</a>. If you need additional assistance, go to <a href="https://www.getyourrefund.org">GetYourRefund.org</a> to seek assistance from a Volunteer Income Tax Assistance program.</p>
	<p>(Dependent page continued)</p> <p>Choose the closest relationship the dependent is to you.</p> <p>Enter the number of months the dependent lived with you.</p> <p>Enter 12 months if your dependent was born or died in 2021 or they were temporarily absent for special circumstances including school, vacation, medical care, military service, or detention in a juvenile facility.</p>

<p>Check any of these that apply to you:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> This person was over age 18 and a full-time student at an eligible educational institution.</li> <li><input type="checkbox"/> This person was DISABLED.</li> <li><input type="checkbox"/> This qualifying child is NOT YOUR DEPENDENT. <b>Note #1</b></li> <li><input type="checkbox"/> You wish to NOT claim this dependent for Earned Income Credit purposes. <b>Note #2</b></li> <li><input type="checkbox"/> This dependent is married. <a href="#">? Learn more</a></li> <li><input type="checkbox"/> This dependent made over \$4,300 of income</li> </ul> <p>If you're unsure, ask for help at <a href="https://www.getyourrefund.org">GetYourRefund.org</a></p>	<p>(Dependent page continued)</p> <p>Read each question carefully and select if the situation applies. These questions help determine eligibility for certain credits.</p> <p>Note 1: If someone else is claiming your dependent but they are still your qualifying child for Head of Household or EITC purposes, mark this box</p> <p>Note 2: If you are a noncustodial parent and it's your year to claim the child as a dependent, check this box. In order to qualify for the Earned Income Credit, the child <i>must</i> live with you for over 1/2 the year.</p>
<p><b>Dependent or Qualifying Child</b></p> <p><a href="#">+ Add a Dependent or Qualifying Child</a></p> <div> <div>LISA SIMPSON</div> <div>Social Security Number xxx-xx-9898</div> </div> <p>CONTINUE</p>	<p>If you need to add another dependent, click on the option "Add a Dependent or Qualifying Child"</p>
<p><b>Advance Child Tax Credit</b> <a href="#">? Learn More</a></p> <p>Did you (or your spouse) have a principal place of abode in the U.S. for more than half of 2021?</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p>Did you (or your spouse) receive any advance Child Tax Credit payments?</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p>	<p>If your child appears to qualify for the CTC, you'll be asked additional questions.</p> <p>Mark "yes" to the first question if your main home was in the 50 states or the District of Columbia for more than one-half of 2021.</p> <p>Advance Child Tax Credit payments is referring to the monthly payments sent anytime between July-December 2021.</p>
<p><b>Advance Child Tax Credit</b> <a href="#">? Learn More</a></p> <p>Total amount of advance Child Tax Credit payments received to date</p> <p>\$ <input type="text"/></p> <p>Number of qualifying children taken into account in determining the annual advance amount you received for 2021</p> <p><input type="text" value="0"/></p> <p><b>CAUTION:</b> If information does not match the IRS records, your refund may be delayed by several months in order for the IRS to correct your return and issue follow up information.</p>	<p>If you marked that you received any advance payments, you'll need to enter the exact amount you received between July-December. This information was sent in January in IRS <a href="#">Letter 6419</a>. If you are married filing jointly, you need to add amounts from both letters.</p> <p>If you don't have the letter, or you don't think the information is correct, you can try retrieving the information by creating and logging into your <a href="#">IRS Account</a>.</p>

## Report missing stimulus payment

A third stimulus payment (Economic Impact Payment 3) was sent to most Americans in April-June of 2021. This payment was worth up to \$1,400 for each eligible adult and qualifying dependent in a household. If you didn't receive your third stimulus payment or received a smaller than expected amount, you can claim the missing payment as a refund on your 2021 tax return. Follow the instructions below to claim a missed payment while using TaxSlayer.

