Virginia Department of Taxation

Virginia Free Fillable Forms User Guide

Tax Year 2014

Rev.02/2015

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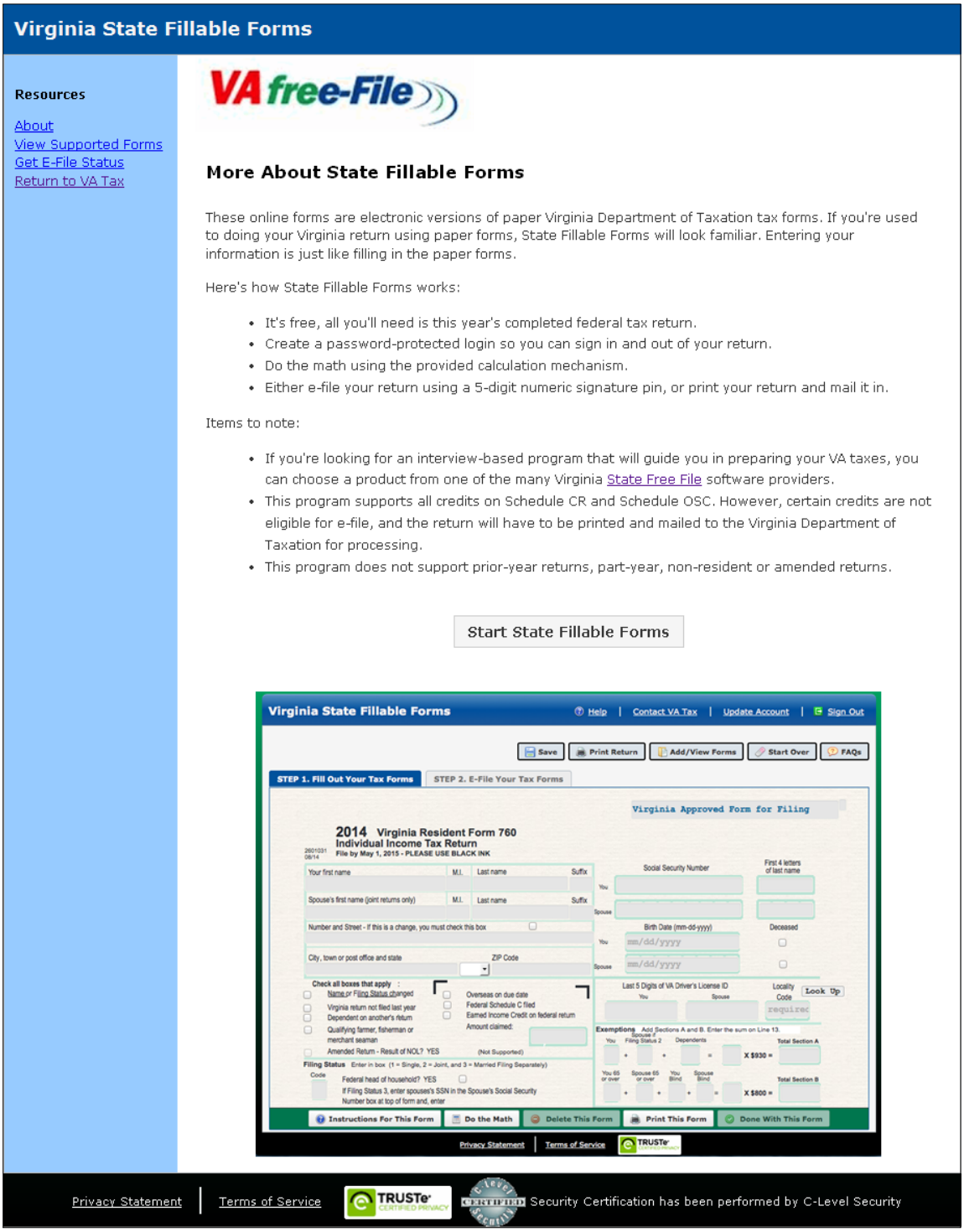
Introduction

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.



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 compete 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:

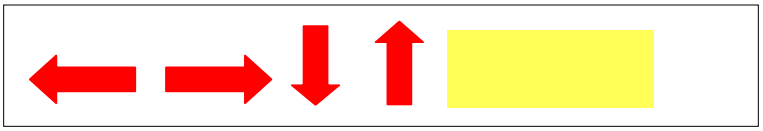
- A copy of your 2014 federal tax return
- All income and tax statements you received for 2014
  NOTE: Examples include W-2, W-2G, 1099-G, 1099-MISC, and 1099-R.
- Any 2014 estimated tax payment amounts
- If using direct deposit for a refund, or if using direct debit withdrawal to pay taxes owed, have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

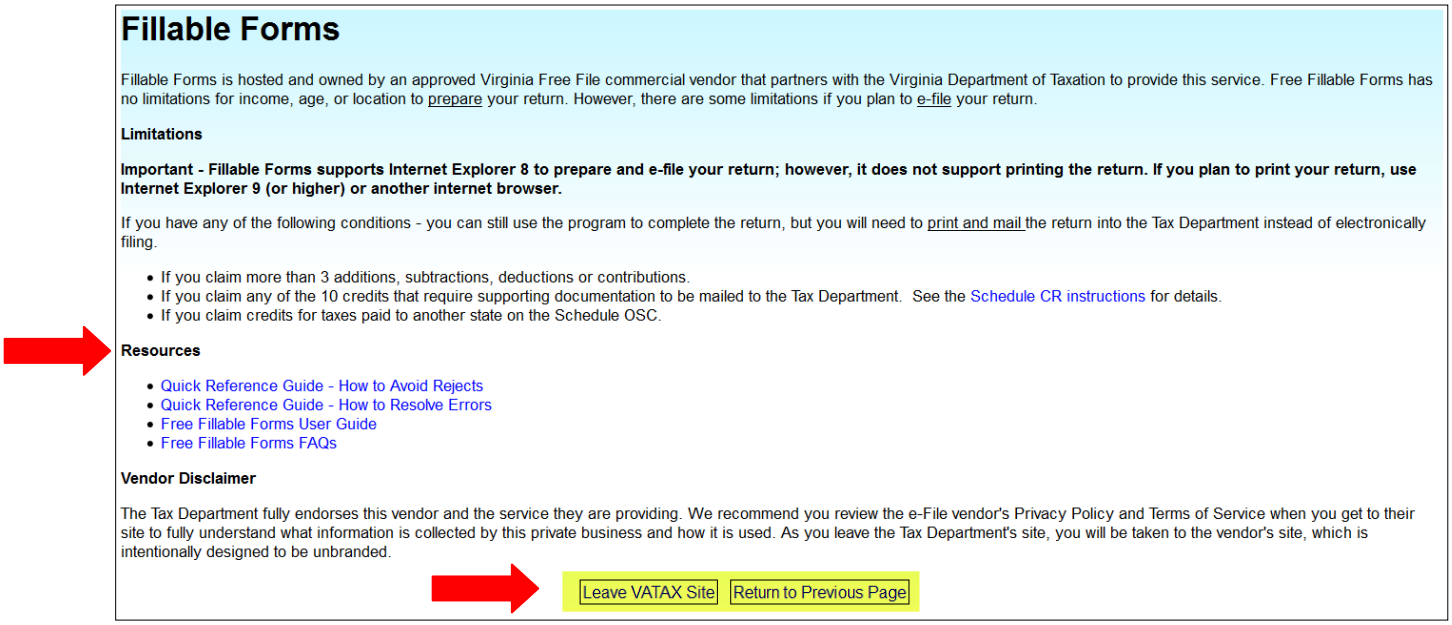
Get your tax refund fast using e-File!

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
Free File is a free federal and state income tax preparation and electronic filing program offered to customers based on income and other qualifiers. To ensure you can file both your federal and state returns for free, please access these Free File products from our website.	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. Most customers can e-file their return when it is complete. Certain conditions apply that require the completed return to be mailed instead. • Quick Reference - Avoid Rejects • Quick Reference - Resolve Errors • Fillable Forms User Guide • Fillable Forms FAQs	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. Many of these programs charge a small fee and can be purchased online or over the counter.

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

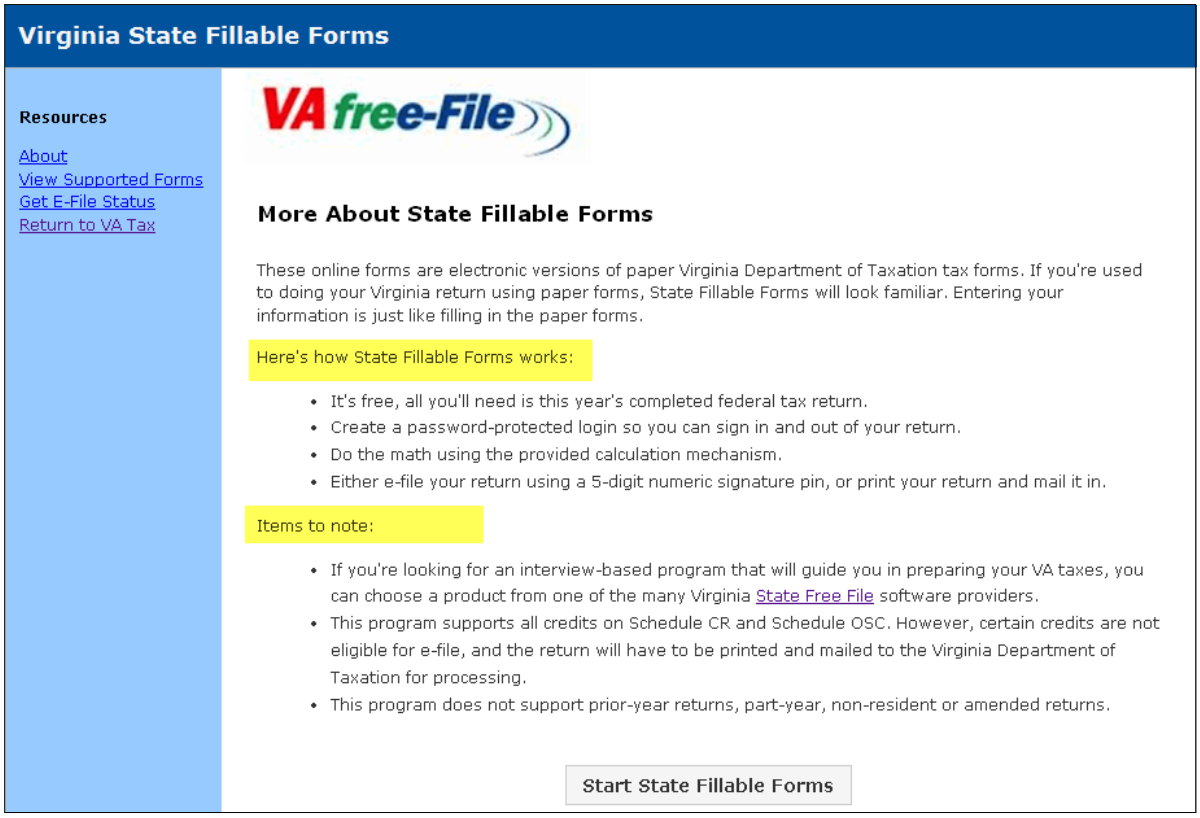
- Quick Reference Guide - How to Avoid Rejects
- Quick Reference Guide - How to Resolve Errors
- Free Fillable Forms User Guide
- Free Fillable Forms FAQs

Vendor Disclaimer

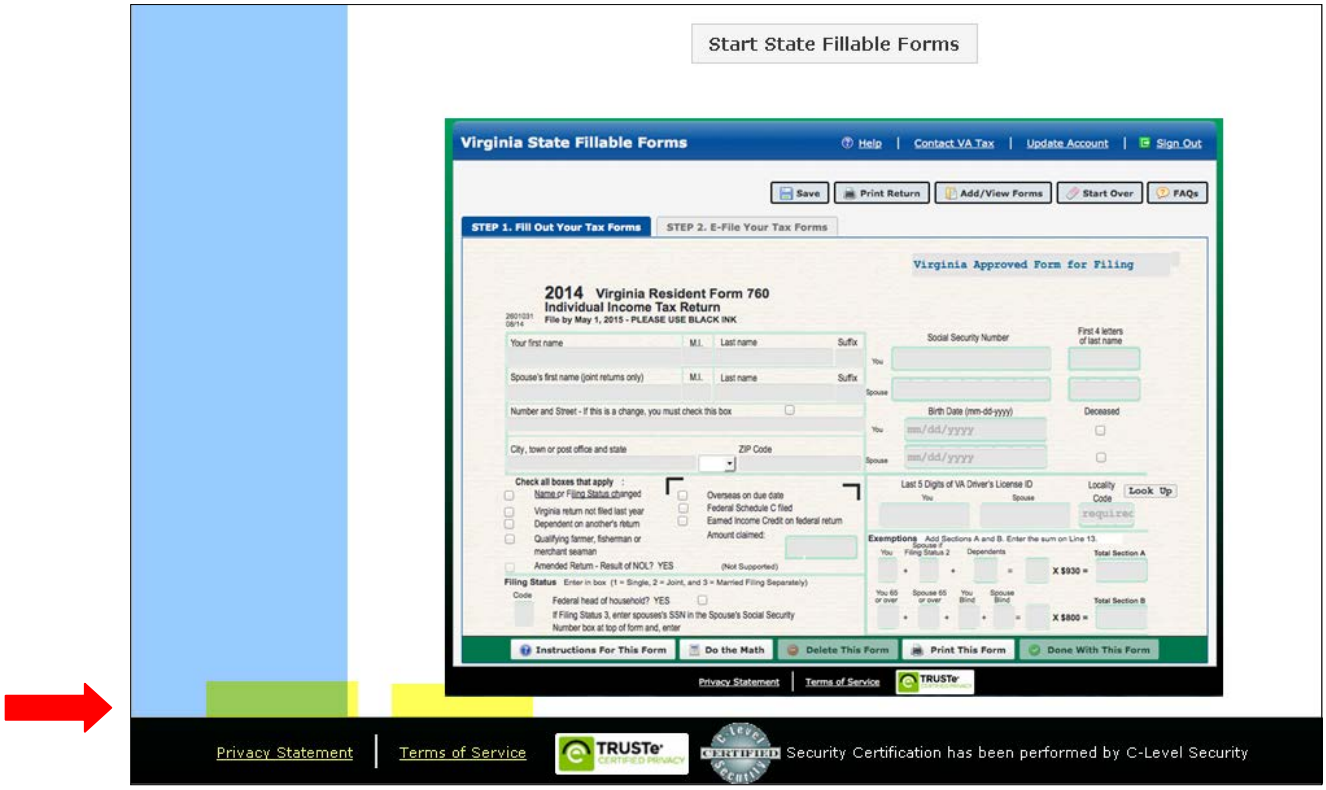
The Tax Department fully endorses this vendor and the service they are providing. We recommend you review the e-File vendor's Privacy Policy and Terms of Service when you get to their site to fully understand what information is collected by this private business and how it is used. As you leave the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

