I-CAN!® E-FILE

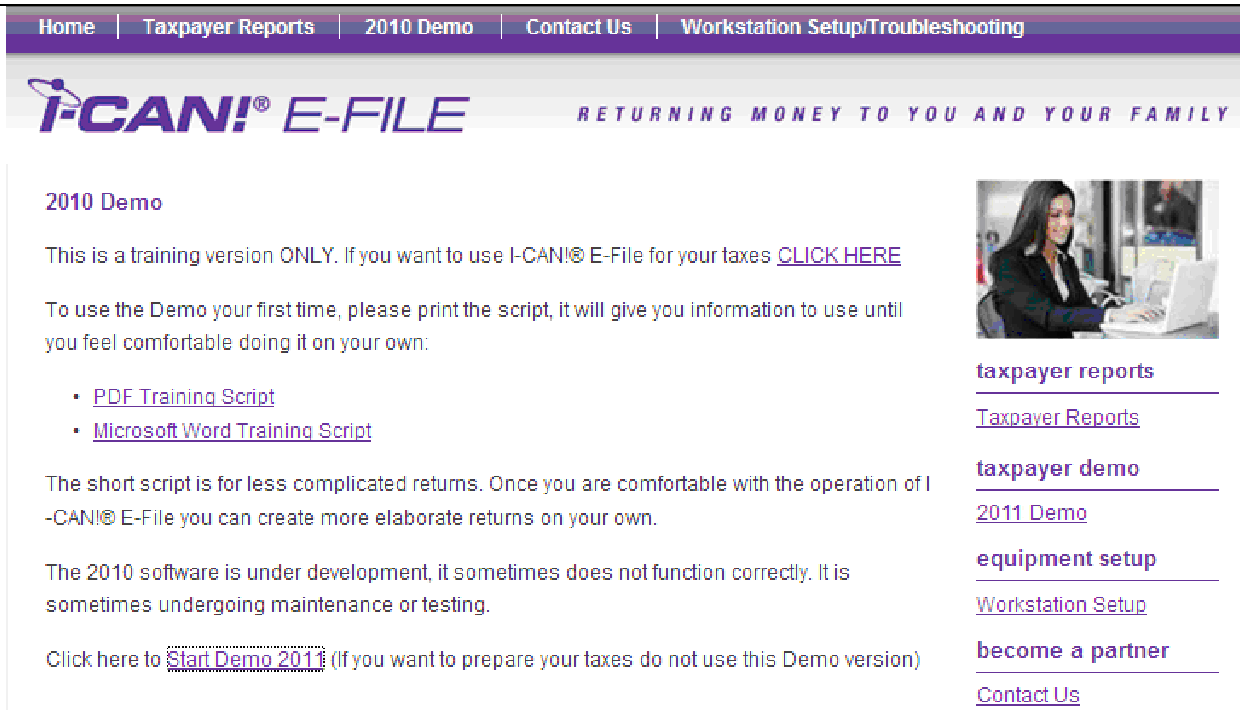
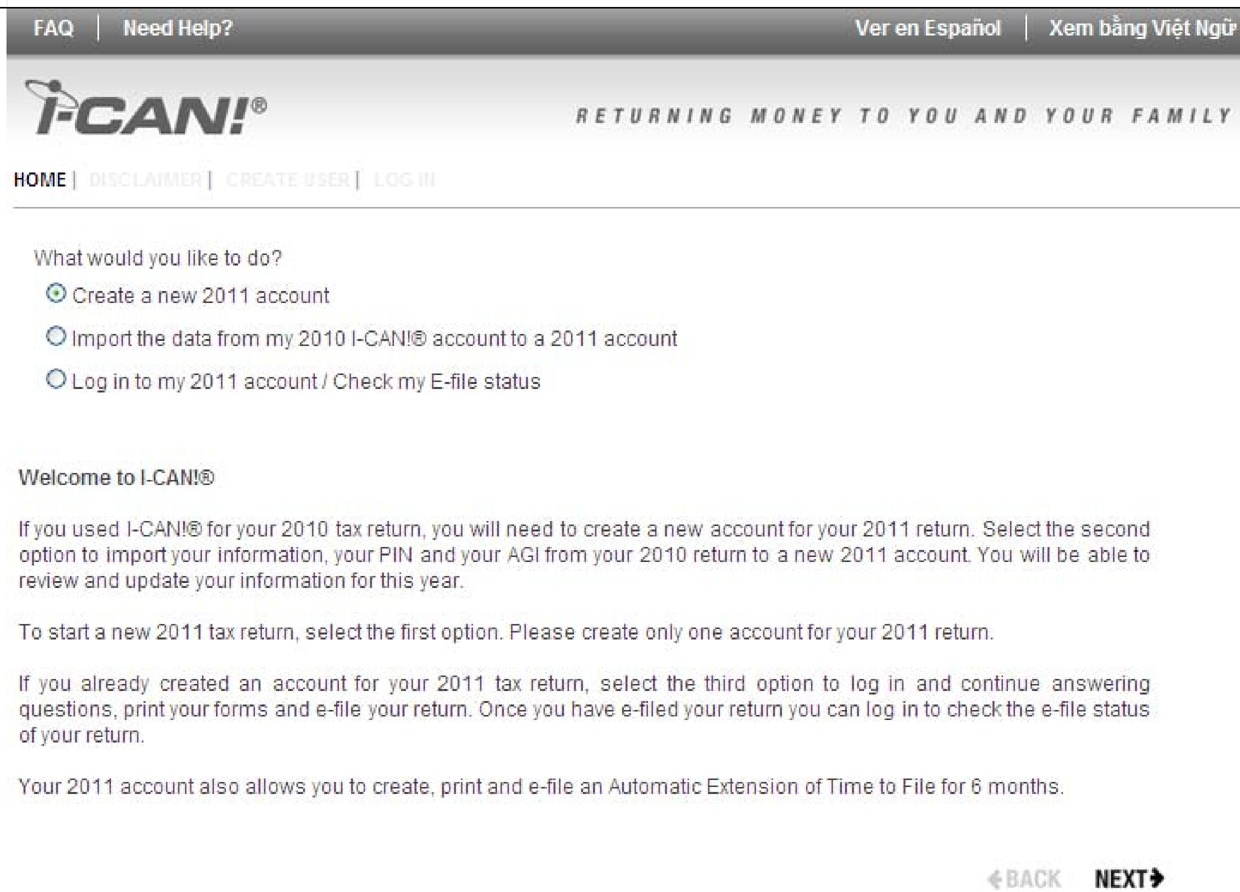
EIC 2011 Sample Taxpayer Walkthrough

The purpose of this document is to walk you through the 2011 tax module as a taxpayer, so that you can see what the user experiences and know how to answer basic questions.

