IRS

freefile
Fillable Forms
User's Guide

Free File Fillable Forms
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Free File: Seventy percent of taxpayers have an Adjusted Gross Income (AGI) of $64,000 or less and are eligible for easy-to-use, brand-name software. Find the right software product for you at irs.gov/freefile. Free File Fillable Forms has no age, income or residency restrictions; however:

If you are not comfortable with completing a paper return, using only the forms and instructions as a guide to file a correct return, this program is not for you.

Before Getting Started

Know the program operates yearly from the beginning of the filing season through October 15 each year. All account information is erased after October 15 and you will not have access to it.

1. **Review** the Forms and Limitations page. Although this program supports most forms, if you need an unsupported form, you will not be able to efile your return. The page also provides form and program limitations that may prevent you from efiling your return.
2. **Check** the Computer Requirements. Using non-recommended browsers and operating systems can result in form display problems, form calculation problems and problems with the information you have entered.
3. **Familiarize** yourself with the self-help webpages, which contain answers to the questions and problems most taxpayers have. Easy navigation to the help you want begins with the Help link on our main page.

What You Will Need: Have the following on hand before you start.

- Social Security Numbers for all persons on your tax return
- Birth dates for all persons on your return
- The Adjusted Gross Income (AGI) from last year's federal tax return. See Section 3: Verify Your Identity, if you do not know last year's AGI.
- A valid email address

Create Your Account

1. Select "Start Fillable Forms Now" from the Free File landing page.
2. Once at the Free File Fillable Forms landing page, select "Start Free File Fillable Forms."
3. Even If you used this program in previous years, if you have not created an account for the current tax year, you need to "Create an Account" for this year.
4. Complete all the required information and select "Create Account"
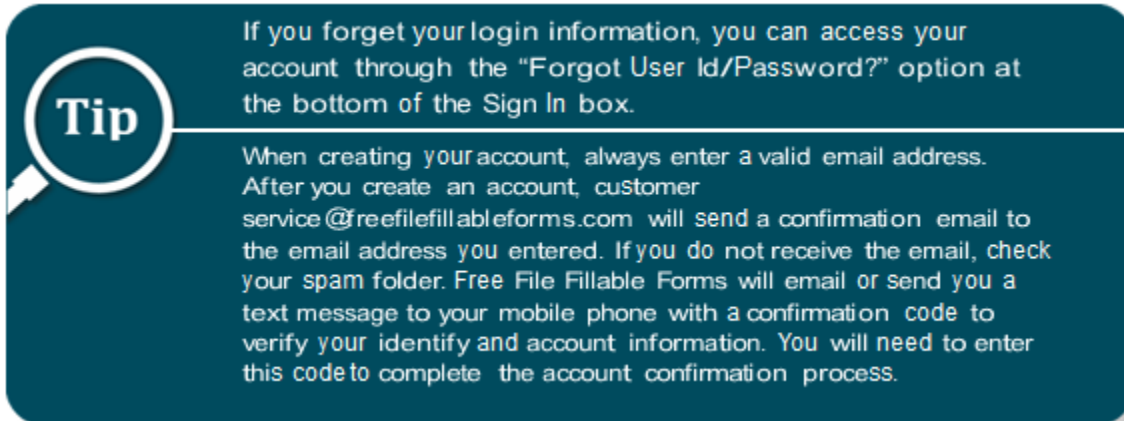
USE CAUTION: If you make a mistake typing in your email address or phone number, you may not be able to recover your account. Make sure you correctly type in your email address and phone number.

To recover a Password or User ID, you must be able to receive email at the email address you entered and/or receive information (call or text) from the phone number you entered.

5. A User ID requires a minimum of four visible keyboard entries, containing no spaces or commas. The green check only indicates that the UID provided is not already stored in the database. If an invalid User ID is entered and "Create Account" is clicked, an "Invalid Character" message appears at the top of the page.

6. A confirmation email is sent from ***customerservice@freefilefillableforms.com*** to the email address used to create the account. Use the email to verify your email address. If you do not receive this email, [view this information](#).

Select Your Main Form

Make your main form selection- Form 1040, Form 1040A or Form 1040EZ. A brief description of each main form, and who can use them, is available at the time of selection. **If you select the wrong main form, switching to another main form will erase all of your tax information.**

To file an extension (Form 4868), select a main form, then select the "File an Extension" button. Enter your name, address and Social Security Number, and then complete the rest of the form. Transmit the extension by completing the efile section below the form information.

Selecting Areas to Enter Information

Moving within the Forms — Use your mouse or pointing device to select icons, buttons, checkboxes, menu items and to select a space to enter information. Use the scroll bar to view more of the form you have selected.

Entering your Information — Placing your mouse or pointing device over an entry area may display text about what to enter. You may also use the tab key to navigate through the form. To move backward to a previous area, hold down shift and then push the tab key.