*Note: Stimulus payments are not taxable*

Screenshot	Notes
	Click on the left navigation panel and select "Covid-19 Relief" at the bottom of the federal section.
	Select "Recovery Rebate Credit"

### Recovery Rebate Credit

Did you, your spouse, or anyone claimed on this return receive a stimulus payment during the third round of payments (distributed in 2021)?

This information is strictly used to ensure you receive the full amount you're entitled. It will not increase your taxable income or taxes due.

☒ Yes, we received stimulus payment(s) during the third round of payments.

Total amount received during the third round of payments \*

May be reported on Notice 1444-C

\$

☐ No, we did not receive stimulus payment(s) during the third round of payments.

CANCEL

CONTINUE

**CAUTION:** If information doesn't match the IRS records, your refund may be delayed by several months for the IRS to correct your return and issue follow up information.

Report the exact amount of the third stimulus payment received, if any. This information was reported on Letter 6475.

If you don't have the letter or you don't think the information is accurate, you can try retrieving the information by logging into your [IRS Account](#).

Mark no if you didn't receive any of the third stimulus payment.

The software will calculate the missed amount and add it as a refund on your tax return

### Tax Return Summary



Total Income	\$43,291.00	▼
Adjusted Gross Income	\$43,291.00	▼
Tax and Credits	\$0.00	▼
Total Tax	\$1,813.00	▼
Payments	\$8,272.00	▼
Federal income tax withheld from Forms W-2 and 1099	\$4,300.00	
2021 Estimated tax payments and applied from 2020	\$0.00	
Earned Income Credit (EIC)	\$772.00	
Nontaxable combat pay election	\$0.00	
Additional child tax credit	\$1,800.00	
Credit for child and dependent care expenses	\$0.00	
Refundable education credit	\$0.00	
Net premium tax credit	\$0.00	
Amount paid with request for extension to file	\$0.00	
Excess social security and tier 1 RRTA tax withheld	\$0.00	
Credit for federal tax on fuels	\$0.00	
Credits from Forms 2439, 8839, 8801 & 8885	\$0.00	
Recovery rebate credit	\$1,400.00	
Credits for Sick Leave and Family Leave Form 7202	\$0.00	

You should now see any qualifying missed stimulus payments as "Recovery Rebate Credit" on the summary print page under payments.

## Navigating income, deductions, and other section

Below is a list of common forms and information and where they are in the software. You can navigate to each of these sections using the left navigation panel.

### 1. Income:

- a. **W2:** Wages, salaries, and tips
- b. **1099-G box 1:** Unemployment compensation
- c. **1099-INT, DIV, OID :** Interest and dividends
- d. **1099-R, RRB, SSA:** Retirement and Social Security income (reported on SSA-1099)
- e. **1099-NEC:** Non-employee compensation
- f. **1099-K:** payments for contract work or self-employment work
- g. **Profit or Loss from Business:** Personal records for self-employment, 1099-NEC, and 1099-K will funnel to this section to create Schedule C
- h. Capital Gains and Losses: 1099-B

### 2. Deductions

- a. Adjustments to Income
  - i. **Educator Expenses:** K-12 expenses paid by teachers and staff
  - ii. **Student Loan Interest Deduction:** Interest paid and reported on 1098-E
  - iii. **Health Savings Account Form 8889:** Contributions or distributions reported on Form 5498-SA and 1099-SA
  - iv. **IRA Deduction:** Form 5498 or IRA records
- b. Credits
  - i. **Education Credits from 1098-T:** Education expenses
  - ii. **Child Care Credit Form 2441:** Expenses for child and dependent care. Note, you must provide the care providers Employer Identification Number or Social Security Number to claim credit.
  - iii. **Residential Energy Credit Form 5695:** Expenses for energy improvements for a main home like windows, insulation, and doors
- c. Itemized Deductions:

*Note in order for itemized deductions to help reduce your tax burden, it needs to be more than your standard deduction. You can compare the two under, “Compare Standard vs. Itemized Deductions”*

