

Virginia Department of Taxation



Virginia Free Fillable Forms User Guide Tax Year 2014

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Introduction

Welcome to the Virginia Individual Income Tax Free Fillable Forms program.

Fillable Forms is a free web-based program made available by the Virginia Department of Taxation (the Department) through the State Fillable Forms program for submitting your Virginia Individual Income tax return.

Fillable Forms provides individual taxpayers with a comparable experience to paper forms online with the computer. This free web-based program allows taxpayers to choose the state income tax forms and schedules they need, fill in information, e-File and sign the return electronically and also print for record keeping.

The purpose of this user guide is to explain the features of Fillable Forms, to provide instruct users on how to navigate the program and to allow them to prepare their return.

Virginia State Fillable Forms

Resources

- [About](#)
- [View Supported Forms](#)
- [Get E-File Status](#)
- [Return to VA Tax](#)

VA free-File

More About State Fillable Forms

These online forms are electronic versions of paper Virginia Department of Taxation tax forms. If you're used to doing your Virginia return using paper forms, State Fillable Forms will look familiar. Entering your information is just like filling in the paper forms.

Here's how State Fillable Forms works:

- It's free, all you'll need is this year's completed federal tax return.
- Create a password-protected login so you can sign in and out of your return.
- Do the math using the provided calculation mechanism.
- Either e-file your return using a 5-digit numeric signature pin, or print your return and mail it in.

Items to note:

- If you're looking for an interview-based program that will guide you in preparing your VA taxes, you can choose a product from one of the many Virginia [State Free File](#) software providers.
- This program supports all credits on Schedule CR and Schedule OSC. However, certain credits are not eligible for e-file, and the return will have to be printed and mailed to the Virginia Department of Taxation for processing.
- This program does not support prior-year returns, part-year, non-resident or amended returns.

[Start State Fillable Forms](#)

The screenshot shows the '2014 Virginia Resident Form 760 Individual Income Tax Return' interface. It includes a navigation bar with 'Help', 'Contact VA Tax', 'Update Account', and 'Sign Out'. Below the navigation bar are buttons for 'Save', 'Print Return', 'Add/View Forms', 'Start Over', and 'FAQs'. The main form area is divided into two steps: 'STEP 1. Fill Out Your Tax Forms' and 'STEP 2. E-File Your Tax Forms'. The form itself is titled '2014 Virginia Resident Form 760 Individual Income Tax Return' and includes fields for 'Your first name', 'Spouse's first name', 'Social Security Number', 'First 4 letters of last name', 'Birth Date', 'Dceased', 'City, town or post office and state', 'ZIP Code', 'Last 5 Digits of VA Driver's License ID', 'Locality Code', and 'Exemptions'. There are also checkboxes for 'Check all boxes that apply' and 'Filing Status'.

[Privacy Statement](#) | [Terms of Service](#) | Security Certification has been performed by C-Level Security

Qualifications to Use Free Fillable Forms

To use State Fillable Forms, there are **no limitations for income, age or location**. Anyone may use it to complete the 760 return and related schedule(s).

However, there are **some limitations if you plan to e-file your return**. You can use State Fillable Forms to complete the return/schedules, but then you will have to **print** it all, attach supporting documentation and **mail** the return to the Department.

You must complete lines of Schedule ADJ (SchADJ tab) of the State Fillable Forms as described below. After you print out your return and related schedules, attach an explanation explaining each addition, subtraction, deduction and/or contribution used.

- More than 2 additions – Enter Code 00 & the total additions on Line 2b
- More than 3 subtractions – Enter Code 00 & the total subtractions on Line 6b
- More than 3 deductions – Enter Code 000 & the total deductions on Line 8a
- More than 3 voluntary contributions – Enter Code 00 & the total contributions on Line 22a
- More than 3 public school or library contributions – Enter Code 999999 & total amount on Line 23a
- Any of the 10 credits requiring mailed documentation – See the [Schedule CR instructions](#) for details.
- If you are claiming credits for taxes paid to another state on the Schedule OSC – See the [Schedule OSC instructions](#) for details.

Forms & Schedules

The Fillable Forms program supports these 2014 Virginia resident return and related schedules.

- Form 760
- Schedule ADJ
- Schedule CR
- Schedule FED
- Schedule OSC
- Schedule VAC
- Schedule VACS
- Form 760C
- Form 760F
- Form 760-PMT
- Form 760-PFF

Getting Started

As you prepare to file your tax return using the Fillable Forms program, have the following items available:

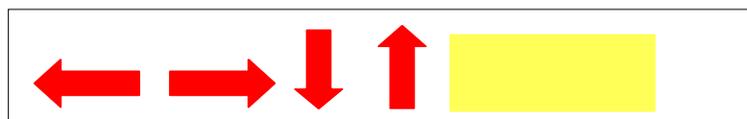
- A copy of your 2014 federal tax return
- All income and tax statements you received for 2013
NOTE: Examples include W-2, W-2G, 1099-G, 1099-MISC, and 1099-R.
- Any 2014 estimated tax payment amounts
- If using direct deposit for a refund, or if using direct debit withdrawal to pay taxes owed, have your routing number and account number for your checking or savings account ready.

Additional Help

FAQs – For questions regarding Fillable Forms, visit the Virginia [Fillable Forms e-File FAQs](#) page.

Phone – Contact Customer Services at (804) 367-8031, between 8:30 am – 5:00 pm, Monday – Friday.

These icons/images will appear throughout this user guide to help you and draw attention to important buttons or steps.



Access Free Fillable Forms

1. Visit the [e-File home page](#), which provides all options to e-File the individual income tax return.
2. Click the “Free Fillable Forms e-File” link (or the image) and it will take you to the Vendor Disclaimer page.

Electronic Filing Options

The e-File system is open and available.

Get your tax refund fast using e-File!

There are three options to choose from - Virginia Free File, paid e-File, and Free State Fillable Forms e-File.

For additional details, review the [e-File FAQs](#).

e-File with Free File	e-File with Fillable Forms	e-File for a Fee
 <p>Free File is a free federal and state income tax preparation and electronic filing program offered to customers based on income and other qualifiers.</p> <p>To ensure you can file both your federal and state returns for free, please access these Free File products from our website.</p>	 <p>Free Fillable Forms e-file is an online version of the Virginia 760 resident return and schedules. The Fillable version looks similar to the paper forms with the benefit of simple math calculations done for you.</p> <p>Most customers can e-file their return when it is complete. Certain conditions apply that require the completed return to be mailed instead.</p> <ul style="list-style-type: none">• Quick Reference - Avoid Rejects• Quick Reference - Resolve Errors• Fillable Forms User Guide• Fillable Forms FAQs	 <p>Paid e-file is for customers who are not eligible for Free File and prefer an electronic filing program that prepares the return through a series of questions that ask only for information relevant to the type of return filed.</p> <p>Many of these programs charge a small fee and can be purchased online or over the counter.</p>

3. Read the Fillable Forms Vendor Disclaimer.
 - **Schedule CR instructions** – important if you plan to claim any of the 10 credits that require supporting documentation to be mailed to the Department.
 - **Resources** – important to help use Fillable Forms and to avoid errors
4. Click the “Leave VATAX Site” for the Virginia State Fillable Forms home page.

Fillable Forms

Fillable Forms is hosted and owned by an approved Virginia Free File commercial vendor that partners with the Virginia Department of Taxation to provide this service. Free Fillable Forms has no limitations for income, age, or location to prepare your return. However, there are some limitations if you plan to e-file your return.

Limitations

Important - Fillable Forms supports Internet Explorer 8 to prepare and e-file your return; however, it does not support printing the return. If you plan to print your return, use Internet Explorer 9 (or higher) or another internet browser.

If you have any of the following conditions - you can still use the program to complete the return, but you will need to print and mail the return into the Tax Department instead of electronically filing.

- If you claim more than 3 additions, subtractions, deductions or contributions.
- If you claim any of the 10 credits that require supporting documentation to be mailed to the Tax Department. See the [Schedule CR instructions](#) for details.
- If you claim credits for taxes paid to another state on the Schedule OSC.

Resources

- [Quick Reference Guide - How to Avoid Rejects](#)
- [Quick Reference Guide - How to Resolve Errors](#)
- [Free Fillable Forms User Guide](#)
- [Free Fillable Forms FAQs](#)

Vendor Disclaimer

The Tax Department fully endorses this vendor and the service they are providing. We recommend you review the e-File vendor's Privacy Policy and Terms of Service when you get to their site to fully understand what information is collected by this private business and how it is used. As you leave the Tax Department's site, you will be taken to the vendor's site, which is intentionally designed to be unbranded.

