MyFreeTaxes.org Self-Filing Guide

The purpose of this guide is to walk you through the process of filing your taxes for the 2023 tax filing year from beginning to end with free tax filing software provided by MyFreeTaxes.org.

Self-filing is a good option for tax filers who are filing a current year tax return, are comfortable using online tax software and want to learn how to file on their own.

Please note, that we have video tutorials of this guide available here in English (also available here in ASL) that were created for tax filing year 2021 and should be used as reference only for the 2023 tax filing year and future tax filing years.

Step 1: Go to MyFreeTaxes.org 2

Step 2: Create An Account With TaxSlayer 4

Step 3: Begin self-filing your 2023 tax return with TaxSlayer. 6

Step 4: Enter Your Income 10

Step 5: Maximize Your Refund by entering in credits and deductions 17

Step 6: Answer the Health Insurance - Affordable Care Act (ACA) Insurance Plan Question 26

Step 7: Prepare your California State Tax Return 27

Check the status of your return 34

Print your return 34

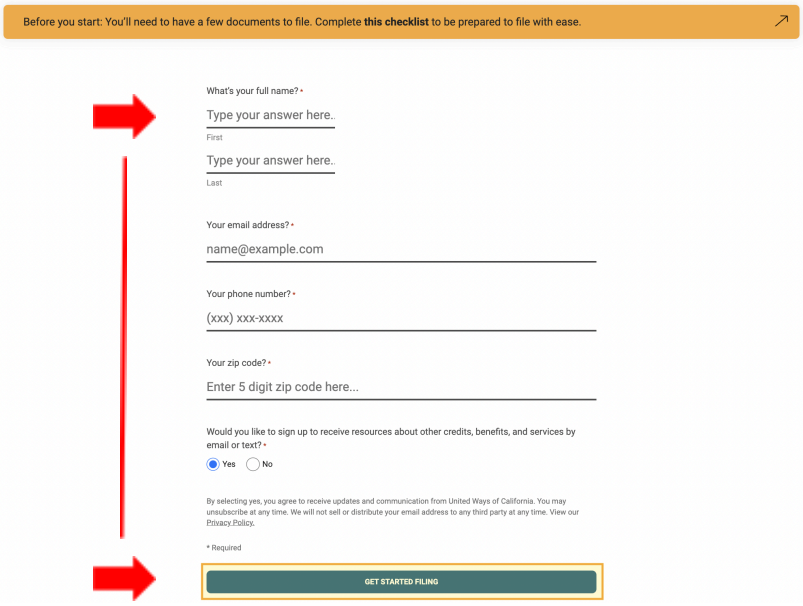
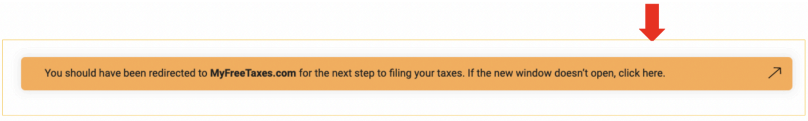
Filing an Amended Tax Return using TaxSlayer 37

Need to check the status of your refund? 38

Need a payment plan? 38

Need to contact Customer Support? 38

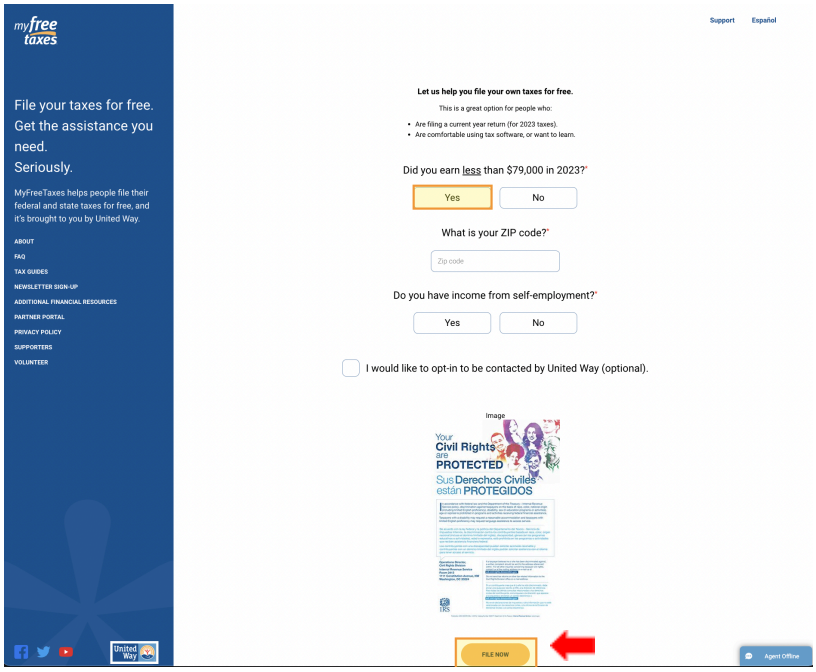
Step 1: Go to MyFreeTaxes.org

Go to MyFreeTaxes.org. Click "**File on my own**".	
Scroll down and enter your contact information Click "**GET STARTED FILING**".	
You should be automatically directed to the next page—if not, you will need to click the orange bar that says "**If the window doesn't open, click here**".	

Indicate if you earned less than $79,000 or more, type in your zip code, and indicate if you had income from self-employment.

- ***Please note***, that if you made above $79,000, you still qualify to self-file for free. You will just be redirected to use CashApp instead of TaxSlayer to file. And, any self-employment income can also be reported using TaxSlayer or CashApp.

Click "**FILE NOW**".

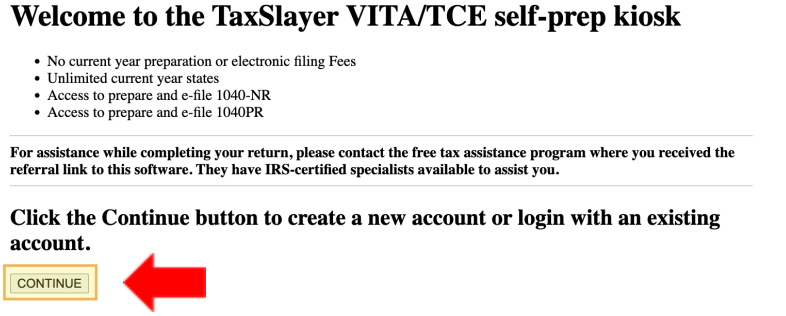


In 15 seconds, our MyFreeTaxes.org page will automatically redirect you to the TaxSlayer VITA/TCE self-prep kiosk page.

If you would like to be redirected more quickly, click "**FILE NOW**".

Click the **"CONTINUE"** button to create a TaxSlayer Account.

Go on to Step 2.

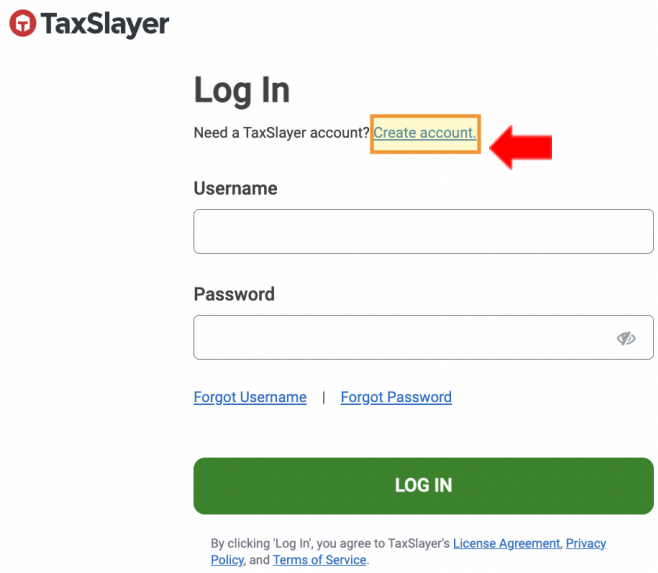


Step 2: Create An Account With TaxSlayer - the free IRS self-filing website

If this is your first time creating a TaxSlayer account for 2024, at the top of the page, click **"Create account"**. If you already have an account, just enter your username and password.

Please note:

- Remember to bookmark this page on your web browser to log back in at any time.
- You can also copy and paste the link and save it in your notes, email, etc.
- If you forgot your username, press the button that says **"Forgot Username"** If you forgot your password, press the button that says **"Forgot password"**.
- If you run into any issues with the link, contact the main helpline at: 866-698-9435.



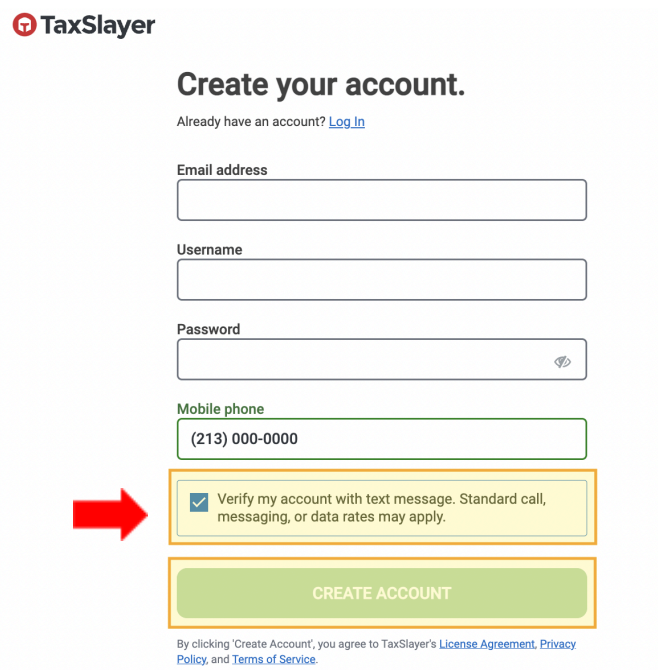
Complete the information necessary to create an account.

If you would like to *verify your account via text message*, make sure the box that says **"Verify my account via text message"** is checked. If you would like to *verify via email*, ***uncheck the box***.

Please note:

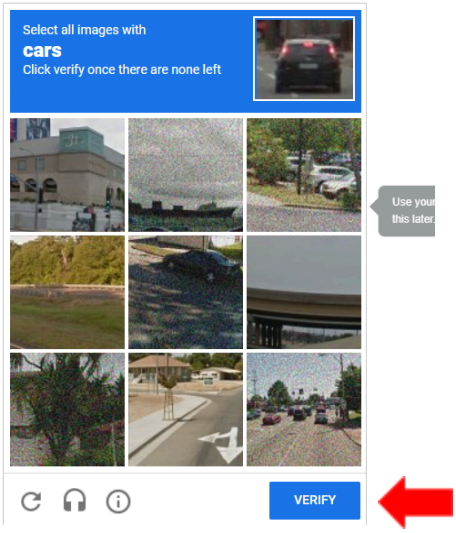
- Save your username and password in a secure place with your tax documents
- You can log in and out of your tax account as you work on your return. You do not need to enter all the information at one time.

Click **"Create Account"**.



In this next step, you will have to confirm that you are really a person and not a bot.

1. Complete the CAPTCHA (This is a question-answer type security system to verify that you are a person).
2. To complete the CAPTCHA, you must choose all the photos that match the indicated word.
3. Press the button that says **"VERIFY"**.



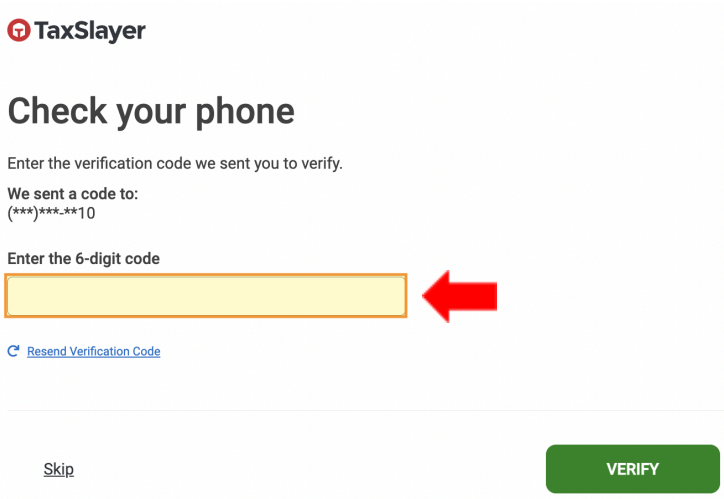
If you chose to receive your code **by text message**:

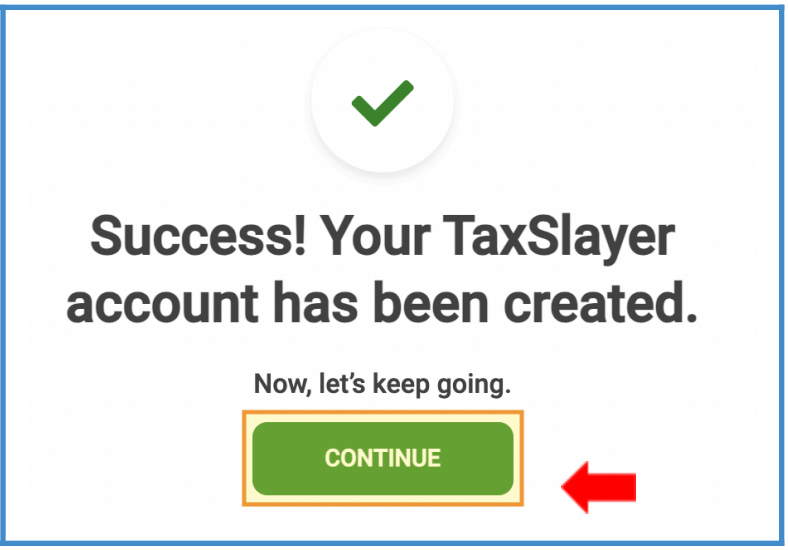
1. Click on **"SEND CODE"**.
2. Enter the security code sent to your phone number.
3. Click **"Verify"**.

If you chose to receive your code **by email:**

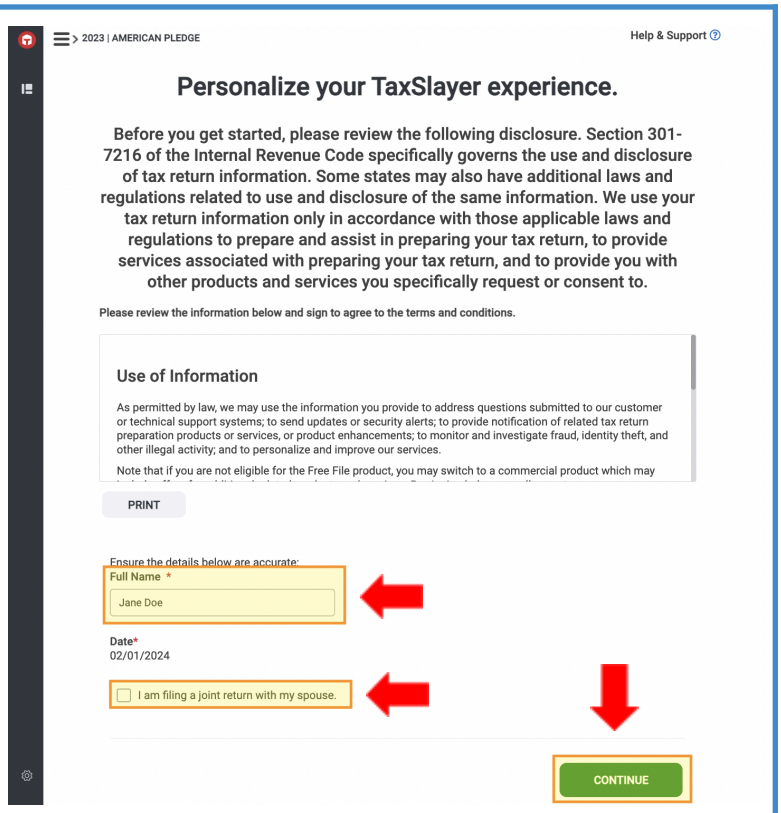
1. Complete the CAPTCHA (This is a question-answer type security system to verify that you are a person).
2. To complete the CAPTCHA, you must choose all the photos that match the indicated word
3. Press the button that says **"VERIFY"**.

