



Free fillable forms e-File FAQs

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What You Need to Know Before Getting Started

What is a fillable form?

Fillable forms is an online version of the District's D-40 resident return and schedules. The fillable form version looks similar to the paper forms with the benefit of simple math calculations done for you. Residents can e-file the return when it is complete or the option exists for the fillable form to be mailed after printing.

When should I use a fillable form?

There are no age or income restrictions for using fillable forms. Fillable forms may be of benefit to you if you are not eligible for any of the free file options to complete your District individual income tax return.

What forms are supported by state fillable forms for the District?

The fillable forms program supports the following 2017 DC resident return and companion schedules:

- Form D-40 – Individual Income Tax Return
- Form D-40EZ – Short Individual Income Tax Return
- Schedule S – Supplemental Information and Dependents
- Schedule H – Homeowner and Renter Property Tax Credit
- Schedule U – Additional Miscellaneous Credits and Contributions
- Schedule I – Additions to and Subtractions from Federal Adjusted Gross Income
- Schedule N – DC Non-Custodial Parent EITC Claim
- Form D-40P – Payment Voucher

What forms are not supported by state fillable forms for the District?

- Standalone Schedule H
- D-40B, Non-Resident Request for Refund
- FR-127, Extension of Time to File Individual Income Tax
- D-40ES, Estimated Payment for Individual Income Tax
- Schedule ELC, Early Learning Tax Credit
- D-2210, Underpayment of Estimated Income Tax by Individuals
- D-41, Fiduciary Returns
- Deceased Taxpayer Returns
- Injured Spouse Taxpayer Returns
- Alternative Fuel Credits

- Any form with a foreign address
- Amended returns
- Part Year returns
- PDF attachments
- Prior year (any year other than 2018)

Are there any requirements to send documentation to the Office of Tax and Revenue after e-Filing my return?

No, you are not required to send documentation to the Office of Tax and Revenue after e-Filing your return.

Do I need to mail any forms to the DC Office of Tax and Revenue; for example, my Form W-2, Form W2-G, Form 1099-MISC or Form 1098?

No, if you e-File, you do not need to mail in forms, such as your W-2 or any other information statements but you are required to keep your supporting documentation for three years from the due date of the return. However, if you choose to print and file the paper return, you must include all W-2 forms and any other information statements.

Can I electronically file using state fillable forms if my address is in a foreign country?

No, you cannot use fillable forms if your address on Form D-40/D40EZ is in a foreign country. You will not be able to receive your refund via the U.S. Bank ReliaCard™ or direct deposit or pay your tax due through direct debit if your bank account is with a foreign bank.

How will I receive my refund?

There are three options for receiving individual income tax refunds – direct deposit, the ReliaCard card or paper check. All individual income tax returns will require that an option be selected. If you do not select an option, you will receive the ReliaCard. However, refunds under \$2 or greater than \$4,000 do not qualify for the tax refund card and will be issued by check.

All new direct deposit requests (taxpayers requesting a direct deposit for the first time including new filers) will receive a paper check.

When will I get receive my refund?

The fastest way to get your refund is by e-Filing your return and using direct deposit. If you e-File but prefer the U.S. Bank ReliaCard™, you can expect your refund within two weeks. If you print and file a paper return it will take longer. Any return filed that has errors will delay processing of the refund.

You can get tax return refund information through the District’s Office of Tax and Revenue’s - www.MyTax.DC.gov website page, under “Where’s My Refund?”, or by calling (202) 727-4TAX with a touch tone phone. You can check the status of your refund 24/7. You will need to enter two information items from your e-Filed return:

- Your Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN).
- The exact whole dollar amount of your expected refund.

If I have a balance due and can't pay right now, is there a payment plan available?

Paying your taxes in full and on time avoids unnecessary penalties and interest. However, if you cannot pay your taxes in full, file your return without the payment. When you receive a bill for the tax due from the Office of Tax and Revenue, visit the website for instructions.

How do I pay a balance due?

You currently have different options for paying a balance due for your DC state return:

- By direct debit - if you e-File your return you can choose to use the direct debit method. Fill in the required information on the e-Filing worksheet. You cannot use direct debit if the funds are from a financial institution outside of the United States. **NOTE: you can schedule your payment as long as it does not exceed 15 days from the deadline date of filing your return.**
- By credit card - if you print and mail your return, you can still pay via Quick Payments on our website www.MyTax.DC.gov
- By check - mail a check with a D-40P, Payment Voucher directly to:

*Office of Tax and Revenue
P.O. Box 96169
Washington, DC 20090-6169*

I received an email from the DC Office of Tax and Revenue with an error code. What does the error code mean? How do I go about correcting the errors?

e-Filed returns can reject for a variety of reasons. If your return is rejected by the DC Office of Tax and Revenue, it means it has not been filed. It's important to resolve the issue that caused the rejection. Then you can e-File again. If you can't resolve the issue or choose not to e-File, you need to print the return and file it by mail. For more information about where you should mail your District return, access the DC Office of Tax and Revenue website.

How To Get Help

If I have a tax law question, or questions regarding filling out my tax return, what can I do?

- Refer to the D-40/D-40EZ forms and instructions on the OTR website at the [Office of Tax and Revenue](http://www.MyTax.DC.gov).
- Call Customer Service toll-free, at (202) 727-4TAX or email taxhelp@dc.gov.

Top Reason Why Customers Receive Reject X0000-005

“Business Rule X0000-005 – Document does not pass the schema validation.”

When this Business Rule is displayed, it means you must correct information that you entered into the fillable form D-40 or D-40EZ and also complete missing information that was not entered.

Review the list below. Make sure all information is correct and complete.

1. Missing Address – The customer’s address must be entered.

2. Zeroes Present in Wrong Fields – Do not enter all zeroes in the Code and Amount fields. If an amount is claimed, then the matching code must be entered. Zero is not a Code.

- Other Additions
- Other Subtractions
- Other Deductions
- Voluntary Contributions

3. Missing Employer Information on W-2

- EIN (Employer Identification Number)
- Employer Name
- Employer Address

4. Missing Employee Information on W-2

- Employee Name
- Employee Address

5. Invalid Refund Information

- Invalid data was entered in the State Payment Information Section of a refund return.
- For refund returns, select one of the following three options: (1) direct deposit (2) RelicCard or (3) paper check. If nothing is selected, the default will be ReliaCard.

6. Invalid Refund Direct Deposit Information

- Invalid data was entered in the Refund Direct Deposit Section of a tax due return.
- For tax due returns, only State Payment information is required.

7. Missing DC deduction type (Standard or Itemized) or amount.