Virginia Tax



Virginia Free Fillable Forms User Guide

Tax Year 2018

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Introduction

Welcome to the Virginia State Free Fillable Forms program for filing a Virginia individual income tax return.

Fillable Forms is a free web-based program made available by the Virginia Department of Taxation (Virginia Tax) through the official 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 instructions for taxpayers on how to navigate the program and to allow them to prepare their return.

Virginia State Fillable Forms

Resources

About
Available Forms
Tips for Success
Return to VA Tax



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 <u>State Free File</u> 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 supports Virginia itemized deductions on your tax return, which requires a separate Virginia Schedule A for
 the amounts you claim. If you choose to e-File your tax return with itemized deductions, Virginia Tax will send you a
 separate request for your Virginia Schedule A documentation.
- · This program does not support prior-year, part-year, non-resident or amended returns.

Start State Fillable Forms

Terms of Service

Privacy Statement





CERTIFIED Security Certification has been performed by C-Level Security

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.



Qualifications to Use Free Fillable Forms

To use Virginia's Fillable Forms, there are no limitations for income, age or location.

Anyone may use it to complete the 760 return/schedule(s). However, there are some limitations to e-file your return.

You can use Fillable Forms to complete the 760 return/schedule(s) -

BUT you must **print and mail** your return and supporting documentation to Virginia Tax if any of these situations apply.

Schedule ADJ - Claiming more than 3 additions, subtractions, deductions or contributions.

- Required = explanation to support each addition, subtraction, deduction and/or contribution used
- See the Schedule ADJ instructions for details.

Schedule OSC – Claiming credits for taxes paid to another state.

- Required = a copy of the other state tax return(s) to support each credit claimed
- See the Schedule OSC instructions for details.

Schedule CR - Claiming any of 9 credits that require mailed documentation. (See Schedule CR instructions for details.)

- Enterprise Zone Act Credit
- Conservation Tillage Equipment Credit
- Precision Fertilizer and Pesticide Application Equipment Credit
- Vehicle Emissions Testing Equipment Credit
- Foreign Source Retirement Income Tax Credit
- Waste Motor Oil Burning Equipment Credit
- Biodiesel and Green Diesel Fuels Tax Credit
- Coalfield Employment Enhancement Tax Credit and Virginia Coal Employment and Production Incentive Tax Credit
- Agricultural Best Management Practices Credit

Forms & Schedules

The Fillable Forms program supports these 2018 Virginia resident return and related schedules.

- Form 760
- Schedule ADJ
- Schedule CR
- Schedule FED
- Schedule OSC

- Schedule VAC
- Schedule VACS
- Form 760C / 760F
- Form 760-PMT
- Form 760-PFF

These wage statements are also supported: W-2, W-2G, 1099-DIV, 1099-G, 1099-INT, 1099-MISC, and 1099-R.

Getting Started

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

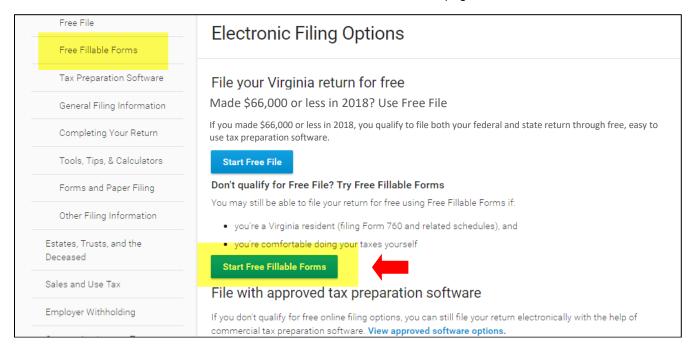
- A copy of your 2018 federal tax return
- Income and tax statements (W-2s / 1099s) you received for 2018
- Any 2018 estimated tax payment amounts
- Your routing number and account number for your checking or savings account
 NOTE: This is used for a direct deposit refund or for a direct debit withdrawal to pay taxes owed.
- Supporting documentation for Virginia Schedule A, Schedule ADJ, Schedule CR and Schedule OSC
- A valid email address to sign up / log in / receive confirmations, etc.

Access Free Fillable Forms

1. Visit the File Online page, which provides all options to e-File your Virginia individual income tax return.



2. Click the "Start Free Fillable Forms" button to view the Fillable Forms page.

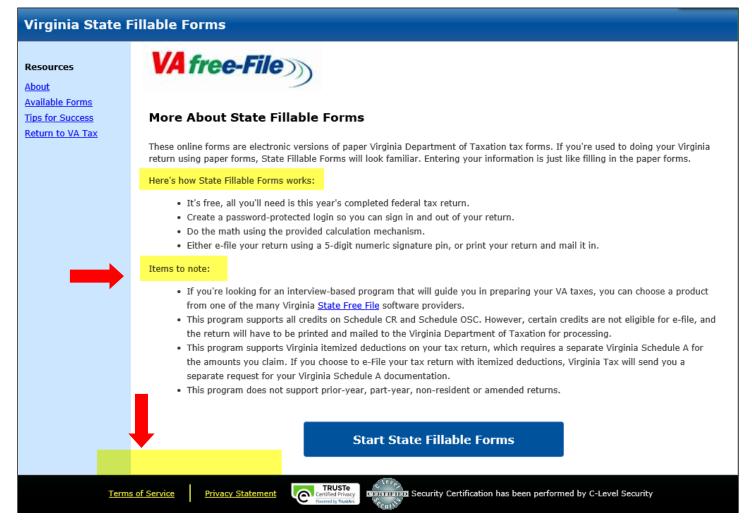


3. Read all of the Fillable Forms sections (Limitations, Other Resources, Vendor Disclaimer, etc.) **before** you click on the link to the Fillable Forms home page.

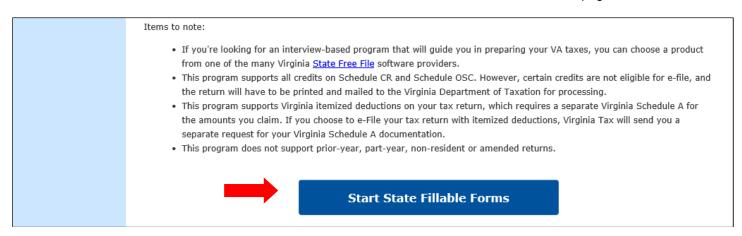
Free Fillable Forms is an electronic version of the Virginia resident return (Form 760) that does math for you, but offers only basic guidance to help you complete your return. There are no restrictions for age or income. Use Free Fillable Forms if you're: Other resources Quick Reference Guide - How to Avoid Rejects · comfortable doing your own taxes with little guidance, · a Virginia full-year resident, · Quick Reference Guide - How to Resolve Errors · preparing a current year return · Free Fillable Forms User Guide Part-year residents and nonresidents will need to use another option to prepare and file · Free Fillable Forms FAQs - more guidance, including browser limitations and Before you start, make sure you have: Disclaimer: · A copy of your current year federal tax return • All income and tax statements you received (W-2s,1099-Gs, 1099-MISCs, etc.) · Please note that by clicking on the Free Fillable Forms link, you will leave our · Any current year estimated tax payment amounts owned website created, operated and maintained by a private company. · your bank routing and account numbers if using direct deposit We recommend you review the vendor's privacy policy and terms of services information is collected by this private business and how it is used Avoid common rejects To avoid some of the most common reasons for a rejected return, make sure you provide the following

Access Free Fillable Forms (continued)

- 4. Review the information under the More About State Fillable Forms section.
 - How it Works
 - Tips for Success



- 5. Review the Privacy Statement and Terms of Service located at the bottom of the page.
- 6. Click the "Start State Fillable Forms" button to access the Welcome State Fillable Forms page.

