
Guide to Filing Your Own Taxes

For US Residents



UNITED WAY
Pickens County

FREE FILE

This Guide is for:

- U.S. Residents
- Annual household income of \$84,000 or less
- Someone who has access to a desktop or laptop computer with basic computer literacy skills

Go to [MyFreeTaxes.com](https://www.myfreetaxes.com)

Select File My Own Taxes



HOW WOULD YOU LIKE TO FILE YOUR TAXES?



File My Own Taxes

- Our most popular option
- Self-file and get help when you need it
- Fastest (takes most filers an hour or less)

Select option



Have My Taxes Prepared for Me

- Have your return prepared for you online or in-person
- Typically takes 1-2+ weeks
- For filers who make about \$60,000 or less

Select option



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Answer the following questions:

LET US HELP YOU FILE YOUR OWN TAXES FOR FREE.

This is a great option for people who:

- Are filing a current year return (for 2024 taxes)
- Are comfortable using tax software, or want to learn.

DID YOU EARN LESS THAN \$84,000 IN 2024?

YES NO

WHAT IS YOUR ZIP CODE?

Zip code:

DO YOU HAVE INCOME FROM SELF-EMPLOYMENT?

YES NO



I WOULD LIKE TO OPT-IN TO BE CONTACTED BY UNITED WAY (OPTIONAL).

Scroll down and select
“File Now”

Select Continue...

Welcome to the TaxSlayer VITA/TCE self-prep kiosk

- No current year preparation or electronic filing Fees
- Unlimited current year states
- Access to prepare and e-file 1040-NR
- Access to prepare and e-file 1040PR

For assistance while completing your return, please contact the free tax assistance program where you received the referral link to this software. They have IRS-certified specialists available to assist you.

Click the Continue button to create a new account or login with an existing account.

CONTINUE

Sign In

It should look like this:



Log In

Need a TaxSlayer account? [Create account.](#)

Username

Password

[Forgot Username](#) | [Forgot Password](#)

LOG IN

By clicking 'Log In', you agree to TaxSlayer's [License Agreement](#), [Privacy Policy](#), and [Terms of Service](#).

If this is your first time doing your own taxes using TaxSlayer, click on "Create Account."

If you did your tax return here last year, enter your username and password from last year. Select "Forgot" Username or Password if needed.



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Create Your Account



Create your account.

Already have an account? [Log In](#)

Email address

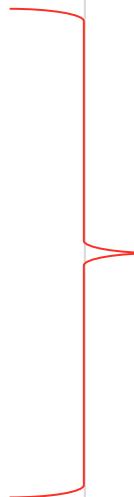
Username

Password

Mobile phone

CREATE ACCOUNT

By clicking "Create Account", you agree to TaxSlayer's [License Agreement](#), [Privacy Policy](#), and [Terms of Service](#).



If this is your first time doing your own taxes using TaxSlayer, complete the required fields to create an account!



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Success!



Success! Your TaxSlayer account
has been created.

Now, let's keep going.

CONTINUE

← Click Continue

Signing the Disclosure

Before you get started, please review the following disclosure. Section 301-7216 of the Internal Revenue Code specifically governs the use and disclosure of tax return information. Some states may also have additional laws and regulations related to use and disclosure of the same information. We use your tax return information only in accordance with those applicable laws and regulations to prepare and assist in preparing your tax return, to provide services associated with preparing your tax return, and to provide you with other products and services you specifically request or consent to.

Please review the information below and sign to agree to the terms and conditions.

Use of Information

As permitted by law, we may use the information you provide to address questions submitted to our customer or technical support systems; to send updates or security alerts; to provide notification of related tax return preparation products or services; or product enhancements; to monitor and investigate fraud, identity theft, and other illegal activity; and to personalize and improve our services.

Note that if you are not eligible for the Free-File product, you may switch to a commercial product which may

PRINT

Ensure the details below are accurate:

Full Name* ← Enter your full name

Date* 02/10/2024

I am filing a joint return with my spouse.

REMIND ME LATER: ← You can also wait and complete at the end by selecting “Remind Me Later.”

Select Box if
Married
Filing Jointly →

Personal Information

Personal Information

Taxpayer's Information 

Primary First Name MI

Last Name Suffix (Jr, Sr, etc.) 

Social Security Number - -

Date of Birth   

Occupation



Tips:

Double-check the spelling of your name and the accuracy of your social security number.

