

Free File Fillable Forms Tutorial

February 14, 2012

Free File Fillable Forms



Free File is the fast, easy,
and free way to file your federal income taxes

Resources

[FAQs](#)
[View Supported Forms](#)
[Get E-File Status](#)
[Return to IRS](#)

More About Free File Fillable Forms

These online forms are electronic versions of paper IRS tax forms.
Here's how Free File Fillable Forms works:

- It's Free
- Create a password protected login so you can sign in and out of your return
- Choose your form: 1040A, 1040, or 1040 EZ
- Do the math using the provided calculation mechanism
- E-file your return (you'll need last year's AGI or your self-select PIN). Or you may also print your return.

Note: State preparation and state efile is not available. Does not support the efilng of returns with foreign addresses.

If you're used to doing your Federal return using IRS paper forms, Free File Fillable Forms will look familiar.

Entering your information is just like filling in IRS forms.

Note: Free File Fillable Forms requires the latest version of the Adobe Flash Player. Download it [here](#).

Start Free File Fillable Forms

The screenshot displays the 'Free File Fillable Forms' web application. The main window shows the '1040EZ' form, titled 'Income Tax Return for Single and Joint Filers With No Dependents'. The form is divided into several sections: 'Personal Information', 'Income', 'Deductions', and 'Credits'. The 'Personal Information' section includes fields for name, address, and Social Security Number. The 'Income' section includes fields for 'Adjusted Gross Income' and 'Total Taxable Income'. The 'Deductions' section includes a checkbox for 'Standard Deduction' and a field for 'Standard Deduction Amount'. The 'Credits' section includes a checkbox for 'Earned Income Credit' and a field for 'Earned Income Credit Amount'. The form is displayed in a browser window with a blue header and a green footer. The footer contains the text 'Privacy Statement | www.irs.gov | Terms of Service' and a 'TRUSTe' logo.

[Privacy Statement](#) | www.irs.gov | [Terms of Service](#)



Security Certification has been performed by C-Level

Security

Above is a screenshot of the provider's Free File Fillable Forms Landing Page. You may reference this screen shot when reading sections of the tutorial.

Purpose

Free File Fillable Forms is intended to be the electronic equivalent of paper with the added benefit of being able to e-file your return. If you are comfortable filling out paper forms, which generally involves reading, understanding and following the instructions for the forms, you should find Fillable Forms familiar. Fillable Forms does not support state income tax preparation.

Note: If your 2011 Adjusted Gross Income is \$57,000 or less you may want to use brand name tax software to assist you in preparing your federal return. Use [Help Me Find a Free File Company](#) to assist you in identifying a Free File software provider you can use. The tax software from the list of Free File companies is simple to use and guides you through the tax preparation and e-file process. State tax return preparation and e-file is also available. Some companies may charge a fee for state tax returns.

The tutorial is not:

- A substitute for understanding paper forms and instructions
- Intended to be your guide on how to complete every form you'll need to file an accurate tax return.
- Intended to demonstrate how each form and schedule supported by the software will function

Rather, the purpose of this brief tutorial is to give you a general overview of the program and provide instructions on how to navigate through the forms and screens.

In order to reduce common math errors, Free File Fillable Forms will perform basic math and populate certain fields with data taken from completed portions of the tax return.

Before starting Free File Fillable Forms, you should review the known [Limitations](#) of the program. If you encounter a problem while using the program, you should look for a solution in the searchable [FAQ's](#). Finding the answer in the FAQ's is much faster than calling or emailing the IRS support desk for the answer. For your convenience, the FAQ's and known Limitations are found in the same document.

Create an Account

From the IRS.gov Free File Landing Page, select "Use Free File Fillable Forms."

Once at the Fillable Forms Landing Page (see above), look on the left navigation menu, select "View Supported Forms" to ensure the forms you need are supported and currently available.

At the bottom of the page, select the links and view the Terms of Service and Privacy information.