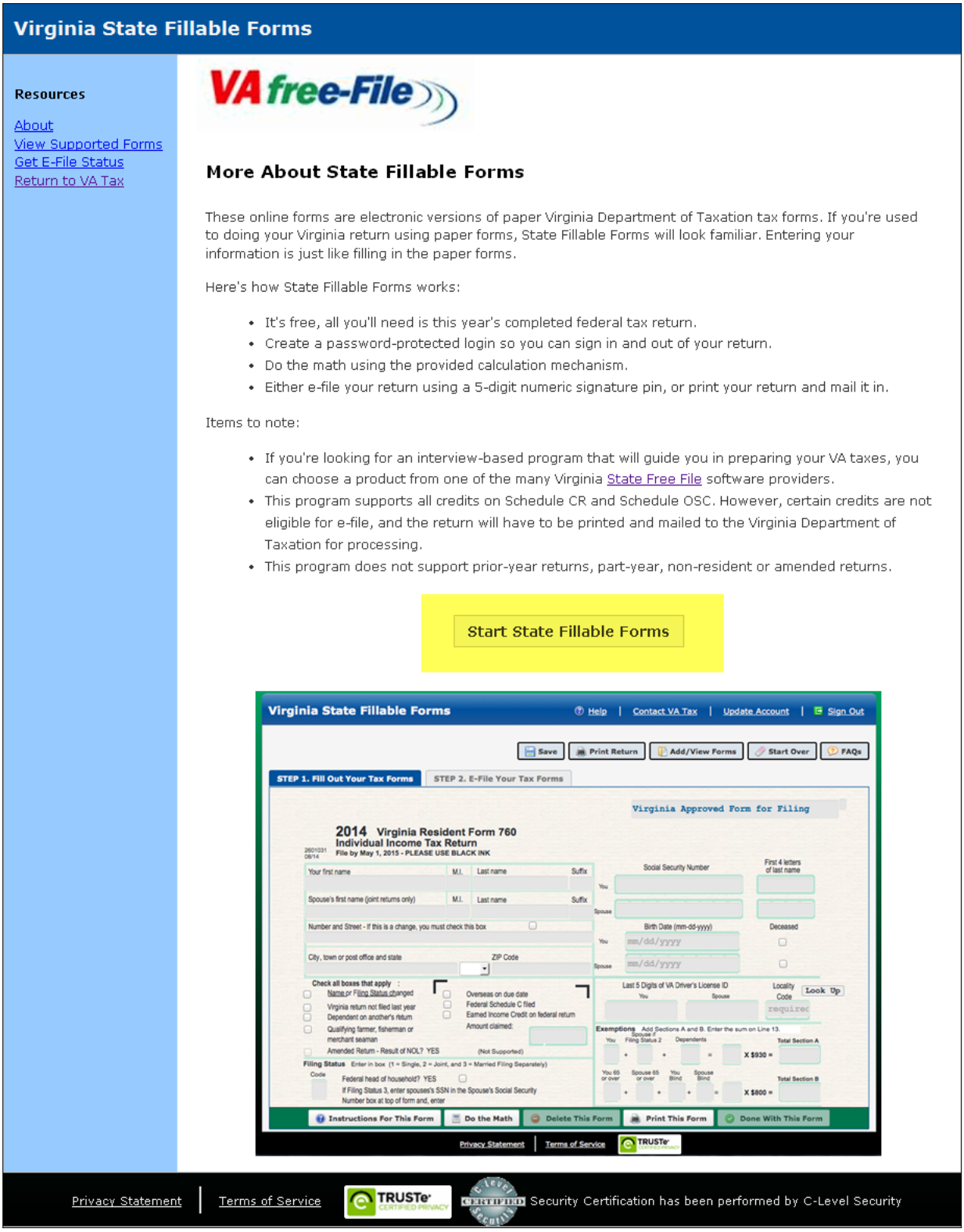
5. Review the information under the “More About State Fillable Forms”.



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



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

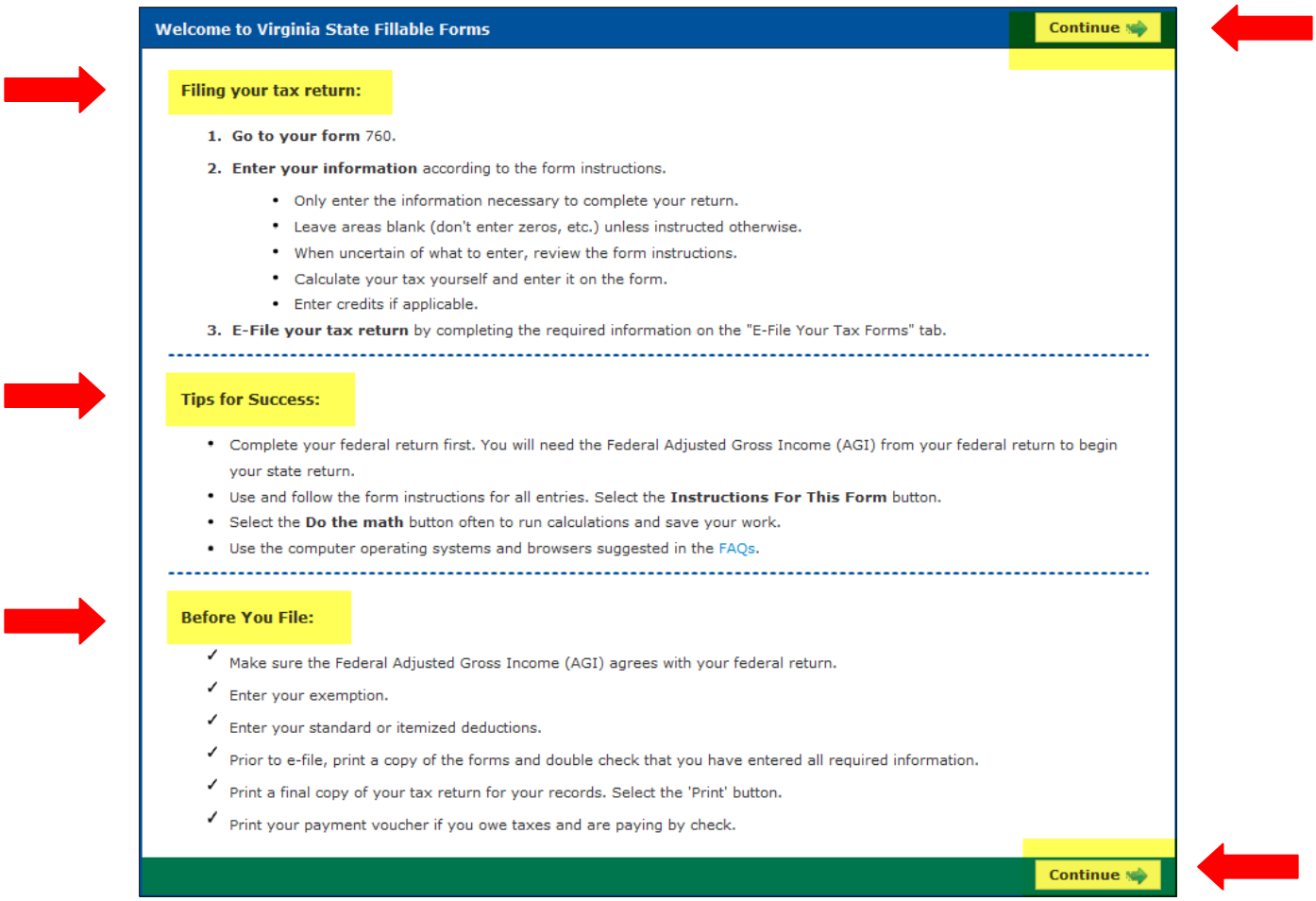


8. Continue to next section to create an account.

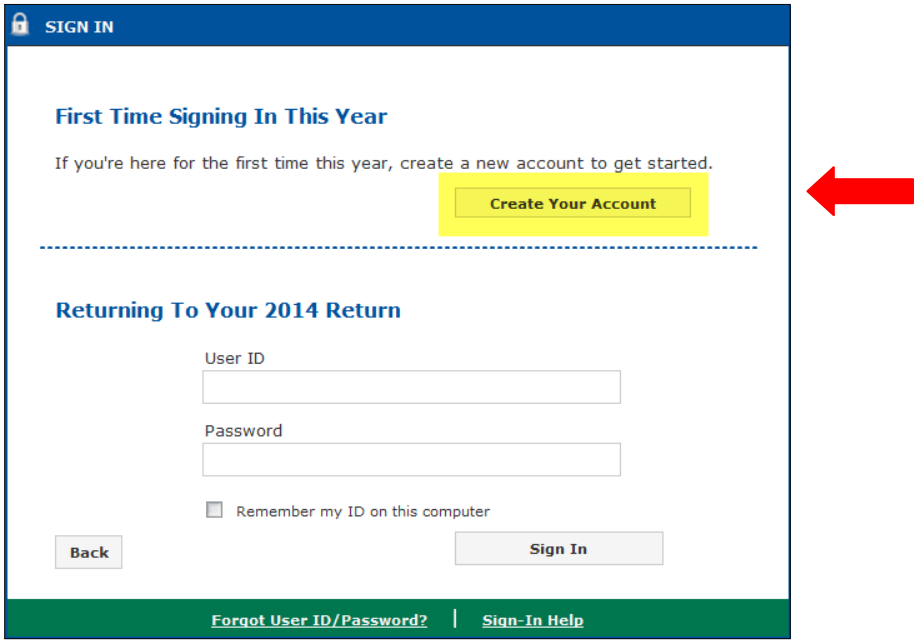
Create a Free Fillable Forms Account

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

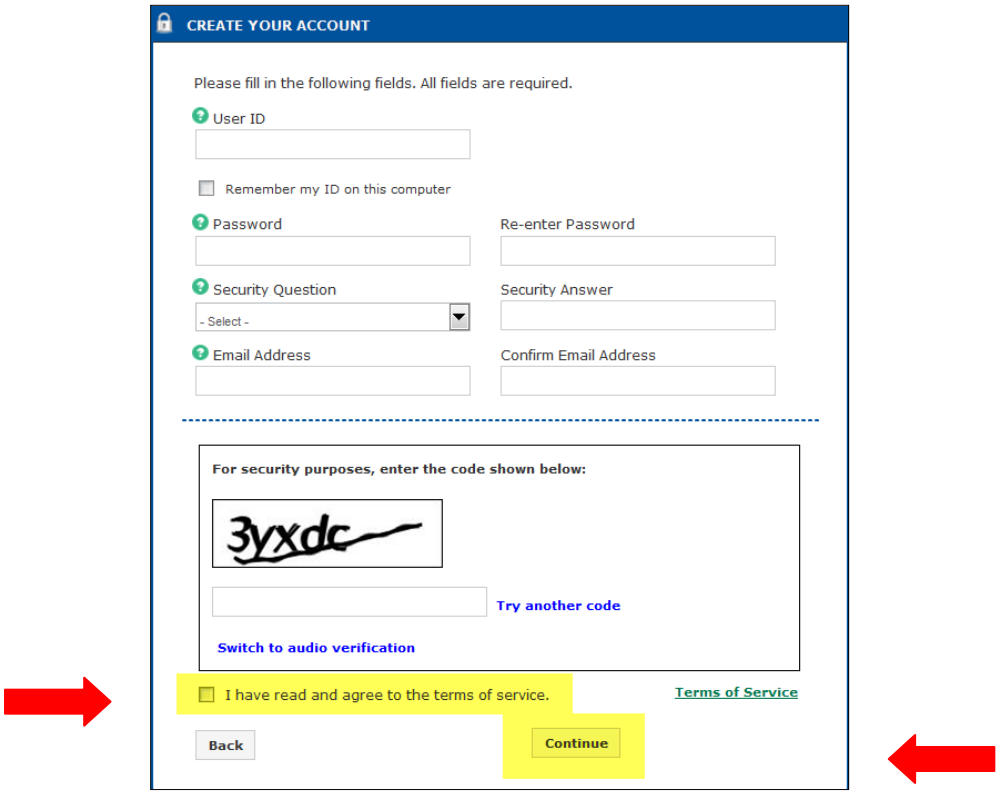
1. Review the information on the State Fillable Forms Welcome page.
2. Click “Continue” button to access the sign in window (bottom or top of the window).



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



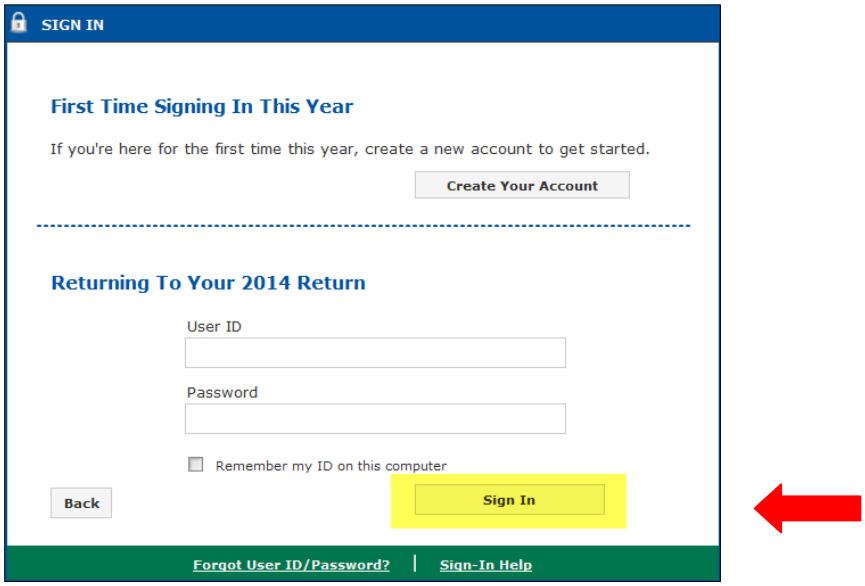
4. Enter information in all of the blank fields.



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

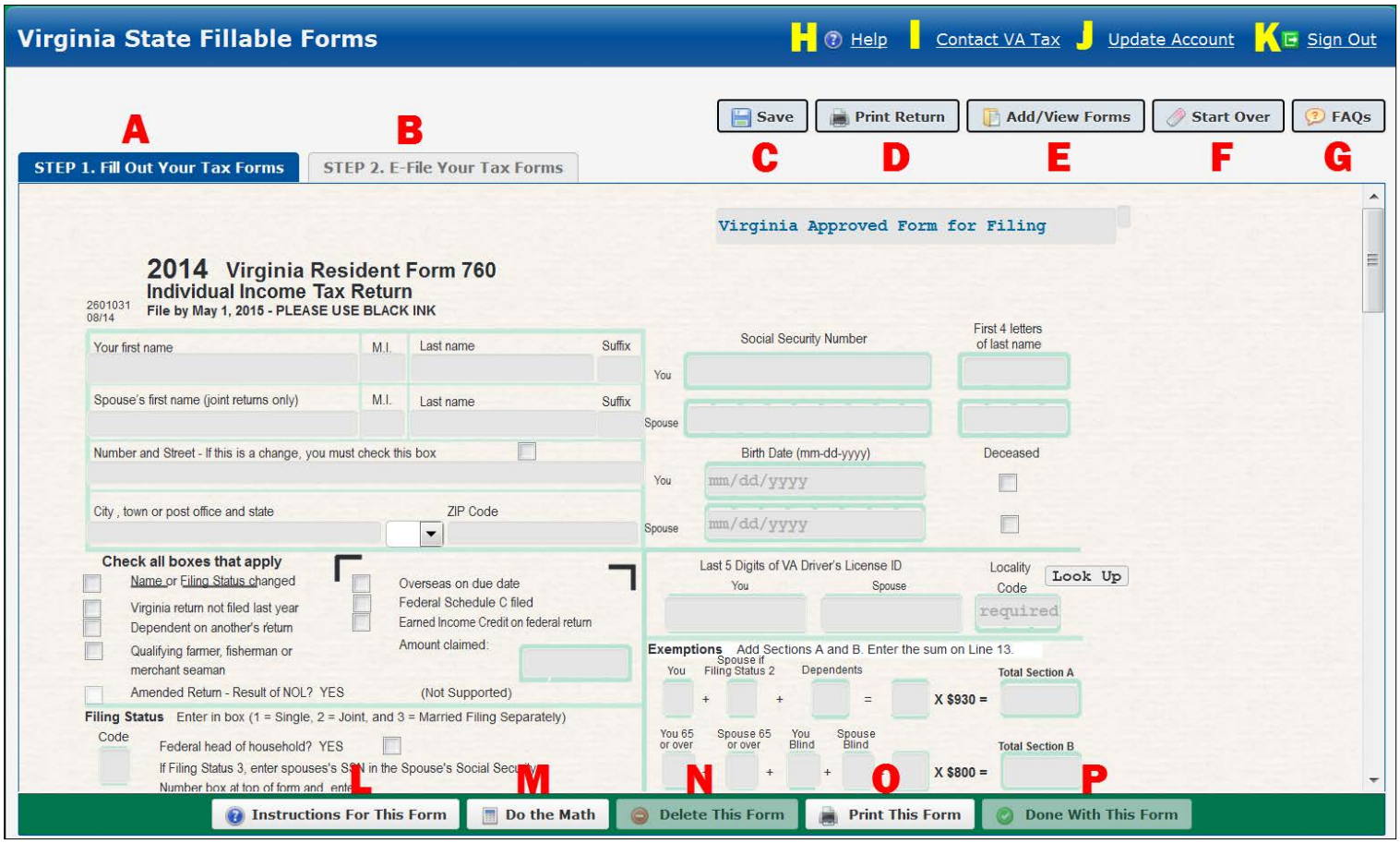
1. Provide your User ID and Password.
2. Click “Sign In” to access the Virginia State Fillable Forms window.