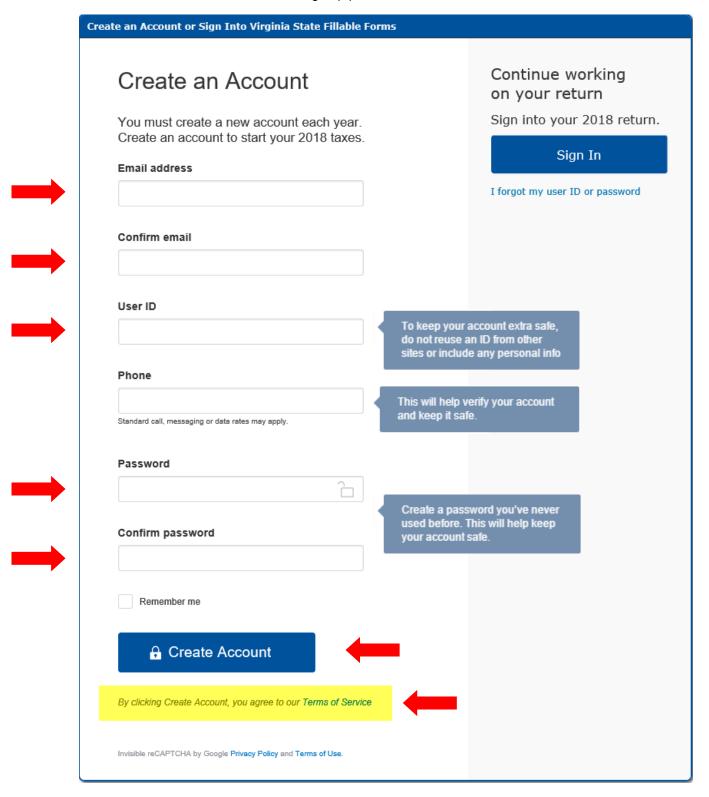


7. Continue to the next section to create an account.

Create a Free Fillable Forms Account

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

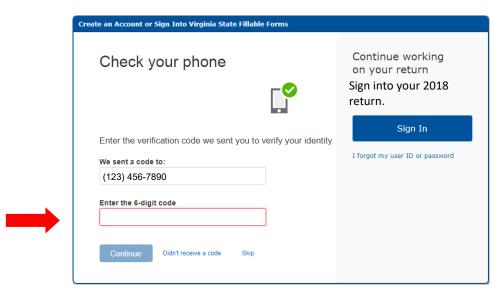
- 1. Review the field information on the Create an Account page.
- 2. Enter information in all of the required fields.
- 3. Review the Terms of Service before going to Step 4.
- 4. Click "Create Account" to continue the sign up process.



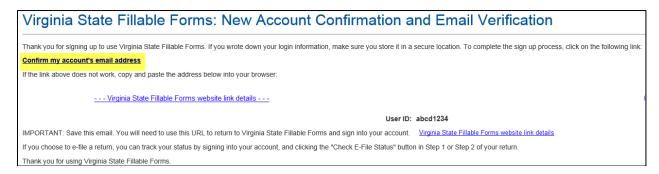
Create a Free Fillable Forms Account (continued)

After clicking "Create Account" you will use 1 of 2 options to confirm your plan to sign up and use the program.

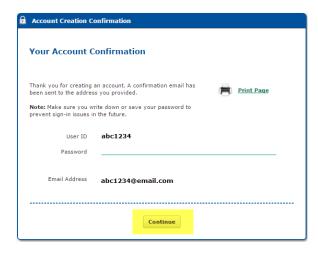
- Phone verification
- Email verification
- 5. If you entered your cell phone number for the **phone (texting) verification** option,
 - A. Enter the 6-digit code sent to your phone.
 - B. Click the "Continue" button.



- 6. If you prefer to use the email verification option,
 - A. View the email you received.
 - B. Click on the "Confirm my account's email address" link.



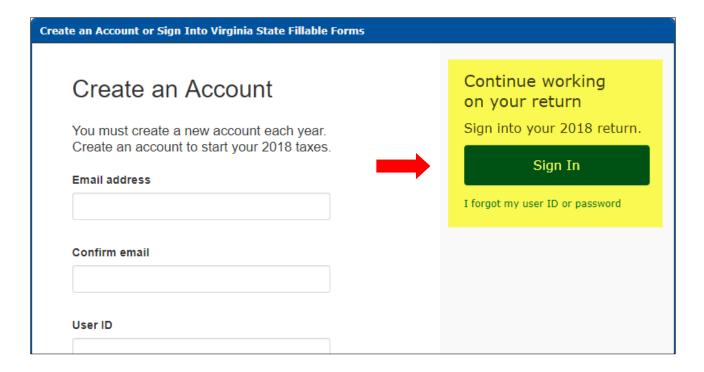
Once you complete the verification steps, an Account Creation Confirmation message will display for you.



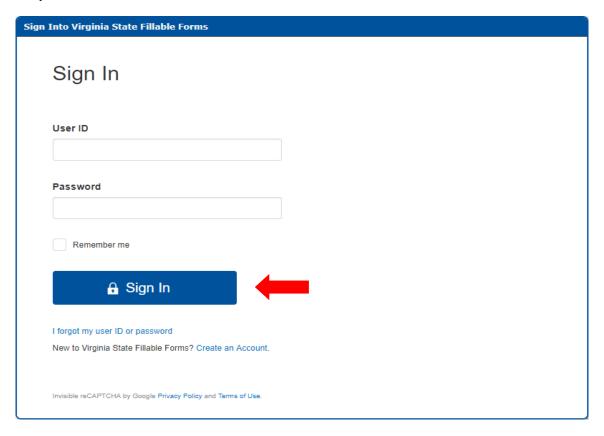
7. Click the "Continue" button to begin using the Fillable Forms program.

Returning User Sign In

A returning user should click on "Sign In" after clicking on "Start State Fillable Forms" on the Welcome Page (ex. Page 6).



1. Provide your User ID and Password.



2. Click "Sign In" to begin using the Fillable Forms program.

Tabs & Links – Navigating Fillable Forms

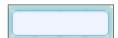
This screen is displayed after you sign in to your Fillable Forms account. In the image below, each part of the Fillable Forms screen is identified with a letter (A, B, C, etc.) that corresponds to the descriptions provided.



