

IRS Free File program delivered by TurboTax User Guide

For tax year 2019

Topics in the Guide

- Getting Started
- Preparing the Return
- Filing the Return
- Appendix

Getting Started

IRS Free File Program delivered by TurboTax

You qualify to use this product if you can answer “yes” to ONE of the following:

- Is your adjusted gross income \$36,000 or less?
 - [What is AGI?](#)
- Do you qualify for the Earned Income Credit?
 - [Whats EIC?](#)
- Are you active duty military (reserves, nation guard) and have an AGI of less than \$69,000?
 - [What counts as active duty?](#)

Login or Create a new account here:

<https://freefile.intuit.com/>

Review the qualifications

<https://freefile.intuit.com/qualifications/>

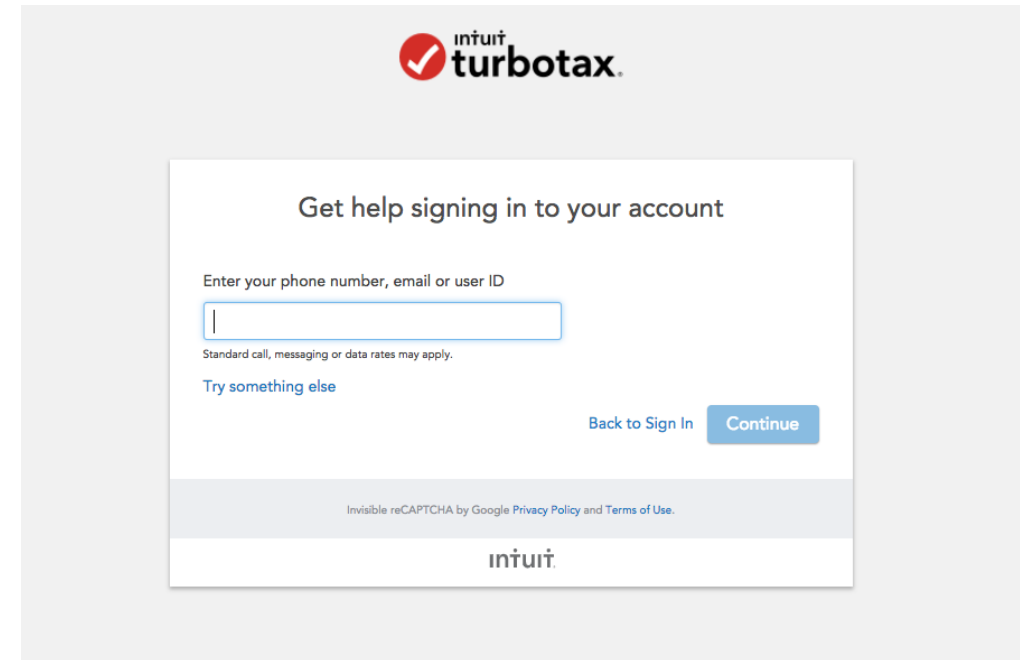
Sign In/Account Recovery

If you have filed with IRS Free File Program delivered by TurboTax (formerly TurboTax Free File Program, or TurboTax Freedom Edition) but don't remember their username or password, you can use Account Recovery to reset it. From the Sign In screen click, "I forgot my User ID/Password" to start this process.

You can recover the account by using any of the following information associated with the account:

- User ID
- Email
- Phone Number

If you don't have access to the email or phone number on the account, no problem! You can create a new account.



The screenshot shows the Intuit TurboTax account recovery interface. At the top right is the Intuit TurboTax logo. The main heading is "Get help signing in to your account". Below this is a text input field with the placeholder "Enter your phone number, email or user ID". Underneath the input field is a small note: "Standard call, messaging or data rates may apply." To the left of the input field is a link "Try something else". To the right are two buttons: "Back to Sign In" and "Continue". At the bottom of the form area, there is a small text link: "Invisible reCAPTCHA by Google Privacy Policy and Terms of Use." The Intuit logo is centered at the very bottom of the page.

IMPORTANT: Save your email/Account information in a safe place! It'll make filing next year a breeze!

Preparing the Return

My Info

Information about You and Your Family

Areas in My Info

- Basic info (Name, DOB, SSN, etc...)
- Filing Status
 - [What filing status is right for me?](#)
- Dependents- This can include children, grandchildren, parents, girl/boyfriends.
 - [Who can I claim as a dependent?](#)

Answer the questions on the screen and TurboTax will tell you what the best filing status is, and if you can claim dependents.