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.

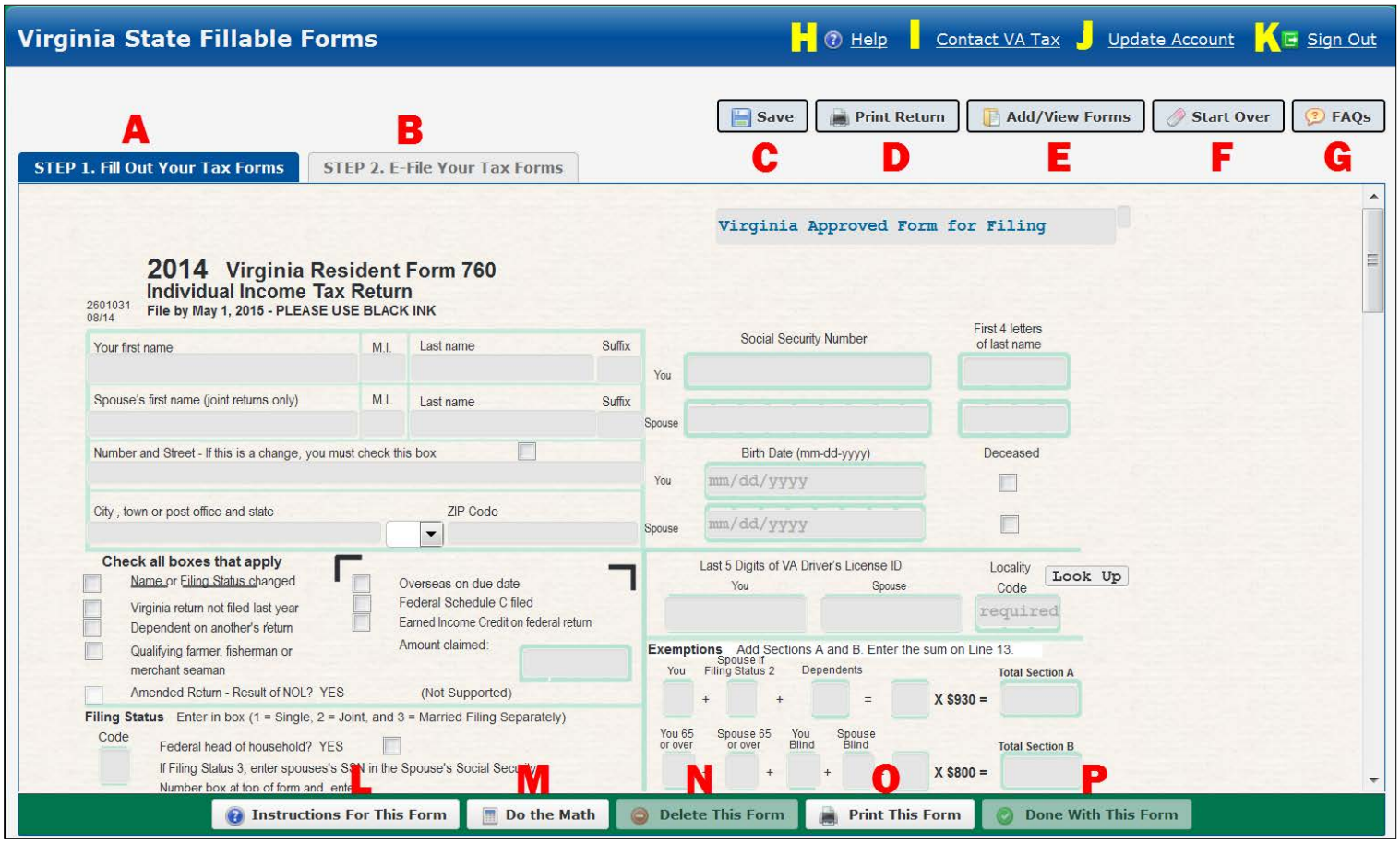
F. **Start Over** – Click the button to delete all forms and erase all data entered into Fillable Forms.

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)



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.

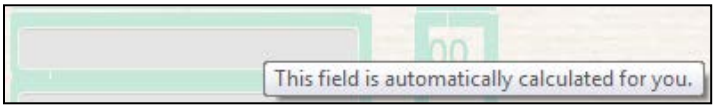
Radio Button

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.

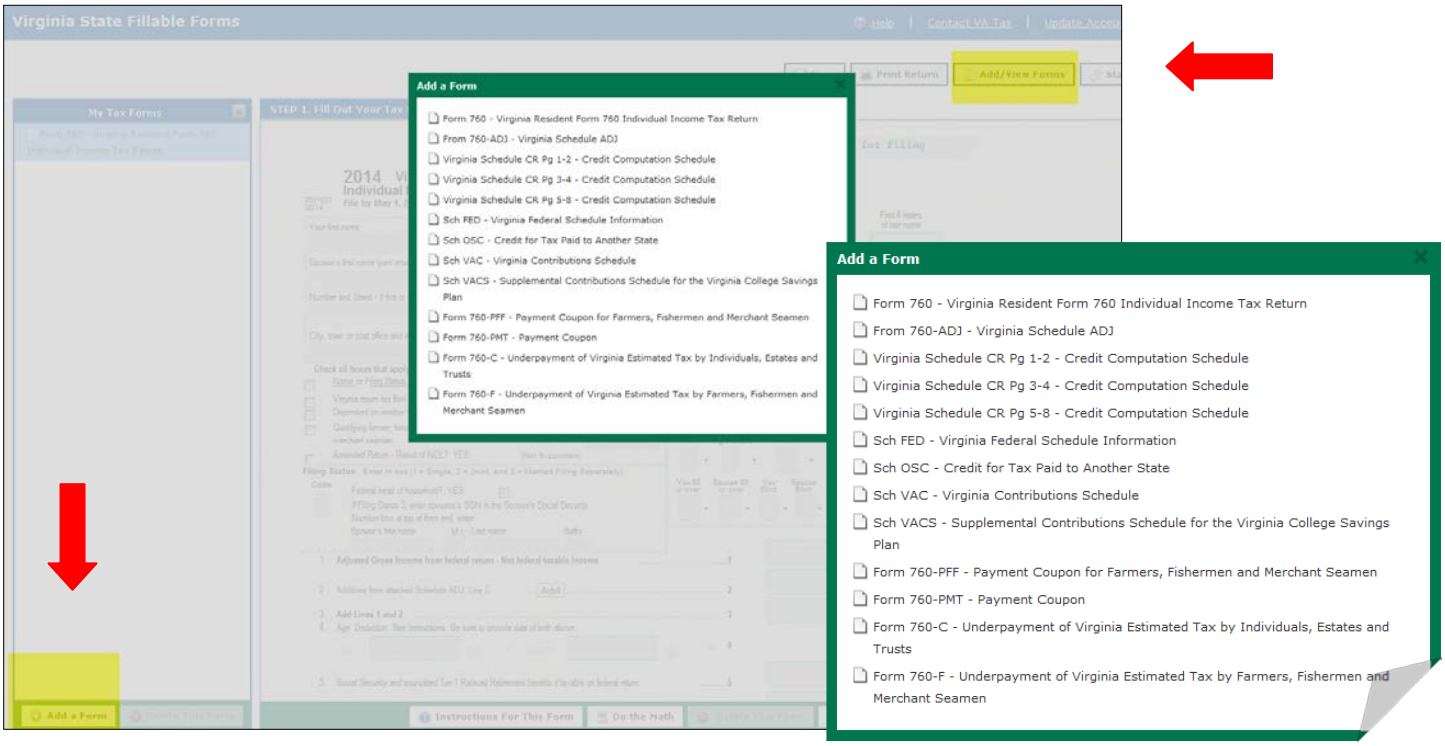
Adding / Deleting Forms & Schedules

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

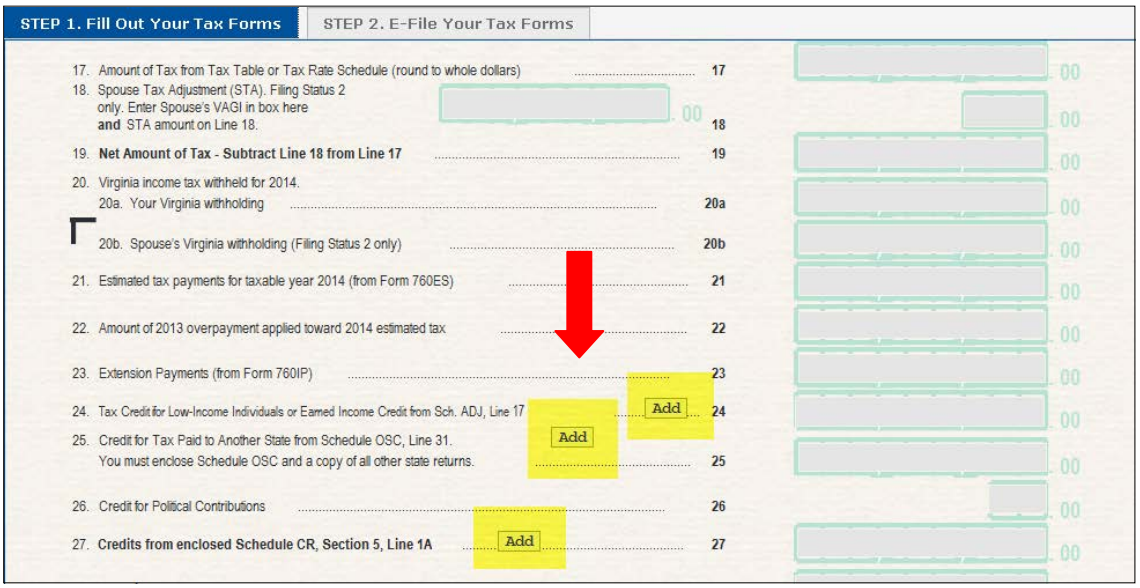
Anytime an "added form" is open, the previously grayed out buttons (bottom of the page) are enabled.

- "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.
   A. At the bottom of the "My Tax Forms" box, select "Add a Form" to bring up the forms menu.
   B. 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.

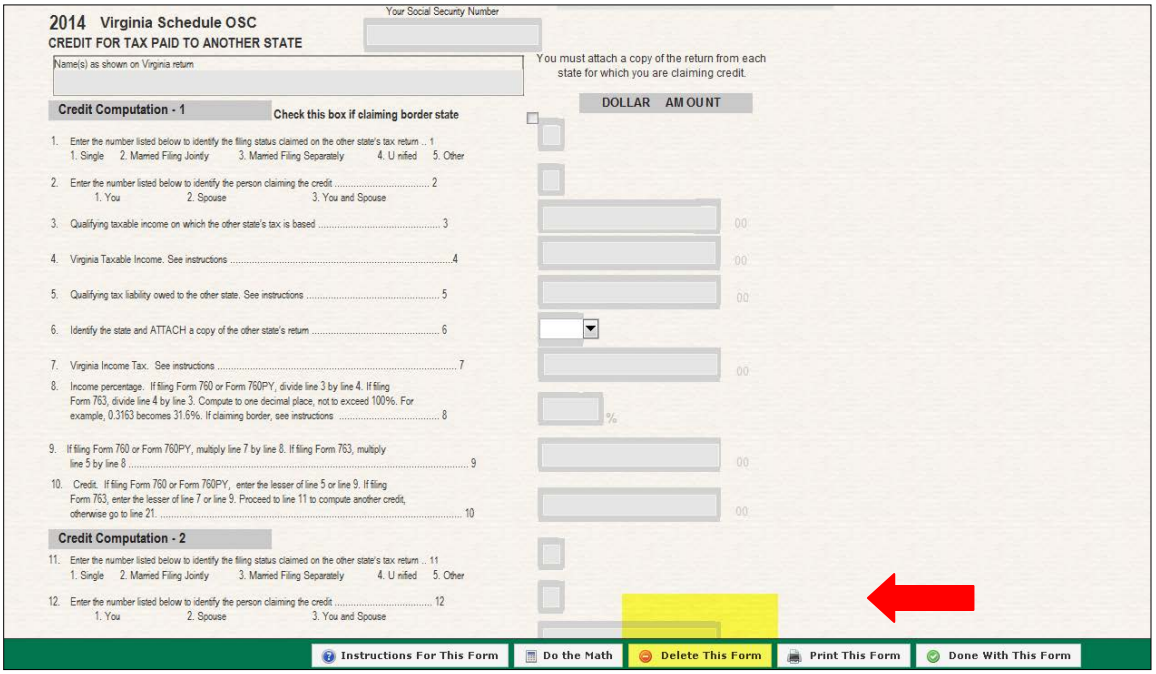


3. To add the same form multiple times, use either of the two methods described above.
   NOTE: This applies only to when needing more than one page of Schedule OSC to prepare the return.

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”.