[Leave VATAX Site](#) [Return to Previous Page](#)

Access Free Fillable Forms (continued)

5. Review the information under the “More About State Fillable Forms”.

Virginia State Fillable Forms

Resources

- [About](#)
- [View Supported Forms](#)
- [Get E-File Status](#)
- [Return to VA Tax](#)



More About State Fillable Forms

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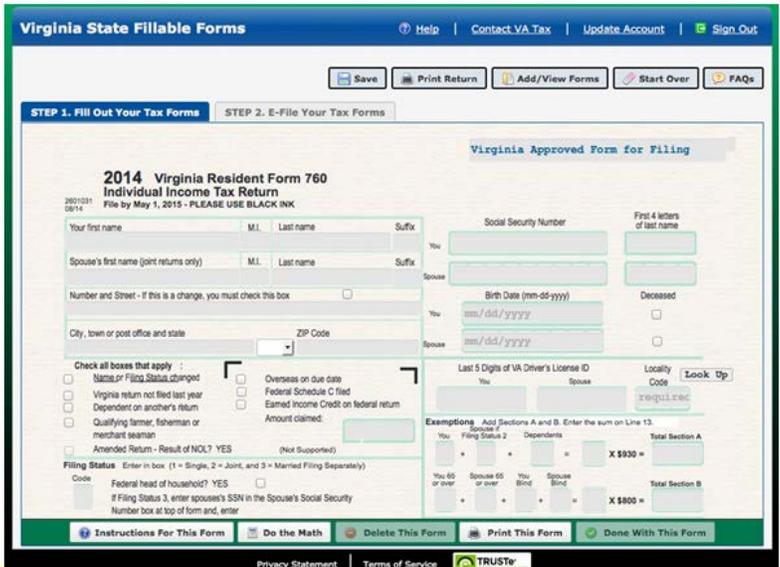
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[Start State Fillable Forms](#)

6. Review the Privacy Statement and Terms of Service information (bottom of the page).

[Start State Fillable Forms](#)



[Privacy Statement](#) | [Terms of Service](#)

  Security Certification has been performed by C-Level Security

Access Free Fillable Forms (continued)

- Click the “Start State Fillable Forms” button to access the Welcome State Fillable Forms page.

The screenshot shows the Virginia State Fillable Forms website. On the left, there is a blue sidebar with the heading "Resources" and links for "About", "View Supported Forms", "Get E-File Status", and "Return to VA Tax". The main content area features the "VA free-File" logo and a section titled "More About State Fillable Forms". This section explains that the online forms are electronic versions of paper forms and provides instructions on how they work. A list of items to note is provided, including that the service is free, requires a federal tax return, and supports various credits. At the bottom of the main content area, a yellow button labeled "Start State Fillable Forms" is highlighted with a red arrow. Below this, a screenshot of the "2014 Virginia Resident Form 760 Individual Income Tax Return" is shown, displaying various input fields for personal and financial information.

Virginia State Fillable Forms

Resources

- [About](#)
- [View Supported Forms](#)
- [Get E-File Status](#)
- [Return to VA Tax](#)

VA free-File

More About State Fillable Forms

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Start State Fillable Forms

Virginia State Fillable Forms | Help | Contact VA Tax | Update Account | Sign Out

Save | Print Return | Add/View Forms | Start Over | FAQs

STEP 1. Fill Out Your Tax Forms | STEP 2. E-File Your Tax Forms

Virginia Approved Form for Filing

2014 Virginia Resident Form 760
Individual Income Tax Return
File by May 1, 2015 - PLEASE USE BLACK INK

2010231 08/14

Your first name M.I. Last name Suffix Social Security Number First 4 letters of last name
Spouse's first name (joint returns only) M.I. Last name Suffix Spouse Birth Date (mm-dd-yyyy) Deceased
Number and Street - If this is a change, you must check this box City, town or post office and state ZIP Code
Check all boxes that apply: Married or Filing Status changed Overseas on due date Last 5 Digits of VA Driver's License ID Locality Code Virginia return not filed last year Federal Schedule C filed Exemptions Dependent on another's return Earned Income Credit on federal return Qualifying farmer, fisherman or merchant seaman Amended Return - Result of NOL? YES (Not Supported) Federal head of household? YES If Filing Status 3, enter spouse's SSN in the Spouse's Social Security Number box at top of form and, enter

Filing Status Enter in box (1 = Single, 2 = Joint, and 3 = Married Filing Separately) Code

Exemptions Add Sections A and B. Enter the sum on Line 13
You Filing Status 2 Dependents Total Section A
You 65 or over Spouse 65 or over You Blind Spouse Blind Total Section B

Instructions For This Form | Do the Math | Delete This Form | Print This Form | Done With This Form

Privacy Statement | Terms of Service | TRUSTe CERTIFIED PRIVACY | Security Certification has been performed by C-Level Security

- Continue to next section to create an account.

Create a Free Fillable Forms Account

You are considered a “New User” if you have not created an account for the current tax year.

1. Review the information on the State Fillable Forms Welcome page.
2. Click “Continue” button to access the sign in window (bottom or top of the window).

Welcome to Virginia State Fillable Forms

Continue →

Filing your tax return:

1. Go to your form 760.
2. Enter your information according to the form instructions.
 - Only enter the information necessary to complete your return.
 - Leave areas blank (don't enter zeros, etc.) unless instructed otherwise.
 - When uncertain of what to enter, review the form instructions.
 - Calculate your tax yourself and enter it on the form.
 - Enter credits if applicable.
3. E-File your tax return by completing the required information on the "E-File Your Tax Forms" tab.

Tips for Success:

- Complete your federal return first. You will need the Federal Adjusted Gross Income (AGI) from your federal return to begin your state return.
- Use and follow the form instructions for all entries. Select the **Instructions For This Form** button.
- Select the **Do the math** button often to run calculations and save your work.
- Use the computer operating systems and browsers suggested in the [FAQs](#).

Before You File:

- ✓ Make sure the Federal Adjusted Gross Income (AGI) agrees with your federal return.
- ✓ Enter your exemption.
- ✓ Enter your standard or itemized deductions.
- ✓ Prior to e-file, print a copy of the forms and double check that you have entered all required information.
- ✓ Print a final copy of your tax return for your records. Select the 'Print' button.
- ✓ Print your payment voucher if you owe taxes and are paying by check.

Continue →

3. Click “Create an Account” to access the Create an Account window and start the new user process.

SIGN IN

First Time Signing In This Year

If you're here for the first time this year, create a new account to get started.

Create Your Account

Returning To Your 2014 Return

User ID

Password

Remember my ID on this computer

Back **Sign In**

[Forgot User ID/Password?](#) | [Sign-In Help](#)

Create a Free Fillable Forms Account (continued)

4. Enter information in all of the blank fields.

CREATE YOUR ACCOUNT

Please fill in the following fields. All fields are required.

User ID

Remember my ID on this computer

Password **Re-enter Password**

Security Question **Security Answer**

Email Address **Confirm Email Address**

For security purposes, enter the code shown below:



[Try another code](#)

[Switch to audio verification](#)

I have read and agree to the terms of service. [Terms of Service](#)

5. Review the terms of services.
6. Check the “Terms of Service” checkbox.
7. Click “Continue” to access the Virginia State Fillable Forms window.
NOTE: A message confirming your account sign up will display.

Returning User

1. Provide your User ID and Password.
2. Click “Sign In” to access the Virginia State Fillable Forms window.

SIGN IN

First Time Signing In This Year

If you're here for the first time this year, create a new account to get started.

Returning To Your 2014 Return

User ID

Password

Remember my ID on this computer

[Forgot User ID/Password?](#) | [Sign-In Help](#)

Tabs & Links – Navigating Fillable Forms

The following screen is displayed after you sign in to your Fillable Forms account.

In the image below, each part of the Fillable Forms screen is identified with a letter (A, B, C, etc.) that corresponds to the descriptions provided.

- A. **“STEP 1” Tab** – Most of the return information is added here.
- B. **“STEP 2” Tab** – When all information in the “STEP 1” is complete, click “STEP 2” to continue filing.
- C. **Save** – Click the button often to save your work. Information is also automatically saved at set periods.
- D. **Print Return** – Click the button to open a dialog box to print a copy of the completed return for your records.
NOTE: When a Virginia tax return is e-Filed, no paper copy needs to be sent to the Department.
- E. **Add/View Forms** – Click the button to view the available forms/schedules. From here, you can select additional forms/schedules to add or view and delete any previously added forms/schedules.
- F. **Start Over** – Click the button to delete all forms and erase all data entered into Fillable Forms.
- G. **FAQs** – Click the link to view Virginia’s Fillable Forms Frequently Asked Questions (FAQs) page.
- H. **Help** – Click the link to view additional Fillable Forms FAQs that lists helpful information regarding Fillable Forms. It is a good idea to review these when you sign in to the Fillable Forms program.
- I. **Contact VA Tax** – The link goes to Virginia’s “Contact Us” page with ways to contact the Department.

