

A Step-By-Step Guide to Filing Your Own Taxes

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Advocates
for Youth

2024 TAX SEASON



ABOUT THIS GUIDE

The purpose of this guide is to walk you through the process of filing your taxes from beginning to end for free using the **TaxSlayer's free filing site, www.MyFreeTaxes.org.**

Self-filing is a good option for young adults who:

- are filing the most recent year tax return (2023),
- are comfortable using online tax software,
- want to learn how to file on their own, and
- have earned less than \$73,000 in 2023.

Not sure about self-filing? If you don't believe self-filing is the best option for you, there are Volunteer Income Tax Assistance (VITA) sites you can visit for free one-on-one assistance from a certified volunteer tax preparer. Use this roster to identify a VITA site:

<https://jbay.org/resources/fy-vita-sites/>



NEW!

This is the second year that current and former foster youth may claim the **California Foster Youth Tax Credit (FYTC) worth up to \$1,117 in 2024.**

For more info on eligibility and how to claim this credit, please see “STEP SEVEN: Prepare your California State Tax Return” beginning on slide 37.

STEP ONE

Create an account with
[MyFreeTaxes.org](https://www.myfreetaxes.org)



STEP 1


- Go to [MyFreeTaxes.org](https://www.myfreetaxes.org)
- Click **FILE ON MY OWN.**
- **Scroll** to enter your contact information.
- Click **GET STARTED FILING.**


The screenshot shows the homepage of my free Taxes.org, a service provided by United Way of California. The page features a blue header with the organization's logo and navigation links for 'SEARCH' and 'LANGUAGE'. The main content area has a large blue banner with the text 'File your taxes for free' and a sub-message: 'United Way is here to help you move up financially. Get started to access new tax credits for your family.' Below this banner are three white boxes, each with an icon and a title: 'File on my own (quick and easy)' (with a computer icon and a red arrow pointing to it), 'File with virtual help' (with a smartphone icon), and 'Schedule in-person help' (with a speech bubble icon).

This screenshot shows a contact information form with a yellow header that reads: 'Before you start: You'll need to have a few documents to file. Complete this checklist to be prepared to file.' The form includes several input fields: 'What's your full name?' with sub-fields for 'First' and 'Last'; 'Your email address?' with the placeholder 'name@example.com'; 'Your phone number?' with the placeholder '(xxx) xxx-xxxx'; and 'Your zip code?' with the instruction 'Enter 5 digit zip code here...'. There is a checkbox for 'Would you like to sign up to receive resources about other credits, benefits, and services by email or text?' with 'Yes' selected. A blue 'GET STARTED FILING' button is at the bottom, highlighted with a yellow border and a red arrow. A 'Questions?' link is in the bottom right corner. The URL 'https://www.myfreetaxes.org/resource/tax-prep-checklist/' is visible in the bottom left.

STEP 1

- If you aren't automatically redirected to a form, click the **orange button** that says it will redirect you.
- Answer **YES** you earned less than \$73,000 in 2023.
(If you earned more than \$73,000 you are not eligible to self-file with MyFreeTaxes.org and should use an alternate tax filing method).
- Enter your **zip code**, and select that you are **not a resident of Puerto Rico**.
- Click **FILE NOW**.


You should have been redirected to **MyFreeTaxes.com** for the next step to filing your taxes. If the new window doesn't open, click here. 



File your taxes for free.
Get the assistance you need.
Seriously.

MyFreeTaxes helps people file their federal and state taxes for free, and it's brought to you by United Way.

ABOUT
FAQ
NEWSLETTER SIGN-UP
TAX TIME FINANCIAL CHECKLIST
PARTNER PORTAL
PRIVACY POLICY
SUPPORTERS
VOLUNTEER



By myself

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.

Did you earn less than \$73,000 in 2023?*

Yes No

What is your ZIP code?*

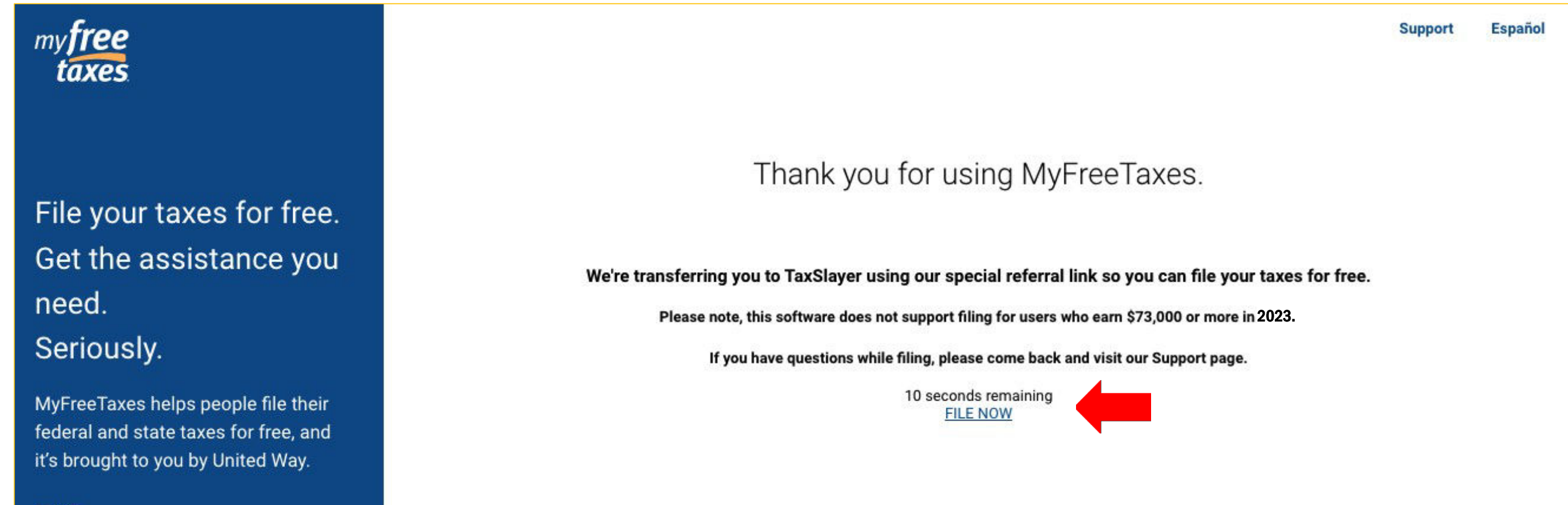
Are you a resident of Puerto Rico?*

Yes No

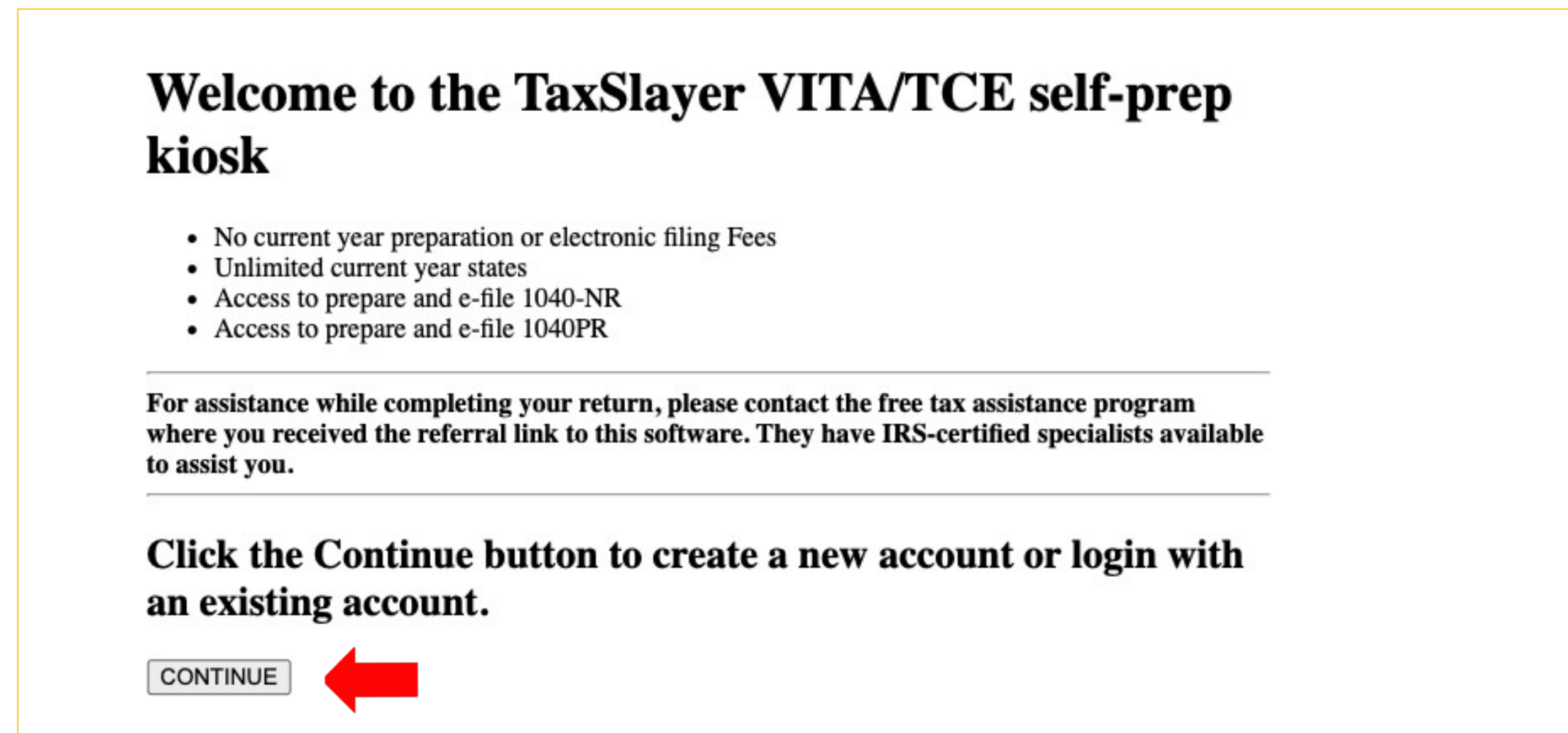
I would like to opt-in to be contacted by United Way (optional).

