

Guide to Filing Your Own Taxes



UNITED WAY OF PICKENS COUNTY
FREE FILE

For US Residents

United Way
of Pickens County



Who this guide is for:

- U.S. Residents
- Annual 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

How would you like to file your taxes?

Select File My
Own 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)



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

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 2023 taxes).
- Are comfortable using tax software, or want to learn.

Note: if you made more than \$84,000 in 2024, this program will **not** be free of charge.

Did you earn less than \$79,000 in 2023?*

Yes

No

What is your ZIP code?*

Zip code

Do you have income from self-employment?*

Yes

No

Scroll down and select "File Now"

I would like to opt-in to be contacted by United Way (optional).

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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.

Create Your Account

Create your account.

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

Email address

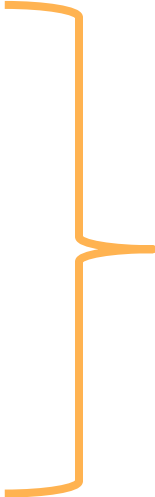
Username

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!

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

 MM DD YYYY

Occupation

BACK

[Skip](#)

CONTINUE

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.

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Personal Information

What's your mailing address?

Country

United States of America

Address (street number & name) *

Apartment (provide apartment number only)

ZIP code *

City, town, or post office *

State *

South Carolina

Residency Status *

- Please Select -

 Residency Status is required.

I have a stateside military address.

Personal Information

Tips:

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

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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.

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

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

CONTINUE

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.

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

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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

Select continue until you see this page:

If you have a W-2, select BEGIN. If not, skip this section.

W-2 *(Most Common Form)* [?](#)

Wages and tax statement

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.

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

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 *

Address (number and street) *

ZIP Code *

City *

State *

Form W-2

1 Wages, tips, other

3 Social security wages

5 Medicare wages and tips

7 Social security tips

9 IRS verification code

11 Nonqualified plans

12 [? Learn More](#)

a - Code

2 Federal tax withheld

4 Social security tax withheld

6 Medicare tax withheld

8 Allocated tips

10 Dependent care benefits

Unreported tips

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Income

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

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

BEGIN

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.

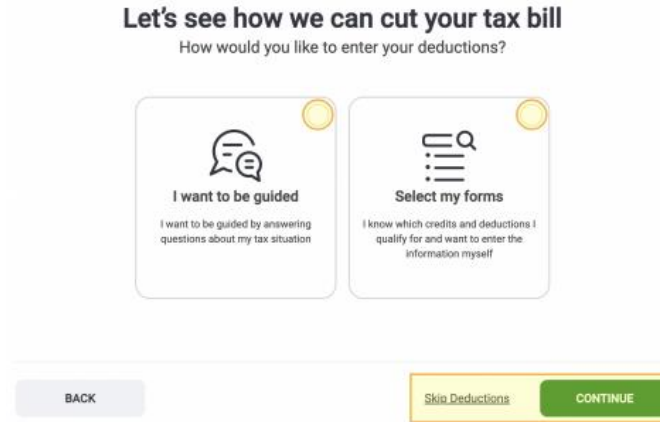
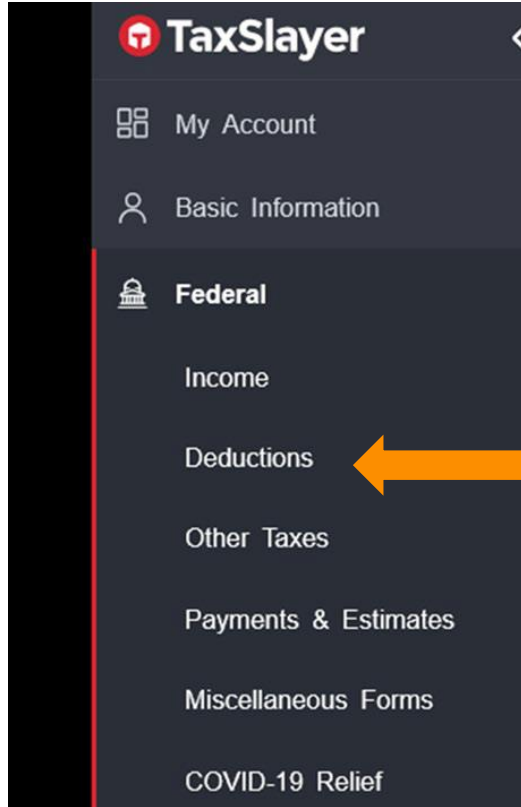
BEGIN