Tabs & Links – Navigating Fillable Forms (continued)

Virginia State Fillable Forms
[H ? Help](#)
[I Contact VA Tax](#)
[J Update Account](#)
[K Sign Out](#)

A
B
C
D
E
F
G

[Save](#)
[Print Return](#)
[Add/View Forms](#)
[Start Over](#)
[FAQs](#)

STEP 1. Fill Out Your Tax Forms | **STEP 2. E-File Your Tax Forms**

Virginia Approved Form for Filing

2014 Virginia Resident Form 760
Individual Income Tax Return
 File by May 1, 2015 - PLEASE USE BLACK INK

2601031
08/14

Your first name M.I. Last name Suffix
 Spouse's first name (joint returns only) M.I. Last name Suffix

Number and Street - If this is a change, you must check this box

City, town or post office and state ZIP Code

Check all boxes that apply

Name or Filing Status changed
 Virginia return not filed last year
 Dependent on another's return
 Qualifying farmer, fisherman or merchant seaman
 Amended Return - Result of NOL? YES (Not Supported)

Filing Status Enter in box (1 = Single, 2 = Joint, and 3 = Married Filing Separately)
 Code Federal head of household? YES

If Filing Status 3, enter spouses's SSN in the Spouse's Social Security Number box at top of form and enter

Overseas on due date
 Federal Schedule C filed
 Earned Income Credit on federal return
 Amount claimed:

Social Security Number First 4 letters of last name
 You
 Spouse

Birth Date (mm-dd-yyyy) Deceased
 You mm/dd/yyyy
 Spouse mm/dd/yyyy

Last 5 Digits of VA Driver's License ID Locality Code [Look Up](#)
 You Spouse required

Exemptions Add Sections A and B. Enter the sum on Line 13.
 You Spouse if Filing Status 2 Dependents Total Section A
 + + = X \$930 =

You 65 or over Spouse 65 or over You Blind Spouse Blind Total Section B
 + + + = X \$800 =

[L Instructions For This Form](#)
[M Do the Math](#)
[N Delete This Form](#)
[O Print This Form](#)
[P Done With This Form](#)

- J. **Update Account** – Click the link to update your Fillable Forms account information.
- K. **Sign Out** – Click the button to log out. Ensure all data is saved before clicking the button.
- L. **Instructions For This Form** – Click the button to display 760 return and related schedule instructions.
- M. **Do The Math** – Simple math calculations are built into Fillable Forms. Many of these are not calculated automatically. Click the “Do the Math” button often throughout the process.
- N. **Remove This Form** – If you accidentally added a form/schedule, remove it by clicking the button. To activate the button, open the Form or Schedule page to be deleted.
- O. **Print This Form** – Click the button to print the form that is currently displayed in your screen.
- P. **Done With This Form** – If you add a form/schedule, click the button when you are done with the form/schedule to return to the main form.

Types of Input Areas

Blank Fields



When the blank field is selected for input, a white box with a blue border will appear.

- Input information in these fields by typing.
- Delete information in these fields by one of the following methods:
 - Use the Backspace key from the keyboard
 - Highlight the data and hit the Delete key from the keyboard
 - Highlight the data and type in the new information

Drop Down Fields



Read the form instructions for the form to determine if you are required to select an option from the drop down field (ex. code) and then enter an amount in the field next to it.

When the amount area is selected for input, a white box with a blue perimeter will appear.

- Do not put any information into these areas unless the form instructions lead you to do so. Incorrect input in these areas will cause a return rejection.
- Select information from the drop down and enter information into these fields exactly as provided in the form instructions.

Boxes



When selected for input, the box will have a bright blue line surrounding it. The input for these boxes is generally a “check mark.”

To put a check mark in the checkbox:

- Use your mouse, place your cursor on the box and “right click” or
- Tap the touchpad on your laptop.

To remove the check mark from the check box:

- Use your mouse and place your cursor on the box and “right click” or
- Tap the touchpad on your laptop.

Radio Button



When selected for input, the radio button will have a bright blue line surrounding it.

To fill in the circle:

- Use your mouse and place your cursor on the circle and “right click” or
- Tap the touchpad on your laptop.

NOTE: Selecting another radio button for the question will de-select the previous radio button.

To remove the input from the selected radio button – double-click the radio button.

Calculated Fields



These fields are populated automatically when the required information is in the form and “Do the Math” button is selected.

Calculated field data may always be changed by changing the data used to calculate the field and selecting the “Do the Math” button again.

Adding / Deleting Forms & Schedules

There are two ways to **add** forms and schedules to your Fillable Forms return.

Anytime an “added form” is open, the previously grayed out buttons (bottom of the page) are enabled.

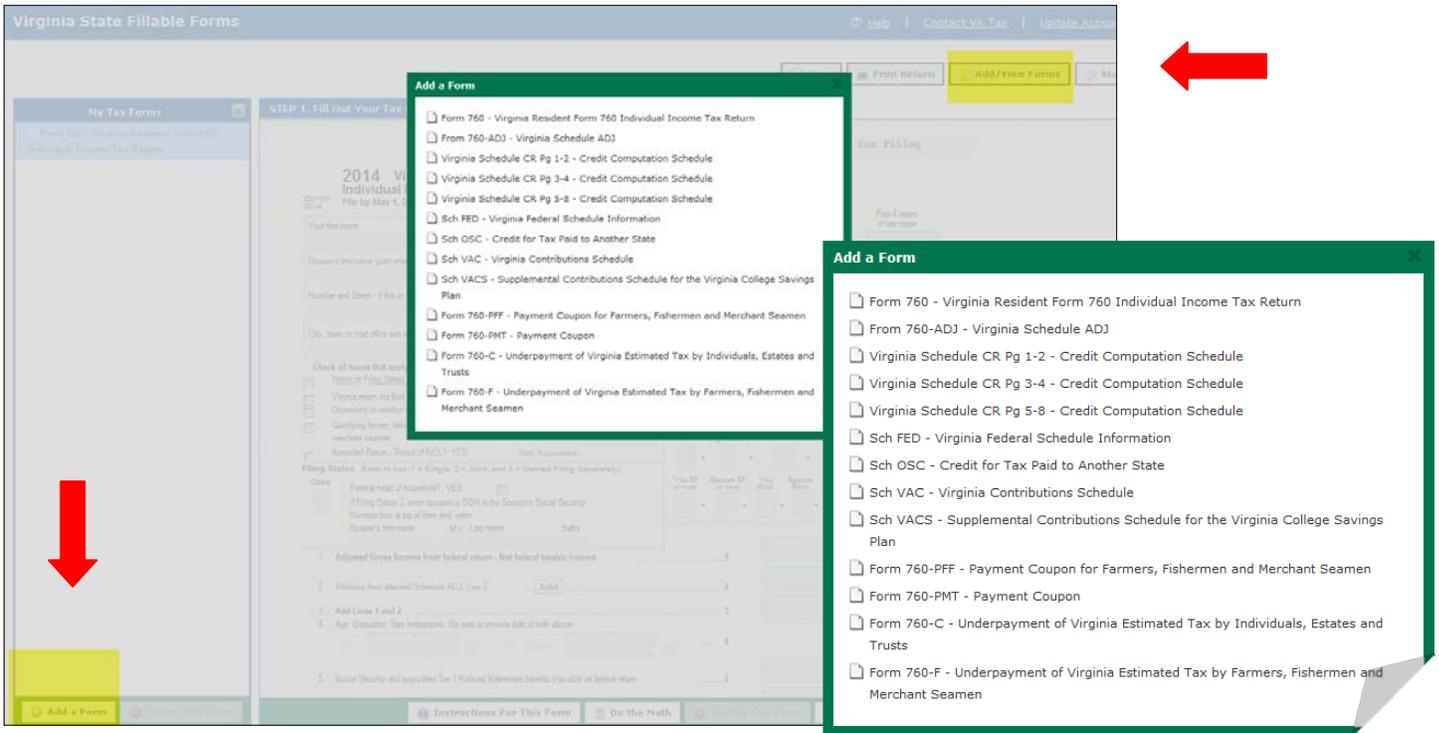
- “Done With This form” – saves data on the form, saves form to “List of Forms” and opens up Form 760.
- “Delete This Form” – deletes data on the form, removes it from “List of Forms” and opens up Form 760.

1. Select the “Add/View Forms” Icon (upper right side of page) to open the “My Tax Forms” box.

NOTE: This box lists your current forms.

- At the bottom of the “My Tax Forms” box, select “Add a Form” to bring up the forms menu.
- Click the form that needs to be added to the return.