- A. "STEP 1" Tab Most of the return information is added here.
- B. <u>"STEP 2" Tab</u> 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. <u>Print Return</u> 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 Virginia Tax.
- E. <u>Add/View Forms</u> 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. Check E-File Status Click the button to open a new window to enter your SSN / Zip Code to check on your return.
- H. FAQs Click the link to view Virginia's Fillable Forms Frequently Asked Questions (FAQs) page.
- I. <u>Help</u> Click the link to view additional Fillable Forms FAQs with helpful information. Review these when you sign in.
- J. Contact VA Tax The link goes to Virginia's "Contact Us" page with ways to contact Virginia Tax.
- K. <u>Update Your Account</u> Click the link to update your Fillable Forms account information.
- L. Sign Out Click the button to log out. Ensure all data is saved before clicking the button.
- M. Instructions For This Form Click the button to display 760 return and related schedule instructions.
- N. <u>Do The Math</u> Simple math calculations are built into Fillable Forms. Many of these are not calculated automatically. Click the "Do the Math" button often during the process.
- O. <u>Delete This Form</u> 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.
- P. Print This Form Click the button to print the form that is currently displayed in your screen.
- Q. Done With This Form If you add a form/schedule, click the button when you are done 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
 - o 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 gray 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 "left 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 "left click" or
- Tap the touchpad on your laptop.

Radio Button



When selected for input, the radio button will have a gray circle 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.

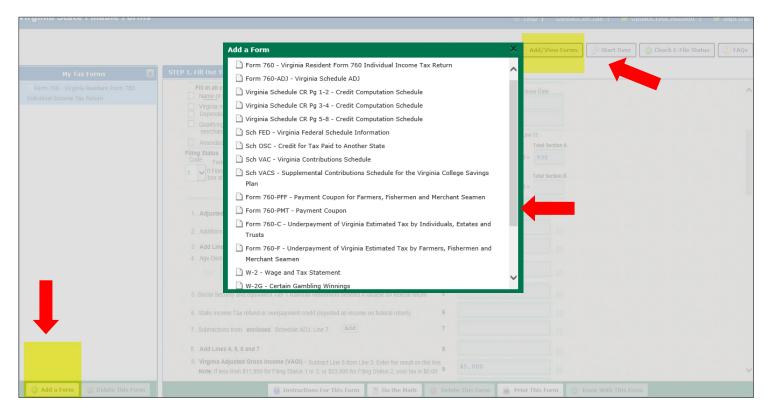
Calculated field data may always be changed by changing the data used to calculate the field and selecting the "Do the Math" button again.

Adding / Deleting Forms & Schedules

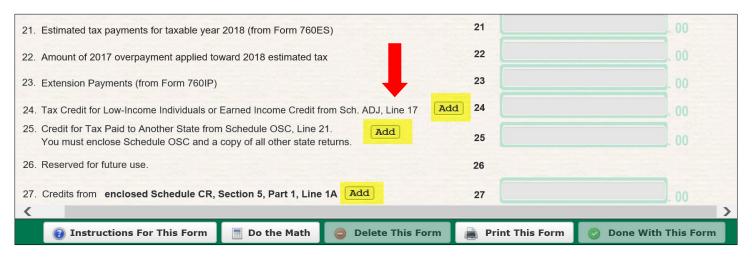
There are 2 ways to add forms and schedules to your Fillable Forms return.

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. Click the "Add/View Forms" button (upper right side of page) to open the **My Tax Forms** screen. **NOTE**: This box lists your current forms.
 - A. At the bottom of the My Tax Forms screen, 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.

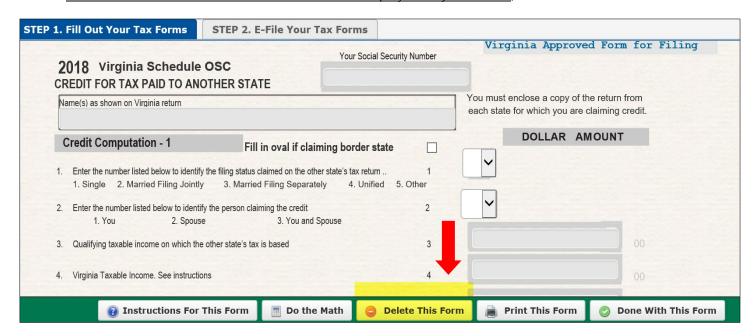


To add the same form multiple times, use either of the 2 methods described above.
 NOTE: This applies only to when you need to add more than 1 page of the Schedule OSC.

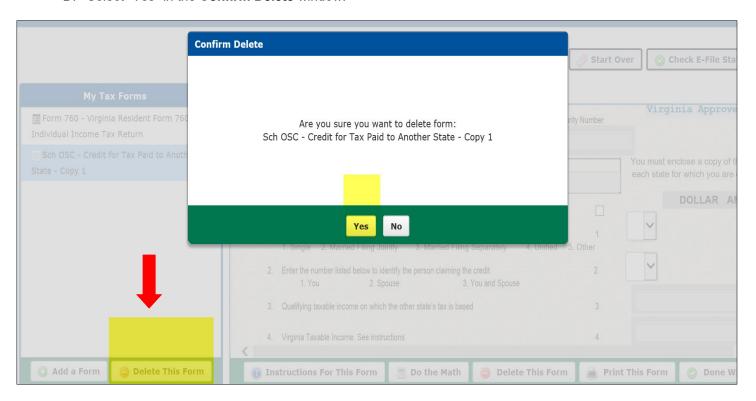
Adding / Deleting Forms & Schedules (continued)

There are 2 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, click "Delete This Form".



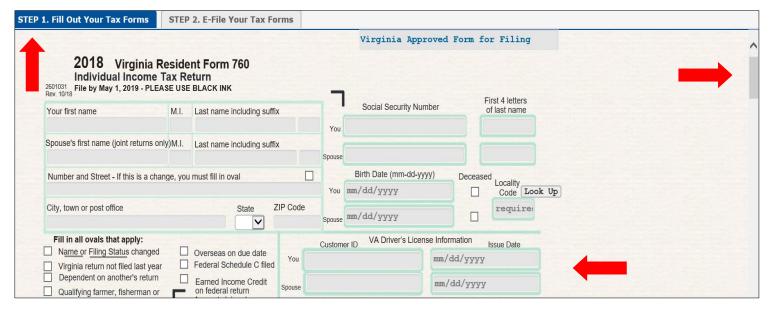
- 2. If the form is not presently displayed on your screen,
 - A. Select the Add/View Forms tab (top right) to display the My Tax Forms screen.
 - B. Select "Delete This Form" (bottom of **My Tax Forms** screen) to display the "Delete This Form" menu.
 - C. Click the form on the "Delete This Form" menu.
 - 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** default Tab (described on Page 9). 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 using all Fillable Forms pages.



Required Information for the "STEP 1" Tab

- Taxpayer's Name and SSN
- 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

Optional Information for the "STEP 1" Tab

Virginia Tax encourages you to provide your driver's license (1st 9 digits) and issue date details as part of the ongoing effort to prevent refund fraud and protect taxpayer information. This data is an extra level of fraud prevention.

IMPORTANT – if you provide Driver's License/Issue Date, you must provide the details requested in Section 4 (ID Information) of the STEP 2 tab (see page 27) to avoid having your return rejected.