BACK

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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.

K-12 Teachers - complete applicable forms here

Former Students paying back college loans – complete applicable forms here

ADD/EDIT

Credits ?

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

Parents (or those with dependents), Students, Homeowners – complete applicable forms here

ADD/EDIT

Itemized Deductions ?

Charitable contributions, mortgage interest, property taxes, etc.

If you are itemizing – complete the applicable forms here.

BEGIN

Standard Deduction ?

Flat amount based on filing status

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

BEGIN

View Standard vs. Itemized Deductions ?

Compare your total deduction amounts

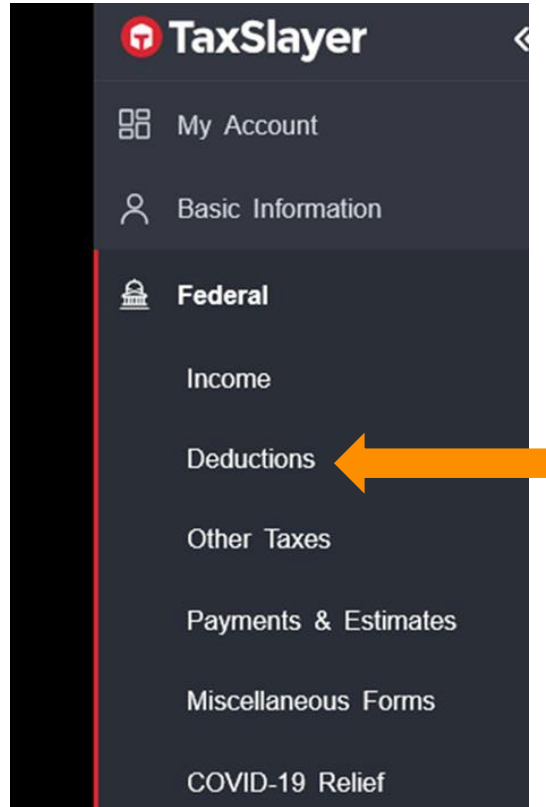
TIP: If you are unsure, go ahead and complete both sections. The system will tell you if it's more advantageous to take the standard deduction or itemize.

BEGIN

BACK

CONTINUE

Other Deductions



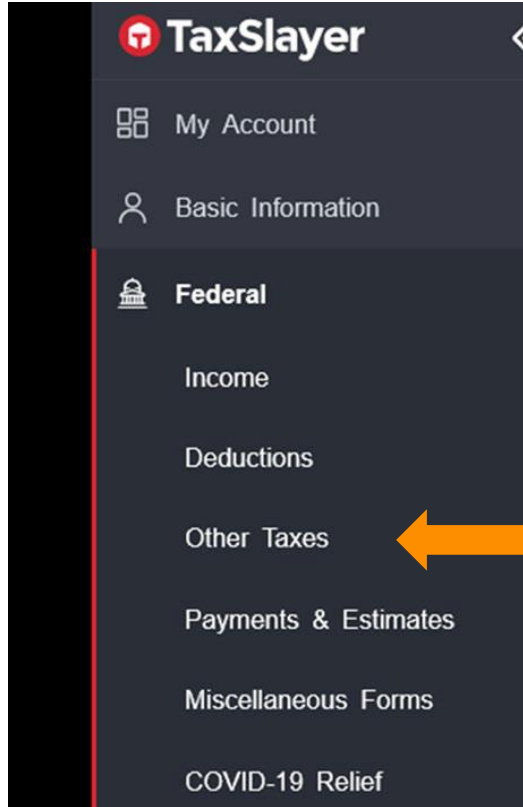
The next section will cover the following deductions:

- 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 6251

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

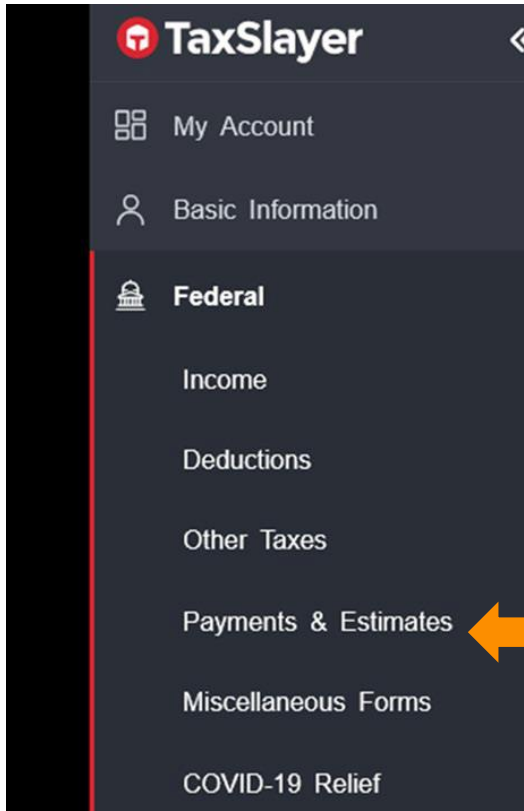
BEGIN

Self-Employment Tax

Reported on Schedule SE

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

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

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

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Miscellaneous Forms

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

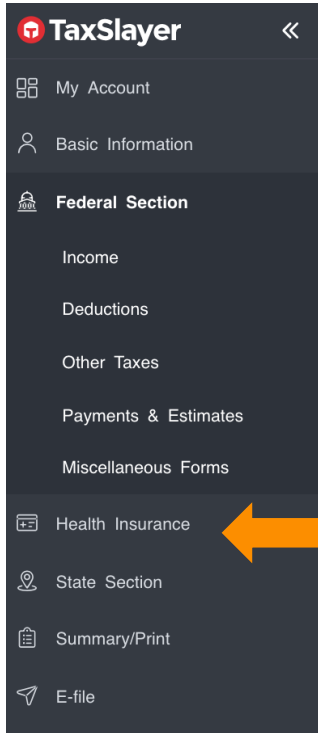
Other Miscellaneous Forms

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

TaxSlayer

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

Health Insurance



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

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 \$0.00

Add your state.

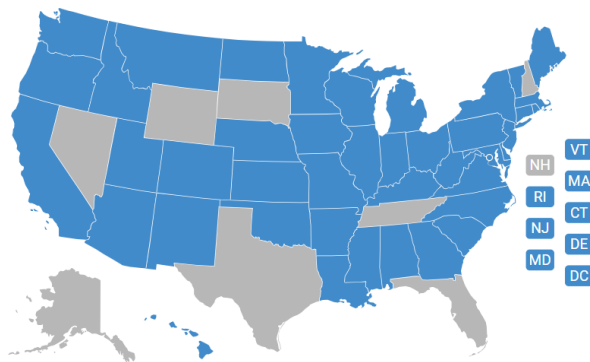
TaxSlayer <<

- My Account
- Basic Information
- Federal Section
- Health Insurance
- State Section**
- Summary/Print
- E-file
- 2019 Amended Return
- Mailbox
- Settings
- Toolbox
- Save & Log Out

[Skip state return](#)

GET STARTED

The following states **do not** have individual income tax returns:



Choose State *


- Please Select -

- NH
- VT
- RI
- MA
- NJ
- CT
- MD
- DE
- DC



State Return

2023 | AMERICAN PLEDGE

Help & Support 

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.