STEP 1

- You will now leave the MyFreeTaxes.org page and be **directed to the TaxSlayer VITA/TCE self-prep kiosk** page.
- Click **FILE NOW**.
- Click the **CONTINUE** button to create a TaxSlayer Account.
- Go on to **Step 2**.



The screenshot shows the MyFreeTaxes.org website. On the left is a dark blue sidebar with the 'myfree taxes' logo and text: 'File your taxes for free. Get the assistance you need. Seriously. MyFreeTaxes helps people file their federal and state taxes for free, and it's brought to you by United Way.' The main content area is white and contains: 'Thank you for using MyFreeTaxes.', 'We're transferring you to TaxSlayer using our special referral link so you can file your taxes for free.', 'Please note, this software does not support filing for users who earn \$73,000 or more in 2023.', 'If you have questions while filing, please come back and visit our Support page.', and a '10 seconds remaining' timer with a 'FILE NOW' link. A red arrow points to the 'FILE NOW' link.



The screenshot shows the TaxSlayer VITA/TCE self-prep kiosk. It features a heading: 'Welcome to the TaxSlayer VITA/TCE self-prep kiosk'. Below this is a bulleted list of benefits: 'No current year preparation or electronic filing Fees', 'Unlimited current year states', 'Access to prepare and e-file 1040-NR', and 'Access to prepare and e-file 1040PR'. A horizontal line separates this from a paragraph: '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.' Another horizontal line follows. Below that is the instruction: 'Click the Continue button to create a new account or login with an existing account.' At the bottom, there is a 'CONTINUE' button with a red arrow pointing to it.

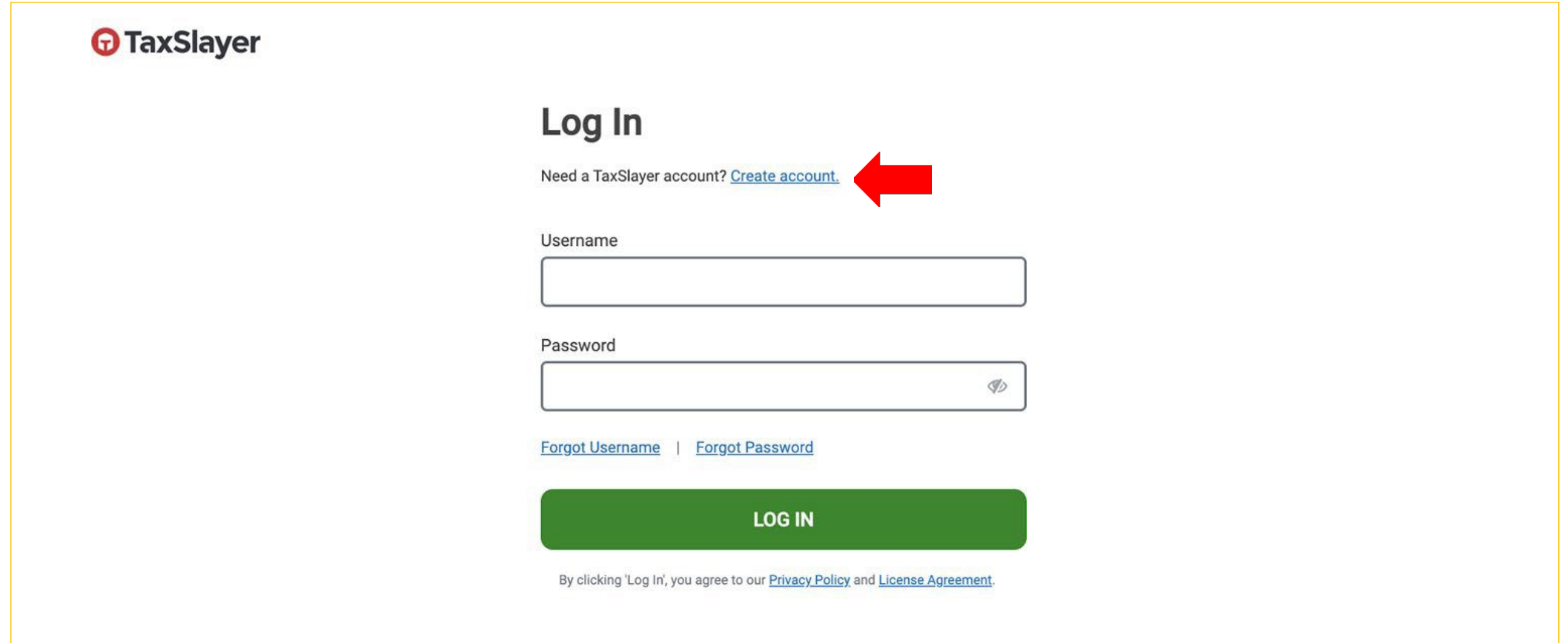
STEP TWO

Create an account with "TaxSlayer,"
the free IRS self-filing website.



STEP 2

- Click **CREATE ACCOUNT**.
- Fill out the information needed for a TaxSlayer Account.
- **NOTES:**
 - **Important:** Save your username and password in a secure place with your tax documents.
 - You can log in and out of your tax account as you work on your return.
 - You do not need to enter all the information at one time.
- Click **CREATE ACCOUNT**.



TaxSlayer

Log In

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

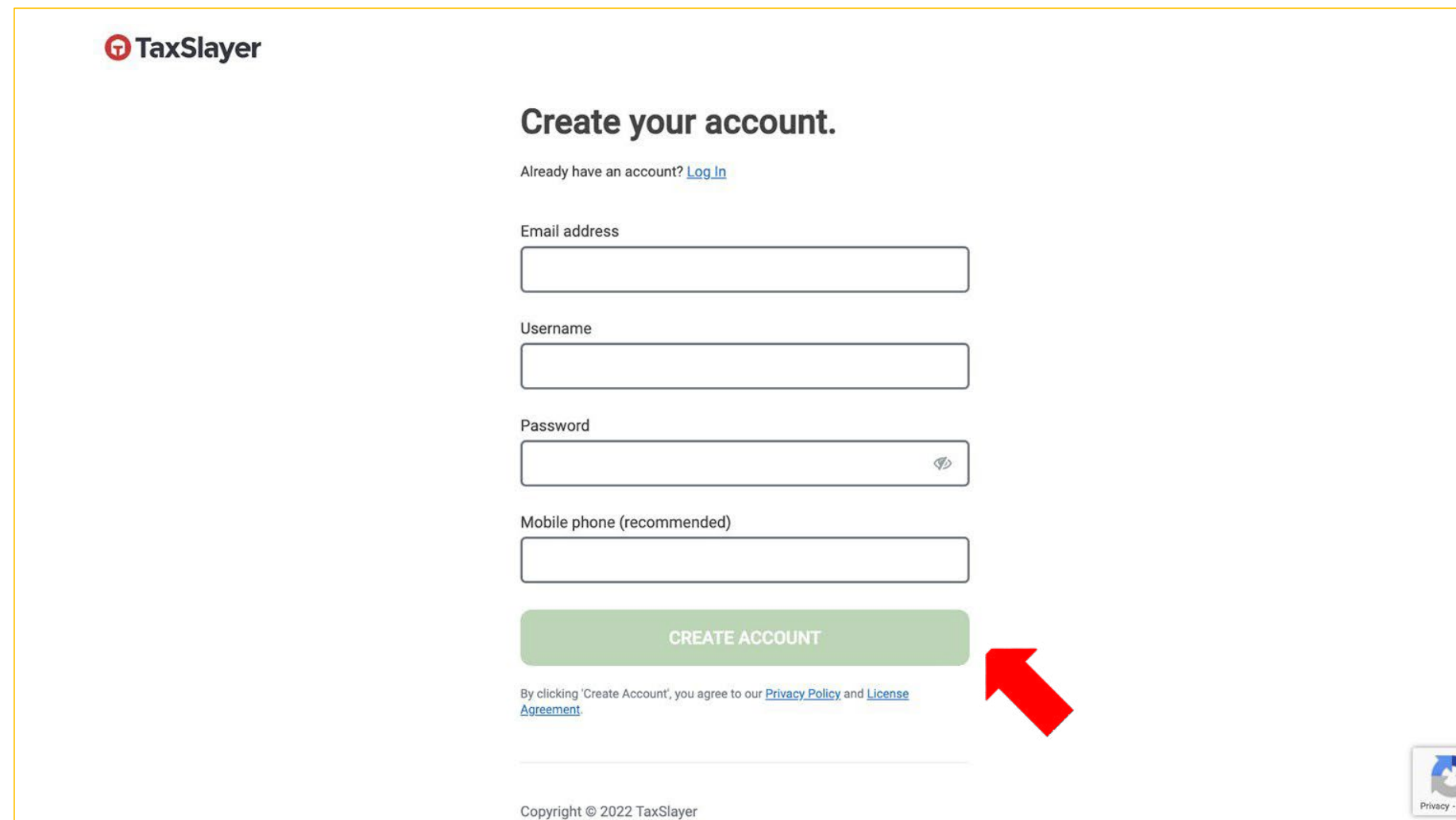
Username

Password

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

LOG IN

By clicking 'Log In', you agree to our [Privacy Policy](#) and [License Agreement](#).