1. View the Tip and Cautions below for Browser Back Button, Negative Numbers (Losses) and entering Zeros.

2. Never add forms that do not apply to your tax situation.

Types of Information Areas on the Forms

Manual Entry Fields — Select an area to enter information and a blue box will surround it, with a blinking vertical line to indicate where you are entering your information.

Drop-Down Menu (or pick-list) — A down symbol ▽ indicates these area. The items to select are limited to acceptable information. If you don't understand the choices, the area probably doesn't apply to you. If a menu item you expect to see is not listed, consult the form instructions, review the Forms and Limitations page and review the Line-by-Line instructions for the program.

Calculated Fields — These areas will calculate when you enter the required information in other parts of the return and select "Do the Math."

- Sometimes you can manually enter a number into a calculated field if you have not yet completed the form that transfers information to the calculated field. However, once that form is completed, its information will transfer to the calculated field.

> **Tip**
>
> When you try to enter a number into a calculated area, your cursor's pointer will turn into the "**DO NOT**" symbol. 🚫 And, this message, "**This field is automatically calculated for you**" will also appear below your cursor.
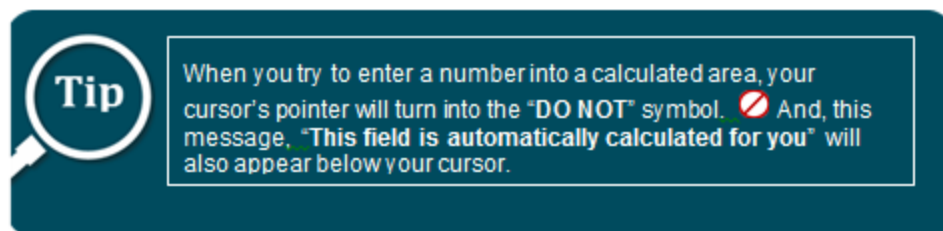
- You cannot override a calculated field unless you change the data used to make the calculation.
- Calculated field information may come from a completed field on any form you have added.
- Calculated fields sometimes require you to enter something into the "additional information" areas before they will calculate.

Radio Buttons — These are small round circles similar. You "Fill in" the circle to provide information. You may only select one radio button from the associated group.

To fill in the circle:

- Use your mouse- Place your cursor on the circle and "left click" or Tap the touchpad on your laptop
- Selecting another radio button from the group will also de select your previous selection
- To de-select a radio button without making another selection from the group, place your cursor on the radio button and "double click."

Tip If you select direct deposit for your refund, make sure to select the radio button for the type of account, either checking or savings.

Checkboxes — These are similar to radio buttons, except you may select multiple checkboxes within the group.

Additional Information Areas — There are times when you are instructed to enter additional information on the form. You may enter this additional information into the small gray areas on any given line.

The form instructions will state you should enter and the order you enter the information. In most cases, you will enter a description of the item and a corresponding amount, in that order. In the amount areas, you may only enter numbers. Always consult the form instructions before entering information in these areas.

Placing your cursor in the area may provide information on what you should enter. Never enter any information in these areas unless instructed to. Extraneous zeros or entering such things as "N/A" will cause your return to reject. **Reviewing the Line-by-Line instructions may also assist with these areas**.

> **Description Area** — Some description areas have a drop-down menu to assist entering acceptable information. Most taxpayers do not need to enter information in these areas. If you do

not recognize the menu items, enter nothing and review the form instructions that pertain to your tax situation.

Amount Area — Some amount areas do not have a corresponding description area. Never enter an amount, leaving a corresponding description area blank.

See the Example Below: Line 21 has two additional information areas: (1) A description area and (2) an amount area.

This example also shows a calculated field with the "Do Not" symbol and the notice that line 21 is a calculated field.

For line 21 to calculate, you must enter the "Other Income" amount in the appropriate area and select "Do the Math." In the designated area, you must also enter a corresponding description for the other income, otherwise, the return will reject.

Attaching Statements — This program does not support attaching statements. If you are instructed to attach a statement to clarify an entry, you will not be able to efile your return.

Tabs, Links, Buttons and Icons

This is how you open forms, get help, change your account information, save your information and submit (efile) your return.

1. **STEP 1** — The active default page when you begin a tax return. The blue color indicates the tab is active. You will be on STEP 1 when completing forms and schedules, except for income documents (W-2, W2-G and 1099-R).

2. **STEP 2** — Select this tab to add income documents (W-2, W2-G and 1099-R) and to begin the process of filing your return electronically (efile). Review STEP 2 in its entirety beginning on page X.

3. **File an Extension** — Opens Form 4868 and the efile process for filing the extension. **Note**-The program does not support this Form 2350, *Extension for U. S. citizens and resident aliens living abroad, file this form*.

4. **Help** — Opens a new browser and takes you to an IRS page that will assist with how forms are supposed to function. The Line-by-Line instructions page provides information on the most

commonly used forms. The [Forms and Limitations](#) page provides information on what is supported, when it's available and problems you may encounter when using the form.