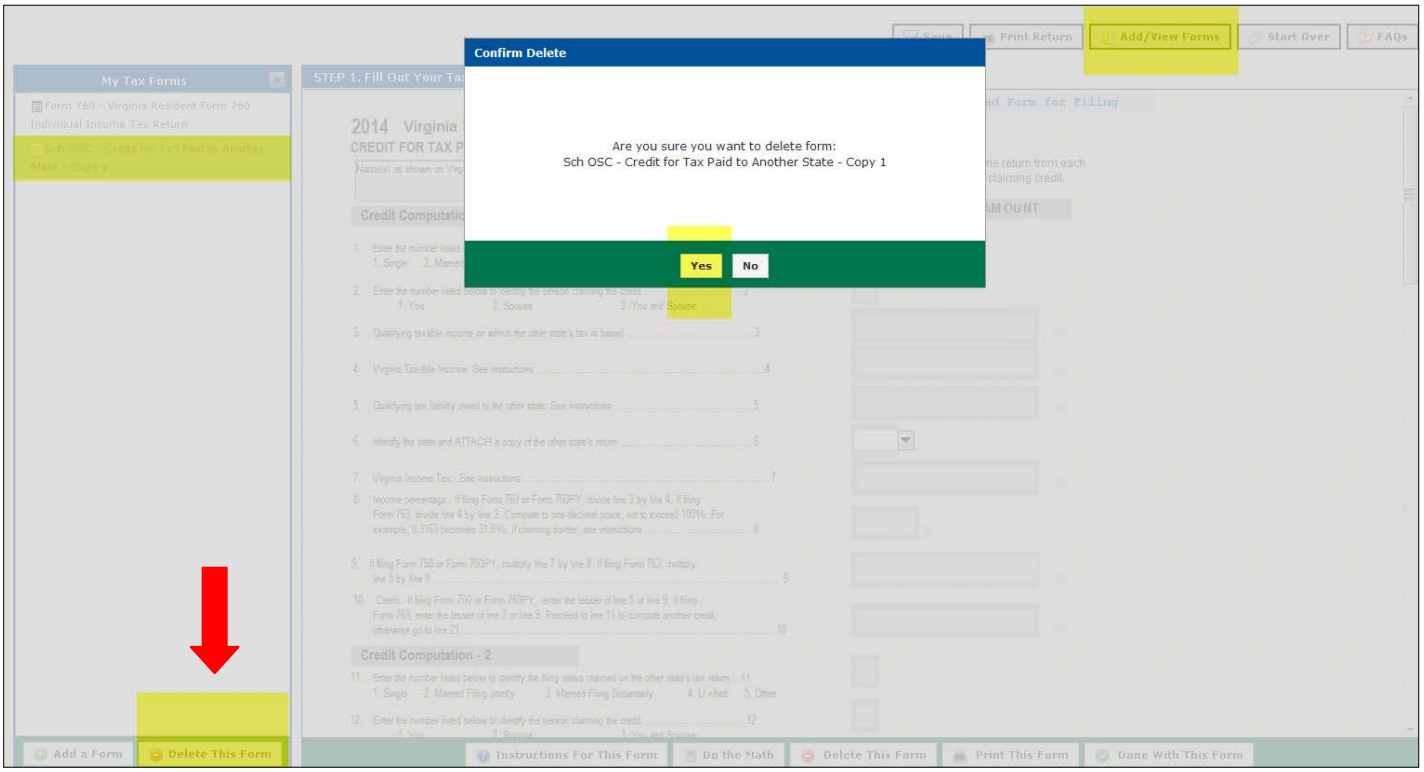
2. If the form is not presently displayed on your screen,

   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.

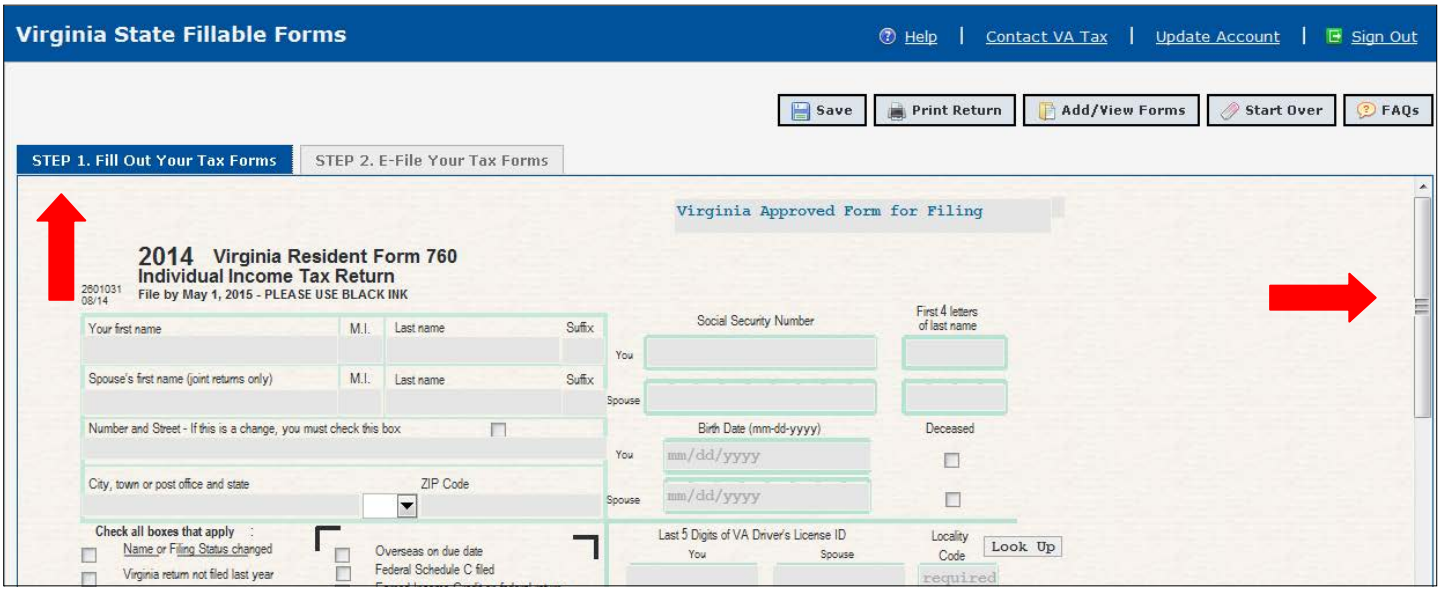
   D. Select “Yes” in the “Confirm Delete” window.



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.



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

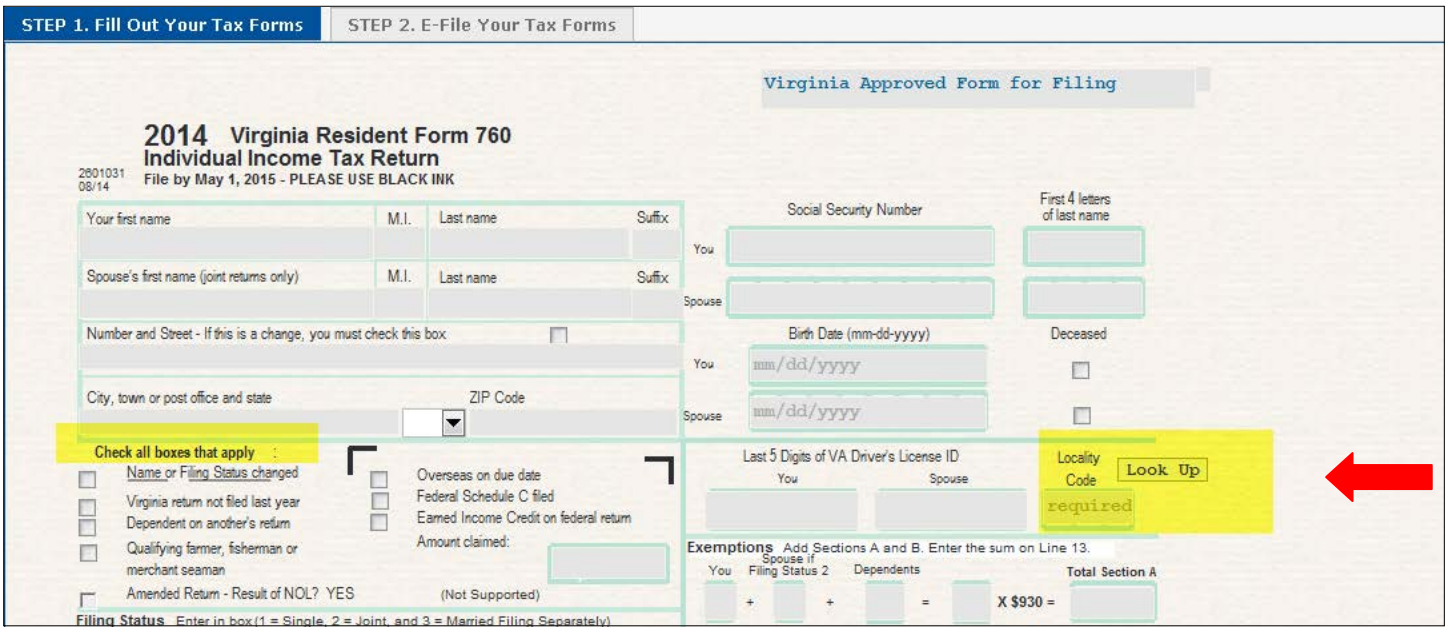
Do not provide zeroes in amount fields if no other additions, subtractions, deductions, credits, codes, etc. are being claimed.

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)

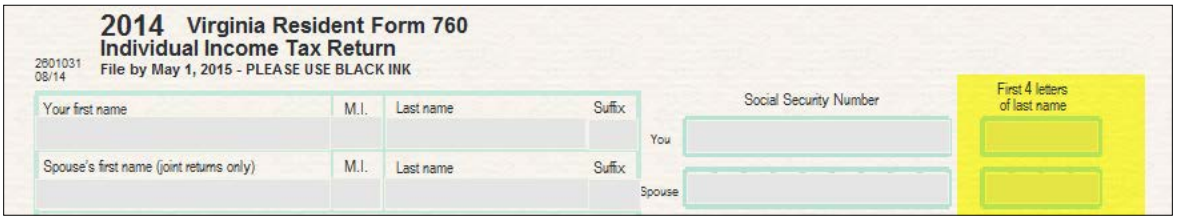
This section of provide steps to prepare the "STEP 1" portion of your Form 760 (with related schedules). Missing information causes returns to be rejected, so it is important to complete all information as indicated.

1. Enter your first name and last name.
2. <u>If the Filing Status is "Married Filing Jointly" or "Married Filing Separately"</u>, 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.



8. Enter your Social Security Number.
9. <u>If the Filing Status is "Married Filing Jointly" or "Married Filing Separately"</u>, 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 **<u>3-digit</u>** 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.



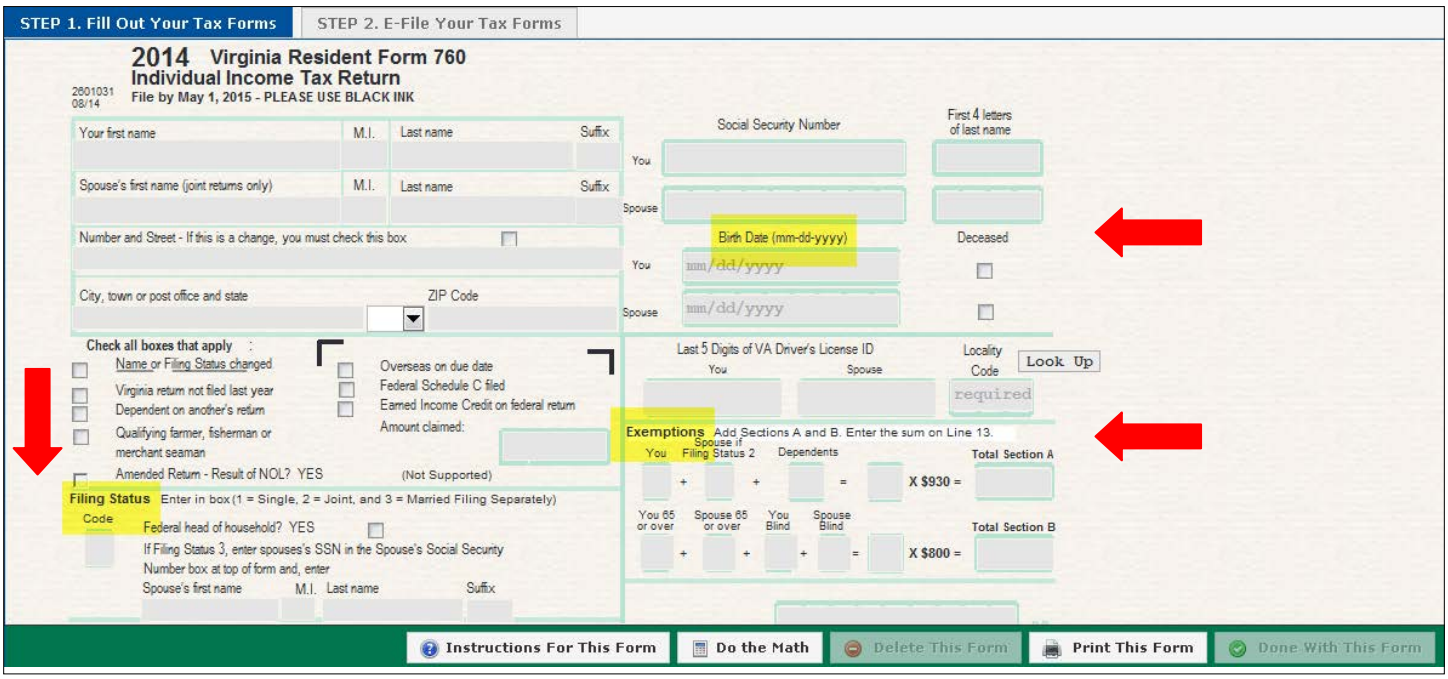
11. Select the applicable Filing Status.

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.

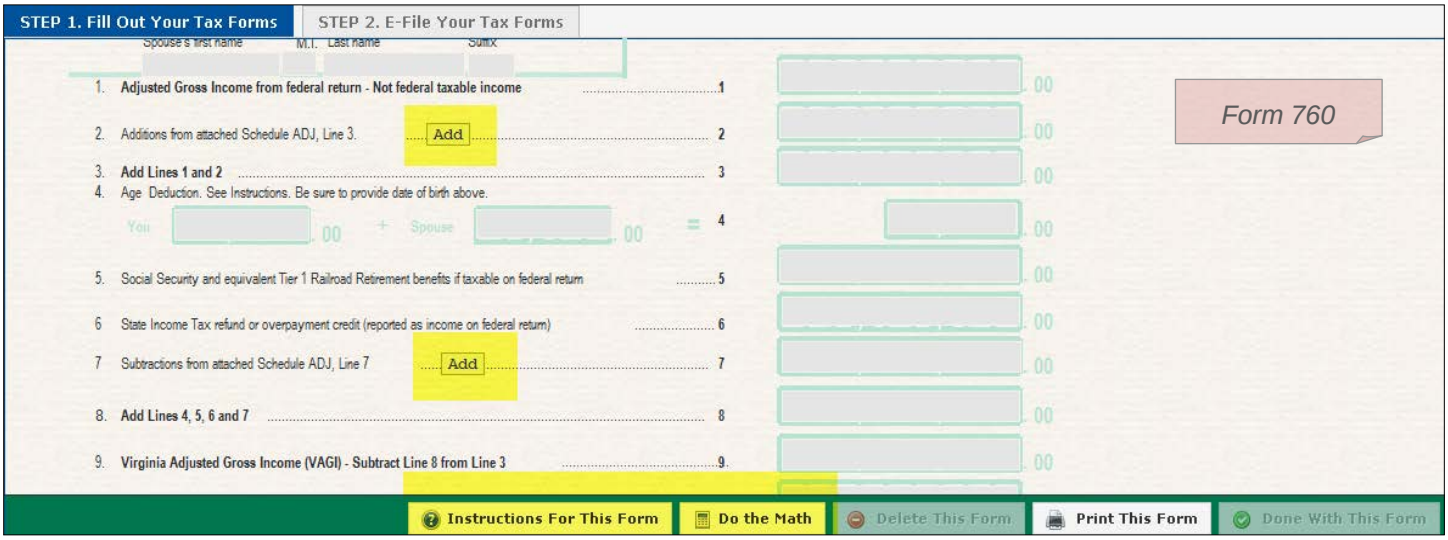
15. <u>If Filing Status is "Married Filing Jointly"</u>, enter Spouse's birth date.



