

File Myself with GetYourRefund Guide Child Tax Credit and Stimulus Only

Purpose: This guide is for those who need to file a tax return to claim their remaining Child Tax Credit or missing third stimulus payment and have no reportable income. If you need to file a full tax return, report income and claim other credits, please see this guide.

If for any reason you aren't able to complete your return using this software, go to 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

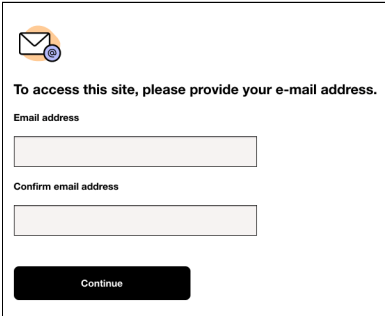
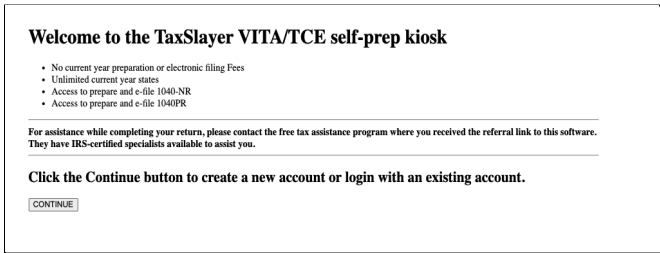
- Make sure you have the following:
 - A valid email address
 - You household's basic information
 - Amount of 3rd stimulus payment received (recorded on IRS Letter 6475 or in [your IRS account](#))
 - Learn more about the third stimulus payment and who qualifies [here](#)
 - Amount of Advance Child Tax Credit payments received (recorded on IRS Letter 6419 or in [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:
 - 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.

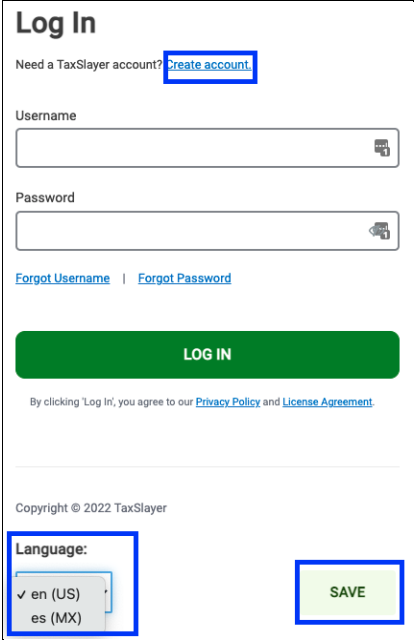
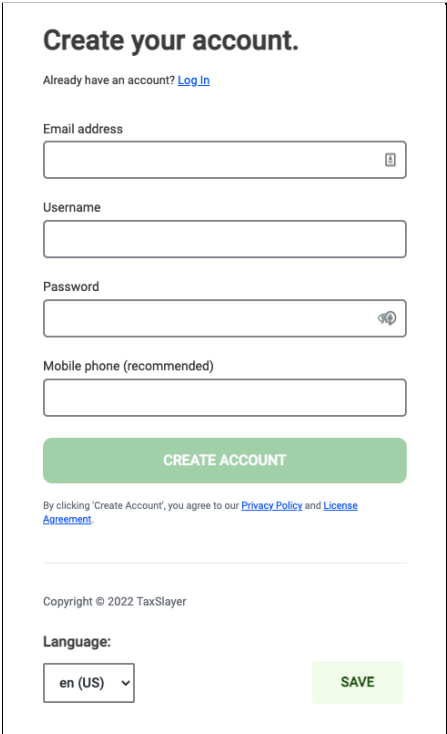
- You must start your return using a unique link at GetYourRefund.org/DIY, at MyFreeTaxes.com, or by a Volunteer Income Tax Assistance (VITA) site.