NOTE: The form is added to your list of forms and will display in your “My Tax Forms” screen.



2. Use the “Add” button(s), which may appear near the Lines of the form.

STEP 1. Fill Out Your Tax Forms	STEP 2. E-File Your Tax Forms
17. Amount of Tax from Tax Table or Tax Rate Schedule (round to whole dollars)	17
18. Spouse Tax Adjustment (STA), Filing Status 2 only. Enter Spouse's VAGI in box here and STA amount on Line 18.	18
19. Net Amount of Tax - Subtract Line 18 from Line 17	19
20. Virginia income tax withheld for 2014.	
20a. Your Virginia withholding	20a
20b. Spouse's Virginia withholding (Filing Status 2 only)	20b
21. Estimated tax payments for taxable year 2014 (from Form 760ES)	21
22. Amount of 2013 overpayment applied toward 2014 estimated tax	22
23. Extension Payments (from Form 760IP)	23
24. Tax Credit for Low-Income Individuals or Earned Income Credit from Sch. ADJ, Line 17	24
25. Credit for Tax Paid to Another State from Schedule OSC, Line 31. You must enclose Schedule OSC and a copy of all other state returns.	25
26. Credit for Political Contributions	26
27. Credits from enclosed Schedule CR, Section 5, Line 1A	27

3. To add the same form multiple times, use either of the two methods described above.

NOTE: This applies only to when needing more than one page of Schedule OSC to prepare the return.

Adding / Deleting Forms & Schedules (continued)

There are two ways to **delete** forms and schedules to your Fillable Forms return.

1. If the form or schedule needs to be deleted and is displayed on your screen, select “Delete This Form”.

2014 Virginia Schedule OSC
CREDIT FOR TAX PAID TO ANOTHER STATE

Your Social Security Number [REDACTED]

Name(s) as shown on Virginia return [REDACTED] You must attach a copy of the return from each state for which you are claiming credit.

Credit Computation - 1 Check this box if claiming border state

	DOLLAR	AMOUNT
1. Enter the number listed below to identify the filing status claimed on the other state's tax return . . . 1 1. Single 2. Married Filing Jointly 3. Married Filing Separately 4. Unfiled 5. Other		
2. Enter the number listed below to identify the person claiming the credit 2 1. You 2. Spouse 3. You and Spouse		
3. Qualifying taxable income on which the other state's tax is based 3		00
4. Virginia Taxable Income. See instructions 4		00
5. Qualifying tax liability owed to the other state. See instructions 5		00
6. Identify the state and ATTACH a copy of the other state's return 6		
7. Virginia Income Tax. See instructions 7		00
8. Income percentage. If filing Form 760 or Form 760PY, divide line 3 by line 4. If filing Form 763, divide line 4 by line 3. Compute to one decimal place, not to exceed 100%. For example, 0.3163 becomes 31.6%. If claiming border, see instructions 8		%
9. If filing Form 760 or Form 760PY, multiply line 7 by line 8. If filing Form 763, multiply line 5 by line 8 9		00
10. Credit. If filing Form 760 or Form 760PY, enter the lesser of line 9 or line 5. If filing Form 763, enter the lesser of line 7 or line 9. Proceed to line 11 to compute another credit, otherwise go to line 21 10		00

Credit Computation - 2

11. Enter the number listed below to identify the filing status claimed on the other state's tax return . . . 11 1. Single 2. Married Filing Jointly 3. Married Filing Separately 4. Unfiled 5. Other		
12. Enter the number listed below to identify the person claiming the credit 12 1. You 2. Spouse 3. You and Spouse		

Instructions For This Form Do the Math **Delete This Form** Print This Form Done With This Form

2. If the form is not presently displayed on your screen,
 - A. Select the Add/View Forms tab (top right) to display the “My Tax Forms” window.
 - B. Select “Delete This Form” (bottom of “My Tax Forms” window) to display the “Delete This Form” menu.
 - C. Click the form on the “Delete This Form” menu.
 - D. Select “Yes” in the “Confirm Delete” window.

My Tax Forms

- Form 760 - Virginia Resident Form 260 Individual Income Tax Return
- Sch OSC - Credit for Tax Paid to Another State - Copy 1**

Confirm Delete

Are you sure you want to delete form:
Sch OSC - Credit for Tax Paid to Another State - Copy 1

Yes No

Add a Form **Delete This Form** Instructions For This Form Do the Math Delete This Form Print This Form Done With This Form

Preparing Your Form 760 – “STEP 1” Tab

Virginia Resident Form 760 first displays the “STEP 1. Fill out Your Tax Forms” (described in the Tabs & Links section of the user guide), which is the default active tab. It is active anytime you fill out a form or schedule.

- The “STEP 1” Tab is blue, which indicates that it is the active tab.
NOTE: The “STEP 2. E-File Your Tax Forms” tab is grayed out, indicating that it is an inactive tab.
- Use the scroll bar to see the whole form displayed on the screen. This applies to each page of Form 760, Virginia Schedule ADJ, Virginia Schedule OSC, etc.

The screenshot shows the Virginia State Fillable Forms interface. At the top, there is a blue header with the text "Virginia State Fillable Forms" and navigation links: "Help", "Contact VA Tax", "Update Account", and "Sign Out". Below the header, there are buttons for "Save", "Print Return", "Add/View Forms", "Start Over", and "FAQs". The main content area has two tabs: "STEP 1. Fill Out Your Tax Forms" (which is active and highlighted in blue) and "STEP 2. E-File Your Tax Forms" (which is grayed out). The form itself is titled "2014 Virginia Resident Form 760 Individual Income Tax Return" and includes the text "File by May 1, 2015 - PLEASE USE BLACK INK". The form is divided into sections for "You" and "Spouse", with fields for name, address, social security number, birth date, and other tax-related information. A red arrow points to the "STEP 1" tab, and another red arrow points to the scroll bar on the right side of the form.

Required Information in the “STEP 1” Tab

Data is required in the following fields and must be filled out in the “STEP 1” Tab:

- Taxpayer’s Name
- Spouse’s Name (for filing status “Married Filing Jointly” and “Married Filing Separately”)
- Address Line 1, City, State, Zip Code
- Locality Code
- Filing Status
- Taxpayer’s Date of Birth
- Spouse’s Date of Birth (for filing status Married Filing Jointly)
- Federal Adjusted Gross Income – Line 1
- Refund Checkbox (for Refund returns)

Important Information to Know

Do not provide zeroes in amount fields if no other additions, subtractions, deductions, credits, codes, etc. are being claimed.

1. If other additions are being claimed on Schedule ADJ, select from the drop down list “Other Addition Codes” on Lines 2b and 2c.
2. If other subtractions are being claimed on Schedule ADJ, select from the drop down list “Other Subtraction Codes” on Lines 6b, 6c and 6d.
3. If deductions are being claimed on Schedule ADJ, select from the drop down list “Deduction Codes” on Lines 8a, 8b and 8c.
4. Information is required on Schedule ADJ, Part 2, Credit for Low Income section if low income credit is being claimed.
5. If voluntary contributions are being claimed on Schedule ADJ, select from the drop down list “Voluntary Contribution Codes” on Lines 22a, 22b and 22c.
6. If school of library contributions are being claimed on Schedule ADJ, enter “School and Library Contribution Codes” on Lines 23a, 23b and 23c.

Preparing Your Form 760 – “STEP 1” Tab (continued)

This section provides steps to prepare the “STEP 1” portion of your Form 760 (with related schedules). Missing information causes returns to be rejected, so it is important to complete all information as indicated.

1. Enter your first name and last name.
2. If the Filing Status is “Married Filing Jointly” or “Married Filing Separately”, provide Spouse’s first name and last name.
3. Enter the address in Address Line 1 and Address Line 2 (as applicable).
4. Check the Address Change checkbox (as applicable).
5. Enter the City Name.
6. Select State field to select State drop down menu.
7. Select any of the applicable checkboxes in the “Check all boxes that apply” section.
NOTE: Only the first three check box options are available in the Fillable Forms program.

The screenshot shows the 'STEP 1. Fill Out Your Tax Forms' tab of the Virginia Free Fillable Forms program. The form is for the 2014 Virginia Resident Form 760 Individual Income Tax Return, with a filing deadline of May 1, 2015. The form includes fields for the filer's and spouse's names, Social Security Numbers, birth dates, and addresses. A 'Check all boxes that apply' section is visible, with the first three options highlighted in yellow. A red arrow points to the 'Locality Code' field, which is also highlighted in yellow and labeled 'required'. The 'Look Up' button is also visible next to the 'Locality Code' field.