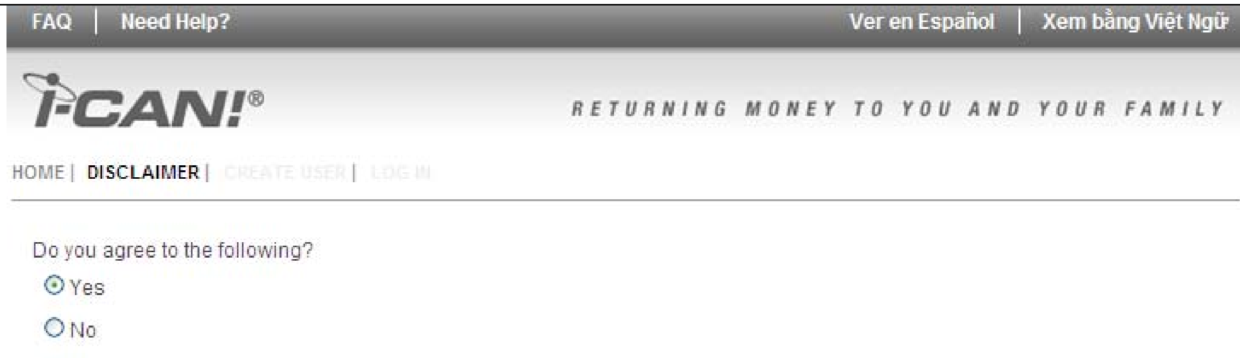
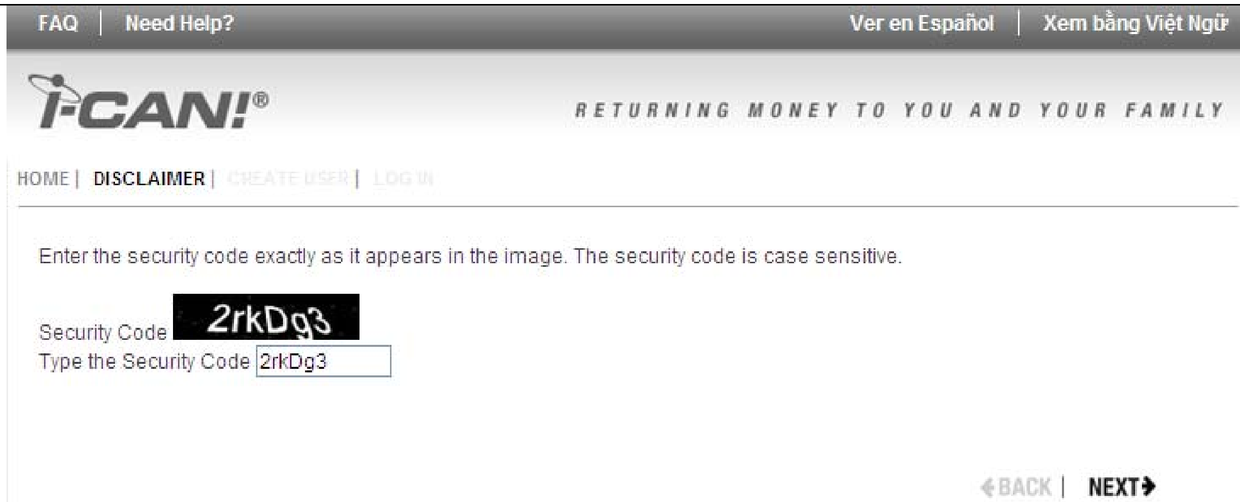
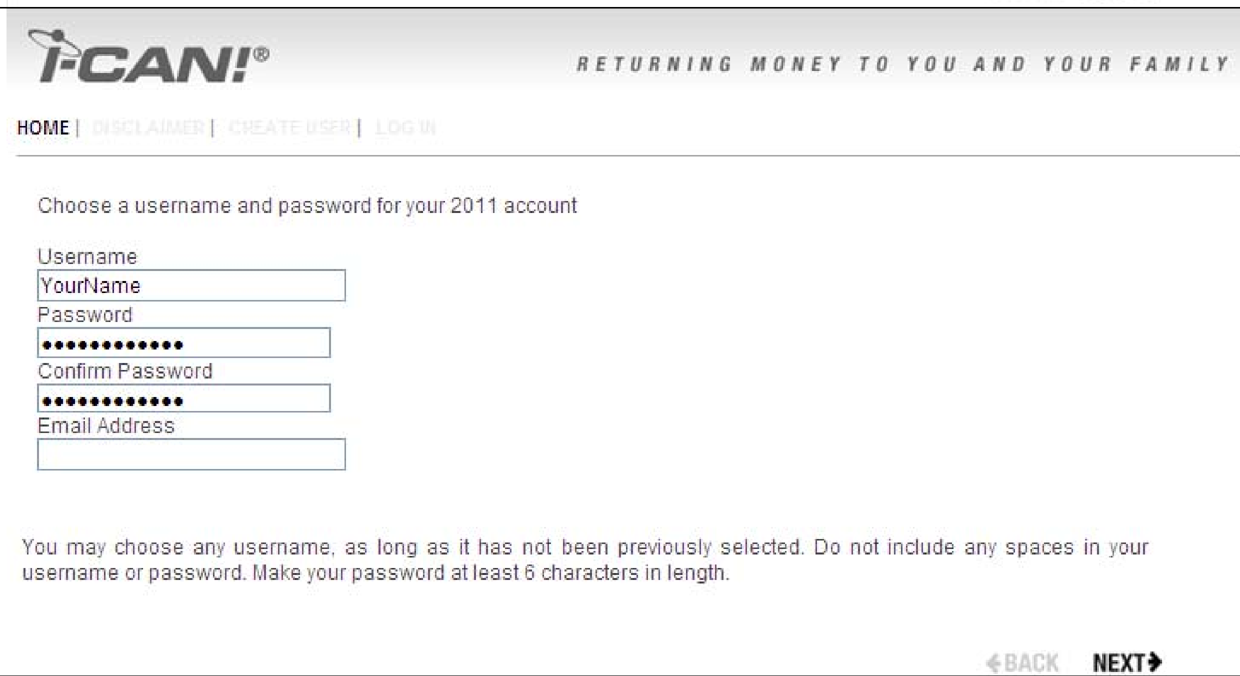
This document will show you how to:

- Start a new Federal return
- Create a username and password
- Enter personal information
- Enter dependent information
- Enter income information
- Enter credits
- Enter deductions
- Start a State return
- Review taxpayer information
- Setup Direct Deposit/Debit
- Print and review taxpayer forms
- Contribute to I-CAN! E-File
- Self-Select Federal and State 'PIN'
- Confirm and e-File returns
- Check Status of e-File
- Create an additional scenario

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

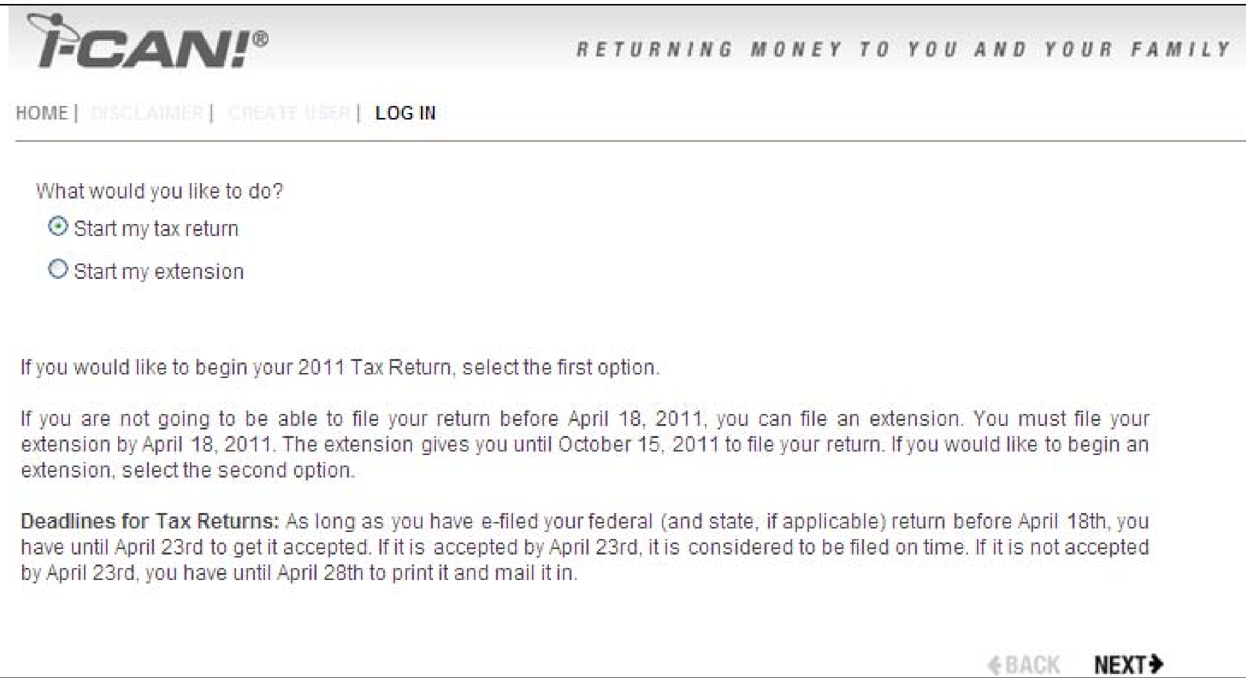
<table>
<tr><td></td><td></td></tr>
<tr><td>Go to www.icanefile.org and click on “Partners” then 2011 Demo.”</td><td>
</td></tr>
<tr><td>Select ‘Create a new 2011 account’ and click ‘Next’</td><td>
</td></tr>
</table>

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Agree to the disclaimer	
Enter the Verification Code exactly as you see it. (The code is case sensitive).	
For the purposes of this training, please establish your own Username (your name with no spaces) and a password. You will use this username and password to access the Demo data.	

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

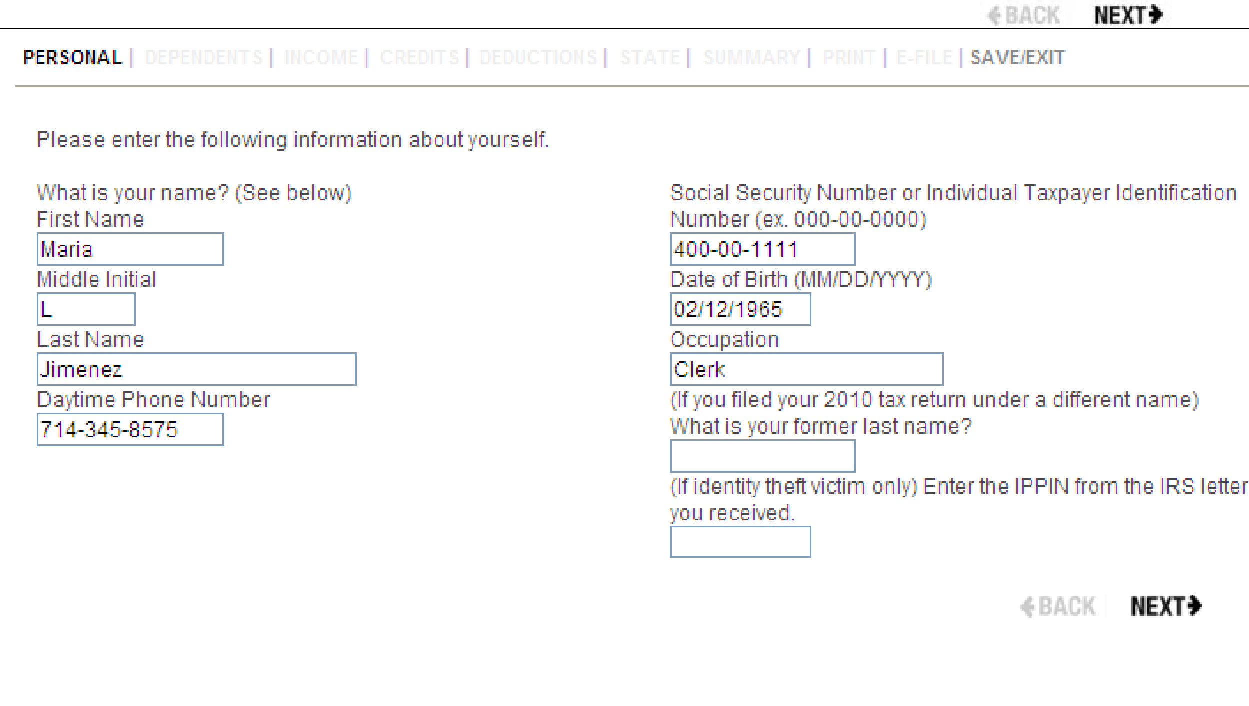
Select 'Start my tax return' and click 'Next'