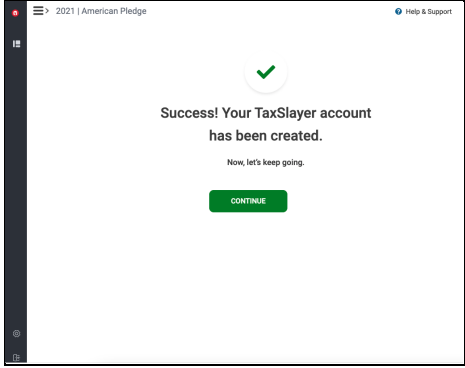
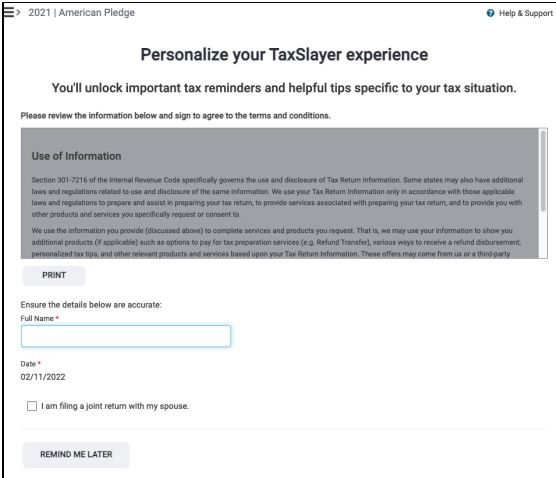
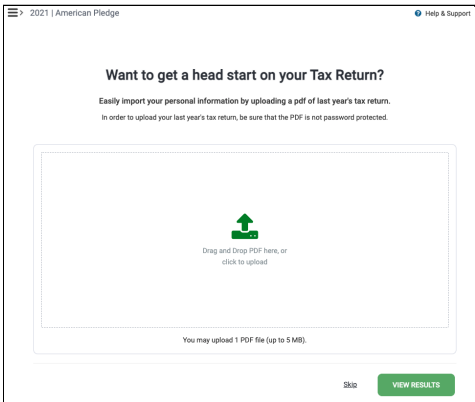
➤ Tips and Best Practices

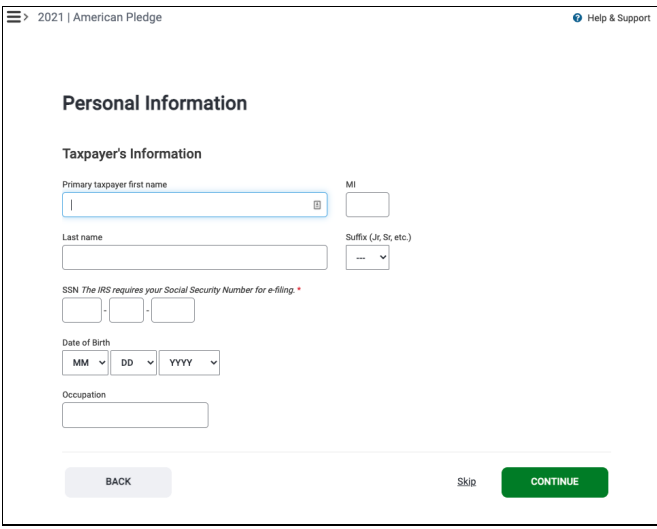
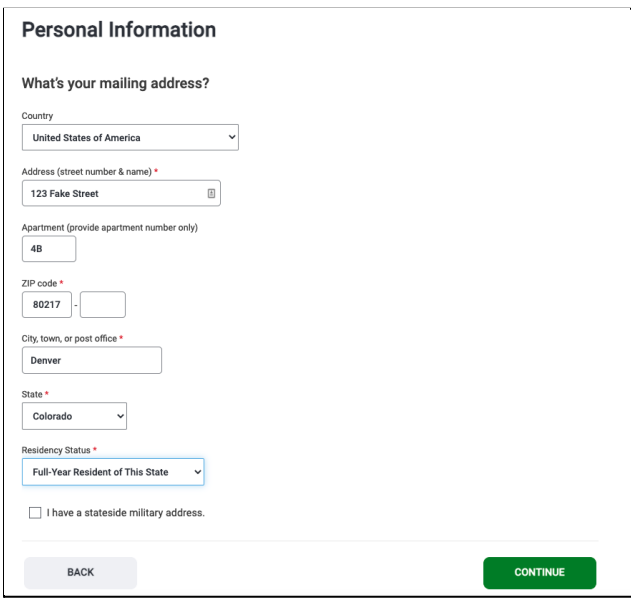
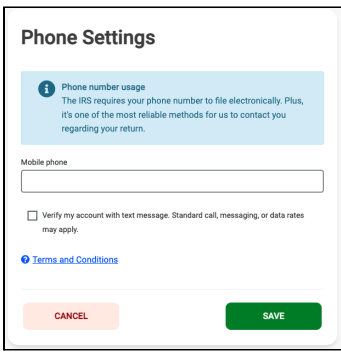
- Take your time and double check everything you’ve entered before moving on to the next page.
- Type your name and the name of your dependents exactly as it appears on the social security card or ITIN letter.
- If you have questions, you can either:
 - Click on the “Help & Support” button in the upper right corner to email our client success team
 - Or open a new tab To GetYourRefund.org and use the chat feature