TaxSlayer

Create your account.

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

Email address

Username

Password

Mobile phone (recommended)

CREATE ACCOUNT

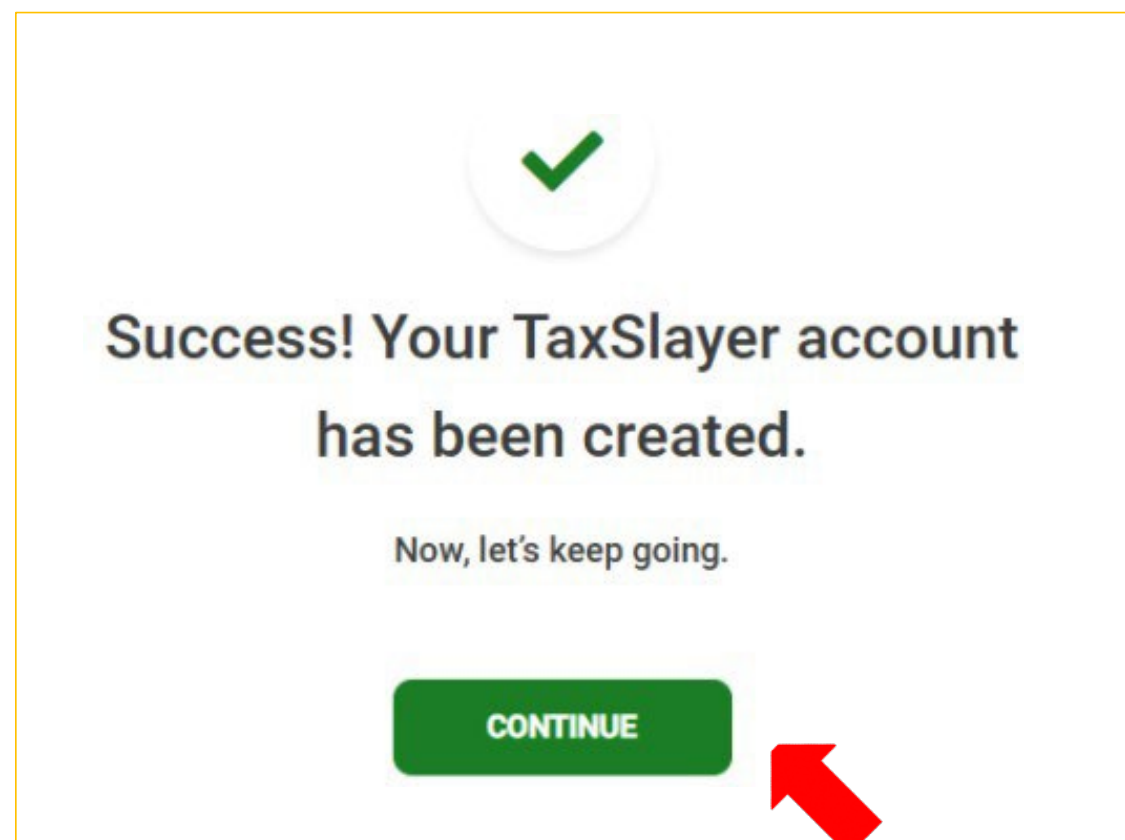
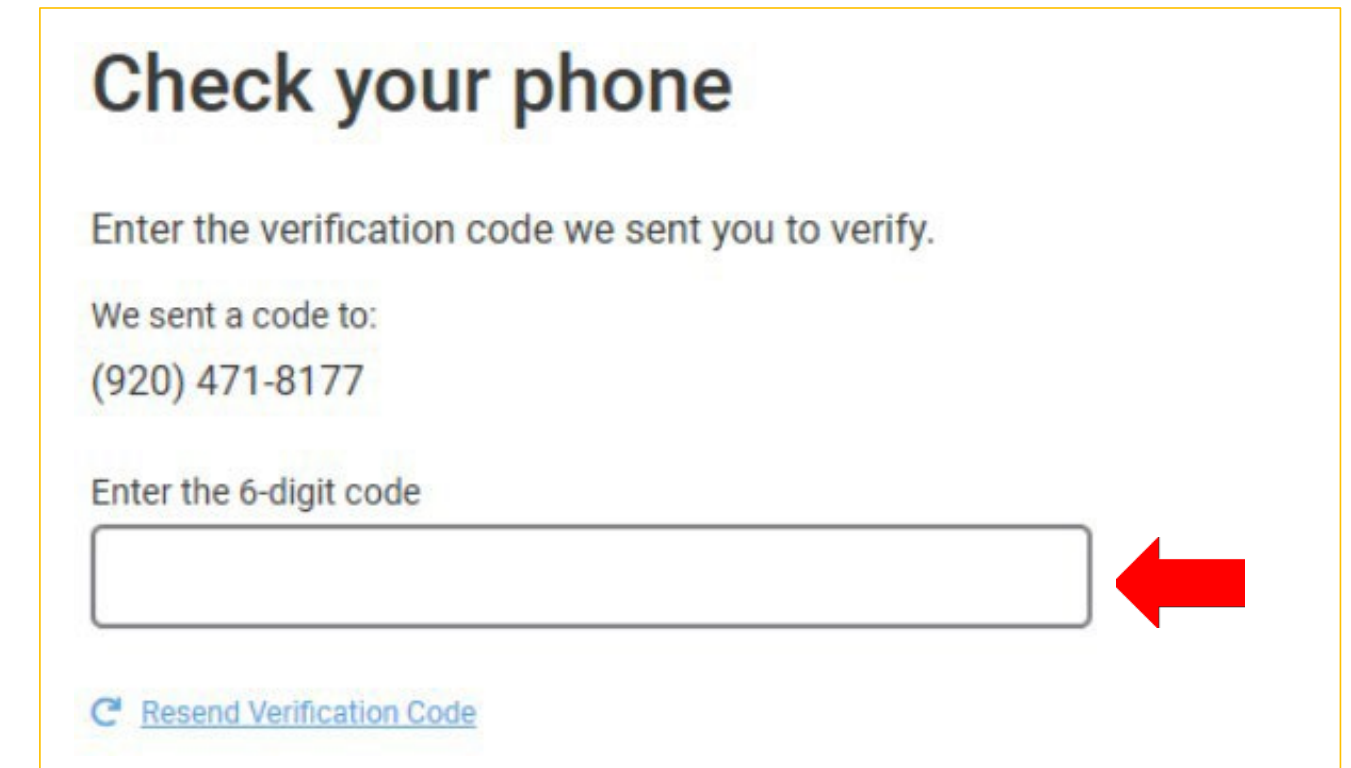
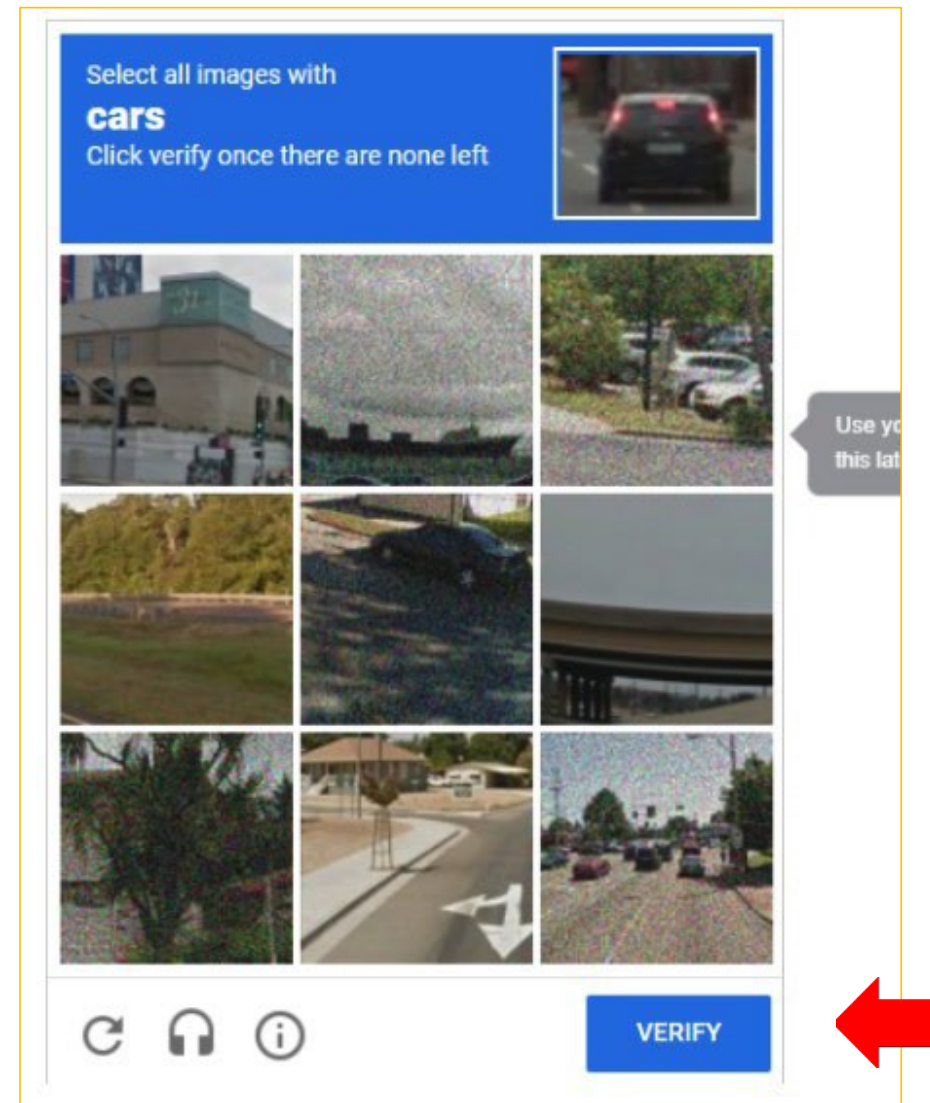
By clicking 'Create Account', you agree to our [Privacy Policy](#) and [License Agreement](#).