5. **IRS Publications** — Opens a new browser and takes you to an IRS page where you can view and download forms, instructions and publications. You cannot attach and efile forms and schedules downloaded from the IRS page.
6. **Interactive Tax Law Assistant** — Takes you to a tax law resource page, which walks you through a series of questions and provides you with responses to tax law questions.
7. **Update Your Account** — Takes you to a page where you can update the information you entered to establish your current account.
8. **Sign Out** — Saves all the information you have entered thus far and logs you out of your account.
9. **Save** — Saves all the information you have entered thus Far. Note, if you save and any of your information disappears, you have a browser compatibility issue. See the [Computer Requirements](#) page.
10. **Print Return** —Open a new browser window and displays your tax return as a pdf file for printing. You may also use this function to save a copy of the return to your computer. Any missing forms or schedules indicate the missing documents were not completed. Missing documents will not transmit to the IRS with the return. Some documents (W2, W2-G and 1099-R) are not supposed to print with the return.
11. **Add/View Forms** — Allows you to add, view and delete forms and schedules. Selecting a form makes it the active form. Added forms are stored in "My Tax Forms." Forms seen in "My Tax Forms" are not necessarily completed forms and may not transmit with your return. (See "Print Return," above.).
12. **Start Over** — Allows you to select another main form. Selecting another main form permanently deletes the information you have entered on the present main form.
13. **Check efile Status** — Opens a page where you can enter information about yourself and determine the status of your efiled return.
14. **FAQs** — Opens a new browser and takes you to Frequently Asked Questions about the program.
15. **Instructions for This Form** — Opens a pdf file in a new browser window, which contain the IRS form instructions for the form you are currently viewing.
16. **Do the Math** — Calculates all fields on the form, currently viewed, which have the required elements entered to make the calculation. It also saves your work. We recommend you save your work often.
17. **Delete This Form** — Deletes the form currently viewed. You can add the same form later; however, you will have to re-enter all the information again.
18. **Print This Form** — Opens a new browser window and displays the form, currently viewed, as a pdf file. You can print and/or save the form to your computer from this window.
19. **Done With This Form** — Closes the form currently viewed and returns you to your main form. It also "Saves" your work. The button is not functional when viewing the main form. Select the STEP 2 tab if you have completed your return and want to begin the efile process.

Add and Delete Forms

You cannot add every form and schedule in the two methods described below.

- Add income documents (W2, W2-G and 1099-R) from STEP 2.
- You *must* add some forms and schedules only from a "parent" form. For example: You may only add Form 4562 from its "Parent" Schedule C, E and F

Check the [Forms and Limitations](#) page to see all supported forms and the dates they become available.

Add Forms — Two methods:

1. **Add/View Forms Icon** – Select the "Add/View Forms" icon to open the "My Tax Forms" list.

    a. Select "Add a Form" from the bottom of the "My Tax Forms" box.

    b. Scroll the list of forms the select the form you want

    c. Some forms have "Taxpayer" and "Spouse" versions. Select the correct version.

    d. You cannot add some forms/schedules with this method

> **Tip**
>
> Income documents (W 2, W 2G, and 1099 R) can be added on the Add Income Documents/Step 2 Tab (see the next section). Once added, you may view and edit using Add/View Forms (method 2).
>
> To add the same form more than once, use either method above to select the form. Once added, a box will open showing your previously added form. Select the "Add Another Copy" button at the bottom

2. **Add Button** – Select the "Add" button for the form, if there is on for it on the viewed page.

    a. "Add" buttons are usually placed conveniently on the line that will accept the information from the added form.

    b. Not all supported forms and schedules have "add" buttons

Deleting Forms — Two methods:

Delete this Form Button – If the form you want to delete is displayed, delete it by selecting the "Delete this Form" button, at the bottom of the page.

Add/View Form Icon – Select the "Add/View Forms" icon from the top of the page, which opens "My Tax Forms"

Select Your Form ☒

▯ W-2 - Wage and Tax Statement - Copy 1
▯ W-2 - Wage and Tax Statement - Copy 2
▯ W-2 - Wage and Tax Statement - Copy 3

Add Another Copy ←

a. Select "Delete a Form" to bring up the list of forms

b. Scroll the list and click on the form you want to delete

c. Select "Yes" from the pop-up box, asking if you are sure you want to delete the form.
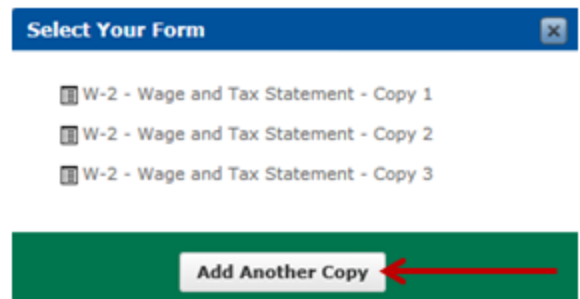
STEP 2 – Preparing to E-File Now

STEP 2 has five sections. Three sections (2, 3 and 4) prepare your return for submission to the IRS and everyone must complete these sections. The remaining two sections are optional and depend on whether you have income documents (W2, W2-G or 1099-R) or have a balance you want to pay electronically.