8. Enter your Social Security Number.
9. If the Filing Status is “Married Filing Jointly” or “Married Filing Separately”, provide Spouse’s Social Security Number.
10. Provide the Locality Code from the Locality Codes button.
 - A. Click the button to open the document that lists the locality codes.
 - B. Locate your locality on the list.
 - C. Enter the **3-digit** number in the Locality Code field.
NOTE: When a “0” is part of a Locality Code, it must also be included.

The fields below are automated fields and will automatically calculate when “Do the Math” is clicked.

This screenshot shows a portion of the 2014 Virginia Resident Form 760 Individual Income Tax Return form. The 'Locality Code' field is highlighted in yellow, and the 'Look Up' button is also visible. The form includes fields for the filer's and spouse's names, Social Security Numbers, and birth dates.

Preparing Your Form 760 – “STEP 1” Tab (continued)

11. Select the applicable Filing Status.
12. Enter the applicable exemptions in Exemptions – Section A and Section B.
NOTE: Red circled fields are automated and fill automatically after the “Do the Math” button is clicked.
13. Click “Do the Math” button to calculate Exemption Total and Exemption Amount fields.
14. Enter your birth date.
15. If Filing Status is “Married Filing Jointly”, enter Spouse’s birth date.

STEP 1. Fill Out Your Tax Forms | STEP 2. E-File Your Tax Forms

2014 Virginia Resident Form 760
Individual Income Tax Return
File by May 1, 2015 - PLEASE USE BLACK INK

Your first name: [] M.I.: [] Last name: [] Suffix: []
 Spouse's first name (joint returns only): [] M.I.: [] Last name: [] Suffix: []
 Number and Street - If this is a change, you must check this box:
 City, town or post office and state: [] ZIP Code: []

Check all boxes that apply:
 Name or Filing Status changed
 Virginia return not filed last year
 Dependent on another's return
 Qualifying farmer, fisherman or merchant seaman
 Amended Return - Result of NOL? YES (Not Supported)

Filing Status Enter in box (1 = Single, 2 = Joint, and 3 = Married Filing Separately)
 Code: [] Federal head of household? YES

If Filing Status 3, enter spouses's SSN in the Spouse's Social Security Number box at top of form and, enter Spouse's first name M.I. Last name Suffix

Social Security Number: You [] Spouse []
 Birth Date (mm-dd-yyyy): You [] Spouse []
 Deceased: You Spouse

Last 5 Digits of VA Driver's License ID: You [] Spouse []
 Locality Code: [] **Look Up**

Exemptions Add Sections A and B. Enter the sum on Line 13.
 You Filing Status 2 Dependents
 + + = X \$930 = Total Section A
 You 65 or over Spouse 65 or over You Blind Spouse Blind
 + + + = X \$800 = Total Section B

Instructions For This Form | **Do the Math** | **Delete This Form** | **Print This Form** | **Done With This Form**

16. Continue working through the Virginia Resident return (Form 760) starting with Line 1.
17. If you need 760 line instructions, click the “Instructions For This Form” button (bottom of the page).
18. Click “Do the Math” button to ensure calculated fields are properly updated.
NOTE: This is important to do often while preparing your tax return.

STEP 1. Fill Out Your Tax Forms | STEP 2. E-File Your Tax Forms

Spouse's first name M.I. Last name Suffix

1. Adjusted Gross Income from federal return - Not federal taxable income 1 [] 00

2. Additions from attached Schedule ADJ, Line 3. **Add** 2 [] 00

3. Add Lines 1 and 2 3 [] 00

4. Age Deduction. See Instructions. Be sure to provide date of birth above.
 You [] 00 + Spouse [] 00 = 4 [] 00

5. Social Security and equivalent Tier 1 Railroad Retirement benefits if taxable on federal return 5 [] 00

6. State Income Tax refund or overpayment credit (reported as income on federal return) 6 [] 00

7. Subtractions from attached Schedule ADJ, Line 7 **Add** 7 [] 00

8. Add Lines 4, 5, 6 and 7 8 [] 00

9. Virginia Adjusted Gross Income (VAGI) - Subtract Line 8 from Line 3 9 [] 00

Instructions For This Form | **Do the Math** | **Delete This Form** | **Print This Form** | **Done With This Form**

Preparing Your Form 760 – “STEP 1” Tab (continued)

19. If you have an amount to report (other than \$0) for Line 2 (Total Additions),

A. Click the “Add” button next to Line 2.

NOTE: A window opens for the Virginia Schedule ADJ. The window for a specific form will open when the related “Add” button is clicked.

B. Scroll down and complete the Virginia Schedule ADJ section labeled “Additions to Federal Adjusted Gross Income”.

C. If the amount is \$0, do not put \$0 in Line 2 of Form 760 or in the related Schedule ADJ section.

D. Click the “Done With This Form” button to display the Form 760 screen.

The screenshot shows the '2014 Virginia Schedule ADJ (Form 760-ADJ)' interface. At the top, there are tabs for 'STEP 1. Fill Out Your Tax Forms' and 'STEP 2. E-File Your Tax Forms'. The main heading is '2014 Virginia Schedule ADJ (Form 760-ADJ)'. Below this, there is a field for 'Your Social Security Number' and a field for 'Name(s) as shown on Virginia return'. A 'Dollar Amount' label is positioned above the input fields. The section is titled 'Additions to Federal Adjusted Gross Income'. It contains several rows of input fields with corresponding line numbers and descriptions:

- Line 1: Interest on obligations of other states, exempt from federal income tax but not from state tax. Amount: 00.
- Line 2: Other additions to federal adjusted gross income. Amount: 00.
- Line 2a: FIXED DATE CONFORMITY ADDITION - SEE INSTRUCTIONS. Amount: 00.
- Line 2b: Code dropdown menu. Amount: 00.
- Line 2c: Code dropdown menu. Amount: 00.
- Line 3: Total Additions. Add Lines 1 and 2a - 2c. Enter here and on Form 760, Line 2. Amount: 00.

At the bottom of the form, there is a navigation bar with buttons: 'Instructions For This Form', 'Do the Math', 'Delete This Form', 'Print This Form', and 'Done With This Form'. A yellow vertical bar is visible on the right side of the form.

20. Continue working through the Virginia Resident return (Form 760).

21. If you have an amount to report (other than \$0) for Line 7 (Subtractions),

A. Click the “Add” button next to Line 7.

B. Scroll down and complete the Virginia Schedule ADJ section labeled “Subtractions from Federal Adjusted Gross Income”.

C. If the amount is \$0, do not put \$0 in Line 7 of Form 760 or in the related Schedule ADJ section.

D. Click the “Done With This Form” button to display the Form 760 screen.

The screenshot shows the 'Subtractions from Federal Adjusted Gross Income' section of the '2014 Virginia Schedule ADJ (Form 760-ADJ)' interface. At the top, there are tabs for 'STEP 1. Fill Out Your Tax Forms' and 'STEP 2. E-File Your Tax Forms'. The main heading is 'Subtractions from Federal Adjusted Gross Income'. It contains several rows of input fields with corresponding line numbers and descriptions:

- Line 4: Income (interest, dividends or gains) from obligations or securities of the U.S. exempt from state income tax, but not from federal tax. Amount: 00.
- Line 5: Disability income reported as wages (or payments in lieu of wages) on your federal return. Amount: 00.
- Line 5a: Enter YOUR disability subtraction. Amount: 00.
- Line 5b: Enter SPOUSE's disability subtraction. Amount: 00.
- Line 6: Other subtractions as provided in instructions. Amount: 00.
- Line 6a: FIXED DATE CONFORMITY SUBTRACTION - SEE INSTRUCTIONS. Amount: 00.
- Line 6b: Code dropdown menu. Amount: 00.
- Line 6c: Code dropdown menu. Amount: 00.
- Line 6d: Code dropdown menu. Amount: 00.
- Line 7: Total Subtractions. Add Lines 4, 5a, 5b and 6a - 6d. Enter here and on Form 760, Line 7. Amount: 00.

At the bottom of the form, there is a navigation bar with buttons: 'Instructions For This Form', 'Do the Math', 'Delete This Form', 'Print This Form', and 'Done With This Form'. A yellow vertical bar is visible on the right side of the form.

22. Continue working through the Virginia Resident return (Form 760).

Preparing Your Form 760 – “STEP 1” Tab (continued)

23. Enter the total Exemptions amount for Line 13.

NOTE: The total amount from Exemptions Section A and Exemptions Section B equal the full exemptions amount

24. If you have an amount to report (other than \$0) for Line 14 (Deductions from VAGI),

- Click the “Add” button next to Line 14.
- Scroll down and complete the Virginia Schedule ADJ section labeled “Deductions from Virginia Adjusted Gross Income”.
- If the amount is \$0, do not put \$0 in Line 14 of Form 760 or in the related Schedule ADJ section.
- Click the “Done With This Form” button to display the Form 760 screen.

