

Virginia Tax Free Fillable Forms Quick Reference Guide

How to Avoid a Rejected Return

To avoid a rejected return, ensure that at a minimum the highlighted fields on subsequent pages contain valid, correct data. Additionally, use the speech bubbles to correct information and /or complete missing information.

To avoid the most common reasons for a rejected return, ensure the following:

1. If entering withholding information, such as from a Form W-2, enter exactly what appears on the form. For example, do not include foreign address information if the address is domestic.
2. Only enter an ID Theft PIN if you received one in the mail from Virginia Tax. Otherwise, leave this field blank.
3. If you provide optional driver's license information, this must be done in both Step 1 and Step 2. That is, you must provide complete information on the top of Form 760 as well as in Step 2, Section 4.
4. You must claim either the standard deduction or itemized deductions on Lines 10 and 11 of Form 760. You must claim the same type of deduction that was claimed on your federal return.

Virginia Free Fillable Forms – W-2 Statement

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

a Employee's social security number
required

Safe, accurate, FAST! Use Visit the IRS website at www.irs.gov/efile

b Employer identification number (EIN)
required

1 Wages, tips, other compensation

2 Federal income tax withheld

c Employer's name, address, and ZIP code
 Name required
 Name
 Street required
 City required
 State ▼ ZIP code
 Foreign Province
 Foreign Postal Code
 Foreign Country ▼

3 Social security wages

4 Social security tax withheld

d Control number

5 Medicare wages and tips

6 Medicare tax withheld

e Employee's first name, initial, last name and suffix
 First required M.I.
 Last required Suff.

7 Social security tips

8 Allocated tips

f Employee's address and ZIP code
 Street required
 City required
 State ▼ ZIP Code
 Foreign Province
 Foreign Postal Code
 Foreign Country ▼

9

10 Dependent care benefits

15 State
▼

16 State wages, tips, etc.

17 State income tax

18 Local wages, tips, etc.

19 Local income tax

20 Locality name

Form W-2
 Copy B — To Be Filed With Your Federal Tax Return.
 This information is being furnished to the Internal Revenue Service.

At a minimum, complete as much of the highlighted fields as possible from your W-2 statement.

DO NOT enter Foreign Address information if the address is domestic.

Ensure 'VA' is selected if wages were earned in Virginia.

Line 17 is the total Virginia tax that was withheld by your employer. This should be included in the total on Form 760 Lines 19a or 19b.

Virginia Free Fillable Forms – Form 760, Page 1

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

2020 Virginia Resident Form 760

Individual Income Tax Return

File by May 1, 2021 — PLEASE USE BLACK INK

2601031 Rev. 6/20

Your first name M.I. Last name

Spouse's first name (joint returns only) M.I. Last name including suffix

Number and Street - If this is a change, you must fill in oval ☐

City, town, or post office State ZIP Code

Social Security Number

Birth Date (mm-dd-yyyy) Deceased ☐

Locality Code **Look Up**

Fill in all ovals that apply:

☐ Name or Filing Status changed ☐ Overseas on due date

☐ Entering Driver's License information is optional. However, if you choose to provide this information you must also complete **STEP 2, Section 4.**

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

☐ Federal head of household? Filing status 1 only ☐ YES ☐ NO

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

VA Driver's License Information

Customer ID Issue Date

Spouse

Exemptions Add Sections A and B. Enter the sum on Line 12.

You	Spouse if Filing Status 2	Dependents	=	<input type="text"/>	X \$930 =	<input type="text"/>
You 65 or over	Spouse 65 or over	You Blind	Spouse Blind	=	X \$800 =	<input type="text"/>

Line 9 and Instructions

1. Total taxable income

2. **Add**

3.

4.

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

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

7. Subtractions from enclosed Schedule ADJ, Line 7

8. **Add** Lines 4, 5, 6 and 7

9. **Virginia Adjusted Gross Income (VAGI)** - Subtract Line 8 from Line 3. Enter the result on this line.

Note: If less than \$11,950 for Filing Status 1 or 3; or \$23,900 for Filing Status 2, your tax is \$0.00

10. Itemized Deductions from Virginia Schedule A. See instructions.

11. If you do not claim itemized deductions on Line 10, enter standard deduction. See instructions.

You must claim either itemized deductions on Line 10 or the standard deduction on Line 11. You must claim the same type of deduction that you claimed on your federal return.