  - i. **Medical and dental expenses**
  - ii. **Mortgage Interest and Expenses:** Mortgage interest, real estate taxes, points paid, mortgage insurance premiums normally reported on Form 1098

- iii. **Taxes You Paid:** Real estate taxes paid in 2021, ownership tax for vehicle
- iv. **Gifts to Charity:** Cash and noncash donations. **Enter all cash donations, even if you do not have enough expenses to itemize.** This year, cash donations count as an above-the-line deductions

3. Other Taxes

- a. **Repayment of First-Time Homebuyer Credit:** Required if you received the 2008 First-Time Homebuyer Credit to repay a portion of your credit. See the lookup [tool here](#) if you are uncertain of the amount.

4. Payments and Estimates

- a. **Federal Estimated Tax Payments:** Federal tax payments made in 2021 and by January 18, 2021. These payments do not include what is already reported on income tax forms.
- b. **State Estimated Tax Payments:** State tax payments already made for 2021. These payments do not include what is already reported on income tax forms.

5. Miscellaneous Forms:

- a. **Injured Spouse Allocation:** Form 8379 for Married Filing Joint filers

6. Covid-19 Relief:

- a. **Advance Child Tax Credit:** Report amount received to calculate remaining credit (see [more information here](#))
- b. **Recovery Rebate Credit:** Claim missing third stimulus payment (see [Report missing stimulus payment section](#))

7. Health Insurance:

- a. Health insurance information reported on Form 1095-A. Mark "no " if you had health coverage through your Employer, Medicare, or Medicaid.



8. State Return:

- a. If you were a part-year resident or non-resident in any other state, you may need to add another state tax return. Additional information may be required by your state. You can add, edit, or delete state returns from this section.

## Reviewing your information

After completing all sections, you'll arrive at the Summary/Print page. This page shows your federal and state refund or taxes due.

You can click on the down arrows of each summary item to find additional information or click "view return" to see what will be filed with the IRS.

Tax Return Summary		
		
Total Income	\$21,321.00	▼
Adjusted Gross Income	\$21,321.00	▼
Tax and Credits	\$50.00	▼
Total Tax	\$201.00	▼
Payments	\$7,441.00	▼
Refund	\$7,240.00	▼
Colorado Refund	1,006.00	
<div> PRINT ▼</div> <div>VIEW RETURN</div>		

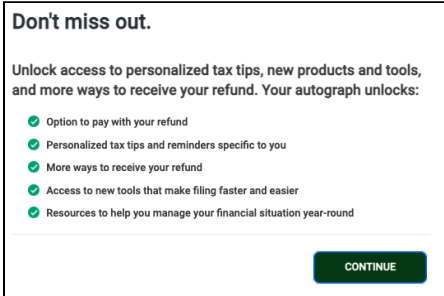
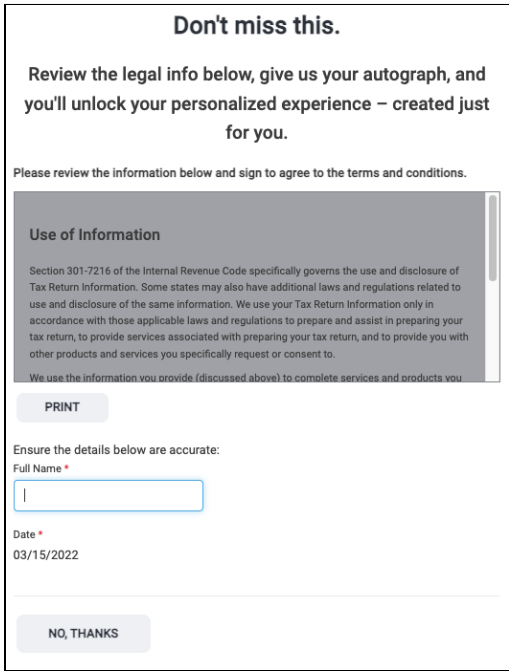
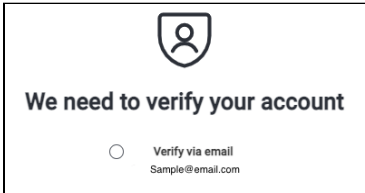