Personal Information

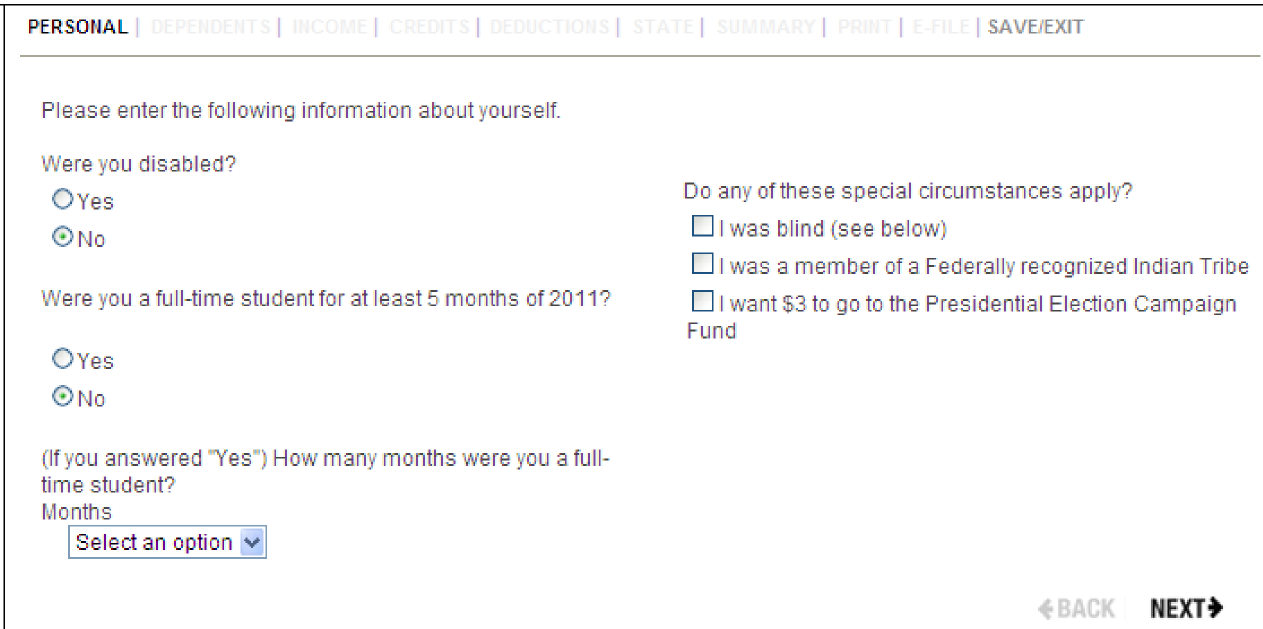
Enter the taxpayer's personal information on the following screens.

****In this demo, Social Security numbers used MUST be in the range of 400-00-XXXX.**

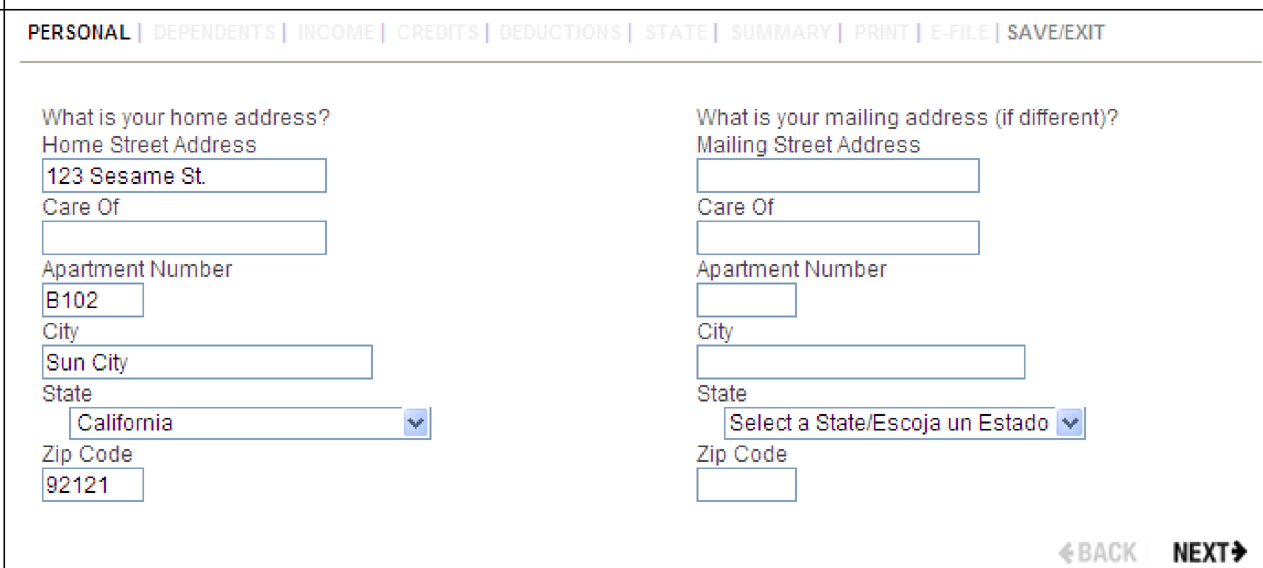


Copyright 2011 © All rights reserved Legal Aid Society of Orange County

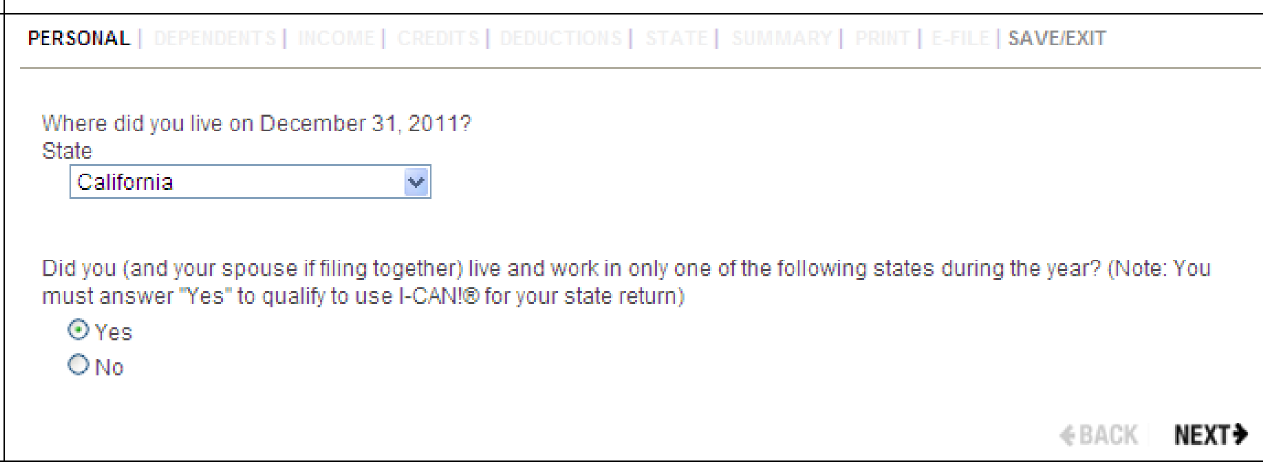
*As you navigate through the module, you will see tabs along the top of each screen. You are now in the 'Personal' tab.



Enter the following information and click 'Next'



In order to use I-CAN! E-File to file your state return, you (and your spouse if filing together) must have lived and worked in the same state for the entire year.