From the Fillable Forms landing page, review the information on the page and select the button "Start Free File Fillable Forms."

A new page will appear. Review the information on the page and select the "Continue" button.

If you are a new user, select “Create an Account” on the pop up window and enter your username, password, etc. on the next pop up window and select “Continue.” Make sure you enter a correct email address. The email address you enter is used to provide you valuable information about your Free File Fillable Forms account and tax return e-file status. You will never receive any marketing related emails.

Once you have entered your account information, select “Continue.” The next pop-up will allow you to print a copy of your account information for your records.

Note: If you are a returning user, log in with your user name and password.

Start Your Return

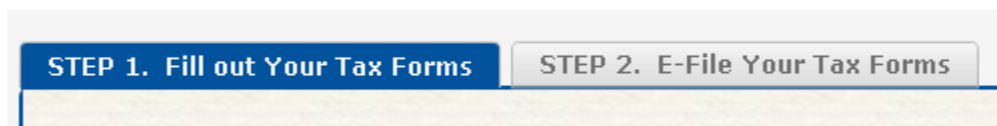
Select your 1040 form

Select the “Start 1040,” “Start 1040A,” or “Start 1040EZ” button. Remember that if you decide to change this form later, all the information you have entered on the return (except your name, address and SSN) will be deleted. If necessary, use the scroll bar to see all of the 1040 forms to select.

Navigating through Fillable Forms

Screen with Step 1 tab active

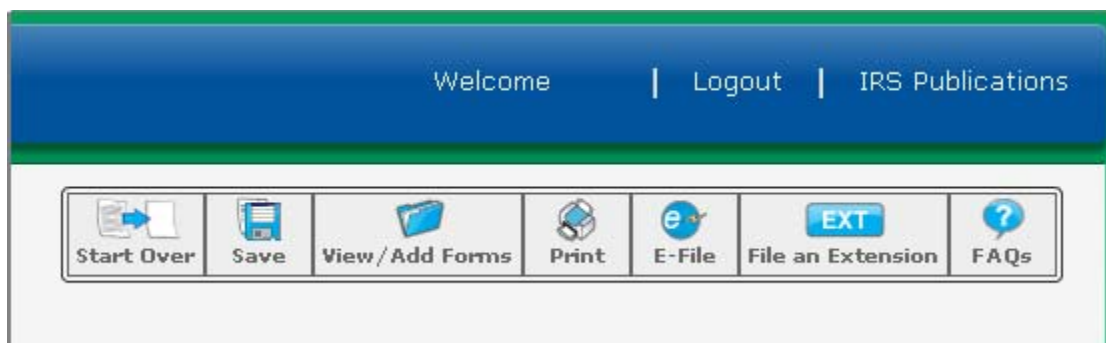
After selecting your 1040 form, it will open in your browser window. Notice there are two tabs showing in the upper left, “Step 1. Fill Out Your Tax Forms” and “Step 2. E-File Your Tax Forms”. Both tabs are displayed above your 1040 Form. Step 1 is highlighted in blue, which indicates that Step 1 is the active tab. Step 2 is grayed-out, meaning it is the inactive tab.



Step 1 tab should be active anytime you are filling out a form or schedule; or adding/viewing a form or schedule.

Selecting the Step 2 tab will make it active and open a page for inputting all the information needed to e-file your return. **(See page 8 for information on the Step 2 tab)**

While in Step 1 or Step 2, your username, the “Logout” link and the link to IRS publications will appear on the top right of the page. Important icons also appear on the top right (shown below).



Start Over – Selecting this icon will prompt if you want to clear all the data you have entered and start over.

Save – Saves the work you have done thus far.

View/Add Forms – Opens a window and allows you to (1) See and open forms you have already selected and (2) Choose additional forms.

Print – Opens a dialog box to enable printing.