Payments	\$7,441.00 ▼
Federal income tax withheld from Forms W-2 and 1099	\$912.00
<a href="#">2021 Estimated tax payments and applied from 2020</a>	\$0.00
<a href="#">Earned Income Credit (EIC)</a>	\$3,329.00
Nontaxable combat pay election	\$0.00
Additional child tax credit	\$1,800.00
<a href="#">Credit for child and dependent care expenses</a>	\$0.00
<a href="#">Refundable education credit</a>	\$0.00
<a href="#">Net premium tax credit</a>	\$0.00
<a href="#">Amount paid with request for extension to file</a>	\$0.00
Excess social security and tier 1 RRTA tax withheld	\$0.00
Credit for federal tax on fuels	\$0.00
Credits from Forms 2439, 8839, 8801 & 8885	\$0.00
<a href="#">Recovery rebate credit</a>	\$1,400.00
Credits for Sick Leave and Family Leave Form 7202	\$0.00








Once you're comfortable with the information, click continue to finish your return and efile it with the IRS and state.




## Finishing your return

Finishing your return may look different depending on whether or not you are due a refund or owe taxes. Below are screens you may encounter with finishing up your return with additional information but please note, these screens will not appear in this exact order.

Screenshot	Notes
	You'll see this screen if you chose to skip signing the "use of information" page at the beginning.
	It's up to you if you'd like to receive additional promotional information from TaxSlayer but we recommend that you choose, "No, thanks."
	If you haven't done so already, you'll be asked to verify your account using email or text. Once verified, your screen should refresh and let you continue.

<div data-bbox="227 210 821 562"> <h3>Warnings Concerning Your Federal Return</h3> <div>  <p>There may be an error on your federal return Please take a moment to review the following before you continue</p> </div> <p>You indicated you had the following forms to add to your return. Please ensure that all of the listed forms below have been completed before filing.</p> <ul style="list-style-type: none"> <li>• <a href="#">1099-G Box 1, Unemployment Income</a></li> <li>• <a href="#">SSA-1099, Social Security Income</a></li> </ul> <div> <span>BACK</span> <span>CONTINUE</span> </div> </div>	<p>A warning page is meant to alert you about a possible issue or irregularity with your return. They are intended to give you a moment to consider if you need to take action or if the information is correct.</p> <p>For example, if you used the quick file option and selected some forms that you didn't complete, the software will let you know that those forms are not included on your tax return. If you do need to enter the forms, you can click on the links to add them. If you do not need to enter the forms, you can click continue.</p>
<div data-bbox="227 840 821 1161"> <h3>Errors Concerning Your Federal Return</h3> <div>  <p>Something's not quite right We found an error that needs to be corrected before you can file this return</p> </div> <p>We see that you do not have an institution entered on your Education Credit. To claim this credit, you must have an institution. Please edit the Education Credit add it with the required information.</p> <div> <span>BACK</span> <span>FIX THIS</span> </div> </div> <p>If you're unsure, ask for help at <a href="https://www.getyourrefund.org">GetYourRefund.org</a></p>	<p>An error page indicates the software encountered an error that needs to be resolved before continuing.</p> <p>Read the error and then click “fix this” to be routed to the section in question.</p> <p>For example, if you skipped the health insurance question, you'll return to that section and answer required question(s).</p>
<div data-bbox="227 1270 821 1528"> <h3>Ready to file?</h3> <p>If you're done with all the returns you need to file, we can get some final details and finish up!</p> <p>Are you ready to keep going?</p> <p> <input type="radio"/> Yes, I'm done with my return(s) and ready to file!         <input type="radio"/> No, I'm not ready.       </p> <div>  </div> <div> <span>BACK</span> <span>CONTINUE</span> </div> </div>	<p>Confirm that you've entered all basic and tax information.</p> <p>After completing your return, you will be able to choose how you would like to receive your refund or pay the taxes owed.</p>