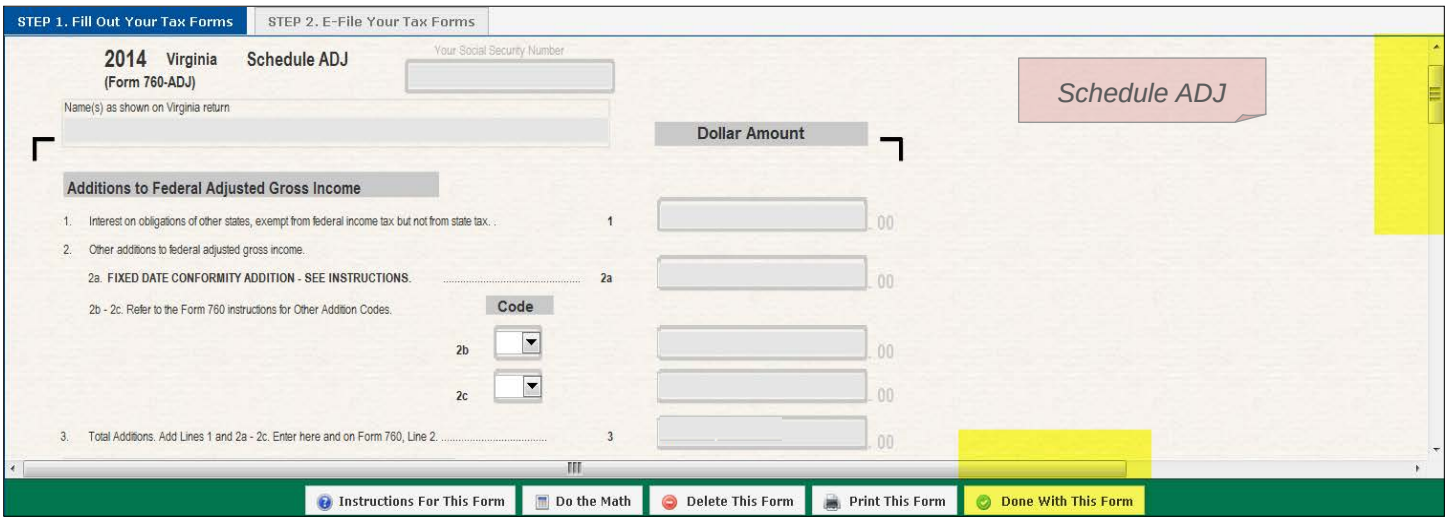
16. Continue working through the Virginia Resident return (Form 760) starting with Line 1.

17. <u>If you need 760 line instructions</u>, 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.

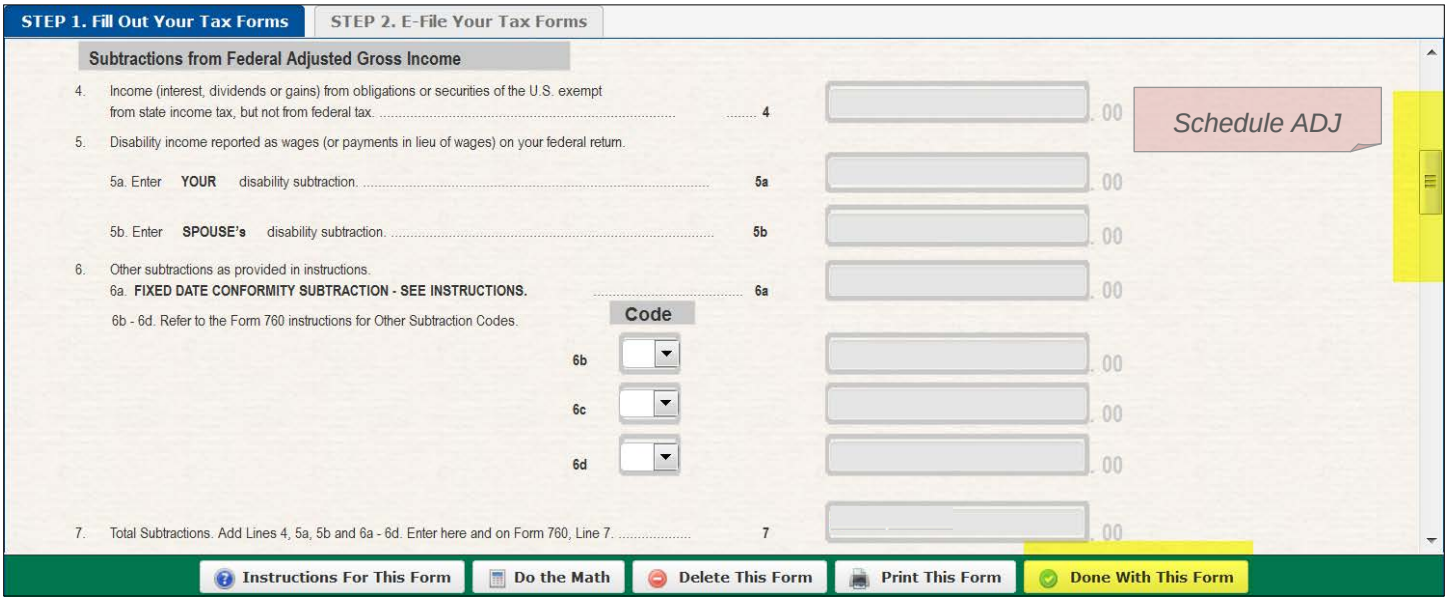


19. If you have an amount to report (other than $0) for Line 2 (Total Additions),
    A. Click the "Add" button next to Line 2.
       NOTE: A window opens for the Virginia Schedule ADJ. The window for a specific form will open when the related "Add" button is clicked.
    B. Scroll down and complete 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.



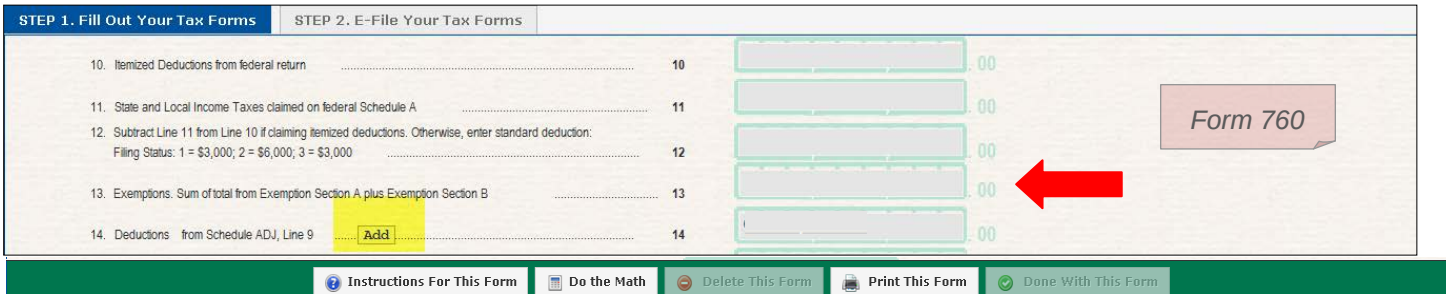
20. Continue working through the Virginia Resident return (Form 760).

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.



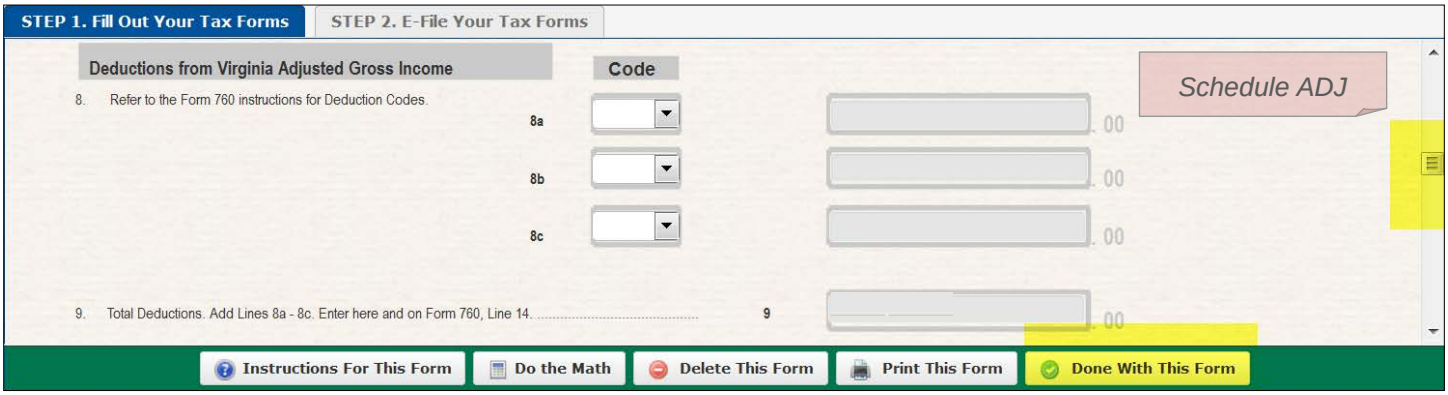
22. Continue working through the Virginia Resident return (Form 760).

Preparing Your Form 760 – "STEP 1" Tab (continued)

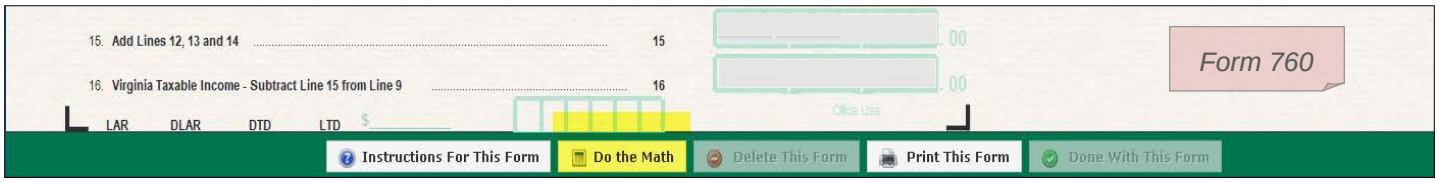


23. Enter the total Exemptions amount for Line 13.
    NOTE: The total amount from Exemptions Section A and Exemptions Section B equal the full exemptions amount

24. <u>If you have an amount to report (other than $0) for Line 14 (Deductions from VAGI)</u>,
    A. Click the "Add" button next to Line 14.
    B. Scroll down and complete the Virginia Schedule ADJ section labeled "Deductions from Virginia Adjusted Gross Income".
    C. <u>If the amount is $0</u>, do not put $0 in Line 14 of Form 760 or in the related Schedule ADJ section.
    D. Click the "Done With This Form" button to display the Form 760 screen.



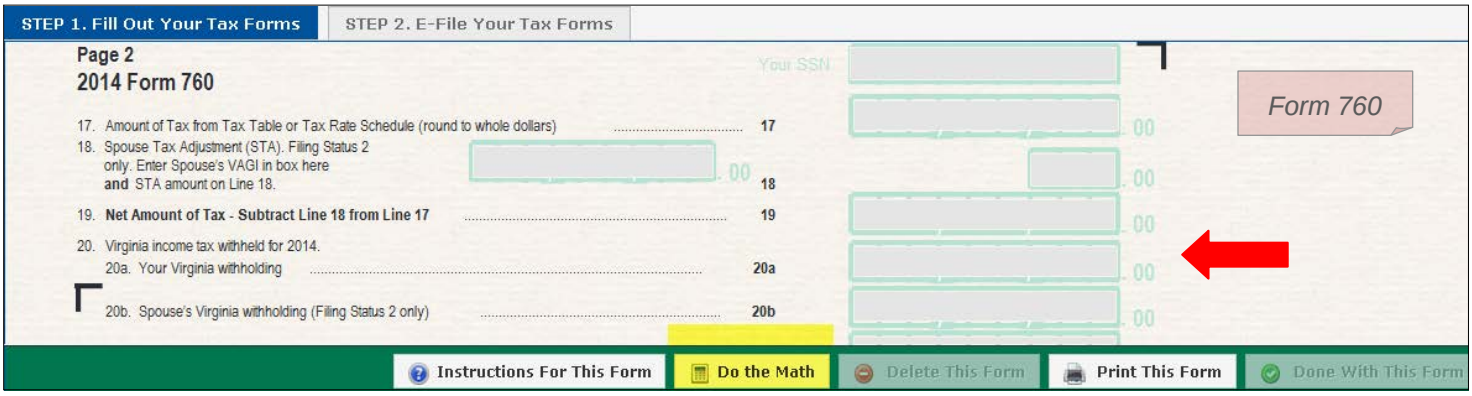
25. Continue working through the Virginia Resident return (Form 760).



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

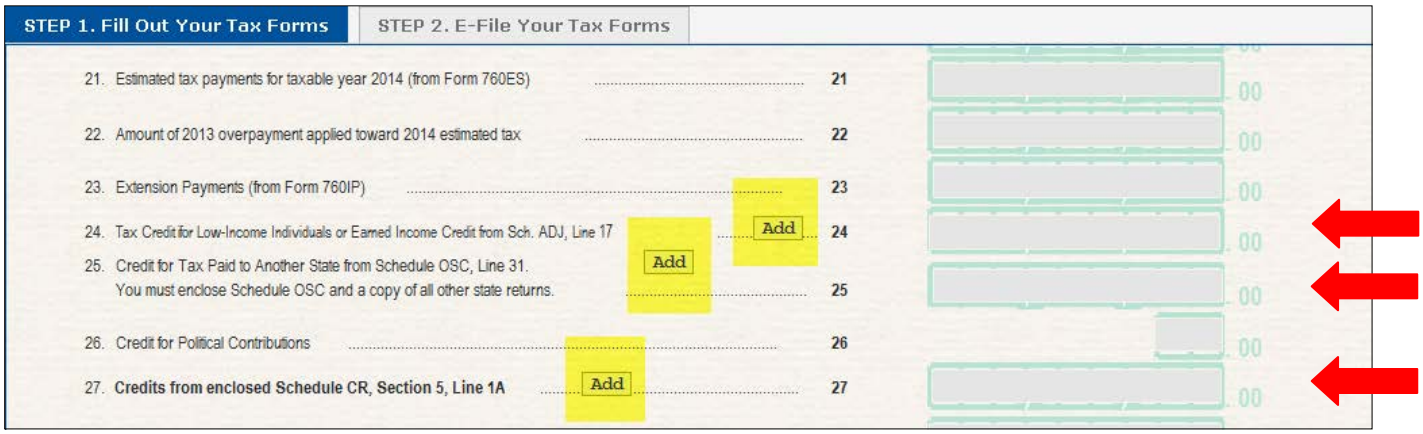
27. Enter your tax amount on Line 17.
    NOTE: Tax tables found in the instructions are used to determine the tax amount.
    A. Click on the "Instructions For This Form" button.
    B. View the tax table that starts on Page 36 of the instructions.
    C. Locate your tax amount and enter the amount on Line 17.

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

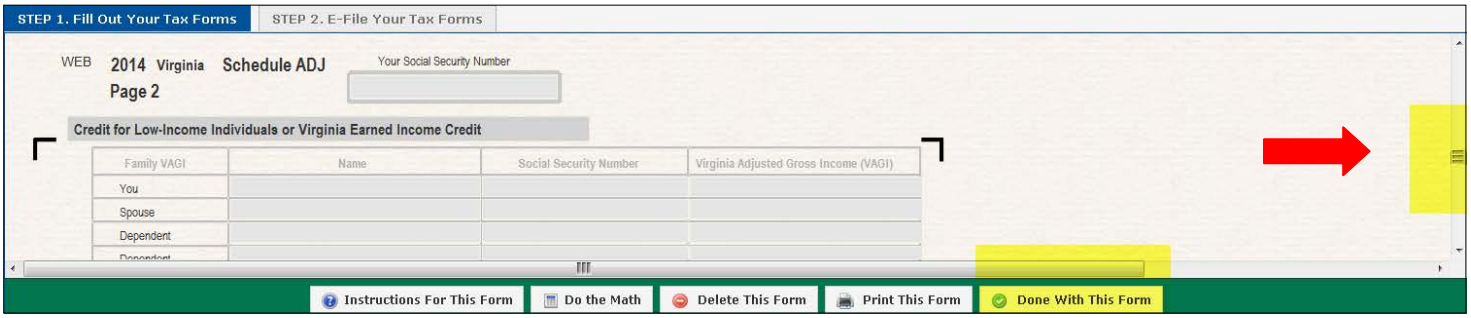


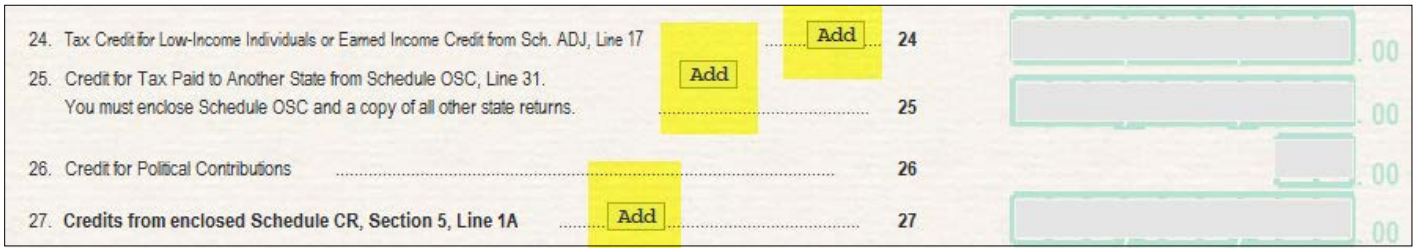
29. <u>If you have Virginia Withholding amounts to claim,</u>
    NOTE: You enter detailed withholding information (W-2, 1099, etc.) later on the "STEP 2" Tab.
    A. Enter your Virginia Withholding amount on Line 20a.
    B. Enter your Spouse's Virginia Withholding amount on Line 20b (for Married Filing Jointly).
    C. Click the "Do the Math" button.