Your name needs to match what's on your social security card.

Personal Information

What's your mailing address?

Country

United States of America

Address (street number & name) *

123 Silverado st

Apartment (provide apartment number only)

ZIP code *

90301

City, town, or post office *

Inglewood

State *

South Carolina

Residency Status *

- Please Select -

 Residency Status is required.

I have a stateside military address.

Personal Information



Tip: If you don't have a mailing address, ask a shelter, clinic, or center to use their address

For Residency Status, select

- “Full-Year of the State” if you lived in your state the full tax year.
- “Part-Year State Resident” if you lived in multiple states in the tax year.

Additional Information

Nicole Information

Check all that apply:

- Nicole can be claimed as a dependent on someone else's return. 
- Nicole was over age 18 and a full-time student at an eligible educational institution. 
- Nicole is blind.
- Nicole is deceased.
- Nicole wishes to contribute \$3 to the Presidential Election Campaign Fund.
- Nicole served in a combat zone during the current tax year. 
- Nicole was affected by a natural disaster during the current tax year.
- Nicole received, sold, exchanged, gifted, or disposed of a digital asset (or financial interest in a digital asset) in the current tax year.
- Nicole prefers to receive written communications from the IRS in a language other than English.
- Nicole prefers to receive written communications from the IRS in an accessible format.

Personal Information

Check any boxes that apply to you.

[BACK](#)[Skip](#)[CONTINUE](#)

What's your filing status? ?

- Single
- Married Filing Jointly
- Married Filing Separately
- Head of Household
- Qualifying Surviving Spouse
- Nonresident Alien

Need help determining your filing status?

[FILING STATUS WIZARD](#)

[BACK](#)

[CONTINUE](#)

Filing Status

Use the filing status wizard if you are not certain.

If you choose the wrong filing status, you'll need to start the whole return over.



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Dependents

Dependents or Qualifying Person(s)

Do you have children or relatives who rely on you for support and live in your home? If so, you might be able to receive potential tax credits and tax exemptions that could save you money on your tax bill. But before you get too excited, there are some situations when a child's exemption status is a little more complicated. The IRS does have special rules for those situations. 

Do you have any dependents or qualifying person(s) to claim on your return?

Yes
 No

BACK

Skip

CONTINUE

Select the answer that applies to you.

If you have dependents, complete this section with their information.

IP PIN

Select Yes if the IRS issued you a six-digit PIN. This is typically assigned to you if you experienced tax fraud or identity theft.

If not, select No.

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IRS Identity Protection PIN

Did you or anyone on your tax return receive a CP01A notice from the IRS containing a 6-digit Identity Protection PIN? [?](#)

- Yes, someone on my return received an Identity Protection PIN.
- No, no one on my return received an Identity Protection PIN.



BACK

Skip

CONTINUE

Getting Started!

Review your basic information and edit if necessary. When everything is accurate, hit continue.

Let's do this! #slayit

Now that we know more about you, let's dig into your tax return.

CONTINUE

Add your forms quickly with Quick File

If you know which forms you need, easily search and add them to your tax return.



BACK

I don't know which forms I need

CONTINUE

Let's look at the money you earned

Now that we've got your basic information covered, it's time to get down to business. Let's start with the money you earned in 2022! How would you like to enter your income?



I want to be guided

I want to be guided by answering questions about my tax situation



Select my forms

I want to select my forms from a list and enter the information myself

BACK

Skip Income

CONTINUE

Quick File

If you know the forms you need to file, you can select "Quick File"

If you're not sure, select "I do not know"

If you feel confident in finding the forms you need, you can choose "Select my forms"

If you aren't sure or want some more guidance, choose "I want to be guided"

Income

Income

W-2 (Most Common Form) 
Wages and tax statement

Select continue until you see this page: 

ADD/EDIT

1099-B 
Proceeds from broker and barter exchange transactions

BEGIN

1099-G Box 1 
Unemployment compensation

BEGIN

1099-G Box 2 
State or local income tax refunds, credits, or offsets

BEGIN

1099-INT, DIV, OID 
Interest income, dividends, and distributions

ADD/EDIT

1099-K 
Payment card and third party network transactions

BEGIN

1099-MISC 
Miscellaneous income

BEGIN

1099-NEC 
Nonemployee compensation

BEGIN

1099-R, RRB, SSA 
Distributions from pensions, annuities, retirement, IRAs, social security, etc.

