

# Instructions for Electronic Filing



## General Information

E-filing your return will electronically send your state tax return to the Virginia Department of Taxation. 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
- 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: Federal Information Needed for Virginia 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 or 1099-MISC you received. Select the "Add" button next to the items you have to enter. Enter each item separately and be sure to include the employee's name (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, and 1099 MISC that you received.

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

### Section 2: E-Signature Required

Enter a 5-digit electronic signature personal identification number for yourself and spouse if filing jointly.

### Section 3: Additional Information Needed to E-file your Virginia Return

- a.** 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.
- b.** If using direct deposit for a refund or electronic funds withdrawal to pay a balance due you must designate whether or not the funds are going to or coming from an account outside of the U.S.

### Section 4: Refund/Payment Options

- **Refund** - Virginia Department of Taxation will not be issuing paper checks. You can select to receive your refund by Direct Deposit or a Prepaid Debit Card. Make your selection on Form 760. If using Direct Deposit enter your banking information directly on Form 760.
- **Balance Due Paid by Check** - Print form 760-PMT or 760-PFF and mail it with your check to the Virginia Department of Taxation.
- **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, and select the date you would like the payment to be made (any business day prior to or on the due date of the return).