E-file – Takes you to the Step 2 page (tab)

File an Extension – Opens Form 4868 to allow for filing an extension. (Note: you must first have your identifying information populated in your 1040, 1040A or 1040EZ to file this extension)

FAQs – Opens another window, which lists Frequently Asked Questions.

Your 1040 Form will appear in the middle of the page while Step 1 is selected. You may have to use the scroll bar to view all the lines on your 1040 Form. At the bottom of the Step 1 screen are additional buttons (shown below).



Instructions for this form – Will open up another window, which will display the instructions for the form you are currently working on.

Do the math – Selecting this button will perform basic calculations (addition, subtraction, multiplication, division) on the form you are currently working on. It may also update figures on your 1040 form. Please note, selecting “Do the math” button often is recommended. Selecting this button will also save your data.

Remove this form – This button is disabled when you are viewing your 1040 form. Selecting the button will remove the form you are currently working on and delete all of the information you put in it.

Print this form – Print for form that is currently showing in your screen.

Done with this form – This button is disabled when you are viewing your 1040 form. Select this button to save and close the form you are currently viewing and return to your 1040 form.

You should use the navigation links provided within Fillable Forms to:

- Move between Step 1 and Step 2
- Move from form to form
- Scroll through a page
- Save, print and exit the program.

Important - Do not use your browser’s “back” and “forward” buttons to navigate through Fillable Forms.

Use your keyboard’s “Tab” key to maneuver forward to the input fields on all forms. Using the Tab key will ensure you see all fields where input may be necessary. To go backwards, hold down the “Shift” key and hit the Tab key. You may also use your mouse to move forward and backward; however, using the mouse to move forward through the form may result in missing a field that needs information.

Tip - Begin with completing basic information in your 1040 form. Sequentially complete information on your 1040 form until the 1040 requires you to complete another form/schedule. Complete the form or schedule called for by the 1040, then return to your 1040 and pick up where you left off.

Tip – Complete your return sequentially. Do not fill in a form or schedule until it is called for by the 1040 form.

Types of Input Areas

Blank Fields – These are usually inside a box or just above an area that is underlined. When the area is selected for input, a white box with a blue perimeter will appear.

Tip – Input information in these fields by typing. Erase information in these fields by one of the following methods: (a) backspacing, (b) highlighting and deleting, or (c) highlighting and typing in new information.

Boxes – These are small boxes which may require you to “check” one or more of them to provide the required information. When selected for input, the box will have a bright blue line surrounding it. The input for these boxes is generally a “check mark.”

Tip – To put a check mark in the box, (a) use your mouse, place your cursor on the box and “right click” or (b) tap the touchpad on your laptop. To remove the check mark from a box, your mouse, place your cursor on the box and “right click” or tap the touchpad on your laptop.

Radio Buttons – These are small round circles which may require you to “fill in” the circle to provide information. When selected for input, the radio button will have a bright blue line surrounding it. Generally, you may only select one radio button to provide the required information.

Tip – To fill in the circle (a) use your mouse, place your cursor on the circle and “right click” or (b) tap the touchpad on your laptop. Selecting another radio button for the question will de-select the previous radio button. To remove the input from the selected radio button, (a) Tab back to the selected radio button and hit the “Delete” key or place your cursor on the selected radio button and hit the “Delete” key.

Light Grey Areas – Reading the instructions for the form(s) will assist in determining if you are required to input information into these areas. When the area is selected for input, a white box with a blue perimeter will appear.

Calculated Fields – These fields are populated automatically when (a) the required information is in the form(s) and (b) the “Do the math” button is selected. Generally, calculated fields cannot be overridden manually. Calculated field data may always be changed by changing the data used to calculate the field and selecting “Do the math” again.