BEGIN

Enter the information exactly as it is on your W-2 form

Form W-2

W-2

Check any of these that apply to you:

Don't worry, most people won't need to check these boxes.

- This is a corrected W-2
- This is a substitute W-2
- This is a railroad W-2

b Employer identification number (EIN) *

c Employer's name *

Country *

 United States

Address (number and street) *

ZIP Code *

City *

State *

-- Please Select --

1 Wages, tips, other

 \$

2 Federal tax withheld

 \$

3 Social security wages

 \$

4 Social security tax withheld

 \$

5 Medicare wages and tips

 \$

6 Medicare tax withheld

 \$

7 Social security tips

 \$

8 Allocated tips

 \$

9 IRS verification code

10 Dependent care benefits

 \$

11 Nonqualified plans

 \$

Unreported tips

 \$

12 [? Learn More](#)

a - Code

Income

Continue through the forms and add any income you received during the tax year.

Distributions from pensions, annuities, retirement, IRAs, social security, etc.

8915-F

Deferred Retirement Income Due to Disaster Relief in a Prior Year

BEGIN

Alimony Received

?

Payments from a former spouse under a legal agreement

BEGIN

Investments

?

Capital gains and losses reported on Schedule D

BEGIN

Profit or Loss from Business

?

Reported on Schedule C

BEGIN

Profit or Loss from Farming

?

Reported on Schedule F

BEGIN

Profit or Loss from Rentals and Royalties

?

Reported on Schedule E

BEGIN

Less Common Income

?

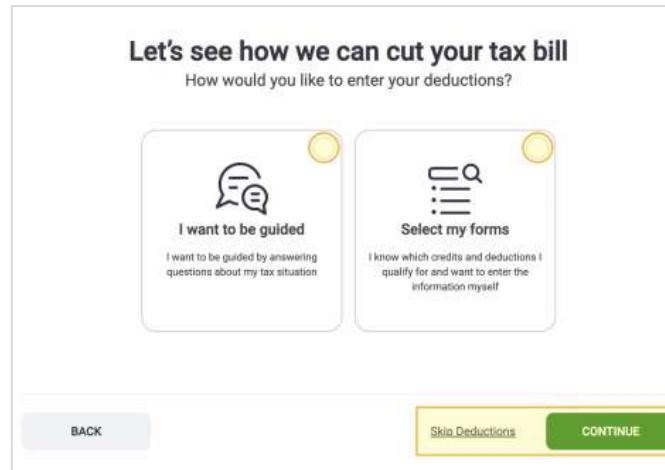
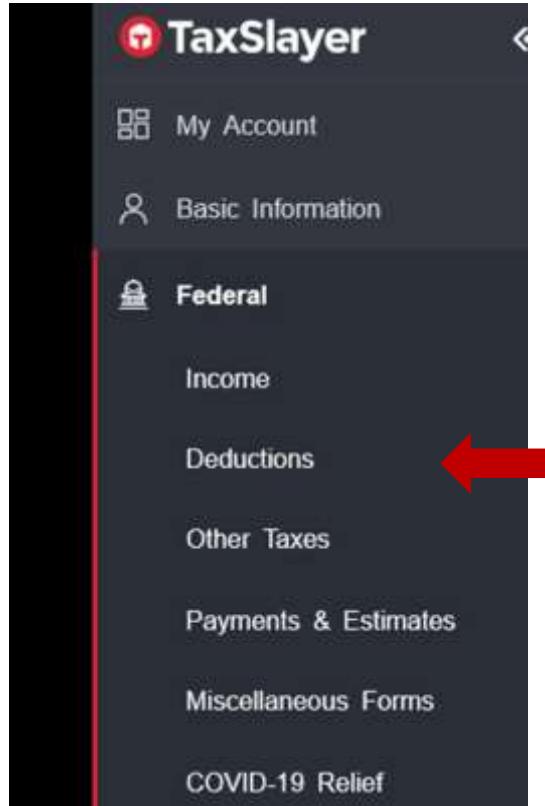
K-1 earnings, gambling winnings, cancellation of debt, etc.

BEGIN

BACK

CONTINUE

Deductions



If you know which deductions you qualify for, you can choose “Select my forms”

If you aren’t sure or want guidance, choose “I want to be guided”

Deductions

If you have an HSA or FSA (medical savings account – complete forms here)

Adjustments to Income

Educator expenses, medical savings accounts, student loan interest, etc.