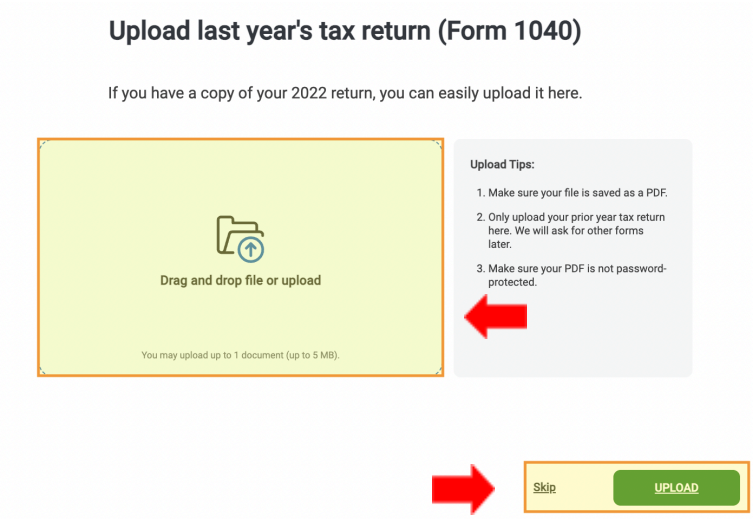
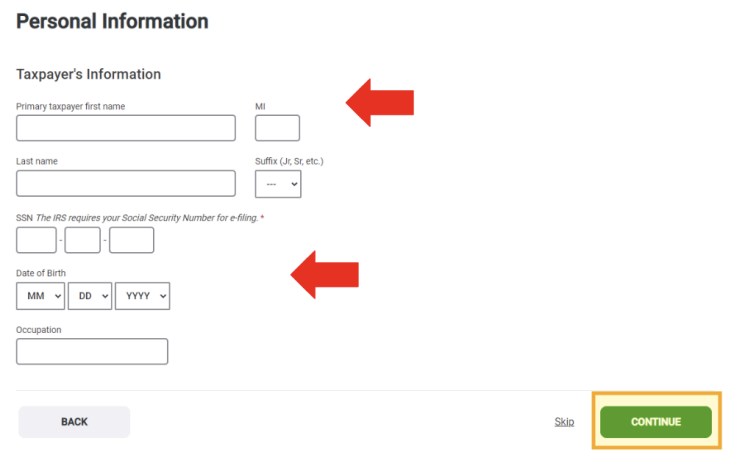
Please note, regardless of the method you use to verify your account, if you entered an email when creating your account, you will receive an email in your inbox to verify your email. You do not have to do this right away.



Click **"CONTINUE"** to begin your 2023 tax return.	

Step 3: Begin self-filing your 2023 tax return with TaxSlayer.

Type your full name into the box. If you are married and filing jointly, check the box that says **"I am filing a joint return with my spouse".** If you are *NOT married* – leave that checkbox blank. Click **"CONTINUE"**.	

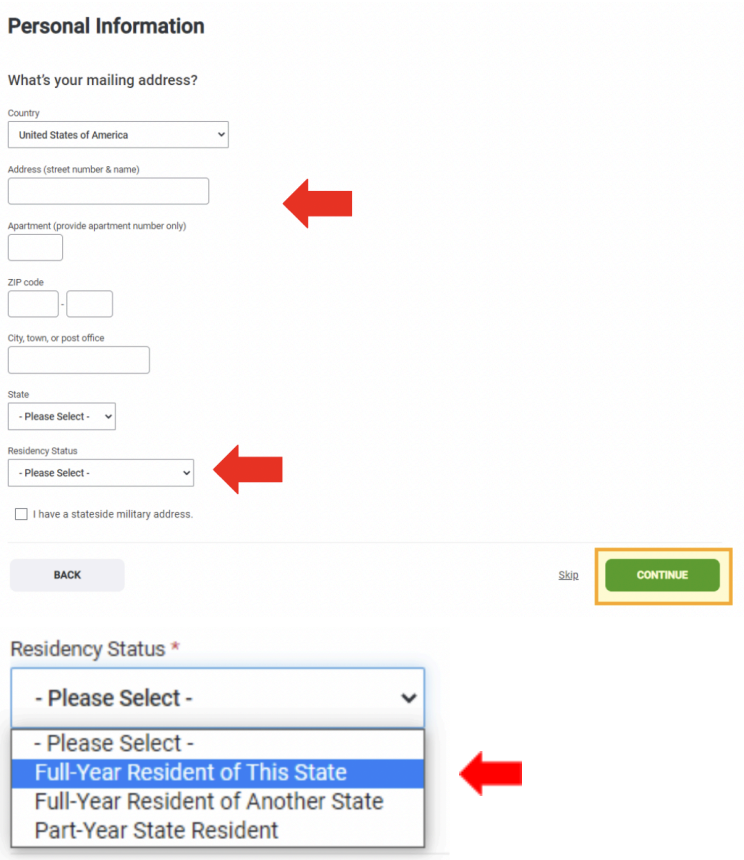
If you have last year's tax return, you can upload it and click **"VIEW RESULTS"**. If not, click **"Skip"**.	
Type in your personal information **<u>Please note:</u>** • Double check spelling and numbers • Enter your personal information as it is written on your Social Security Card or Individual Taxpayer Identification Number Click **"CONTINUE"**.	

Enter your mailing address and residency status.

Please note:

- If you do not have a mailing address—ask a shelter, clinic, or youth center to use their address and use that information.
- For residency status, select "Full-Year of the State" if you lived in California the whole year. If you moved to California in 2024 and lived in a different state in 2023 select "Full-Year Resident of Another State". If you lived in multiple states, select "Part-Year State Resident".

Click **"CONTINUE"**.

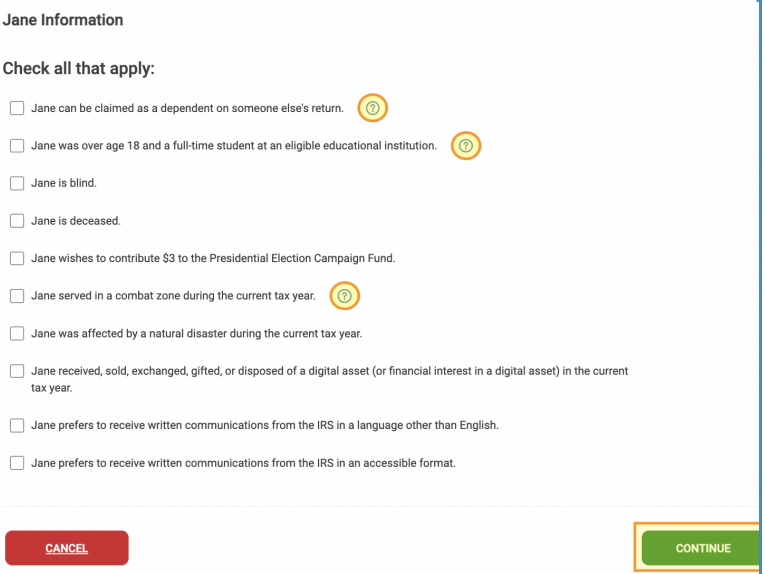


Click on any checkbox that applies to you, or leave them blank.

Please note:

- You can click on the question mark icons next to each checkbox to learn more information.

Click **"CONTINUE"**.

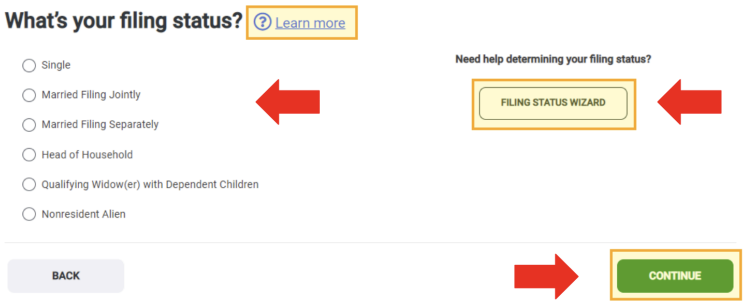


Select your filing status

Please note:

- If you would like to know more about what each filing status is, click the question mark icon next to **"Learn more"**.
- If you are unsure of which filing status to use, click the **"FILING STATUS WIZARD"**.

Click **"CONTINUE"**.



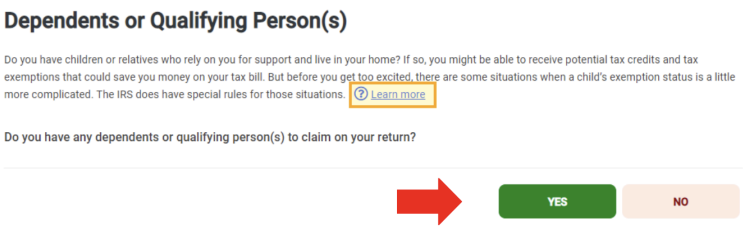
Click **"YES"** or **"NO"** to claim dependents on your return.

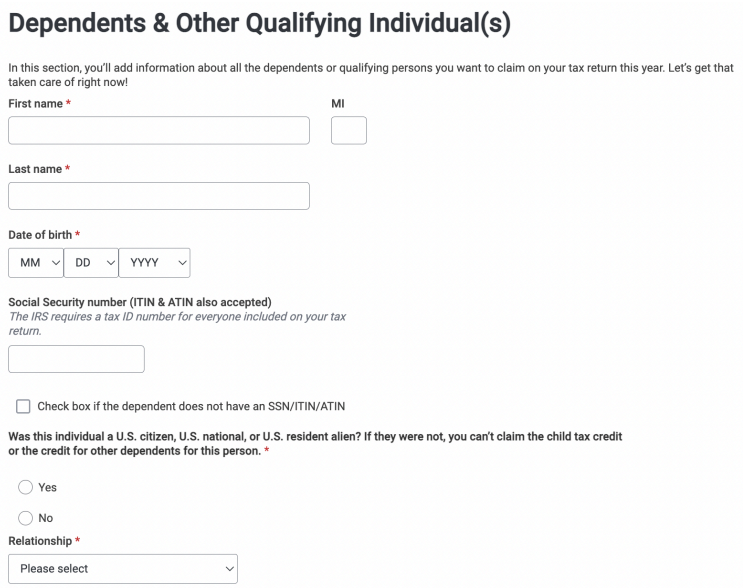
Please note:

- If you are a custodial parent or guardian to a child or relative, click **"Yes"** and enter the child(ren)'s information.
- If the dependent you are trying to claim does not have an SSN, ITIN, or ATIN, you will be ineligible to e-file. In that case, you can still file, but will need to submit a paper return. Check out our "In-person help" option through MyFreeTaxes.org.
- If you are unsure if you can claim a dependent, click the question mark icon to learn more.

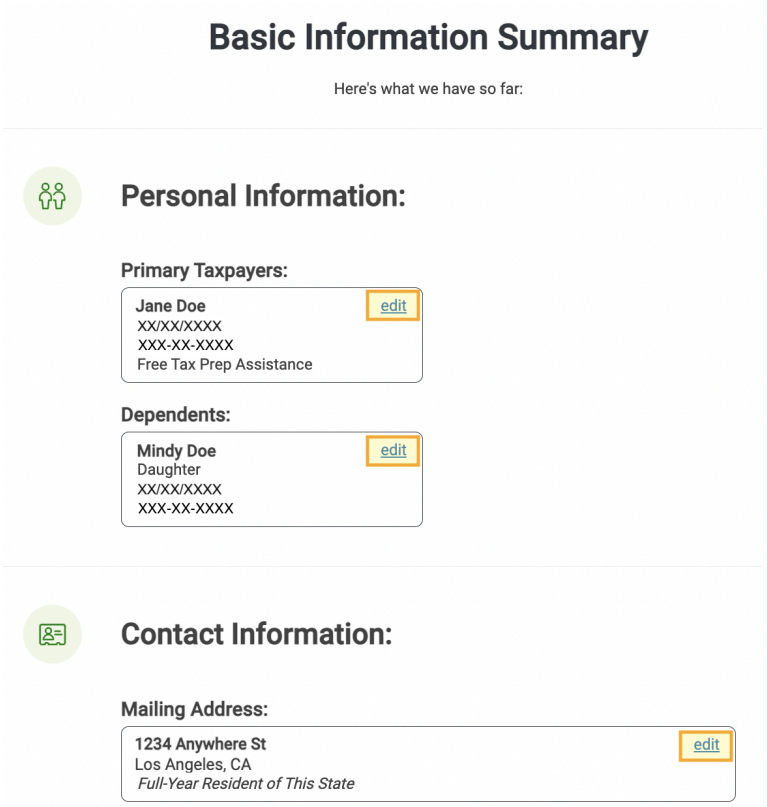
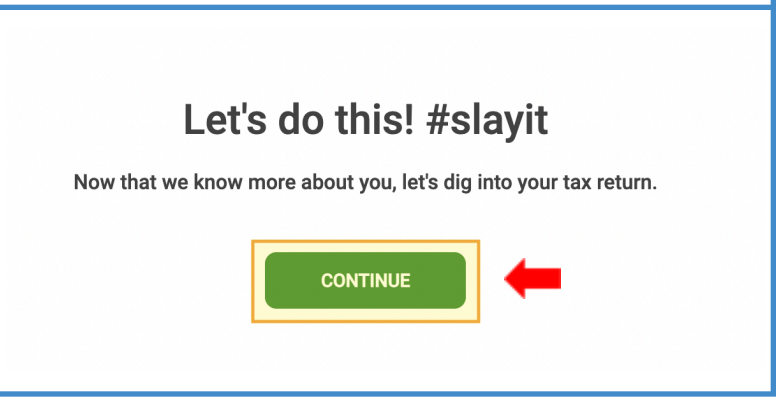
If you indicated **"YES"**, in the next page, fill in the information for the dependent you are trying to claim. If you have more than one dependent, you will be able to include them after this page.

Click **"CONTINUE"**.

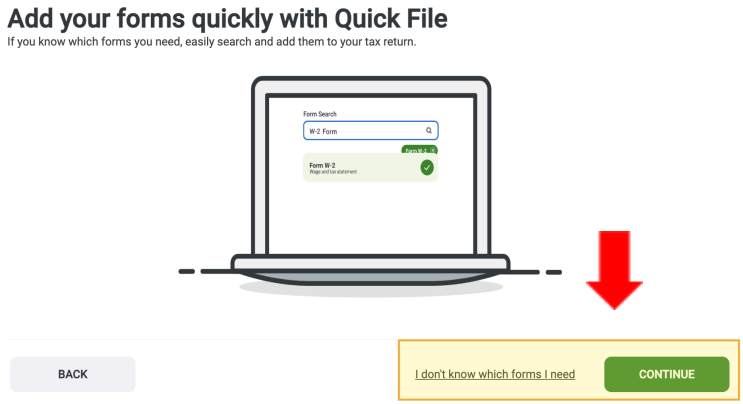
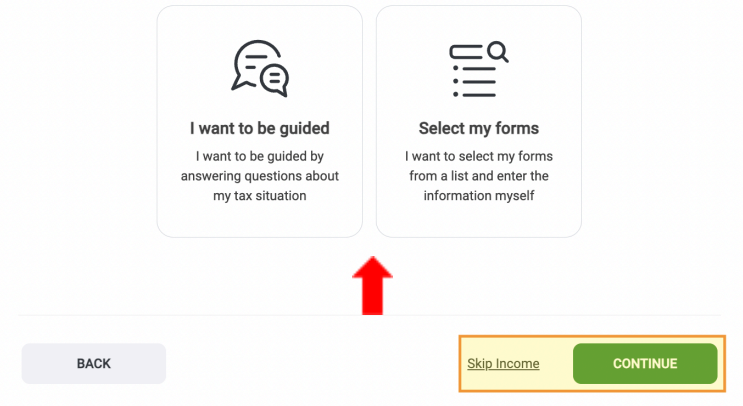




	Number of months this person lived in your home during 2023 12 **Note**: If this dependent was born in 2023, you must select 12 months **Check all that apply:** ☐ This person was over age 18 and a full-time student at an eligible educational institution. ☐ This individual was disabled. ☐ This individual is NOT my dependent. ☐ I do NOT wish to claim this individual for Earned Income Tax Credit (EITC) purposes. ☐ This dependent is married. ☐ This individual made over $4,700 of income CANCEL → CONTINUE
To input another dependent, click **"Add a Dependent"**. Click, **"CONTINUE"**.	2023 | AMERICAN PLEDGE — Help & Support **Dependent Summary** Add a dependent Mindy Doe — Daughter — Social Security Number ***-******* — Date of birth **/**/2020 → CONTINUE
If you have experienced identity theft or tax fraud and the IRS has provided you with a six-digit Identity Protection Pin, select "Yes". Learn more about Identity Protection Pins here. If not, select "No". Click **"CONTINUE"**.	**IRS Identity Protection PIN** Did you or anyone on your tax return receive a CP01A notice from the IRS containing a 6-digit Identity Protection PIN? Learn more ○ Yes, someone on my return received an Identity Protection PIN. ○ No, no one on my return received an Identity Protection PIN. BACK — Skip — CONTINUE

Make sure your personal information is all spelled and entered correctly Click **"Edit"** if anything needs to be reentered. Click **"CONTINUE"** when it is all correct.	
Click **"CONTINUE"** to enter your work and income information.	

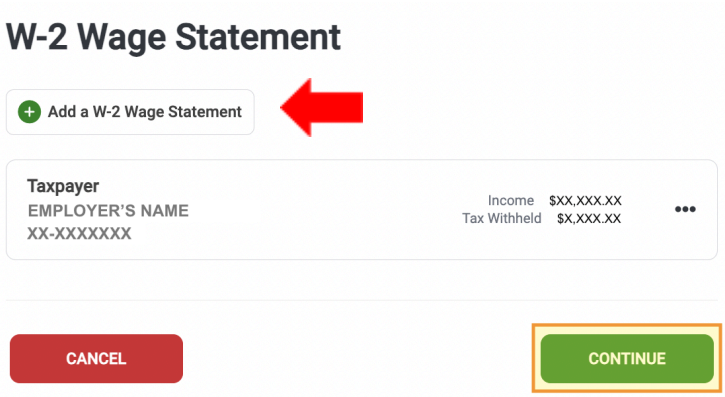
Step 4: Enter Your Income if you had earned income, college scholarships or were self-employed. This includes tax documents such as W-2, 1099-NEC or MISC, 1098-T etc.