Steps to Preparing a Simplified Return

	Screenshots	Notes (if needed)
1		If starting at GetYourRefund.org/DIY Enter your email twice and then click “continue” to be routed to the correct site.
2		This page ensures you are using the free product available through volunteer income tax assistance programs. Click “continue” to access the free software.

3		Click “create account” at the top. If needed, from this screen you can also switch the software to Spanish at the bottom of the page by selecting “es(MX)” and then click “save”
4		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”

5		Click “Continue”
6		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.
7		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.”

8		Make sure to enter your name and SSN or ITIN exactly as it appears on your SS Card or ITIN Letter
9		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. Select your state residency status.
10		To make logging back into the software easier, we strongly recommend checking the box to verify your account with text messages.

11	Additional Information Taxpayer's Information Check any of these that apply to you: ☐ Jane can be claimed as a dependent on someone else's return. Learn more ☐ Jane was over age 18 and a full-time student at an eligible educational institution. Learn more ☐ 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. Learn more ☐ Jane wishes to elect to use their 2019 earned income to figure their 2021 earned income credit and/or child tax credit. ☐ Jane was affected by a natural disaster during the current tax year. ☐ Jane received, sold, sent, exchanged, or otherwise acquired financial interest in virtual currency during 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. BACK Skip CONTINUE	Read each box carefully to see if the situation applies to you. NOTE: If you can be claimed as a dependent on someone else's return (someone else pays for over half of your expenses including rent, food, and medical), you do not qualify for the third stimulus payment or Child Tax Credit.
12	What's your filing status? Learn more ☐ Single ☐ Married Filing Jointly ☐ Married Filing Separately ☒ Head of Household ☐ Qualifying Widow(er) with Dependent Children ☐ Nonresident Alien Need help determining your filing status? FILING STATUS WIZARD BACK CONTINUE	If you're unsure about your filing status, use the "Filing Status Wizard" to help find your best filing status.
13	Personal Information Spouse's Information Spouse first name MI Last name Suffix (Jr, Sr, etc.) SSN - - Date of Birth MM DD YYYY Occupation BACK CANCEL	If filing Married, you'll be prompted to enter similar information for your spouse. Follow the same guidelines from above.
14	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	Answer yes if you qualify to claim a child or relative on your return. If you're unsure, ask for help at GetYourRefund.org See steps 15-20- below for more information on adding a dependent. If filing without a dependent, go to step 21

