

my Tax Return

First Scenario for *my* Tax Return

- Simple Return
 - Return Dashboard – Taxpayer can view the status of most data required and track progress of return preparation.
 - Prepare My Return - Taxpayer verifies details of the return, determines if it is complete, and runs diagnostic process. If diagnostics are “clean”, status of return is changed to “Ready to File”.
 - File My Return – Taxpayer reviews return, verifies bank accounts and signs the return. If Single, Married filing Separate or Head of Household filing status, return can be filed immediately. If Married filing Joint filing status, once both spouses have signed the return with no changes, the return can be filed.

My Home

Help Center

Security Settings

My Profile

My Tax Information

Tax Account

My Tax Return

My Tax Benefi

Return Dashboard

Prepare my Return

Download Return Data

File my Return

Filing Information
 Filing Status: Confirmed
 Personal Exemptions: Confirmed
 Dependents: Need Confirmation
 Health Insurance: Need Confirmation

Tax Return Stage
 Ready to File: Incomplete
 Returned Signed:
 Returned Signed Spouse:
 Returned Filed:
 Return Accepted:
 Return Amended:

Tax Form: 1040

Source	Description	Source	Status
Filing Information			
My Profile	Address, Phone Number, Email	My Information	
	Dependents, Exemptions, Credits	My Relationships and Dependents	
Income			
7	W2	Wages, salaries, tips, etc.	Mt. Hood Commu World Address LL The Big Company
8a	1099-INT	Taxable Interest	USB
8b	1099-INT	Tax-Exempt Interest	St
9a	1099-DIV	Ordinary Dividends	C
9b	1099-DIV	Qualified Dividends	C
1	1099-G	Taxable refunds, credits, or offsets of state	State
19	1099-G	Unemployment Compensation	State of Oreg
Adjustments			
33	1098-E	Student loan interest deduction	Big Bank
			150.00 150.00

Tax Form: Schedule A
 Link to

The Return Stages are tracked so that the taxpayer knows what actions are needed to meet their filing requirement.

Where's My Refund? >

Go to Security Settings

Security settings allows you to update your: options, and reset

Dashboard shows the status of filing activities needed to complete the return.

Filing Information

Filing Status: **Confirmed**
 Personal Exemptions: **Confirmed**
 Dependents: **Need Confirmation**
 Health Insurance: **Need Confirmation**

Tax Return Stage

Ready to File: **Incomplete**
 Returned Signed:
 Return Signed by Spouse:
 Returned Filed:
 Return Accepted:
 Return Amended:

Tax Form: 1040

Source	Description	Source	Status				
Filing Information							
My Profile	Address, Phone Number, Email	> My Information					
	Dependents, Exemptions, Credits	> My Relationships and Dependents					
Line No.	Source	Description	Source	Link to Source	Prior Year	Current Year	Difference
Income							
7	W2	Wages, salaries, tips, etc.	Mt. Hood Community College	>	24,000.00	25,000.00	1,000.00
			World Address LLC	>	9,000.00	12,000.00	3,000.00
			The Big Company	>	2,000.00		-2,000.00
8a	1099-INT	Taxable Interest	USBank	>	20.00	50.00	30.00
8b	1099-INT	Tax-Exempt Interest	State of Oregon Bonds	>	80.00	100.00	20.00
9a	1099-DIV	Ordinary Dividends	Charles Schwab	>	0.00	200.00	
9b	1099-DIV	Qualified Dividends	Charles Schwab	>	0.00	200.00	
1	1099-G	Taxable refunds, credits, or offsets of state	State of Oregon	>	560.00	500.00	
19	1099-G	Unemployment Compensation	State of Oregon Employment Division	>	2,000.00		
Adjustments							
33	1098-E	Student loan interest deduction	Big Bank	>		150.00	150.00
Tax Form: Schedule A							

Dashboard lists all tax documents from the past year compared to current. This may alert taxpayer if something is missing this year or if there has been a delay in processing.

Where's My Refund? >

Dashboard identifies tax documents that have arrived electronically at the IRS. Links show source documents. This eliminates need to send W2's, 1099's, 1098's etc. to taxpayers.