You can add your tax forms quickly with Quick File, if you know which forms you need. If you do, click **"CONTINUE"**. If you do not know which forms you need, select **"I do not know"**.	
Click either: • **"I want to be guided"** or • **"Select my forms"** if you already have all of your documents ready If you do not have any income from jobs, scholarships, retirement, or other, select **"Skip Income"**.	

If you had a part-time, full-time, or seasonal job as an employee, you will have a W-2 from each job you had in 2023. If you have a W-2 to enter, click **"Yes"**. If not, click **"No"**. Then click **"CONTINUE"**.	INCOME GUIDE **Wages & Salary** Form W-2 Do you have any W-2s to enter? Yes No BACK Restart/Exit Income Guide
If you clicked **"Yes"** in the previous step, enter the tax document information from your W-2. **Please note:** • Type in the information from your W-2 exactly as it is on your tax document • If you have more than one W-2, you will be able to enter additional W-2s in the next step. Click **"CONTINUE"**.	FORM W-2 **Wage and tax statement** Check any of these that apply to you: Most people won't need to check these boxes. This is a corrected W-2 This is a substitute W-2 This is a railroad W-2 **Employer information** b - Employer identification number (EIN) * c - Employers name * Country * United States Address (number and street) *

Select **"Add a W-2 Wage Statement"** if you had more than one job in 2023.

Click **"CONTINUE"**.



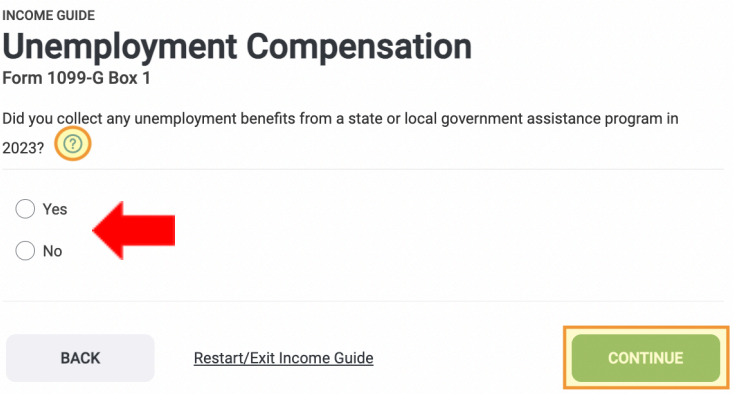
If you received unemployment compensation in 2023, you should have a 1099-G form.

Please note:

- If you receive unemployment benefits, you generally must include the payments in your income when you file your federal income tax return, but they are exempt from California state income tax. Read more on the IRS website here and on the CA EDD website here.

If this applies to you, click **"Yes"** and then click **"CONTINUE".** In the next page, click "BEGIN" next to "Add or Edit a 1099-G" to begin entering information from your 1099-G form.

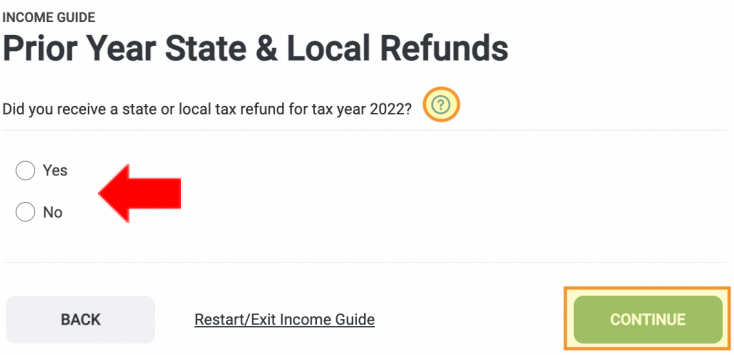
If you did NOT receive any unemployment compensation, click **"No"** then click **"CONTINUE"**.



If you received a 1099-G form from the Franchise Tax Board (FTB), click **"Yes"** and then **"CONTINUE"**.

Please note:

- Form 1099-G may arrive in the mail, or you may be able to print it from your state's website. The taxable income amount can be found in box 2 and is based on your standard or itemized deductions taken on last year's return.



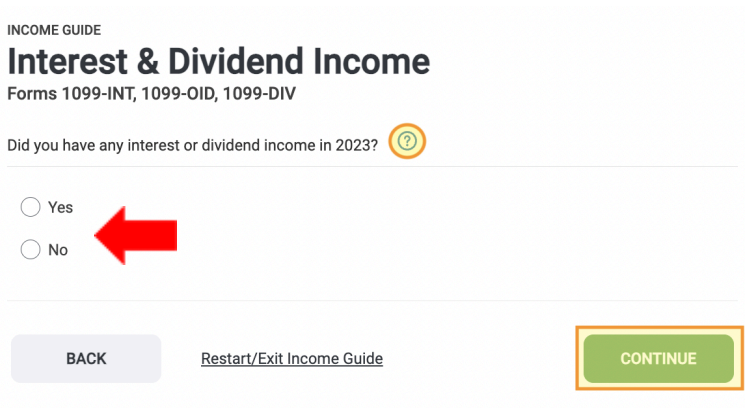
In the next sections, you will be asked about:

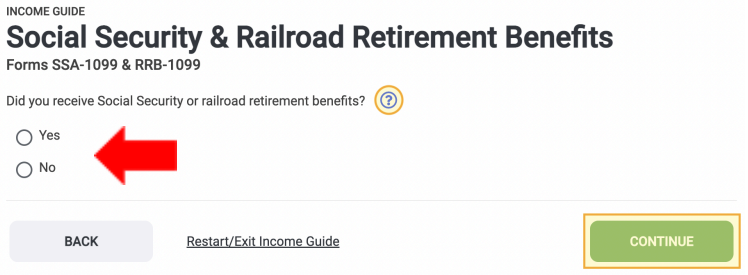
- Interest & Dividend Income (Forms 1099-INT, 1099-OID, 1099-DIV)
  - Includes interest earned on a savings account and dividend earnings from stock and mutual funds.
  - You should receive one of these forms once your earnings have reached $10. However, all interest and dividend income is taxable on your return even if you didn't receive one of these forms.
- Retirement Account Distributions (Forms 1099-R & RRB-1099-R)
  - Such as a pension, annuity, IRA, or even an insurance contract.
- Deferred Retirement Income (Form 8915-F)
  - If you received a distribution from your retirement plan in 2020 and elected to spread the distribution over three years. The election had to be made on your 2020 return.
- Social Security & Railroad Retirement Benefits (Forms SSA-1099 & RRB-1099)
  - If you received Social Security benefits throughout the year, you should receive Form SSA-1099 that reports amounts including the amount of benefits received (box 5).
  - If you are collecting Tier 1 railroad benefits, you should have received Form RRB-1099.
- Miscellaneous Income (Form 1099-MISC)

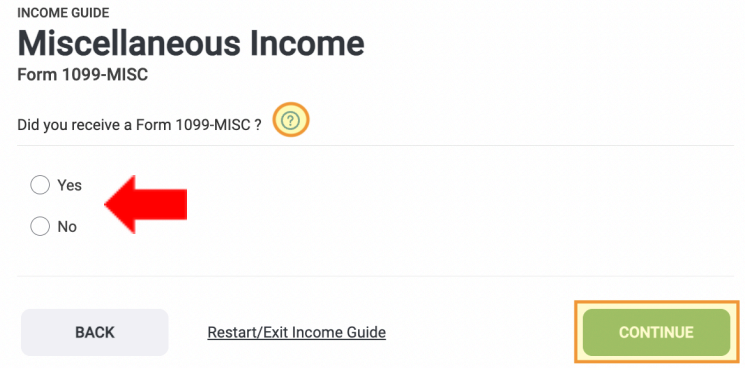
In each of these sections, you will indicate **"Yes"** or **"No"** and then click "**CONTINUE**".

Please note:

- Click the question mark icon on any of these pages if you need additional information.



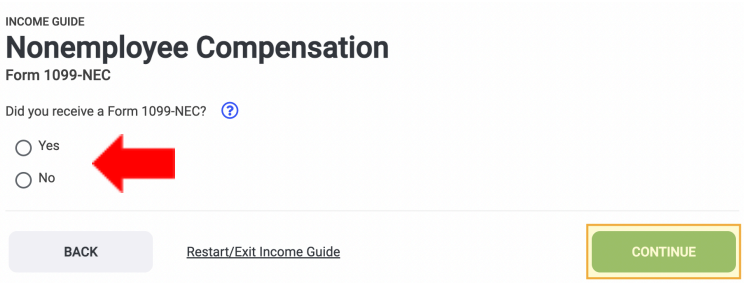




If you worked as a contractor or gig worker or were self-employed, enter the information from your forms 1099-MISC or 1099-NEC.

Please note:

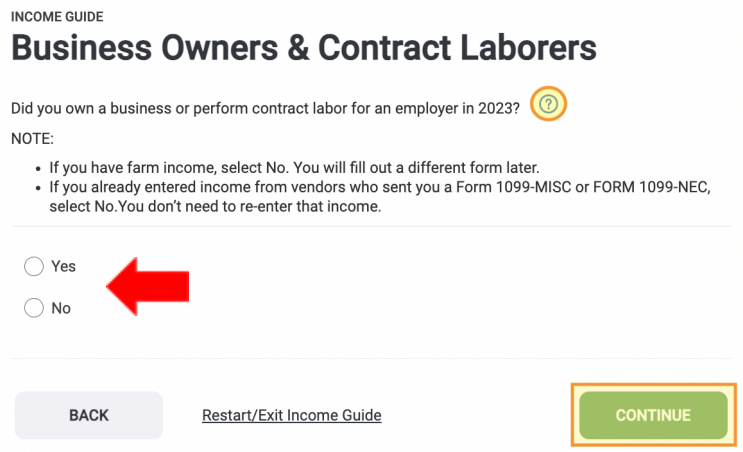
- Use this spreadsheet below to add up your qualified business expenses for 2023:
  Annual Self-Employed Income & Ex...



If you owned a business or performed contract labor for an employer in 2023, select **"Yes".** If not, select **"No"** and then click "**CONTINUE**".

Please note:

- Click the question mark icon on any of these pages if you need additional information.

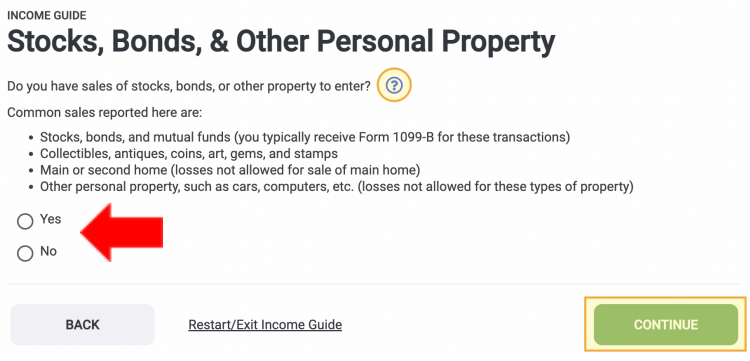


If you sold stocks, bonds or other property:

- Click **"Yes"** and then click **"CONTINUE"**.
- In the next page click **"BEGIN"** next to **"Stocks, Mutual Funds, Cryptocurrency, Collectibles, etc"**. Then enter information from your 1099 consolidated tax statement. Once you are done with that page, click **"CONTINUE"**.

Please note:

- A 1099 consolidated tax statement is issued by your brokerage and contains all relevant tax information, including distributions and gains. Some systems do not automatically provide a consolidated tax statement to you. You may need to use a system like Coin Tracker or a similar service that will summarize your sales. Some of these are free and some are paid services.



https://www.cointracker.io/

If you did NOT sell stocks, bonds or other property, click **"No"** and then **"CONTINUE".**

Investments

Stocks, Mutual Funds, Cryptocurrency, Collectibles, etc.
Form 1099-B or broker statements — BEGIN

Other Capital Gains Distributions
Capital gains that are not reported on the other forms — BEGIN

Capital Loss Carryover
Unused prior year capital loss — BEGIN

Sale of Main Home Worksheet
1099-S/closing documents — BEGIN

CONTINUE

Capital Gains Transaction

Form belongs to
Jane Doe

Description of Property *

Date Acquired *

☐ **Alternate Option:** If Date Acquired is not known, leave the date blank and select an option here

Date acquired *

Date Sold *

☐ **Alternate Option:**

☐ Check here if a short sale.

Date sold *

Sales Price

☐ * **Alternate Option:** If Sale Price is Expired, leave the sales price blank and select an option here

In this next section, if you have any income in the categories listed, click **"Yes"** and then click **"CONTINUE"**.

Please note:

- If you were a half-time or full-time student at a technical or trade school or college, **AND** your scholarships are greater than your tuition, click **"Yes"** in this **"Additional Income Section"**. You will enter these amounts in the "Other Compensation" section, NOT the "Other income that hasn't been entered yet" section.

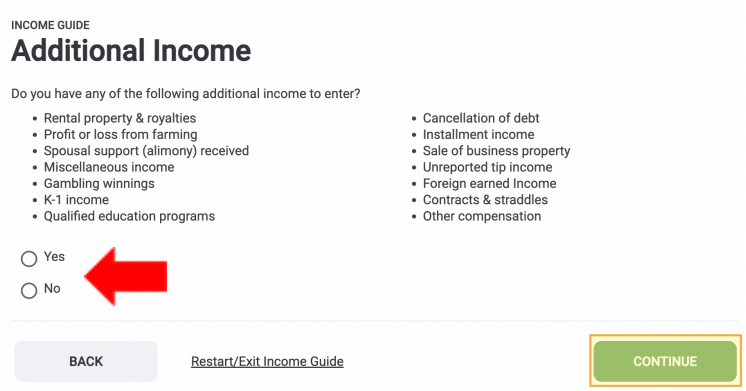
If you indicated **"Yes"**, in the following pages it will ask you about:

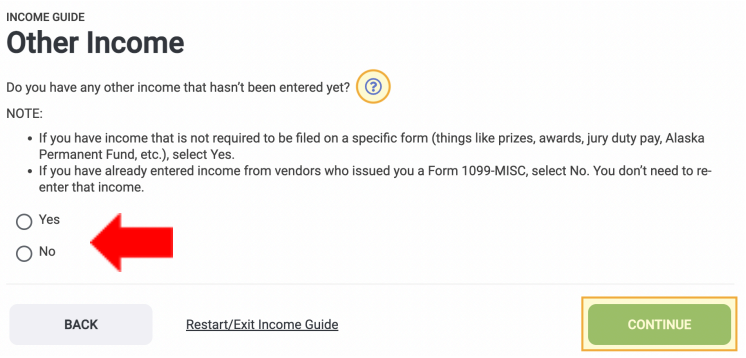
- If you owned any rental properties or received royalties in 2023
- If you owned a farm or received a Form 1099-G with an amount in box 7
- If you received spousal support (alimony) in 2023
- Other income that hasn't been entered yet (things like prizes, awards, jury duty pay, Alaska Permanent Fund, etc.)
- Gambling Winnings
  - This includes winnings from lotteries, casinos, and raffles.
- Schedule K-1 (Partnerships—Form 1065, S-Corporations—Form 1120S, or Beneficiaries of trusts and estates—Form 1041)
- Other Compensation (Includes taxable **scholarships and grants)**

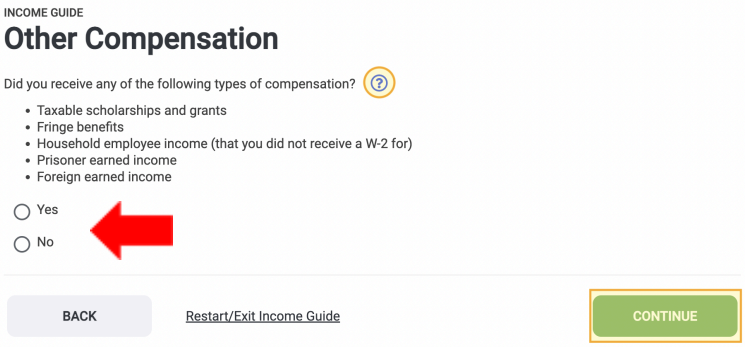
If one of these apply to you, then click **"Yes"**. If not, click **"No"** and then **"CONTINUE"**.

Please note:

- Click the question mark icon for additional information.







