

NoRTH International Tax Clinic

DIY-Taxes using TaxSlayer

An IRS FSA (Facilitated Self-Assistance) Tax Clinic

This guide is intended to assist in preparing tax year 2023 federal and state income tax returns for nonresident aliens.

ISP MUST REVIEW your tax return BEFORE e-filing or submission by postal mail.

This guide covers:

E-Filing Your Tax Returns

IRS Required Disclosures

Your
Civil Rights
are
PROTECTED

Sus Derechos Civiles
están **PROTEGIDOS**

In accordance with federal law and the Department of the Treasury – Internal Revenue Service policy, discrimination against taxpayers on the basis of race, color, national origin (including limited English proficiency), disability, sex (in education programs or activities), age or reprisal is prohibited in programs and activities receiving federal financial assistance.

Taxpayers with a disability may request a reasonable accommodation and taxpayers with limited English proficiency may request language assistance to access service.

De acuerdo con la ley federal y la política del Departamento del Tesoro - Servicio de Impuestos Internos, la discriminación contra los contribuyentes basada en raza, color, origen nacional (incluso el dominio limitado del inglés), discapacidad, género (en los programas educativos o actividades), edad o represalia, está prohibida en los programas o actividades que reciben asistencia financiera federal.

Los contribuyentes con una discapacidad pueden solicitar acomodo razonable y contribuyentes con un dominio limitado del inglés podrán solicitar asistencia con el idioma para tener acceso al servicio.

Operations Director,
Civil Rights Division
Internal Revenue Service
Room 2413
1111 Constitution Avenue, NW
Washington, DC 20224



If a taxpayer believes he or she has been discriminated against, a written complaint should be sent to the address referenced within. For all other inquiries concerning taxpayer civil rights, contact us at the mailing address or e-mail us at edi.civil.rights.division@irs.gov

Do not send tax returns or other tax-related information to the Civil Rights Division office or e-mail address.

Si un contribuyente cree que él o ella ha sido discriminado, debe enviar una queja por escrito al IRS, a la dirección de referencia. Para todas las demás consultas relacionadas a los derechos civiles del contribuyente, comuníquese a la dirección que aparece a la izquierda o envíenos un correo electrónico a edi.civil.rights.division@irs.gov

No envíe declaraciones de impuestos u otra información que no esté relacionada con los derechos civiles, a la oficina de la División de Derechos Civiles o al correo electrónico.

VITA/TCE Free Tax Programs

The mission of these programs is to provide free basic tax return preparation for low-to-moderate income and elderly taxpayers. This also includes taxpayers with disabilities, limited English proficiency and the Military.

Volunteers participating in these programs must sign a Form 13615, Volunteer Standards of Conduct Agreement - VITA/ TCE Programs. These agreements require them to provide high quality service and uphold the highest ethical standards.

While the IRS is responsible for providing oversight requirements to Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) programs, these sites are operated by IRS-sponsored partners who manage IRS-required site operations and volunteer ethical standards. In addition, the locations of these sites may not be in or on federal property.

To report unethical behavior to IRS, e-mail us at wl.voltax@irs.gov



Programas de Impuestos Gratuitos Ofrecidos por VITA/TCE

El Servicio de Impuestos Internos (IRS, por sus siglas en inglés), patrocina los programas de Asistencia Voluntaria al Contribuyente para la preparación de los Impuestos sobre el ingreso (VITA, por sus siglas en inglés), y el de Asesoramiento Tributario para las Personas de Edad Avanzada (TCE, por sus siglas en inglés).

La misión de estos programas es proporcionar la preparación gratuita de las declaraciones de impuestos sencillas a los contribuyentes de ingresos bajos a moderados y contribuyentes de edad avanzada. Esto incluye también a los contribuyentes con discapacidades, aquellos con dominio limitado del inglés y la milicia.

Aunque el IRS es responsable de proporcionar los requisitos de supervisión para los programas de Asistencia Voluntaria al Contribuyente (VITA) y de Asesoramiento Tributario para las Personas de Edad Avanzada (TCE), estos sitios son operados por socios patrocinados por el IRS que administran las operaciones requeridas por el sitio y los estándares de ética de los voluntarios. Además, es posible que las ubicaciones de estos sitios no estén en la propiedad federal.

Los voluntarios que participan en estos programas, tienen que firmar el Formulario 13615, Volunteer Standards of Conduct Agreement - VITA/ TCE Programs (Acuerdo de los estándares de conducta de los voluntarios de los programas de VITA/TCE), en inglés. Estos acuerdos exigen que ellos proporcionen un servicio de alta calidad y mantengan los más altos estándares éticos.

Para denunciar un comportamiento no ético al IRS, envíenos un correo electrónico a wl.voltax@irs.gov

WARNING!