NOTE: You can go back and edit this area anytime by clicking “My Info” in the left side menu

The screenshot displays the TurboTax 'My Info' page. On the left is a dark sidebar menu with options: Tax Home, Previous Taxes, 2019 TAXES (My Info, Federal, State, Review, File), Tax Tools, Intuit Account, and Sign Out. The main content area is titled 'Personal info summary' and includes a search bar at the top right. It lists Jane Smith with fields for SSN (379-38-4798), Birthdate (01/01/1990), Occupation (Bank Teller), and Resident state (California). Below this is the 'Head of Household' marital status (Single). A dependent, Sam Smith, is listed with Status (Dependent), SSN (324-24-3242), and Birthdate (02/02/2014). A '+ Add a dependent' button is visible. At the bottom, the mailing address is shown as 123 Washington St, San Diego, CA 92103-2002, with a phone number (737) 373-7373. A 'debug' button is in the bottom right corner.

Income

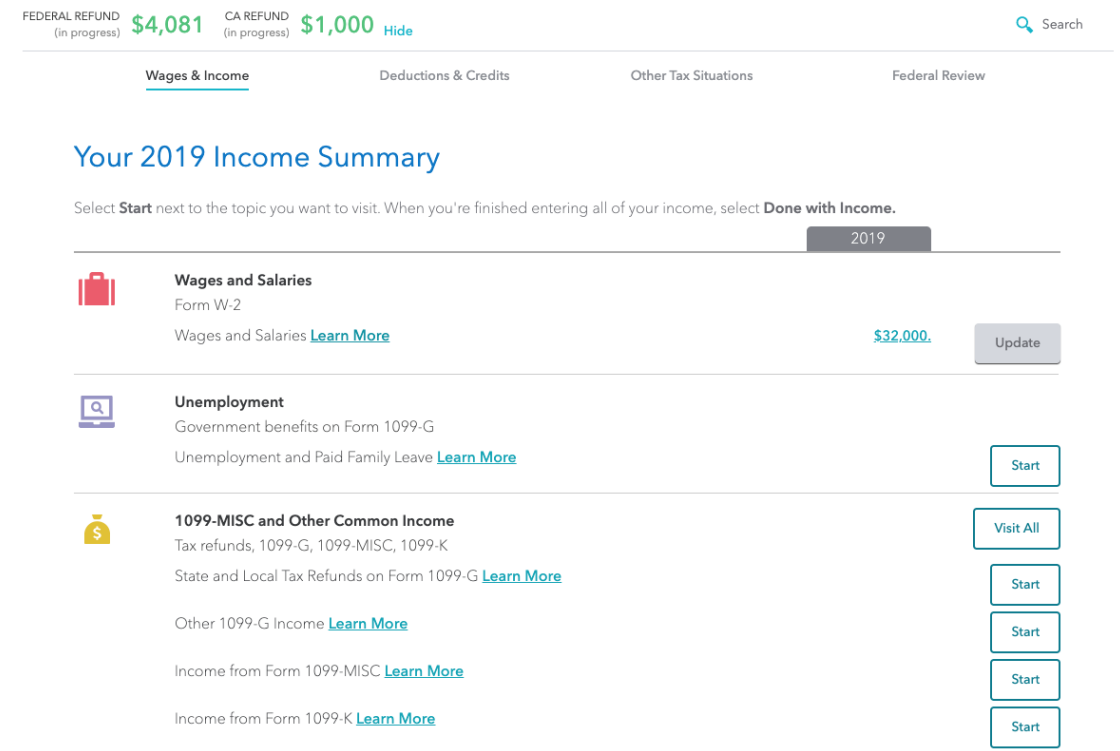
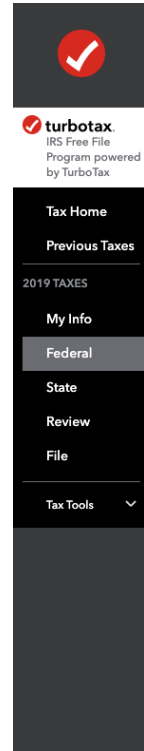
You'll need to enter ALL income* earned for 2019. This includes:

- ALL W-2s from employers
- ALL income from contract work or their business, including cash payments (see next slide for more info on this)
- Any retirement income from Social Security, and 1099-R forms
- Any other forms you may have received in the mail or online

What if I'm missing a form?

If you are still waiting on a form in the mail, misplaced it, haven't received a W-2 form a previous employer you should not file until you have all of these forms.

You can login to your account later to add the missing form and then file.



* Certain income isn't taxable and does not need to be included. Examples include SSI Disability income and child support.