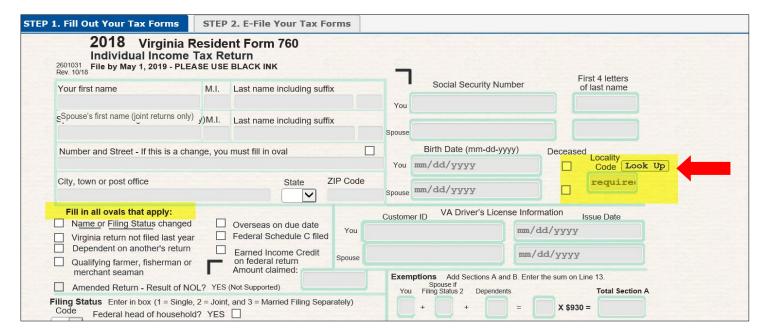
Important Information to Know

Do not put 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.
- Information is required on the 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 VAC, select from the drop down list "Voluntary Contribution Codes" in Part II, Sections A, B, and C.
- 6. If school of **library contributions** are being claimed on Schedule VAC, enter "School and Library Contribution Codes" on Lines 11, 12, and 13.

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.

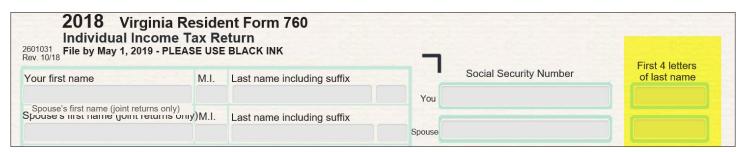
1. Enter your first name and your last name.



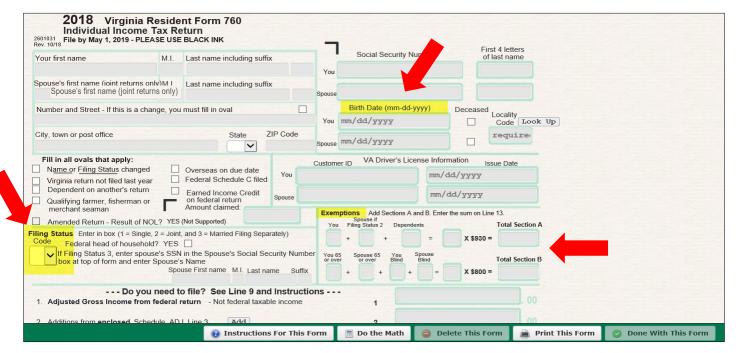
- If the Filing Status is (2) Married Filing Jointly or (3) Married Filing Separately, provide Spouse's first / last name.
- Enter the address in Address Line 1 and Address Line 2 (as applicable).
- 4. Check the Address Change checkbox (as applicable).
- 5. Enter the City Name.
- 6. Click the State field to select State drop down menu.
- 7. Select any of the applicable checkboxes in the "Fill in all boxes that apply" section.

 NOTE: The Amended Return option is not supported in the Fillable Forms program.
- Enter your Social Security Number (SSN).
- 9. If the Filing Status is (2) Married Filing Jointly or (3) Married Filing Separately, provide the Spouse's SSN.
- 10. Provide the Locality Code from the Locality Codes "Look Up" button.
 - A. Click the button to open the document with the list of locality codes.
 - B. Locate your locality on the list.
 - C. Enter the 3-digit number in the Locality Code field.
 NOTE: When a leading "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.

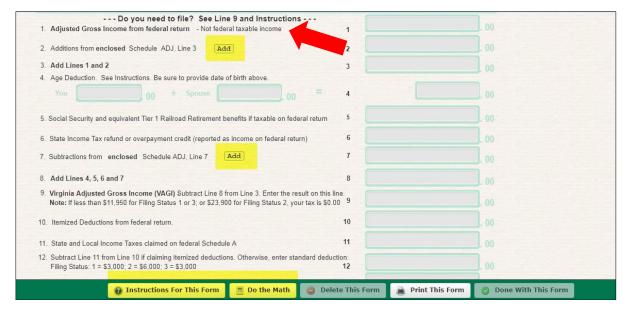


11. Select the applicable Filing Status.

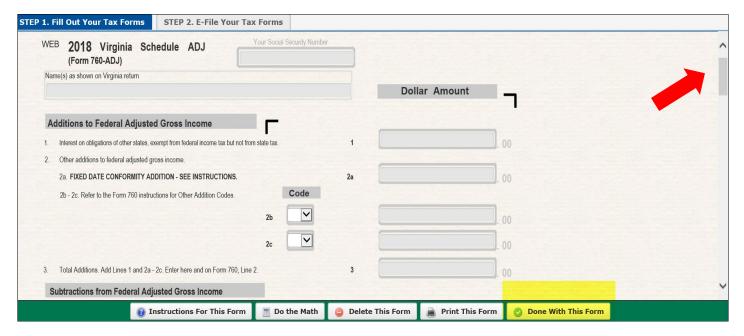


- 12. Enter the applicable exemptions in Exemptions Section A and Section B.

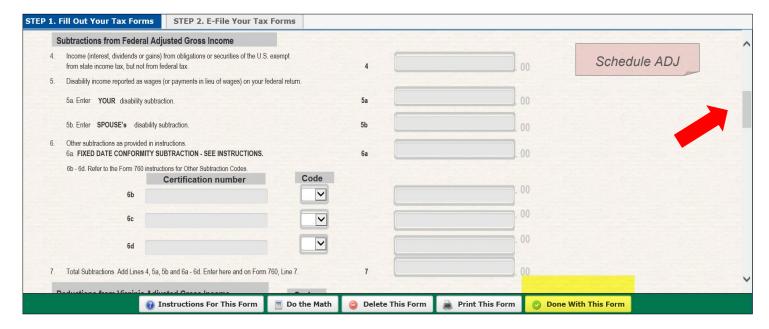
 NOTE: Red circled fields are automated and fill automatically after the "Do the Math" button is clicked.
- 13. Click "Do the Math" button to calculate Exemption Total and Exemption Amount fields.
- 14. Enter your birth date.
- Select the applicable filing status.
 NOTE: Federal head of household is only allowed when the Filing Status is 1 for Single.
- 16. If Filing Status is 2 for "Married Filing Jointly", enter Spouse's birth date.
- 17. Continue working through your Virginia Resident return (Form 760) starting with Line 1.
- 18. If you need 760 line instructions, click the "Instructions For This Form" button (bottom of the page).
- 19. Click "Do the Math" button to ensure calculated fields are properly updated. **NOTE**: This is important to do often while preparing your tax return.