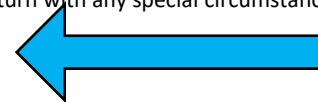
- The TaxSlayer software is not “smart”!
 - Just because you can create a return that shows a particular amount of tax owed or a refund, or any number in any particular spot, does NOT mean that the return is correct.
- It is your responsibility to correctly prepare your tax return.
 - When you sign to send it in, you are signing under penalties of perjury that the return is true, correct, and complete.
 - We have provided aides to assist you in this process, and opportunities to talk to trained volunteers about how to prepare your return, but ultimately it is up to you to ensure that your return is correct.
 - As an IRS VITA clinic, the volunteers and organizations who assist you are not liable for any incorrect information in your return.
 - If the return you prepare is incorrect, YOU will be responsible for any additional tax, interest, or penalties that you may owe the IRS or any other tax authorities.

Tax Process Overview

Create a personalized guide and you'll only get the steps and pages that you need to prepare and file your federal and state tax returns!

Nonresidents

- Get Ready
 - Gather your income documents
 - Confirm your return is in scope
- Do Your Taxes
 - Option 1: Create and use a Personalized Guide
 - Create your personalized guide
 - Prepare your return
 - File your return
 - Option 2: Use tools, basic, and special circumstances guides
 - Confirm your federal tax residency status for 2023
 - Determine if you need to file a tax return
 - Determine your treaty benefits
 - Determine which scenarios apply to you
 - Prepare your return using a basic scenario
 - Update your return with any special circumstances scenarios
 - File your return



You should be here in the tax process

Residents

- Get Ready
 - Gather your income documents
 - Confirm your return is in scope
- Do Your Taxes
 - Option 1: Go straight to TaxSlayer, and use their built-in guide
 - Option 2: Create and use a Personalized Guide (coming soon).

ISP MUST REVIEW your tax return BEFORE e-filing or submission by postal mail.

These are the final steps to file your return!

- You must have completed your basic scenario, and any special circumstances scenarios that apply to you.
 - Once you file your return you cannot make changes and resubmit.
 - You will need to file a formal change (called an amended return) to tell the IRS / state Department of Revenue what the change is, and why you are making it.
 - Amended returns are out of scope for our VITA tax clinic, so we will not be able to assist you with this.

If after e-filing you get an error code, please email the error message and code (include screen shot where possible) to ISP. Check your email to make sure federal and state(s) returns are accepted or rejected.

- Your federal 1040-NR and state tax returns can be e-filed in most cases.
 - We strongly recommend that you do e-file if possible.
 - TaxSlayer changed the software to eliminate entry of any spouse information for married nonresident aliens.
 - If you are married you will generally be able to e-file your federal return
 - This change will prevent an issue that caused many individuals to have to delete and re-create their returns last year.
 - If you are married you cannot e-file your state return.
 - Please see the paper filing guide for specifics about how to paper file state tax returns.
 - You will receive an e-file acknowledgement when your return has been accepted.
 - The federal acceptance is first, and usually comes within 24 hours of submission (often sooner).
 - The state is submitted only after the federal is accepted, and a state acceptance usually arrives 1-2 days after submission.
 - The IRS is currently stating that they have returned to near normal return processing times, and it should typically take **2 - 4 months** to process a 1040NR return and for you to receive your refund. Returns with a 1042-S included often will take longer - **6 - 8 months** - to receive a refund.

Information to E-file your 2023 tax returns

- You will need your 2022 Adjusted Gross Income (AGI)
 - If you did not file a 2022 federal tax return, your AGI is \$0.
 - If you did, pull out your returns from last year.
 - If you filed with TaxSlayer last year, this may be copied over for you!

Adjusted Gross Income

- 1040-NR Line 11

Form 1040-NR Department of the Treasury—Internal Revenue Service (99) **2021** OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing Status ☒ Single ☐ Married filing separately (MFS) ☐ Qualifying widow(er) (QW)
 Check only one box. If you checked the QW box, enter the child's name if the qualifying person is a child but not your dependent ▶

Your first name and middle initial SUNIL Last name GOSAIN Your identifying number (see instructions) 111-12-3333

Home address (number and street or rural route). If you have a P.O. box, see instructions. 200 UNIVERSITY AVE Apt. no. 15 Check if: ☒ Individual ☐ Estate or Trust

City, town, or post office. If you have a foreign address, also complete spaces below. MINNEAPOLIS State MN ZIP code 55455

Foreign country name Foreign province/state/county Foreign postal code

At any time during 2021, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency? ☐ Yes ☒ No

Dependents (see instructions):	(1) First name	Last name	(2) Dependent's identifying number	(3) Dependent's relationship to you	(4) <input checked="" type="checkbox"/> if qualifies for (see inst.): Child tax credit	Credit for other dependents
If more than four dependents, see instructions and check here <input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>