Pre-populated Fields – These fields are populated with taxpayer identifying information (e.g., Name and SSN). Generally, these fields may not be manually overridden

Examples of Some Input Areas

The screenshot shows a tax form interface with several input areas highlighted. On the left, a vertical red box labeled "Boxes" points to four checkboxes (a, b, c, d) for "Credits from Form". A red box labeled "Light Grey Areas" points to a greyed-out field. A red box labeled "Radio Buttons" points to radio buttons for "Type: Checking Savings". The form includes sections for "Refund" and "Direct deposit?".

Adding Forms and Schedules

There are two methods of adding forms:

1. Use the “Add/View Forms” icon in the upper right of the page
2. Use the “Add” button(s) that may appear on the line of the form you are currently viewing.

Selecting an additional form from an “Add” button will immediately bring up that form.

Note: Income documents (Forms W-2, W-2G and 1099-R) cannot be selected using method 1 (above). Income document may only be added by going to the Step 2 tab and selecting their “Add” buttons found on the Step 2 page.

Selecting the **Add/View Forms** icon will open the “My Tax Forms” box, which lists your current forms. At the bottom of the “My Tax Forms” box, select “Add a Form” to bring up the forms menu. Scroll the list to find the form you want and click on it. The form will be added to your list of forms and will display on your screen.

Tip – After you have selected your additional form, close the “My Tax Forms” box to allow more room on your screen for the form to display.

When you add a new form, the previously disabled buttons at the bottom of the page for “Remove this form” and “Done with this form” will be enabled.

Selecting “**Remove this form**” will delete all the information on that form and remove it from your list of forms.

Selecting “**Done with this form**” will save the information on the form and save the form to your list of forms.

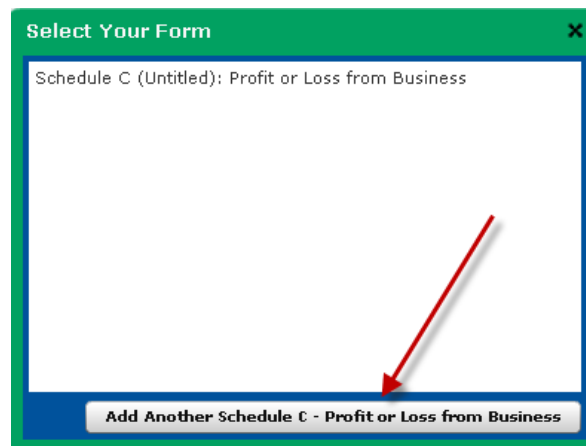
After selecting either button, you will be returned to your 1040 Form.

Buttons Now Enabled



Adding the Same Form More Than Once

To add the same form more than once, use the “Add/View Form” or the “Add” button as you did previously. Follow the prompts to see a box that will display which shows your previously added form (at the top) and a large button at the bottom that states: “Add another ...” Select the large button to add the same form again.

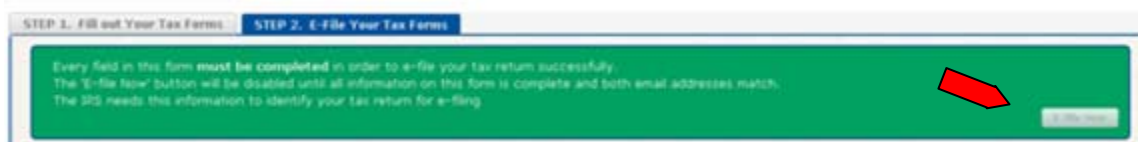


Deleting Forms from Your Return

If the form you want to delete is presently displayed on your screen, delete the form as described immediately above. If the form is not presently displayed on your screen:

- Select the Add/View Forms icon from the top right of your screen, which will open the “My Tax Forms” box
- At the bottom of the “My Tax Forms” box, select “Delete a Form” to bring up the “Delete a Form” menu.
- Scroll the list of your forms and click on the form you want to delete.
- A dialog box will appear asking if you are sure. Select “Yes” and the form and all of its information will be deleted from your return.