15	Dependent/Qualifying Child Information 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 here if the individual does not have an SSN, ITIN, or 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	Make sure to enter your dependent's name and SSN/ITIN exactly as it appears on their SS Card or ITIN Letter. If your dependent was born in 2022, you will not be able to claim them this year.
16	Relationship * Please select Number of months this person lived in your home during 2021 12 Note: If this dependent was born in 2021, you must select 12 months	(Dependent page continued) Choose the closest relationship the dependent is to you. Enter the number of months the dependent lived with you. 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.
17	Check any of these that apply to you: ☐ This person was over age 18 and a full-time student at an eligible educational institution. ☐ This person was DISABLED. ☐ This qualifying child is NOT YOUR DEPENDENT. Learn more ☐ You wish to NOT claim this dependent for Earned Income Credit purposes. Learn more ☐ This dependent is married. Learn more ☐ This dependent made over \$4,300 of income	(Dependent page continued) Read each question carefully and select if any of the situations apply.
18	Dependent or Qualifying Child Add a Dependent or Qualifying Child LISA SIMPSON Social Security Number xxx-xx-9898 CONTINUE	If you need to add another dependent, click on the option "Add a Dependent or Qualifying Child"

19	Advance Child Tax Credit ? Learn More Did you (or your spouse) have a principal place of abode in the U.S. for more than half of 2021? ☐ Yes ☐ No Did you (or your spouse) receive any advance Child Tax Credit payments? ☐ Yes ☐ No	If your child appears to qualify for the CTC, you'll be asked additional questions. 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. Advance Child Tax Credit payments is referring to the monthly payments sent anytime between July-December 2021.
20	Advance Child Tax Credit ? Learn More Total amount of advance Child Tax Credit payments received to date \$ Number of qualifying children taken into account in determining the annual advance amount you received for 2021 0 CAUTION: If information doesn't 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.	If you marked that you received any advance payments, you'll need to enter the exact amount you received between July-December. The amount was sent in IRS Letter 6419. If you are married filing jointly, add amounts from both letters. If you don't have the letter, or you don't think the information is correct, you can try retrieving the information by creating or logging into your IRS Account.
21	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 it, you can try retrieving it here.

22

**Personal Information:**

Primary Taxpayers:

SAMANTHA JONES
09/22/1988
111-11-1111

[edit](#)

Dependents:

Christopher Jones
Nephew
02/01/2020
222-22-2222

[edit](#)

**Contact Information:**

Mailing Address:

123 Fake Street , Apt 1
Denver, CO
Full-Year Resident of This State

[edit](#)

Phone Number:

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

[edit](#)

**Tax Information:**

Filing Status:

Head of Household

[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.

23

Add your forms quickly with Quick File

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

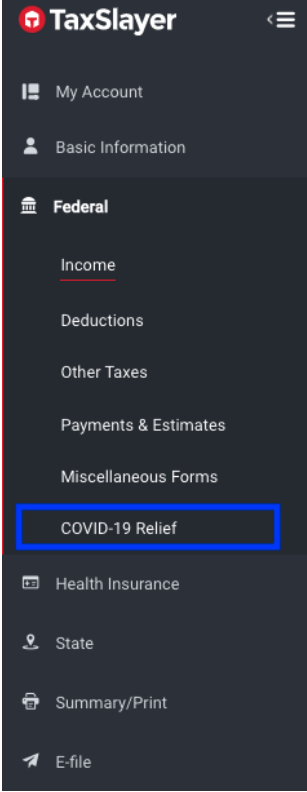
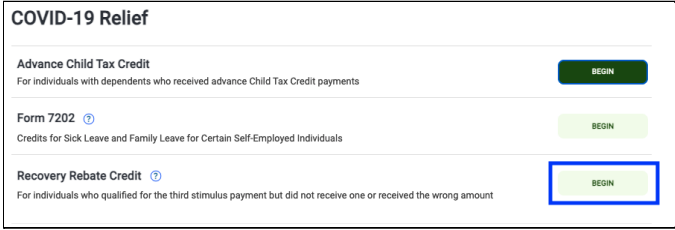
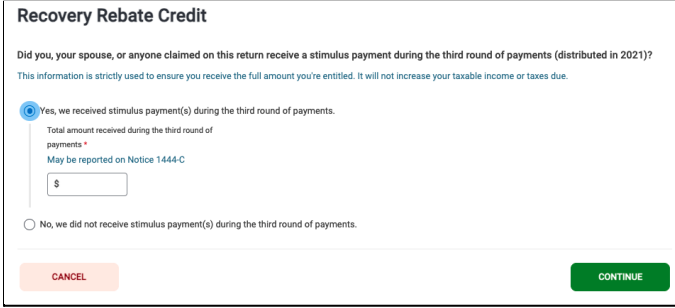