Income Effectively Connected With U.S. Trade or Business	1a Wages, salaries, tips, etc. Attach Form(s) W-2	1a	<u>41000</u>
	b Scholarship and fellowship grants. Attach Form(s) 1042-S or required statement. See instructions	1b	
	c Total income exempt by a treaty from Schedule OI (Form 1040-NR), Item L, line 1(e)	1c	
	2a Tax-exempt interest	2a	
	3a Qualified dividends	3a	
	4a IRA distributions	4a	
	5a Pensions and annuities	5a	
	6 Reserved for future use	6	
	7 Capital gain or (loss). Attach Schedule D (Form 1040) if required. If not required, check here <input type="checkbox"/>	7	
	8 Other income from Schedule 1 (Form 1040), line 10	8	
	9 Add lines 1a, 1b, 2b, 3b, 4b, 5b, 7, and 8. This is your total effectively connected income	9	<u>41000</u>
	10 Adjustments to income:		
	a From Schedule 1 (Form 1040), line 26	10a	
	b Reserved for future use	10b	
	c Scholarship and fellowship grants excluded	10c	
	d Add lines 10a and 10c. These are your total adjustments to income		
	11 Subtract line 10d from line 9. This is your adjusted gross income	11	<u>41000</u>
	12a Itemized deductions (from Schedule A (Form 1040-NR)) or, for certain residents of India, standard deduction. See instructions	12a	<u>12550</u>
	b Charitable contributions for certain residents of India. See instructions	12b	
	c Add lines 12a and 12b	12c	<u>12550</u>
	13a Qualified business income deduction from Form 8995 or Form 8995-A	13a	
	b Exemptions for estates and trusts only. See instructions	13b	
	c Add lines 13a and 13b (Standard Deduction Allowed Under U.S.-India Income Tax Treaty)	13c	
	14 Add lines 12c and 13c	14	<u>12550</u>
	15 Taxable income. Subtract line 14 from line 11. If zero or less, enter -0-	15	<u>28450</u>

Information to E-file your 2023 tax returns

- If you filed a 2022 federal tax return, but cannot find your copy, you can request a transcript of your return to get your AGI.
 - You can immediately view your transcript / AGI here:
 - Create an online account at the IRS: <https://www.irs.gov/payments/your-online-account>
 - Once the account is created you can access your transcript.
 - You can also see your refund status, check payment status, and other tasks
 - Request online at: <https://www.irs.gov/individuals/get-transcript>
 - You must pass the secure access identity verification process to get into either of these systems.
 - If you cannot pass the secure access system, you can request a copy by mail:
 - Call 1-800-908-9946
 - Request by mail at: <https://www.irs.gov/individuals/get-transcript>
 - This will be sent to the mailing address that the IRS has on file for you.
 - This will take a while, so do it as soon as possible.

Getting a Refund / Making a Payment

- If you are getting a refund, you can have that refund direct deposited to a U.S. checking or savings account.
 - We strongly recommend that you do this!
 - You will get your money faster, and a bank account doesn't move, even if you do.
 - You will need to gather your bank routing and account numbers
- If you owe money, you can pay by check, credit/debit card, or by electronic withdrawal from a checking or savings account
 - You will be charged extra fees to pay by credit/debit card
 - We recommend doing an electronic withdrawal. It's free, and you can schedule the date you want the withdrawal to happen.
 - For a federal or state payment, you can schedule this when you e-file

Accessing TaxSlayer – Log into your account


Welcome to the TaxSlayer VITA/TCE self-prep kiosk

- No current year preparation or electronic filing Fees
- Unlimited current year states
- Access to prepare and e-file 1040-NR
- Access to prepare and e-file 1040PR

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.

Click the Continue button to create a new account or login with an existing account.

CONTINUE



Do NOT go to the main TaxSlayer website.

Your only option on that site will be to pay for your return.

You MUST use the link in the member section of the NRV TAP website.

You will not be charged a fee if you are using the proper link.