Step 2 E-file Your Tax Forms



Green banner and E-file button

E-file Your Return

When you are ready to e-file your return, 1) select the “Step 2” tab **or**, 2) click on the E-file icon in the top navigational bar.

The “E-file Now” Button

The E-file now button is located in Step 2, on the right side of the green banner. The button will not become active until you complete the required information in Step 2. A screen shot of the green banner is above, screenshots of the deactivated and activated E-file Now button are below.



Deactivated



Activated

When activated, selecting the E-file Now button will transmit your return to the e-file provider. The provider will then transmit your return to the IRS. After selecting the E-file Now button, you will receive a notification that your return was successfully transmitted. Generally, the IRS will acknowledge acceptance or rejection of your return within 72 hours of transmission.

There are also some buttons at the bottom of the Step 2 tab (shown below).



Electronic Filing Instructions – This button opens a new window that displays general instructions on electronic filing.

Remove this form – This button is disabled under Step 2.

Print this form – Opens up a new window for printing your forms.

Done with this form – This button is disabled under Step 2.

Income Documents

Three types of income documents need to be electronically attached to an e-file return, Forms W-2, W-2G and 1099-R. Use the “Add” button for the W-2, W-2G or 1099-R to complete them. Once the income document is opened, place your cursor in the upper left box of the income document and input the information as it is shown on the income document. Maneuver through the income documents as you would any other form. Selecting “Done with this form” will return you to the Step 2 screen.

Select the “Add” buttons to include additional W-2’s or 1099-R’s as necessary.

Only W-2, W-2G and 1099-R can be transcribed into an electronic form. You must manually total the withholding amounts from all other income documents, such as SSA-1099 and 1099 INT, and enter that total in the ‘Federal income tax withholding form other 1099s’ box, as illustrated below

The screenshot shows the 'STEP 2, E-File Your Tax Forms' interface. At the top, a green banner states: 'Every field in this form must be completed in order to e-file your tax return successfully. The "E-File Now" button will be disabled until all information on this form is complete and both email addresses match. The IRS needs this information to identify your tax return for e-filing.' Below this is the 'Required Information For Electronic Filing' section, which includes instructions to add W-2, 1099-R, and W-2G forms. There are three 'Add' buttons: 'Add W-2', 'Add 1099-R', and 'Add W-2G'. A red callout box on the right side of the form says 'Put federal withholding from other income documents here' with an arrow pointing to the 'Federal Income Tax withheld from all other 1099s' field.

Screen shot of Step 2, income documents and withholding

Additional Step 2 Requirements

In addition to adding income documents and reporting federal withholdings, Step 2 has these required inputs:

- Email Address
- Verifying Your Identity
- e-Signature
- Disclosure Statement

Verifying your Identity and Your e-Signature are related processes that include all elements of the [Self Select PIN](#) process. All taxpayers who use Fillable Forms use the [Self Select PIN Method](#) to e-file their return.

Email address – Put your email address in the space indicated. Make sure you input this address correctly; as this is the email address the IRS will use to notify you about the acceptance or rejection of your return.

Verifying Your Identity – The IRS needs you to verify you are who you say you are. This can be done three ways and you only need to provide **one** of them:

1. Prior year PIN – If you e-filed last year, enter your prior year PIN in the space indicated
2. Prior year adjusted gross income (AGI) – If you have your prior year return available, enter your prior year AGI in the space indicated
3. Electronic Filing PIN – If you do not have your prior year PIN or prior year AGI available, follow the instructions to obtain an Electronic Filing PIN and enter it in the space indicated. For more information, Go to [Get My Electronic Filing PIN – Help](#) or call 1-866-704-7388

If your filing status for this current return is Married Filing Jointly, your spouse will have to provide identifying information also. Spaces for your spouse to enter (1) Prior year PIN, (2) Prior year AGI, or (3) Electronic Filing PIN is provided.

e-Signature – There are three parts to e-Signing your return:

- Create a five (5) digit PIN and place that PIN in the space provided
- Enter your Birth Date in the space provided, and
- Enter today’s date (the date you will submit your return) in the space provided

If you are filing Married Filing Jointly, your spouse must also provide an e-Signature by creating a five (5) digit PIN and his/her birth date and placing the information in the spaces provided.