If claiming itemized deductions, click **Add** on Line 10 and complete VA Schedule A.

If you claim the standard deduction do **not** enter an amount on Line 10. Skip to Line 11 and enter your standard deduction amount.

Virginia Free Fillable Forms – Form 760, Page 2

STEP 1. Fill Out Your Tax Forms		STEP 2. E-File Your Tax Forms	
Page 2 2020 Form 760		Your SSN 	
16. Amount of Tax from Tax Table or Tax Rate Schedule (round to whole dollars)	Look Up 16	.00	
17. Spouse Tax Adjustment (STA). Filing Status 2 only. Enter Spouse's VAGI in box here and STA amount on Line 17.		.00 17	.00
18. Net Amount of Tax - Subtract Line 17 from Line 16		18	.00
<div style="border: 2px solid red; padding: 5px; margin-bottom: 5px;"> If you <u>are not</u> claiming the Spouse Tax Adjustment <u>do not</u> enter zero values. Leave both fields blank. </div> <div style="border: 2px solid red; padding: 5px;"> If you <u>are</u> claiming the Spouse Tax Adjustment you must enter both your spouse's Virginia AGI and the STA amount. </div>		19a	.00
		19b	.00
20.		20	.00
21. Enter the correct totals for how much tax you (or your spouse) withheld. Your returns will be rejected if these totals don't equal the total Virginia withholding on your W-2s / 1099s.		21	.00
22.		22	.00
23. Example: If you are a single filer and you have two W-2s, add up the amounts on Line 17 of your W-2s and put the total here, on Line 19a.		Add 23	.00
24. Example: If you are a joint filer and you have a W-2 and your spouse has a 1099-R, enter the amount from Line 17 of your W-2 here, on Line 19a. Enter the amount from Line 12 of your 1099-R here, on Line 19b.		Add 24	.00
25.		Add 25	.00
26. Add Lines 19a through 25		26	.00
27. If Line 26 is less than Line 18, subtract Line 26 from Line 18. This is the Tax You Owe		27	.00
28. If Line 18 is less than Line 26, subtract Line 18 from Line 26. This is Your Tax Overpayment		28	0 .00
29. Amount of overpayment you want credited to next year's estimated tax		29	.00
30. Virginia529 and ABLEnow Contributions from Schedule VAC, Section I, Line 6		Add 30	.00
31. Other Voluntary Contributions from Schedule VAC, Section II, Line 14		Add 31	.00
32. Addition to Tax, Penalty, and Interest from enclosed Schedule ADJ, Line 21.		Add 32	.00
33. Sales and Use Tax is due on Internet, mail order, and out-of-state purchases (Consumer's Use Tax). See instructions.		33	.00
FILL IN OVAL IF NO SALES AND USE TAX IS DUE.			
34. Add Lines 29 through 33		34	.00
35. If you owe tax on Line 27, add Lines 27 and 34. OR If Line 28 is		AMOUNT YOU OWE 35	.00
<div style="border: 2px solid red; padding: 5px; margin-bottom: 5px;"> If you have a refund: 1. Mark Checking or Savings. 2. Enter the Routing Number. 3. Enter the Account Number. </div>		<div style="border: 2px solid red; padding: 5px; margin-bottom: 5px;"> Mark the oval if you don't owe Sales and Use Tax. </div>	
		36	0 .00
Domestic Accounts Only. <input type="radio"/> Checking <input type="radio"/> Savings No International Deposits.			
I (We) authorize the Dept. of Taxation to discuss this return with my (our) preparer. <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	
Your Phone 		Spouse's Phone 	
Preparer's Name		Preparer's PTIN	
Firm Name		Phone Number	
Filing Election		Preparer's PTIN	
SELF-PREPARED			

Virginia Free Fillable Forms – Schedule ADJ

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

2020 Virginia Schedule ADJ (Form 760-ADJ)

Name(s) as shown on Virginia return

Additions to Federal Adjusted Gross Income

1. Interest on obligations of other states, exempt from federal income tax. 1

2. Other additions to federal adjusted gross income.

2a. FIXED DATE CONFORMITY ADDITION - SEE INSTRUCTIONS. 2a

2b - 2c. Refer to the Form 760 instructions for Other Addition Codes.