You should have a federal and a state return

MY ACCOUNT

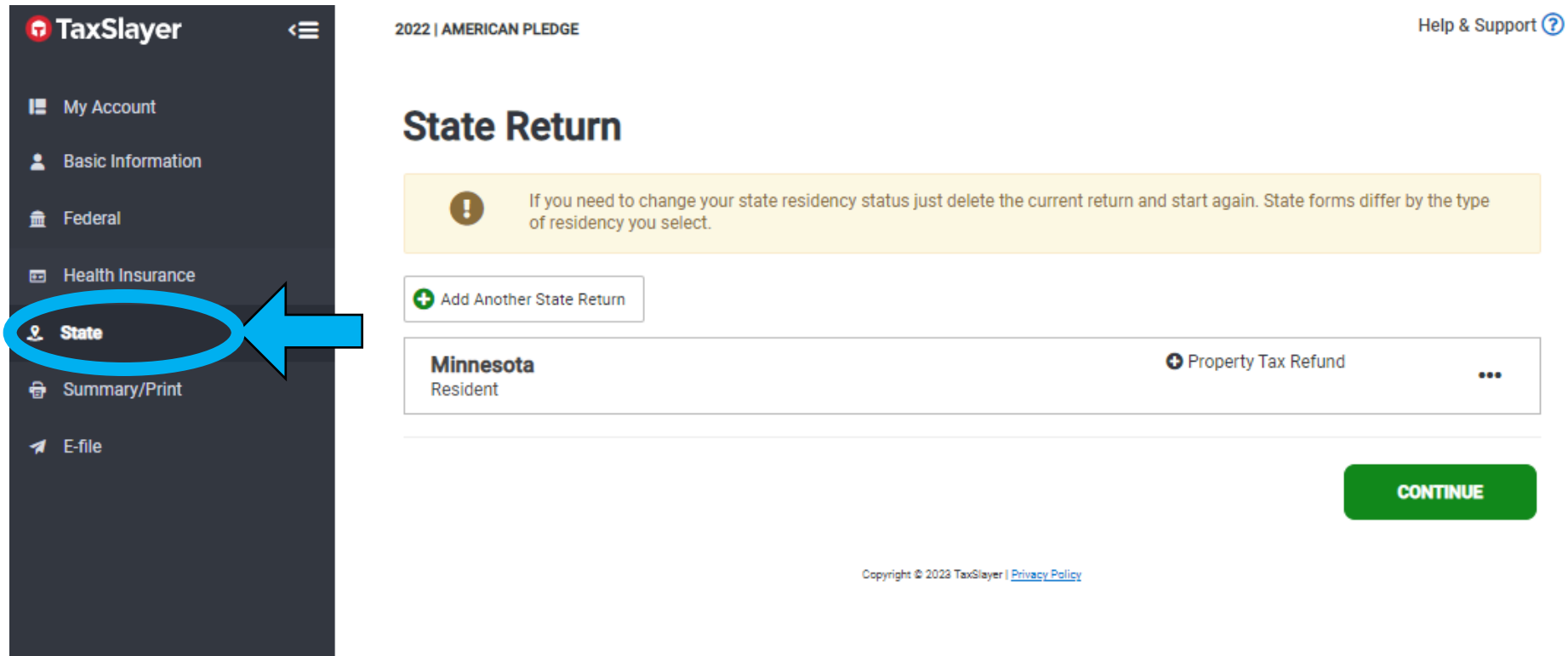
2023 Tax Return

Welcome back! Let's finish your 2023 tax return.



RETURN	STATUS	REFUND AMOUNT
Federal	Created ⓘ	-\$11.00
Minnesota	Created ⓘ	\$0.00

If you aren't already there, click on the state section



The screenshot displays the TaxSlayer website interface. On the left, a dark sidebar contains a menu with the following items: 'My Account', 'Basic Information', 'Federal', 'Health Insurance', 'State', 'Summary/Print', and 'E-file'. The 'State' item is highlighted with a blue circle, and a large blue arrow points to it from the right. The main content area is titled '2022 | AMERICAN PLEDGE' and 'State Return'. It features a yellow warning box with an exclamation mark icon and the text: 'If you need to change your state residency status just delete the current return and start again. State forms differ by the type of residency you select.' Below this is a button labeled '+ Add Another State Return'. A section for 'Minnesota Resident' is shown, including a '+ Property Tax Refund' link and a three-dot menu. A green 'CONTINUE' button is located at the bottom right. The footer contains the text 'Copyright © 2023 TaxSlayer | [Privacy Policy](#)'.

TaxSlayer <≡

- My Account
- Basic Information
- Federal
- Health Insurance
- State**
- Summary/Print
- E-file

2022 | AMERICAN PLEDGE

Help & Support ?

State Return

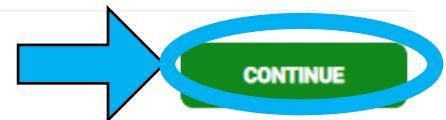


If you need to change your state residency status just delete the current return and start again. State forms differ by the type of residency you select.

+ Add Another State Return

Minnesota
Resident

+ Property Tax Refund



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This will make the return update / recalculate, which might take a few seconds.

There might be some errors for missing information on your federal or state return. Make corrections to fix these.

State Validation Errors

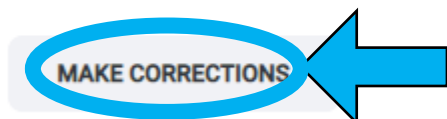
The following state returns will not be sent electronically at this time due to the errors listed below. You may still continue to the e-file process and e-file any other returns you have prepared. However, the returns listed below will NOT be included in the current e-file.