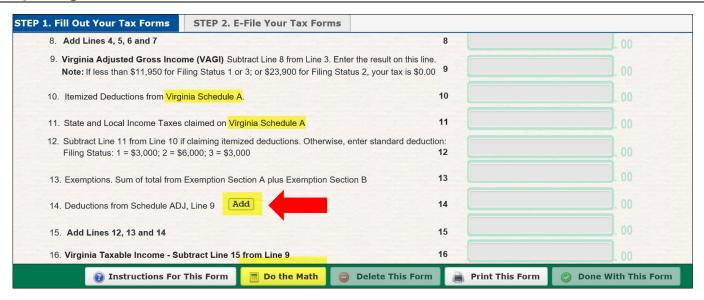
- 20. If you have an amount to report (other than \$0) for Line 2 (Total Additions),
 - A. Click the "Add" button next to Line 2.
 - **NOTE**: A window opens for the Virginia Schedule ADJ. The window for a specific form will open when the related "Add" button is clicked.
 - B. Scroll down and complete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



- 21. Continue working through your Virginia Resident return (Form 760).
- 22. 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 Schedule ADJ section "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.



23. Continue working through your Virginia Resident return (Form 760).



- 24. If you have an amount to report (other than \$0) for Lines 10 and 11 (Virginia Itemized Deductions),
 - A. Open a separate Virginia Schedule A from the Virginia Tax website.
 - B. Complete the Virginia Schedule A to manually calculate amounts used for Virginia itemized deductions.
 - C. Enter the applicable amounts into Fillable Forms 760, Lines 10 and 11.
 - D. Print the completed Virginia Schedule A from our website and set it aside.

IMPORTANT NOTE - Virginia Schedule A

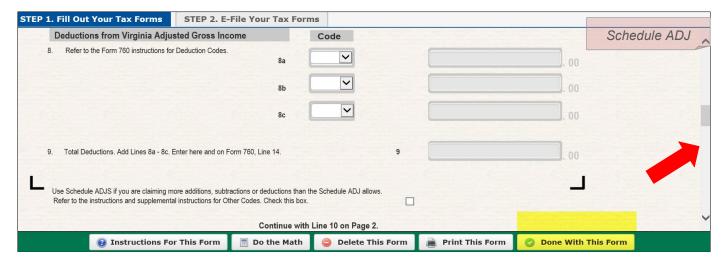
When you claim Virginia Itemized Deductions with Schedule A, you may have an extra step to consider for filing your return.

Planning to mail in your return?	 Continue preparing your return. When you print / mail your return from this program, include the Virginia Schedule A you printed during Step 24.
Planning to e-file your return?	 Continue preparing your return to be e-Filed (as applicable in the guide). Wait until you receive a letter from Virginia Tax that requests you to mail in the Virginia Schedule A you printed during Step 24.

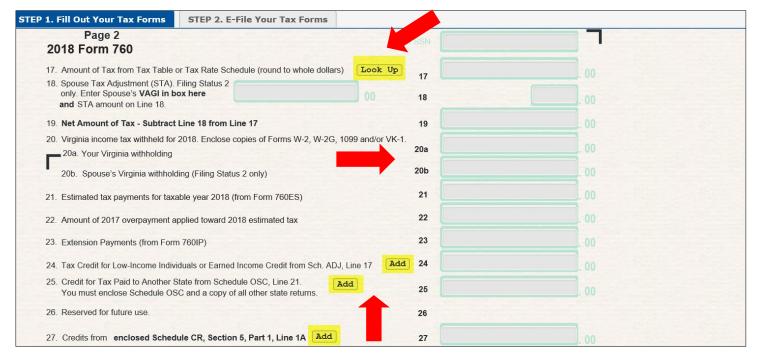
25. Enter the total Exemptions amount for Line 13.

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

- 26. If you have an amount to report (other than \$0) for Line 14 (Deductions from VAGI),
 - A. Click the "Add" button next to Line 14.
 - B. Scroll down and complete Schedule ADJ section "Deductions from Virginia Adjusted Gross Income".
 - C. If the amount is \$0, 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.



- 27. Continue working through your Virginia Resident return (Form 760).
- 28. Click the "Do the Math" button to ensure Form 760 Line 16 (Virginia Taxable Income) is updated.



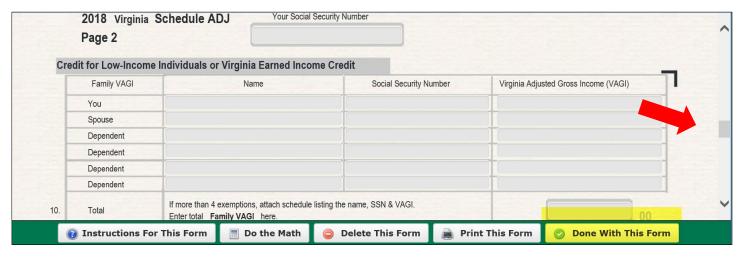
29. Enter your tax amount on Line 17.

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

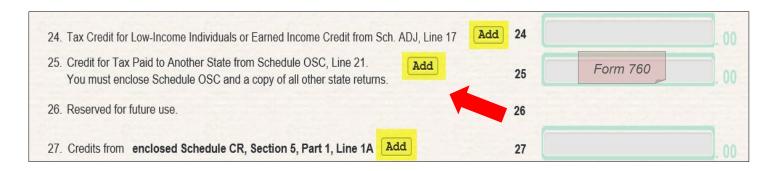
- A. Click on the "Look Up" button.
- B. Locate your tax amount and enter the amount on Line 17.
- 30. If you have Virginia Withholding amounts to claim,

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

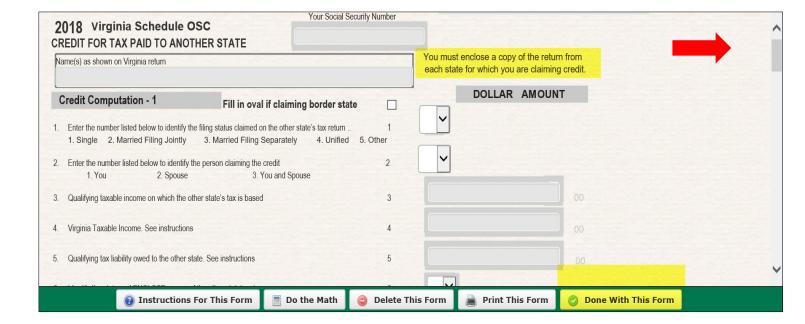
- A. Enter your Virginia Withholding amount on Line 20a.
- B. Enter your Spouse's Virginia Withholding amount on Line 20b (for Married Filing Jointly).
- C. Click the "Do the Math" button.
- 31. Continue working through your Virginia Resident return (Form 760).
- 32. If you qualify for credits to report on Line 24 (Low-Income Individuals or Earned Income Credit),
 - A. Click the "Add" button next to Line 24.
 - B. **Scroll down** and complete Schedule ADJ section "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.



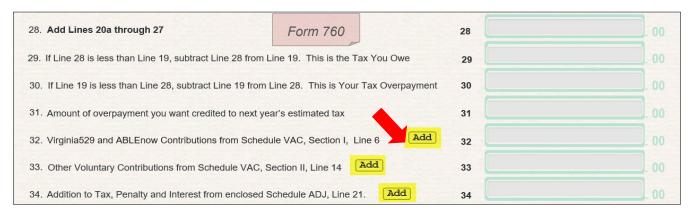
33. Continue working through your Virginia Resident return (Form 760).