My Home Help Center Security Settings

My Profile My Tax Information My Tax Account **My Tax Return** My Tax Benefits

Return Dashboard **Prepare my Return** Download Data Return

Form 1040 U.S. Individual Income Tax Return

For the year Jan. 1–Dec. 31, 2015, or other tax year beginning

Your first name and initial Last name
Katherine A **Portland**

If joint return, spouse's name & initial Last name
Don A **Portland**

Home address (number and street). If you have a P.O. box, see instructions.
1300 N Hall Street

City, town or post office, state, and ZIP code. If you have a foreign address, also complete
Portland, OR 97212

Foreign country name Foreign

Filing Status

1 ☐ Single 4 ☐ Head of household (with qualifying person). (See instructions.) If the qualifying person is a child but not your dependent, enter this child's name here.

2 ☒ Married filing joint return (even if only one had income)

3 ☐ Married filing separate return. Enter spouse's SSN above and full name here. 5 ☐ Qualifying widow(er) with dependent child

Check only one box.

Exemptions

6a ☒ Yourself. If someone can claim you as a dependent, do not check box 6a.

b ☒ Spouse.

c Dependents:

(1) First name Last Name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) <input checked="" type="checkbox"/> If child under age 17 qualifying for child tax credit (see instructions)	Boxes checked on 6a and 6b. No. of children on 6c who:
John Portland	XXX-XX-3234	SON	<input checked="" type="checkbox"/>	• lived with you
Susan Portland	XXX-XX-4234	DAUGHTER	<input checked="" type="checkbox"/>	• did not live with you due to divorce or separation (see instructions)
				Dependents on 6c not entered above

d Total number of exemptions claimed Add numbers on lines above **3**

The taxpayer can scroll through the return and review it to verify that it is ready to file. The taxpayer will not be itemizing.

- Select Financial Account
- Third Party Delegate
- Run Diagnostics

My Home

Help Center

Security Settings

My Profile

My Tax Information

My Tax Account

My Tax Return

My Tax Benefits

Return Dashboard

are my

ad Return Data

File my Return

Payments	64	1,600
	65	
	65a	2,706
		1,577
		1,914

Refund	74	7,797
	75	7,797
	75a	7,797

Amount You Owe	76	
	76a	
	77	
	78	
	79	

Third Party Designee

Sign Here

Paid Preparer's Use Only

Print/Save Your Return

Download your Return

The taxpayer can select from bank accounts set up in "My Profile". Third Party Delegates can be added to the return. Lastly diagnostics are run to insure there will be no filing errors. Since there is a refund, they'll select bank accounts.

Select Financial Account

Third Party Delegate

Run Diagnostics

The taxpayer can print their return, create report file or download the data from their return.

My Home

Settings

My Profile

My Tax Return

My Tax Benefits

Return Data

File my Return

[Review](#)

[Start Over](#)

[Return](#)

The first account selected will be the Checking account.

Financial Accounts for Refund

7,797.00

Financial Account	Type of Account	Amount
Select Our Checking Account US BANK NA Account Number: x0012 (Last 4 Digits)	Checking	7,797.00
Select Portland's Joint Savings US BANK NA Account Number: x0024 (Last 4 Digits)	Savings	
Select Katherine's Regular IRA Bank of America Account Number: x0015 (Last 4 Digits)	IRA	
Select Katherine's Roth IRA MyRA Account Number: x0015 (Last 4 Digits)	Roth IRA	
Select My Tax Account: to be applied to 2016 estimated taxes.	My Tax Account	

Update Financial Accounts

Amount will default to the entire refund. If a second account is chosen, the balance in the first will be reduced. The amount will always be calculated.

My Home

Settings

My Profile

My Tax Return

My Tax Benefits

Return

Return Data

File my Return

The taxpayer decided to put part of the refund into their Savings Account. The first account selected will adjust. Form 8880 will be added to the return.

[Review](#) [Start Over](#) [Return](#)

Refund

7,797.00

Type of Account Amount

Select

Our Checking Account
US BANK NA
Account Number: x0012 (Last 4 Digits)

Checking

2,797.00

Select

Portland's Joint Savings
US BANK NA
Account Number: x0024 (Last 4 Digits)

Savings

5000.00

Select

Katherine's Regular IRA
Bank of America
Account Number: x0015 (Last 4 Digits)

IRA

Select

Katherine's Roth IRA
MyRA
Account Number: x0015 (Last 4 Digits)

Roth IRA

Select

My Tax Account: to be applied
to 2016 estimated taxes.