If you are able to fix the problem, please select the 'Make Corrections' button below. Once you have corrected the problems, resubmit your return through the Efile Section.

If the problems indicated are ones that cannot be corrected, you will need to print your state return forms and paper file by mail. You can print your state return(s) by clicking "View Return Summary" from the 1040 Main Menu.

Minnesota

- Spouse Name is required, must be entered on the Federal return.



Note: If you are married you will not be able to e-file your state returns. You can e-file your federal return. See special notes at the end for state paper returns.

There might be some errors for missing information on your federal or state return. Make corrections to fix these if possible.

Errors Concerning Your Federal Return



Something's not quite right

We found an error that needs to be corrected before you can file this return

Click here to try to fix the problem



Our records indicate does not have a valid SSN or ITIN at this time. Select Visit to correct this information.

You will be unable to EFile your Federal Return if you press continue

BACK



Click here if the problem cannot be fixed.

Note: If you can't fix these problems, you will be required to paper file. Please email us (ISP [redacted]) "Get Help" page) before you paper file. We may be able to help you fix the problems and e-file.


You'll get the summary screen once there are no errors.

Check your email to see if your federal (or state) return is accepted. If your e-filed federal return is rejected, TaxSlayer may give you an error code and/or message. Please send ISP a copy of the error code and/or message and include a screenshot if possible. Return must be fixed before e-filing again.

Tax Return Summary



Total Income	\$8,400.00	▼
Adjusted Gross Income	\$8,400.00	▼
Tax and Credits	\$0.00	▼
Total Tax	\$793.00	▼
Payments	\$840.00	▼
Refund	\$47.00	▼
Minnesota Refund	28.00	

 PRINT ▼

[VIEW RETURN](#)

[BACK](#)

[CONTINUE](#)

Before you file, save a
copy of your return!

Tax Return Summary



ISP MUST REVIEW our tax return BEFORE you e-file or submit by postal mail. Download and save a PDF copy of entire federal and state returns. You will need them in the future.

Total Income \$8,400.00 ▾

Adjusted Gross Income \$8,400.00 ▾

Tax and Credits \$0.00 ▾

Total Tax \$793.00 ▾

Payments \$840.00 ▾

Refund

Minnesota Refund

PRINT ▴

Print all

Print Federal

Print State - MN

Print all to save a pdf copy
of your entire return.
Keep this for your records.


CONTINUE

You have no errors, and you have printed a copy. Now you're ready to file your return!

Tax Return Summary



Total Income	\$8,400.00	▼
Adjusted Gross Income	\$8,400.00	▼
Tax and Credits	\$0.00	▼
Total Tax	\$793.00	▼
Payments	\$840.00	▼
Refund	\$47.00	▼
Minnesota Refund	28.00	

 PRINT ▼

[VIEW RETURN](#)

[BACK](#)



Don't miss out.

Unlock access to personalized tax tips, new products and tools, and more ways to receive your refund. Your autograph unlocks:

- ✓ Option to pay with your refund
 - ✓ Personalized tax tips and reminders specific to you
 - ✓ More ways to receive your refund
 - ✓ Access to new tools that make filing faster and easier
 - ✓ Resources to help you manage your financial situation year-round
-



Don't miss this.

Review the legal info below, give us your autograph, and you'll unlock your personalized experience - created just for you.

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

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your Tax Return Information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage our tax return preparation services. If you do not want to consent, simply click "Remind me later" at the bottom of the screen. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

I authorize TaxSlayer to use the Tax Return Information necessary to fulfill the purposes described herein.

PRINT

Ensure the details below are accurate:

Full Name *

Date*

02/11/2024

☐ I am filing a joint return with my spouse.

You do NOT have to say "YES" to this and enter your name.

Just click "NO, THANKS" and keep going!



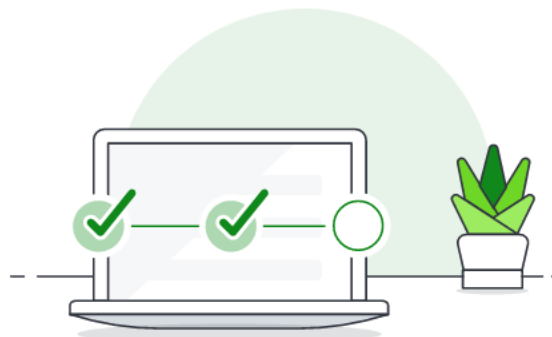
Ready to file?

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

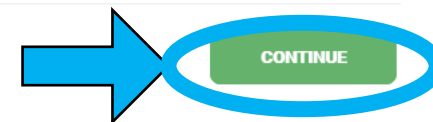
Are you ready to keep going?

☒ Yes, I'm done with my return(s) and ready to file!