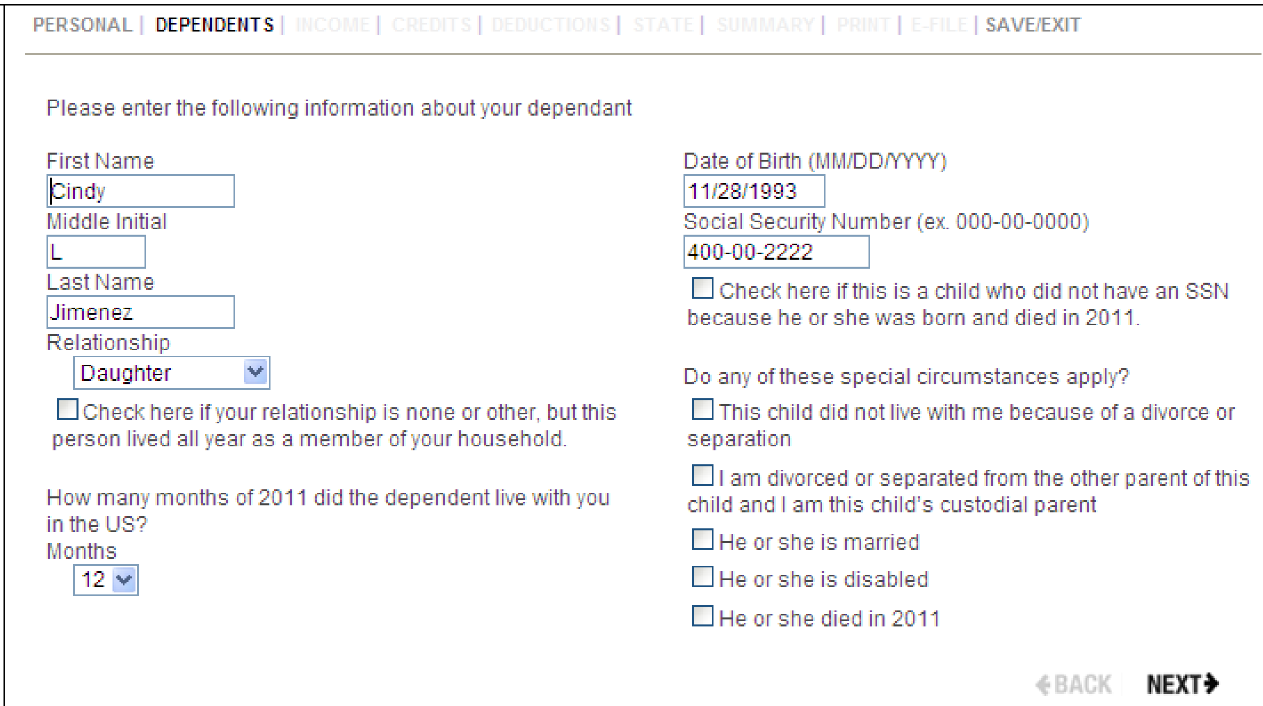
Copyright 2011 © All rights reserved Legal Aid Society of Orange County

This taxpayer can not be claimed as a dependent.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Can you be claimed as a dependent of anyone (other than your spouse) in 2011? ○ Yes, I was a dependent as a qualifying child ○ Yes, I was a dependent as a qualifying relative ⊙ No, I was not a dependent BACK NEXT
Maria is single and paid more than half the costs of keeping up a home for the year.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Choose the option that best describes your marital status to allow I-CAN!® to determine your filing status ⊙ Single ○ Married ○ Married, but I did not live with my spouse at all between July 1, 2011 and December 31, 2011 ○ My spouse passed away in 2011 and I did not remarry in 2011 ○ My spouse passed away in 2009 or 2010 and I have not remarried (as of the end of 2011) Did you pay **MORE THAN HALF** of the cost of keeping up a home for the year? ⊙ Yes, I paid more than half of the costs ○ No, I paid less than half of the costs BACK NEXT
Maria did not pay or receive alimony.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Did you (or your spouse if filing together) pay **OR** receive alimony in 2011? ○ Yes ⊙ No BACK | NEXT
Dependents Maria has one dependent, a daughter named Cindy.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you have any dependents, qualifying children or qualifying relatives? ⊙ Yes ○ No BACK NEXT

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Enter the dependent information as you see on the screen.

*You are now in the 'Dependents' tab.



PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT

Please enter the following information about your dependant

First Name: Cindy
Middle Initial: L
Last Name: Jimenez
Relationship: Daughter

☐ Check here if your relationship is none or other, but this person lived all year as a member of your household.

How many months of 2011 did the dependent live with you in the US?
Months: 12

Date of Birth (MM/DD/YYYY): 11/28/1993
Social Security Number (ex. 000-00-0000): 400-00-2222

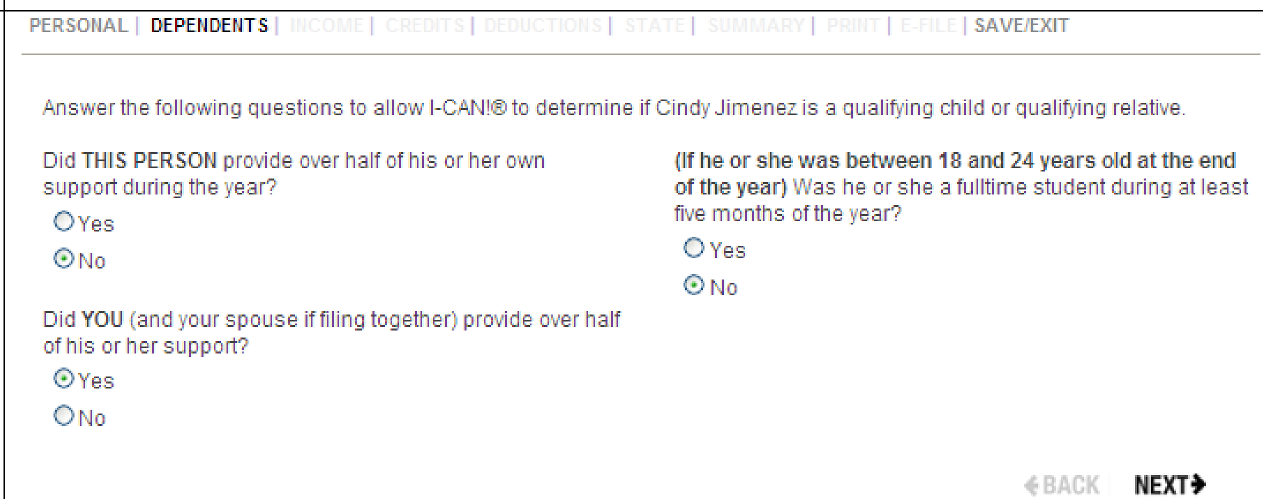
☐ Check here if this is a child who did not have an SSN because he or she was born and died in 2011.

Do any of these special circumstances apply?

☐ This child did not live with me because of a divorce or separation
☐ I am divorced or separated from the other parent of this child and I am this child's custodial parent
☐ He or she is married
☐ He or she is disabled
☐ He or she died in 2011

BACK NEXT

Answer the following questions to allow I-CAN! to determine if the dependent is a qualifying child.



PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT

Answer the following questions to allow I-CAN!® to determine if Cindy Jimenez is a qualifying child or qualifying relative.

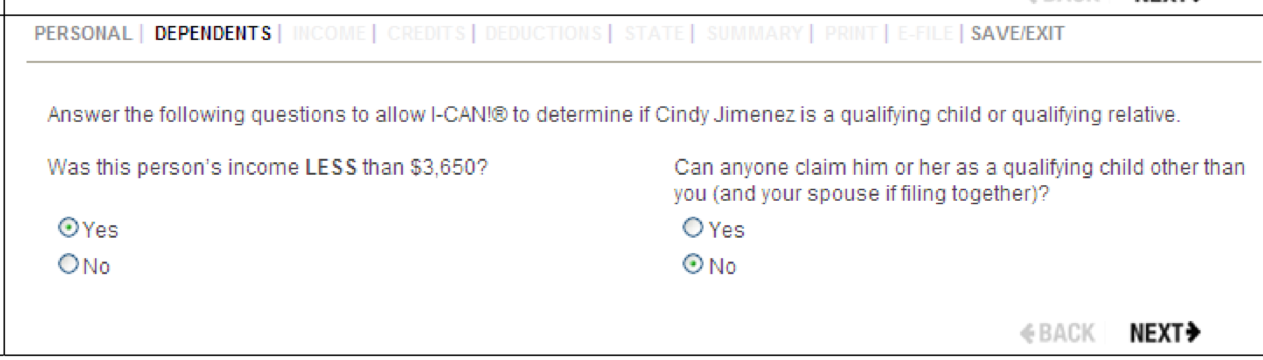
Did **THIS PERSON** provide over half of his or her own support during the year?
○ Yes
⦿ No

Did **YOU** (and your spouse if filing together) provide over half of his or her support?
⦿ Yes
○ No

(If he or she was between 18 and 24 years old at the end of the year) Was he or she a fulltime student during at least five months of the year?
○ Yes
⦿ No

BACK NEXT

Cindy's income was less than $3650 and can not be claimed as a qualifying child by anyone else.



PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT

Answer the following questions to allow I-CAN!® to determine if Cindy Jimenez is a qualifying child or qualifying relative.