[ADD/EDIT](#)

K-12 Teachers - complete applicable forms here

Credits

Child and dependent care credit, education credits, mortgage interest credit, etc.

[ADD/EDIT](#)

Itemized Deductions

Charitable contributions, mortgage interest, property taxes, etc.

[BEGIN](#)

If you are itemizing – complete the applicable forms here.

Standard Deduction

Flat amount based on filing status

[BEGIN](#)

The system will automatically apply standard deduction. Choose this section to see how much the standard deduction is for your filing status.

View Standard vs. Itemized Deductions

Compare your total deduction amounts

[BEGIN](#)

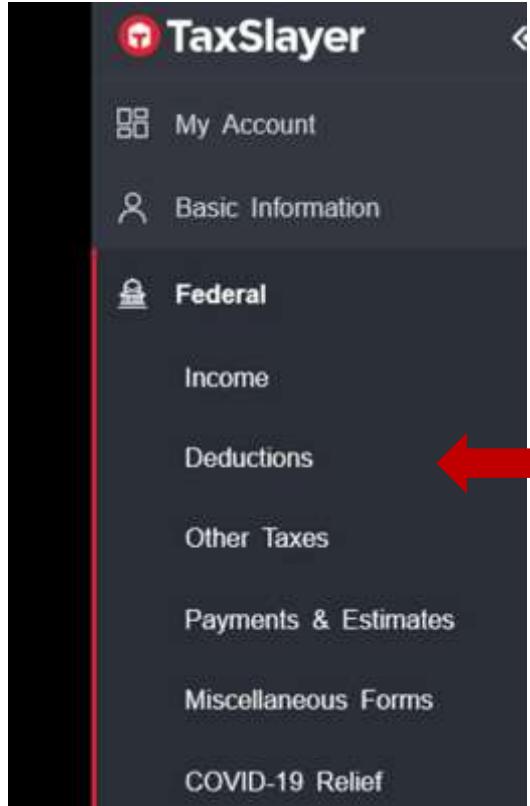


TIP: If you are unsure, go ahead and complete both sections. The system will tell you if it's more advantageous to take the standard deduction or itemize.

[BACK](#)

[CONTINUE](#)

Other Deductions



The next section will cover the following deductions:

- Car & Personal Property Expenses
- Job-Related Expenses
- Various Tax Payments
- Retirement Investments
- Casualties and Thefts
- Elderly or Disabled Credit
- Alimony Paid
- Other Deductible Expenses
- Early Withdrawal Penalty
- Other Miscellaneous Deductions

Answer the questions according to your situation.

Click on the question mark icon for more information on the question if you aren't sure.

Other Taxes

 **TaxSlayer**

- My Account
- Basic Information
- Federal**
 - Income
 - Deductions
 - Other Taxes** 
- Payments & Estimates
- Miscellaneous Forms
- COVID-19 Relief

Other Taxes

Additional Taxes on Qualified Plans and Other Accounts 
Reported on Form 5329

BEGIN

Alternative Minimum Tax (AMT) 
Reported on Form 6231

BEGIN

Household Employment Taxes 
Reported on Schedule H

BEGIN

Net Investment Income Tax (NIIT)
Reported on Form 8960

BEGIN

Recapture of Investment Credit
Reported on Form 4255

BEGIN

Parents' Election to Report Child's Interest and Dividends 
Reported on Form 8814