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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State Return

2023 | AMERICAN PLEDGE


South Carolina Return

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

[Help & Support](#) 

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

Select the County where you live

--Select-- 

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

BEGIN

CONTINUE

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State Return



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 AMV Credit

NO, CONTINUE

YES, ADD MORE ITEMS

If none of these apply, select No, Continue



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













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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 ▼

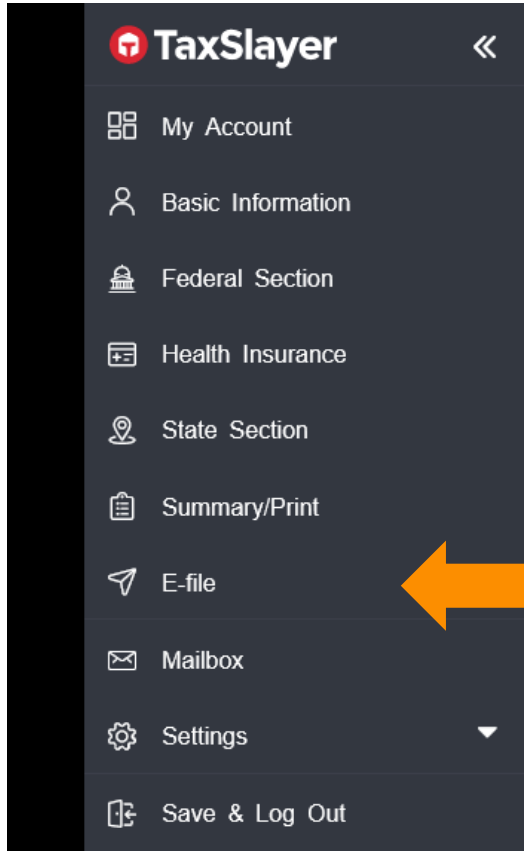
[VIEW RETURN](#)

Click "View Return" and save a copy for your files.

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Ready to File?



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.

Let's get a few more details

You're almost ready to file!

A screenshot of the tax filing summary screen. It shows a progress bar with four steps: 1. Federal, 2. State, 3. Products & Services, and 4. Sign & File. The first two steps are completed with green checkmarks and show a tax liability of \$0. The third step is the current step, showing a question about payment and a 'CONTINUE' button. The fourth step is not yet reached.

Step	Section	Amount
1	Federal	\$0
2	State	\$0
3	Products & Services	\$0
4	Sign & File	

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.



State
No State Returns.

Products & Services
Next, how do you want to pay for your fees associated with your return?
CONTINUE

Payment/Refund Method

Federal Payment Method

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

<input type="radio"/>  Direct debit	<input type="radio"/>  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

Select how you would like to receive your refund or how you would like to pay your tax.

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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 NR 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.

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

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

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

Print 2 copies.

1. Mail one to the IRS for
Federal Income Tax



Federal Income Tax

Form	NOT Enclosing payment	Enclosing payment
1040 income tax return	Department of the Treasury Internal Revenue Service Austin, TX 73301-0002	Internal Revenue Service PO Box 1214 Charlotte, NC 28201-1214

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



South Carolina Income Tax (SC 1040/SC 1040NR)

Refunds or No Tax Due



SC1040 Processing Center
PO Box 101100
Columbia, SC 29211-0100

All Balances Due



Taxable Processing Center
PO Box 101105
Columbia, SC 29211-0105

Correspondence



SC Dept of Revenue Income Tax
PO Box 125
Columbia, SC 29214-0400

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
Nicole Zeiset, Free File Manager
nzeiset@uwpickens.org
864-671-0059