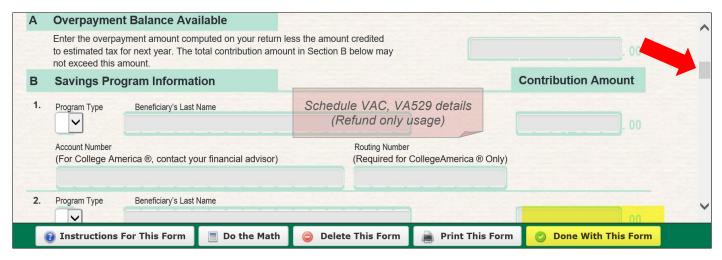
- 34. If you qualify for credits to report on Line 25 (Tax Paid to Another State),
 - NOTE: This means you can complete the return/schedule with Fillable Forms and then print/mail it all at the end.
 - A. Click the "Add" button next to Line 25.
 - B. Scroll down and complete the Virginia Schedule OSC.
 - C. If the amount is \$0, 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.



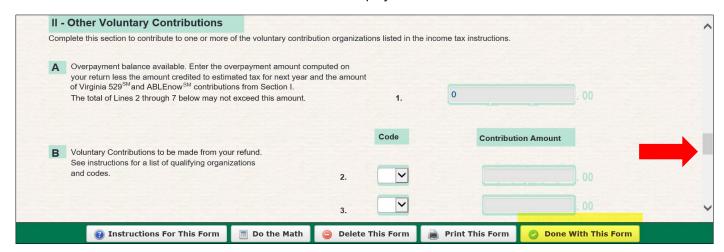
- 35. Continue working through your Virginia Resident return (Form 760).
- 36. If you qualify for credits to report on Line 27 (Other Credits),
 - NOTE: This means you can complete the return/schedule with Fillable Forms and then print/mail it all at the end.
 - A. Click the "Add" button next to Line 27.
 - B. **Scroll down** and complete the related Virginia Schedule CR section(s).
 - C. If the amount is \$0, 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.
- 37. Click the "Do the Math" button to ensure information entered so far is updated.
- 38. Continue working through your Virginia Resident return (Form 760).



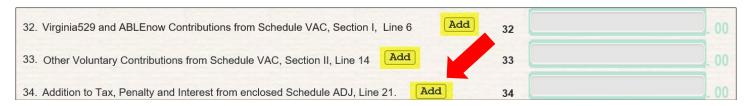
- 39. If you have an amount to report (other than \$0) on Line 32 (Virginia College Savings Plan Contributions),
 - A. Click the "Add" button next to Line 32.
 - B. Scroll down and complete Schedule VAC Section I for "(Virginia529) Contributions".
 - C. If the amount is \$0, do not put \$0 in Line 32 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.



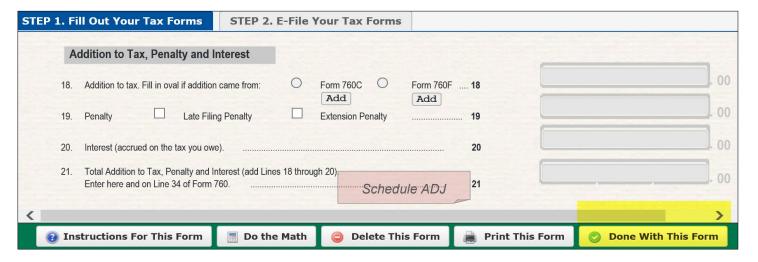
- 40. Click the "Do the Math" button to ensure information entered so far is updated.
- 41. If you have an amount to report (other than \$0) on Line 33 (Other Voluntary Contributions),
 - A. Click the "Add" button next to Line 33.
 - B. Scroll down and complete Schedule VAC Section II "Other Voluntary Contributions".
 - C. If the amount is \$0, 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.



42. Continue working through your Virginia Resident return (Form 760).



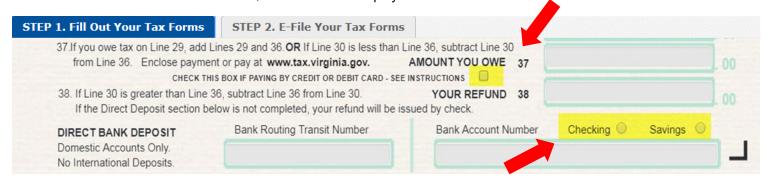
- 43. If you have an amount to report (other than \$0) on Line 34 (Addition to Tax, Penalty and Interest),
 - A. Click the "Add" button next to Line 34.
 - B. Scroll down and complete Schedule ADJ section "Addition to Tax, Penalty and Interest".
 - C. If the amount is \$0, do not put \$0 in Line 34 of Form 760 or in the related Schedule ADJ section.
 - D. Click the "Done With This Form" button to display the Form 760 screen.



- 44. Continue working through your Virginia Resident return (Form 760).
- 45. Review Line 35 for reporting any Sales and Use Tax due.
 - A. If you have an amount to report (other than \$0), enter it on Line 35.
 - B. If you have none to report, leave the field blank and ONLY CHECK the "No Sales/Use Tax" checkbox."



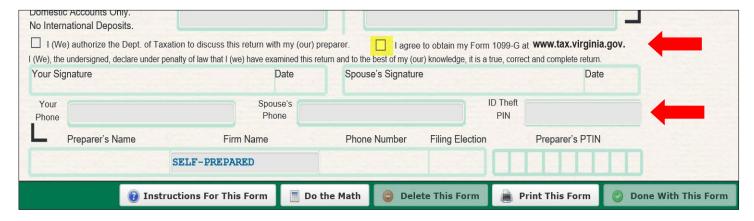
- 46. Click the "Do the Math" button to ensure information entered so far is updated.
- 47. Review Lines 37 and 38 to determine if you have to pay or if you have a refund. **NOTE**: A return that results in \$0 taxes due will display "0" on Line 38.



- 48. If an amount displays on Line 37 you have taxes to pay.
 - A. Click the "Credit Card" Checkbox if either situation applies to you.
 - You plan to pay with a Credit / Debit Card.
 - You already paid with a Credit / Debit Card.
 - B. <u>To pay electronically with your Fillable Forms return</u>, have your banking details ready to enter it into the payment section later on the "STEP 2" tab.

NOTE: Completing the payment section on the STEP 2" tab allows Virginia Tax to electronically withdraw the funds from your bank account.

- 49. If an amount displays on Line 38 you have a refund.
 - To have a Direct Deposit of your refund into your bank account,
 - Select the Checking or Savings radio button.
 NOTE: Forgetting to select the correct radio button will cause your return to reject.
 - 2. Enter the Bank Routing Transit Number.
 - 3. Enter the Bank Account Number.
 - B. To receive a **paper refund check**, leave the Direct Deposit section blank. **NOTE**: A blank/incomplete Direct Deposit section also causes your refund to be issued as a paper check.
- 50. If you plan to download your 1099-G online from the Virginia Tax website, check the "1099-G" checkbox.