BEGIN

Recapture of Federal Mortgage Subsidy
Reported on Form 8828

BEGIN

Repayment of First-Time Homebuyer Credit 
Reported on Form 5405

BEGIN

Self-Employment Tax
Reported on Schedule SE

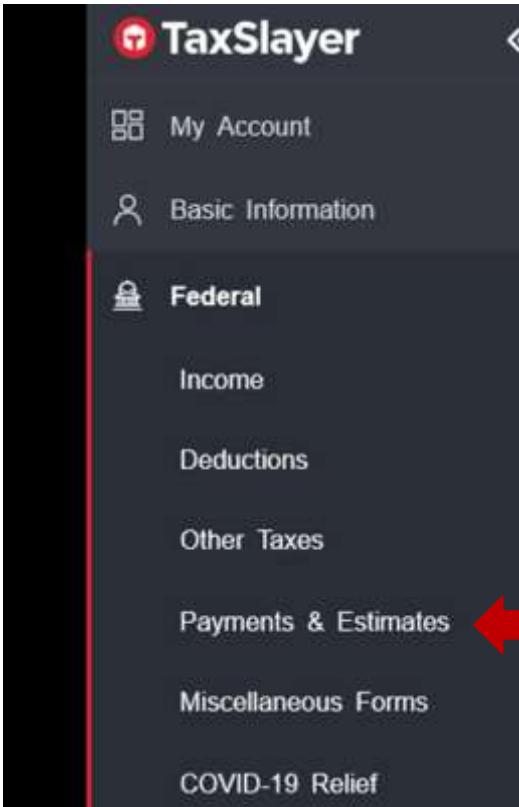
BEGIN

Complete each section that applies to you in Other Taxes. Click on the question mark icon for more information.



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Payments & Estimates



Payments and Estimates

Amount Paid with Extension ?

This is the amount you paid when you applied for a 6-month extension using Form 4868

BEGIN

Federal Estimated Tax Payments ?

Federal tax payments already made for 2023

BEGIN

State Estimated Tax Payments ?

State tax payments already made for 2023

BEGIN

Other Federal Withholdings ?

Federal withholdings you haven't already entered

BEGIN

Other State Withholdings ?

State withholdings you haven't already entered

BEGIN

Underpayment of Estimated Tax ?

Determine if you owe a penalty for underpayment of estimated tax and next steps

BEGIN

Apply Overpayment to Next Year's Taxes ?

You can take the cash now or roll it over to next year's taxes. Up to you!

BEGIN

Vouchers for 2024 Estimated Tax Payments ?

Print vouchers for estimated tax payments

BEGIN

Complete each section that applies to you in Payments and Estimates. Click on the question mark icon for more information.

Miscellaneous Forms



My Account

Basic Information

Federal

Income

Deductions

Other Taxes

Payments & Estimates

Miscellaneous Forms

COVID-19 Relief

Miscellaneous Forms

Allocation of Tax Amounts for Individuals in Certain States ?

Reported on Form 8958 (Only for married filing separately and some domestic partnerships)

Application for Automatic Extension of Time to File ?

Applied for on Form 4868

Injured Spouse Allocation ?

Reported on Form 8379

Form 8857

Innocent Spouse

Installment Agreement Request ?

Requested on Form 9465

IRS Identification PIN ?

This is the PIN you need if you received a CP01A notice from the IRS

Statement of Person Claiming Refund Due a Deceased Taxpayer ?

Claimed on Form 1310

Statement of Specified Foreign Financial Assets

Form 8938

Application for Tentative Refund

Form 1045

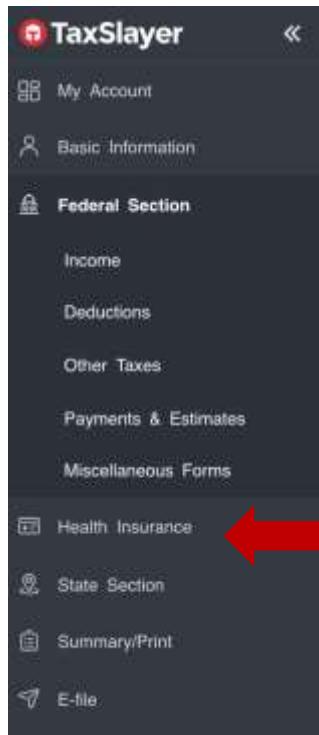
Other Miscellaneous Forms

Complete each section that applies to you in Miscellaneous Forms. Click on the question mark icon for more information.



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Health Insurance



The screenshot shows the TaxSlayer software interface. The left sidebar has a dark background with white icons and text. The 'Health Insurance' option is highlighted with a red arrow pointing to it. Other options in the sidebar include 'My Account', 'Basic Information', 'Federal Section', 'Income', 'Deductions', 'Other Taxes', 'Payments & Estimates', 'Miscellaneous Forms', 'State Section', 'Summary/Print', and 'E-file'.

If you had Marketplace Health Insurance through the government, complete this section using your Form 1095-A.

If you did not have Marketplace Health Insurance, select "No" and Continue

Affordable Care Act Insurance Plans

Reported on Form 1095-A

Did you, your spouse, or a dependent have insurance under the Affordable Care Act?* ?

If so, select Yes – you must report Form 1095-A for the IRS to accept your return. If you did not have an Affordable Care Act insurance plan, select No.