Code

2b ▼

2c ▼

Dollar Amount

1 .00

2a .00

2b .00

2c .00

3 .00

3. Total Additions. Add Lines 1 and 2a - 2c. Enter here and on Form 760, Line 2.

Subtractions from Federal Adjusted Gross Income

4. Income (interest, dividends, or gains) from obligations or securities of the U.S. exempt from federal income tax but not from federal tax. 4

5a. Disability subtraction. 5a

5b. Disability subtraction. 5b

6a - 6d. Refer to the Form 760 instructions for Other Subtraction Codes.

Certification number

6b

6c

6d

Code

6b ▼

6c ▼

6d ▼

7 .00

7. Total Subtractions. Add Lines 4, 5a, 5b, and 6a - 6d. Enter here and on Form 760, Line 7.

Deductions from Virginia Adjusted Gross Income

8. Refer to the Form 760 instructions for Deduction Codes.

8a ▼ .00

Do not enter 0 values in the Amount fields if you aren't claiming anything.

A Code must be selected if you enter an amount.

Do not enter a certification number unless you are claiming Code 56 or 57.

Do not enter 0 values in the Amount fields if you aren't claiming anything.

A Code must be selected if you enter an amount.

Virginia Free Fillable Forms Quick Reference Guide – How to Avoid Rejects

Virginia Free Fillable Forms – Schedule VAC, Page 1

STEP 1. Fill Out Your Tax Forms

STEP 2. E-File Your Tax Forms

Program Type Codes: 1 = INVEST529 SM 3 = CollegeWealth [®] 5 = ABLEnow SM
 2 = Prepaid529 SM 4 = CollegeAmerica [®]

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.

0.00

B Savings Program Information

1. ▼ Program Type Beneficiary's Last Name

Account Number
(For College America [®], contact your financial advisor)

Routing Number
(Required for CollegeAmerica [®] Only)

Contribution Amount

0.00

Part 1 of Schedule VAC can only be used if there is an overpayment amount on this line.

2. ▼ Program Type Beneficiary's Last Name

Account Number
(For College America [®], contact your financial advisor)

Routing Number
(Required for CollegeAmerica [®] Only)

Enter a Routing Number only when **Program Type 4 (CollegeAmerica)** is being claimed.

3. ▼ Program Type Beneficiary's Last Name

Account Number
(For College America [®], contact your financial advisor)

Routing Number
(Required for CollegeAmerica [®] Only)

4. ▼ Program Type Beneficiary's Last Name

Account Number
(For College America [®], contact your financial advisor)

Routing Number
(Required for CollegeAmerica [®] Only)

5. ▼ Program Type Beneficiary's Last Name

Account Number
(For College America [®], contact your financial advisor)

Routing Number
(Required for CollegeAmerica [®] Only)

If you need to enter more than 5 contributions then **mark** the oval and then click **Add** to produce Schedule VACS.

6. **Total Amount.** Enter the total contribution amount for all Virginia529 accounts here and on Form 760, Line 30; Form 760PY, Line 30; or Form 763, Line 30. If contributing to more than 5 accounts, use the supplemental Schedule VACS Add and fill in this oval.

0.00

Virginia Free Fillable Forms – Schedule VAC, Page 2

STEP 1. Fill Out Your Tax Forms	STEP 2. E-File Your Tax Forms	
<div style="display: flex; justify-content: space-between;"> <div> 2020 Schedule VAC Page 2 </div> <div> Virginia Contributions Schedule </div> </div>		
<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> Name(s) as shown on Virginia return </div>		<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px; text-align: center;"> Your SSN </div>
<div style="background-color: #e0f2f1; padding: 10px; display: inline-block;"> II - Other Voluntary Contributions </div>		
<p>Complete this section to contribute to one or more of the voluntary contribution organizations listed in the income tax instructions.</p>		
<div style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> 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 529SM and ABLEnowSM contributions from Section I. The total of Lines 2 through 7 below may not exceed this amount. </div>		
1.	0	.00
<div style="display: flex; justify-content: space-between;"> <div> B Voluntary Contributions to be made from your refund. See instructions for a list of qualifying organizations and codes. </div> <div> <div style="background-color: #e0f2f1; padding: 2px 5px; font-weight: bold;">Code</div> <div style="background-color: #e0f2f1; padding: 2px 5px; font-weight: bold;">Contribution Amount</div> </div> </div>		
2.	▼	.00
3.	▼	.00
4.	▼	.00
5.	Look Up	.00
6.		.00
7.		.00
<div style="display: flex; justify-content: space-between;"> <div> C Voluntary Contributions to be made from your refund or tax payment. See instructions for details. </div> <div> <div style="background-color: #e0f2f1; padding: 2px 5px; font-weight: bold;">Code</div> <div style="background-color: #e0f2f1; padding: 2px 5px; font-weight: bold;">Contribution Amount</div> </div> </div>		
8.	▼	.00
9.	▼	.00
10.	▼	.00
11.	Look Up	.00
12.		.00