<div data-bbox="316 210 732 770"> <p><b>Let's get a few more details</b></p> <p>You're almost ready to file!</p> <div> <div>1</div> <div>Federal <span>\$204</span></div> </div> <div> <p>Refund: <span>\$204</span></p> <p>Refund Method: Select method below</p> <p>Choose how you want to receive your federal refund.</p> <p>CONTINUE</p> </div> <div> <div>2</div> <div>State</div> </div> <div> <div>3</div> <div>Products &amp; Services <span>\$0</span></div> </div> <div> <div>4</div> <div>Sign &amp; File</div> </div> </div>	<p>The e-file menu will keep track of what part of the efile section you are in.</p>
<div data-bbox="321 812 724 1136"> <p><b>Federal Refund Method</b></p> <p>How would you like to receive your \$204 federal refund?</p> <div> <div> <input type="radio"/>  <p>Direct deposit</p> </div> <div> <input type="radio"/>  <p>Mailed check</p> </div> </div> </div>	<p>If you're eligible for a federal refund, you'll be given the option of direct deposit or receive a check in the mail.</p>
<div data-bbox="298 1178 748 1423"> <p><b>State Payment Method</b></p> <p>How would you like to pay your Colorado amount due of \$51?</p> <div> <div> <input type="radio"/>  <p>Direct debit</p> </div> <div> <input type="radio"/>  <p>Mailed payment</p> </div> <div> <input type="radio"/>  <p>Skip Now / File Later</p> </div> </div> </div>	<p>If you're eligible for a state refund, you'll be given the option of direct deposit, receive a check in the mail, or file at a different time.</p>
<div data-bbox="310 1465 737 1766"> <p><b>Federal Payment Method</b></p> <p>How would you like to pay your federal amount due of \$738?</p> <div> <div> <input type="radio"/>  <p>Direct debit</p> </div> <div> <input type="radio"/>  <p>Mailed payment</p> </div> </div> </div>	<p>If you owe federal taxes, you'll be given the option to pay by direct debit (taken directly from an account) or mail payment. Note, if you select mail payment you can also choose other electronic payment methods at <a href="https://www.irs.gov/payments">IRS.gov/payments</a></p>

<div data-bbox="305 212 740 443"> <p><b>State Payment Method</b></p> <p>How would you like to pay your Colorado amount due of \$838?</p> <div> <div> <input type="radio"/>  <p>Direct debit</p> </div> <div> <input type="radio"/>  <p>Mailed payment</p> </div> <div> <input type="radio"/>  <p>Skip Now / File Later</p> </div> </div> </div>	<p>If you're eligible for a state refund, you'll be given the option of direct debit, mail your payment, or file at a different time.</p>
<div data-bbox="285 483 761 714"> <p>3 <b>Products &amp; Services</b> <span>\$0</span></p> <p>Next, how do you want to pay for your fees associated with your return?</p> <p><b>CONTINUE</b></p> </div>	<p>Note: even though this option discusses fees associated with your return, if you created your return using the "File Myself" option at GetYourRefund, you will not be charged or see any promotional options.</p>
<div data-bbox="269 756 777 934"> <p><b>Want to invest your refund?</b></p> <p>Do you want to put any of your refund toward savings bonds for yourself or someone else?</p> <p> <input type="radio"/> Yes  <input checked="" type="radio"/> No         </p> </div>	<p>You'll see the option to purchase savings bonds.</p>
<div data-bbox="261 976 786 1157"> <p><b>Federal Direct Deposit Details</b></p> <p>Do you want to deposit your full federal amount into a single bank account?</p> <p> <input checked="" type="radio"/> Yes (most common)  <input type="radio"/> No, I want to split my refund between 2-3 bank accounts.         </p> </div>	<p>You will be given the option to direct your refund to one or multiple accounts.</p>
<div data-bbox="277 1199 769 1780"> <p><b>Bank Account Info</b></p> <p>Enter your account information below.</p> <p>Account nickname</p> <input type="text"/> <p>Account type</p> <div>-Select account type- ▼</div> <p>Bank routing number</p> <input type="text"/> <p>Account number</p> <input type="text"/> </div>	<p>Enter bank account information:</p> <ol style="list-style-type: none"> <li>1. Nickname: can be anything you choose. For example, "Credit Union Checking"</li> <li>2. Account type: checking or saving</li> <li>3. Routing number: this should be a 9-digit number located on a voided check or available on your bank's website/app. Do not use a direct deposit slip if it says, "Do not use deposit ticket routing number for automatic payment."</li> <li>4. Account number: Triple check your account number. Once your return is filed, you cannot correct it.</li> </ol>