Copyright © 2022 TaxSlayer

[Privacy - Terms](#)

STEP 2

- *If prompted* - complete the captcha.
- Enter the security code sent to your phone number, then click **VERIFY**.
- After you verify your account, you will receive a message that your account is created. Click **CONTINUE** to begin your 2023 tax return.



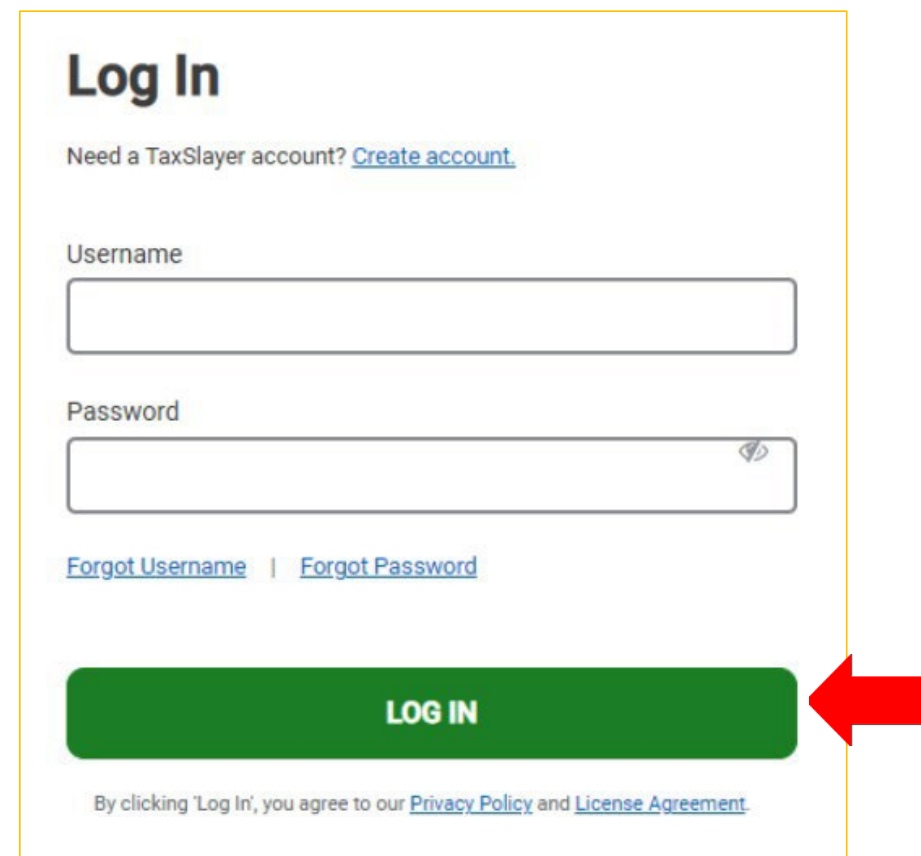
STEP THREE

Login to TaxSlayer and begin self-filing your 2023 tax return, beginning with entering your personal information.



STEP 3

- Login to TaxSlayer using your username and password.
- Type your **full name** into the box.
- If you are **married and filing jointly: check the box.**
- If you are **not married: leave the checkbox blank.**
- Click **CONTINUE.**



Log In

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

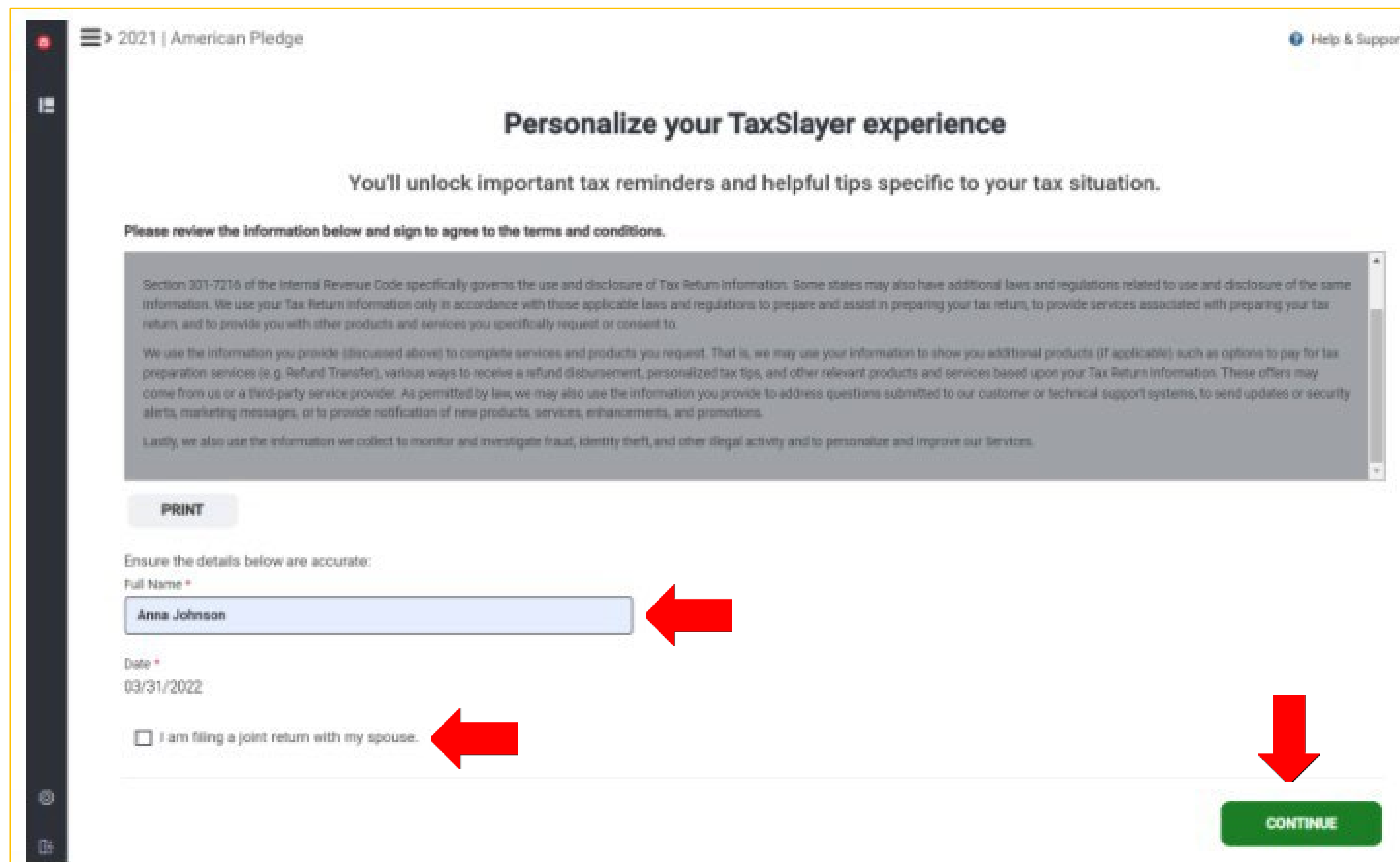
Username

Password

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

LOG IN

By clicking 'Log In', you agree to our [Privacy Policy](#) and [License Agreement](#).



2021 | American Pledge Help & Support

Personalize your TaxSlayer experience

You'll unlock important tax reminders and helpful tips specific to your tax situation.

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

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.

We use the information you provide (discussed above) to complete services and products you request. That is, we may use your information to show you additional products (if applicable) such as options to pay for tax preparation services (e.g. Refund Transfer), various ways to receive a refund disbursement, personalized tax tips, and other relevant products and services based upon your Tax Return information. These offers may come from us or a third-party service provider. As permitted by law, we may also use the information you provide to address questions submitted to our customer or technical support systems, to send updates or security alerts, marketing messages, or to provide notification of new products, services, enhancements, and promotions.

Lastly, we also use the information we collect to monitor and investigate fraud, identity theft, and other illegal activity and to personalize and improve our services.

PRINT

Ensure the details below are accurate:

Full Name *

Date *
03/31/2022

I am filing a joint return with my spouse.

CONTINUE

STEP 3


- If you have **last year's tax return** you can upload it and click **VIEW RESULTS**.
- If not, click **SKIP**.
- Type in your personal info: *

IMPORTANT

Enter your personal information exactly as it is written on your Social Security Card or Individual Taxpayer Identification Number. Be sure to double check spelling and numbers.

Want to get a head start on your Tax Return?

Easily import your personal information by uploading a pdf of last year's tax return.
In order to upload your last year's tax return, be sure that the PDF is not password protected.