Section B Lines 2 - 7 must only be used if there is a remaining overpayment balance available (on Line 1).

Section C Lines 8 - 13 may be used when there is a remaining overpayment balance available (on Line 1) **or** when there is a tax due.

Virginia Free Fillable Forms – STEP 2

STEP 1. Fill Out Your Tax Forms

STEP 2. E-File Your Tax Forms

Add your W-2, 1099, and/or W-2G information

Fill out the next five sections in order to complete your Virginia return. Once you're finished with these sections, you can click the **Continue to E-File** button shown below to electronically file your taxes.

For more information, click the [Electronic Filing Instructions](#) link at the bottom of the page.

Section 1: Add W-2, W-2G, 1099 tax form and Schedule FED

If you received Form(s) W-2s, 1099s, or Schedule FED that has Virginia withholding on it, you are required to enter all 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, click 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.

Click the Add button for each Form W-2 you received

Click the Add button for each Form W-2G you received

Click the Add button for each Form 1099-R you received

Click the Add button for each Form 1099-G you received

Click the Add button for each Form 1099-MISC you received

Click the Add button for each Form 1099-INT you received

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

Add

Add

Add

Add

Add

Add



Click **Add** if you need to add any other withholding forms you received.

If you don't have any of these forms, then mark the checkbox

Schedule FED

If you file federal Schedule C and/or Schedule F, you need to complete the Virginia Schedule FED. click the "Add/View 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.

Section 2: Add your electronic signature

To sign your return electronically, add a 5-digit PIN. If you are filing jointly with your spouse, you will each need to add your own PIN.

A. You can choose any 5 numbers for your PIN.(Don't use 00000 or 12345)

Taxpayer

Spouse (if filing jointly)

Section 3: Refund/Payment options

A. International ACH Transactions - Required if using direct deposit or electronic funds withdrawal

Yes



No



Will the funds go to or originate from an account outside the U.S.?

B. Refund

You can select to receive your refund by Direct Deposit or Paper Check. If using Direct Deposit enter your banking information directly on Form 760.

C. Pay tax due by check

Fill out and print Form 760-PMT or 760-PFF. Mail it with your check to the VA Department of Taxation, PO Box 1478, Richmond, VA 23218-1478. Write your social security number and "2019 VA Income Tax" on your payment.

Virginia Free Fillable Forms – STEP 2 (cont'd)

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

F. Pay tax due by electronic withdrawal through E-file when filing your return
 If you select to pay your tax balance due using electronic funds withdrawal, enter the following required information below.

Routing number

Account number

Type
 Checking ☐
 Savings ☐

Date to make withdrawal

By filling in the information above I agree to pay my tax balance due by

☐ I agree to pay by electronic withdrawal

Only complete this section if you have a **tax due.**

1. Enter your Routing and Account Numbers.
2. Select Checking or Savings.
3. Give the date for Virginia Tax to make the withdrawal. If you put a date past 05/03/2021 your return will be rejected.
4. Mark the "I agree..." checkbox

ONLY complete this section if you also entered your **Driver's License number and issue date on Form 760 in **STEP 1**.**

If you did not enter your Driver's License (or State ID) and Issue Date on Form 760 in **STEP 1** then leave all of Section 4 **BLANK**.

Section 4: Verify your identity (ID) information

Fill in the identity information that applies

A. Cell phone number

B. Type of ID

Taxpayer
▼

C. Driver's license or State issued ID state

▼

▼

D. Driver's license or State issued ID expiration date

mm/dd/yyyy

mm/dd/yyyy

E. Non-Expiring State issued ID

☐

☐

Section 5: Email address verification

E-File status updates will be sent to email: Your email address is **verified**.

Verify or change your email address in [Update Your Account](#)

You may be required to verify your email address if you haven't done so already.

Continue to E-File