

Instructions for Electronic Filing



From Instructions for Form 1040.

General Information

E-filing your return will electronically send your federal tax return to the IRS. Your tax return will then be either "Accepted" or "Rejected". If your tax return is accepted it has been filed with the IRS. If your tax return is rejected it has not been filed. If rejected, the issues in the tax return which caused the reject should be addressed and the tax return should be e-filed again or filed by mail.

Required Information

To activate the "E-File Now" Button on Step 2. E-File Your Tax Forms You must complete all 5 sections of Step 2 entering any data that applies to you.

Section 1: W-2s, 1099-Rs, and W-2Gs

Add any W-2s, 1099-Rs, or W-2Gs you received. Select the "Add" button next to the items you have to enter. Enter each item separately and be sure to include the employee's name (this is **mandatory** to activate the E-File Now button) and all 'required' information noted on the form. For instance, if you received two W-2s select the Add button for W-2s and enter in the information exactly as it appears on your first W-2. Then select the "Add" button again and enter the information from your second W-2, exactly as shown on the second W-2. Do this for each W-2, 1099-R, and W-2G that you received.

Section 2: Enter Federal Withholding Not Reported Above

It is very important to make sure that the federal withholding entered on your main form agrees to the details entered in Section 1.

- **Box A:** Open each W2, W2G, or 1099R entered in Section 1. Write down the amount of your federal withholding you entered on each form. Total the amounts and enter that total in Box A. Important: do not look at your actual paper forms for these amounts – refer to the amounts you entered in the program.
- **Box B:** Enter in any other withholding that you are reporting on your main 1040 form which is not included in the forms entered in Section 1.
- **Box C:** Select 'Do the Math' to total the amounts in Boxes A and B.
- **Box D:** This is the amount you entered on your main 1040 form. This amount needs to agree to the amount in Box C in order to activate the 'Efile Now' button.

Section 3: Verifying Your Identity

There are two ways to verify your identity:

A. 2012 Adjusted Gross Income – Enter the amount from your 2012 Form 1040, line 37; or Form 1040A, line 21; or Form 1040EZ, line 4. If married filing joint enter both taxpayer and spouse amounts. These amounts should match exactly what is on your 2012 tax return.

If you are married filing jointly for 2013 and you filed jointly

in 2012 with the same spouse, use the same AGI directly from the 2012 return for both taxpayer and spouse.

If married filing jointly for 2013 but not for 2012 with the same spouse, use the separate AGI from each person's 2012 return.

Example: Joe and Mary got married on 3/01/2013. They are filing a joint return for 2013. Mary filed a joint return with Fred in 2012. Mary and Fred's 2012 Form 1040, line 37 amount is \$25,450. Joe filed single in 2012 and his Form 1040 line 37 amount is \$62,200. The amount that should be entered here for Mary is \$25,450 and for Joe is \$62,200.

B. Electronic Filing PIN – If you do not have your 2012 Adjusted Gross Income or your Prior Year PIN (from 2012) then you can obtain a new electronic filing PIN from the IRS web site. Go to www.irs.gov/Individuals/Electronic-Filing-PIN-Request or call 1-866-704-7388. Enter the Electronic Filing PIN in the space indicated "Electronic Filing PIN".

Section 4: Signing This Year's Return

- **Entering a Current Year PIN** – Both Taxpayer and Spouse (if Married Filing Joint) will need to enter a unique 5-digit (numbers only) person identification number (PIN). This number cannot be all zeroes.
- **Entering Date of Birth** for both Taxpayer and Spouse (if Married Filing Joint).
- **E-Filing Date** - Enter the date you will be e-filing your return, usually the current date.
- **E-Mail Address** - You need a valid email address to e-file. This is how you will receive status on your filing. You must enter the address twice and both addresses must exactly match.
- **Disclosure Statement** - You must read the disclosure statement and check the "I agree" box.

Section 5: Payment Options

If you have a balance due you can:

- **Pay by Electronic Withdrawal** - enter the routing number (contact your bank if you are unsure), account number, account type, the date to make the withdrawal from your account (this date can be any business day prior to the due date of the return), and agree to the Electronic Withdrawal Disclosure statement.
- **Pay by Check** - print form 1040V and mail it in with your check to the IRS.
- **For all other payment options** – Go to the IRS website at www.irs.gov/Payments for details