☐ No, I'm not ready.



BACK



CONTINUE

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The next series of slides walks through what to do if you are getting a refund or owe a payment – for federal and / or your state returns

Skip through to the section(s) that apply to you.

If you are getting a refund for federal and/or state returns

If you only owe tax, please skip to the payment section

If you owe for federal and are getting a state refund, or vice versa, you may need to jump forwards and backwards in these sections.

Let's get a few more details

You're almost ready to file!

1

Federal

\$47

Refund:

\$47

Refund Method: Select method below

Choose how you want to receive your federal refund.

CONTINUE

2

State

3

Products & Services

\$0


4


Sign & File

BACK

Federal Refund Method

How would you like to receive your **\$47** federal refund?

☐
Direct deposit

☐
Mailed check

Select option – we suggest direct deposit

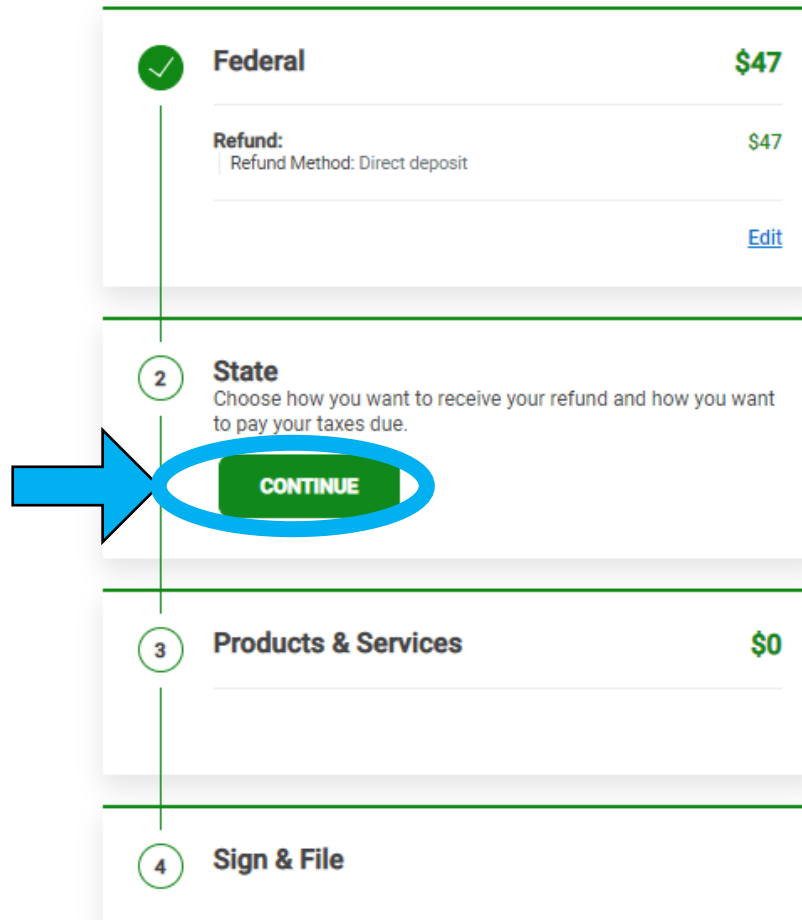
I understand that TaxSlayer has no control over the IRS or the bank and therefore makes no guarantees as to the number of days it takes for you to receive your refund. TaxSlayer will make every effort to expedite your filing process; however, if the IRS delays or holds your refund, TaxSlayer will not be held responsible.

BACK

CONTINUE

Let's get a few more details

You're almost ready to file!



✓	Federal	\$47
Refund:		\$47
Refund Method: Direct deposit		
		Edit
2	State	
Choose how you want to receive your refund and how you want to pay your taxes due.		
CONTINUE		
3	Products & Services	\$0
4	Sign & File	

State will say “No State Returns: if you are not e-filing a state return because you are a married nonresident alien.

BACK

State Refund Method

How would you like to receive your **\$28** Minnesota refund?

The screenshot shows a selection screen for the state refund method. It features three options, each with an icon and a radio button:

- Direct deposit**: Represented by an icon of a money bag with a dollar sign. A blue arrow points to this option.
- Mailed check**: Represented by an icon of a check with a pencil. A light blue arrow points to this option.
- Skip Now / File Later**: Represented by a double right-pointing arrow icon. A red arrow points to this option.

Below the options is a text box that reads: "Select option – we suggest direct deposit".

At the bottom of the screen are two buttons: a grey "BACK" button on the left and a green "CONTINUE" button on the right. A blue arrow points to the "CONTINUE" button, which is also highlighted with a blue oval.