BACK

[I don't know which forms I need](#)

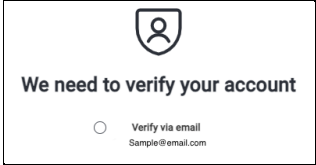
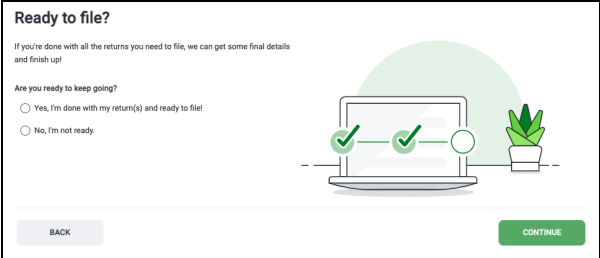
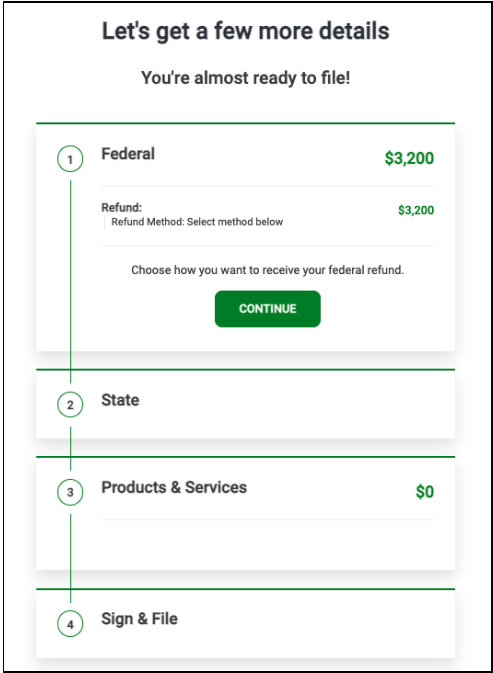
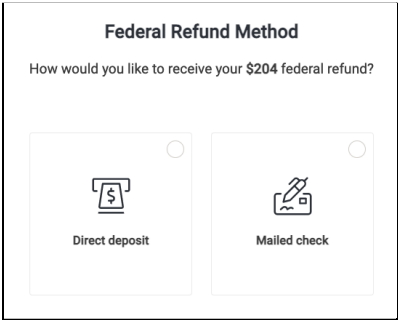
CONTINUE

Select, “I don’t know which forms I need”

24		Click on the left navigation panel and select “Covid-19 Relief” at the bottom of the federal section.
25		Select “Recovery Rebate Credit”
26	 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 missing amount

27	COVID-19 Relief Advance Child Tax Credit For individuals with dependents who received advance Child Tax Credit payments EDIT Form 7202 ⓘ Credits for Sick Leave and Family Leave for Certain Self-Employed Individuals BEGIN Recovery Rebate Credit ⓘ For individuals who qualified for the third stimulus payment but did not receive one or received the wrong amount EDIT CONTINUE	Once finished, click “continue”
28	Affordable Care Act Insurance Plans Reported on Form 1095-A Did you, your spouse, or a dependent have insurance under the Affordable Care Act in 2021? * ⓘ Learn more If so, select Yes – you must report Form 1095-A for the IRS to accept your return. If you did not have an Affordable Care Act insurance plan, select No. ☐ Yes ☐ No	Answer no if you have health coverage through Medicare, Medicaid, or an employer. ONLY answer yes if you purchased health insurance through HealthCare.gov or your state marketplace. If you had insurance through the marketplace, you must report all income.
29	NEXT UP Let's get started on your state return We'll transfer your information from your federal to your state return automatically, so this should be quick! You'll enter some state-specific information, and we'll help you find all possible tax breaks. If you qualify for a free federal return, you can file a free state return for the following states: Arkansas, Arizona, Dist of Columbia, Georgia, Iowa, Idaho, Indiana, Kentucky, Massachusetts, Michigan, Minnesota, Missouri, Mississippi, Montana, North Carolina, North Dakota, New York, Oregon, Rhode Island, South Carolina, Virginia, Vermont, West Virginia Returns for all other states are \$0.00 BACK Skip state return GET STARTED	Depending on your state, there may be additional credits or refunds available by filing a state return. If you're interested in checking for a state refund, click “Get Started.” If not, click “Skip state return”