Drag and Drop PDF here, or
click to upload

You may upload 1 PDF file (up to 5 MB).

[Skip](#) [VIEW RESULTS](#)

Personal Information

Taxpayer's Information

Primary taxpayer first name MI

Last name Suffix (Jr, Sr, etc.)

SSN The IRS requires your Social Security Number for e-filing.*
 - -

Date of Birth
MM DD YYYY

Occupation

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

STEP 3

- Enter your **mailing address**.
- **If you do not have a mailing address**, ask a shelter, clinic, or youth center (that you could retrieve mail from) to use their address, and enter that information.
- For residency status:
 - If you lived in California the whole year, select **FULL-YEAR RESIDENT OF THIS STATE**.
 - If you moved to California in 2024 and lived in a different state in 2023, select **FULL-YEAR RESIDENT OF ANOTHER STATE**.
 - If you lived in multiple states, select **PART-YEAR STATE RESIDENT**.

Personal Information

What's your mailing address?

Country
United States of America

Address (street number & name)

Apartment (provide apartment number only)

ZIP code

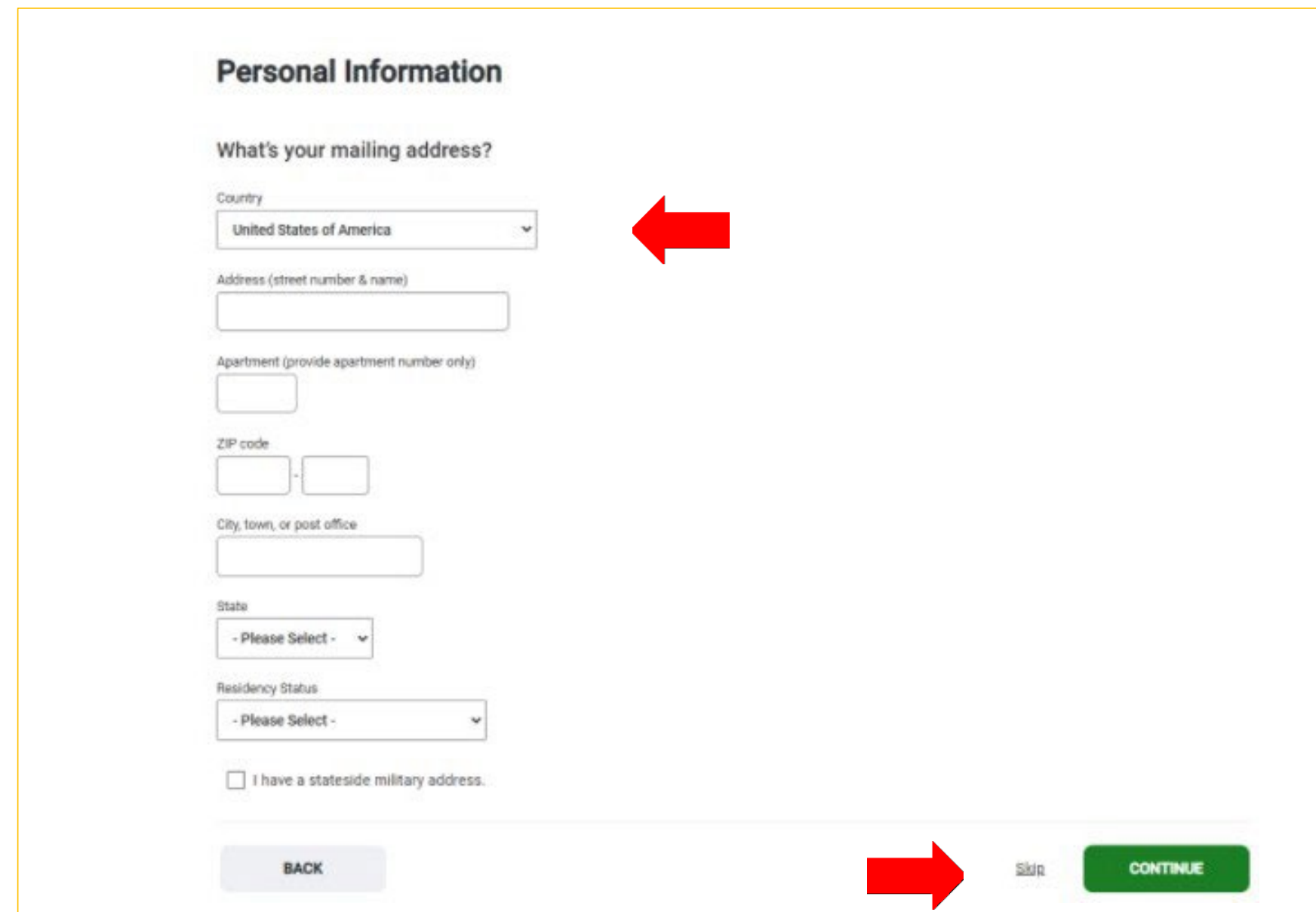
City, town, or post office

State
- Please Select -

Residency Status
- Please Select -

I have a stateside military address.

BACK Skip CONTINUE



Residency Status *

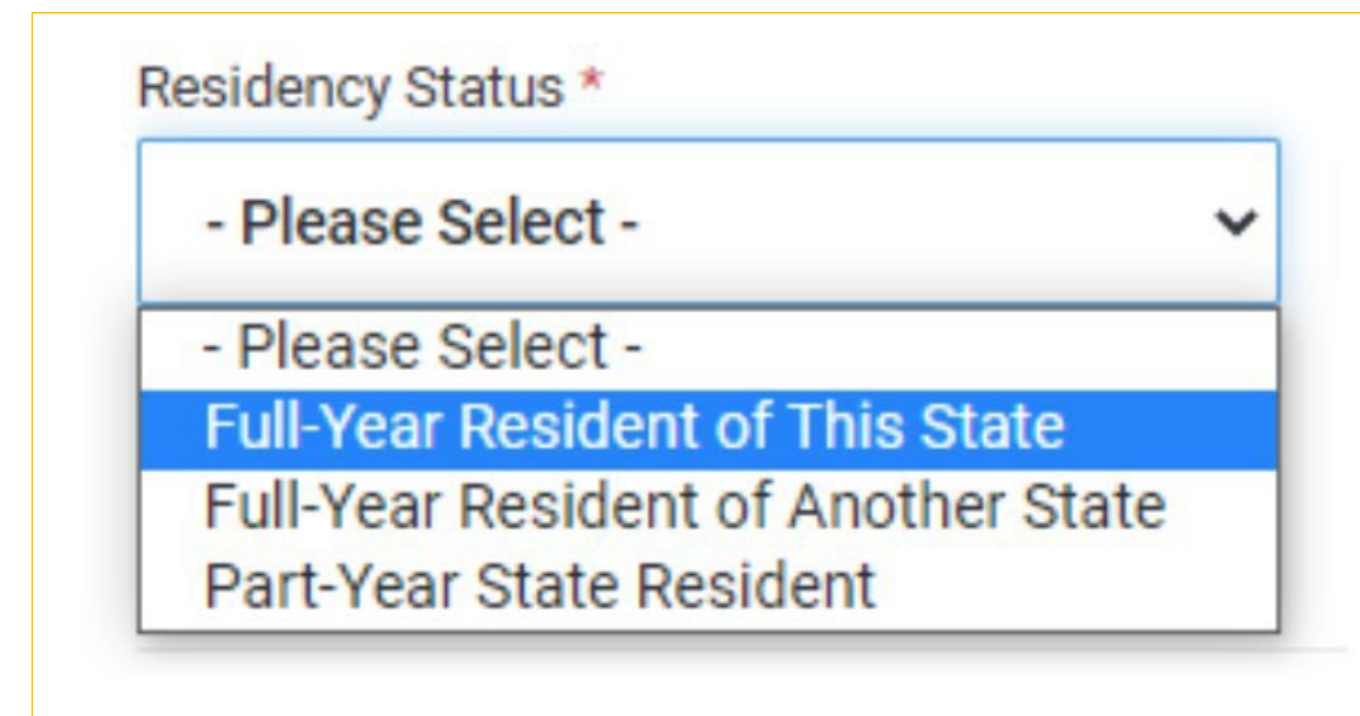
- Please Select -

- Please Select -

Full-Year Resident of This State

Full-Year Resident of Another State

Part-Year State Resident



STEP 3

- Select **any checkbox that is true for you**; otherwise leave blank.
- **NOTE:** The most common on the list are the 1st & 2nd selections:
 - Claimed as a dependent on someone else's tax return:** If someone such as a caregiver, parent, or guardian provided more than half your support for the tax year (2023), they can legally claim you as a dependent on their tax return.
 - Full-time student at an eligible educational institution**

★ IMPORTANT: Make sure to check the last box indicating you are at least 18 and meet the requirements to claim the EIC (Earned Income Tax Credit).

Personal Information

Check all that apply:

- Anna can be claimed as a dependent on someone else's return. ?
- Anna was over age 18 and a full-time student at an eligible educational institution. ?
- Anna is blind.
- Anna is deceased.
- Anna wishes to contribute \$3 to the Presidential Election Campaign Fund.
- Anna served in a combat zone during the current tax year. ?
- Anna wishes to elect to use their 2019 earned income to figure their 2021 earned income credit and/or child tax credit.
- Anna was affected by a natural disaster during the current tax year.
- Anna received, sold, sent, exchanged, or otherwise acquired financial interest in virtual currency during the current tax year.
- Anna prefers to receive written communications from the IRS in a language other than English.
- Anna prefers to receive written communications from the IRS in an accessible format.
- Anna is at least age 18 and meets the requirements to claim the EIC. ?