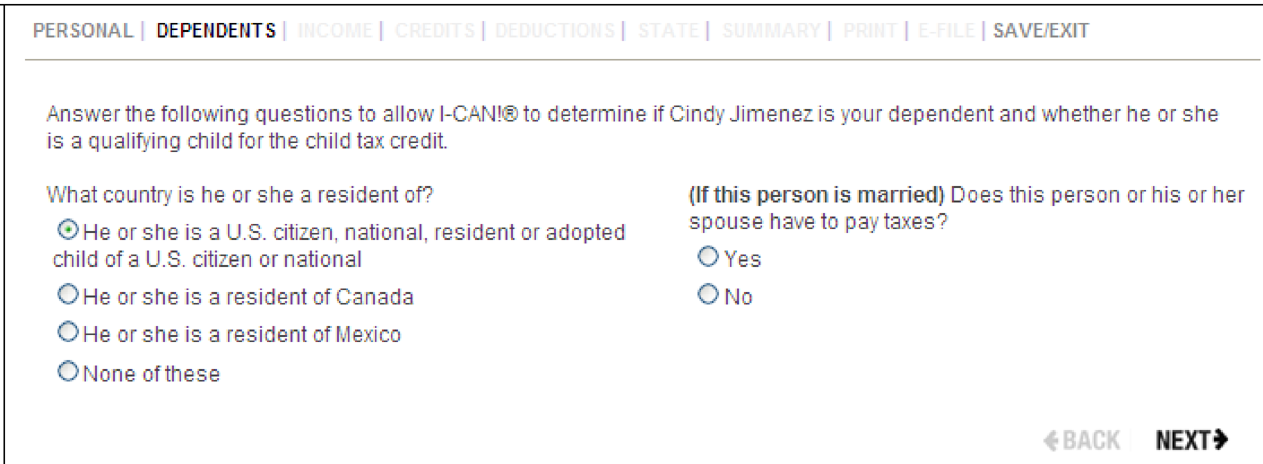
Was this person's income **LESS** than $3,650?
⦿ Yes
○ No

Can anyone claim him or her as a qualifying child other than you (and your spouse if filing together)?
○ Yes
⦿ No

BACK NEXT

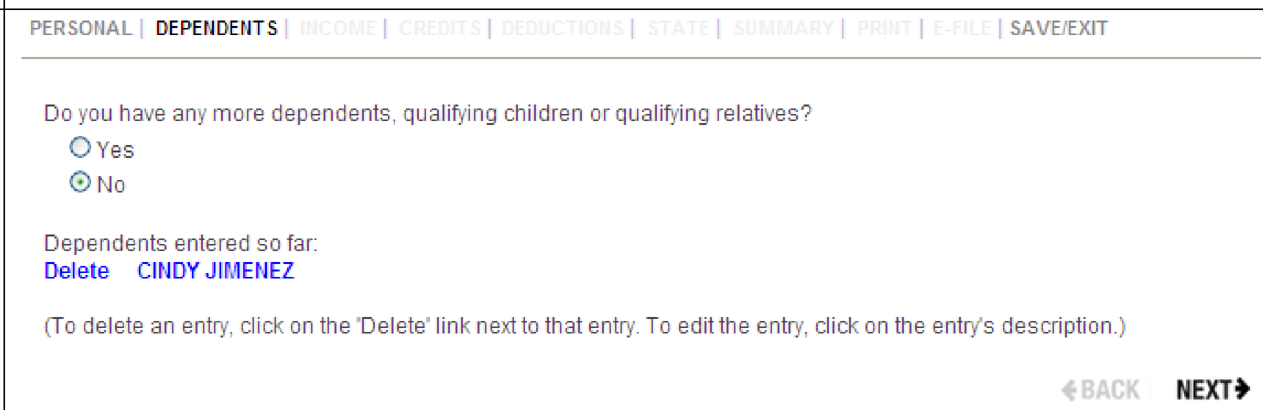
Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Cindy is a U.S. citizen and is not married.



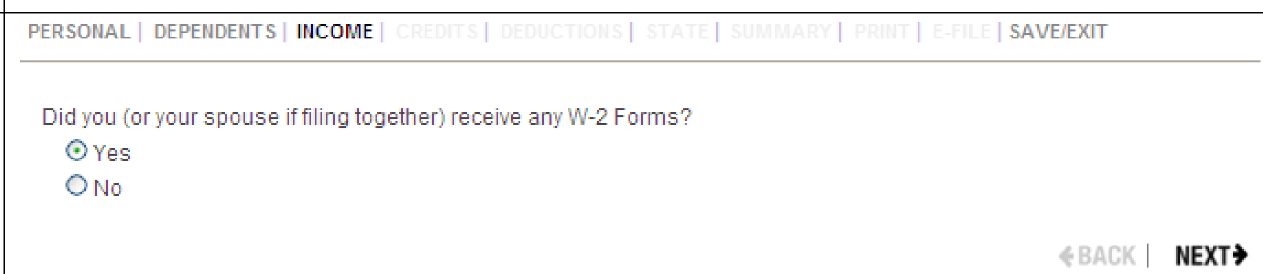
If the taxpayer has additional dependents they may be added by selecting 'Yes'

Select 'No' and click 'Next'

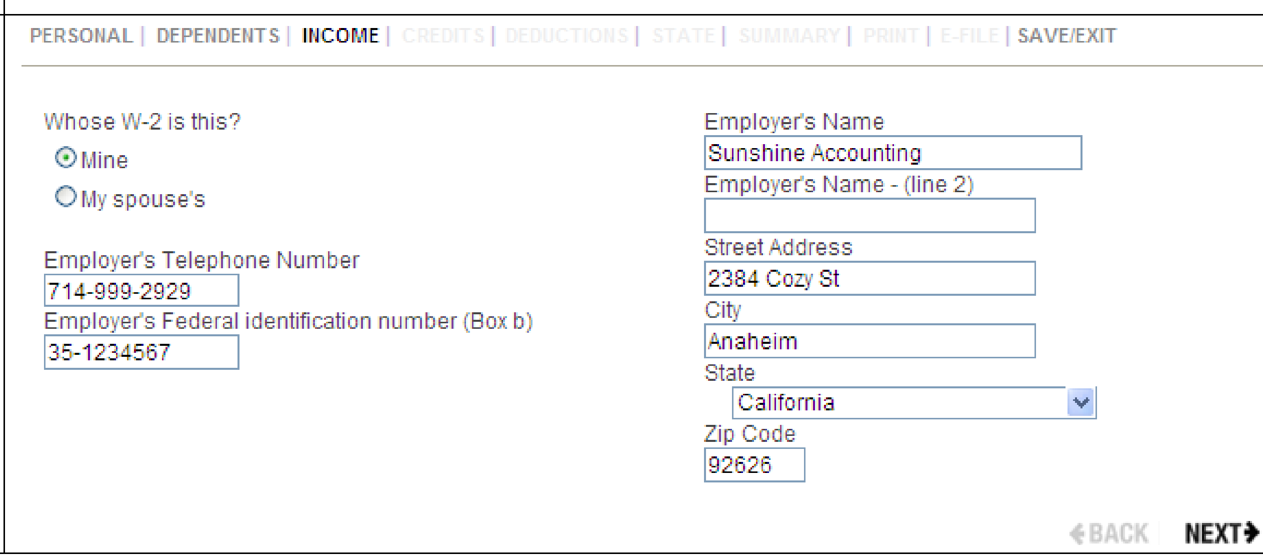


Income

This taxpayer has a W-2 form.



Enter the W-2 information here.



Copyright 2011 © All rights reserved Legal Aid Society of Orange County

W-2 Address (if different than the taxpayers mailing address).	PERSONAL | DEPENDENTS | **INCOME** | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT **(If the listed address is different than your mailing or home address)** What is your address listed on this W-2 (Box E)? Street Address Care Of City State Select a State/Escoja un Estado Zip Code BACK NEXT
Income from W-2.	PERSONAL | DEPENDENTS | **INCOME** | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Wages, tips, other compensation (Box 1) $ 13270 Federal income tax withheld (Box 2) $ 1330 Social security wages (Box 3) $ Social security tax withheld (Box 4) $ 300 Medicare wages and tips (Box 5) $ Medicare tax withheld (Box 6) $ 300 Social security tips (Box 7) $ Allocated tips (Box 8) $ Advance EIC payment (Box 9) $ Dependent care benefits (Box 10) $ BACK NEXT

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Answer 'No' for Box 14 and click 'Next'	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Nonqualified plans (Box 11) $ Box 12a code letter Amount $ Box 12b code letter Amount $ Box 12c code letter Amount $ Box 12d code letter Amount $ Check the boxes that are checked in Box 13 ☐ Statutory employee (See below) ☐ Retirement plan ☐ Third-party sick pay Is there anything listed in Box 14? ○ Yes ◉ No (If you answered that the "Statutory employee" box is checked in Box 13, see below and answer the following questions) What is your business name? (If you do not have a separate business name, enter your name) What is your main business activity? What is your product or service? BACK NEXT
Enter the following information and click 'Next'	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT State (Box 15) California Employer's state ID number (Box 15) 35-3453454 State wages, tips, etc. (Box 16) $ 13270 State income tax (Box 17) $ 1464 Local wages, tips, etc. (Box 18) $ Local income tax (Box 19) $ Locality name (Box 20) BACK NEXT
If the taxpayer has an additional W-2 it can be added here. Select 'No' and click 'Next'	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you (or your spouse if filing together) have another W-2? ○ Yes ◉ No W2's listed so far: Delete SUNSHINE ACCOUNTING (To delete an entry, click on the 'Delete' link next to that entry. To edit the entry, click on the entry's description.) BACK NEXT

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

If the taxpayer has 1099 income it can be added here. Select 'No', and click 'Next'	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you (or your spouse if filing together) have any of the types of income listed on the following 1099 forms? ○ Yes ◉ No BACK NEXT
Maria has no income or loss from rental real estate or royalty property.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you (or your spouse if filing together) have income or loss to report from rental real estate or royalty property? ○ Yes ◉ No BACK NEXT
Answer 'No' and click 'Next'	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you (or your spouse if filing together) have any capital gains or losses (including sales of stocks, bonds and mutual funds reported on 1099-B)? ○ Yes ◉ No BACK NEXT PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you have capital loss carryover from 2010? ○ Yes ◉ No BACK NEXT
Maria did not have her own business.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Did you (or your spouse if filing together) have your own business? ○ Yes ◉ No BACK NEXT