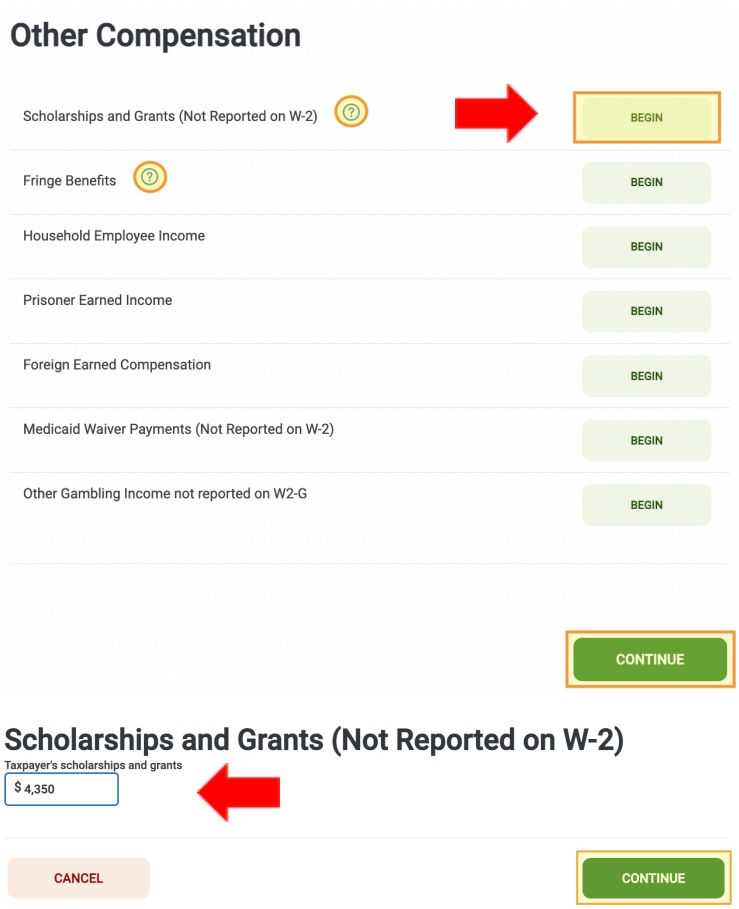
For college students:

Your taxable scholarships and grants are usually reported to you on Form 1098-T in box 5. If you used all of your scholarships and grants for tuition and course-related expenses, this is **NOT** taxable income. You would only need to report an amount as taxable scholarships if you used it to pay for other expenses, such as room, board, and travel.

With this in consideration, if you have taxable income to report from scholarships and grants, follow the steps below:

1. Under the **"Other Compensation"** section, click **"Yes"** and **"CONTINUE"**.
2. Click **"BEGIN"** next to **"Scholarships and Grants (Not reported on W-2)".**
3. Enter your total scholarships and grants. If you need help figuring out the totals, use this spreadsheet.

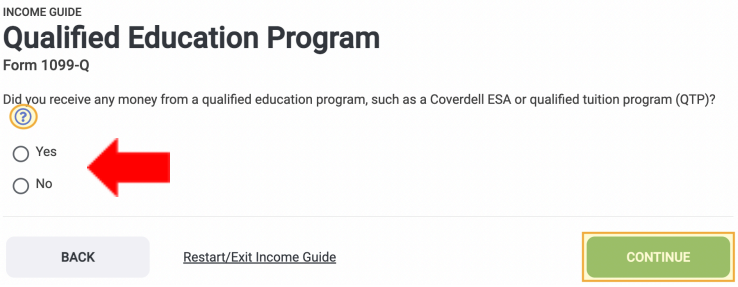
Click **"CONTINUE"**.

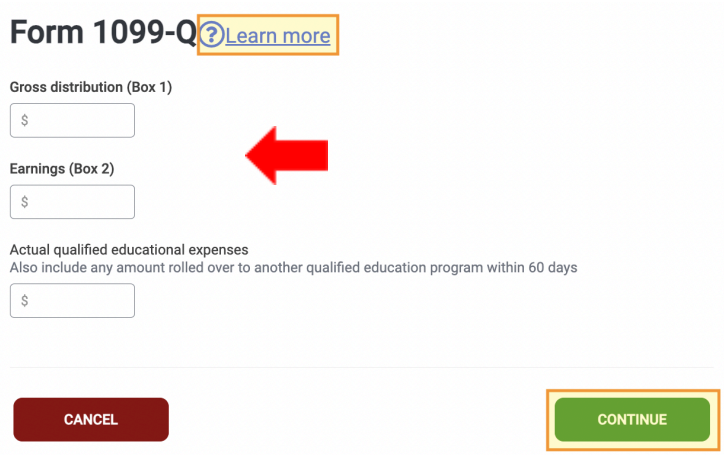
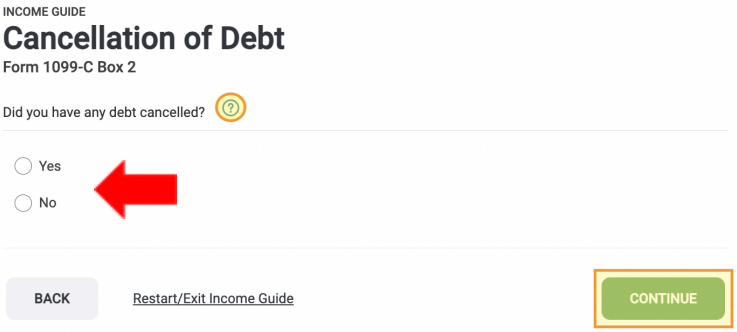
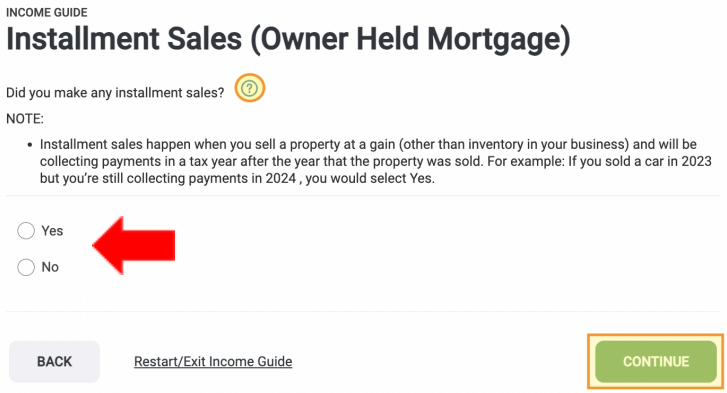


If you received money from a qualified education program, click **"Yes"** and enter your tax information from your 1099-Q. If not, click **"No"** and then **"CONTINUE"**.

Please note:

- Qualified education programs should report all amounts distributed to you on a Form 1099-Q. Generally, only the earnings in box 2 are subject to tax.
- You must first determine what part, if any, of the distribution is taxable before you know what to do with the form. To determine if your distribution is taxable, you need to know how much you paid for qualifying tuition, related fees, books, and



room and board. Which is larger, the gross distribution in Box 1 of your 1099-Q or the amount of qualifying expenses that you paid for tuition and related fees? ○ If the two amounts are equal, or if the amount of Qualifying Expenses is larger, your distribution is not taxable, and you don't need to report this on your return. Retain the Form 1099-Q for your records. ○ If the amount in Box 1 is larger, A portion of the distribution is taxable. You will need to enter that portion as taxable income.	
If you had any cancellation of debt in 2023, click **"Yes"**. If not, click **"No"** and then **"CONTINUE".** **<u>Please note:</u>** ● The IRS considers canceled debt to be a form of income, since you received money or property and never had to pay it back. If you had debt canceled, you should receive a Form 1099-C that reports the amount of the debt canceled in box 2.	
In the following pages, you will be asked you about: ● Installment Sales (Owner Held Mortgage) ● Sale of Business Property ● Unreported Tips ● Contracts & Straddles ● Foreign Earned Income Exclusion (Form 2555) If one of these apply to you, then click **"Yes"**. If not, click **"No"** and then **"CONTINUE"**. **<u>Please note:</u>** ● Click the question mark icon for additional information.	

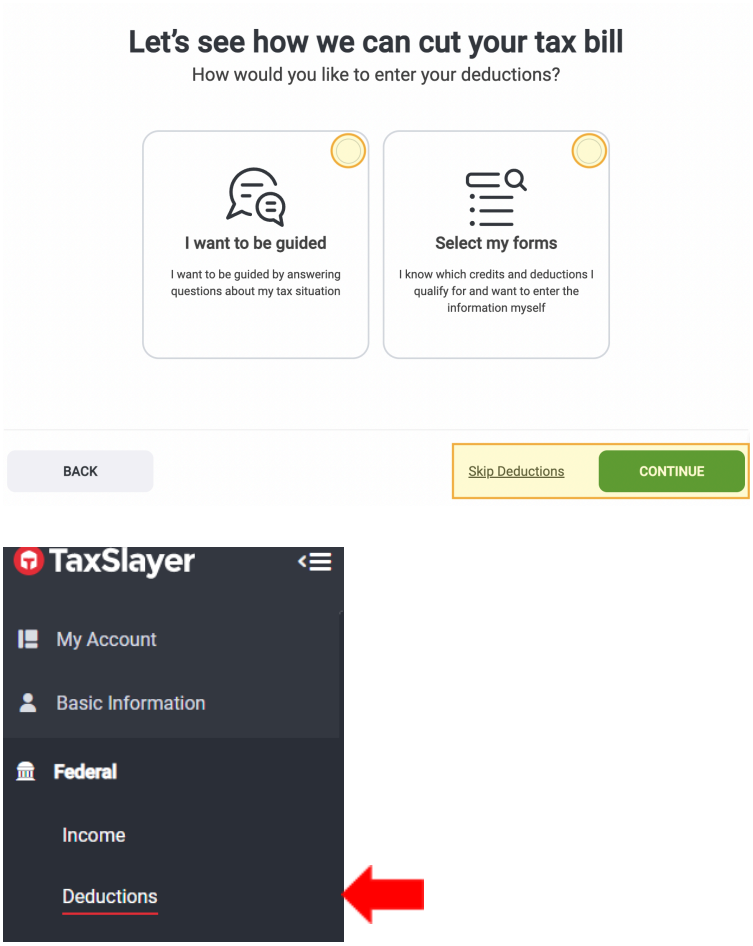
Step 5: Maximize Your Refund by entering in credits and deductions like donations to charity, school expenses, medical or service animal expenses, business expenses and more.

Deductions help reduce what you owe in taxes, and some provide you with a cash back refund.

Click **"I want to be guided"** if you are not sure which credits and deductions you qualify for. Then click **"CONTINUE"**.

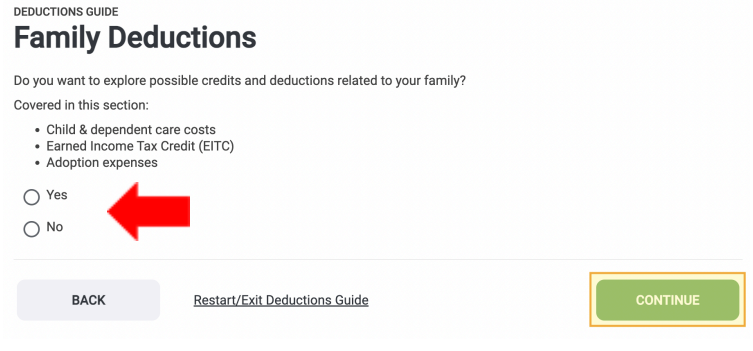
Please note:

- If you log out and log back in, you can go directly to this section, by clicking the toolbar on the left, then the "Deductions" category under the "Federal" section of the return.



Custodial parents and former foster youth ages 25+ may qualify for the Earned Income Tax Credit.

Click **"YES"** to explore the possible credits and deductions related to you and your family.

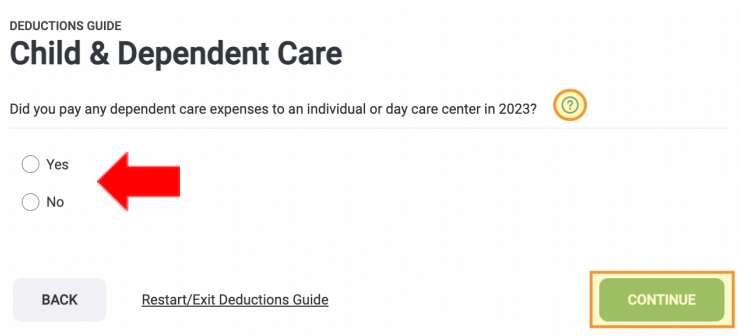


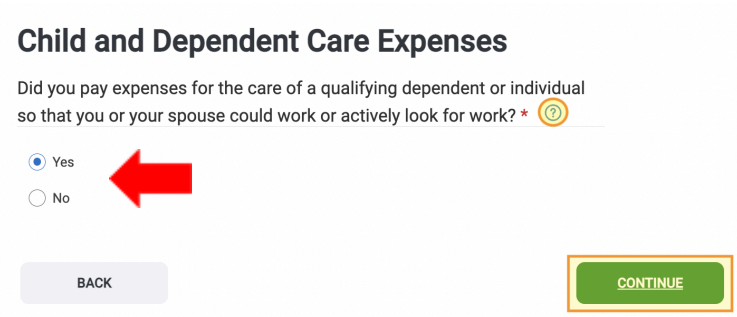
If you paid for child care or the care of a dependent out of your own pocket to be able to work or actively look for work, click **"Yes"** and then **"CONTINUE"**. If not, click **"No"** and then click **"CONTINUE"**.

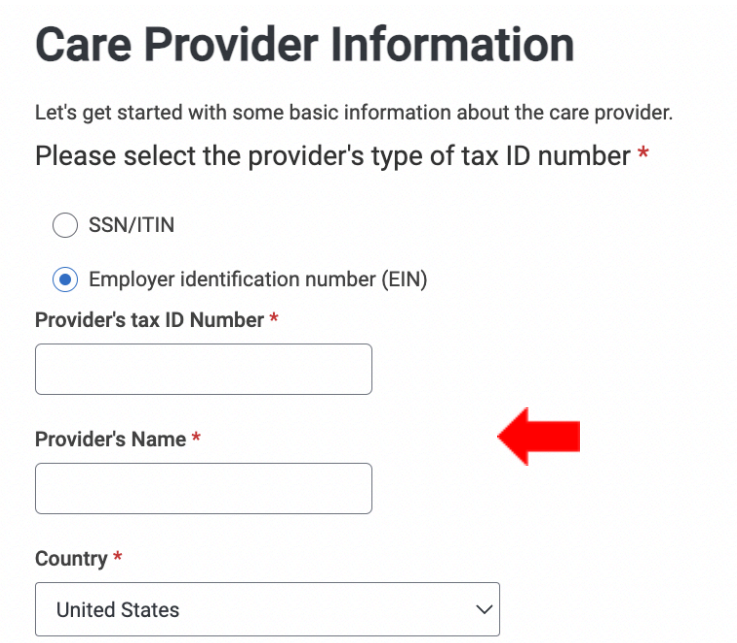
Please Note:

- To claim this deduction, you must identify all persons or organizations that provide care for your child or dependent. You will be asked to include the name, address, and SSN or the employer identification number of the care provider on your return. If the care provider is a tax-exempt organization, only include their name and address. You can use Form W-10, to request this information from the care provider.
- If you can't provide information regarding the care provider, you may still be eligible for the credit.
- For tax year 2023, you may be eligible for 35% of child care or similar costs up to a maximum of $3,000 for 1 qualifying child under the age of 13 or up to $6,000 for 2 or more qualifying children! You may also be able to claim this credit for care paid for a spouse or other qualifying dependent who was physically or mentally incapable of self-care. Read more on the IRS website here.

If you clicked **"Yes"**, you will enter the care provider's information and then the amount you paid for each dependent in the following pages.



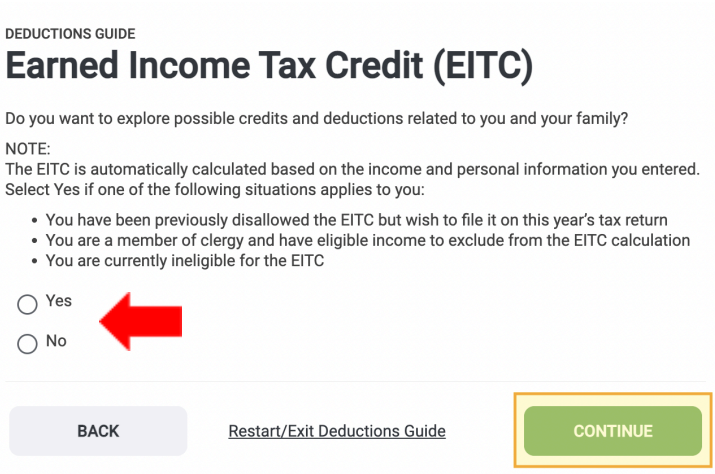




The EITC is automatically calculated based on the income and personal information you entered. You **DO NOT** need to fill this section out **UNLESS** one of the following situations applies to you:

- You have been previously disallowed the EITC but wish to file it on this year's tax return
- You are a member of clergy and have eligible income to exclude from the EITC calculation
- You are currently ineligible for the EITC

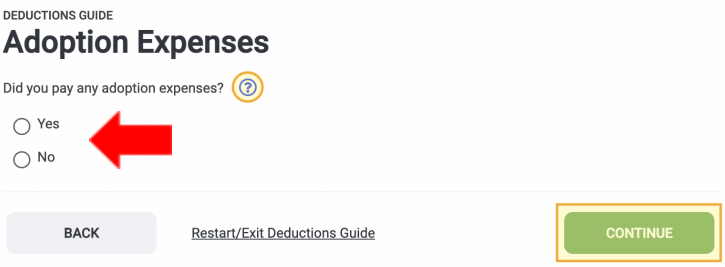
If one of these situations apply to you, then click **"Yes"**. If not, click **"No"** and then **"CONTINUE"**.