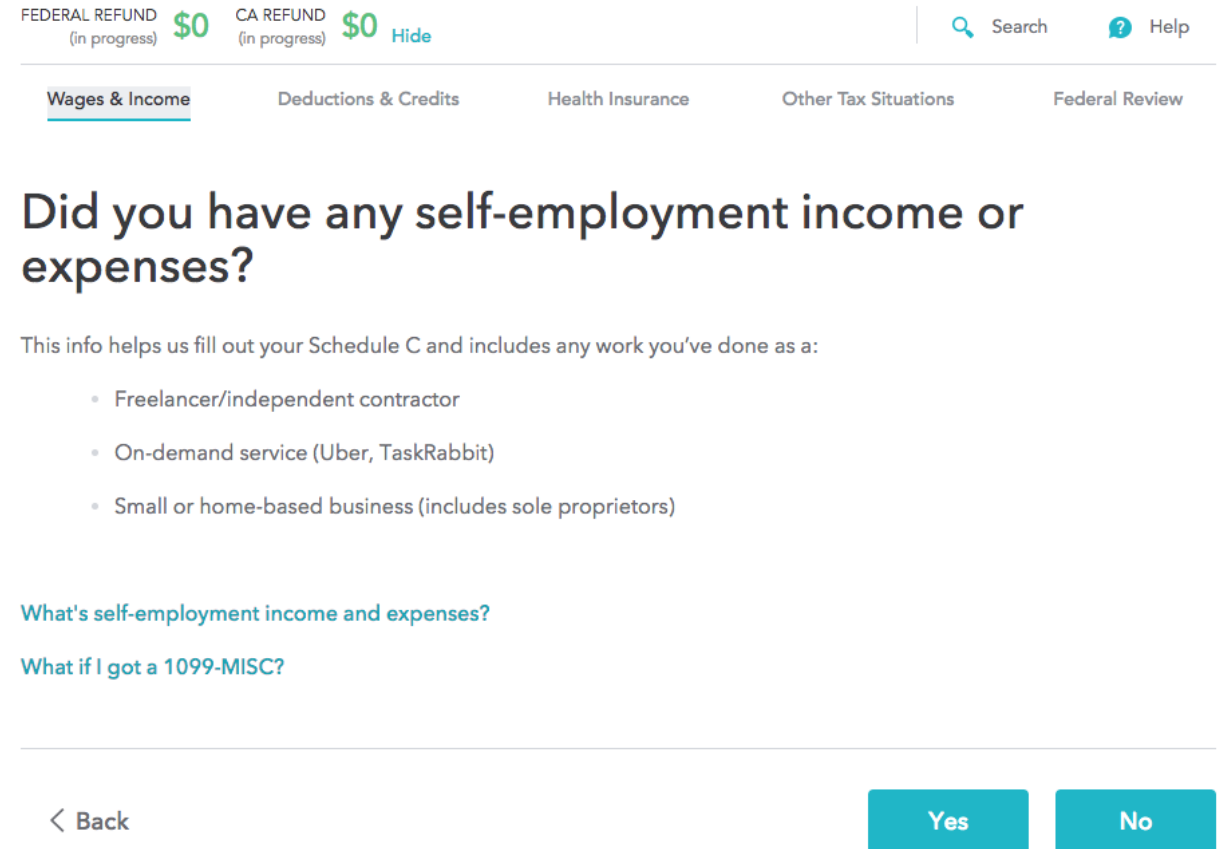
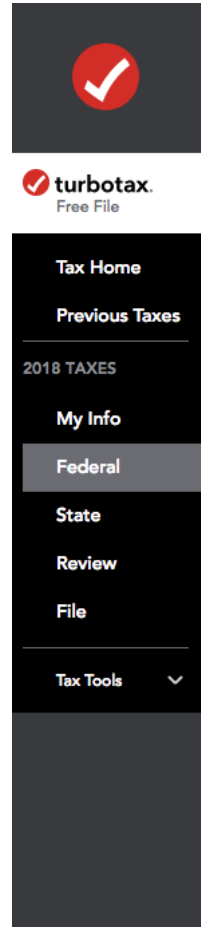
Income

1099-MISC/Business Income & Expenses

You may have a 1099-MISC for “non-employee compensation” (Box 7) and/or get paid in cash. If this is the case the IRS considers you to have a business, and you’ll need to file a Schedule C.

Enter **ALL** of the income associated with that job and **ALL** of the deductions (mileage, supplies, etc...)

[What are some income and deduction examples?](#)



Income: Over the AGI Limit

If you enter all your income and you are over the AGI limit to qualify for this program, you will see a disqualification screen

If this occurs, you can:

- **Recommended-** Go to the [IRS Free File site](#) and look at other Free File options (including [VITA](#))
- Transfer the account to a commercial TurboTax product. (See Appendix for instructions)



FEDERAL REFUND \$3,753 CA REFUND \$2,315 Hide

Search

You don't qualify to file free

Based on the information you provided, you do not meet the [qualifications](#) required to use IRS Free File Program powered by TurboTax. The reason is:

Your adjusted gross income is more than \$36,000, and you do not qualify for the Earned Income Credit (EIC).

If you don't qualify or your taxes are too complex for IRS Free File Program powered by TurboTax please return to IRS.gov to choose a free file product.