CANCEL

STEP 3

- Select your **filing status**.
(Click the filing status wizard if you are unsure)
- Click **YES** or **NO** to claim dependents on your return:
 - If you are a custodial parent or guardian to a child or relative, click **YES** and enter their information.
 - If not, click **NO**.
- If you have experienced identity theft or tax fraud and the IRS has provided you with a six-digit Identity Protection Pin, select **YES**.
- If not, select **NO**.

What's your filing status? [? Learn more](#)

Single

Married Filing Jointly

Married Filing Separately

Head of Household

Qualifying Widow(er) with Dependent Children

Nonresident Alien

Need help determining your filing status?

FILING STATUS WIZARD

BACK **CONTINUE**

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. [? Learn more](#)

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

YES **NO**

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? [? Learn more](#)

Yes, someone on my return received an Identity Protection PIN.

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

BACK Skip **CONTINUE**

STEP 3

- Make sure your **personal information is all spelled and entered correctly.**
- Click **EDIT** if anything needs to be reentered and click **CONTINUE** when it is all correct.
- Click **CONTINUE** to enter your work and income information.

Let's do this! #slayit

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

CONTINUE



STEP FOUR

Enter your income if you had earned income, college scholarships or were self-employed. This includes tax documents such as W-2, 1099-NEC or MISC, 1098-T, etc. This also includes unemployment income from 1099-G forms.



STEP 4

- You can add your tax forms quickly with **Quick File**.
 - If you know which forms you need, click **CONTINUE**.
 - If you don't know which forms you need select **I don't know**.
- Next, you have 2 options:
 - **I want to be guided**: Select this option if you aren't sure whether you have all of your documents ready.
 - **Select my forms**: Select this option if you're sure you have all of your documents ready.
- If you **do not have any 2023 income** from jobs, scholarships, retirement, or other, select **SKIP INCOME**.

★ **REMEMBER:** To qualify for the Foster Youth Tax Credit you need to have had at least **\$1 in earned income in 2023**.

Add your forms quickly with Quick File

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

BACK 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 2023! 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.

SKIP INCOME CONTINUE

STEP 4


- If you had a **part-time, full-time, or seasonal job** as an employee, you will have a **W-2** from **each job** you had in 2023.
→ Enter the tax document information from every job that provided you with a W-2.
- Type in the information from your W-2 **exactly as it is** on your tax document and **click CONTINUE.**
- If you had **more than one** job in 2023, select **ENTER ANOTHER W-2.**

INCOME GUIDE

Wages & Salary

Form W-2

Do you have any W-2s to enter? [? Learn more](#)

Yes 

No

BACK [Restart/Exit Income Guide](#)

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 -- 

d Control number - Not required for filing taxes online.

STEP 4


- If you received **unemployment compensation** in 2023, you should have a **1099-G** form.
 - If you have a 1099-G form, **click YES** and **CONTINUE** on Unemployment Compensation and enter the information from the form.
 - If you do not have a 1099-G form, **click NO** and **CONTINUE**.
- If you **sold stocks, bonds or other property** you may have a 1099-B form.
 - If you have a 1099-B form, **click YES** and **CONTINUE**.
 - If you do not have a 1099-B form, **click NO** and **CONTINUE**.

INCOME GUIDE

Unemployment Compensation

Form 1099-G Box 1

Did you collect any unemployment benefits from a state or local government assistance program in 2023? [? Learn more](#)

Yes 

No


INCOME GUIDE

Stocks, Bonds, & Other Personal Property

Do you have sales of stocks, bonds, or other property to enter? [? Learn more](#)

Common sales reported here are:

- Stocks, bonds, and mutual funds (you typically receive Form 1099-B for these transactions)
- Collectibles, antiques, coins, art, gems, and stamps
- Main or second home (losses not allowed for sale of main home)
- Other personal property, such as cars, computers, etc. (losses not allowed for these types of property)

Yes 

No

STEP 4

- If you sold **stocks, bonds or other property** click **YES** and **CONTINUE** to enter your 1099-B form.
- Enter your transactions.
- **Some systems do not automatically provide a 1099-B form to you.** You may need to use a system like Coin Tracker or a similar service that will summarize your sales. Some of these are free and some are paid services. <https://www.cointracker.io/>

Capital Gains and Losses [?](#)

May receive Form 1099-B, reported on Schedule D

BEGIN



INCOME GUIDE

Stocks, Bonds, & Other Personal Property

Do you have sales of stocks, bonds, or other property to enter? [? Learn more](#)

Common sales reported here are:

- Stocks, bonds, and mutual funds (you typically receive Form 1099-B for these transactions)
- Collectibles, antiques, coins, art, gems, and stamps
- Main or second home (losses not allowed for sale of main home)
- Other personal property, such as cars, computers, etc. (losses not allowed for these types of property)

Yes

No



Capital Gains Transaction

Form belongs to
Anna Johnson

Description of Property *

Date Acquired

* Alternate Option: If Date Acquired is not known, leave the date blank and select an option here

MM DD YYYY

Date Sold

* Alternate Option:

Check here if a short sale. [? Learn more](#)

MM DD YYYY

Sales Price

* Alternate Option: If Sale Price is Expired, leave the sales price blank and select an option here

\$

STEP 4

- **If your tuition is more than your grants and scholarships, SKIP THIS STEP.**
- If you were a **half-time or full-time student** at a technical/trade school or college/university in 2023, enter your tax information from your **1098-T**:
 - Under **Additional Income** click **YES** (qualified education programs).
 - Under **Other Compensation** click **YES** (taxable scholarships and grants).
- Click **BEGIN Scholarships and Grants > Enter the amount.**
- Use the spreadsheet below to add up your qualified tuition, books, and fees, then subtract those costs from your total grants and scholarships received to know how much to enter into **other income**.
- **Spreadsheet to Calculate**

Scholarships Box 5 1098T
- minus Tuition and Fees Box 1 1098T
- minus Books and Supplies you paid for


= Other Income

INCOME GUIDE

Additional Income

Do you have any of the following additional income to enter?

- Rental property & royalties
- Profit or loss from farming
- Spousal support (alimony) received
- Miscellaneous income
- Gambling winnings
- K-1 income
- Qualified education programs
- Cancellation of debt
- Installment income
- Sale of business property
- Unreported tip income
- Foreign earned income
- Contracts & straddles
- Other compensation

Yes 


No

INCOME GUIDE


Other Compensation


Did you receive any of the following types of compensation? [? Learn more](#)

- Taxable scholarships and grants
- Fringe benefits
- Household employee income (that you did not receive a W-2 for)
- Prisoner earned income
- Foreign earned income

Yes 


No

Other Compensation 

Scholarships and Grants [? Learn more](#) 

Scholarships and Grants

Anna's scholarships and grants



STEP 4

- If you worked as a **contractor or gig worker** or self-employed enter the information from your forms **1099-MISC** or **1099-NEC**.
- Use the spreadsheet below to add up your qualified business expenses for 2023.

[Spreadsheet to calculate business expenses](#)

INCOME GUIDE

Nonemployee Compensation

Form 1099-NEC

Did you receive a Form 1099-NEC?

Yes 

No

STEP 4

- If you did not work for cash, **SKIP THIS SECTION.**
- If you worked for cash, go to the **Income section of the Federal return.**
- Click **BEGIN** on **Less Common Income**, then click **BEGIN** on **Other Income Not Reported Elsewhere.**
- Select **Other Income** from the dropdown menu, and enter a short description of the job/gig.
- Enter **how much money** you earned.
- Check the box that the income was earned.

Income

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

1099-G Box 1 ?
Unemployment compensation **BEGIN**

Less Common Income ?
K-1 earnings, gambling winnings, cancellation of debt, etc. **BEGIN**

Less Common Income

Other Income Not Reported Elsewhere **BEGIN**

Other Income

Form belongs to
Anna Johnson

Other Income Description *
Other Income

Description of other income *
babysitting

Amount of other income *
\$2000.00

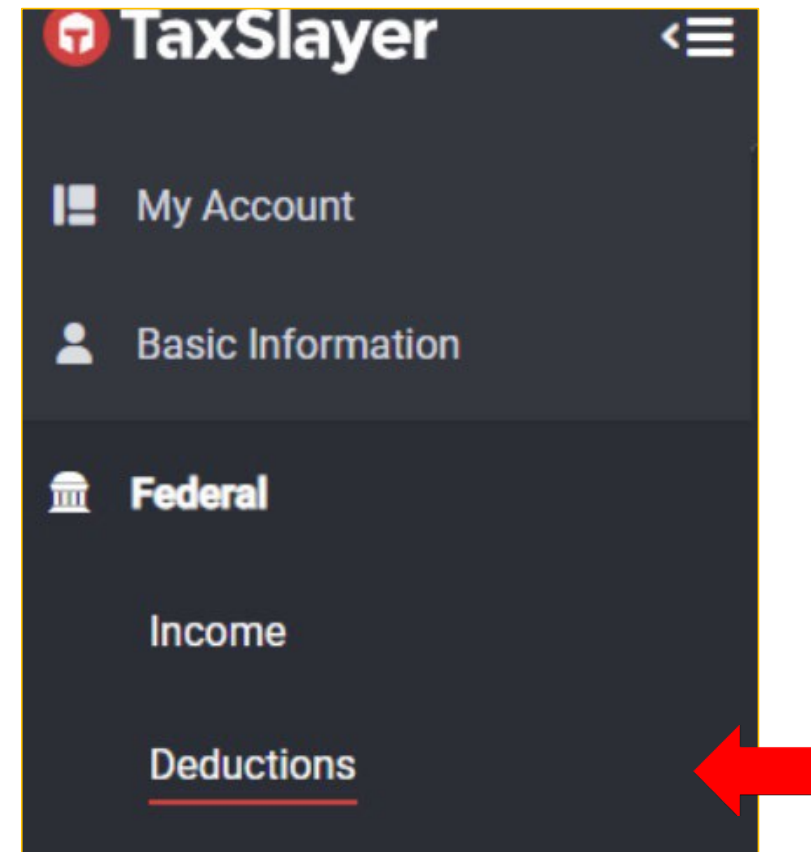
STEP FIVE

Maximize your refund by entering in credits and deductions like donations to charity, school expenses, business expenses and more. You may need to look at bank statements and receipts to get the most money possible.