My Tax Account

The taxpayer can also direct refund to their 2016 Tax Account for estimated taxes.

Update Financial Accounts

My Home

Help Center

Security Settings

My Profile

My Tax Information

My Tax Account

My Tax Return

My Tax Benefits

Return Dashboard

Prepare my Return

Download Return Data

File my Return

Payments	64	Federal income tax withheld from Form 1040	64	1,600
	65	Excess payments & payments on account	65	
	66a	Refund	66a	2,706
	67	Non-refundable credits	67	1,577
	68	Refundable credits	68	
	69	Excess refundable credits	69	1,914
	70	Refundable credits	70	
	71	Excess refundable credits	71	
	72	Refundable credits	72	
	73	Excess refundable credits	73	
	74	Refundable credits	74	7,797
	75	Excess refundable credits	75	7,797
	76a	Refundable credits	76a	7,797

Run Diagnostics

Sign my Return

File my Return

Once submitted, the status of the return could be followed in the Return Dashboard.

The taxpayer does a final review of the return. She then selects "Run Diagnostics". Once that is successful, she selects "Sign My Return" so that it is electronically signed with a time/date stamp. Since her spouse has also signed the return, it can be filed.

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature: Katherine A Portland
 Date: 3/27/2016
 Your occupation: Instructor
 Spouse's signature: Don A Portland
 Date: 3/27/2016
 Spouse's occupation: Customer Service Rep

Paid Preparer's Use Only
 Firm's name: _____
 Firm's address: _____
 Firm's EIN: _____
 Phone no.: _____

Second Scenario for *my* Tax Return

- Complex Return
 - Return Dashboard – Taxpayer can view the availability of most data to see progress for the return.
 - Download Return Data – Taxpayer can download their tax data to the tax software package of their choice or give access to download the data to their paid preparer.
 - Preparer transmits the return to the IRS.
 - File My Return – Taxpayer reviews return, verifies bank accounts and signs the return. If a Single, Married filing Separate or Head of Household filing status, return can be filed. If Married filing Joint filing status, once both spouses have signed the return with no changes, then the return can be filed.

Filing Information

Filing Status: Confirmed
 Personal Exemptions: Confirmed
 Dependents: Confirmed
 Health Insurance: Confirmed

Tax Return Status
 Ready to File:
 Return
 Return
 Return

As with a simple return, the Dashboard will be used to determine when tax documents, personal information, and dependents, have been updated. Since the taxpayer will be itemizing deductions, they will "Download Return Data" so they can use tax software to prepare the return.

Tax Form: 1040

Source	Description	Source				
Filing Information						
My Profile	Address, Phone Number, Email	My Information				
	Dependents, Exemptions, Credits	My Relationships and Dependents				
Line No.	Source	Description	Source	Link to Source	Prior Year	Current Year Difference
Income						
7	W2	Wages, salaries, tips, etc.	Mt. Hood Community College		24,000.00	25,000.00 1,000.00
			World Address LLC		9,000.00	12,000.00 3,000.00
			The Big Company		2,000.00	-2,000.00
8a	1099-INT	Taxable Interest	USBank		20.00	50.00 30.00
8b	1099-INT	Tax-Exempt Interest	State of Oregon Bonds		80.00	100.00 20.00
9a	1099-DIV	Ordinary Dividends	Charles Schwab		0.00	200.00 200.00
9b	1099-DIV	Qualified Dividends	Charles Schwab		0.00	200.00 200.00
1	1099-G	Taxable refunds, credits, or offsets of state	State of Oregon		560.00	500.00
19	1099-G	Unemployment Compensation	State of Oregon Employment Division		2,000.00	-2,000.00
Adjustments						
33	1098-E	Student loan interest deduction	Big Bank			150.00 150.00

Tax Form: Schedule A

Line No.	Source	Description	Source	Link to Source	Prior Year	Current Year	Difference
----------	--------	-------------	--------	----------------	------------	--------------	------------

[How do I update my contact info if I have special needs as a blind or visually impaired user?](#)

Go to Security Settings

Your security settings allows you to view or update your:

- security options,
- password, and
- password reset questions.