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Answer 'No' and continue.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Did you (or your spouse if filing together) receive gambling winnings (you may have received a W2-G)? ○ Yes ⊙ No BACK | NEXT
Maria doesn't have any tip income to report.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Did you (or your spouse if filing together) receive tips that you did not report to your employer even though you were required to? **(If your employer reported allocated tips in box 8 of your form W-2, answer "Yes")** ○ Yes ⊙ No BACK | NEXT
Maria has no other income to report.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Did you (or your spouse if filing together) receive any other income? ○ Yes ⊙ No BACK NEXT
Credits Select 'No' and continue.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Did you pay for care for a child under age 13 or a disabled dependent so that you (or your spouse if filing together) could work or look for work? ○ Yes ⊙ No BACK NEXT
Maria does not qualify for an Educational Credit or Deduction this year.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you (or your spouse if filing together) or any dependent qualify as a student in a college or vocational program for an Educational Credit or Deduction? ○ Yes ⊙ No BACK NEXT

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Answer 'No' and continue.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Did you (or your spouse if filing together) or any of your dependents pay interest on a student loan? (1098-E) Yes No BACK NEXT
Answer the question on this screen to allow I-CAN! E-File to determine if the taxpayer qualifies for Earned Income Credit (EIC).	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Answer the following questions to allow I-CAN!® to determine if you qualify for Earned Income Credit (EIC). Are all of the items below true? Yes No BACK NEXT In order to claim the Earned Income Credit all of the following must be true: 1. You (and your spouse if filing together) must **NOT** be the qualifying child or dependent of anyone 2. You (and your spouse if filing together) must have a valid Social Security Number (**NOT** an ITIN) 3. You (and your spouse if filing together) must **NOT** have any foreign earned income 4. You (and your spouse if filing together) must have less than $3100 investment income 5. You (or your spouse if filing together) must have earned income 6. If you do not have a qualifying child, you (or your spouse if filing together) must be between the ages of 25 and 65 The credit is reduced or eliminated if your income is higher than certain limits, based on your filing status.
Select 'No' and click 'Next'	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Was your Earned Income Credit reduced or disallowed last time you filed for it? Yes No BACK | NEXT
Maria did not make contributions to an IRA in 2011.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Did you (or your spouse if filing together) make contributions to a Traditional or Roth IRA? Yes No BACK NEXT

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Maria made no payments to the IRS.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Did you make any of the following payments to the IRS for the 2011 tax year? ○ Yes ⦿ No BACK | NEXT
Select 'No' and continue.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Were you (or your spouse if filing together) a qualified educator? (See below) ○ Yes ⦿ No (If you answered "Yes") How much of your educator expenses are you qualified to deduct? Amount $ (If you answered "Yes" and you are married filing together) How much of your spouse's educator expenses are you qualified to deduct? Amount $ (If you answered "Yes") Which state were you a resident of when you or your spouse worked as an educator? ○ California ○ Michigan ○ Montana ○ New York ○ Pennsylvania ○ Other BACK NEXT
Select 'No' and continue.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Did you (or your spouse if filing together) pay for health insurance coverage established under your (or your spouse's) business name? ○ Yes ⦿ No (If you answered "Yes") How much did you pay for health insurance for you, your spouse and any dependents? Amount $ (If you answered "Yes" and you are married filing together) How much did your spouse pay for health insurance for you, your spouse and any dependents? Amount $ (If you answered "Yes") Which state were you a resident of when you (or your spouse) paid for health insurance under your (or your spouse's) business name? ○ California ○ Michigan ○ Montana ○ New York ○ Pennsylvania ○ Other (If you are filing a California return) If your health inurance includes an adult child that is not qualified for tax-free medical coverage for California, how much is the adult child's portion of the insurance cost? $ BACK NEXT

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Maria does not qualify for the moving expenses deduction.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you (or your spouse if filing together) qualify for the moving expenses deduction? ○ Yes ⦿ No BACK NEXT
Answer 'No' and click 'Next'	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you qualify for the Residential Energy Credits? ○ Yes ⦿ No BACK NEXT
Maria did not make contributions to or receive earnings on a Health Savings Account.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Did you (or your spouse if filing together) make contributions to a Health Savings Account (HSA)? ○ Yes ⦿ No **(If you are filing a California return)** Did you receive interest or other earnings on an HSA account? ○ Yes ⦿ No (If you answered "Yes") How much did you receive in interest and other earnings on your HSA account? $ BACK NEXT
Maria does not qualify for the First-Time Homebuyer Credit.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you qualify as a first-time homebuyer to claim a credit for a home you purchased in 2011? ○ Yes ⦿ No BACK NEXT
Select 'No' and continue.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you need to repay an installment of the 2009 First-Time Homebuyer Credit you claimed? ○ Yes ⦿ No BACK NEXT

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Select 'No' and continue.	PERSONAL | DEPENDENTS | INCOME | **CREDITS** | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you qualify as a long-time resident homebuyer to claim a credit for a home you purchased in 2011? ○ Yes ◉ No BACK NEXT
Deductions Maria does wish to itemize her deductions.	PERSONAL | DEPENDENTS | INCOME | CREDITS | **DEDUCTIONS** | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you want to itemize your deductions? ◉ Yes ○ No ○ I am married filing separately and my spouse is itemizing his or her deductions (See bold text below) BACK NEXT
Enter '0' in both spaces and click 'Next'	PERSONAL | DEPENDENTS | INCOME | CREDITS | **DEDUCTIONS** | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Total medical and dental expenses $ 0 Long term care premiums included in amount above (See instructions for limits on the amount you can claim). $ 0 BACK | NEXT
Answer 'No' and click 'Next'	PERSONAL | DEPENDENTS | INCOME | CREDITS | **DEDUCTIONS** | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT State and local income taxes $ (If you did not enter an amount for "State and local income taxes") State and local general sales taxes (See below) $ Real estate taxes $ Do you have other taxes that can be deducted? ○ Yes ◉ No BACK NEXT
Select 'No' and continue.	PERSONAL | DEPENDENTS | INCOME | CREDITS | **DEDUCTIONS** | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Did you pay any home mortgage interest, qualified mortgage insurance premiums or investment interest? ○ Yes ◉ No BACK | NEXT

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Select 'No' and continue.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Gifts to charity that you made by cash or check $ Gifts to charity that you made by a method other than cash or check. $ Amount of carryover of any gifts to charity from an earlier year that you could not deduct because they exceeded your adjusted gross income limit. $ Are you claiming more than $500 of gifts to charity that you made by a method other than cash or check? Yes No BACK NEXT
Select 'No' and continue.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Did you have any property that was damaged or lost from a casualty (disaster) or theft? Yes No BACK NEXT
Maria does not qualify for the Employee Business Expenses deduction.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you (personally, not your spouse) qualify for the Employee Business Expenses deduction? Yes No BACK NEXT
Maria is not married.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Does your spouse qualify for the Employee Business Expenses deduction? I am not married OR I am not filing together with my spouse Yes No BACK NEXT

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Click 'Next'	PERSONAL | DEPENDENTS | INCOME | CREDITS | **DEDUCTIONS** | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT You can list up to two deductible expenses for line 23 such as a safe deposit box. (If none, leave the boxes empty) Tax preparation fees $ Description of other deductible expense (1) Amount $ Description of other deductible expense (2) Amount $ BACK NEXT
Click 'Next'	PERSONAL | DEPENDENTS | INCOME | CREDITS | **DEDUCTIONS** | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT You can list up to five miscellaneous deductible items. If you are declaring gambling losses, enter them in the first box. (If none, leave the boxes empty) Miscellaneous Item Description (1) Amount $ ☐ Check here if you declared gambling losses in the first box Miscellaneous Item Description (2) Amount $ Miscellaneous Item Description (3) Amount $ Miscellaneous Item Description (4) Amount $ Miscellaneous Item Description (5) Amount $ BACK NEXT
Maria does want to use I-CAN! for her State return.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | **STATE** | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you want to use I-CAN!® for your State return? ◉ Yes ○ No BACK NEXT

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

The taxpayer can choose to stop at this point and return later if she does not have all of her documentation ready.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | **STATE** | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you have the information below with you? ◉ Yes, continue ○ No, I will come back later BACK **NEXT**
Select 'No' and continue.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | **STATE** | SUMMARY | PRINT | E-FILE | SAVE/EXIT Did you pay for care for a child under age 13 or a disabled dependent so that you (or your spouse if filing together) could work or look for work? ○ Yes ◉ No BACK **NEXT**
Maria qualifies for the California Renter's Credit. Check the following boxes and click 'Next'	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | **STATE** | SUMMARY | PRINT | E-FILE | SAVE/EXIT Do you qualify for the California Renter's Credit? Check all of the following that apply for 2011 ☑ I paid rent for my principal residence for at least half of the year in California ☑ I did **NOT** live with someone, more than half the year, who can claim me as a dependent ☑ The property I rented was **NOT** exempt from property tax ☑ I do **NOT** own a home ☐ (If married) My spouse does **NOT** own a home BACK **NEXT**
Enter '0' in the first box and continue.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | **STATE** | SUMMARY | PRINT | E-FILE | SAVE/EXIT What is the value of your purchases from out-of-state sellers that you made without paying California sales or use tax in 2011? (If none, enter 0) Amount $ 0 How much sales or use tax did you pay to another state for the purchases you entered above? Amount $ In which county are the purchases stored or used? County Select a county if the amount of purchases above is more than zero BACK **NEXT**