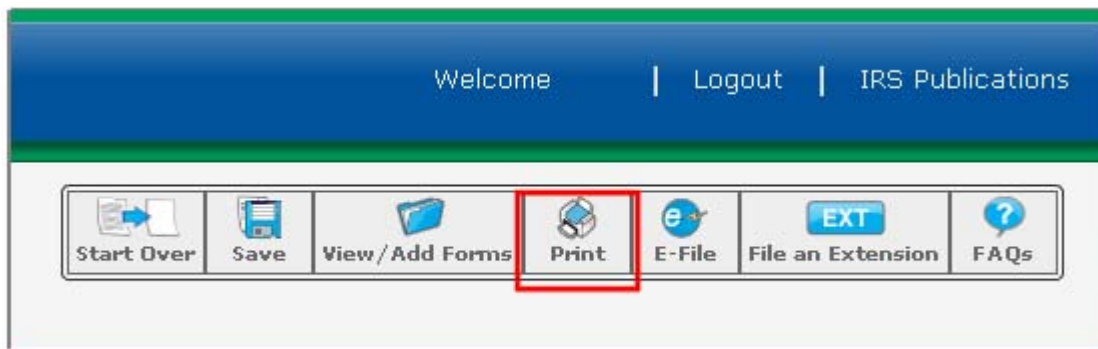
Disclosure Statement – Read the disclosure statement and check the box.

Verify All Forms and Schedules are Attached to Your Return

You must **complete** a form or schedule before it can link to the return you intend to e-file. If the form or schedule is incomplete, it will still appear in your list of form when you select the “View/Add Forms” icon; however, it will not be attached to your return when your return is transmitted.

Verify all attachments by selecting the “Print” icon at the top of Step 1 or Step 2. Once selected, a new window will open and display the tax return (including all the forms and schedules) that will be transmitted. You should print a copy of your return for your records and review it. Minimally, you should scroll the entire return to ensure that everything is attached.

Note: W-2’s and 1099’s will **not print** as part of the return.



Screenshot showing the Print icon

Once all required information in Step 2 has been input, the E-file Now button will become activated. When activated, selecting the E-file Now button will transmit your return and you will receive a notification that your return was successfully transmitted. Generally, the IRS will acknowledge acceptance or rejection of your return within 72 hours of a successful transmission.

If you do not receive an email from the provider regarding the IRS accepting or rejecting your return within 72 hours, check your SPAM box. If the email is not in your SPAM box, check all other email addresses you may have used before calling 1-800-829-1040 and making an inquiry.

Making an Electronic Payment

If you owe tax with your return, you can make your payment electronically by following the instructions at the bottom of Step 2. If you plan to make an electronic payment, make sure you complete the information at the bottom of Step 2 before selecting the E-file Now button and transmitting your return. If you transmitted before completing the electronic payment section, you will have to mail in your payment.

Other Information and Assistance

Additional Assistance

The type of issue you have will determine where to receive assistance.

Tax Law Question– If you have tax law questions, you can receive online [Help with Tax Questions](#) or call the IRS at 1800-829-1040. Hearing impaired taxpayers can call the IRS at 1800-829-4059.

Don't Remember your Prior AGI – Get your [Electronic Filing PIN](#) online or call 1-866-704-7388.

Fillable Forms Software Question– If the Fillable Forms software does not appear to work properly (e.g., calculation issues, input issues, error code issues), search the [Fillable Forms FAQs](#) for your answer. If your answer cannot be found in the [FAQs](#), email us at irs.gov.website.helpdesk@speedymail.com. Receiving an answer to your emailed question takes approximately five (5) business days.