STEP 5

- Deductions help **reduce what you owe in taxes** and some provide you with a cash back refund.
- Find **Deductions** in the **Federal** section of the return after **Income**.
- **EVERYONE** should click **I want to be guided**.



Let's see how we can cut your tax bill

How would you like to enter your deductions?



I want to be guided

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



Select my forms

I know which credits and deductions I qualify for and want to enter the information myself

STEP 5


- You may qualify for the **federal Earned Income Tax Credit** if you are between ages 25-65. If you are a custodial parent, you can qualify starting at age 18.
- **EVERYONE CLICK YES** to explore the possible credits and deductions related to you and your family, if you have children.

DEDUCTIONS GUIDE

Family Deductions

Do you want to explore possible credits and deductions related to your family?

Covered in this section:

- Child & dependent care costs
- Earned Income Tax Credit (EITC)
- Adoption expenses 

Yes

No

STEP 5

NOTE: The Child and Dependent Care Credit is worth up to \$3,000 per child per year.

- Click **YES** if you **paid for a babysitter or child care** in 2023, then your Child and Dependent Care Credit expenses.
 - Click **YES** > Click **YES**.
 - Enter the **Care Provider/Babysitter's Information**.
 - Enter **the amount you paid** for child care for each dependent.
- Click **YES** for the **EITC**.

Child and Dependent Care Expenses

Did you pay expenses for the care of a qualifying dependent or individual so that you or your spouse could work or actively look for work? [?](#)

Yes

No

BACK

CONTINUE

DEDUCTIONS GUIDE

Earned Income Tax Credit (EITC)

Do you want to explore possible credits and deductions related to you and your family?

NOTE:

The EITC is automatically calculated based on the income and personal information you entered. Select Yes if one of the following situations applies to you:

- You have been previously disallowed the EITC but wish to file it on this year's tax return
- You are a member of clergy and have eligible income to exclude from the EITC calculation
- You are currently ineligible for the EITC

Yes

No



STEP 5

Did you pay for **tuition, books, fees, and school supplies for higher education or career training?**

- Click **YES** that you would like to explore credits & deductions.
- Click **YES** that you paid qualifying education expenses.
- Click **YES** that you have completed entering your income information.
- Select your **student NAME**.
- Answer the questions about your **1098-T form**. If you do not have the form, you can request it from your educational institution.

Tuition and Fees Deduction [? Learn more](#) ➔ **BEGIN**

DEDUCTIONS GUIDE
Education Expenses

Would you like to explore possible credits and deductions related to education expenses? ➔

Covered in this section:

- Student loan interest
- Qualified education expenses (such as tuition)

Yes ➔

No

DEDUCTIONS GUIDE
Qualified Education Expenses
Form 1098-T

Did you pay expenses to a qualifying educational institution in 2021? [? Learn more](#)

NOTE:

- This deduction applies to expenses paid to schools that are eligible to participate in a st

Yes

No

EDUCATION GUIDE
Education Credits

You may be eligible for an education credit. Your income section must be complete to get an accurate calculation for your credit.

Have you entered all of your income and adjustments to income?

Yes, I have completed entering my income information

No, I have not entered my income information

Select a Student

Please select the student you wish to explore education credits for:

Anna Johnson

➕ Don't see who you're looking for? Add a dependent or spouse here

Form 1098-T

Do you have a 1098T form?

Did the student receive Form 1098-T from the educational institution for 2021?

Yes

No

Did the student receive Form 1098-T from the institution for 2020 with box 2 filled in and box 7 checked?

Yes

No

STEP 5

- Enter the **School Information from the 1098-T**. Click **CONTINUE**.
- **If your expenses are more than your scholarship/grants amount**, enter the information for **TUITION PAID** (Box 1), **GRANTS** (Box 5) and **OTHER QUALIFYING EXPENSES** (books and supplies you paid for out of your own bank account). **Click CONTINUE**.
- **If your scholarships/grants are more than your expenses and you added your scholarships/grants as described in Step 4 of this guide**, leave the middle box (**GRANTS**) blank here. Fill in the information from **TUITION PAID** (Box 1), and **OTHER QUALIFYING EXPENSES** (books and supplies you paid for out of your own bank account). **Click CONTINUE**.

Tuition and Fees Deduction [? Learn more](#) BEGIN

EDUCATION GUIDE

Add an Institution

Institution Name *
SCHOOL NAME

Country *
United States

Address (Number and Street) *
SCHOOL ADDRESS

ZIP Code *
94801

City, Town, or Post Office *
Richmond

State *
California

Employer identification number (EIN) *
-

Form 1098-T Information – SCHOOL NAME

If you paid expenses for higher education in 2021, enter the amounts in the corresponding fields to determine the amount eligible for an education tax credit.

Tuition Paid \$ **TUITION**

Grants \$ **GRANTS**

Other Qualified Expenses \$ **OTHER EXPENSES**

CONTINUE

STEP 5

- Confirm that you are eligible for the American Opportunity Tax Credit by **answering the four eligibility questions.**
- Select that you are eligible for the American Opportunity Tax Credit by **clicking on the box.**
- Click **CONTINUE.**

American Opportunity Tax Credit Eligibility

Answer the following questions to determine your eligibility for the American Opportunity Tax Credit.

Has the American Opportunity Tax Credit or the former HOPE credit already been claimed on four prior tax returns?

Yes

No ←

Was the student enrolled for at least half of an academic period that began in 2021?

Yes ←

No

Did the student complete the first four years of higher education before 2021?

Yes

No ←

Did the student have a felony drug conviction before the end of 2021?

Yes

No ←

EDUCATION GUIDE

We recommend the American Opportunity Tax Credit

We've calculated each option you're eligible for to best reduce your taxes owed or maximize your refund. If you don't want to claim the AOTC, you can make another selection below.

No Credit or Deduction Don't claim a credit or deduction \$0	Lifetime Learning Credit Claim the Lifetime Learning Credit. Decrease the amount I owe by/Increase my refund by \$0	<i>(Recommended)</i> American Opportunity Tax Credit Claim the AOTC. Decrease the amount I owe by/Increase my refund by \$400 ←
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←

STEP SIX

Answer the Health Insurance - Affordable
Care Act Insurance Plan Question



STEP 6

To Answer the **ACA 2023**
Question:

- Click **NO** if you have full-scope Medi-Cal coverage or have insurance through your employer.
- Click **YES** if you paid for health insurance using Covered California.

Affordable Care Act Insurance Plans

Reported on Form 1095-A

Did you, your spouse, or a dependent have insurance under the Affordable Care Act in 2022?* 

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

BACK

CONTINUE

STEP SEVEN

Prepare your California
State Tax Return and
Claim the **Foster Youth
Tax Credit!**

MORE CASH FOR FOSTER YOUTH

California's **NEW** Foster Youth Tax
Credit can put an **EXTRA \$1,117**
in your pocket this year!



STEP 7

Click **GET STARTED**.

- Select the **County where you live** from the drop down menu.

- Click **YES**.

- Click **YES**.

Nice work on your federal return!

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

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:
Arkansas, Arizona, Dist of Columbia, Georgia, Iowa, Idaho, Indiana, Kentucky, Massachusetts, Michigan, Minnesota, Missouri, Mississippi, Montana, North Carolina, North Dakota, New York, Oregon, Rhode Island, South Carolina, Virginia, Vermont, West Virginia

Returns for all other states are \$0.00

BACK [Skip state return](#) **GET STARTED**

California Return

County of Principal Residence

County of Principal Residence

--Select--

--Select--

Outside of California

Alameda

Alpine

Amador

Butte

Calaveras

Colusa

Contra Costa

Del Norte

El Dorado

Fresno

Glenn

Humboldt

Imperial

Inyo

Kern

Kings

Lake

Lassen

California Return

Principal Residence Address

Is your Principal/Physical Residence Address the same as the address on the tax return?

NO YES

California Return

Healthcare Coverage

Did the Taxpayer have Full year minimum essential health care coverage for all members of the household?

NO YES



STEP 7

- Click **NO** if you were insured through work or Medi-Cal.
- Click **YES** if you paid for insurance through Covered California


CA Renter's Credit:

- Click **YES** if you paid rent in CA for at least 6 months of the year. It doesn't matter if it is a small amount or through a public program - if you pay monthly rent select YES.

California Return

CA Health Insurance through CA Marketplace

Did you, your spouse, or a dependent enroll in health insurance through the CA marketplace/exchange?



California Return

Did your Name change from your Prior Year tax return?