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Maria did not make any payments to the California Franchise Tax Board.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Did you make any of the following payments to the California Franchise Tax Board for the 2011 tax year? ○ Yes ⦿ No BACK | NEXT
Click 'Next'	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT (If you itemized your deductions) How much did you deduct for mortgage interest on loans that were not used to buy, build or improve your home? Amount $ (If you itemized your deductions) How much did you receive as a refund for any personal property taxes and real property taxes you deducted? Amount $ (If you itemized your deductions) How much did you deduct for California lottery losses? Amount $ (If you had a business) How much are your additions? (See below) Amount $ (If you had a business) How much are your subtractions? Amount $ BACK NEXT
Click 'Next'	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT Would you like to make a voluntary donation to any of these causes? If so, enter the amount of your donation. CA Senior's Special Fund $ Alzheimer's Disease/Related Disorders Fund $ CA Fund for Senior Citizens $ Rare and Endangered Species Preservation Program $ State Children's Trust Fund for the Prevention of Child Abuse $ CA Breast Cancer Research Fund $ CA Firefighters' Memorial Fund $ Emergency Food Assistance Program Fund $ CA Peace Officer Memorial Foundation Fund $ CA Arts Council Fund $ CA Police Activities League Fund $ CA Veterans Homes Fund $ CA Safely Surrendered Baby Fund $ CA Sea Otter Fund $ CA Cancer Research Fund $ BACK NEXT

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Answer 'Yes' and continue.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | **STATE** | SUMMARY | PRINT | E-FILE | SAVE/EXIT Did you file a California state tax return last year? ◉ Yes ○ No BACK | **NEXT**
This is a summary of the taxpayer's Federal and State return.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | **SUMMARY** | PRINT | E-FILE | SAVE/EXIT Summary Please review your information below. Check to make sure that your **Name(s)** and **Social Security Number(s)** are correct. Check to make sure your total income and the total income withheld from your W-2s and 1099s is correct. My Name : MARIA JIMENEZ 400-00-1111 My Dependent : Cindy Jimenez 400-00-2222 Filing Status : HOH Total Income : $13270 Federal Taxes Withheld : $1330 **Earned Income Credit** : $3094 **Federal Refund** : $4424 CA Taxes Withheld : $1464 **CA Refund** : $1464 **We have calculated that your Federal standard deduction is larger than your Federal itemized deduction. The above totals reflect the use of the larger deduction to give you the most refund or least tax owed.** If anything is incorrect, click on the tabs on the top of the screen to change your answers. If the information is correct, Click "Next" to continue. BACK **NEXT**

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

The taxpayer should review their documents. They can go back and add anything they have forgotten – as long as they have not yet E-filed their returns.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | **SUMMARY** | PRINT | E-FILE | SAVE/EXIT BACK **NEXT** **Have you entered all of your income and deductible expenses?** You should have entered all of the taxable income you (and your spouse if filing together) received, including: • A W-2 from EVERY EMPLOYER you had during 2011 • Any 1099 income including 1099-INT, 1099-G, 1099-MISC, 1099-C, 1099-A, SSA-1099, RRB-1099, 1099-R, 1099-DIV, 1099-SA, 1099-B • Any taxable income that is not reported on a W-2 or 1099 (including Business income, Capital Gains and Loss, Rental and Royalty income, Unreported Tips, Gambling income, Cash, Checks, Scholarships, Household Employee Wages, Jury Pay, Hobby Income, and Alimony) You should have entered all the deductible expenses you (and your spouse, if filing together) had, including: • Business expenses (in the INCOME section) • Dependent Care, Education (1098-T) , Student Loan Interest (1098-E), IRA contributions, Advance Tax Payments, Educator Expenses, Self-Employed Health Insurance, Moving Expenses, Residential Energy Efficient Property, Health Savings Account Contributions, First-Time Homebuyer (in the CREDITS section) • Itemized deductions (in the DEDUCTIONS section)
Maria wishes to have her tax refund direct deposited.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | **SUMMARY** | PRINT | E-FILE | SAVE/EXIT Do you want to direct deposit your Federal refund into one or more accounts? (•) Yes ( ) No BACK **NEXT**
Enter the following information and click 'Next'	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | **SUMMARY** | PRINT | E-FILE | SAVE/EXIT Where do you want your Federal refund to be deposited? Routing number 322271627 Account number 1234567890 What kind of account is it? (•) Checking ( ) Savings Do you want to deposit part of your Federal refund in another account or use part of your refund to buy US Savings Bonds? ( ) Yes (•) No BACK **NEXT**

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Select 'Yes' and re-enter the account information.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | **SUMMARY** | PRINT | E-FILE | SAVE/EXIT Do you want to direct deposit your State refund into an account? ◉ Yes ○ No (If you answered "Yes") Where do you want your refund to be deposited? Routing number 322271627 Account number 1234567890 (If you answered "Yes") What kind of account is it? ◉ Checking ○ Savings BACK NEXT
Print.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | **PRINT** | E-FILE | SAVE/EXIT BACK NEXT Printing On the next screen you will see a list of links to your 2011 Tax forms. Open each form and do the following: 1. Review each of your 2011 Tax forms. Make sure your information is correct and check to see that you are receiving the credits you think you should receive. **It is your responsibility to make sure that your information is complete and correct.** 2. Once you are satisfied, print each of your forms for your records. 3. Continue to E-file your return. If you want to make any changes to your information, click on a tab above to review your answers. Click "Next" to continue.
The taxpayer should review and print their forms.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | **PRINT** | E-FILE | SAVE/EXIT Print your forms Click on each blue link below to open each 2010 Tax form (it will open in a new window). You can then print each form or save it to your computer. You need Adobe Reader to open the files. Click here to install Adobe Reader for free. Federal Mailing Instructions (Print only if you will mail your return) Federal Form 1040A Form 1040A EIC Worksheet Form 1040/1040A Schedule EIC California Mailing Instructions (Print only if you will mail your return) CA Form 540 CA Schedule W-2 BACK NEXT

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Always check your forms to ensure all the information is accurate.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | **E-FILE** | SAVE/EXIT BACK | **NEXT** **Be sure to check your forms** You should have checked to make sure all of the income and deductible expenses you entered appear on your forms. If you believe you are eligible for a credit that you didn't see in your forms, check your answers to the questions for the credit to make sure you are eligible to receive it. For more information about the credits and deductions I-CAN!® can help you claim, click on the link at the bottom of the screen that says "FAQ". If you have any questions, click on the link at the bottom of the screen that says "Need Help?". Click "Next" to continue.
E-File Maria wishes to e-file her Federal and State returns.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | **E-FILE** | SAVE/EXIT Would you like to e-file your Federal and State returns? ◉ Yes, I want to e-file both. (If one return is already accepted through I-CAN!® and you want to e-file the other, select this option) ○ No, I want to e-file my Federal return ONLY. I will mail in my State return. ○ No, I will mail in both returns. BACK **NEXT**
Maria is happy to contribute to I-CAN! E-File.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | **E-FILE** | SAVE/EXIT **Contribute what you want to I-CAN!®** I-CAN!® E-File is offered FREE as a public service by Legal Aid Society of Orange County (LASOC), a non-profit organization. To help us continue this service, we invite you to contribute what you want to I-CAN!®. We believe I-CAN!® E-File is a great value at $9.99. Please contribute the amount you think is reasonable. Would you like to contribute to I-CAN!®? ◉ Yes ○ No BACK **NEXT**

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

It's easy to contribute using a credit card or e-check! You can also print a receipt for your records.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | **E-FILE** | SAVE/EXIT Please verify your payment information below. Contribution: $ 50.00 Credit Card Type: Visa Credit Card Number: 1234123412341234 Name on the Credit Card: Maria L. Jimenez Expiration Date: 11/13/2013 By clicking the 'NEXT' button you agree to pay the charges listed above with your credit card or checking account. BACK | **NEXT**
To E-file Federal and State returns, the taxpayer must select a five digit PIN (Personal Identification Number).	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | **E-FILE** | SAVE/EXIT Do you have a federal self-select PIN from last year's tax return? (•) Yes ( ) No BACK **NEXT** **Self-Select PIN** If you e-filed your 2010 return, you selected a five digit PIN (personal identification number) to act as your signature on your return. If you did not e-file last year, answer "No". If you e-filed last year but you do not now know your PIN, **you can request an Electronic Filing PIN (EFP) from the IRS**. To request an Electronic Filing PIN from the IRS using the Help application online, click here. You can also call the IRS at 1-866-704-7388 and follow the automated system instructions. You will need the following information to request your EFP. This information is on your 2010 tax return: • Social Security Number • First and Last name • Date of Birth • Filing Status • Your complete mailing address as it appeared on your 2010 tax return On the next screen, you will also select a new PIN for your federal return. If you are filing a state return you may also need to select a new PIN for your state return.

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Federal PIN	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | E-FILE | SAVE/EXIT

Federal AGI and PIN from last year

Your Federal AGI (Adjusted Gross Income) from last year is found on your federal tax return from last year. It is the amount on line 37 of the 1040, line 21 of the 1040A, or line 4 of the 1040-EZ. If you filed together with your spouse last year, your AGI from last year will be the same.

Either your federal PIN or AGI from last year must match the IRS records for your return to be accepted. Since you are entering your PIN, you do not need to enter your AGI, but we highly recommend that you do. If you do not know your PIN from last year, click "BACK" and follow the instructions to request an Electronic Filing PIN from the IRS.

Perjury Statement Under penalties of perjury, I declare that I have examined this return, including any accompanying statements and schedules and, to the best of my knowledge and belief, it is true, correct, and complete.