Section 1: Add Income Documents — Enter the information from your income documents (W-2, W2-G and 1099-R). Use the "Add" button for each type of income document. If you have more than one W-2, W2-G and 1099-R, return to STEP 2 Section 1 and select the "Add" button again, for each of the paper documents you received from the employers/payors.

Section 1: Add your W-2, 1099-R and/or W-2G information

W-2s, 1099-Rs and W2Gs are the only tax forms you need to add to your return.

Complete one electronic W-2 for every W-2 you received. If you received more than one W-2, choose the **Add** button to enter each one separately.

Complete one electronic 1099-R for every 1099-R you received. If you received more than one 1099-R, choose the **Add** button to enter each one separately.

Complete one electronic W-2G for every W-2G you received. If you received more than one W-2G, choose the **Add** button to enter each one separately.

Click the Add button for each Form W-2 you received	Add
Click the Add button for each Form 1099-R you received	Add
Click the Add button for each Form W-2G you received	Add

- If you haven't any W-2, W2-G and 1099-R forms, you can skip Section 1.

- Enter the information and amounts exactly as it appears on your paper documents.

- There is no "Add" button for any other 1099 forms, such as SSA-1099, 1099-RRB, 1099-MISC, etc. It is not necessary to enter theses other 1099 documents as you do for the 1099-R.

Section 2: Reconcile Your Federal Withholding — You must reconcile the amount of federal withholding you claim on your main form with the federal withholding you entered for the income documents you added in STEP 2 Section 1 above.

Remember, this is about **FEDERAL WITHHOLDING** only!

A. Look at your paper W-2, W2-G and 1099-R documents, total the federal withholding and enter that amount in Box A

B. Look at all your other income documents that show federal withholding, total the federal withholding from those documents and enter that figure in Box B.
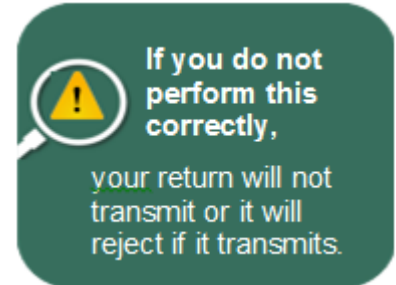
C. If you completed Form 8959 and there was a federal withholding amount on line 24, that number will transfer to Box C.

D. Box D calculates when you select "Do the Math"

E. Box E reflects the amount of federal withholding you entered on your main form

Boxes D and E must match to proceed. If they do not match, you have made a mistake in the amount of federal withholding you entered on your main form or the amounts you entered in Boxes A and B are wrong. Perform the reconciliation again.

Section 2: Add your withholding information

Make sure the amounts on Lines D and E match, and make sure to fill in all applicable lines.

A Total the federal withholding amounts on all W-2s (Box 2), 1099-R's (Box 4) and W-2Gs (Box 4) and enter the total on Line A.

B Enter on Line B the total amount of other withholding that you are reporting on Form 1040, line 64 that is not reported on a form in Section 1 above. These amounts come from documents such as SSA-1099, 1099-DIV, 1099-MISC, 1099-B, other 1099s or Schedule K-1s.

C Enter federal withholding from line 24 of Form 8959, Additional Medicare Tax.

D Total federal withholding (Lines A through C) .

E Total federal withholding from Form 1040, Line 64.

Enter the appropriate **FEDERAL WITHHOLDING** in boxes A and B

The amounts in boxes D and E must match

Note: If you are filing Form 1040A or Form 1040EZ, you cannot file Form 8959; therefore, Boxes C and D must match

Section 3: Verify Your Identity — The IRS needs to authenticate that you are the taxpayers whose Social Security Numbers appear as the Primary and Secondary (if married filing jointly) on this return.

Tip Do Not Guess Your AGI.

If you do not have last Year's Tax Return. Use "Get Transcript" or call 1800-829-1040 to get your prior year AGI.

Enter last year's AGI in the space provided. If you are filing jointly and you filed jointly with the same spouse last year, the AGI for the Taxpayer and Spouse will be the same. If last year's return was not filed jointly with your current spouse, the AGI must be taken from the separate returns.

If you did not file a return last year, enter "0" for your AGI.

If you do not know what last year's AGI is, get help retrieving it. Alternatively, if you can remember the 5-digit signature PIN you used last year to sign your return, you can enter it in the space provided. If you cannot obtain the correct AGI, you must mail in your return to the IRS. See the instructions for a mailing address

Section 3: Verify your identity

You must enter **A** last year's Adjusted Gross Income (AGI), or **B** last year's five-digit self-selected signature PIN.
If you're filing a joint return, both taxpayers must follow this process.