< Back

Exit to IRS.gov

IMPORTANT: Commercial TurboTax has different eligibility that the IRS Free File Program delivered by TurboTax. You may be upgraded to a paid product.

Deductions & Credits

Earned Income Tax Credit (EIC)

The Earned Income Credit is a great tax credit for working families. You can see if you qualify by navigating to the EIC topic. This is in the **Deductions & Credits** area under the **“You and Your Family”** section (see screenshot below)

- If you believe you qualify for Earned Income Credit, but the product says you do not qualify or received less than they expected:
 - Make sure the “My Info” section is accurate
 - Review the [EIC eligibility](#)

The screenshot shows the TurboTax interface. On the left is a navigation sidebar with a red checkmark icon and the text 'turbotax. Free File'. Below this are links for 'Tax Home', 'Previous Taxes', '2018 TAXES', and 'My Info'. The main content area shows a summary of tax status: 'FEDERAL REFUND (in progress) \$0' and 'CA REFUND (in progress) \$0' with a 'Hide' link. Below this is a search bar and a 'Help' link. The main section is titled 'You and Your Family' with a 'Visit All' button. Underneath, there are several options: 'Child care, Earned Income Credit, Adoption Credit' with a 'Start' button; 'Child and Dependent Care Credit' with a 'Learn More' link and a 'Start' button; 'Earned Income Credit (EIC)' with a 'Learn More' link and a 'Start' button (this row is highlighted with a red border); 'Adoption Credit' with a 'Learn More' link and a 'Start' button; and 'Child and Other Dependent Tax Credit' with a 'Learn More' link and a 'Start' button.

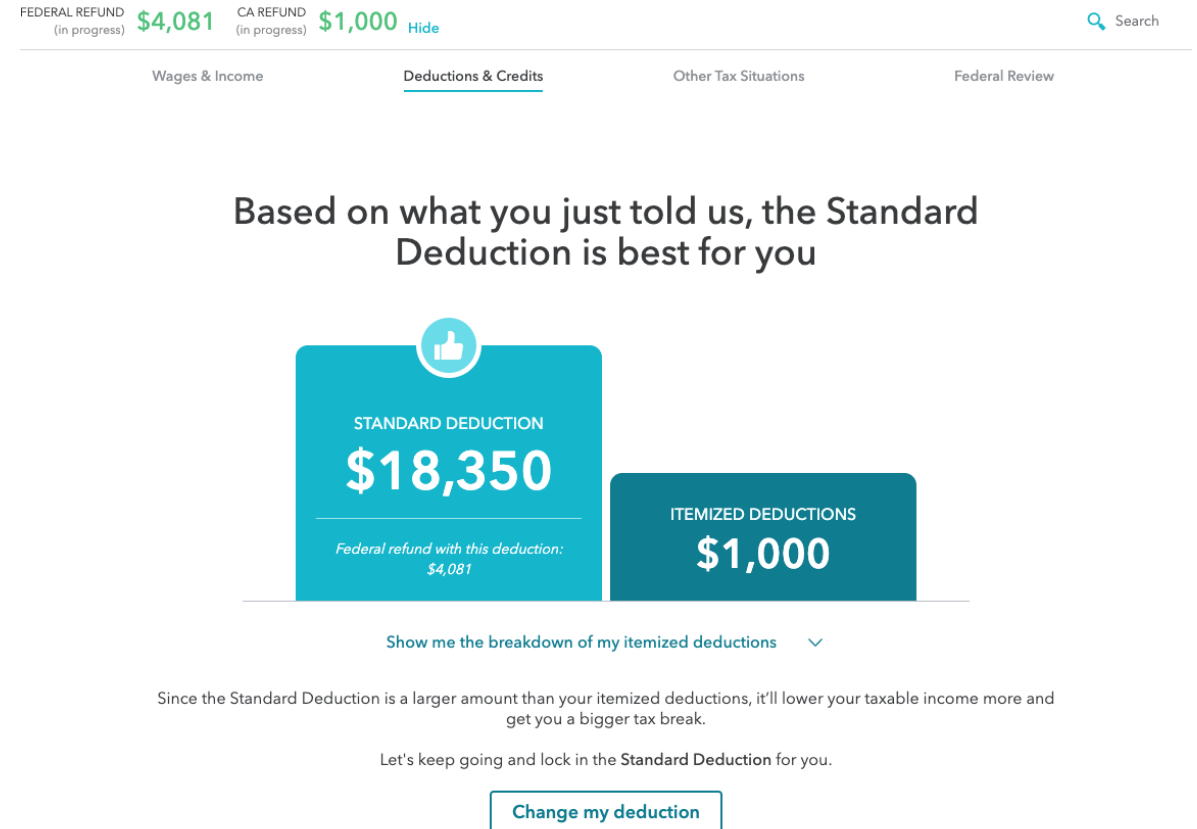
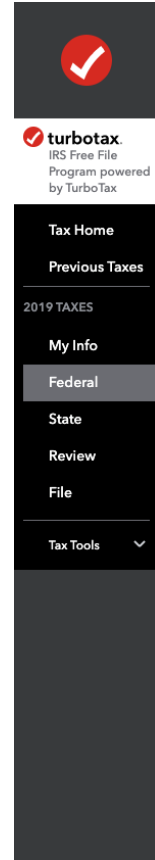
Deductions & Credits