Yes

No


The Renters Credit is *automatically calculated* if you answer **YES** below.

Do you qualify for the Renters Credit?

Yes

No

[? Learn More](#)

Use Tax 

STEP 7

- **Wait!** You are not done with the California return.
- Click **YES** to go to the main California Return page.
- **California Return:**
- Click **EDIT** on the Credits section to claim the Foster Youth Tax Credit.

Congratulations! You have completed your standard California state return!

Would you like to add any of the following items or any additional items not listed below to your California state return?

➤ Was party to a Registered Domestic Partnership

➤ Lived or worked in another state(s)

➤ Filing Status is Head of Household (Need to Complete CA Form 3532)

NO

YES



California Return

Basic Information

Personal info needed for CA return

EDIT

Additions to Income

Adjustments for income taxed by CA but not the federal government

BEGIN

Subtractions from Income

Adjustments for income taxed by the federal government but not CA

BEGIN

Itemized Deductions

State-specific itemized deduction adjustments

BEGIN

Credits

State-specific tax credits

BEGIN



STEP 7

CA Earned Income Credit & Foster Youth Tax Credit (Form 3514)

- Click **BEGIN**.

At the very top of the page it should say Foster Youth Tax Credit.

- Click **BEGIN** to go to the main Foster Care Tax Credit page.

CA Earned Income Credit & Foster Youth Tax Credit (Form 3514)

BEGIN



California Return

CA Earned Income Credit & Foster Youth Tax Credit (Form 3514)

Foster Youth Tax Credit

BEGIN



STEP 7

CA Foster Youth Tax Credit (scroll down):

- Click **YES** for eligibility for the Foster Youth Tax Credit.
- Click **YES** that you are eligible for the Foster Youth Tax Credit.
- Click **YES** to give consent for eligibility verification.

> California Return

CA Foster Youth Tax Credit

Foster Youth Tax Credit Eligibility

A qualified taxpayer that is at least 18 years old and younger than 26 years old as of the last day of the taxable year and is one who was in foster care while 13 years of age or older in an AFDC-FC placement, as described in Section 11402 of the Welfare and Institutions Code (AFDC-FC placements include an approved home a relative, a nonrelative extended family member, a licensed family home of a nonrelative, a licensed group home or short-term residential therapeutic placement, the home of a nonrelated legal guardian, a transitional housing placement for minors or a transitional housing placement for nonminor dependents, an out of state group home, a supervised independent living placement), including a tribally approved home, as defined in subdivision (r) of Section 224.1 of the Welfare and Institutions Code, or Approved Relative Caregiver Funding Program eligible placement, as described in Article 6 (commencing with Section 11450) of Chapter 2 of Part 3 of Division 9 of the Welfare and Institutions Code, by a Title IV-E agency, pursuant to a voluntary placement agreement or a juvenile court order.

Is the Taxpayer eligible for the Foster Youth Tax Credit?

- Yes 
- No

Taxpayer - Do you give consent and authorize the California Department of Social Services to share limited information about you with the California Franchise Tax Board for purposes of verifying your eligibility for the FYTC?

- Yes 
- No

STEP 7

CA Foster Youth Tax Credit (scroll down):

- **If your name has changed since you were in foster care**, type in your first, middle initial, and last name while in foster care.

This is so you can be verified correctly

- **If your name has not changed**, leave it blank.

> California Return

CA Foster Youth Tax Credit

If the Taxpayer's name was different while in foster care than name on tax return (FTB relies on the information entered on the tax return to verify taxpayer eligibility for the credit), enter that information below:

Taxpayer's First Name while in foster care if different than what is on the tax return

Taxpayer's Middle Initial while in foster care if different than what is on the tax return

Taxpayer's Last Name while in foster care if different than what is on the tax return

STEP 7

CA Foster Youth Tax Credit (scroll down):

- If you have proof of foster care (verification letter or ward of the court letter), **Click BEGIN.**
- **Upload the PDF letter** and click **DONE.**

> California Return

CA Foster Youth Tax Credit

If you are providing consent above, you may attach to this return a PDF letter issued by a county or state agency confirming each individual who claims the FYTC status as a foster youth at or after age 13, or other proof of status as a condition of receiving the FYTC. Below are samples of other proof/supporting documentation that may be provided:

- CDSS Foster Care Verification Form
- County-issued Letter

BEGIN



California Return

Please add a(n) CA 3514 Foster Youth Credit Proof of Status PDF Attachment



Drag and Drop PDF here, to upload a(n) CA 3514 Foster Youth Credit Proof of Status PDF Attachment



DONE

STEP 7

- **Keep this contact information in case you need it later.**
- Click **CONTINUE** to exit the main Foster Care Tax Credit page

If consent and/or the proof you submit does not result in satisfactory proof of your eligibility, you may be contacted to provide additional proof, which may delay a decision on your eligibility.

To request information needed to verify your status as a foster youth at or after age 13, contact:

- California Department of Social Services (CDSS)
- Telephone: 916.651.8848
Email: piar@dss.ca.gov
- Mail: 744 P Street, Sacramento, CA 95814
- Out-of-State Inquiries: cdss.osi@dss.ca.gov

A decision on your eligibility for the FYTC may be delayed or denied if your eligibility is not confirmed by CDSS or you do not provide satisfactory proof of your eligibility to the FTB. For that reason, we recommend that you check the applicable box to provide your consent and/or attach proof of your status as a foster youth at or after age 13 to your tax return.

CONTINUE



STEP 7

Foster Youth Tax Credit

- Click **NO** for "Has IRS previously disallowed your Federal EITC?"
- Click **NO** for "Has CA previously disallowed your CA EITC?"
- Leave the rest blank.
- Click **CONTINUE**.

California Return

CA Earned Income Credit & Foster Youth Tax Credit (Form 3514)

Foster Youth Tax Credit

BEGIN

Has IRS previously disallowed your Federal EIC?

Yes

No

Has CA previously disallowed your CA EIC?

Yes

No

Child #1 reported on CA 3514

BEGIN

Child #2 reported on CA 3514

BEGIN

Child #3 reported on CA 3514

BEGIN

In Home Supportive Services (IHSS) payments, or Medicare Waiver payments that are nontaxable for federal purposes that are NOT included on the CA return

\$

CONTINUE

STEP 7

- Click **BACK**.
- Click **EXIT CALIFORNIA RETURN**.

California Return

CA Earned Income Credit & Foster Youth Tax Credit (Form 3514)

Child Care Credit

BEGIN

College Access Tax Credit

BEGIN

Other Credits

BEGIN

Renters Credit

EDIT

Schedule S, Other State Tax Credit

BEGIN

CA Earned Income Credit & Foster Youth Tax Credit (Form 3514)

EDIT

BACK



EXIT CALIFORNIA RETURN

STEP 7

- Make sure to enter any additional information that may apply to your personal circumstances on your State Return.
- **Review your Total Income, Tax Credits and Refund Amounts.**
- Make sure you double check that all your eligible credits are in the summary, such as:
 - ✓ (Federal) Earned Income Tax Credit
 - ✓ (Federal) Child Tax Credit
 - ✓ (Federal) Education Credits
 - ✓ (State) California Earned Income Tax Credit
 - ✓ (State) Young Child Tax Credit
 - ✓ (State) Foster Youth Tax Credit
 - ✓ (State) Renters Credit
- **Click VIEW RETURN.**

Congratulations! You have completed your standard California state return!

Would you like to add any of the following items or any additional items not listed below to your California state return?

➤ Was party to a Registered Domestic Partnership

➤ Lived or worked in another state(s)

➤ Filing Status is Head of Household (Need to Complete CA Form 3532)

NO

YES

Tax Return Summary



Total Income

Adjusted Gross Income

Tax and Credits

Total Tax

Payments

Refund

California Refund

VIEW RETURN


STEP 7

- File Your Return > **Click YES.**
- Make sure you have your Adjusted Gross Income (AGI) accessible from the prior year tax return which allows you to file your return electronically.
- If you do not know your AGI you add up how much money you earned last year.

Ready to file?

If you're done with all the returns you need to file, we can get some final details and finish up!

Are you ready to keep going?

- Yes, I'm done with my return(s) and ready to file! 
- No, I'm not ready.

CHECK THE STATUS OF YOUR RETURN

When your Federal and/or state return(s) have been processed, **an automatic notification is sent to the e-mail address associated with your account**, as well as to the mailbox within your account located in the navigation menu on the left side of the screen. **If you did not receive the e-mail notification, please be sure to add TaxSlayer to your safe senders list so that their messages are not delivered to your SPAM or JUNK folder.**

Once your Federal and/or state return(s) have been accepted, you will be able to login to your account from the TaxSlayer homepage and access your accepted Federal and/state return(s) directly from the "My Account" screen shown under the "Return Status" tab. **You can click on the print button to print your returns.**

SAVE YOUR FILES & KEEP THEM SAFE

Save a copy of your return and your tax documents and receipts on a password protected computer or print a copy and save your return in a locked filing cabinet along with your tax documents.

NEED TO AMEND A RETURN?

Did you already file but need to file an Amendment, meaning correct something on your tax return? You may want to consider filing an amendment if missed a document, chose the wrong filing status, did not claim a dependent of yours, or missed a credit or deduction. If so, follow the directions here to correct your tax return: <https://www.taxslayer.com/tax-tools/tax-amendments>

JOHN BURTON ADVOCATES FOR YOUTH

For more tax filing resources, please visit:

<https://jbay.org/resources/tax-filing-tax-credits-informational-resources/>