A Look at last year's federal tax return and enter your AGI in the space provided below. Look for your AGI on line 37 of the Form 1040, line 21 of the Form 1040A and line 4 of the Form 1040EZ.
- If you are filing Married Filing Jointly this year with the same spouse you filed with last year, "Taxpayer" and "Spouse" will have the same AGI.
- If you did not file a return last year, enter a zero in the "Taxpayer" AGI space.
- If your spouse did not file a return last year, enter a zero in the "Spouse" AGI space.
- If you don't have or can't remember last year's AGI, use the IRS Get Transcript link: Go to:**https://www.irs.gov/individuals/get-transcript**

Taxpayer   Spouse (if filing jointly)

Last year's AGI:

OR

B Enter last year's self-selected signature PIN. If you do not have or do not remember your PIN, skip this step and follow the instructions in step A above.

Taxpayer   Spouse (if filing jointly)

Last year's five-digit self-selected signature PIN:

Section 4: Signing the Return — You need to provide the following information and, if filing jointly, the Spouse needs to provide information also.

a) Enter your email address, twice

b) Enter the date you are transmitting your return (Today's Date)

c) Enter an optional cell phone number

d) Make up a five-digit Signature PIN and enter it into the designated area. It can be any five numbers except 00000 or 12345.

e) Enter your Date of Birth. The date format is MM/DD/YYYY. If you are the Primary taxpayer on the return, are under age 16 and have never filed a federal return before, you must mail in your return or use a professional tax preparer who is an Authorized IRS efile provider.

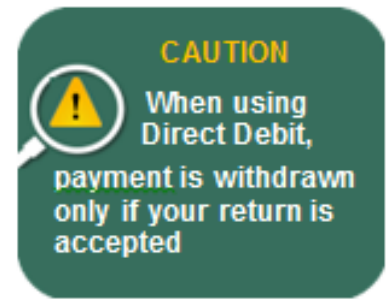To increase your protection against fraud, complete the areas for driver's license or state issued ID, if you have those documents.

Section 4: Add your electronic signature

To sign your return electronically, add your email, today's date and cell phone number here. If you're filing jointly with your spouse, you'll each add your own PIN and date of birth.

A   Email address (for confirmation email)

    Re-enter email address (must match)

B   Today's date (mm/dd/yyyy)   mm/dd/yyyy

The Primary Taxpayer must complete all of the areas indicated

C   Cell phone number

                                Taxpayer   Spouse (if filing jointly)

                                                                     If married and filing jointly, the SPOUSE must also complete the areas indicated

D   You can choose any 5 numbers for your PIN.
    (Don't use 00000 or 12345)

E   Date of birth (mm/dd/yyyy)   mm/dd/yyyy   mm/dd/yyyy

F   Driver's license or State issued ID number   **For increased FRAUD PROTECTION, complete the state Drivers License / ID sections, if you have those documents**

G   Driver's license or State issued ID state

H   Driver's license or State issued ID issue date   mm/dd/yyyy   mm/dd/yyyy

I   Driver's license or State issued ID expiration date   mm/dd/yyyy   mm/dd/yyyy

If you are receiving a refund or if you are not paying a balance you owe with Direct Debit, scroll past Section 5 "Payment to the IRS" to reach the "Continue to E-File" button.

Remember to print and check your return for errors before transmit your return to the IRS. Once the return is transmitted and accepted by the IRS, you cannot efile the return again. See Amended Returns.

Section 5: Paying a Balance Owed — If you have a refund coming to you, do not enter any information in this section.

If you owe a balance on your return, you can pay by

    A. Direct Debit (Pay by Electronic Funds Withdrawal)

    B. Check

    C. Direct Pay

You can also explore other payment options from the IRS Payment webpage https://www.irs.gov/payments

CAUTION

When using Direct Debit, payment is withdrawn only if your return is accepted

Direct Debit (Electronic Funds Withdrawal) – This method is the most convenient payment method and linked to your accepted return. To make a direct debit payment

    1. Enter your Routing Number

    2. Enter your Account Number

    3. Select either the Checking or Savings Radio Button

    4. Enter the withdrawal date (format MM/DD/YYYY)

Section 5: How to pay your taxes due

If you're getting a refund, you can skip this section.

Here are three options for payment. You may have the money electronically withdrawn from your bank account, pay by check or use IRS Direct Pay.

A **Pay by electronic withdrawal**

The IRS can accept your payment by direct debit from your bank account. This does not apply to estimated payments.

Enter the required information below and agree to the disclosure statement.

Routing number **1**

Account number **2**

Type: Checking ◯ **3**

Savings ◯

Date to make withdrawal **4** mm/dd/yyyy

Note: If you're getting a refund, leave information above blank.

