

PRE-DECISIONAL | NOT FOR DISTRIBUTION

Total income summary

New screens. This will be the last screen in the Income section: a summary of what was entered. There is one version for if the taxpayer has entered income items and a second version if the user didn't enter anything. Note: there is an already existing knockout for people who entered no income or had only nontaxable income plus don't qualify for credits, so that scenario is already accounted for. The #2 screen here is just one more reminder to the user if they go all the way through the income section with no entries added.

1. total-income-summary

NEW

Name: total-income-summary

show to: taxpayers who reported income

Header

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Let's review your total income.

Jobs

Taxable amount

\$<amt>

Unemployment compensation

Taxable amount

\$<amt>

Interest income

Taxable amount

\$<amt>

Alaska Permanent Fund Dividend (APFD)

Taxable amount

\$<amt>

Dependent care benefits

Taxable amount

\$<amt>

Health Savings Accounts

Taxable amount

\$<amt>

Retirement income

Taxable amount

\$<amt>

Social Security benefits

Taxable amount

\$<amt>

Taxable amount may change

Total income

= <\$amt>

This total isn't necessarily the amount that will be taxed.

In the Deductions section, we subtract any deductions you may qualify for this year to figure out how much of your income is taxable.

Continue

This is a dynamic list. DF will show an entry in this list only if the TP reported any income of that type – even if the taxable amount of what they entered ends up being \$0.

This summary shows an initial calculation for the taxable amount of Social Security benefits

We use [Worksheet 1 in IRS Publication 915](#) to calculate how much of your benefits are taxable.

The taxable amount shown on this summary for Social Security benefits is only an initial calculation because it doesn't reflect adjustments you may qualify for (like the educator expense deduction and the Health Savings Account (HSA) deduction).

After checking your adjustments in the Deductions section, we complete the calculation. We figure your taxes using the completed calculation for the taxable amount of your Social Security benefits.

https://www.irs.gov/publications/p915#en_US_2023_public9000293181

2. total-income-summary-none-reported

NEW

Name: total-income-summary-none-reported

show to: taxpayers who reported NO income

Header

breadcrumb

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You didn't report any income.

If you have income you didn't report, go back to the [Income sources](#) section to make sure your income is supported in Direct File. Then, add your income.

You must report all of your income to the IRS, even if you're not able to do so with Direct File.

Continue

URL for Income sources: can we link them back to the income sources section? I think this will be the [detailview_auth_ssm_perfect-open-db-app.cloud.gov/dt/finance-view/flow/income/income-sources](#)