Standard vs Itemized

Itemized deductions (charitable donations, medical expenses, mortgage insurance, property taxes) must add up to **MORE** than their Standard Deduction to be beneficial

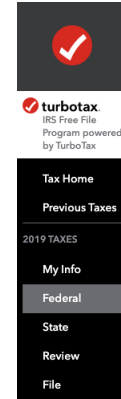
Standard Deduction amounts for 2019:

- Single- \$12,200
- HOH-\$18,350
- MFJ- \$24,400
- Unless you have a mortgage or an extreme amount of Medical Expenses it is unlikely that you will see a change in your refund from entering these deductions
- States have different standard deduction amounts; you can still enter these deductions on your federal return and TurboTax will transfer them to your state return automatically



Other Common Sections

- Health Insurance
 - If you have a **1095-A**, enter it in the **“Medical”** section of **Deductions & Credits**
 - If you received a 1095-B or 1095-C , or didn't have health insurance you don't need to enter any information
- 6-digit IP PIN
 - If you receive a 6-digit Identity Protection PIN from the IRS you must enter it in the **Other Tax Situations** section
- State Taxes
 - All appropriate Federal Info will be automatically transferred to their State Return



FEDERAL REFUND (in progress) **\$5,447** Hide Search

Student Loan Interest Paid (Form 1098-E) [Learn More](#) Start

Medical
HSA, MSA contributions, prescriptions, medical bills
1099-SA, HSA, MSA [Learn More](#) Visit All

Medical Expenses [Learn More](#) Start

Health Coverage Tax Credit [Learn More](#) Start


Affordable Care Act (Form 1095-A) [Learn More](#) Start


Estimates and Other Taxes Paid
Estimated taxes, sales tax for items like cars
Estimates [Learn More](#) Visit All

Wages & Income Deductions & Credits Health Insurance **Other Tax Situations** Federal Review

Other Tax Situations

Kasey, here are a few additional items that might apply to you.

 **Alternative minimum tax**
Alternative Minimum Tax (AMT) [Learn More](#) Start

 **Business Taxes**
Business taxes [Learn More](#) Start

[Prepare State](#)

Your State Returns

State Review



Let's get your state taxes done right

Here's what's coming up:

- We'll cover your state requirements
- We'll search for state tax breaks
- We'll help ensure your taxes are accurate

[Back](#)

[Continue](#)

Filing the Return

Review Your Order

- If you qualify for the IRS Free File Program delivered by TurboTax, then your total will be FREE!
- You will be required to register the TurboTax account on the next page.
 - Note: Registering the return does NOT mean it's filed yet.

FEDERAL REFUND \$0 CA REFUND \$0 [Hide](#) [Search](#) [Help](#)

Nice job, you're almost done!
Thank you for choosing TurboTax, your return is backed by our 100% Accurate Calculations Guarantee

TurboTax Free File Program	\$0
<ul style="list-style-type: none">• FREE tax prep—your federal tax return is prepared and ready for e-file• CompleteCheck™—you got a comprehensive review of your return so you can file with total confidence• 24/7 tax support—get your questions answered from our online community of TurboTax specialists and customers	
California tax return	\$0
<ul style="list-style-type: none">• Comprehensive review—your tax return complies with all California's tax laws• Saved time—your federal info was transferred to your state return so you didn't have to start from scratch• Maximized deductions and credits—searched through all of California's deductions and credits to ensure you got all the tax breaks you deserved	

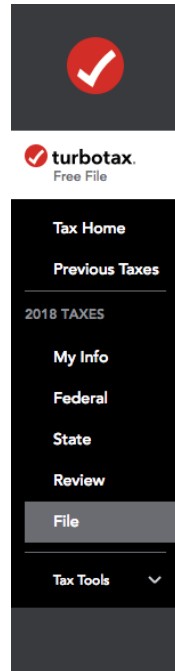
Total (2 items): **Free***
plus applicable sales tax

[< Back](#) [Continue](#)

* TurboTax Online pricing is based on your tax situation and varies by product. Actual prices are determined at the time of print or e-file and are subject to change without notice.

Refund/Balance Due

- **If you have a refund:**
 - You can choose to have your Refund directly deposited into your bank account (Recommended!) or mailed via paper check.
- **If you have a balance due:**
 - If you owe tax on your Federal or State return you can have the tax due debited out of your account or pay it via paper check.
 - You will receive all the necessary vouchers and mailing addresses when you print the return.