If you paid any adoption expenses, click **"Yes"** and then **"CONTINUE"**. If not, click **"No"** and then click **"CONTINUE"**.

Please Note:

- To claim this credit, the adoption generally must have become final during 2023. However, you can also claim this credit if you paid expenses in 2023 for an adoption that didn't become final in 2023.

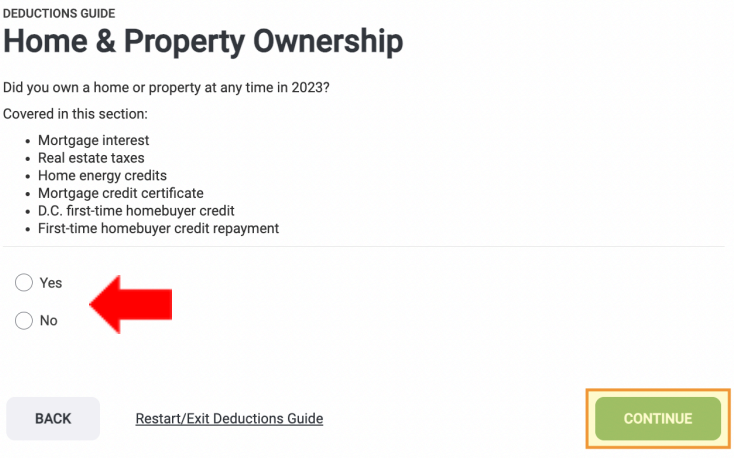


Did you own a home or property at any time in 2023? Select **"Yes"** or **"No"**.

If you answered **"Yes"**, in the next sections you will be asked about:

- Mortgage interest
- Real estate taxes
- Home energy credits
- Mortgage credit certificate
- D.C. first-time homebuyer credit
- First-time homebuyer credit repayment

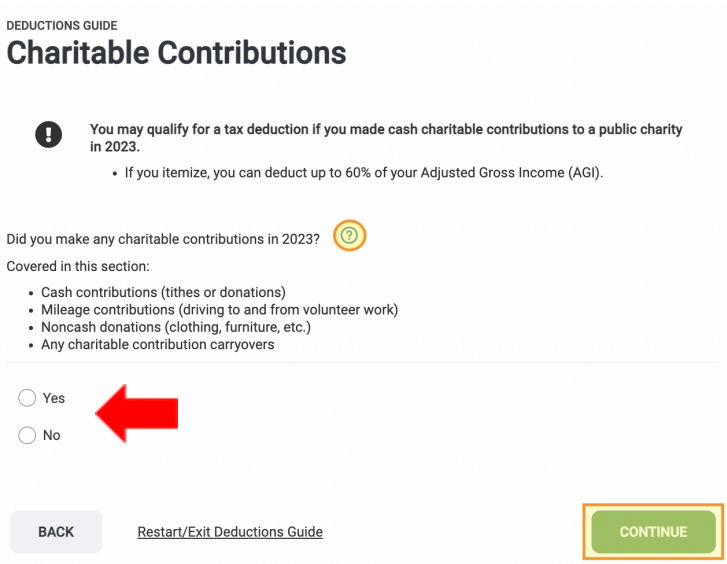
In each of these sections, you will indicate **"Yes"** or **"No"** and then click **"CONTINUE"**.



Charitable Contributions made in 2023 can be claimed up to $300 if you have donation receipts.

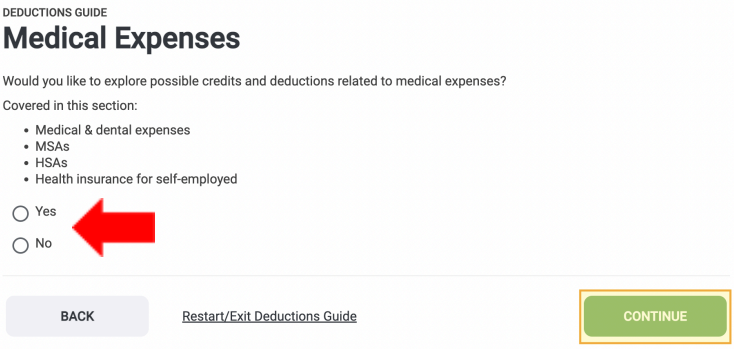
Please note:

- You can deduct contributions or gifts that you may have made to various organizations during the tax year. Qualifying contributions can be made in cash, property (clothing, furniture, household items, or vehicles), or out-of-pocket expenses (such as mileage) you paid to do volunteer work for a qualifying organization.
- Charitable contributions are an itemized deduction. If your itemized deductions do not surpass your standard deduction, the refund will not be impacted.



Did you have a service animal or out of pocket medical and dental expenses?

Indicate **"Yes"** or **"No"** and then click **"CONTINUE"**.

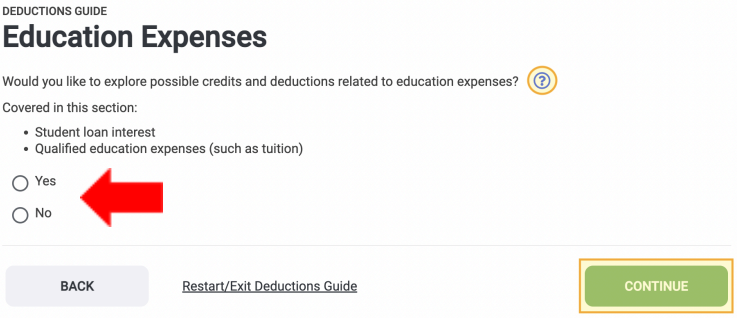


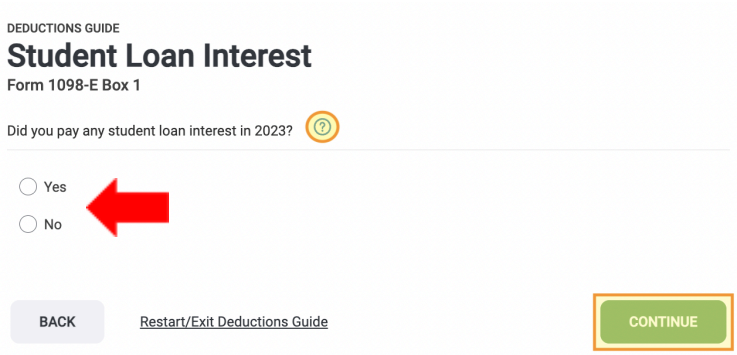
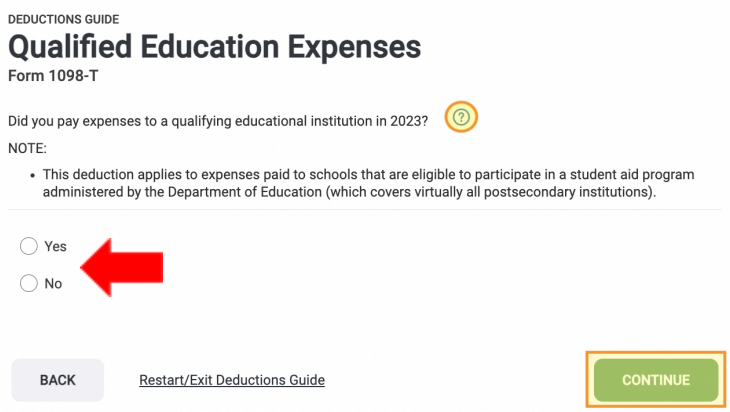
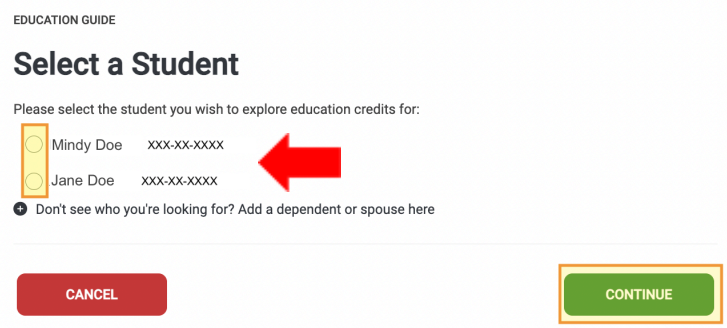
Did you pay for tuition, books, fees, and school supplies for higher education or career training? In this next section, check out credits and deductions specific to college students.

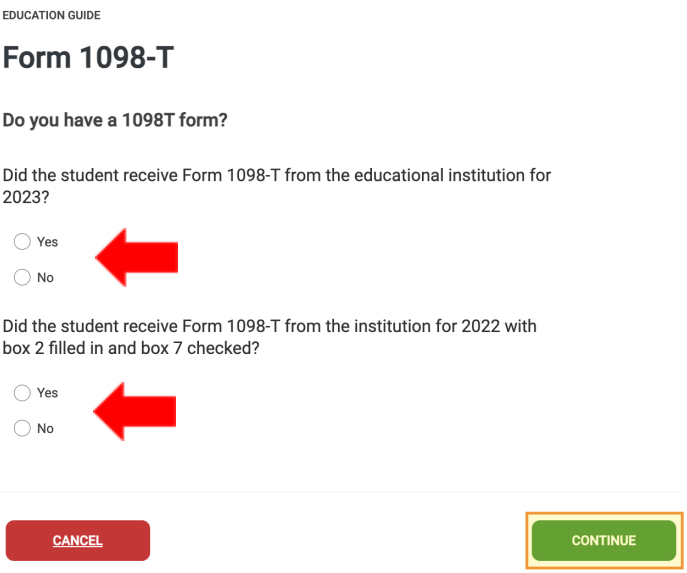
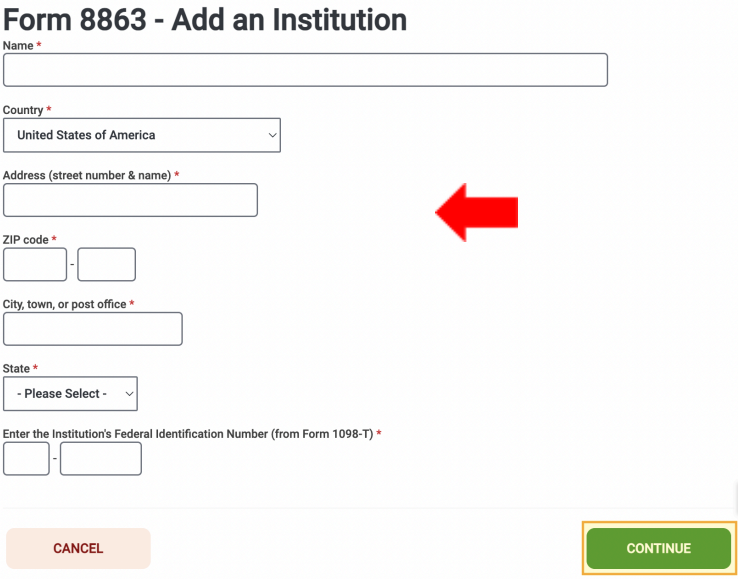
Please note:

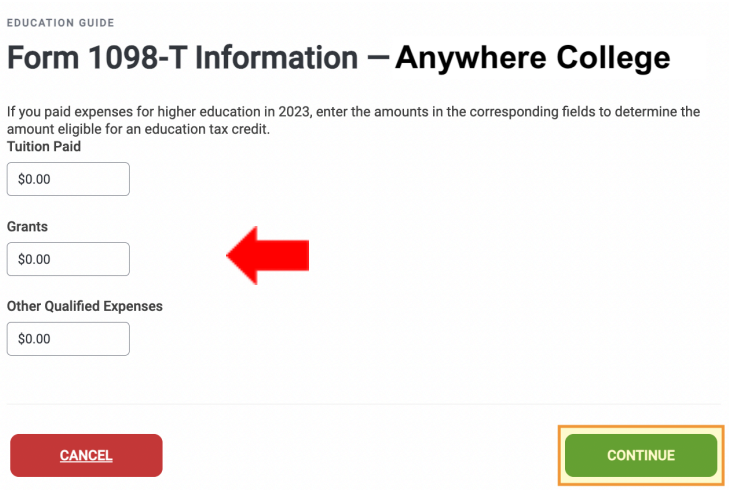
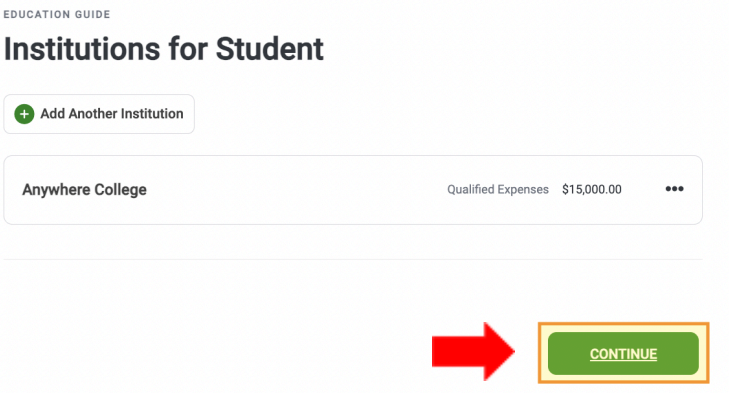
- Click on the question mark icon before selecting "Yes" to learn more.

Click **"Yes"** then **"CONTINUE"**.



If you paid any student loan interest in 2023, click **"Yes"** that you paid qualifying education expenses. **<u>Please note:</u>** • You should typically receive Form 1098-E that reports any student loan interest you paid. The amount you are eligible to deduct is usually the amount in box 1. Click **"CONTINUE"**. In the next page, you will input the total interest paid on qualified student loans.	
Click **"YES"** that you paid qualifying education expenses. Click **"CONTINUE"**. **<u>Please note:</u>** • Generally, you can deduct qualifying education expenses that you paid for yourself, your spouse, or any dependent that you are claiming on your return. • You should receive Form 1098-T from your school listing your qualifying tuition and fees. If you did not receive a 1098-T, contact your education institution.	
Select the student you would like to explore education credits for, then click **"CONTINUE"**.	

Answer the questions about your 1098-T form. **<u>Please note:</u>** • If you do not have the form, you can request it from your educational institution. Click **"CONTINUE"**.	
Enter your school's information from the 1098-T. Click **"CONTINUE"**.	

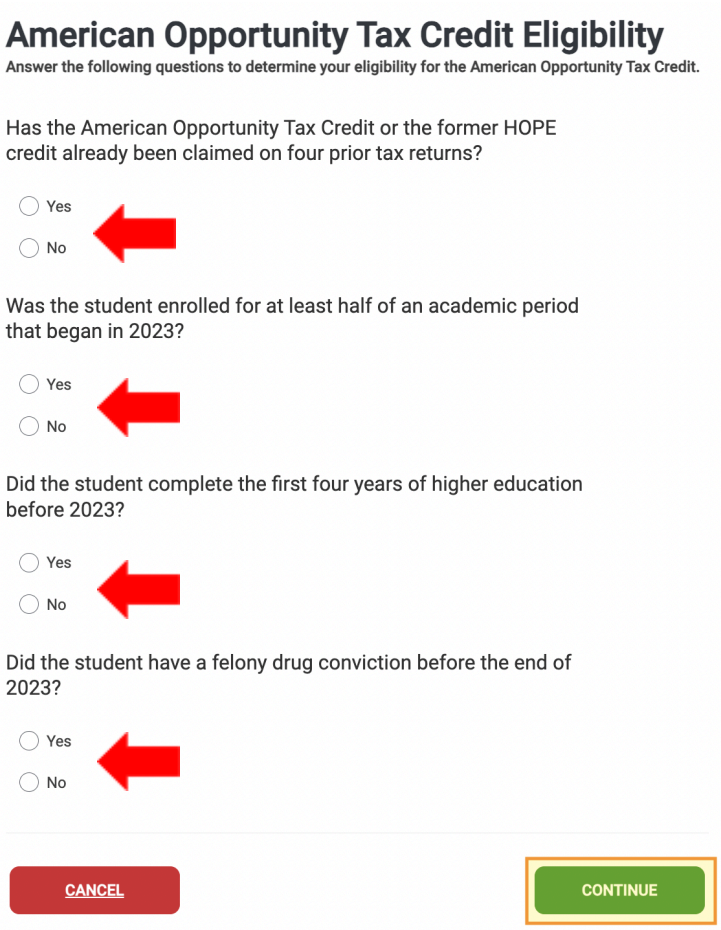
Enter any tuition paid, grants and other qualified expenses. Click **"CONTINUE"**.	
Click **"CONTINUE"**.	

Confirm that you are eligible for the **American Opportunity Tax Credit (AOTC)** by answering the four eligibility questions.