30	Tax Return Summary  <table> <tr> <td>Total Income</td> <td>\$0.00</td> <td>▼</td> </tr> <tr> <td>Adjusted Gross Income</td> <td>\$0.00</td> <td>▼</td> </tr> <tr> <td>Tax and Credits</td> <td>\$0.00</td> <td>▼</td> </tr> <tr> <td>Total Tax</td> <td>\$0.00</td> <td>▼</td> </tr> <tr> <td>Payments</td> <td>\$3,200.00</td> <td>▼</td> </tr> <tr> <td>Refund</td> <td>\$3,200.00</td> <td>▼</td> </tr> <tr> <td>Colorado Refund</td> <td>37.00</td> <td></td> </tr> </table>  PRINT ▼ <button>VIEW RETURN</button>	Total Income	\$0.00	▼	Adjusted Gross Income	\$0.00	▼	Tax and Credits	\$0.00	▼	Total Tax	\$0.00	▼	Payments	\$3,200.00	▼	Refund	\$3,200.00	▼	Colorado Refund	37.00		This page will show your federal and state refund, if applicable. Once you're comfortable with the information, click continue to finish your return.
Total Income	\$0.00	▼																					
Adjusted Gross Income	\$0.00	▼																					
Tax and Credits	\$0.00	▼																					
Total Tax	\$0.00	▼																					
Payments	\$3,200.00	▼																					
Refund	\$3,200.00	▼																					
Colorado Refund	37.00																						
31	Don't miss out. Unlock access to personalized tax tips, new products and tools, and more ways to receive your refund. Your autograph unlocks: - Option to pay with your refund - Personalized tax tips and reminders specific to you - More ways to receive your refund - Access to new tools that make filing faster and easier - Resources to help you manage your financial situation year-round CONTINUE	You'll see this screen if you chose to skip signing the "use of information" page at the beginning.																					
32	Don't miss this. Review the legal info below, give us your autograph, and you'll unlock your personalized experience – created just for you. Please review the information below and sign to agree to the terms and conditions. Use of Information Section 301-7216 of the Internal Revenue Code specifically governs the use and disclosure of Tax Return Information. Some states may also have additional laws and regulations related to use and disclosure of the same information. We use your Tax Return Information only in accordance with those applicable laws and regulations to prepare and assist in preparing your tax return, to provide services associated with preparing your tax return, and to provide you with other products and services you specifically request or consent to. We use the information you provide (discussed above) to complete services and products you PRINT Ensure the details below are accurate: Full Name * Date * 03/15/2022 NO, THANKS	It's up to you if you'd like to receive additional promotional information from TaxSlayer but we recommend that you choose, "No, thanks."																					

33		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.
34		Confirm that you've entered all basic information and claimed remaining Child Tax Credit and 3rd stimulus.
35		The e-file menu will keep track of what part of the efile section you are in.
36		If you're eligible for a federal refund, you'll be given the option of direct deposit or receive a check in the mail.