25. Continue working through the Virginia Resident return (Form 760).

26. Click the “Do the Math” button to ensure Line 16, Virginia Taxable Income is updated.

27. Enter your tax amount on Line 17.

NOTE: Tax tables found in the instructions are used to determine the tax amount.

- Click on the “Instructions For This Form” button.
- View the tax table that starts on Page 36 of the instructions.
- Locate your tax amount and enter the amount on Line 17.

28. Continue working through the Virginia Resident return (Form 760).

Preparing Your Form 760 – “STEP 1” Tab (continued)

29. If you have Virginia Withholding amounts to claim.

NOTE: You enter detailed withholding information (W-2, 1099, etc.) later on the “STEP 2” Tab.

- A. Enter your Virginia Withholding amount on Line 20a.
- B. Enter your Spouse's Virginia Withholding amount on Line 20b (for Married Filing Jointly).
- C. Click the “Do the Math” button.

30. Continue working through the Virginia Resident return (Form 760).

31. If you qualify for credits to report on Line 24 (Low-Income Individuals or Earned Income Credit),

- A. Click the “Add” button next to Line 24.
- B. Scroll down and complete the Virginia Schedule ADJ section labeled “Credit for Low-Income Individuals or Virginia Earned Income Credit”.
- C. If the amount is \$0, do not put \$0 in Line 24 of Form 760 or in the related Schedule ADJ section.
- D. Click the “Done With This Form” button to display the Form 760 screen.

Preparing Your Form 760 – “STEP 1” Tab (continued)

24. Tax Credit for Low-Income Individuals or Earned Income Credit from Sch. ADJ, Line 17	Add	24		00
25. Credit for Tax Paid to Another State from Schedule OSC, Line 31. You must enclose Schedule OSC and a copy of all other state returns.	Add	25		00
26. Credit for Political Contributions		26		00
27. Credits from enclosed Schedule CR, Section 5, Line 1A	Add	27		00

32. If you qualify for credits to report on Line 25 (Tax Paid to Another State),

NOTE: This means at the end, you will print and mail your return instead of electronically filing it. See the [Schedule OSC instructions](#) for details.

- Click the “Add” button next to Line 25.
- Scroll down and complete the Virginia Schedule OSC.
- If the amount is \$0, do not put \$0 in Line 25 of Form 760 or in the Schedule OSC section(s).
- Click the “Done With This Form” button to display the Form 760 screen.

2014 Virginia Schedule OSC
CREDIT FOR TAX PAID TO ANOTHER STATE

Name(s) as shown on Virginia return

You must attach a copy of the return from each state for which you are claiming credit.

Credit Computation - 1

Check this box if claiming border state

	DOLLAR	AMOUNT
1. Enter the number listed below to identify the filing status claimed on the other state's tax return ... 1		
1. Single 2. Married Filing Jointly 3. Married Filing Separately 4. Unfiled 5. Other		
2. Enter the number listed below to identify the person claiming the credit ... 2		
1. You 2. Spouse 3. You and Spouse		
3. Qualifying taxable income on which the other state's tax is based ... 3		00
4. Virginia Taxable Income. See instructions ... 4		00
5. Qualifying tax liability owed to the other state. See instructions ... 5		00
6. Identify the state and ATTACH a copy of the other state's return ... 6		
7. Virginia Income Tax. See instructions ... 7		00
8. Income percentage. If filing Form 760 or Form 760PY, divide line 3 by line 4. If filing Form 763, divide line 4 by line 3. Compute to one decimal place, not to exceed 100%. See		

Instructions For This Form Do the Math Delete This Form Print This Form Done With This Form

33. Continue working through the Virginia Resident return (Form 760).

34. If you qualify for credits to report on Line 27 (Other Credits),

NOTE: When credits are claimed that require supporting documentation, this means you will print and mail your return instead of electronically filing it. See the [Schedule CR instructions](#) for details.

- Click the “Add” button next to Line 27.
- Scroll down and complete the related Virginia Schedule CR section(s).
- If the amount is \$0, do not put \$0 in Line 27 of Form 760 or in related Schedule CR section(s).
- Click the “Done With This Form” button to display the Form 760 screen.

35. Click the “Do the Math” button to ensure information entered so far is updated.

36. Continue working through the Virginia Resident return (Form 760).

28. Add Lines 20a through 27	28		00
29. If Line 28 is less than Line 19, subtract Line 28 from Line 19. This is the Tax You Owe	29		00
30. If Line 19 is less than Line 28, subtract Line 19 from Line 28. This is Your Tax Overpayment	30		00

Form 760

Preparing Your Form 760 – “STEP 1” Tab (continued)

31. Amount of overpayment you want credited to next year's estimated tax 31 00

32. Virginia College Savings Plan Contributions from Schedule VAC, Section I, Line 6 32 00

33. Other Voluntary Contributions from Schedule VAC, Section II, Line 14 33 00

34. Addition to Tax, Penalty and Interest from attached Schedule ADJ, Line 21. 34 00

Form 760

37. If you have an amount to report (other than \$0) on Line 32 (Virginia College Savings Plan Contributions),
- Click the “Add” button next to Line 32.
 - Scroll down and complete the Virginia Contributions Schedule VAC Section I labeled “Virginia College Savings Plan (Virginia529) Contributions”.
 - If the amount is \$0, do not put \$0 in Line 32 of Form 760 or in the related Schedule VAC (VA529) section.
 - Click the “Done With This Form” button to display the Form 760 screen.

STEP 1. Fill Out Your Tax Forms | STEP 2. E-File Your Tax Forms

A Overpayment Balance Available
Enter the overpayment amount computed on your return less the amount credited to estimated tax for next year. The total contribution amount in Section B below may not exceed this amount.

B Savings Program Information Contribution Amount

1. Program Type Beneficiary's Last Name 00

Account Number (For College America, contact your financial advisor) Routing Number (Required for CollegeAmerica Only)

2. Program Type Beneficiary's Last Name 00

Schedule VAC, VA529 details (Refund only usage)

38. Click the “Do the Math” button to ensure information entered so far is updated.

32. Virginia College Savings Plan Contributions from Schedule VAC, Section I, Line 6 32 00

33. Other Voluntary Contributions from Schedule VAC, Section II, Line 14 33 00

34. Addition to Tax, Penalty and Interest from attached Schedule ADJ, Line 21. 34 00

Form 760

39. If you have an amount to report (other than \$0) on Line 33 (Other Voluntary Contributions),
- Click the “Add” button next to Line 33.
 - Scroll down and complete the Virginia Contributions Schedule VAC Section II labeled “Other Voluntary Contributions”.
 - If the amount is \$0, do not put \$0 in Line 33 of Form 760 or in the related Schedule VAC (Other) section.
 - Click the “Done With This Form” button to display the Form 760 screen.

STEP 1. Fill Out Your Tax Forms | STEP 2. E-File Your Tax Forms

II - Other Voluntary Contributions
Complete this section to contribute to one or more of the voluntary contribution organizations listed in the income tax instructions.

A Overpayment balance available. Enter the overpayment amount computed on your return less the amount credited to estimated tax for next year and the amount of Virginia College Savings Plan contributions from Section I. The total of Lines 2 through 7 below may not exceed this amount.

1. 00

B Voluntary Contributions to be made from your refund
See instructions for a list of qualifying organizations and codes. [Look Up](#)

Code Contribution Amount

2. 00

3. 00

Instructions For This Form | Do the Math | Delete This Form | Print This Form | Done With This Form

Preparing Your Form 760 – “STEP 1” Tab (continued)

32. Virginia College Savings Plan Contributions from Schedule VAC, Section I, Line 6	Add	32		00	Form 760
33. Other Voluntary Contributions from Schedule VAC, Section II, Line 14	Add	33		00	
34. Addition to Tax, Penalty and Interest from attached Schedule ADJ, Line 21.	Add	34		00	

40. If you have an amount to report (other than \$0) on Line 34 (Addition to Tax, Penalty and Interest),
- Click the “Add” button next to Line 34.
 - Scroll down and complete the Virginia Schedule ADJ section labeled “Credit for Low-Income Individuals or Virginia Earned Income Credit”.
 - If the amount is \$0, do not put \$0 in Line 34 of Form 760 or in the related Schedule ADJ section.
 - Click the “Done With This Form” button to display the Form 760 screen.