- 51. Provide the applicable phone number(s).
- 52. <u>If Virginia Tax issued you a PIN for your Tax Year 2018 return</u>, enter it into the ID Theft PIN field. **NOTE**: This PIN is 7-characters and is only eligible for one tax year. Do not use an expired PIN or a PIN that was assigned by the IRS.
- 53. Before you continue to the "STEP 2" Tab review all information entered on the "STEP 1" Tab.

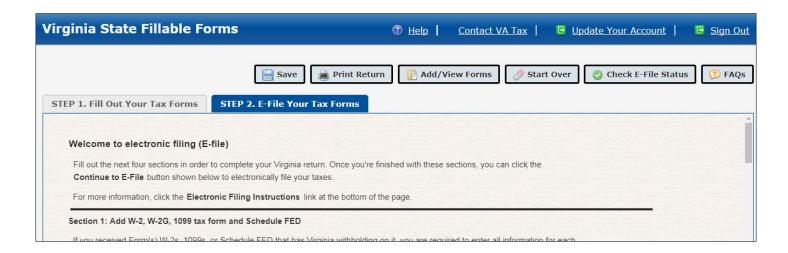
Preparing & e-Filing Your Form 760 – "STEP 2" Tab

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.

All required information in Fillable Forms **must be complete** before you will be able to e-File your return.

The "STEP 2" tab contains 4 sections.

- Section 1 Federal Information Needed for Virginia Return
 - Federal Withholding (adding Virginia Withholding details for income documents)
 - Schedule FED
- Section 2 Electronic Signature
 - o Part A: Enter Email Address
 - Part B: Taxpayer PIN (always) and Spouse PIN (for filing status Married Filing Jointly)
- Section 3 Refund / Payment Options
 - o Part A: International ACH Transactions Question
 - o Part B: Refund
 - o Part C: Pay Tax Due by Check
 - o Part D: Pay Tax Due by Credit or Debit Card
 - Part E: Pay Tax Due with eForms
 - o Part F: Pay Tax Due by Electronic Withdrawal (Debit)
- Section 4 Verify Identify Information
 - o Part A: Cell Phone Number
 - Part B: Type of ID
 - o Part C: Driver's License / State Issued ID Issue Date
 - o Part D: Driver's License / State Issued ID Expiration Date
 - o Part E: Non-Expiring ID Checkbox

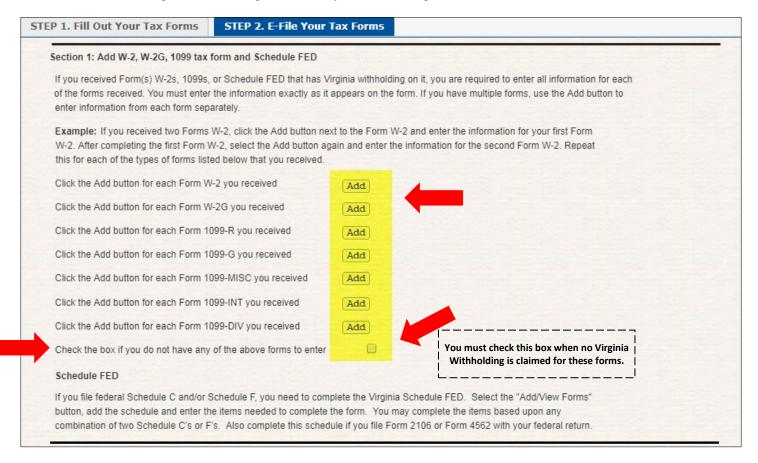


Required Information For the "STEP 2" Tab

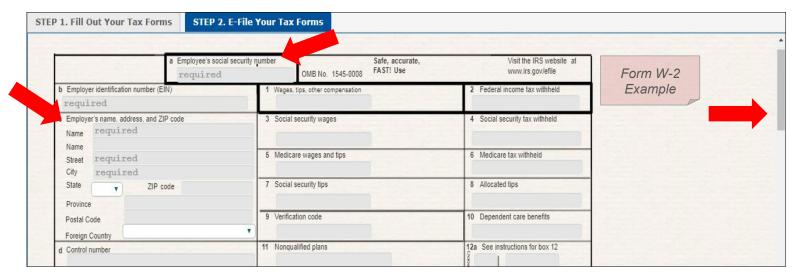
Data is required in the following fields and must be filled out in Step 2.

- 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.

- 1. Begin reviewing the 1st section of the "STEP 2" Tab.
- 2. If there is no Virginia Withholding to claim on your withholding forms, check the box indicated below



- 3. 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: Virginia Tax recommends that you provide all information, including name and SSN. It is important to click the cursor into each field to enter your details. Required fields are clearly identified.
 - C. Click the "Done With This Form" button to display the "STEP 2 Tab" screen.
 - D. Repeat Steps 3A 3C until all withholding forms are reported.

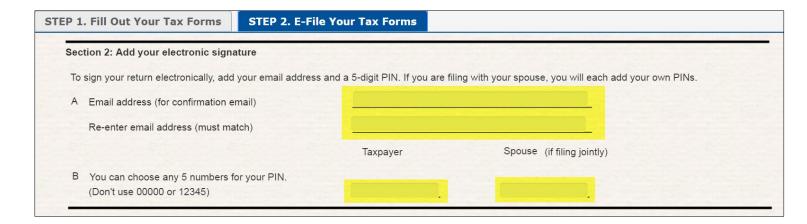


- 4. If you need to complete Virginia Schedule FED,
 - A. Click the "Add/View" Forms button
 - B. Complete the form according to the instructions displayed in Section 1, Part B.



5. Begin reviewing the 2nd section of the "STEP 2" Tab for your electronic signature.

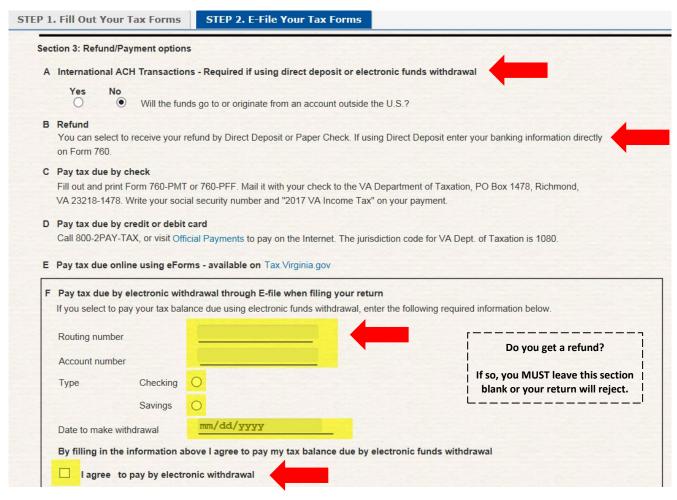
NOTE: This does not apply to taxpayers who must print and mail their return to Virginia Tax.



- 6. Enter a valid email address to receive your Fillable Forms confirmation email.
- 7. Enter the same valid email address again to ensure it matches the first.
- 8. 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.
- 9. If the filing status is Married Filing Jointly, enter a 5-digit PIN in the Spouse field.

10. 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 Virginia Tax.