TaxSlayer <<

- My Account
- Basic Information
- Federal Section**
 - Income
 - Deductions
 - Other Taxes
 - Payments & Estimates
 - Miscellaneous Forms
 - COVID-19 Relief
- Health Insurance
- State Section
- Summary/Print
- E-file
- 2020 Amended Return
- Mailbox
- Settings
- Toolbox
- Save & Log Out

If you are getting a property tax refund, you'll be asked about how to receive it.

Most Mac students do not qualify for MN Property Tax Credit refund.

State Refund Method

How would you like to receive your **\$333** MN Property Tax Credit refund?

☐

Direct deposit

☐

Mailed check

☐

Skip Now / File Later

Select option – we suggest direct deposit

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REFUND SUMMARY

Federal	\$1,239
State - MN	\$615

Remember that property tax refunds don't get sent out until August! If you choose a mailed check, make sure your address will still be good when the check is sent.

Let's get a few more details

You're almost ready to file!

✓

Federal

\$47

Refund:

Refund Method: Direct deposit

\$47

[Edit](#)

✓

State

Minnesota

Refund Method: Direct deposit

\$28

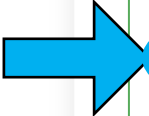
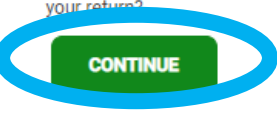
[Edit](#)

3

Products & Services

\$0

Next, how do you want to pay for your fees associated with your return?

  **CONTINUE**

4

Sign & File

Let's get a few more details

You're almost ready to file!



Federal

\$47

Refund:

\$47

Refund Method: Direct deposit

[Edit](#)



State

Minnesota

\$28

Refund Method: Direct deposit

[Edit](#)



Products & Services

\$0

TaxSlayer Efile

Free

MN Return

Free

Fees should be \$0!!!



Sign & File

There's just a few more things for you to sign and then you'll be done!

CONTINUE

Let's get a few more details

You're almost ready to file!

✓

Federal

\$47

Refund:

Refund Method: Direct deposit

[Edit](#)

✓

State

\$28

Minnesota

Refund Method: Direct deposit

[Edit](#)

✓

Products & Services

\$19.95

TaxSlayer Efile

\$19.95

MN Return

Free

[Already have a promo code?](#)

4

Sign & File

There's just a few more things for you to sign and then you'll be done!

CONTINUE

If your fees are not \$0, Select Continue, then Select Back.

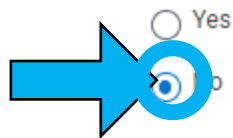
That should reset the fees to \$0.

Contact us if you still have issues.

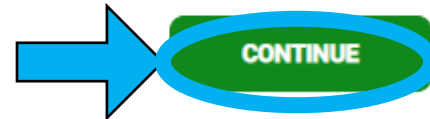
Say yes if you want to invest your refund in U.S. savings bonds. The software will walk you through the steps to do this.

Want to invest your refund?

Do you want to put any of your refund toward savings bonds for yourself or someone else?



BACK



Say yes if you want to split your refund among multiple bank accounts.

Federal Direct Deposit Details

Do you want to deposit your full federal amount into a single bank account?

☒ Yes (most common)

☐ No, I want to split my refund between 2-3 bank accounts.

BACK

CONTINUE

Bank Account Info for direct deposit / payment automatic withdrawal

Bank Account Info

Enter your account information below.

Account nickname



Account type



Checking or Savings

Bank routing number



Account number



BACK




CONTINUE

U.S. Bank Accounts ONLY!

You can click to add another bank account if you want. You can split your refund to multiple accounts, or you can send your federal to one account, and your MN to another,

Bank Accounts

 Add another bank

Bank Account

Account type Checking
account

...

BACK

CONTINUE

MN Direct Deposit Details

Which bank account do you want your **\$28** Minnesota refund deposited into?

[Edit Bank Accounts](#)

☐ Bank Account

BACK

CONTINUE

If you owe a payment for federal and/or state returns

If you already entered your refund information,
skip to the final filing steps [go to pg 51.](#)

If you owe money, now you can choose how you want to pay the tax

Let's get a few more details

You're almost ready to file!

1 **Federal** **-\$103**

Taxes due: **-\$103**

Payment Method: Select method below

Choose how you want to pay your federal amount owed.

CONTINUE

2 **State**


3 **Products & Services** **\$0**


4 **Sign & File**

More info about payments, including if you need to make a change: <https://www.irs.gov/payments/pay-taxes-by-electronic-funds-withdrawal>

Federal Payment Method

How would you like to pay your federal amount due of **\$103**?

☐
Direct debit

☐
Mailed payment

I understand that TaxSlayer has no control over the IRS or the bank and therefore makes no guarantees as to the number of days it takes for you to receive your refund. TaxSlayer will make every effort to expedite your filing process; however, if the IRS or the bank holds your refund, TaxSlayer will not be held responsible.

