

# Instructions for Electronic Filing



## General Information

E-filing your return will electronically send your state tax return to the Pennsylvania Department of 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
- Filing Status
- Calculated and entered your tax amount

**B.** Sections 1-4 of Step 2 listed below, by entering any data that applies to you:

### Section 1: E-Signature

You are required to enter a five-digit self-select PIN. If filing with a spouse you must both enter your five-digit Personal Identification Number (PIN). If filing a joint return on behalf of one or more deceased taxpayers, you must enter both PINs.

### Section 2: Additional Information Needed to E-file Your Pennsylvania 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 3: Refund Options

- **Direct Deposit** - You must complete all of the information in this section to get your refund by direct deposit. Enter your nine- digit bank routing transit number, your bank account number, type of account, if the funds will go to an account outside of the U.S., and check the authorization box.

### Section 4: Payment Options

- **Paying Tax Due by Check** - If paying by check, print form PA-V Payment Voucher, and mail it with your check to the Pennsylvania Department of Revenue.
- **Electronic Funds Withdrawal** - If paying by electronic funds withdrawal you are required to enter all of the information in this section your nine-digit bank routing transit number, bank account number, type of account, if the funds will be coming from a bank outside of the U.S., date to withdrawal the funds, your phone number, and check the authorization box.