Daytime phone number **5**

1200

PAY TO THE ORDER OF _____ $ [ ]

_____ DOLLARS

FOR **1** _____ **2** _____

⑆122105278⑆ 6724301068⑈ 1200⑈

ABA Routing Number   Account Number   Check Number

Electronic withdrawal disclosure statement

I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH Electronic Funds Withdrawal (Direct Debit) entry to the financial institution account indicated for payment of my federal taxes owed on this return and the financial institution to debit the entry to this account.

I further understand that this authorization may apply to subsequent federal tax payments that I direct to be debited through the Electronic Federal Payment System (EFTPS).

In order for me to initiate subsequent payments, I request that the IRS send me a personal identification number (PIN) to access EFTPS.

This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization.

To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date.

I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment.

☐ **I agree to pay by electronic withdrawal** **6**

B **Pay by check** ◯ Click if you e-file your tax return and mail a check or money order to the IRS for payment.

If you choose to pay by check, make sure to print your Form 1040V and mail it in with your tax return and your payment.

C **Pay with IRS Direct Pay** You may also pay electronically from your bank account with IRS Direct Pay by following this link:

https://www.irs.gov/Payments/Direct-Pay

Continue to E-File

5. Enter a ten-digit daytime phone number. **NOTE**: If you have a **foreign phone number**, enter the first ten-digits of the phone number

6. Check the "I Agree" checkbox

7. Print and check your return before you select the E-File Now button

Check – Print Form 1040V (Payment Voucher) and make sure the payment is postmarked by the due date of the return. Payment addresses are in the 1040 instruction book.

Direct Pay – Pay the balance on your return and make estimated tax payments. https://www.irs.gov/payments/direct-pay

Review Your Return

Prior to selecting the "E-File Now" button, print and review your return for completeness and accuracy. Once you transmit the return and the IRS accepts it, the only way to correct mistakes is to mail in an amended return, Form 1040X.

Print the Return –

- Select the "Print Return" icon at the top.

- Check your printed return against the list of forms in "My Tax Forms"

    - Missing forms are not complete

    - Some forms are not supposed to print, such as Form 1040ES, W-2, W2-G and 1099-R

Reviewing Incomplete Forms –

- Select the Add/View icon and select the form missing from your printed return

- Review the form and it's instructions for obvious omissions that pertain to your tax situation

- Review the Line-by-Line instructions for the form for help on how the lines on a form are supposed to function and idiosyncrasies of the form

- Make your correction(s)

- Select "Do the Math" and proceed with STEP 2

Continue to E-File Button

The button is at the bottom of STEP 2, Section 5. Select the "Continue to E-File button after you have completed all of your forms in STEP 1 and all of the required elements of STEP 2.

After selecting the button, you will receive a message that the E-Filing Information is Incomplete or a message to complete the CAPTCHA and continue to e-file.

If you receive the incomplete message, you must resolve the problem before you are able to transmit the return. See Transmission Problems.

If no transmission problems are detected, complete the CAPTCHA and submit.

Once you submit, the "Ready to E-File" screen appears. Check the "I Agree" checkbox and select the "Transmit my Return" button.

After transmission, you will receive a final screen stating your return has been transmitted and to look for an email notification about Acceptance or Rejection of your return.

Note: After successful transmission of your return, you will also receive an email confirming the successful transmission of your return. **DO NOT** confuse this email with the email stating whether your return has been accepted or rejected.

Print Your Return for Your Records

After your return has transmitted and you have received notification that the IRS has accepted your return, print a copy of your accepted return for your records.

IMPORTANT – The Free File Fillable Forms program shuts down every year, on October 20. After that date, the developer erases all information from the server and you will not have access to your account or return information.

In addition to saving a paper copy, you may also want to save a "soft copy" of your return on your hard drive or portable storage device. To save a soft copy, use the "Print Return" icon. When the new browser opens with your tax return in pdf format, use your browser's "File > Save as" function to save your soft copy.

Filing an Extension (Form 4868)

Form 4868 – After creating an account, select a main form and then select the "File an Extension" button. Enter your name, address and Social Security Number, and then complete the rest of the form. Transmit the extension by completing the efile section below the form information. If you are making a payment with the extension, make sure you enter your payment amount on line 7.

Form 2350 – Not Supported

Help with Free File Fillable Forms

Free File Fillable Forms relies on taxpayers using web-based self-assist resources to discover solutions encountered with the program. Help follows two paths, (1) Rejected Returns and (2) Functional Issues. Although not a part of Free File Fillable Forms support, this section will also address questions about accepted returns.

Rejected Returns –

The Internal Revenue Service will either accept or reject the return after you transmit (submit) it. You will receive an email from customer_service@free_file_fillable_forms.com when the IRS rejects your return. This email will lists the reason for rejection (error) and provide a link to use to resolve the rejection issue.