Download Return Data
to my computer

Share my Return Data
with my preparer

Firm: H&R Block
Name: Ronald A Number
Phone: 503.555.1212
Email: Email:
Ronald.A.Number@hrblock.com
PTIN: S63051111
Email: Preparer EIN: 930584541
Document: Certifications: Enrolled Agent, CPA

Share Return Data

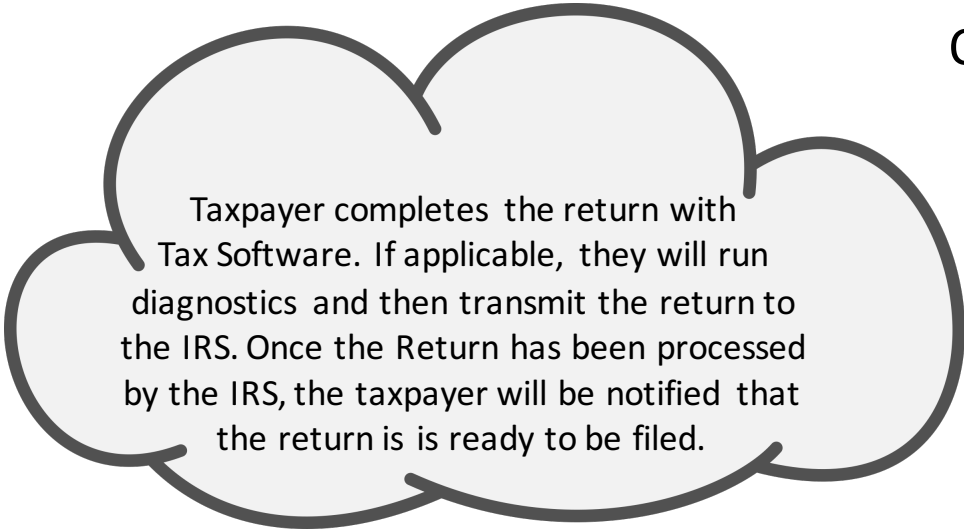
If taxpayer selects "Download Return Data to my computer", they will receive a confirmation when it has successfully completed.

? How do I request a replacement Social Security card?

If taxpayer selects "Share my Return Data" the contact information for the preparer will be displayed so that the taxpayer can confirm the selection. Once the preparer has downloaded their data, the taxpayer will receive a notice.

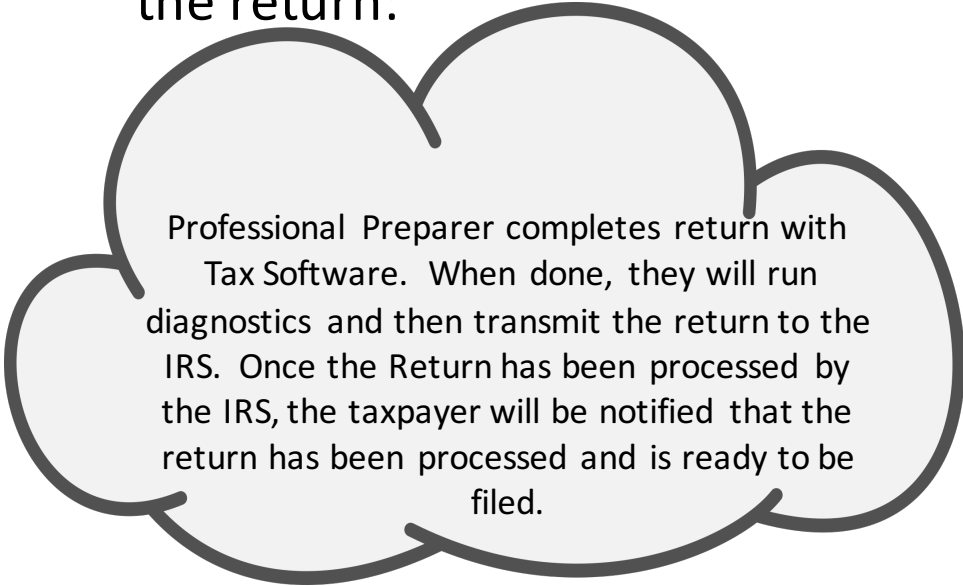
Taxpayer prepares the return:

OR



Taxpayer completes the return with Tax Software. If applicable, they will run diagnostics and then transmit the return to the IRS. Once the Return has been processed by the IRS, the taxpayer will be notified that the return is ready to be filed.