Yes

No

If you are not sure if you had Marketplace Health Insurance during the tax year OR did not receive Form 1095-A, but believe you had Marketplace Health Insurance, go online to healthcare.gov to create an account to get your form OR call 1-800-318-2596 for assistance.



Nice work
on your
federal
return!

Congrats! Now
you're ready to
move on to your
state return.

NEXT UP

Let's get started on your state return

We'll transfer your information from your federal to your state return automatically, so this should be quick! You'll enter some state-specific information, and we'll help you find all possible tax breaks.

If you qualify for a free federal return, you can file a free state return for the following states:
Arizona, Arkansas, Dist of Columbia, Georgia, Idaho, Indiana, Iowa, Kentucky, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, Montana, New York, North Carolina, North Dakota, Oregon, Rhode Island, South Carolina, Vermont, Virginia, West Virginia

Returns for all other states are \$10.00

TaxSlayer

- My Account
- Basic Information
- Federal Section
- Health Insurance
- State Section
- SummaryPrint
- Efile
- 2019 Amended Return
- Mailbox
- Settings
- Toolbox
- Save & Log Out

Start state return

GET STARTED

The following states do not have individual income tax returns:

Choose State

Please Select



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State Return

Add your state.

State Return

For Residency Status, select

- “Full-Year of the State” if you lived in your state the full tax year.
- “Part-Year State Resident” if you lived in multiple states in the tax year.

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Help & Support 

Select your South Carolina Return Residency

Please choose a return type

Resident: You are a Resident if South Carolina was your domicile for the entire year OR you live outside of South Carolina AND your intention is to maintain South Carolina as your permanent home AND South Carolina is the center of your financial, social and family life AND when you are away, South Carolina is the place to which you intend to return. (Part year residents may choose to file a resident or nonresident return)

Non-Resident: You are a Nonresident if you were not a resident of South Carolina but earned South Carolina income. If you are filing a joint tax return and one spouse is a resident of SC but the other spouse is not, select to file the SC Nonresident return and adjust the taxable income on Schedule NR. (Part year residents may choose to file a resident or nonresident return)

CANCEL

CONTINUE



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For South Carolina, you'll just need to add your county in Basic Information and then exit the state return.

State Return

For more information on state taxes, visit your state's Department of Revenue website.

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Help & Support 

South Carolina Return

Select the County where you live

Out-of-state losses included in your Federal taxable income

BEGIN

CONTINUE

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[Privacy Policy](#)



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State Return

If none of these apply, select No, Continue



Congrats! We've created your standard South Carolina return based on your federal information.

Some taxpayers have additional items to include. Do you need to add anything else to your South Carolina return?

Common Credits:

- ✓ Age 65 or over
- ✓ Lived or worked in another state(s)
- ✓ Claiming a credit for Sales Tax paid to another state
- ✓ Contributed to an SC college investment fund
- ✓ Volunteer firefighter, SC Guard, or rescue worker
- ✓ Claiming AMT Credit

NO, CONTINUE **YES, ADD MORE ITEMS**

State Return

! If you need to change your state residency status just delete the current return and start again. State forms differ by the type of residency you select.

 Add Another State Return

If you lived or worked in multiple states during the tax year, be sure to add in all states.

South Carolina
Resident

...

Summary/Print

TaxSlayer «

- My Account
- Basic Information
- Federal Section
- Health Insurance
- State Section
- Summary/Print**
- E-file
- Mailbox
- Settings
- Save & Log Out

Tax Return Summary



Total Income	\$0.00
Adjusted Gross Income	\$0.00
Tax and Credits	\$0.00
Total Tax	\$0.00
Payments	\$0.00
Amount You Owe	\$0.00