11. Answer the **required** "International ACH Transactions" question.

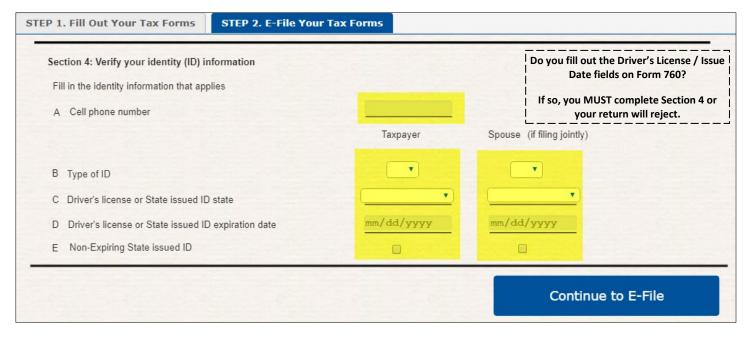
International ACH Transactions

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 Virginia Tax does not support.

If an IAT is processed by Virginia Tax as a domestic transaction, the bank may reject it and subject the customer to late penalties. By instructing Virginia Tax 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. If you owe taxes per Line 37 on Form 760, review your payment options.
 - A. To **pay by check**, use the Virginia Tax payment voucher.
 - 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. To pay electronically with your Fillable Form, enter your details so Virginia Tax can withdraw the funds.
 - 1. Enter your Routing Number and your Account Number.
 - Select the Type of Account Checking or Savings.
 NOTE: Not selecting the correct type of account will cause your return to reject.
 - 3. Enter a Date for Withdrawal.
 - **NOTE:** Warehousing a payment for a future date is available only until the Virginia due date.
 - 4. Check the "Electronic Withdrawal Agreement" checkbox under Section 3, Part F.

13. Begin reviewing the 4th section of the "STEP 2" Tab.



14. Enter the applicable identify verification information.

NOTE: This information is requested for identification purposes and fraud prevention and is needed if you provided the Driver's License / Issue Date details on Page 1 of Form 760. Although optional, if you choose to enter identity data for one field, then you must enter data for all of the fields. Missing details will cause your return to reject.

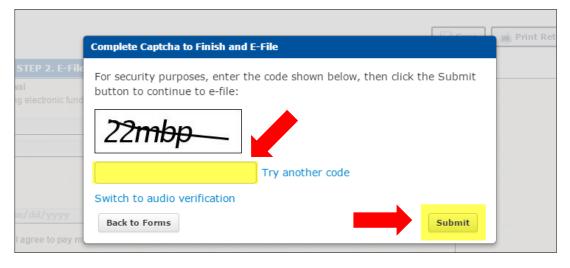
- A. Cell Phone Number We do not initiate any automated outbound calls requesting citizen information.
- B. Type of ID also select for Spouse when using Filing Status 2
- C. Driver's License / State Issued ID Issue Date also enter Spouse when using Filing Status 2
- D. Driver's License / State Issued ID Expiration Date also enter Spouse when using Filing Status 2
- E. Non-Expiring State Issued ID checkbox also enter Spouse when using Filing Status 2

 NOTE: This checkbox can ONLY be used if 'S-State Issued ID' as the Type of ID is selected.
- 15. Click the "Continue to E-File" button.

NOTE: The button may be used when all information in the "STEP 1" and "STEP 2" Tabs is complete.

16. Enter the "Captcha" Code display on the screen.

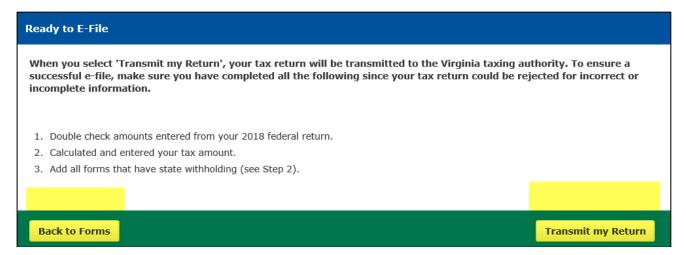
NOTE: You can have the code played for you if you cannot distinguish the letters/numbers displayed in the code. Please ensure your computer speakers are on if you want to hear the audio.



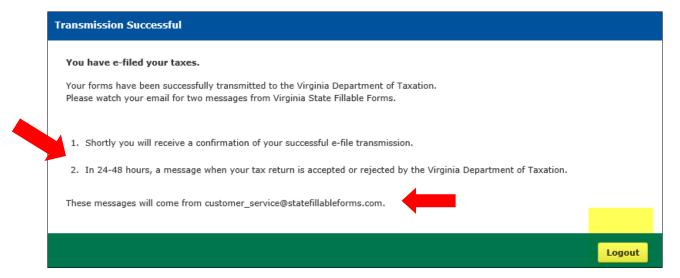
17. Click the "Submit" button.

After "e-File Now" is Clicked

Once you click the "Submit" button (after a correct entry of the "Captcha Code"), a message will display with 2 options: to e-File the return or to review the return.



- 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 Continue to e-File steps.
- 2. <u>If you want to submit your return to Virginia Tax</u>, click the "Transmit my Return" button. **NOTE**: This will cause your return to be e-Filed to Virginia Tax.



- 3. Click the "Logout" button.
- To print a copy of your filed return, click the "Start Fillable Forms" button to log back in to your account.
 NOTE: Virginia Tax recommends this since Fillable Forms information can only be accessed until November 1st.

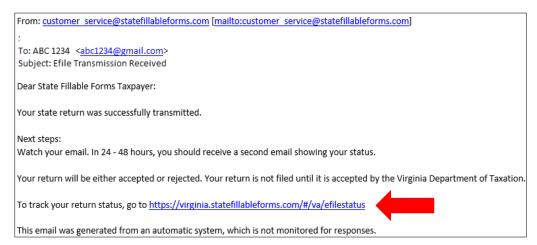


5. Click the "Print Return" button.

Confirmation Emails - Accepted or Rejected

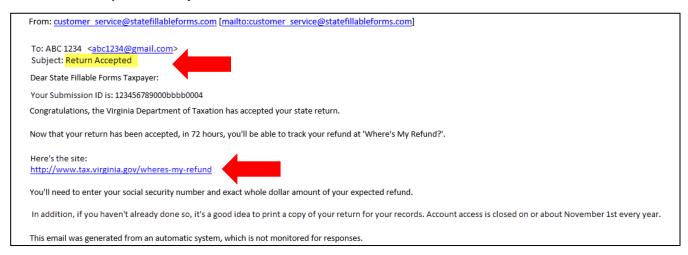
Once you submit your return, Fillable Forms sends a "Transmission Received" email to the address from your profile.

All of the automated emails are sent from customers service@statefillableforms.com.



After you submit the return, there are 2 possible outcomes -

- the return was accepted and there are no errors
- the return was rejected and there are errors you must fix
- 1. If your return was **accepted**, you will receive an email like this one.
 - subject line will display "return accepted"
 - accepted means your return has been filed



- 2. <u>If your return was **rejected**</u>, you will receive an email like this one.
 - subject line will display "return rejected"
 - rejected means your return has not been filed and requires further action by you