<div data-bbox="313 210 735 905"> <h3>ID Information</h3> <p><input type="checkbox"/> I do not wish to provide</p> <p><input type="checkbox"/> ID was NOT issued by the United States of America</p> <p>ID type</p> <div>-Please select- ▼</div> <p>Issuer</p> <div>-Please select- ▼</div> <p>ID Number</p> <div></div> <p>Issue date</p> <div> <div>MM ▼</div> <div>DD ▼</div> <div>YYYY ▼</div> </div> <p>Expiration date</p> <div> <div>MM ▼</div> <div>DD ▼</div> <div>YYYY ▼</div> </div> <p>Citizenship</p> <div>-Please select- ▼</div> </div>	<p>You and your spouse (if applicable) will be given the option to add ID information. You can choose to opt out of this option but in order to prevent identity theft, some states may choose to change the state refund option from Direct Deposit to check in the mail if ID information is not provided.</p>
<div data-bbox="211 1108 852 1285"> <p><b>Kelly, we need the adjusted gross income (AGI) from your 2020 tax return so the IRS can confirm your identity.</b></p> <p>Do you have access to your 2020 tax return?</p> <p><input type="radio"/> Yes, I have my 2020 tax return with me.</p> <p><input type="radio"/> No, I can't locate my 2020 tax return.</p> <p><input type="radio"/> No, I didn't file a 2020 tax return.</p> </div> <p>Caution: If information is entered incorrectly, the return will be rejected and you'll have to fix it before it is accepted.</p>	<p>You'll be asked to enter your 2020 tax return Adjusted Gross Income (AGI).</p> <ol style="list-style-type: none"> <li>1. If you have your return available, you'll be asked to enter your exact AGI (do not round or guess).</li> <li>2. If you filed but can't access your 2020 tax return, you'll have to mail your tax return to the IRS. This will add months to the expected time of receiving your refund.</li> <li>3. If you didn't file last year, you'll be allowed to file without it.</li> </ol> <p>If you filed using the IRS nonfiler form or GetCTC last year, mark that you filed and have your return with you. When prompted add \$1 as your AGI.</p>

<div data-bbox="228 212 820 348"><p><b>Now, create a Self-Select PIN for this year</b></p><p>Create a 5-digit PIN for this year's tax return. We'll import it for you when you file next year.</p><p>*You may be asked for this PIN in the future so the IRS can confirm your identity. We recommend making note of your PIN and keeping track of it.</p><p>Taxpayer's 5-digit PIN *</p><input data-bbox="245 306 285 327" type="text"/></div>	<p>Enter a self-selected PIN. This counts as your electronic signature. When filing next year, you can use this PIN to verify your identity to efile.</p>
<div data-bbox="272 401 774 680"><div data-bbox="305 422 337 457"></div><div data-bbox="354 426 446 451">Sign &amp; File</div><div data-bbox="305 478 743 632"><p><b>You're all set to file!</b></p><div data-bbox="402 558 646 600">SIGN AND FILE YOUR RETURN</div></div><div data-bbox="719 632 743 648"><a href="#">Edit</a></div></div>	<p>When selecting this option, you are officially submitting your return. Make sure you feel comfortable with all the information provided because you will NOT be able to edit the information after this step.</p>

## After filing your return

After submitting your tax return, you should expect to see 2-3 notifications from TaxSlayer.