PRINT ▾ **VIEW RETURN**

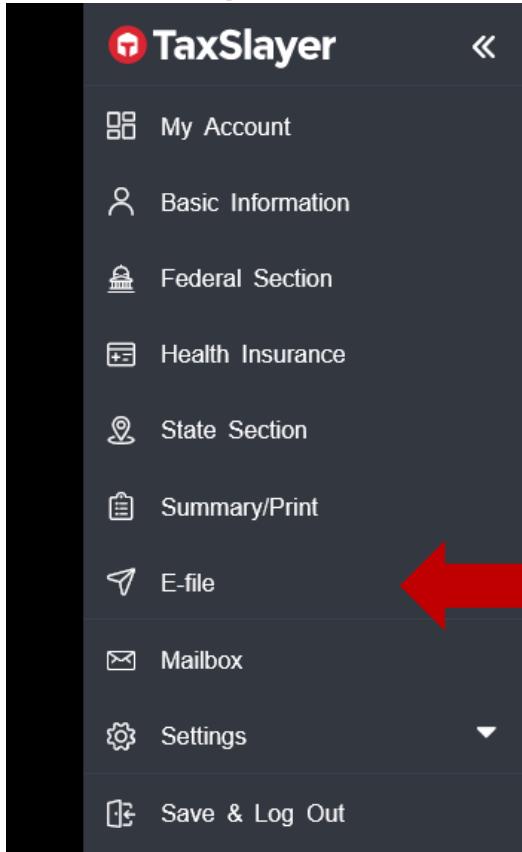
Click “View Return” and save a copy for your files.



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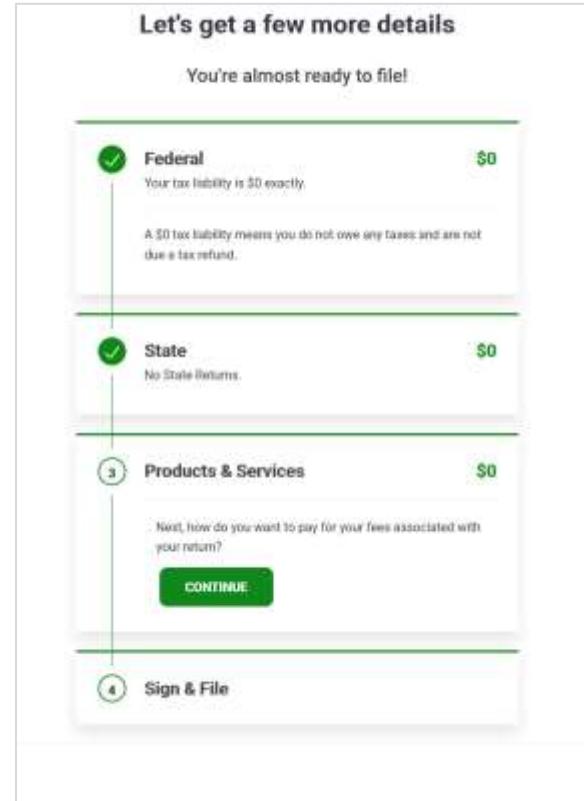
Ready to File?



The image shows the mobile application interface for TaxSlayer. At the top is the TaxSlayer logo. Below it is a navigation bar with the following items: My Account, Basic Information, Federal Section, Health Insurance, State Section, Summary/Print, E-file, Mailbox, Settings, and Save & Log Out. A large red arrow points to the "E-file" option in the navigation bar.

If you have viewed your return and ensured it is accurate, it is now time to file. In most cases, you can e-file your return.

Select e-file and continue through each part if it looks accurate.



The image shows a summary screen from the TaxSlayer mobile application. At the top, it says "Let's get a few more details" and "You're almost ready to file!" Below this, there are four sections: 1. Federal: Your tax liability is \$0 exactly. A \$0 tax liability means you do not owe any taxes and are not due a tax refund. 2. State: No State Returns. 3. Products & Services: Next, how do you want to pay for your fees associated with your return? A "CONTINUE" button is present. 4. Sign & File: The final step in the process.



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Payment/Refund Method

Federal Payment Method

How would you like to pay your federal amount due of **\$556?**



Direct debit



Mailed payment

I understand that TaxSlayer has no control over the IRS or the bank and therefore makes no guarantees as to the number of days it takes for you to receive your refund. TaxSlayer will make every effort to expedite your filing process; however, if the IRS delays or holds your refund, TaxSlayer will not be held responsible.

BACK

CONTINUE

Getting Ready to File

- It may ask you to add your ID. This section is optional.
- It will ask you if you filed taxes last year. If you did, it'll ask you to provide your Adjusted Gross Income (AGI) from last year. This will be on your 1040 from last year.

 Tip: If you do not have this info. You can create an account at <https://www.id.me/> to find past tax records.

- It will then ask you to create a 5-digit PIN number. It can be any 5 numbers you'd like.

Now, create a Self-Select PIN for this year

Create a 5-digit PIN for this year's tax return. We'll import it for you when you file next year.

*You may be asked for this PIN in the future so the IRS can confirm your identity. We recommend making note of your PIN and keeping track of it.