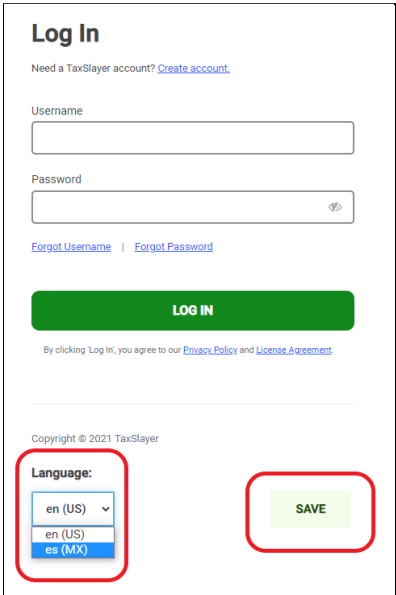
37	State Payment Method How would you like to pay your Colorado amount due of \$51? ☐  Direct debit ☐  Mailed payment ☐  Skip Now / File Later	If you're eligible for a state refund, you'll be given the option of direct deposit, receive a check in the mail, or file at a different time.
38	3 Products & Services \$0 Next, how do you want to pay for your fees associated with your return? CONTINUE	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.
39	Want to invest your refund? Do you want to put any of your refund toward savings bonds for yourself or someone else? ☐ Yes ☒ No	You'll see the option to purchase savings bonds.
40	Federal Direct Deposit Details Do you want to deposit your full federal amount into a single bank account? ☒ Yes (most common) ☐ No, I want to split my refund between 2-3 bank accounts.	You will be given the option to direct your refund to one or multiple accounts.
41	Bank Account Info Enter your account information below. Account nickname Account type -Select account type- Bank routing number Account number	Enter bank account information: 1. Nickname: can be anything you choose. For example, "Chck account" 2. Account type: checking or saving 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." 4. Account number: add account # CAUTION: Triple check all information entered. Once your return is filed, you cannot update this information and the refund may go to the wrong account.

42	Bank Accounts Add another bank canvas checking Account type Checking account BACK CONTINUE	You can add an additional bank account if you'd like to split your federal refund. Otherwise,
43	ID Information ☐ I do not wish to provide ☐ ID was NOT issued by the United States of America ID type -Please select- Issuer -Please select- ID Number Issue date MM DD YYYY Expiration date MM DD YYYY Citizenship -Please select-	You and your spouse (if applicable) will be given the option to add ID information. You can choose to opt out of this option
44	Kelly, we need the adjusted gross income (AGI) from your 2020 tax return so the IRS can confirm your identity. Do you have access to your 2020 tax return? ☐ Yes, I have my 2020 tax return with me. ☐ No, I can't locate my 2020 tax return. ☐ No, I didn't file a 2020 tax return. Caution: If information is entered incorrectly, the return will be rejected and you'll have to fix it before it is accepted.	You'll be asked to enter your 2020 tax return Adjusted Gross Income (AGI). 1. If you have your return available, you'll be asked to enter your exact AGI (do not round or guess). 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. 3. If you didn't file last year, you'll be allowed to file without it. 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.

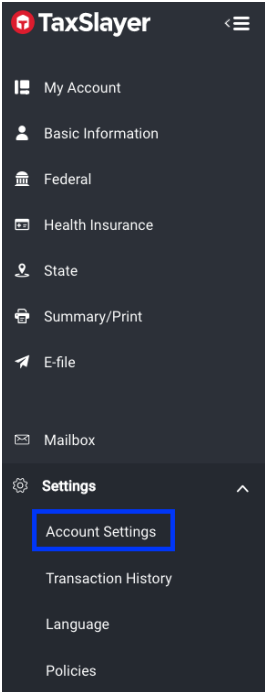
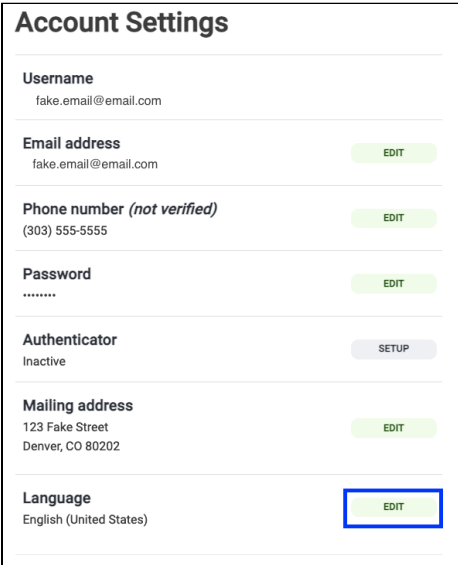
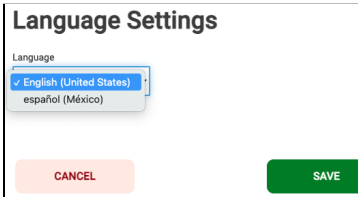
45	SAMANTHA, which type of tax return did you file last year? Look for the form name in the top-left corner of your federal return. ☐ 1040 ☐ 1040NR ☐ 1040X ☐ 1040SR	If you filed using the IRS non-filer form or GetCTC.org in 2021, select “1040.”
46	Enter your 2020 Adjusted Gross Income (AGI)  Located on last year's tax return (Line 11 Form 1040) This amount is used by the IRS to confirm your identity. It must be correct for your return to be accepted. Primary taxpayer - SAMANTHA JONES 2020 Adjusted Gross Income (AGI) * Located on line 11 of your 2020 form 1040. Round to the closest dollar if your AGI includes cents. \$0	If you filed using the IRS non-filer form or GetCTC.org in 2021, enter \$1. If you filed a full tax return, enter your exact AGI. The page will be shown twice, to confirm the information entered is accurate.
47	Now, create a Self-Select PIN for this year Create a 5-digit PIN for this year's tax return. We'll import it for you when you file next year. *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. Taxpayer's 5-digit PIN *	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.
48	 Sign & File You're all set to file! SIGN AND FILE YOUR RETURN Edit	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.

