



# DCfreefile Frequently Asked Questions (FAQs)

## 1. What is DCfreefile?

DCfreefile is a free federal and state income tax preparation and electronic filing program for eligible taxpayers, developed through a partnership between groups of private sector tax software companies. Eligible taxpayers may prepare and e-file their federal and state income tax returns for free using commercial online software provided by specific DCfreefile vendors. If you are filing married filing jointly, the Adjusted Gross Income (AGI) criteria apply to the AGI for both of you combined.

## 2. Who is eligible for DCfreefile?

Each participating vendor sets its own eligibility requirements and not all taxpayers will qualify for all companies.

## 3. Which District returns can be submitted through DCfreefile?

Returns that can be e-filed and supported by some vendors include:

- D-40/D40EZ – Individual Income and applicable schedules (S, H, U, I, N) for Tax Year 2015 - 2017
- FR-127 – Extension of Time to File a DC Income Tax Return for Tax Year 2017
- D-40ES – Estimated payment for Individual Income Tax for Tax Year 2018
- Amended Return for Tax Years 2015 - 2017
- Prior year returns(Tax Year 2015 & 2016)

Returns that cannot be e-filed include:

- Non-Resident Request for Refund returns (D-40B)
- Standalone Schedule H
- Any year prior to 2015

Reminder, extension requests are to allow more time to file, NOT TIME TO PAY. DCfreefile software will allow you to pay your taxes, extension or estimated payments through an Electronic Funds Transfer (EFT) debit. You identify your bank account information and the date

you request OTR to withdraw the funds. After the due date, you can ONLY choose the current date, except for estimated payments. However, if you do not want to pay electronically, you may e-file your return and mail a paper check or money order for your payment. DC also offers individuals the ability to pay by e-check or credit card. Visit our website, [www.MyTax.DC.gov](http://www.MyTax.DC.gov) for more details.

**4. If I choose to use a preparer can I still file electronically?**

Yes, most tax preparers are authorized to e-file your return for you. Please let your tax preparer know that you want to e-file. Be sure to view and print your return before transmittal.

**5. Can I file domestic partnership jointly or separately through DCfreefile?**

You can prepare a mock federal return to prepare and submit your District return using TaxSlayer or TurboTax. The IRS does not recognize a domestic partnership filing status; this is why a mock return will need to be prepared.

**6. Can I file jointly if same-sex marriage?**

On August 29, 2013, the U.S. Department of the Treasury and the Internal Revenue Service ruled that same-sex couples, legally married in jurisdictions that recognize their marriages, will be treated as married for federal tax purposes. Same-sex couples will be treated as married for all federal tax purposes, including income and gift and estate taxes. The ruling applies to all federal tax provisions where marriage is a factor, including filing status, claiming personal and dependency exemptions, taking the standard deduction, employee benefits, contributing to an IRA and claiming the earned income tax or child tax credits.

**7. I used one of the commercial vendors in a prior year, do I have to set up a new user name?**

It depends on each vendor's policy.

**8. How do I know if my return was submitted or has been accepted?**

Each vendor's product will send an email directly to the taxpayer.

**9. When should I receive my refund?**

You should receive your District refund in 7-10 business days after submitting through e-file, if there were no errors on your return.

## 10. What are the refund options?

There will be three options for receiving individual income tax refunds – direct deposit, a tax refund 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 a tax refund card. However, refunds under \$2 or greater than \$4,000 do not qualify for the tax refund card and will be issued by check.

A refund paper check will be issued if:

- the taxpayer selects this option, or direct deposit is not selected, or the tax refund card is beyond the threshold for a refund card;
- taxpayer is a first time filer, even if they select direct deposit;
- there is a gap between filing i.e., filed in 2014 and 2015, but did not file in 2016; or
- the bank account changes from one year to the next.

## 11. Where do I go for help if I have questions with the e-file software?

Check the company's website for customer service options such as online assistance or an email address for technical and/or tax law assistance.

## 12. I bought tax preparation software at a store. May I use DCfreefile to file it for free?

No. Store-bought programs cannot be used in conjunction with the DCfreefile program. Online returns must be prepared and filed through the specific website provided by the DCfreefile vendor on the District Tax website.

## 13. I have already filed my federal return, can I e-file my District return?

Yes. If you have already filed your federal return, you can e-file just your District return for free with some vendors; however, since the state return is created from information on the federal return, you will need to complete a second federal return on the site selected, but **DO NOT FILE THE FEDERAL RETURN**. File the District return as State Only. You must e-file both your federal and state return at the same time with their product in order to obtain the DCfreefile offering.

## 14. Do I still need to send you my W-2 or 1099 statements?

No. You will enter all the pertinent information from your W-2 or 1099 statements into whichever e-file software you decide to use. Retain all paper copies of W2 or 1099 statements with your tax records.

## 15. How do I get started?

Review our list of DCfreefile vendors and their specific eligibility criteria. If you go directly to the IRS website to access a Free File vendor, you may select one that DOES NOT support free e-file of the District return. Please select a product from our DCfreefile page to assure yourself the opportunity to e-file both your federal and District returns.

Determine if you qualify for DCfreefile and select your vendor. After choosing a company, click on the company's name, which will send you directly to that company's website (you will be notified that you are leaving the District site and being sent to a commercial website).

You will start the process by preparing your federal return first followed by your District return.

If you determine after you start preparing your tax return with a particular company that you are not eligible for that company's DCfreefile service and you will be subject to a fee, you have the following options:

- Return back to our site and review the list of DCfreefile vendors again and select another company that you may qualify for, or
- Continue completing your return and pay the e-file fee.