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

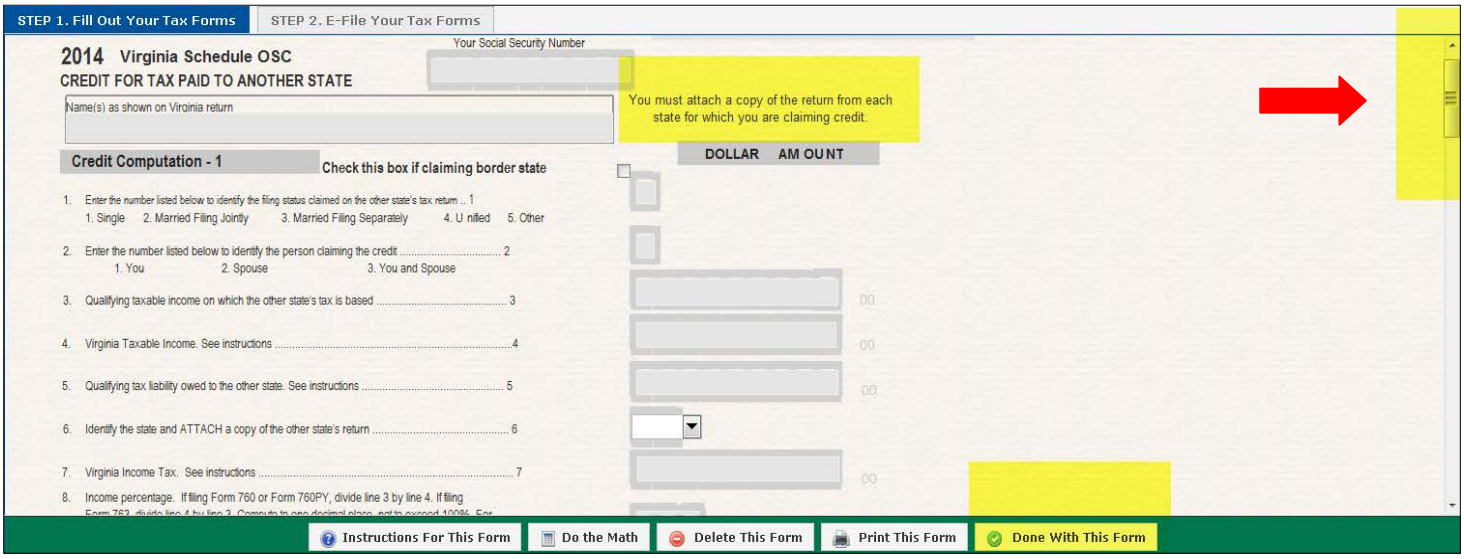


31. <u>If you qualify for credits to report on Line 24 (Low-Income Individuals or Earned Income Credit)</u>,
    A. Click the "Add" button next to Line 24.
    B. Scroll down and complete the Virginia Schedule ADJ section labeled "Credit for Low-Income Individuals or Virginia Earned Income Credit".
    C. <u>If the amount is $0</u>, 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.





32. <u>If you qualify for credits to report on Line 25 (Tax Paid to Another State)</u>,
    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.
    A. Click the "Add" button next to Line 25.
    B. Scroll down and complete the Virginia Schedule OSC.
    C. <u>If the amount is $0</u>, do not put $0 in Line 25 of Form 760 or in the Schedule OSC section(s).
    D. Click the "Done With This Form" button to display the Form 760 screen.

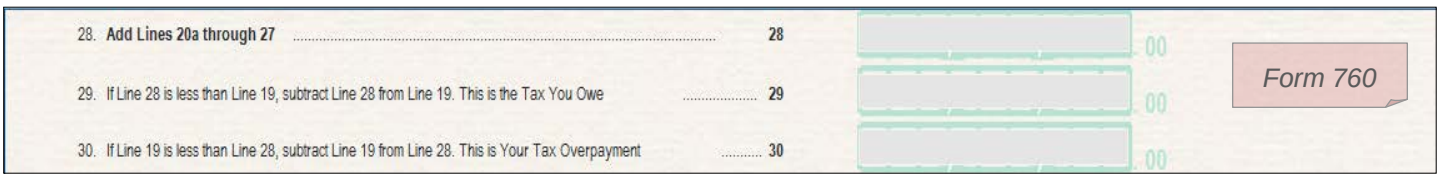


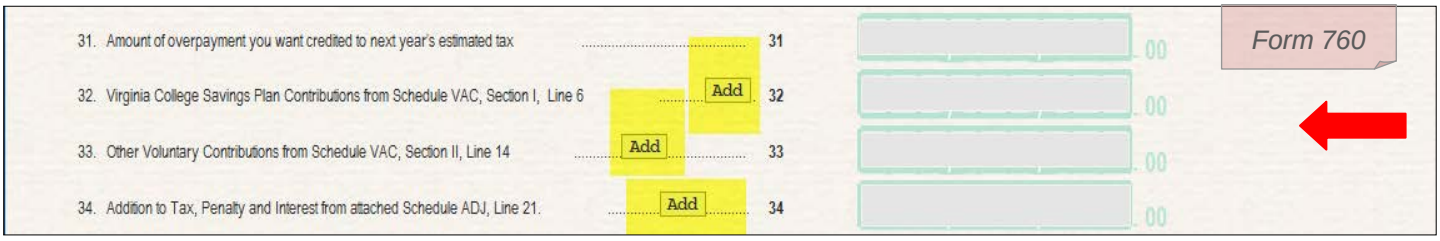
33. Continue working through the Virginia Resident return (Form 760).

34. <u>If you qualify for credits to report on Line 27 (Other Credits)</u>,
    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.
    A. Click the "Add" button next to Line 27.
    B. Scroll down and complete the related Virginia Schedule CR section(s).
    C. <u>If the amount is $0</u>, do not put $0 in Line 27 of Form 760 or in related Schedule CR section(s).
    D. Click the "Done With This Form" button to display the Form 760 screen.

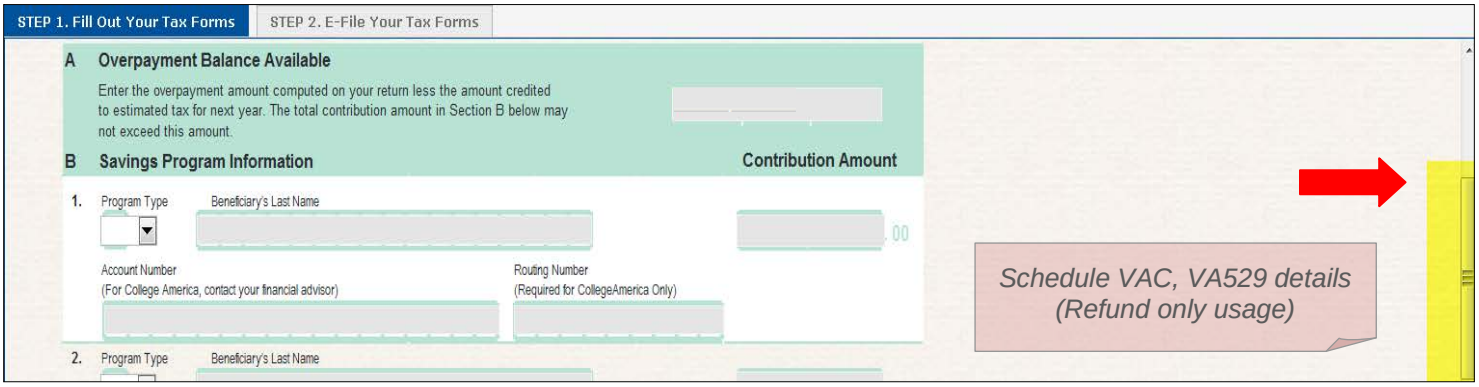
35. Click the "Do the Math" button to ensure information entered so far is updated.

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

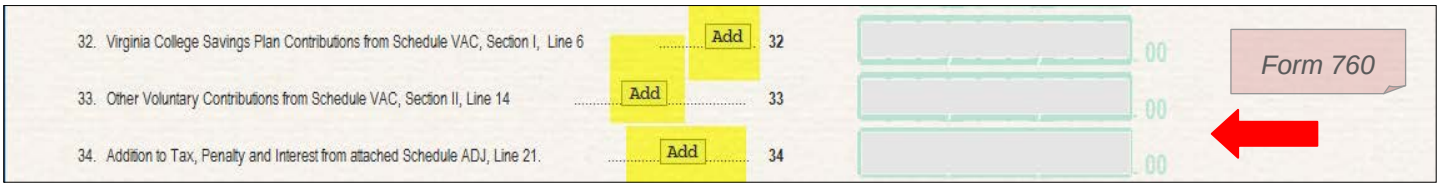




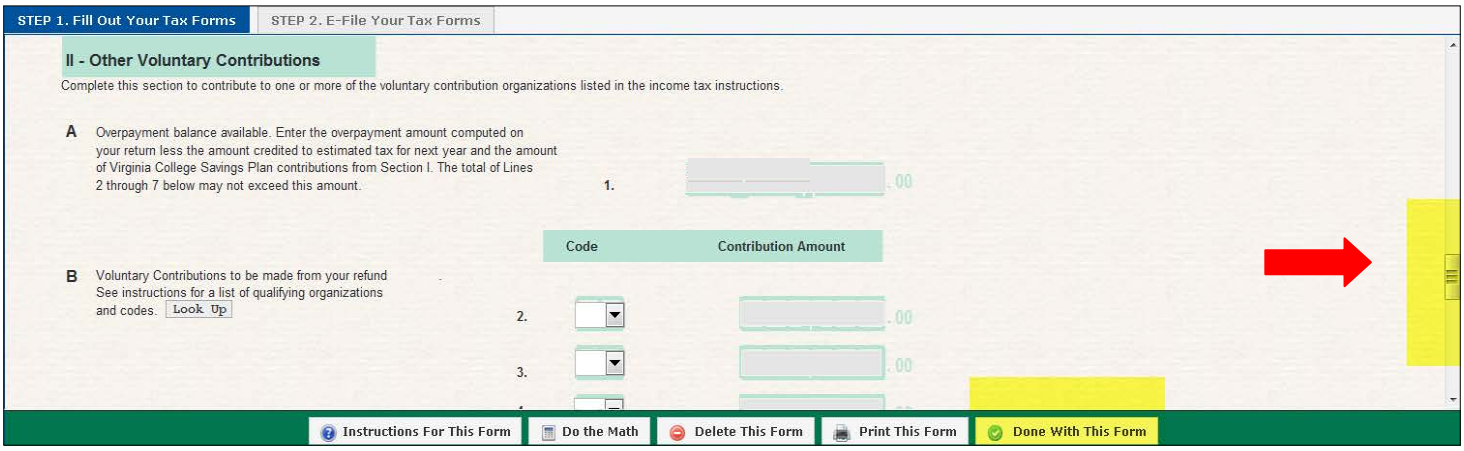
37. <u>If you have an amount to report (other than $0) on Line 32 (Virginia College Savings Plan Contributions)</u>,
    A. Click the "Add" button next to Line 32.
    B. Scroll down and complete the Virginia Contributions Schedule VAC Section I labeled "Virginia College Savings Plan (Virginia529) Contributions".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

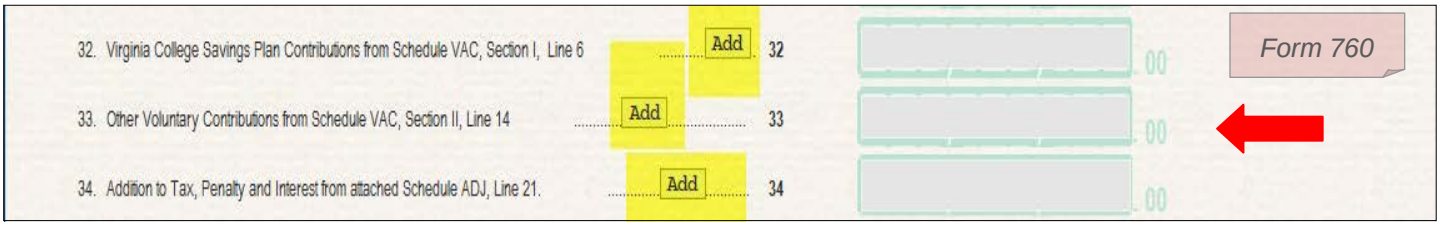


38. Click the "Do the Math" button to ensure information entered so far is updated.

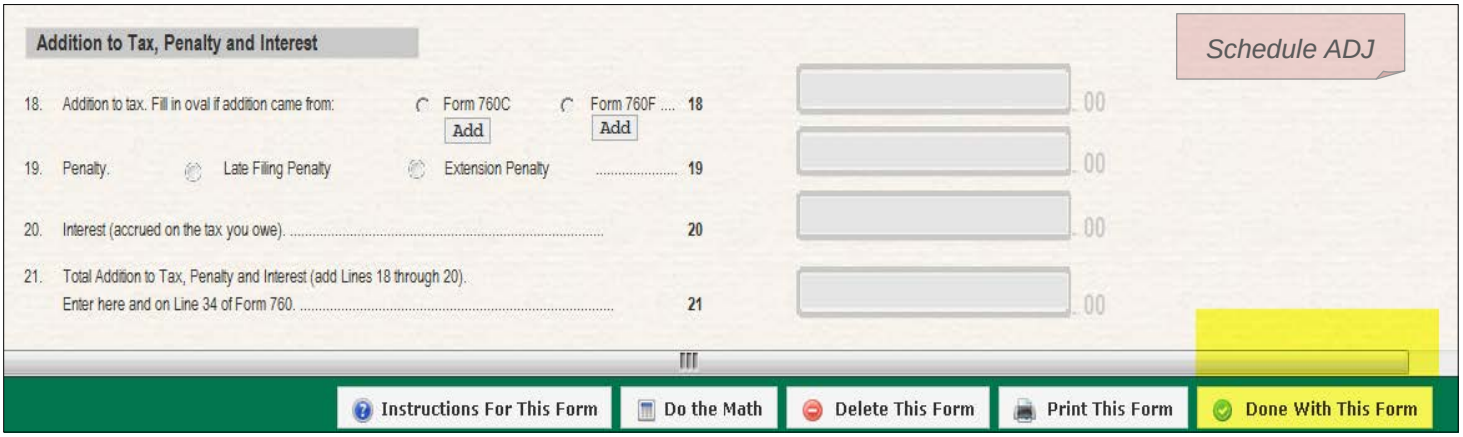


39. <u>If you have an amount to report (other than $0) on Line 33 (Other Voluntary Contributions)</u>,
    A. Click the "Add" button next to Line 33.
    B. Scroll down and complete the Virginia Contributions Schedule VAC Section II labeled "Other Voluntary Contributions".
    C. <u>If the amount is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