How to switch the software to Spanish

To switch an account to Spanish before creating an account:

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

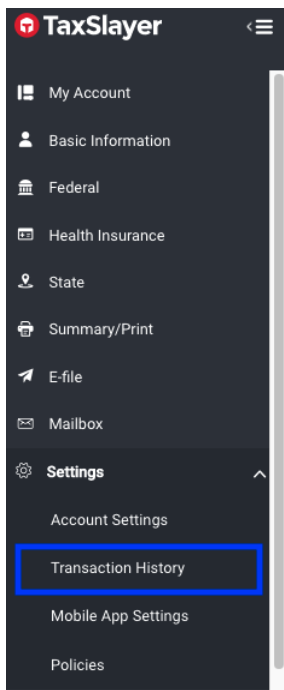
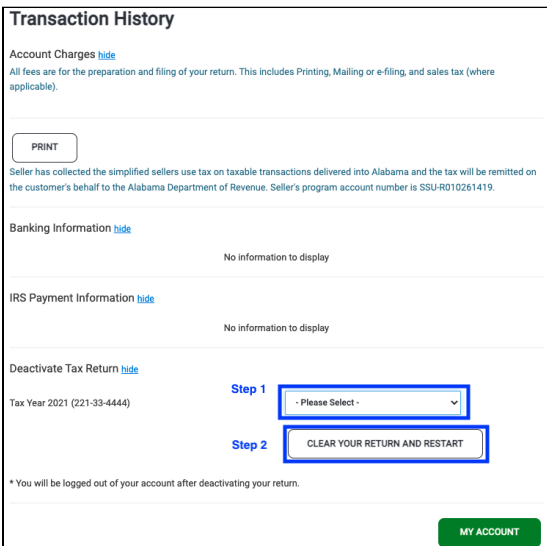
1. From the left navigation panel, select “Account Settings”	2. At the bottom of the page, click “edit” next to language.	3. Select “español (México)” and click save.
		

After filing your return

- After submitting your tax return, you will receive 2-3 notifications from TaxSlayer.
 - The first will notify you that your return has been submitted (sent within minutes of submitting your return)
 - The second will notify you if your return was accepted or rejected by the IRS.
 - 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
 - You can check the status of your return by logging back into your account.
- Accepted return tips:
 - Save a digital copy of your tax return or print the 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:
 - Log in to your account.
 - Select the My Account option on the left hand menu.
 - 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).
 - Read more information about resolving a TaxSlayer reject [here](#)
 - 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”
	Step 1: Select a reason for deactivating account. Step 2: Select, “Clear Your Return and Restart,” even if you aren’t planning on restarting. This will delete all the information from the software. If you choose to restart your information, you will have to start at the beginning. You cannot deactivate a return if you’ve already e-filed it and it’s been rejected.