1. The first will notify you that your return has been submitted (sent within minutes of submitting your return)
2. The second will notify you if your return was accepted or rejected by the IRS.
3. If your federal return was accepted and you filed a state tax return, a third message will notify you if your state return was accepted or reject

### Accepted return tips:

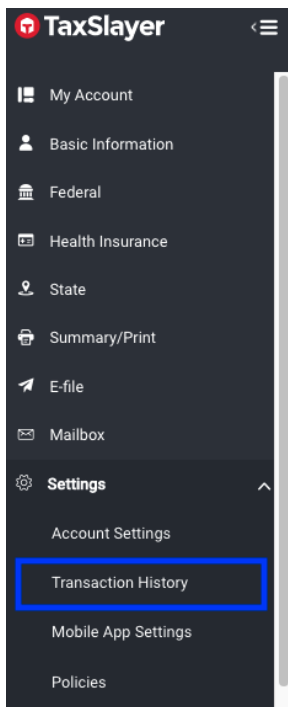
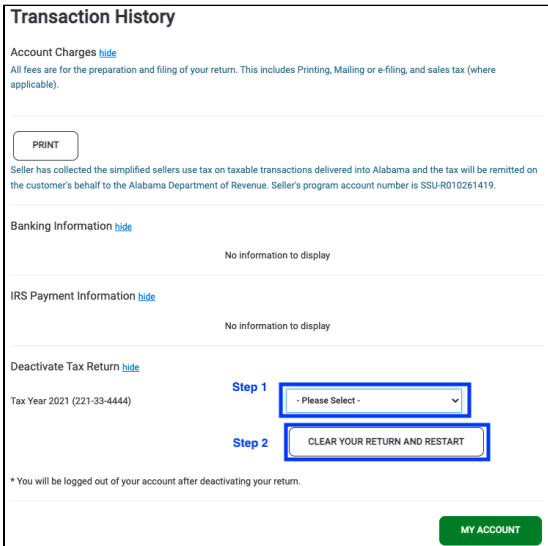
- Save a digital copy of your tax return or print the completed return for your records.
- If unable to do so, make sure to record your Filing Status, Adjusted Gross Income (line 11 on Form 1040), Federal Refund (if applicable), and State Refund (if applicable). You'll need your exact Adjusted Gross Income when you file next year. The other information is helpful when checking on the status of your refund.
- If you are due a refund, you can check your federal refund status 24 hours after e-filing at: <https://www.irs.gov/refunds>. Please note that refunds are taking longer than usual and it's hard to predict exactly when they will arrive.
  - You can usually check the status of your state refund on a state website
- If you owe taxes, make sure to pay as much as you can before the filing deadline (April 18, 2022). Interest and penalties may be applied to your balance after the deadline. Find payment information and resources at: <https://www.irs.gov/payments>

If your return was rejected, you should:

1. Log in to your account.
2. Select the My Account option on the left hand menu.
3. Click the "How to Fix?" link to open a screen that will give you the option to view the explanation of the reject code(s).
4. Read more information about resolving a TaxSlayer reject [here](#)
5. Reach out to GetYourRefund.org support if you need additional help.

## Deactivating your return

Use the following steps to deactivate your return in TaxSlayer. You may choose to do this if you decide not to use the product, if you need to switch to the free or paid version.

Screenshots	Notes
	In the left navigation panel, click on “Settings” and then “Transaction History”
	<p>Step 1: Select a reason for deactivating account.</p> <p>Step 2: Select, “Clear Your Return and Restart,” even if you aren’t planning on restarting.</p> <p>This will delete all the information from the software. If you choose to restart your information, you will have to start at the beginning.</p> <p>You cannot deactivate a return if you’ve already e-filed it and it’s been rejected.</p>