Taxpayer's 5-digit PIN *

CANCEL

CONTINUE

Direct Debit or Direct Deposit Information

Next, you will add your bank account and routing number in if you chose direct debit or direct deposit.

Bank Name	
<input type="text" value="Bank of America"/>	
Routing Number *	Bank Account Number *
<input type="text" value="*****"/>	<input type="text" value="*****"/>
Confirm Routing Number *	Confirm Bank Account Number *
<input type="text" value="*****"/>	<input type="text" value="*****"/>

Your Name Your Address	123	
PAY TO THE ORDER OF	\$ <input type="text"/>	
Your Bank	DOLLARS	
For		
012345678	1001001234	0123
ABA/Routing Number	Check Number	
Account Number		



Tip: enter these carefully. You can access your account and routing number on your mobile app, by calling the bank, or by looking at a check.

E-File Your Tax Return

Click E-File and you are finished!!

It will be **rejected** or **accepted** within a few minutes.

If it is **rejected**, you may be able to fix the error. See this site for help:

<https://www.taxslayerpro.com/blog/post/common-irs-error-reject-codes-and-suggested-solutions>

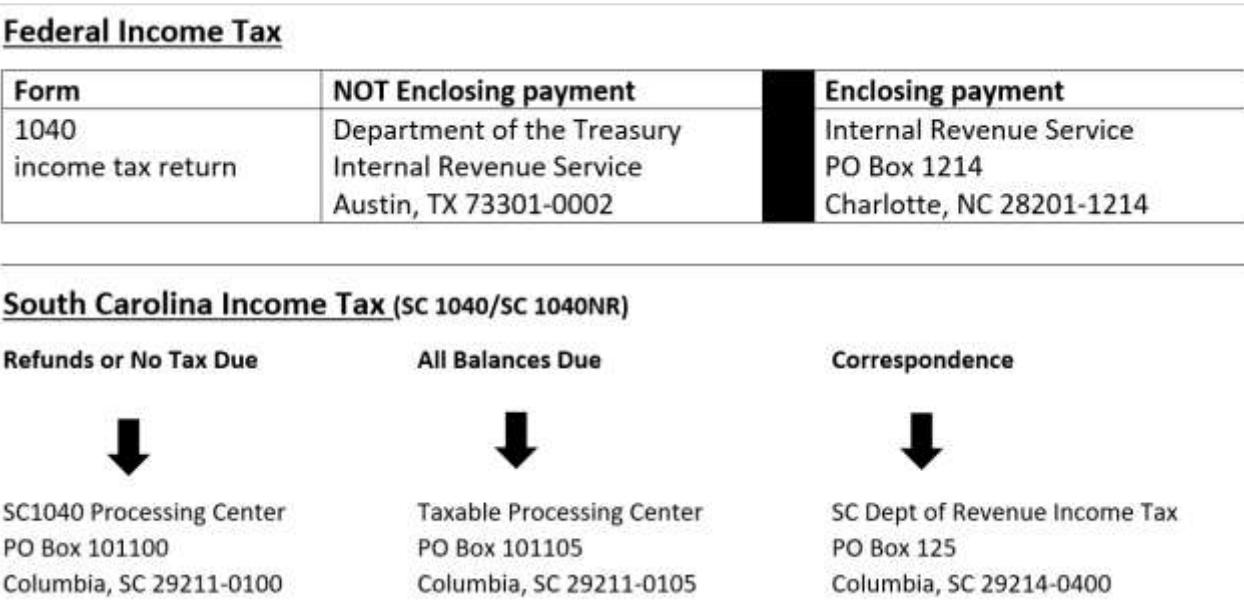
If you cannot, contact a VITA representative near you for assistance by calling 2-1-1.

If you still cannot fix it, you'll need to mail in your return. See the next page for assistance in mailing in a return.

Paper Filing (Mail Your Return)

Print 2 copies.

1. Mail one to the IRS for Federal Income Tax



2. Mail the second copy to South Carolina Department of Revenue for State Tax

Other Resources:

1. https://www.myfreetaxes.org/wp-content/uploads/2022/09/2023_MyFreeTaxesSelf-FilingGuide.pdf
2. <https://www.irs.gov/pub/irs-pdf/p4012.pdf>
3. <https://www.irs.gov/pub/irs-pdf/p17.pdf>
4. United Way of Pickens County
Michelle Lyons, Free File Manager
mlyons@uwpickens.org
864-826-8132