Please note:

- There are two credits available to individuals that qualify to claim a credit or deduction for qualified education expenses paid during the tax year: the **American Opportunity Tax Credit (AOTC)** and the **Lifetime Learning Credit (LLC)**. You may claim only one on your tax return for each student.
- The American Opportunity Credit:
  - Maximum credit of $2,500 per eligible student
  - 40% refundable / 60% nonrefundable
  - Modified Adjusted Gross Income Limits: $180,000 Married Filing Jointly / $90,000 Single
  - Available for 4 years only; only available if the first four years of post-secondary school not completed before the current tax year
  - Student must be pursuing an undergraduate degree and be enrolled at least half-time
  - No felony drug convictions

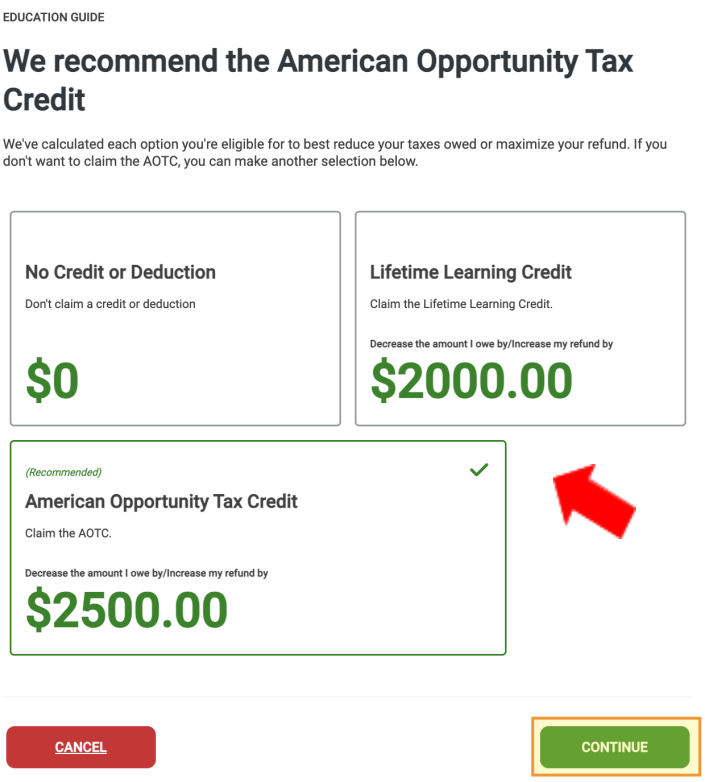
Click **"CONTINUE"**.



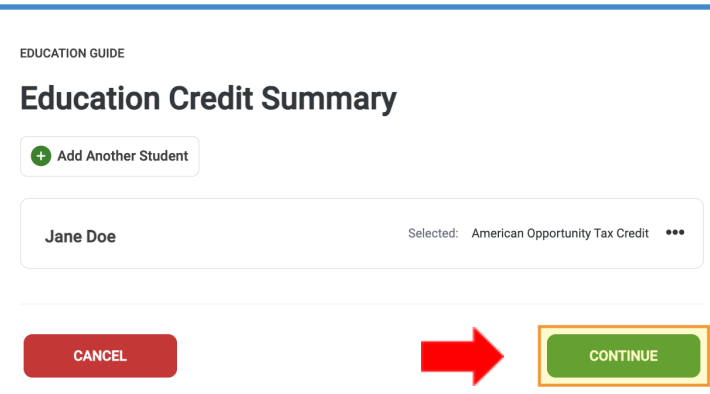
If you qualify for the AOTC, click **"CONTINUE"**. If you believe this is incorrect and believe you should receive the LLC, click **"Lifetime Learning Credit"** then click **"CONTINUE"**

Please note:

- The Lifetime Learning Credit:
  - Maximum credit of $2,000 per return
  - Nonrefundable credit (reduces tax owed; does not increase refund)
  - Modified Adjusted Gross Income Limits: $180,000 Married Filing Jointly / $90,000 Single
  - Available for all years of post-secondary education for unlimited number of years
  - Student does not need to be pursuing a degree; not required to be enrolled half-time



Click **"CONTINUE".**



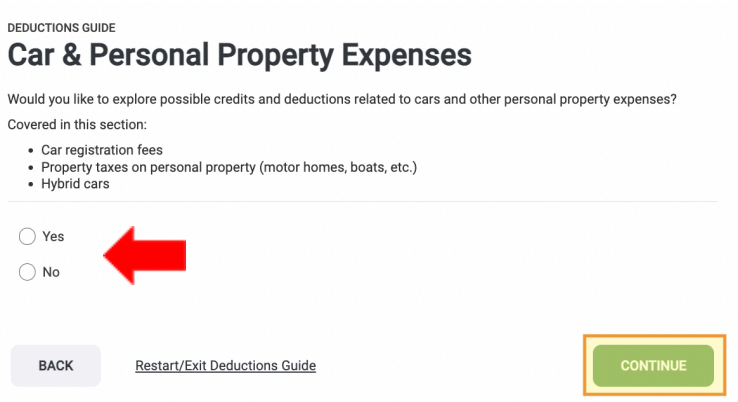
In the next sections, deductions will be covered under the following categories:

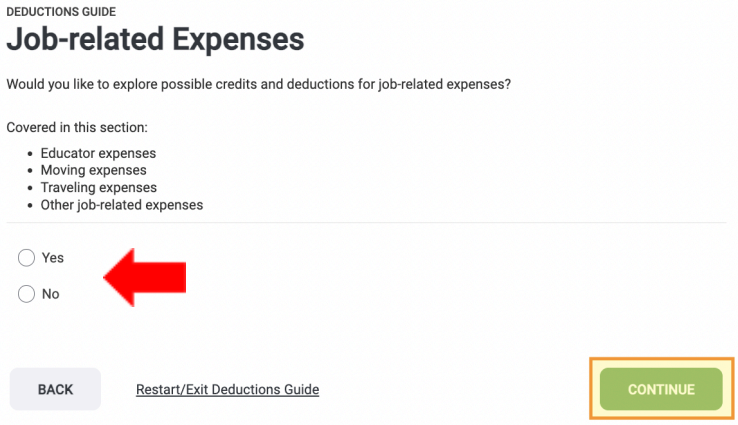
- Car & Personal Property Expenses (Ex: car registration fees)
- Job-related Expenses
- Various Tax Payments (Ex: If you paid for a tax extension)
- Retirement Investments (Ex: Retirement savings contribution credit, also known as the Saver's credit)
- Casualties and Thefts
- Elderly or Disabled Credit
- Alimony Paid
- Other Deductible Expenses
- Early Withdrawal Penalty
- Other Miscellaneous Deductions

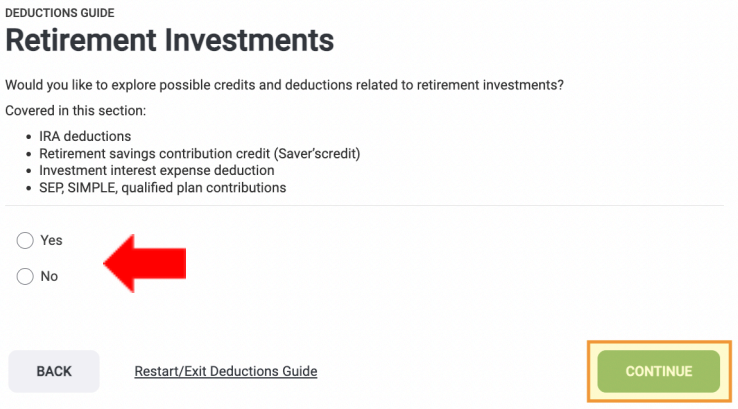
In each of these sections, you will indicate **"Yes"** or **"No"** and then click "**CONTINUE**".

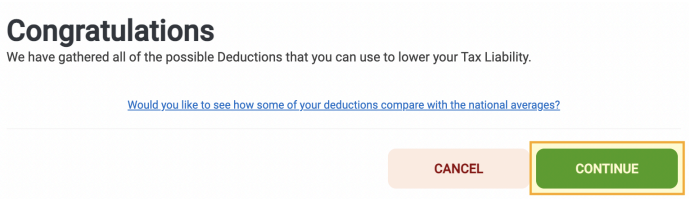
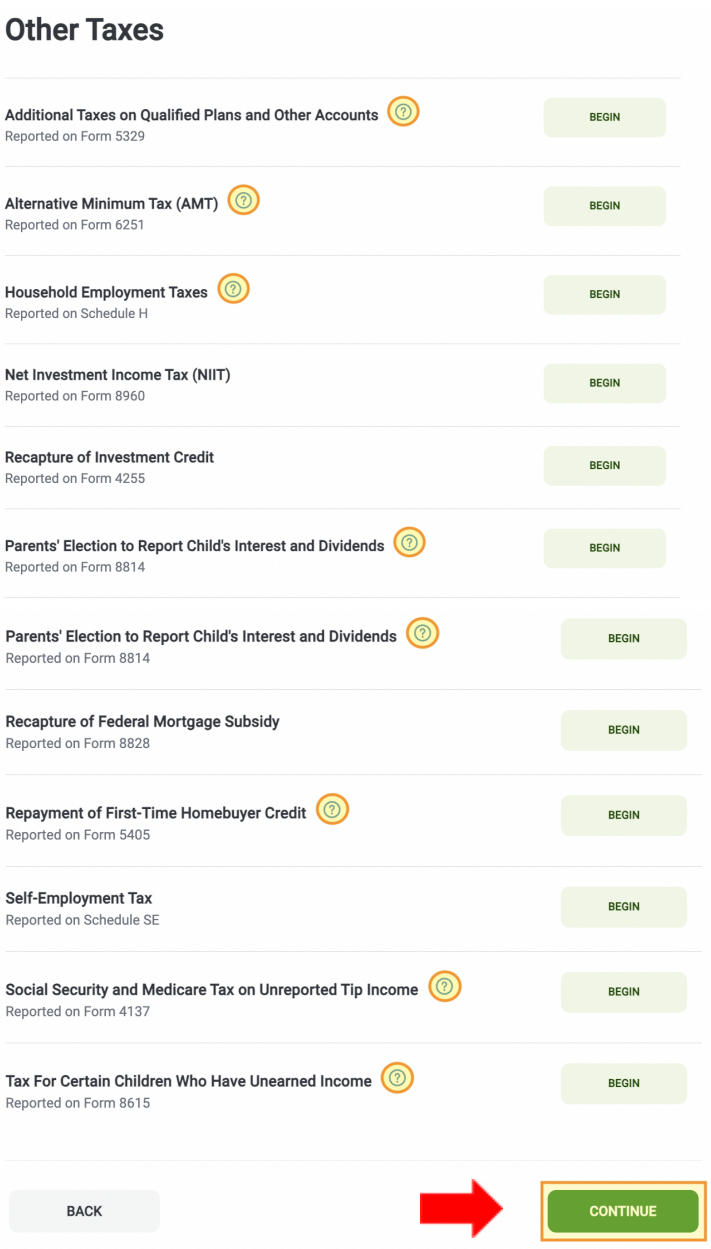
Please note:

- Click the question mark icon on any of these pages if you need additional information.





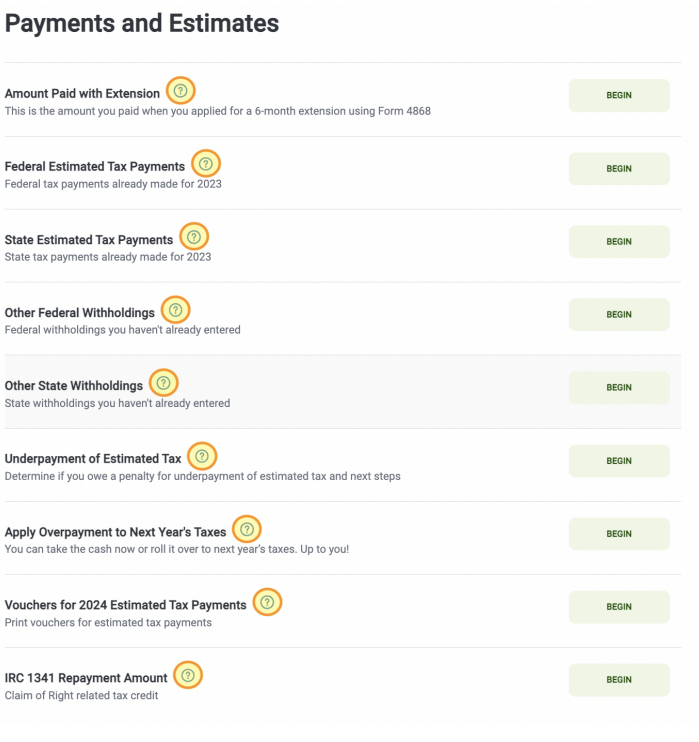


Click "**CONTINUE**".	
In the next section, you will be asked about any Other Taxes. If any of these categories apply to you, click **"BEGIN"** next to that category. If not, click "**CONTINUE**". **<u>Please note:</u>** • Click the question mark icons if you need additional information.	

In the next section, you will be asked about Payments and Estimates. If any of these categories apply to you, click **"BEGIN"** next to that category. If not, click "**CONTINUE**".

Please note:

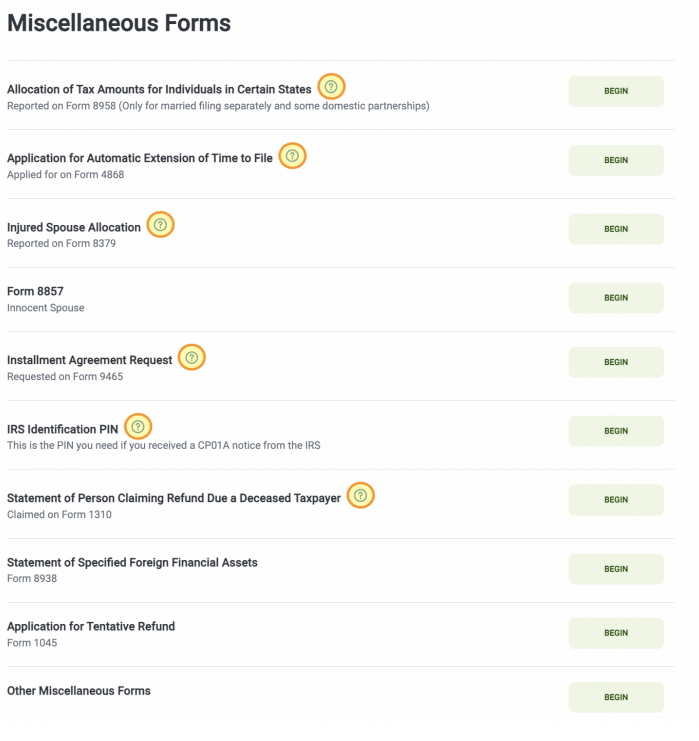
- Click the question mark icons if you need additional information.



In the next section, you will be asked about Miscellaneous Forms. If any of these categories apply to you, click **"BEGIN"** next to that category. If not, click "**CONTINUE**".

Please note:

- Click the question mark icons if you need additional information.



Step 6: Answer the Health Insurance - Affordable Care Act (ACA) Insurance Plan Question

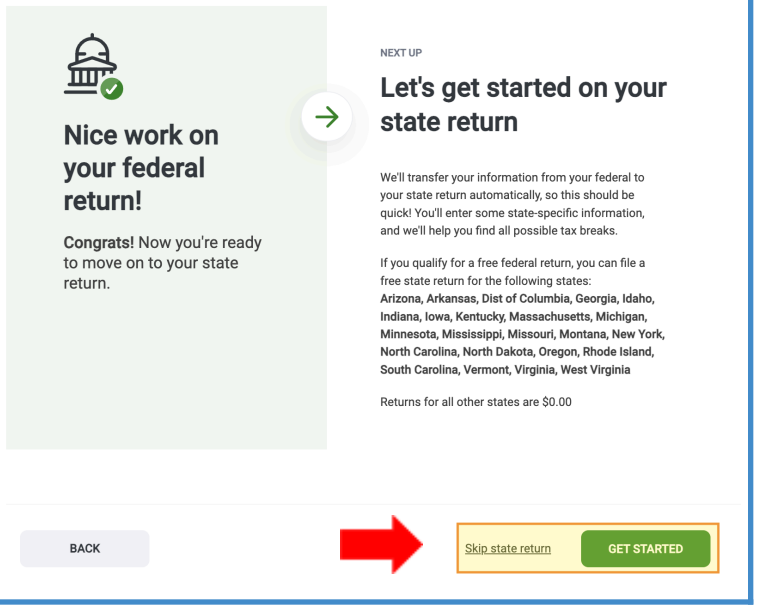
To answer the ACA 2023 Question:

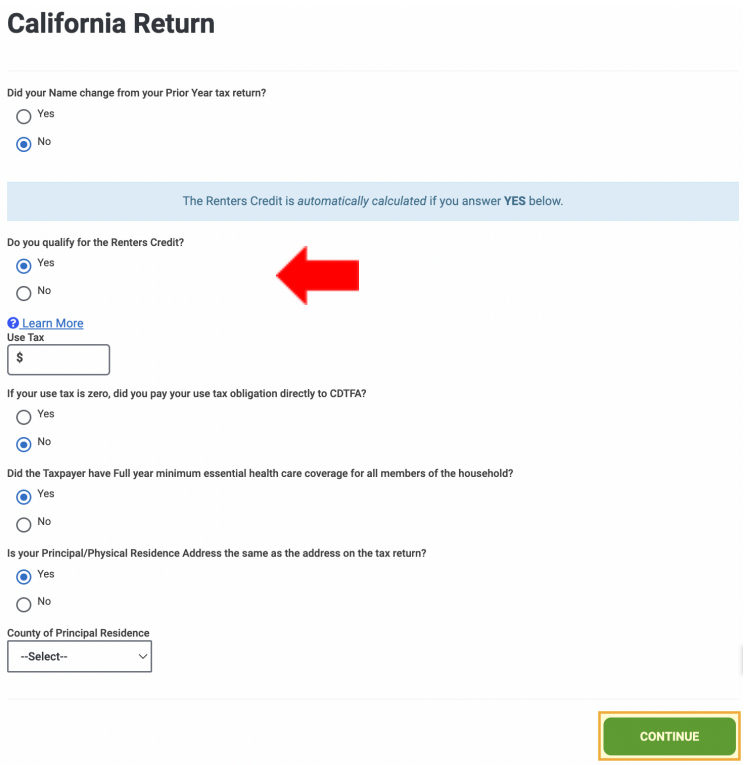
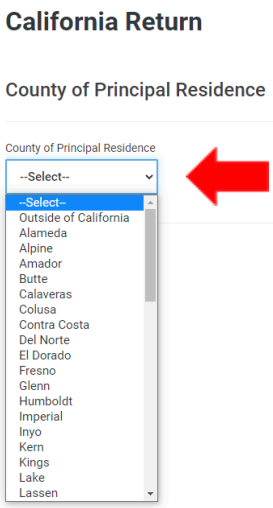
- Click **"No"** if you have full-scope Medi-Cal coverage or have insurance through your employer.
- Click "**Yes**" if you paid for health insurance using Covered California.