FEDERAL REFUND **\$1,500** [Hide](#)

[Search](#) [Help](#)

Choose how you'd like your refund

The IRS begins processing returns on January, 22nd

- Direct deposit my entire refund into my savings account
- You can get your refund deposited into up to 3 bank accounts or have up to 3 savings bonds mailed to you. [Learn more](#)
- Direct deposit my entire refund into a checking or other bank account
- Mail me a paper check

Be ready for life's unexpected emergencies by saving your refund.

[Back](#)

[Continue](#)

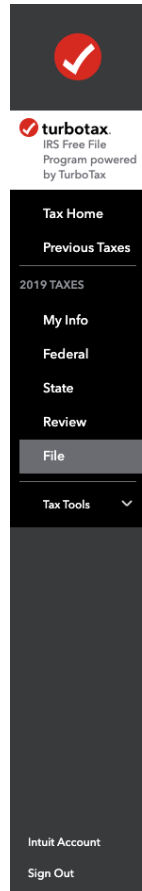
Prior Year AGI

As a security measure from the IRS, everyone must add their last year's AGI to their return in order e-file a return. If you do not have your prior year return available, you will need to print and mail the return.

Exceptions:

- You have a 5-digit "Self Select PIN" they you've used every year.
- You entered a 6-digit "IP PIN" you received from the IRS.
- You did not file a return last year.

NOTE: You CANNOT guess this number. If the Prior year AGI does not match what the IRS has on record the return will be rejected by the IRS



The screenshot shows the TurboTax interface. At the top, there is a red checkmark icon and the text "turbotax. IRS Free File Program powered by TurboTax". Below this is a navigation menu with the following items: "Tax Home", "Previous Taxes", "2019 TAXES", "My Info", "Federal", "State", "Review", "File" (highlighted), and "Tax Tools". At the bottom of the menu, there is a "Sign Out" link.

FEDERAL REFUND \$1,055 CA REFUND \$608 [Hide](#)

[Search](#)

To e-file successfully, the IRS needs your adjusted gross income (AGI) from your 2018 tax return

Your 2018 AGI is a unique number on last year's tax return.

What tax paperwork do you have?

- I have my 2018 tax return. (Highly recommended)
- I can't get my 2018 tax return. I'll print and mail or use the self-select PIN I created last year
- I requested and received my 2018 transcript from the IRS. [?](#)
- I didn't file last year. [?](#)

[Where can I get last year's tax return?](#)

[Back](#)

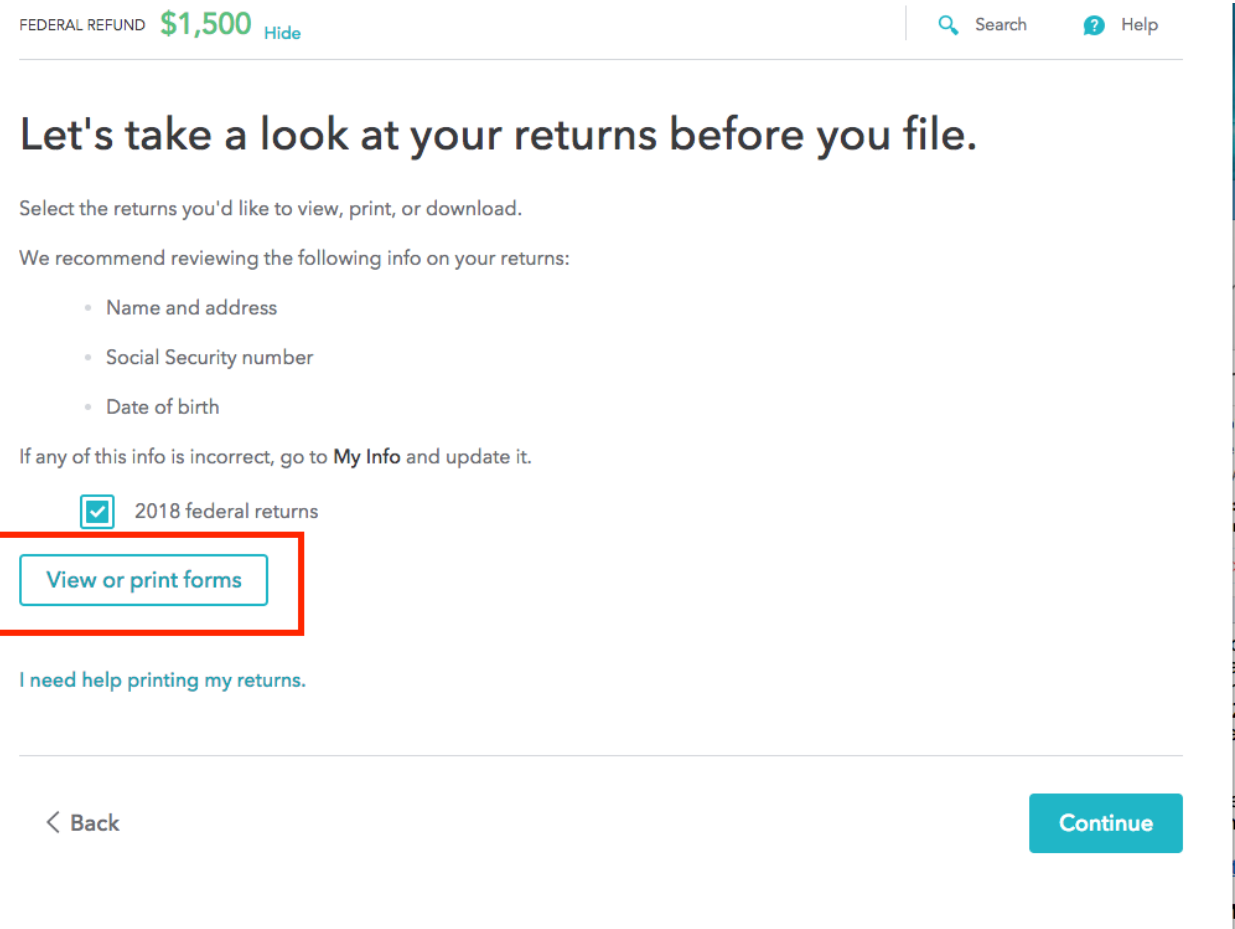
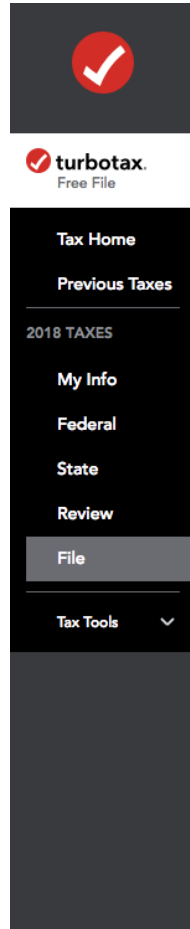
[Continue](#)