A reason for rejection (error) has two parts:

1. The Business Rule Number and explanation
2. The Xpath

It is important to follow the instructions on the Rejection Help page.

- Copy and paste both parts of the rejection into the search box
- If you have multiple errors, search one error at a time

Functional Issues (All Issues except Rejections) –

If we discover a software issue that prevents you from completing or submitting (transmitting) your return, we will place the issue in the table on the Functional Issues page. The table will describe the problem and provide a "Tentative Fix" date.

1. The Line-by-Line Instructions page provides information on how the most commonly used forms work. Many times, taxpayers believe they have encountered a software "bug" or "glitch" because they are not familiar with program idiosyncrasies. This page is your best resource for determining how something is supposed to work or why it is not working the way you believe it should.

2. Free File Fillable Forms supports most, but not all forms and schedules. Some of the supported forms and schedules have limits, which may prevent you from completing or transmitting your return. The Forms and Limitations page will let you know

   a. What forms and schedules are available
   b. When the forms and schedules will become available
   c. Limitations that may prevent you from successfully completing the return

3. Our Account Issues page provides basic information on the most common problems taxpayers have with creating or accessing their Free File Fillable Forms account. Many times, the issue is caused when attempting to create or access an account using an unsupported browser or operating system. Using non-recommended operating systems and/or browsers will expose you the risk of experiencing technical issues that you may not be able to resolve later, without switching to a recommended browser. Always comply with the recommendations on our Computer Requirements page.

   a. Error 500 Code - This is a website server error. The error is generally temporary (15 minutes or less). Once the host notices and corrects the error, you can access your account and continue working on your return. If you continue to receive the error, repeat the event that caused the error to occur and reply with the following:

      - The error message, including the ID number
      - The date and time the error occurred (please note your time zone)
      - The user ID and email address you are using for the account

- Your computer operating system
- The browser and browser version you are using

b. Error 503 Code - When you experience Free File Fillable Forms account access issues and/or have difficulty creating your account and experience a "Code 503" error message, please read the following list of items to check, review, and/or correct in order to proceed:

- Close all other programs and browsers other that the browser you are using to access your account.
- Clear your browser's history before your next attempt to access or create your account.
- Create/use a *one-word* User ID of at least 4 characters (i.e., my.emailadress@ustaxes.com). Do not use of diacritics, accent marks, language-specific punctuation and quotation marks. A valid email address is acceptable.
- Create/use a one-word, 8-character password with at least one number and one special character (i.e., #, $, *, !). Do not use of diacritics, accent marks, language-specific punctuation and quotation marks.
- Double check the accuracy of the security question selected & the accuracy/spelling of the answer you provide.
- Ensure that ALL required CREATE ACCOUNT fields have been filled-in before pressing the CONTINUE button.
- When prompted, be sure to print the account login information, record your User ID, password and security question answer exactly as entered for your records.

c. Changing Account Information - Click the 'Update Account' link on the upper right navigation bar.

d. Deleting Your Data - If you have not successfully e-filed your return, you can delete your data by selecting the Start Over option and then sign out of the return. This will erase any tax return information you entered.

e. Not receiving expected email - If you did not receive a confirmation email when you created an account, it is possible your spam filter is blocking the email. Check your spam folder and look for an email from customer_service@freefilefillableforms.com

f. Not receive an acknowledgement email **-** The email should arrive within 2 hours after you successfully transmit your return. It takes longer the closer you get to April 15. If you do not receive this email within 24 hours, do the following:
- Make sure you are checking the same email account you entered in Step 2, (the E-file Your Tax Forms screen) when you submitted your tax return
- Check your spam filter or junk mail folder for email from customer_service@freefilefillableforms.com
- If you still have not received an email you can check your return status by selecting the "Get E-file Status" link on the left hand navigation, just under the FAQs link on the Free File Fillable Forms.com landing page. Enter your Social Security Number and zip code that was on the e-filed return. If the program shows no status, you have not successfully transmitted your return.

4. Transmission problems occur after you select the "Continue to E-File" button and prevent submission of your return to the IRS. They are difficult to diagnose because the software is not currently able to pinpoint where the error has occurred and the error can occur anywhere in the STEP 2 process or in the name and address section of your return. Transmission errors may also occur because you are using an incompatible browser or it could be as simple as you're your

internet connection stopped working. Review the [Transmission Problem](#) page for a list of things to check.

5. Printing, Display and Miscellaneous Forms issues

    a) When you experience Display Issues, you need to review and comply with the recommended [Computer Requirements](#). A Print Issue could be a computer requirement issue, an incomplete form or simply a form that is not supposed to print. (See [Review Your Return](#)) The [Print and Display Issues](#) page lists some of these issues and their likely causes.

    b) Entered Information Disappears**-** If you are using a recommended browser and are using the browser's auto-fill or add-on, such as Incognito or In Private, turn them off and then perform these steps:

        - Access the form and line causing the problem

        - Highlight the entry field causing the problem, hit your "Delete" key, then, with your cursor still in the area, hold down the "Backspace" key for five seconds.