Consent to Disclosure I consent to allow my Intermediate Service Provider, transmitter, or Electronic Return Originator (ERO) to send my return/form to IRS and to receive the following information from IRS: a) an acknowledgement of receipt or reason for rejection of transmission; b) an indication of any refund offset; c) the reason for any delay in processing or refund; and, d) the date of any refund.

New Federal PIN

I am signing this Tax Return/Form and Electronic Funds Withdrawal Consent, if applicable, by entering my PIN below.

Your federal PIN from last year/Electronic Filing PIN (See above)

12345

Your Date of Birth (MM/DD/YYYY)

02/12/1965

Your AGI from last year (optional)

$

Your new federal PIN
(Choose any five digit number except "00000")

12345

(If you are married filing together, enter the following information)

Your spouse's federal PIN from last year/Electronic Filing

Your spouse's Date of Birth (MM/DD/YYYY)

Your spouse's AGI from last year (optional)

$

Your spouse's new federal PIN
(Choose any five digit number except "00000")

Date

2/1/2012

Note: To expedite processing of your return on re-submissions, this date may be adjusted forward to the current date during transmission.

BACK | NEXT

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

California PIN

PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | **E-FILE** | SAVE/EXIT

California AGI from last year

Your California AGI (Adjusted Gross Income) from last year is found on your California tax return from last year. It is the amount on line 17 of form 540, line 17 of form 540A or line 16 of form 540 2EZ. If you filed together with your spouse last year, your AGI from last year will be the same. If you do not have a record of your California tax return from last year, you can call the FTB at 1-800-353-9032 and ask for your California AGI from last year.

New California PIN

Perjury Statement Under penalties of perjury, I declare that I have examined this 2010 California income tax return, including any accompanying statements and schedules, and that, to the best of my knowledge and belief, the information is true, correct, and complete.

Consent to Disclosure I consent to allow my Electronic Return Originator, Transmitter, or Intermediate Service Provider to send my return to the Franchise Tax Board (FTB). Additionally, I consent to allow the FTB to reply with an acknowledgment of receipt indicating whether or not my return was accepted, and, if rejected, the reason(s) for the rejection. If the processing of my return or refund is delayed, I authorize the FTB to disclose the reason(s) for the delay or when the refund was sent.

I am signing this Tax Return, and Electronic Funds Withdrawal Consent if applicable, by entering my Self-Select PIN below.

Your California AGI from last year (See above)
$ 2456
Your new California PIN
(Choose any five digit number except "00000")
12345

(If you are married filing together, enter the following information)

Your spouse's California AGI from last year
$
Your spouse's new California PIN
(Choose any five digit number except "00000")

Date
2/1/2012
Note: To expedite processing of your return on re-submissions, this date may be adjusted forward to the current date during transmission.

If you are not paying with an Electronic Funds Withdrawal you will need to send in your payment by check or money order. Click here to print a California payment voucher.

BACK | NEXT

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Confirm that you want to E-file your forms. Once you E-file you will not be able to change your information.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | **E-FILE** | SAVE/EXIT Are you ready to e-file now? ◉ Yes, e-file my return now ○ No, I want to continue editing BACK **NEXT** Please review your forms to make sure your information is correct and complete before you e-file. **ONCE YOU E-FILE YOU CANNOT CHANGE YOUR INFORMATION.** If you discover that you forgot to enter some income or a deductible expense after your return is accepted, you will need to amend your return and you cannot do this using I-CAN!®. To make any changes or review your information before you e-file, select one of the tabs above.
You must return to I-CAN! E-File the next business day to check the status of your returns.	PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | **E-FILE** | SAVE/EXIT BACK **NEXT** **The Next Step to E-file** You have completed the first step of e-filing. You cannot change any of your information. You do not need to mail any forms to the IRS or your state. Your e-file status is now **"PENDING"**. **To complete the next step of e-filing,** you must return to I-CAN!® to check your e-file status: 1. Come back to I-CAN!® on the next business day to check the status of your federal return. 2. Click on "Check My E-file Status". 3. Log in to your return with your username and password. If your federal status is "pending" or "rejected" that means that you have not yet filed your return. **YOUR TAX RETURN IS NOT FILED UNTIL YOUR STATUS IS "ACCEPTED".** If you also e-filed your state return, after your federal return is accepted, come back to I-CAN!® in 2 business days (not including weekends) to check the status of your state return. Click "Next" to learn about the E-filing Accept and Reject process.

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

PERSONAL | DEPENDENTS | INCOME | CREDITS | DEDUCTIONS | STATE | SUMMARY | PRINT | **E-FILE** | SAVE/EXIT

BACK NEXT

E-filing Accept and Reject Process

When you return to I-CAN!® to check your status, your status will have changed from "PENDING" to either "ACCEPTED" or "REJECTED".

- If your status is **"REJECTED"**, the I-CAN!® status page will tell you what to do to correct your return so that you can e-file again. After you e-file again, come back to I-CAN!® on the next business day to check your updated status.
- Once your status is **"ACCEPTED"**, your tax return will be filed with the IRS. If you also e-filed your state return, after your federal return is accepted, come back to I-CAN!® in 2 business days (not including weekends) to check the status of your state return. At this point, if you owe taxes and chose not to set up an electronic fee withdrawal (EFW), you should send your payment voucher(s) to the IRS and/or your state. If you are due a refund, you can go to I-CAN!® and click the links under the title "Where's my refund?" to track your federal and/or state refund(s).

YOUR TAX RETURN IS NOT FILED UNTIL YOUR STATUS IS "ACCEPTED".
If your status is "PENDING" or "REJECTED" that means that you have not yet filed your return.

Click "Next" to continue.

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

YOUR TAX RETURN IS NOT FILED UNTIL YOUR STATUS IS 'ACCEPTED'

I-CAN!® RETURNING MONEY TO YOU AND YOUR FAMILY

STATUS | EXIT

We would like your feedback on I-CAN!®. To help us by taking a short survey, click 'NEXT'.If you want to exit, click the "Exit" tab and close your window to keep your data secure.

BACK NEXT

E-FILE STATUS

Federal Return

- [x] Finished answering questions.
- [x] Printed Federal return.
- [ ] E-filed Federal Return. Your federal e-file status is: PENDING. *Your federal return is being processed by the IRS.*

YOUR FEDERAL TAX RETURN IS NOT FILED UNTIL YOUR STATUS IS "ACCEPTED". Come back on the next business day to check your updated status.

State Return

- [x] Finished answering questions.
- [x] Printed State return.
- [ ] E-filed State Return. Your state e-file status is: PENDING. *Your state return is being processed by your state.*

YOUR STATE TAX RETURN IS NOT FILED UNTIL YOUR STATUS IS "ACCEPTED". Come back in 2 business days to check your updated status.

Federal Extension

- [ ] Finished answering questions.
- [ ] Printed Federal Extension.
- [ ] E-filed Federal Extension. Your federal extension e-file status is: NOT E-FILED.

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

Additional Scenario:

Name: Johnny Depp
SS#: 547-38-5933
Date of Birth: 01-30-1963
Occupation: Actor
Email: JDepp@hotmail.com
You are not a dependent
You are married
Street Address: 567 Ocean Ave.
City: Malibu
State: CA
Zip code: 94784
Phone number: (213) 245-9944
Select California for tax preparation
You worked in 2010
Spouse – Cindy L. Depp   SSN: 564-33-3939
You are married but not filing with your spouse
You were not a student
You were not a dependent
You did not pay or receive alimony
You received only a W-2G for 2011
Your employer does not assist with dependent care
You have one dependent
Dependent Name: Jimmy Depp
SS#: 555-44-3333
Date of Birth: 5-6-97
Jimmy is your son
Jimmy is not disabled
Jimmy is not married
No one else can claim Jimmy
Jimmy is in grade school
You provided all of Jimmy's support
You paid for all the cost of keeping up a home for Jimmy
Jimmy was a member of your household for all of 2011
Jimmy had no income
Jimmy is a U.S. citizen and lived in the U.S all year

Copyright 2011 © All rights reserved Legal Aid Society of Orange County

3232 ☐ CORRECTED

PAYER'S name Pechanga Casino Street address 333 Pala Road City, state, and ZIP code Temecula, CA 92323	1 Gross winnings 25,000.00	2 Federal income tax withheld 12,000.00	OMB No. 1545-0238 2011 **Form W-2G** **Certain Gambling Winnings**
	3 Type of wager Keno	4 Date won 02 : 14 : 2008	
	5 Transaction	6 Race	
Federal identification number 35-2020202 / Telephone number (916) 234-1919	7 Winnings from identical wagers	8 Cashier	
WINNER'S name Johnny Depp Street address (including apt. no.) 567 Ocean Ave City, state, and ZIP code Malibu, CA 94784	9 Winner's taxpayer identification no.	10 Window	For Privacy Act and Paperwork Reduction Act Notice, see the **2011 General Instructions for Forms 1099, 1098, 5498, and W-2G.**
	11 First I.D.	12 Second I.D.	
	13 State/Payer's state identification no. 35-1234567	14 State income tax withheld 3,000.00	**File with Form 1096.**

Under penalties of perjury, I declare that, to the best of my knowledge and belief, the name, address, and taxpayer identification number that I have furnished correctly identify me as the recipient of this payment and any payments from identical wagers, and that no other person is entitled to any part of these payments.

Signature ▶ **Date ▶**

Copy A
For Internal Revenue Service Center

Form **W-2G** Cat. No. 10138V Department of the Treasury - Internal Revenue Service

Copyright 2011 © All rights reserved Legal Aid Society of Orange County