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debug

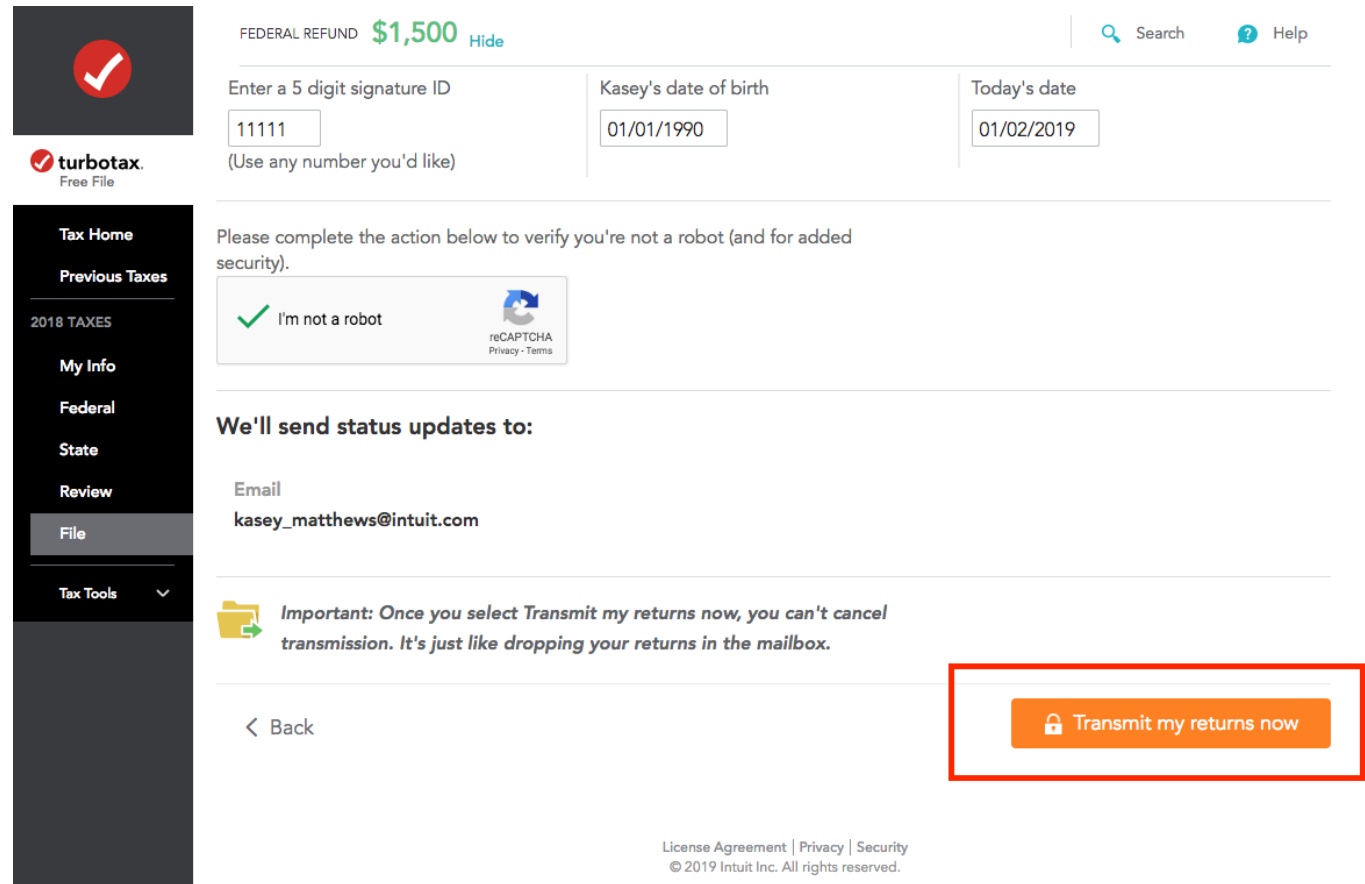
Print a Copy of your returns

- When you see this → page.
STOP.
- Be sure to print or save a copy of your federal and state returns!
- If you have to print and mail your returns, print TWO copies. One to mail in and one to keep for your records.



TRANSMIT THE RETURN! (HOORAY! YOU DID IT!)

- If e-filing the return
 - The orange button officially sends the returns to the IRS and your state authority (if necessary)
- If mailing the returns
 - Read the mailing instructions carefully! You will have all the instructions printed out with the return
 - Your return isn't filed until the IRS and state authorities receive a copy in the mail
 - Don't delay! Get them in the mail before April 15th



The screenshot shows the TurboTax interface for transmitting a return. At the top, a red checkmark icon is displayed next to the TurboTax logo and 'Free File' text. The main content area shows a 'FEDERAL REFUND \$1,500' with a 'Hide' link. Below this, there are three input fields: 'Enter a 5 digit signature ID' (with value '11111'), 'Kasey's date of birth' (with value '01/01/1990'), and 'Today's date' (with value '01/02/2019'). A reCAPTCHA verification step follows, with a green checkmark and the text 'I'm not a robot'. Below the verification, the email address 'kasey_matthews@intuit.com' is listed under 'We'll send status updates to:'. A warning message states: 'Important: Once you select Transmit my returns now, you can't cancel transmission. It's just like dropping your returns in the mailbox.' At the bottom, there is a '< Back' link and a prominent orange button labeled 'Transmit my returns now' with a lock icon, which is highlighted with a red border. The footer contains the text: 'License Agreement | Privacy | Security © 2019 Intuit Inc. All rights reserved.'

After filing

E-filing

Check your e-mail! You should receive an email that your returns were Accepted or Rejected by the IRS/State in 48-72 hours.