Professional Preparer prepares the return:



Professional Preparer completes return with Tax Software. When done, they will run diagnostics and then transmit the return to the IRS. Once the Return has been processed by the IRS, the taxpayer will be notified that the return has been processed and is ready to be filed.

My Home

Help Center

Security Settings

My Profile

My Tax Information

My Tax Account

My Tax Return

My Tax Benefits

Return Dashboard

Prepare my Return

Download Return Data

File my Return

Payments	64	Federal income tax withheld from Forms W-2 and 1099	64	1,600
	65	2015 estimated tax payments & amount paid	65	
	66	(EIC)	66a	2,706
			67	1,577
			68	
			69	1,914
			74	7,797
			75	7,797
			76a	7,797

Amount You Owe

79

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see instructions)?

Designee's name

Phone no.

Personal Identification no.

Sign Here

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Joint return?

See instructions.

Keep a copy for your records.

Your signature

Date

Your occupation

Spouse's signature, if a joint return, both must sign.

Date

Spouse's occupation

Customer Service Rep

Paid Preparer's Use Only

Int/Type preparer's name

Preparer's signature

Date

Firm's name

Firm's address

Firm's phone no.

www.irs.gov/form1040

The taxpayer does one final review of the return. They run one final set of set of diagnostics. Since it is ready, they select "Sign My Return" so that it is electronically signed with a time/date stamp. Since their spouse has also signed the return, it can be filed.

The return has been filed.

The filing status of the return can be reviewed on the Return Dashboard.

Run Diagnostics

Sign my Return

File my Return

my Tax Benefits

Scenarios for *my* Tax Benefits

- Taxpayer will be provided data on tax benefits already included in their return.
- They will be able to investigate potential benefits and savings.
- Suggestions will be made based upon the data context in the return.
Examples could be:
 - Education credits based upon the 1098T if not at the maximum for the credit
 - Retirement Savings potential
 - Double benefit if company 401K has company matching
 - If there is a Shared Responsibility Payment could there be exemptions?

[My Home](#)
[Help Center](#)
[Security Settings](#)
[My Profile](#)
[My Tax Information](#)
[My Tax Account](#)
[My Tax Return](#)
[My Tax Benefits](#)

My Current Tax Benefits			
Source			
Line 47	Tax on original return		853
Income that is deferred from taxes			
W-2 Line 12D	401K Contribution at work	\$1,000	
Income that is not taxed			
Line 8b	Tax-exempt Interest	100	
Line 33	Income Taxed at a lower Rate		
Adjustments			
	Student Loan Interest Deduction	150	
	Total income not subject to tax	1,250	
	Tax Rate:	10.00%	
	Tax Savings	125	125
Tax Credits			
Line 49	Child and Dependent Care Credit	230	
Line 51	Retirement Savings Contributions Credit	200	
Line 423	Child Tax Credit	423	
Refundable Credits			
Line 66a	Earned Income Credit	2706	
Line 67	Additional Child Tax Credit	1577	
Form 1095-A	Total Premium Tax Credit	4638	
	Total Credits:	9774	9774
	Total Savings Plus Credits		9899
	Total Tax Benefits less Tax Due		9,046

Potential Benefits

This year:
Consider a larger contribution to an IRA Account (Line 32). Tax savings on \$600 would increase your refund by over \$500.

Would you be eligible for an exemption from the Line 61 Individual Responsibility Payment of \$54?
[Health Coverage Exemptions](#)

Next year:

If your company provides funds for retirement, you may be able to provide a matching contribution.

Tax Benefits will show current benefits and offer suggestions for potential benefits based upon return data.



Questions?

The Interactive Tax Assistant can help

Get a Response to Your Tax Question