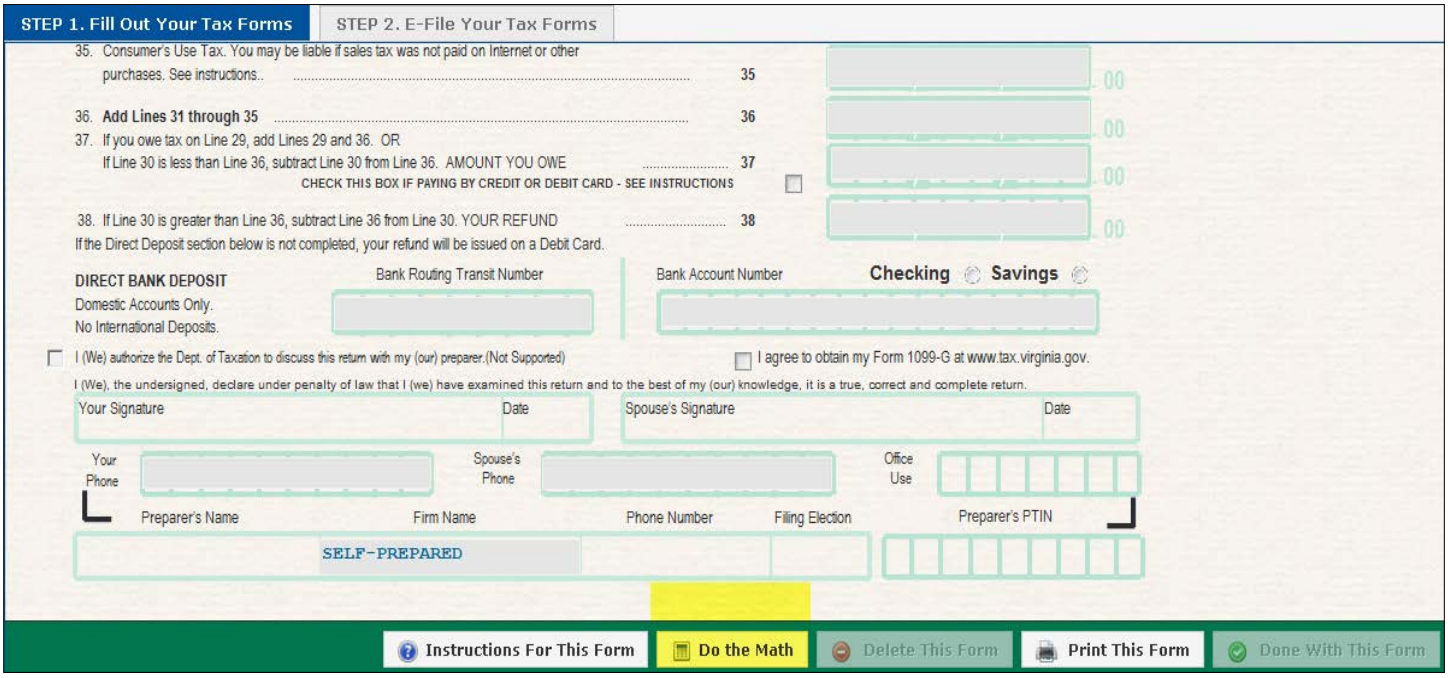




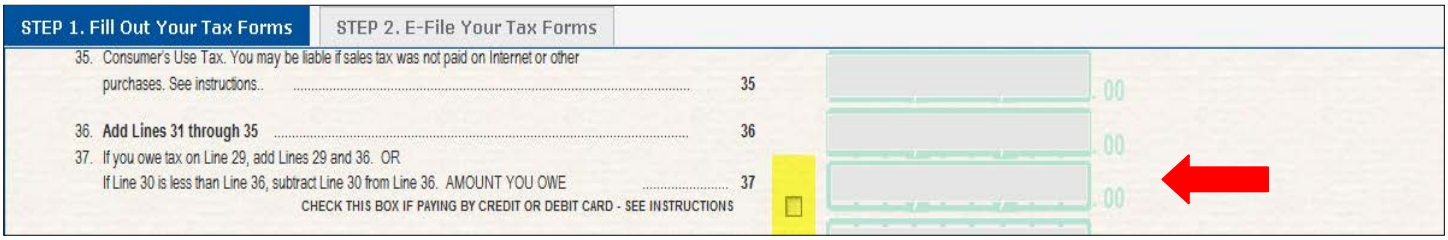
40. <u>If you have an amount to report (other than $0) on Line 34 (Addition to Tax, Penalty and Interest)</u>,
    A. Click the "Add" button next to Line 34.
    B. Scroll down and complete the Virginia Schedule ADJ section labeled "Credit for Low-Income Individuals or Virginia Earned Income Credit".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



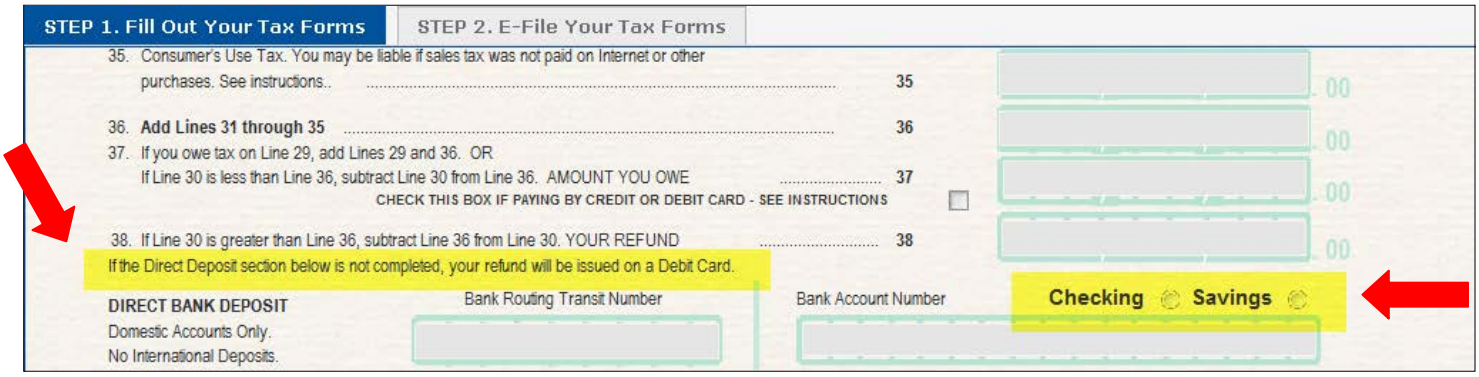
41. Continue working through the Virginia Resident return (Form 760).



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

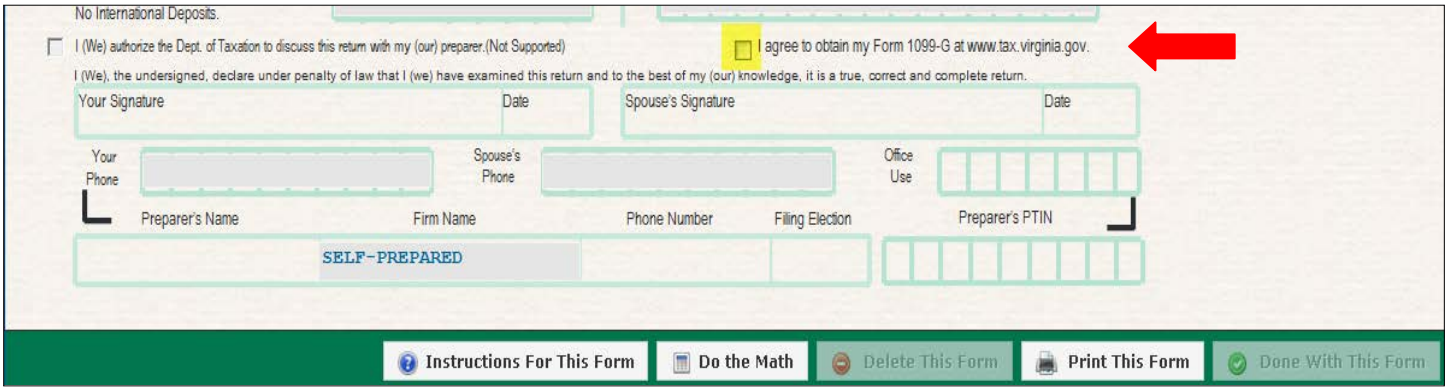


43. <u>If you have a tax due amount on Line 37</u>,
    A. <u>If you plan to pay or have already paid by credit card,</u> check the Credit Card Checkbox.
    B. <u>If you want the Department to electronically withdraw the funds from your bank account</u>, you will enter your detailed banking information for the payment later in "STEP 2".



44. <u>If you have a refund amount on Line 38</u>,
    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. <u>If you wish to obtain your 1099-G electronically from the Department's website</u>, check the "1099-G" checkbox



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.

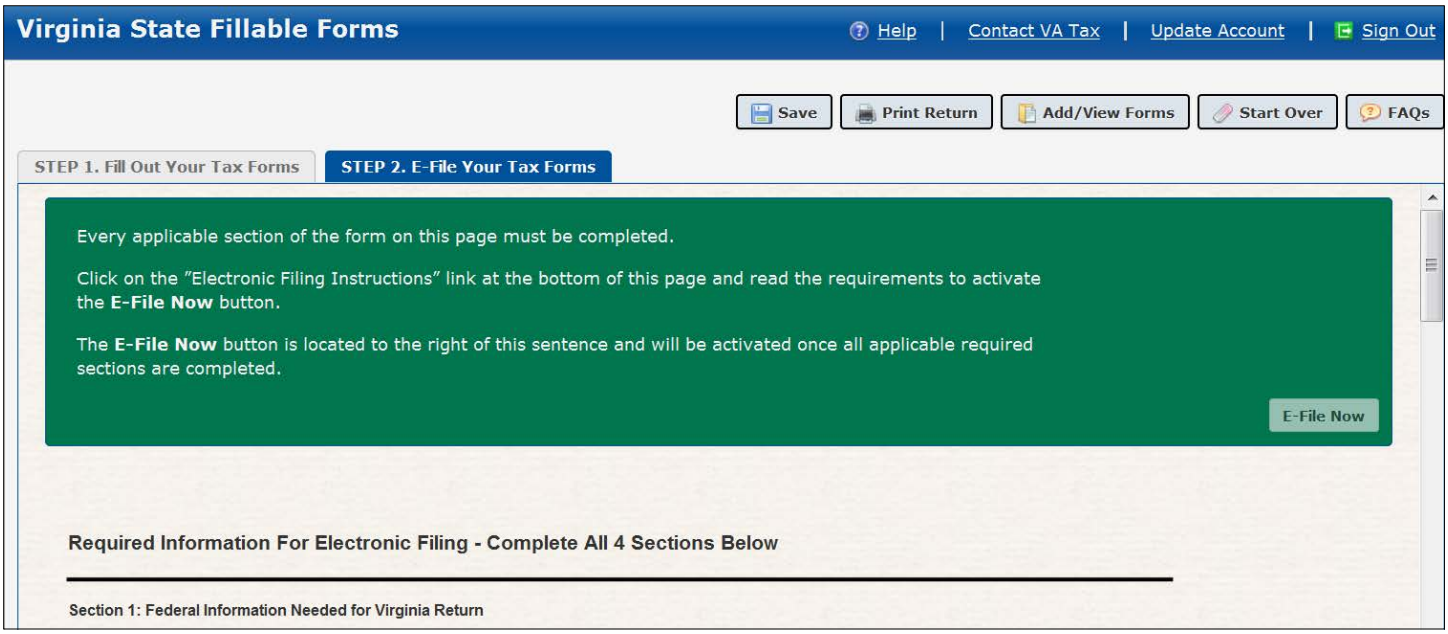
Preparing & e-Filing Your Form 760 – “STEP 2” Tab

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



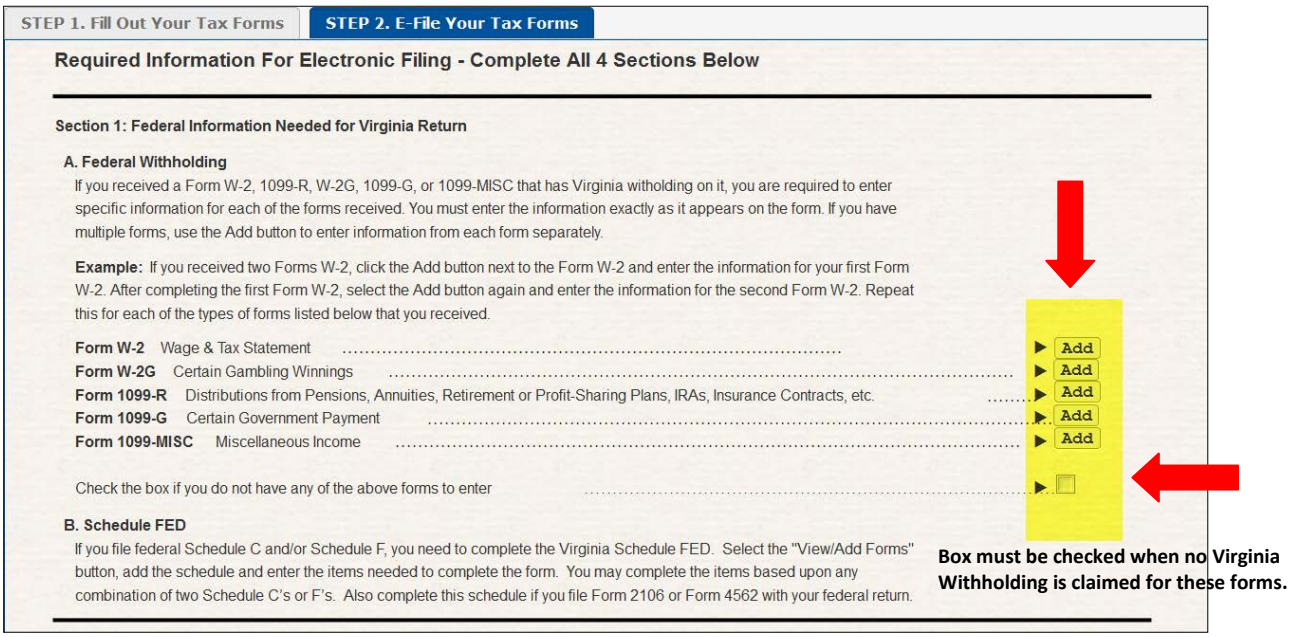
Required Information in the “STEP 2” Tab

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

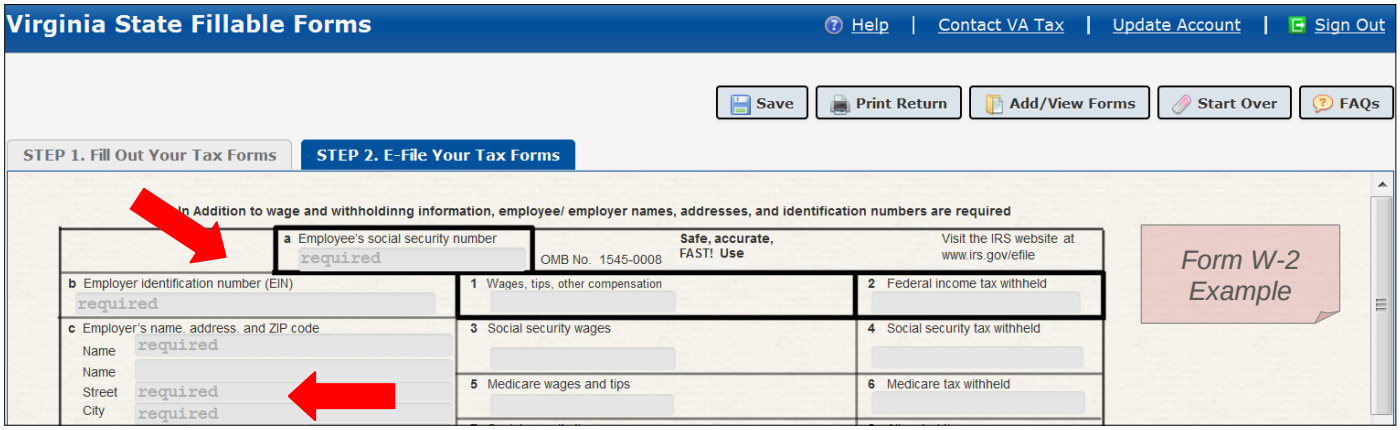
- Virginia Withholding information in Section 1
- Taxpayer’s 5-digit Electronic Signature Pin in Section 2.
- Spouse’s 5-digit Electronic Signature Pin in Section 2 (for filing status Married Filing Jointly).
- Email Address and Re-entered e-mail address in Section 3.

