



# Free Fillable Forms e-File FAQs

## What You Need to Know Before Getting Started

### **What is a fillable form?**

A fillable form is an online version of a paper form. The fillable form version of the District's D-40 resident return and schedules has a similar look to the paper version, with the benefit of simple math calculations done for you. Residents can e-File the return when it is completed or decide to print and mail in the completed fillable form.

### **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 2020 DC resident return and companion schedules:

- Form D-40 – 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
- Schedule HSR – DC Health Care Shared Responsibility
- Form D-40P – Payment Voucher

NOTE: If claiming the Opportunity Zone Benefit on Schedule I, Lines 8 or 15, you must file by paper.

### **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 I, Line 8 and Line 15
- Schedule ELC – Keep Child Care Affordable Tax Credit (formerly Early Learning Credit)
- DC-8379 – Injured Spouse Allocation
- 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 binary attachments
- Prior year (any year other than 2020)

### **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 (OTR) after e-Filing your return. However, you may be asked to provide supporting documentation after your return has been processed.

### **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 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, U.S. Bank ReliaCard™ or paper check. All individual income tax returns will require that an option is selected. If you do not select an option, you will receive U.S. Bank ReliaCard™. However, refunds under \$2 or greater than \$4,000 do not qualify for U.S. Bank ReliaCard™ and will be issued by paper 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 2017 and 2018, but did not file in 2019; or
- the bank account changes from one year to the next.

### **When will I receive my refund?**

On average, you should receive your District refund within six weeks after submitting

through e-File, if there were no errors on your return.

The fastest way to get your refund is by e-Filing your return and using direct deposit. 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 view your refund status by visiting OTR's online portal, [MyTax.DC.gov](https://MyTax.DC.gov) "Where's My Refund?", or by calling OTR's e-Services Unit at (202) 759-1946. You can check the status of your refund 24/7. A refund status is provided only for a return filed within the last six months. You will need to enter the following information 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, visit [MyTax.DC.gov](https://MyTax.DC.gov) for further information.

### **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 30 days from the deadline date of filing your return.**
- By credit card - if you print and mail your return, you can still pay on our web portal, [MyTax.DC.gov](https://MyTax.DC.gov)
- By check or money order (US dollars) - mail your payment 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 be rejected for a variety of reasons. If your return is rejected by OTR, it means that it has not been filed. It's important to resolve the issue that caused the rejection and refile your return. Please see the next page for most common errors. 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, visit our website,

[https://otr.cfo.dc.gov/sites/default/files/dc/sites/otr/publication/attachments/MailingAddresses%20for%20Tax%20Returns\\_051619.pdf](https://otr.cfo.dc.gov/sites/default/files/dc/sites/otr/publication/attachments/MailingAddresses%20for%20Tax%20Returns_051619.pdf).

## **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 forms and instructions on the OTR website.
- Call OTR's e-Services Unit at (202) 759-1946.

## **Top Reasons Why Customers Returns Are Rejected**

### **X0000-005**

When this Business Rule error is displayed, it means you must correct information that you entered into D-40 and/or also complete any missing information that was not entered.

Below is the list of most common errors. Make sure all information is correct and complete.

#### **1. Missing Employer Information on W-2**

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

#### **2. Missing Employee Information on W-2**

- Employee Name
- Employee Address

#### **3. 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) U.S. Bank ReliaCard™, or (3) paper check.

#### **4. 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.

#### **5. Missing DC deduction type (Standard or Itemized) or amount.**

#### **6. Missing DC Earned Income Tax Credit**

- If you entered any amount on lines 26c, 26d or 26e to claim DC Earned Income Tax Credit, make sure you entered the number of qualified EITC children on line 26a and your earned income amount on line 26b.

- If you did NOT claim DC Earned Income Tax Credit, Lines 26a and 26b should be left blank with no entry. Even a “zero” cannot be entered.

**7. Schedule S, Calculation G-1 (DCD40-0071)**

When this Business Rule error is displayed, it means your D-40 did not pass one of our internal validations regarding Schedule S, Calculation G-1. If you selected Standard Deduction on D-40, Line 16, please make sure you complete Schedule S, Calculation G-1, unless you are a dependent claimed by someone else.