        - Save and exit the program

        - Close all browser sessions except one and clear you cache and cookies

        - Access your account and complete the form

        - Delete the form if this does not resolve the problem

    c) Negative numbers (or losses) **-** We apologize for the lack of consistency regarding the paper instructions and entering negative numbers in Free File Fillable Forms. Generally, you precede a negative number with the minus sign (-). There are some instances where you may calculate a negative number, but the lowest acceptable figure for the line is a zero. Always review the form instructions regarding the entry of a zero or negative number

    d) Worksheets are not part of the functional program. Print, fill them in and enter your results on the form asking for the worksheet calculation

    e) Identity Protection PIN (IP PIN) Free File Fillable Forms supports the IP PIN for the Taxpayer and Spouse on the return. If the IRS sent you letter with an Identity Protection PIN (IP PIN), enter that six digit PIN in the area to the right of the "Spouse's Occupation" (the lower right corner of your 1040, 1040A or 1040EZ form).
        - Make sure you enter the IP PIN into the correct area for the "Taxpayer" or "Spouse", otherwise, your return will reject.
        - An IP PIN for a Dependent is *not supported*. If your dependent has an IP PIN, you will have to mail in your return.

    g) Information Transfers Forms have a hierarchy relationship. (Example: Form 1040 is the "parent" form to Schedule D and Schedule D is the "parent" to Form 8949) Figures from your "parent" form may not transfer to subordinate forms unless you complete the parent form to the point where you should add the subordinate form. The completed information on the parent form would include all the personal information on your Form 1040, 1040A or 1040EZ (Name, Address, SSN, Filing Status, Exemptions and Dependents)

    h) Writing in information – The instructions for some lines may tell you to write certain information somewhere on a line. Use the small grey areas, on the line, for this. See the User's Guide

    i) Calculations
        - Calculated Fields **–** Some lines calculate for you. If you can manually enter a number on a line, do not expect it to calculate for you. To get a number to calculate on the line, you

must first complete the lines, which should be included in the calculation and then select "Do the Math." If a line is calculated, you cannot override the calculation

- Incorrect Calculation **-** Calculations derive from information entered on other lines, so make sure that information is correct. Once you have verified the miscalculation is not a function of your entries, contact us about the issue.

6. International / Military / Foreign Filers – Review our [International Filer's page](#) for assistance with particular forms and entering addresses.

Accepted Returns –

Once the IRS has accepted your return, you cannot interrupt acceptance processing. Processing usually takes 21 days or less. Any issue that arises after you receive an email that the IRS has accepted your return is an issue between you and the Internal Revenue Service.

- Incorrect Bank Routing Number or Account Number – You should contact your bank if you entered the correct routing number and the account number is incorrect to determine if the incorrect account number belongs to someone else. If the IRS determines it cannot direct deposit the refund, you will receive a paper check. Call 1800-829-1040 for more assistance.

- Balance Owed Returns – Review your bank transactions to ensure payment was processed. It is the policy of the Internal Revenue Service to process payments as soon as possible. If you payment was not made, check with your financial institution and call IRS customer service at 1800-829-1040.

- Refund Returns –

  o Check [Where's My Refund?](#)

  o If you entered the wrong banking information, check with your financial institution and call IRS customer service at 1800-829-1040

- Amended Returns (Form 1040X) – If you have discovered a mistake on your return, review [Tips for Filing an Amended Return](#). Amended returns are filed on paper and mailed in.

Other Issues and Assistance

We suggest you start your search for assistance on the [Tax Information for Individuals](#) page.

Do you think you are a victim of [ID Theft](#)?

Tax Law Help - If you need help understanding what information you should enter on a line, refer to the IRS instructions for the relevant form or schedule. There is a link for these instructions at the bottom of each Free File Fillable Forms screen. Publication 17 is also a useful resource for information. The help available for this program, Free File Fillable Forms, does not include interpreting the tax code or other tax assistance. For more assistance with answering Tax Law Questions, consider these resources:

- Use the [Interactive Tax Assistant](#)
- Visit an IRS local [Taxpayer Assistance Center](#)
- Use [Tax Topics](#) to investigate specific tax issues
- Call Tele-Tax toll-free, available 24 hours a day, 7 days a week at 800-829-4477 to hear prerecorded information about various tax topics in English or Spanish. Tele-Tax topics begin at page 93 of the Form 1040 Instructions.
- Access the IRS website and enter your KEYWORD to search for your tax topic
- If you still need tax law help, contact the IRS, toll-free at 800-829-1040
- If you have a hearing impairment, contact the IRS, toll-free at 800-829-4059 (TDD)
- If you live outside the United States, visit the International Services page on IRS.gov