Addition to Tax, Penalty and Interest				Schedule ADJ	
18. Addition to tax. Fill in oval if addition came from:	<input type="radio"/> Form 760C	<input type="radio"/> Form 760F	18		00
	Add	Add			
19. Penalty:	<input type="radio"/> Late Filing Penalty	<input type="radio"/> Extension Penalty	19		00
20. Interest (accrued on the tax you owe)		20			00
21. Total Addition to Tax, Penalty and Interest (add Lines 18 through 20). Enter here and on Line 34 of Form 760.		21			00

41. Continue working through the Virginia Resident return (Form 760).

STEP 1. Fill Out Your Tax Forms	STEP 2. E-File Your Tax Forms		
35. Consumer's Use Tax. You may be liable if sales tax was not paid on Internet or other purchases. See instructions.	35		00
36. Add Lines 31 through 35	36		00
37. If you owe tax on Line 29, add Lines 29 and 36. OR If Line 30 is less than Line 36, subtract Line 30 from Line 36. AMOUNT YOU OWE CHECK THIS BOX IF PAYING BY CREDIT OR DEBIT CARD - SEE INSTRUCTIONS	37	<input type="checkbox"/>	00
38. If Line 30 is greater than Line 36, subtract Line 36 from Line 30. YOUR REFUND If the Direct Deposit section below is not completed, your refund will be issued on a Debit Card.	38		00
DIRECT BANK DEPOSIT Domestic Accounts Only. No International Deposits.			
Bank Routing Transit Number		Bank Account Number	
<input type="text"/>		<input type="text"/>	
		<input checked="" type="radio"/> Checking <input type="radio"/> Savings	
<input type="checkbox"/> I (We) authorize the Dept. of Taxation to discuss this return with my (our) preparer. (Not Supported)			
<input type="checkbox"/> I agree to obtain my Form 1099-G at www.tax.virginia.gov .			
I (We), the undersigned, declare under penalty of law that I (we) have examined this return and to the best of my (our) knowledge, it is a true, correct and complete return.			
Your Signature	Date	Spouse's Signature	Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Your Phone	Spouse's Phone	Office Use	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Preparer's Name	Firm Name	Phone Number	Filing Election
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
SELF-PREPARED		Preparer's PTIN	
<input type="text"/>		<input type="text"/>	

42. Click the “Do the Math” button to ensure information entered so far is updated.

Preparing Your Form 760 – “STEP 1” Tab (continued)

STEP 1. Fill Out Your Tax Forms | **STEP 2. E-File Your Tax Forms**

35. Consumer's Use Tax. You may be liable if sales tax was not paid on Internet or other purchases. See instructions. 35 [] 00

36. Add Lines 31 through 35 36 [] 00

37. If you owe tax on Line 29, add Lines 29 and 36. OR
If Line 30 is less than Line 36, subtract Line 30 from Line 36. **AMOUNT YOU OWE** 37 [] 00

CHECK THIS BOX IF PAYING BY CREDIT OR DEBIT CARD - SEE INSTRUCTIONS

43. If you have a tax due amount on Line 37,

- A. If you plan to pay or have already paid by credit card, check the Credit Card Checkbox.
- B. If you want the Department to electronically withdraw the funds from your bank account, you will enter your detailed banking information for the payment later in “STEP 2”.

STEP 1. Fill Out Your Tax Forms | **STEP 2. E-File Your Tax Forms**

35. Consumer's Use Tax. You may be liable if sales tax was not paid on Internet or other purchases. See instructions. 35 [] 00

36. Add Lines 31 through 35 36 [] 00

37. If you owe tax on Line 29, add Lines 29 and 36. OR
If Line 30 is less than Line 36, subtract Line 30 from Line 36. **AMOUNT YOU OWE** 37 [] 00

CHECK THIS BOX IF PAYING BY CREDIT OR DEBIT CARD - SEE INSTRUCTIONS

38. If Line 30 is greater than Line 36, subtract Line 36 from Line 30. **YOUR REFUND** 38 [] 00

If the Direct Deposit section below is not completed, your refund will be issued on a Debit Card.

DIRECT BANK DEPOSIT Bank Routing Transit Number Bank Account Number **Checking** **Savings**

Domestic Accounts Only. No International Deposits.

44. If you have a refund amount on Line 38,

- A. For a Direct Bank deposit,
 1. Select the Checking or Savings radio button.
NOTE: When the applicable radio button is not selected, this causes the return to reject.
 2. Enter the Bank Routing Transit Number.
 3. Enter the Bank Account Number.
- B. For a Debit Card, leave the Direct Deposit section blank.
NOTE: A blank or incomplete Direct Deposit section will cause your refund to be issued on a Debit Card.

45. If you wish to obtain your 1099-G electronically from the Department’s website, check the “1099-G” checkbox

No International Deposits.

I (We) authorize the Dept. of Taxation to discuss this return with my (our) preparer. (Not Supported)

I agree to obtain my Form 1099-G at www.tax.virginia.gov.

I (We), the undersigned, declare under penalty of law that I (we) have examined this return and to the best of my (our) knowledge, it is a true, correct and complete return.

Your Signature _____ Date _____ Spouse's Signature _____ Date _____

Your Phone _____ Spouse's Phone _____ Office Use _____

Preparer's Name _____ Firm Name _____ Phone Number _____ Filing Election _____ Preparer's PTIN _____

SELF-PREPARED

[Instructions For This Form](#) [Do the Math](#) [Delete This Form](#) [Print This Form](#) [Done With This Form](#)

46. Provide the applicable phone number(s).

47. Review all information entered on the “STEP 1” Tab, before you continue to next section to finish your return preparation on the “STEP 2” Tab.

Preparing & e-Filing Your Form 760 – “STEP 2” Tab

Selecting the “STEP 2” Tab makes the tab active (changing from gray to blue) and opens a page for you to enter all remaining information required to e-File your return.

You will not be able to e-File your return until all of the required information is complete.

The “STEP 2” tab contains 4 sections.

- Section 1: Federal Information Needed for Virginia Return
 - Part A: Federal Withholding (adding Virginia Withholding details for income documents)
 - Part B: Schedule FED
- Section 2 – E-Signature Required
 - Taxpayer PIN
 - Spouse PIN (for filing status Married Filing Jointly)
- Section 3 – Additional Information Needed to E-file Your Virginia Return
 - Part A: Enter Email Address
 - Part B: International ACH Transactions Question
- Section 4 – Refund / Payment Options
 - Part A: Refund
 - Part B: Paying Tax Due by Check
 - Part C: Electronic Funds Withdrawal of Tax Due

Virginia State Fillable Forms

Help | Contact VA Tax | Update Account | Sign Out

Save | Print Return | Add/View Forms | Start Over | FAQs

STEP 1. Fill Out Your Tax Forms | **STEP 2. E-File Your Tax Forms**

Every applicable section of the form on this page must be completed.

Click on the “Electronic Filing Instructions” link at the bottom of this page and read the requirements to activate the **E-File Now** button.

The **E-File Now** button is located to the right of this sentence and will be activated once all applicable required sections are completed.

E-File Now

Required Information For Electronic Filing - Complete All 4 Sections Below

Section 1: Federal Information Needed for Virginia Return

Required Information in the “STEP 2” Tab

Data is required in the following fields and must be filled out in Step 2.

- Virginia Withholding information in Section 1
- Taxpayer’s 5-digit Electronic Signature Pin in Section 2.
- Spouse’s 5-digit Electronic Signature Pin in Section 2 (for filing status Married Filing Jointly).
- Email Address and Re-entered e-mail address in Section 3.

Preparing & e-Filing Your Form 760 – “STEP 2” Tab (continued)

1. Begin reviewing the 1st section of the “STEP 2” Tab.

STEP 1. Fill Out Your Tax Forms | **STEP 2. E-File Your Tax Forms**

Required Information For Electronic Filing - Complete All 4 Sections Below

Section 1: Federal Information Needed for Virginia Return

A. Federal Withholding
 If you received a Form W-2, 1099-R, W-2G, 1099-G, or 1099-MISC that has Virginia withholding on it, you are required to enter specific information for each of the forms received. You must enter the information exactly as it appears on the form. If you have multiple forms, use the Add button to enter information from each form separately.

Example: If you received two Forms W-2, click the Add button next to the Form W-2 and enter the information for your first Form W-2. After completing the first Form W-2, select the Add button again and enter the information for the second Form W-2. Repeat this for each of the types of forms listed below that you received.

Form W-2 Wage & Tax Statement

Form W-2G Certain Gambling Winnings

Form 1099-R Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

Form 1099-G Certain Government Payment

Form 1099-MISC Miscellaneous Income

Check the box if you do not have any of the above forms to enter

B. Schedule FED
 If you file federal Schedule C and/or Schedule F, you need to complete the Virginia Schedule FED. Select the "View/Add Forms" button, add the schedule and enter the items needed to complete the form. You may complete the items based upon any combination of two Schedule C's or F's. Also complete this schedule if you file Form 2106 or Form 4562 with your federal return.