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

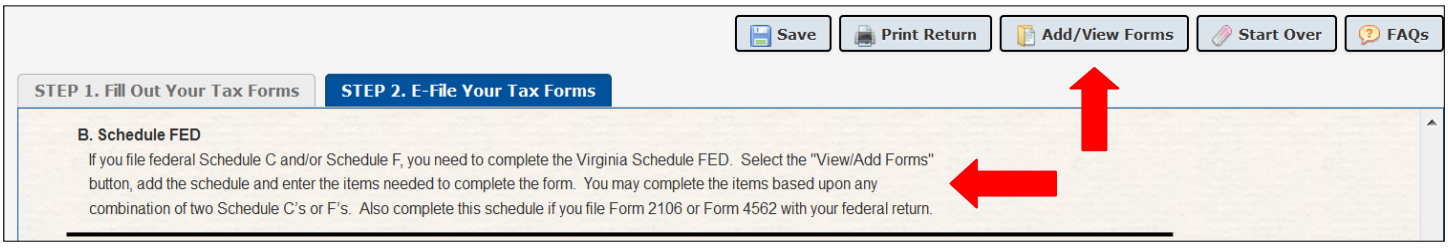
1. Begin reviewing the 1st section of the "STEP 2" Tab.



2. <u>If you claimed Virginia Withholding (Lines 20a / 20b, Form 760)</u>,
   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.



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



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

5. 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.

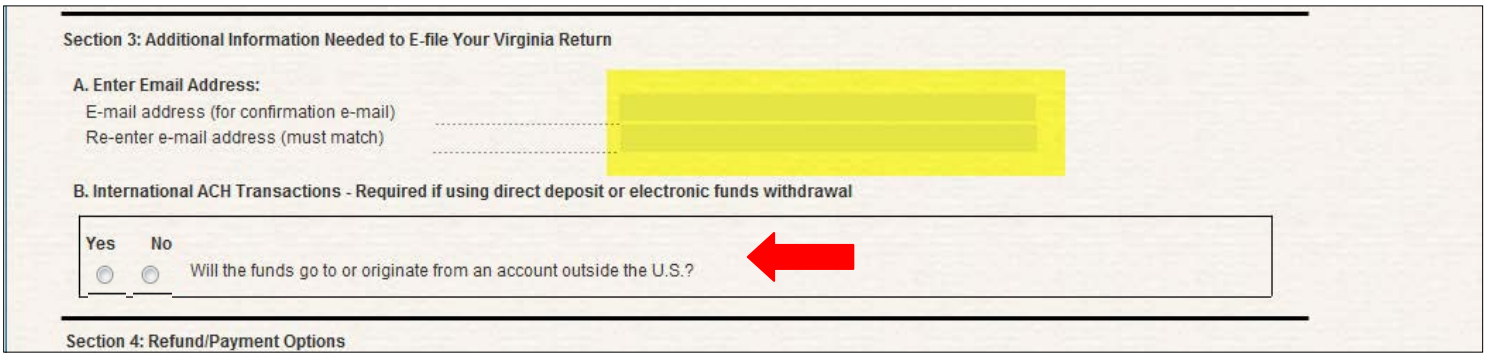
6. Enter a 5-digit PIN to serve as your electronic signature on the Fillable Forms return.
   NOTE: It is recommended to keep a copy of your PIN with your tax records.

7. <u>If the filing status is Married Filing Jointly</u>, enter a 5-digit PIN in the Spouse field.

8. 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.

9. Enter a valid email address to receive your Fillable Forms confirmation email.

10. Enter the same valid email address again to ensure it matches the first



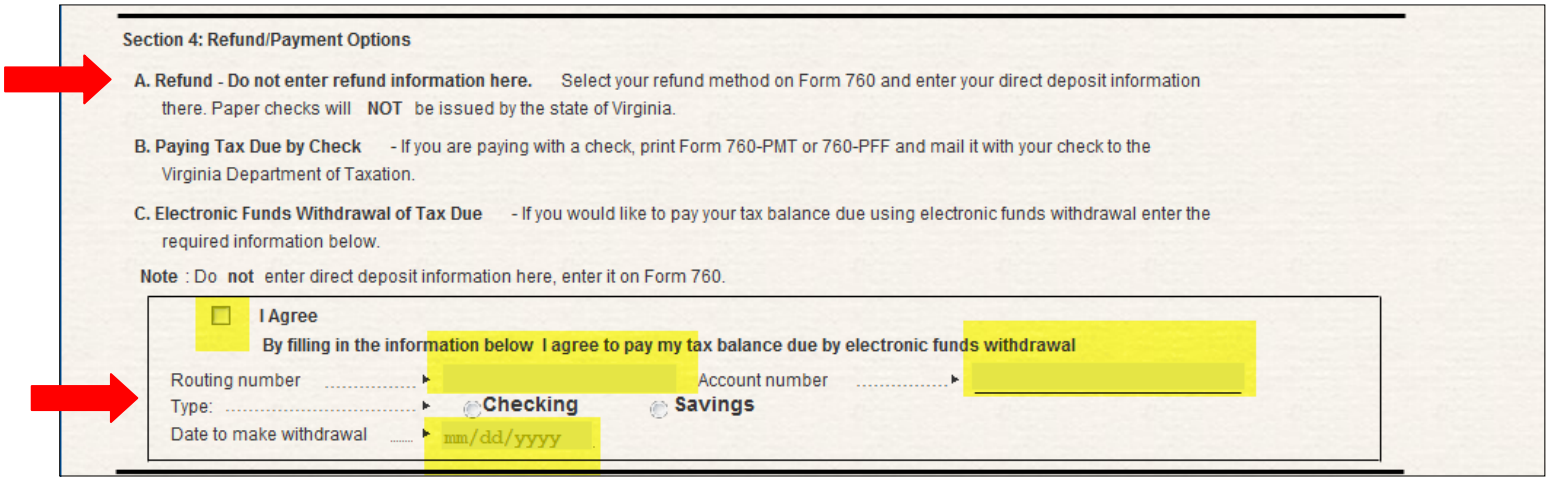
11. Answer the "International ACH Transactions" question.
    NOTE: This applies if you have a refund that uses Direct Deposit or a tax due payment due you want withdrawn electronically by the Tax Department.

<u>International ACH Transactions</u>

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.

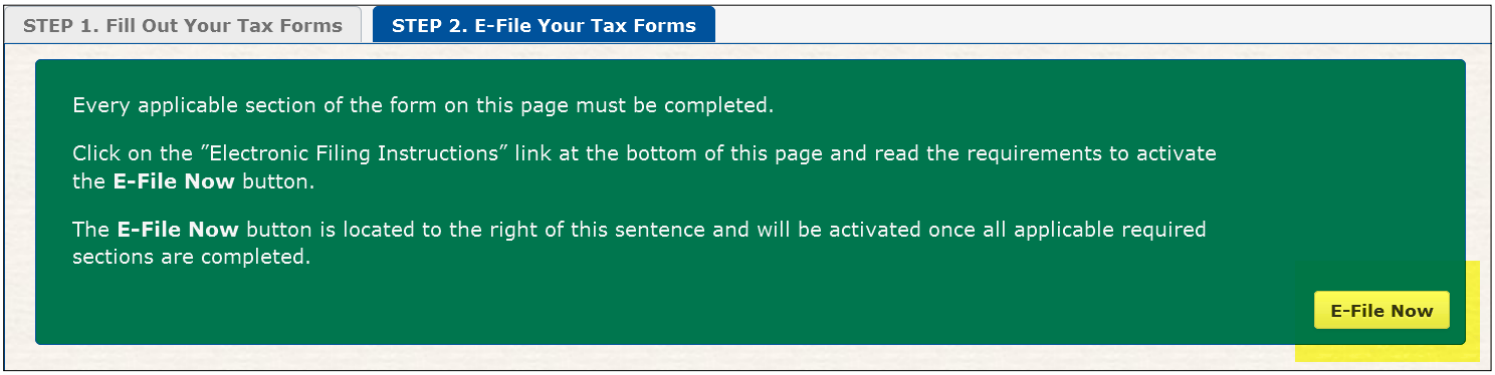
12. Begin reviewing the 4th section of the "STEP 2" Tab.
    NOTE: This does not apply to taxpayers who must print and mail their return (with a tax due payment) to the Tax Department.



13. <u>If you owed a tax due amount (Line 37, Form 760)</u>, review your payment options.
    A. <u>If you are paying by check</u>,
        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. <u>If you want the Tax Department to withdrawn the funds electronically</u>,
        1. Check the "electronic funds withdrawal agreement" checkbox under Section 4, Part C.
        2. Continue to Step 14 to provide the required banking information.

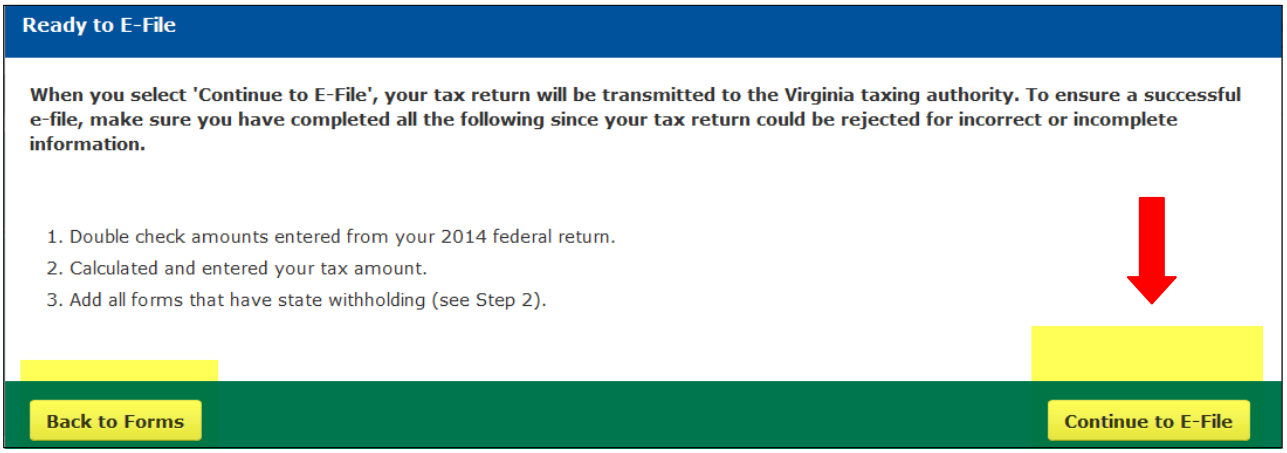
14. Provide the banking information.
    NOTE: Taxpayers must not enter bank information in Section 4 if the return is a refund return.
    A. Enter your Routing Number and your Account Number.
    B. Select the Type of Account – Checking or Savings.
       NOTE: Forgetting to select the Type of Account 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.



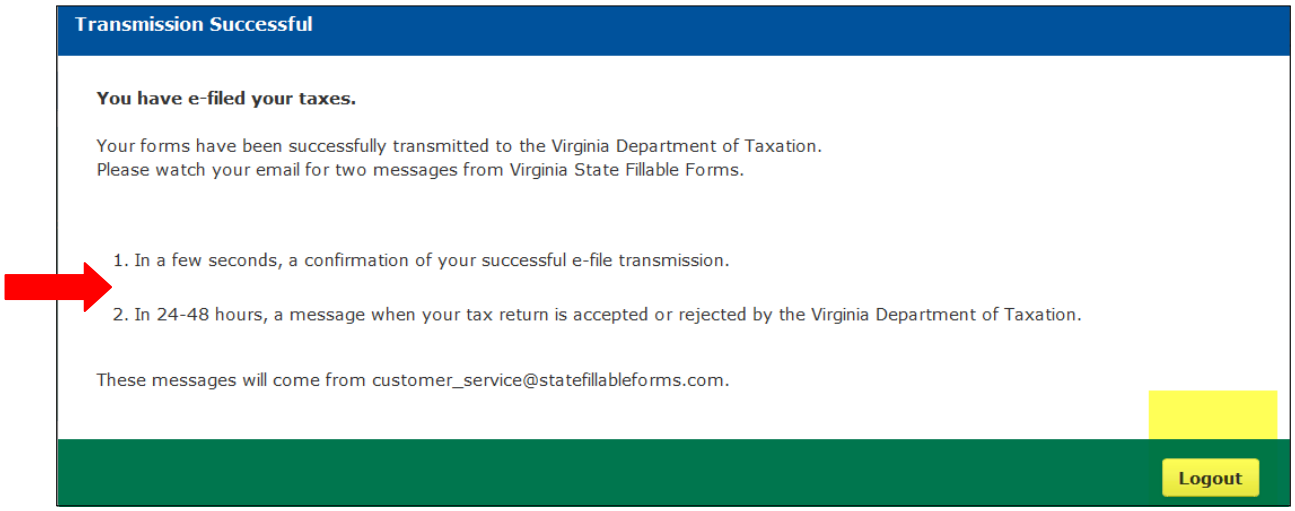
After “e-File Now” is Clicked

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

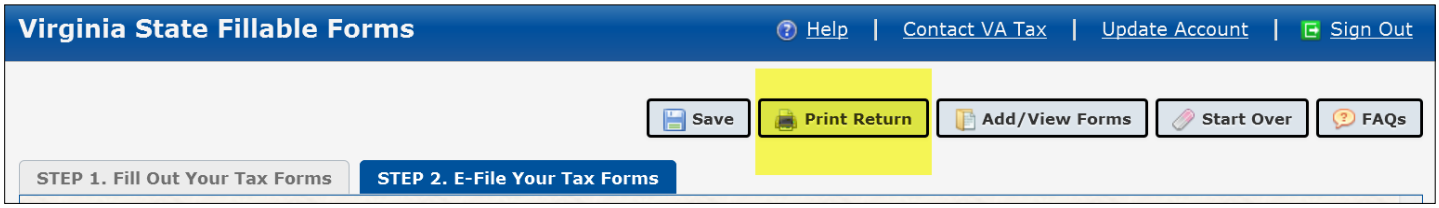


1. <u>If you need to review your return again</u>, click the “Back to Forms” button.
   NOTE: Your return will not be filed until you complete the e-File Now steps.

2. <u>If you want to submit your return to the Tax Department</u>, click the “Continue to E-File” button.



3. Click the “Logout” button.

4. <u>If you want to print a copy of your filed return</u>, click the “Start Fillable Forms” button to access your filed return.

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.