If your returns are Rejected, don't panic! Log back into your account and follow the instructions to fix and resubmit the returns.

If the returns are Accepted, the IRS still needs to process the return and approve the refund. Refunds are usually sent out within 21 days of being Accepted.

You can track your refund at the IRS- <https://www.irs.gov/refunds>

Print and Mail

Once you mail in your return(s), they are processed in 4-6 weeks.

Should You Call the IRS?

Once your return has been Accepted, TurboTax cannot tell you where your refund is. The IRS issues most refunds in less than 21 days, although some require additional time. You should only call if it has been:

- 21 days or more since you e-filed
- 6 weeks or more since you mailed your return, or when
- "[Where's My Refund](#)" tells you to contact the IRS

Appendix

Switching from IRS Free File to Commercial TTO

Please review the eligibility criteria for IRS Free File Program delivered by TurboTax carefully. If you started preparing your return and realize that you don't qualify, you should go to the IRS Free File site and look at other IRS Free File options that may fit your situation.

<https://www.irs.gov/filing/free-file-do-your-federal-taxes-for-free>

If you want to switch your account to a commercial TurboTax product, you can do so without creating a new account.

1. Log out of the return (make you have the username and password nearby!)
2. Close your browser window, and open a new one, or go to Incognito mode
3. Go to <https://turbotax.intuit.com/>
4. Click on **Product & pricing** at the top, then “TurboTax” under “**File online**”
5. Choose the necessary commercial product for your situation and click “Start for Free”
6. Choose “Sign In” at the top right
7. Log in with the same account information

Eventually you will be prompted to confirm the change to a commercial TurboTax product.

REMINDER: Once you are in a commercial TurboTax product you may be prompted to upgrade or offered other products.