Box must be checked when no Virginia Withholding is claimed for these forms.

2. If you claimed Virginia Withholding (Lines 20a / 20b, Form 760),
 - A. Click the “Add” button next to the Form you need to report.
 - B. Scroll down and complete all lines of the withholding form.
NOTE: It is recommended to provide all information, including the employee’s name and Social Security Number. It is important to click the cursor into each field for entry. Required fields will be identified as indicated in the example below.
 - C. Click the “Done With This Form” button to display the “STEP 2 Tab” screen.
 - D. Repeat Steps 2A – 2C until all withholding forms are reported.

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Save | Print Return | Add/View Forms | Start Over | FAQs

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In Addition to wage and withholding information, employee/ employer names, addresses, and identification numbers are required

a Employee's social security number **required** OMB No. 1545-0008 Safe, accurate, FAST! Use Visit the IRS website at www.irs.gov/efile

b Employer identification number (EIN) **required**

c Employer's name, address, and ZIP code **required**
 Name **required**
 Name **required**
 Street **required**
 City **required**

1 Wages, tips, other compensation

2 Federal income tax withheld

3 Social security wages

4 Social security tax withheld

5 Medicare wages and tips

6 Medicare tax withheld

Form W-2 Example

3. If there is no Virginia Withholding to claim on your withholding forms, check the box below the list of withholding forms in Section 1, Part A.

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B. Schedule FED
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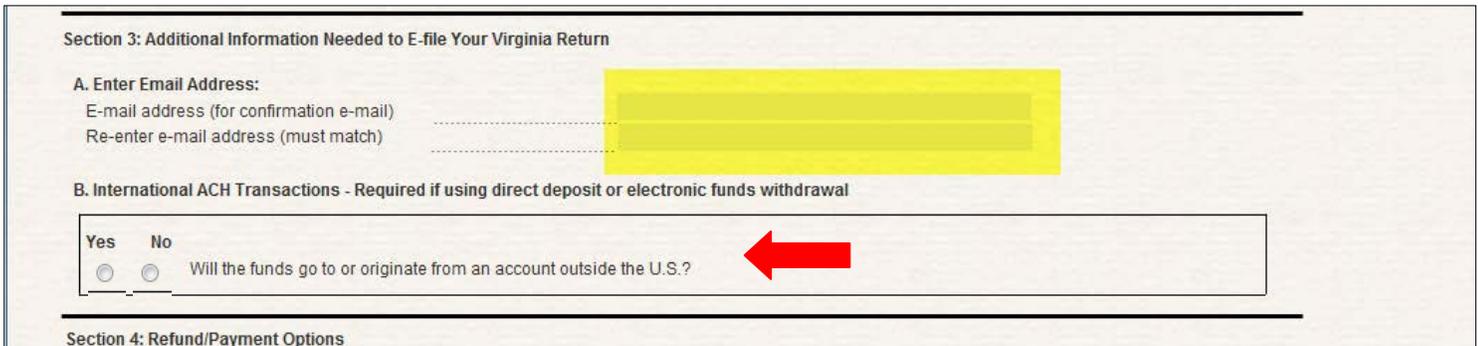
4. If you need to complete Virginia Schedule FED, complete the form according to the instructions displayed in Section 1, Part B.

Preparing & e-Filing Your Form 760 – “STEP 2” Tab (continued)

- Begin reviewing the 2nd section of the “STEP 2” Tab.
NOTE: This does not apply to taxpayers who must print and mail their return to the Tax Department.
- Enter a 5-digit PIN to serve as your electronic signature on the Fillable Forms return.
NOTE: It is recommended to keep a copy of your PIN with your tax records.
- If the filing status is Married Filing Jointly, enter a 5-digit PIN in the Spouse field.



- Begin reviewing the 3rd section of the “STEP 2” Tab.
NOTE: This does not apply to taxpayers who must print and mail their return to the Tax Department.
- Enter a valid email address to receive your Fillable Forms confirmation email.
- Enter the same valid email address again to ensure it matches the first



- Answer the “International ACH Transactions” question.
NOTE: This applies if you have a refund that uses Direct Deposit or a tax due payment due you want withdrawn electronically by the Tax Department.

International ACH Transactions

Federal banking regulations have imposed additional reporting requirements on all electronic banking transactions that directly involve a financial institution outside of the territorial jurisdiction of the US at any point in the process. These are called International ACH Transactions (IAT), which the Virginia Tax Department does not support.

If an IAT is processed by the Virginia Tax Department as a domestic transaction, the bank may reject it and subject the customer to late penalties. By instructing the Virginia Tax Department to process the electronic banking transactions contained in your Fillable Forms submission (refund or tax due payment), you certify that the transactions do not directly involve a financial institution outside of the territorial jurisdiction of the US at any point in the process.

Preparing & e-Filing Your Form 760 – “STEP 2” Tab (continued)

12. Begin reviewing the 4th section of the “STEP 2” Tab.

NOTE: This does not apply to taxpayers who must print and mail their return (with a tax due payment) to the Tax Department.

Section 4: Refund/Payment Options

A. Refund - Do not enter refund information here. Select your refund method on Form 760 and enter your direct deposit information there. Paper checks will **NOT** be issued by the state of Virginia.

B. Paying Tax Due by Check - If you are paying with a check, print Form 760-PMT or 760-PFF and mail it with your check to the Virginia Department of Taxation.

C. Electronic Funds Withdrawal of Tax Due - If you would like to pay your tax balance due using electronic funds withdrawal enter the required information below.

Note : Do **not** enter direct deposit information here, enter it on Form 760.

I Agree
By filling in the information below I agree to pay my tax balance due by electronic funds withdrawal

Routing number Account number
Type: **Checking** **Savings**
Date to make withdrawal mm/dd/yyyy

13. If you owed a tax due amount (Line 37, Form 760), review your payment options.

A. If you are paying by check,

1. Click the Add/View Forms button.
2. Complete and print the payment voucher (760-PMT or 760-PFF).
3. Click the “Done With This Form” button to display the “STEP 2 Tab” screen.

B. If you want the Tax Department to withdraw the funds electronically,

1. Check the “electronic funds withdrawal agreement” checkbox under Section 4, Part C.
2. Continue to Step 14 to provide the required banking information.

14. Provide the banking information.

NOTE: Taxpayers must not enter bank information in Section 4 if the return is a refund return.

- A. Enter your Routing Number and your Account Number.
- B. Select the Type of Account – Checking or Savings.

NOTE: Forgetting to select the Type of Account will cause the return to be rejected.

- C. Enter a Date for withdrawal – Warehousing a payment for a future date is available only until the Virginia due date.

15. Click the “E-file Now” button.

NOTE: This will cause your return to be e-Filed to the Tax Department. The button will not be active until all information in the “STEP 1” Tab and the “STEP 2” Tab (Sections 1 – 4) are complete.

STEP 1. Fill Out Your Tax Forms | **STEP 2. E-File Your Tax Forms**

Every applicable section of the form on this page must be completed.

Click on the “Electronic Filing Instructions” link at the bottom of this page and read the requirements to activate the **E-File Now** button.

The **E-File Now** button is located to the right of this sentence and will be activated once all applicable required sections are completed.

E-File Now

After “e-File Now” is Clicked

After the “e-File Now” button is clicked, a message displays with two options: to e-File the return or to review the return.

Ready to E-File

When you select 'Continue to E-File', your tax return will be transmitted to the Virginia taxing authority. To ensure a successful e-file, make sure you have completed all the following since your tax return could be rejected for incorrect or incomplete information.

1. Double check amounts entered from your 2014 federal return.
2. Calculated and entered your tax amount.
3. Add all forms that have state withholding (see Step 2).

[Back to Forms](#) [Continue to E-File](#)

1. If you need to review your return again, click the “Back to Forms” button.
NOTE: Your return will not be filed until you complete the e-File Now steps.
2. If you want to submit your return to the Tax Department, click the “Continue to E-File” button.

Transmission Successful

You have e-filed your taxes.

Your forms have been successfully transmitted to the Virginia Department of Taxation. Please watch your email for two messages from Virginia State Fillable Forms.

1. In a few seconds, a confirmation of your successful e-file transmission.
2. In 24-48 hours, a message when your tax return is accepted or rejected by the Virginia Department of Taxation.

These messages will come from customer_service@statefillableforms.com.

[Logout](#)

3. Click the “Logout” button.
4. If you want to print a copy of your filed return, click the “Start Fillable Forms” button to access your filed return.

[Start State Fillable Forms](#)

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5. Click the “Print Return” button.
NOTE: The Tax Department recommends that taxpayers print a copy of the return for their records. The information on the Fillable Forms site will only be accessible until approximately October 19, 2015.

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