

# Instructions for Electronic Filing



## General Information

E-filing your return will electronically send your state tax return to the District of Columbia Office of Tax and Revenue. Your tax return will then be either "Accepted" or "Rejected". If your tax return is accepted it has been filed. If your tax return is rejected it has not been filed. If rejected, the issues in the tax return which caused the reject should be addressed and the tax return should be E-filed again or filed by mail.

## Required Information

To activate the "E-File Now" Button on Step 2. E-File Your Tax Forms you must complete the following:

**A.** Make sure the following personal information is complete on your main form:

- Name
- Address
- Social Security Number
- Filing Status
- Exemptions
- Standard or itemized deductions
- Calculated and entered your tax amount
- State withholding amount from all form W-2s and 1099s received.

**B.** All four sections of Step 2 listed below, by entering any data that applies to you:

### Section 1: Information Needed for District of Columbia Return

In this section you are required to enter forms or check the box stating that you have none to enter.

**a.** Add any W-2s, 1099-Rs, W-2Gs, 1099-G, 1099-MISC, 1099-INT, 1099-DIV you received. Select the "Add" button next to the items you have to enter. Enter each item separately and be sure to include all required information as this is **mandatory** to activate the E-File Now button. For instance, if you received two W-2s select the "Add" button for W-2s and enter in the information exactly as it appears on your first W-2. Then select the "Add" button again and enter the information from your second W-2, exactly as shown on the second W-2. Do this for each W-2, 1099-R, W-2G, 1099-G, 1099-MISC, 1099-INT, 1099-DIV that you received.

**b.** If you don't have any of the above forms to include then check this box.

### Section 2: Signing Your Return

In order to E-File you must check the box certifying that the information in the Disclosure Statement is true.

### Section 3: Additional Information Needed to E-file your District of Columbia Return

You are required to have a valid email address in order to e-file your return. To ensure accuracy enter it twice. Both email addresses must match exactly.

### Section 4: Refund

You have three options on how to receive your refund paper check, direct deposit, or a Tax Refund Card. Make your selection directly on your tax return. Read the instructions for more information on each method.

### Section 5: Payment Options

- **Balance Due Paid by Check** - If paying by check print form D-40P and mail it with your check to the District of Columbia Office of Tax and Revenue.
- **Electronic Funds Withdrawal** - Check the box indicating that you will be using this payment method, then enter the routing number, account number, select checking or savings, enter the date you would like the payment to be made (any business day prior to or on the due date of the return), and designate if the funds will be originating from an account outside of the U.S.