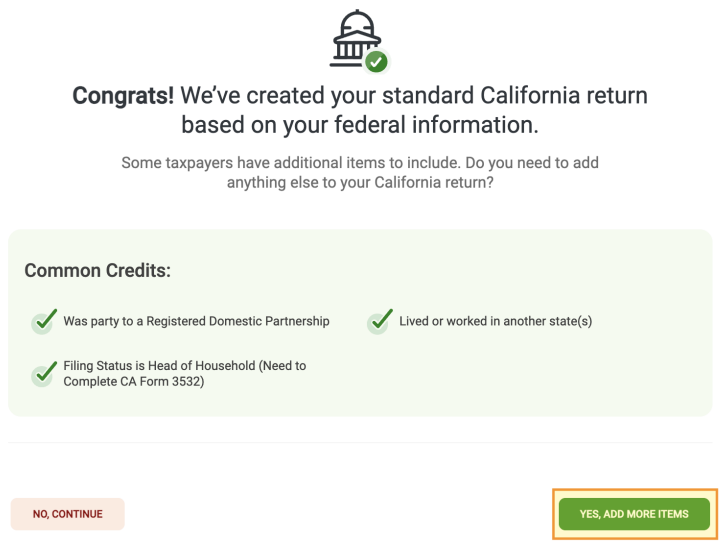
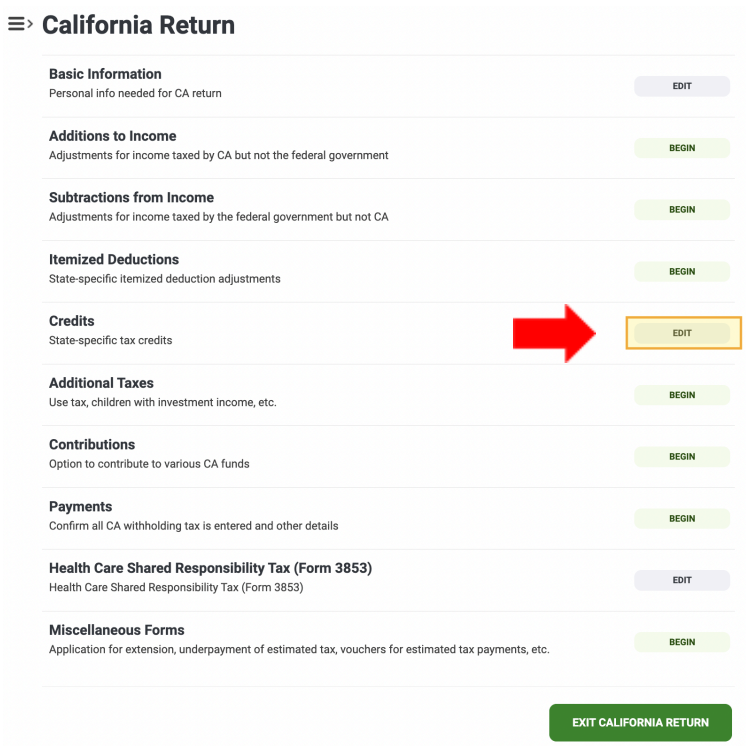
Click **"CONTINUE"**.

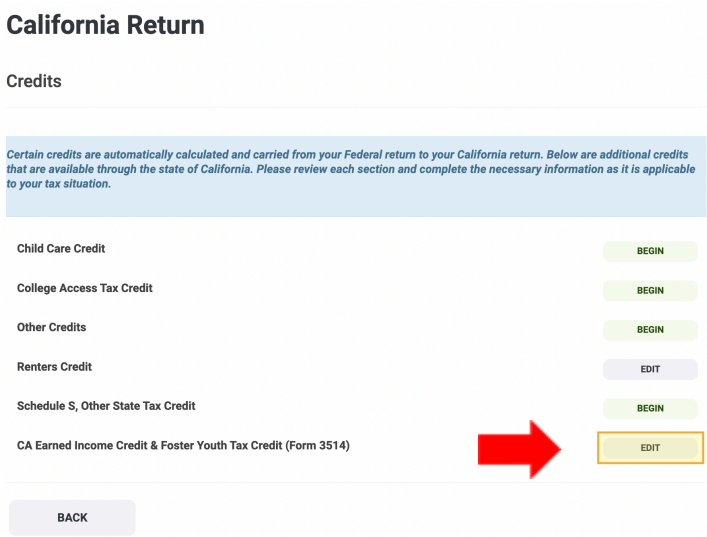
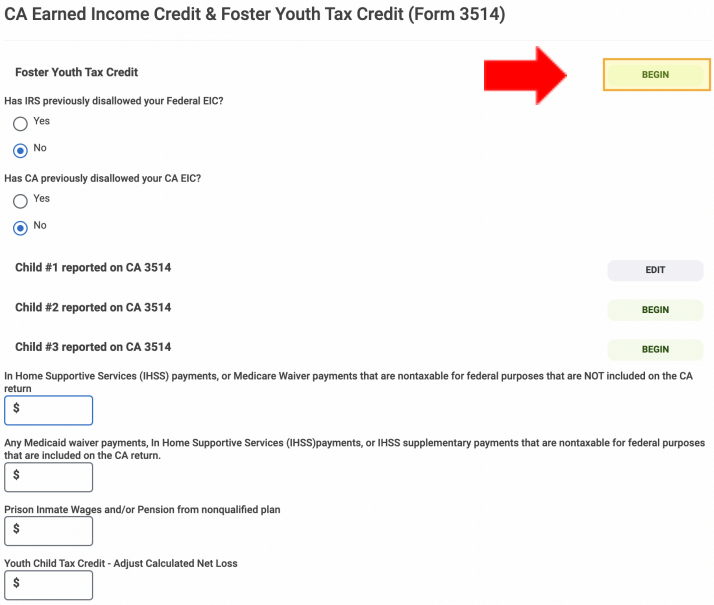
Step 7: Prepare your California State Tax Return

If you would like to file a CA state return, click **"GET STARTED"**. If you only want to file a federal return, click **"Skip state return".**



CA Renter's Credit: • Click **"YES"** if you paid rent in CA for at least 6 months of the year. • It doesn't matter if it is a little amount or through a public program—if you pay monthly rent, select **"YES"**.	
Select the county where you live from the drop-down menu. Click **"CONTINUE"**.	

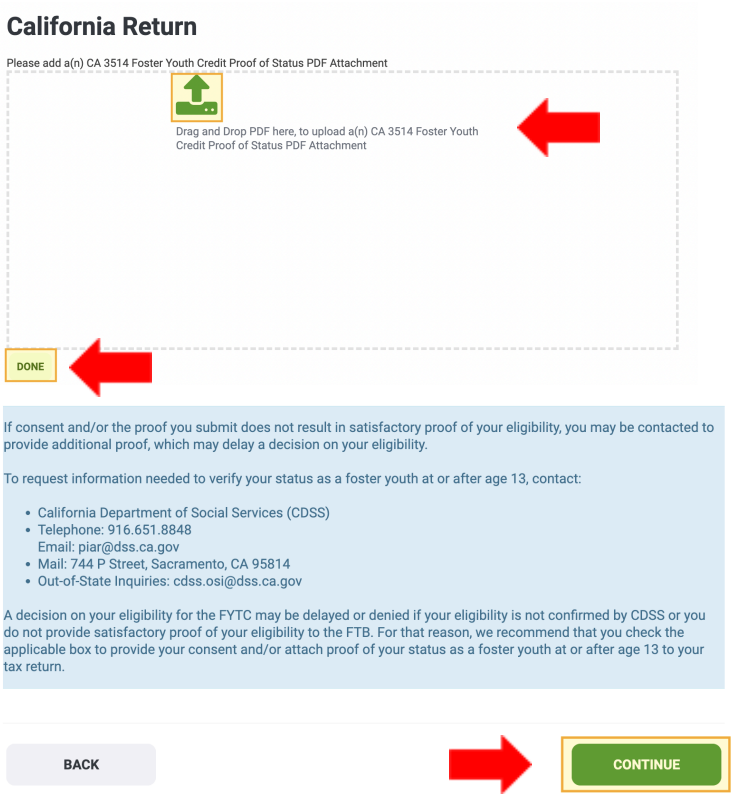
Wait! You are not done with the California return yet! Click **"YES"** to go to the main California Return page and make sure you don't miss out on any CA state-specific tax credits you are eligible for.	
California Return: Click **"EDIT"** on the "**Credits**" section to claim CA state credits.	

To claim the Foster Youth Tax Credit, click **"EDIT"** on the "**CA Earned Income Credit & Foster Youth Tax Credit**" category.	
On the upper right-hand corner of the page, next to where it says "Foster Youth Tax Credit", click **"BEGIN"** to go to the main Foster Care Tax Credit page.	

Click **"Yes"**, that you are eligible for the Foster Youth Tax Credit. Click **"Yes"** to give consent for staff to verify you are eligible for the Foster Youth Tax Credit.	**California Return** CA Foster Youth Tax Credit Foster Youth Tax Credit Eligibility A qualified taxpayer that is at least 18 years old and younger than 26 years old as of the last day of the taxable year and is one who was in foster care while 13 years of age or older in an AFDC-FC placement, as described in Section 11402 of the Welfare and Institutions Code (AFDC-FC placements include an approved home a relative, a nonrelative extended family member, a licensed family home of a nonrelative, a licensed group home or short-term residential therapeutic placement, the home of a nonrelated legal guardian, a transitional housing placement for minors or a transitional housing placement for nonminor dependents, an out of state group home, a supervised independent living placement), including a tribally approved home, as defined in subdivision (r) of Section 224.1 of the Welfare and Institutions Code, or Approved Relative Caregiver Funding Program eligible placement, as described in Article 6 (commencing with Section 11450) of Chapter 2 of Part 3 of Division 9 of the Welfare and Institutions Code, by a Title IV-E agency, pursuant to a voluntary placement agreement or a juvenile court order. Is the Taxpayer eligible for the Foster Youth Tax Credit? (•) Yes ( ) No Taxpayer - Do you give consent and authorize the California Department of Social Services to share limited information about you with the California Franchise Tax Board for purposes of verifying your eligibility for the FYTC? (•) Yes ( ) No
If your name changed since you were in foster care, type in your first, middle initial, and last name while in foster care. This is so you can be verified correctly. ***Otherwise***, leave it blank.	If the Taxpayer's name was different while in foster care than name on tax return (FTB relies on the information entered on the tax return to verify taxpayer eligibility for the credit), enter that information below: Taxpayer's First Name while in foster care if different than what is on the tax return Taxpayer's Middle Initial while in foster care if different than what is on the tax return Taxpayer's Last Name while in foster care if different than what is on the tax return
If you have proof of foster care (verification letter or ward of the court letter), click **"BEGIN".** On the next page, upload the PDF letter and click **"DONE"**. Then click **"CONTINUE"** on the following page.	**If you are providing consent above, you may attach to this return a PDF letter issued by a county or state agency confirming each individual who claims the FYTC status as a foster youth at or after age 13, or other proof of status as a condition of receiving the FYTC. Below are samples of other proof/supporting documentation that may be provided:** • **CDSS Foster Care Verification Form** • **County-issued Letter** BEGIN

Please note:

- Keep the CA Department of Social Services contact information in case you need it later.

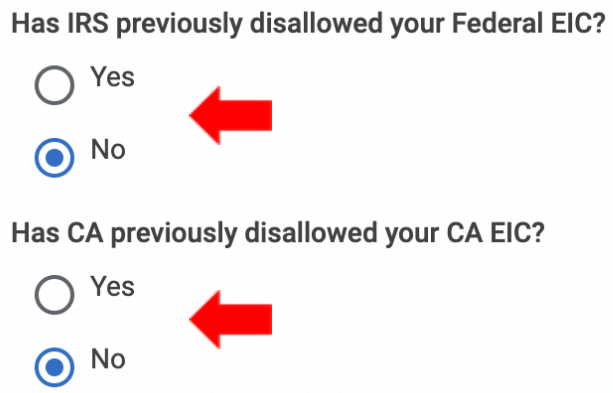


Click **"NO"** or **"YES"** to "Has the IRS previously disallowed your Federal EIC"?
Click **"NO"** or **"YES"** in response to "Has CA previously disallowed your CA EIC?"

Leave the rest of the questions blank unless they apply to you.

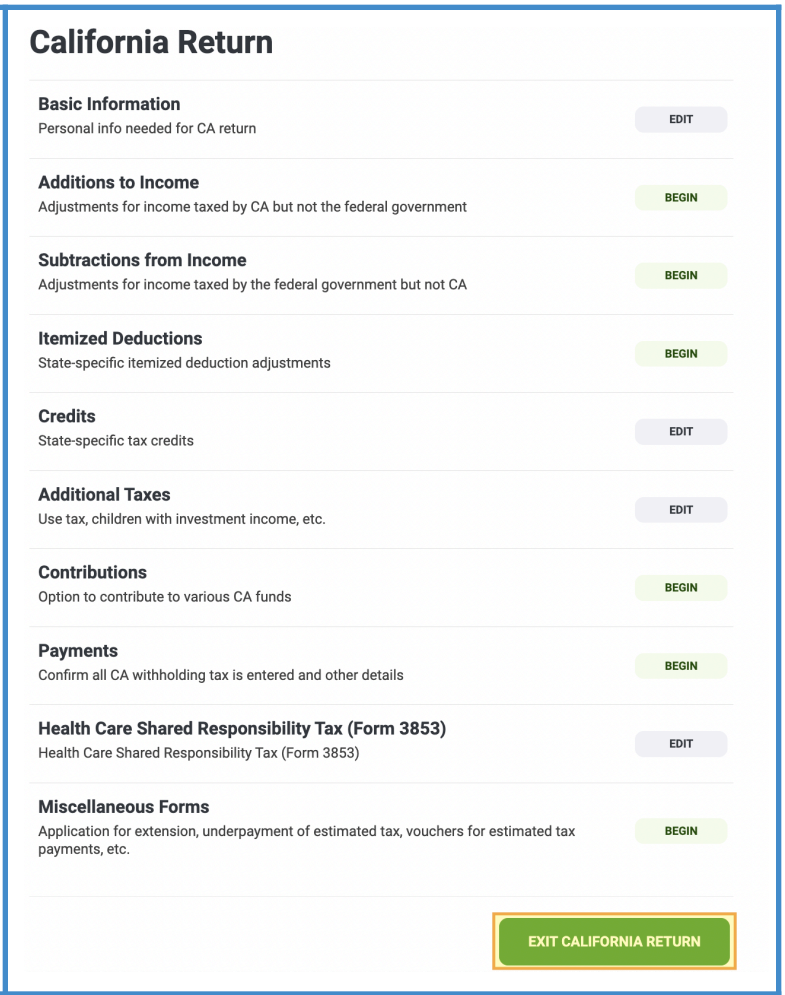
Click **"CONTINUE"**.

When you are redirected to the **"Credits"** page, click **"Back"** if you are done checking through CA state credits. If not, click **"Edit"** or **"Begin"** next to the other categories under **"Credits"**.

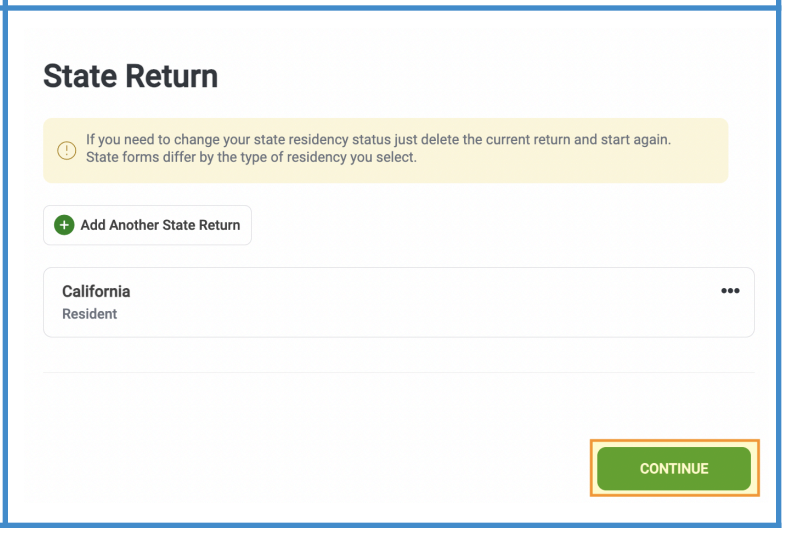


Make sure to enter any additional information that may apply to your personal circumstances on your State Return.

Once you are done, with the previous sections, click on **"EXIT CALIFORNIA RETURN"**.



Click **"CONTINUE"**.

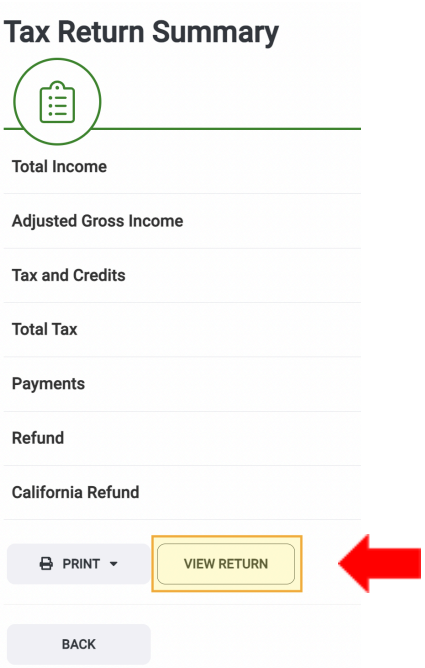


Make sure to double-check that any credits you were eligible for are reflected in the summary (e.g. Earned Income Tax Credit, Child Tax Credit, Education Credits, CalEITC, Young Child Tax Credit, Foster Youth Tax Credit, Renters Credit, etc.)

Please note:

- Review your Total Income, Tax Credits and Refund Amounts by clicking **"View Return"**.

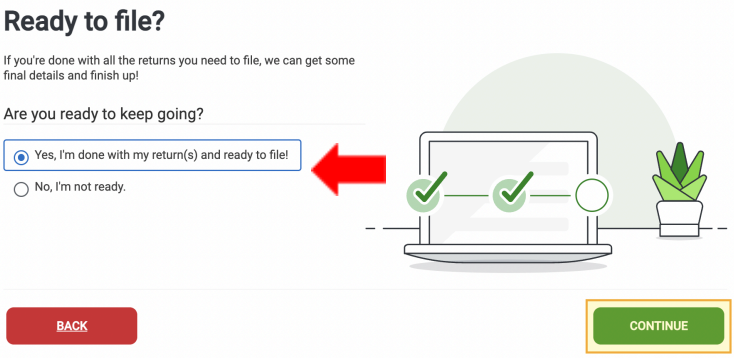
If everything looks okay, then click **"CONTINUE"**.



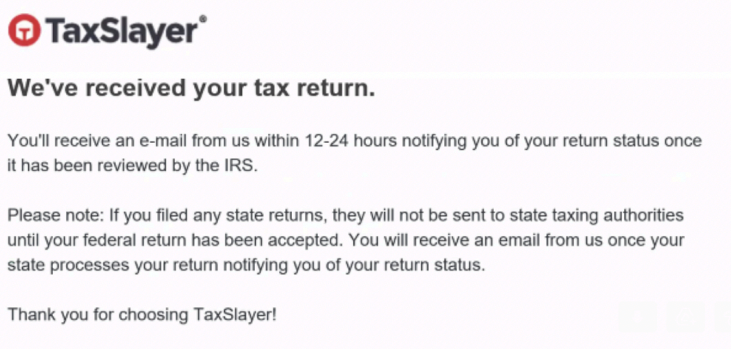
File Your Return. Click **"Yes, I'm done with my return(s) and ready to file!".**

Please note:

- Make sure you have your Adjusted Gross Income (AGI) from the prior year tax return, which allows you to file your return electronically.
- If you do not know your AGI, you add up how much money you earned last year.

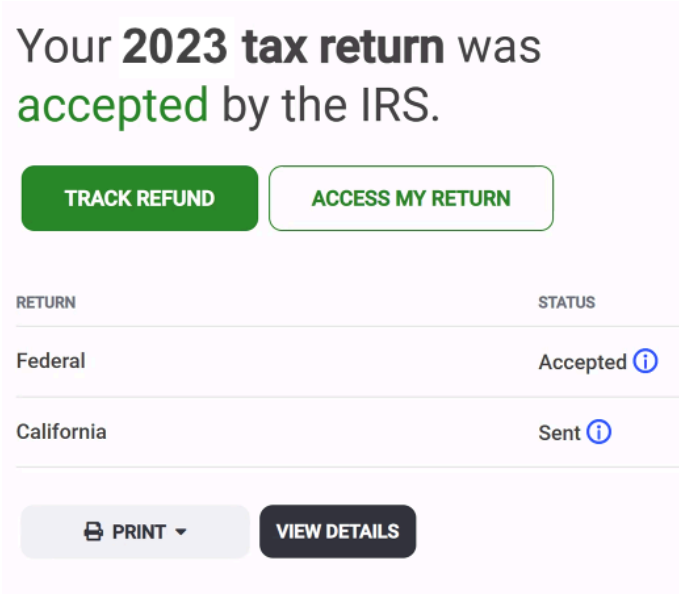


When your Federal and/or state return(s) have been processed, ***an automatic notification is sent to the e-mail address*** associated with your account as well as to the mailbox within your account located in the navigation menu on the left side of the screen. ***If you did not receive the email notification***, please be sure to add TaxSlayer to your safe senders list so that our messages are not delivered to your SPAM or JUNK folder.



Check the status of your return

Log in to your account from the TaxSlayer **homepage** and access your Federal and/state return(s) directly from the **"My Account"** screen. If the status says **"Sent"**, it means your return was received but has NOT yet been accepted. If the status says **"Accepted"**, that means your return has been received AND accepted.

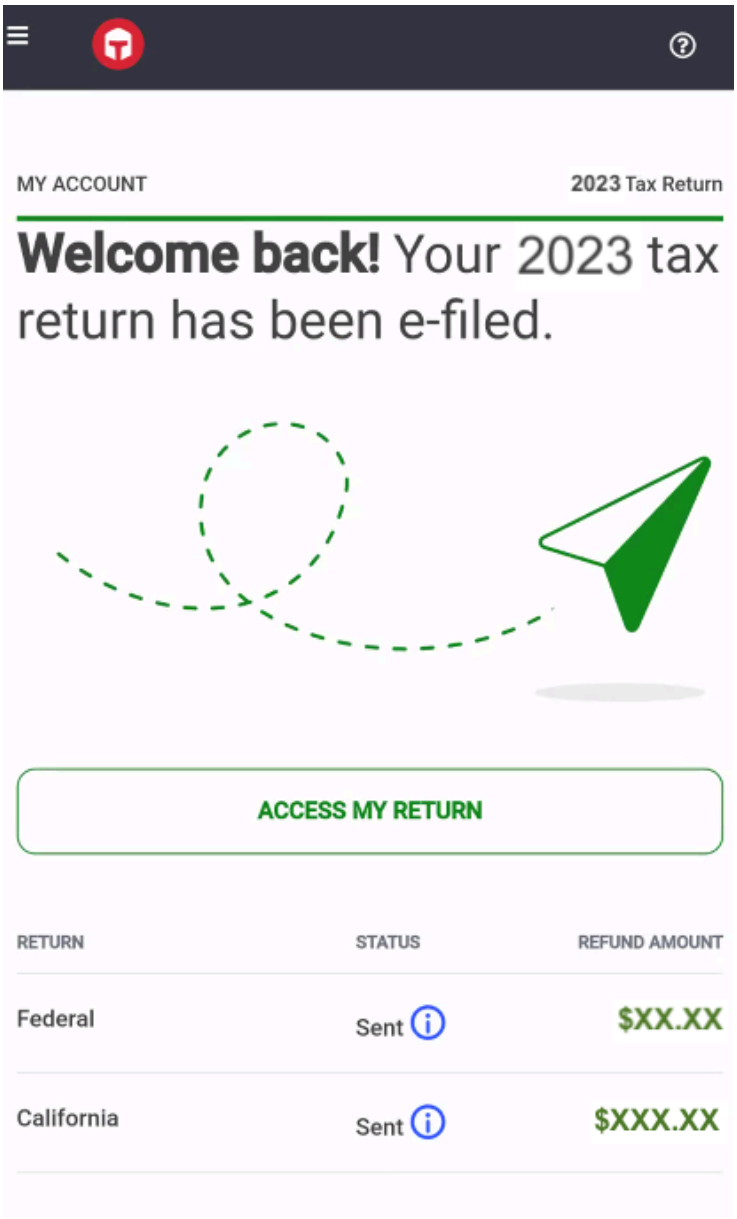


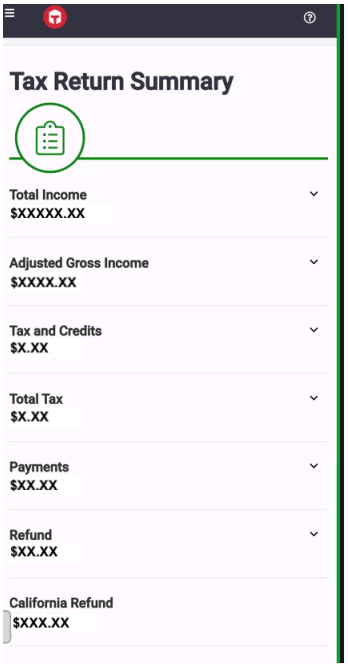
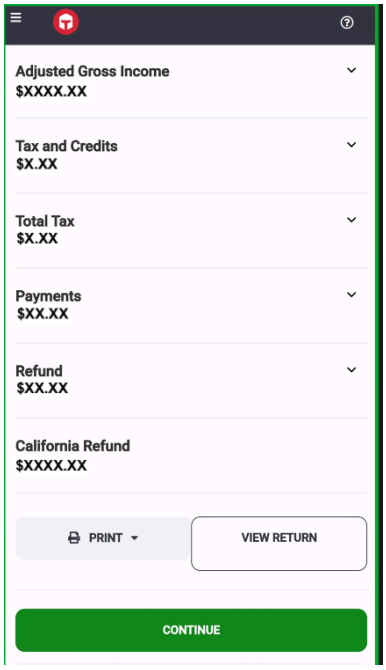
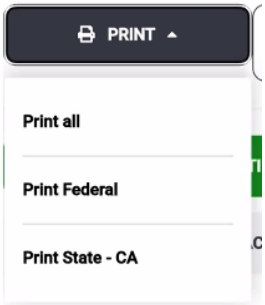
Print your return

Once your Federal and/or state return(s) have been accepted, you will be able to log in to your account from the TaxSlayer **homepage** and access your accepted Federal and/state return(s) directly from the **"My Account"** screen. You will click on **"Access My Return"**.

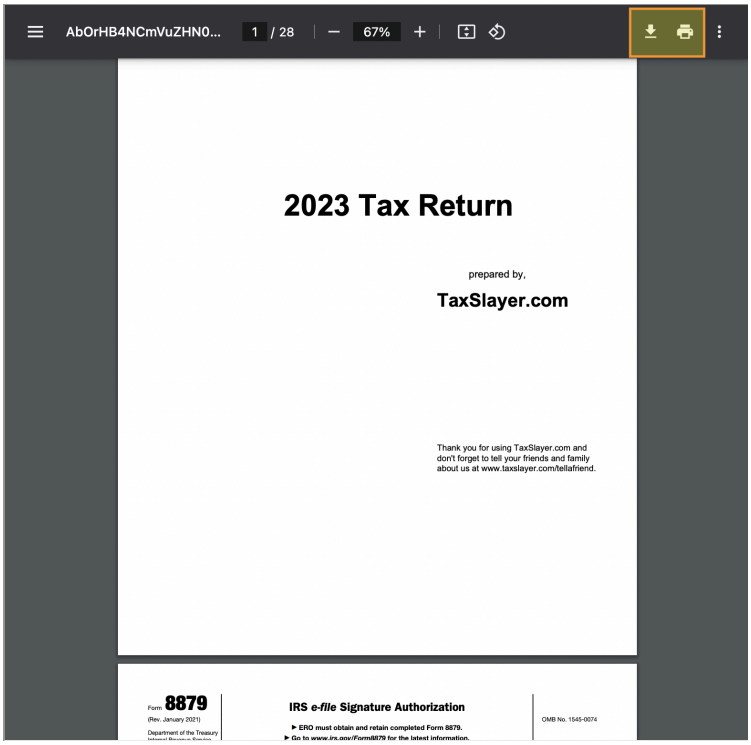
Please note:

- Save a copy of your return and your tax documents and receipts on a password protected computer, or print a copy and save your return in a locked filing cabinet along with your tax documents.



Click on the toolbar on the left and then click on **"Summary/Print"**. When you see the summary, scroll down and click on **"PRINT"**.	 
Select **"Print all"**.	

You can save your return on your computer or phone as a PDF or print it.

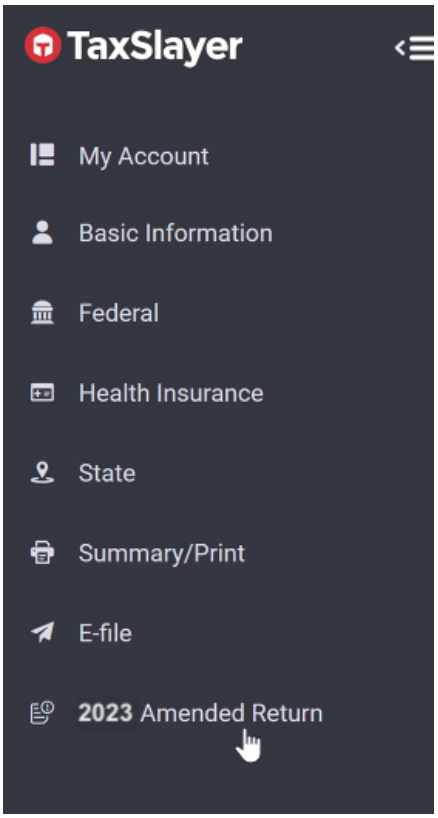


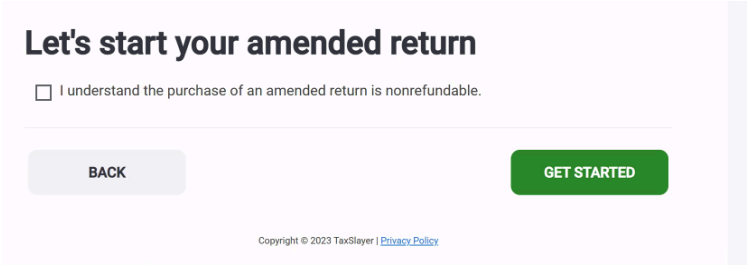
Filing an Amended Tax Return using TaxSlayer

Did you already file but need to file an Amendment? You may have missed a document, chosen the wrong filing status, not claimed a dependent, or missed a credit or deduction. If so—follow the directions below to correct your tax return. *Please note, TaxSlayer only allows filing and amending current year returns.*

To start amending your return, select **"E-file"** in the main navigation menu. Then, select the "**2023 Amended Return"** menu item that appears below it in the navigation menu.

Check the box that says, **"I understand the purchase of an amended return is nonrefundable"**. Click **"GET STARTED"**.





Once you have completed your amended return, select **"CONTINUE"** at the bottom of the Amended Return menu to choose how you wish to file it. If you choose to e-file, complete the process to file your Amended Return the same way as your Federal Return.

Need to check the status of your refund?

Federal Refund Status:
To check the status of your federal refund, visit the IRS website by clicking the following link: "Where's My Refund?". You can also check the status of your federal refund by phone by calling the IRS Refund Hotline at 1-800-829-1954.

CA State Refund Status:
To check the status of your California state refund, visit the Franchise Tax Board website by clicking the following link: "Where's My Refund?". You can also call the FTB customer service line at 800-852-571 on weekdays from 8 AM to 5 PM.

Need a payment plan?

If you have a large tax payment and are unable to pay it all at once, you have the ability to apply for a payment plan. First, you'll need to see if you qualify, then you'll need to apply directly with the IRS or Franchise Tax Board.

- To apply for a payment plan with the IRS (federal taxes) click here.
- To apply for a payment with the Franchise Tax Board (California) click here.

Need to contact Customer Support?

Are you running into technical issues? Contact customer support through any of the following methods:

- Website: https://myfreetaxes.com/support
- Main Helpline: 866-698-9435
  Available 7am-3pm PT daily from February 6–April 18, and 7am-3pm PT daily from April 19 – October 31.
- Email: info@myfreetaxes.com