BACK

Select option – we suggest direct debit

CONTINUE

Let's get a few more details

You're almost ready to file!

✓

Federal

Taxes due: - \$103

Payment Method: Direct debit

[Edit](#)

2

State

Choose how you want to receive your refund and how you want to pay your taxes due.

CONTINUE

3

Products & Services


4


Sign & File


State will say "No State Returns: if you are not e-filing the MN return because you are married and your spouse does not have a SSN/ITIN

State Payment Method

How would you like to pay your Minnesota amount due of **\$52**?

☐
Direct debit

☐
Mailed payment

☐
Skip Now / File Later

Select option – we suggest direct debit

BACK

CONTINUE

TaxSlayer <<

- My Account
- Basic Information
- Federal Section**
 - Income
 - Deductions
 - Other Taxes
 - Payments & Estimates
 - Miscellaneous Forms
 - COVID-19 Relief
- Health Insurance
- State Section
- Summary/Print
- E-file
- 2020 Amended Return
- Mailbox
- Settings
- Toolbox
- Save & Log Out

If you are getting a property tax refund, you'll be asked about how to receive it. This is always a refund, you will never owe, even if you owe other federal or MN taxes

ppport

REFUND SUMMARY

Federal	\$1,239
State - MN	\$615

State Refund Method

How would you like to receive your **\$333** MN Property Tax Credit refund?

☐

Direct deposit

☐

Mailed check

☐

Skip Now / File Later

Select option – we suggest direct deposit

BACK

CONTINUE

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Remember that property tax refunds don't get sent out until August! If you choose a mailed check, make sure your address will still be good when the check is sent.

Let's get a few more details

You're almost ready to file!

✓

Federal

-\$103

Taxes due: **-\$103**
Payment Method: Direct debit

[Edit](#)

✓

State

Minnesota **-\$52**
Payment Method: Direct debit

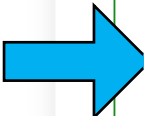
[Edit](#)

3

Products & Services

\$0

Next, how do you want to pay for your fees associated with your return?

 **CONTINUE**

4

Sign & File

State will say "No State Returns: if you are not e-filing the state return because you are a married nonresident alien

Let's get a few more details

You're almost ready to file!

✓	Federal	-\$83	▼
✓	State	-\$67	▼
✓	Products & Services	\$0	▼
4	Finish & File	^	

There's just a few more things for you to sign and then you'll be done!

SIGN AND FILE YOUR RETURN

State will say "No State Returns: if you are not e-filing the state return because you are a married nonresident alien

Fees should be \$0!!!

Select your payment information

With which account would you like to pay your amount due of \$103?

☐ Add a bank account

BACK

CONTINUE

Bank Account Info for direct deposit / payment automatic withdrawal

Bank Account Info

Enter your account information below.

Account nickname



Account type



Bank routing number



Account number



BACK



Bank Accounts

My Bank
Account type Checking account

...

BACK



Select your payment information

With which account would you like to pay your amount due of \$103?

[Edit Bank Accounts](#)



My Bank

BACK

CONTINUE

Confirm payment details

Payment amount *

Amount owed: \$103



Enter Payment amount. If you can't pay it all, pay as much as you can to reduce interest and penalties.

Phone number



Phone Number

Payment date

MM	DD	YYYY
▼	▼	▼



Payment is due 04/15/2024. Pay on or before this date.



*** Note:** If you have selected to mail payment for states, this payment only applies to federal tax due and you must still mail the payment in. If payment amount is less than the amount due, you will have to mail the rest of the payment to the IRS with a payment voucher. Please allow 5 business days for the transaction to post to your account.

If you are receiving a refund from your state and have elected for a direct deposit, this bank account will also be used.

BACK



CONTINUE

MN Direct Debit Details

Which bank account do you want your Minnesota amount due debited from?

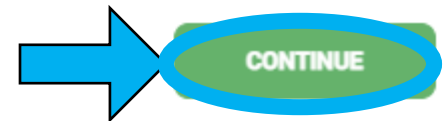
[Edit Bank Account](#)



My Bank



BACK



CONTINUE

There may be no option to select an amount other than what you owe. If you cannot pay the full amount, do not select direct debit for your payment. Go back and select mailed payment, and then you can either mail a check. Depending on the state, you may also be able to pay a different amount electronically on the state's website.

Confirm payment details for Minnesota

Payment amount *

Amount owed: \$52

Payment date

MM ▼	DD ▼	YYYY ▼
------	------	--------

Payment is due 04/15/2024. Pay on or before this date.

BACK

CONTINUE

Final Filing Steps

For all returns – whether you owe or get a refund

ID Information

☒ I do not wish to provide

☐ ID was NOT issued by the United States of America

ID type

-Please select-

Issuer

-Please select-

ID Number

Issue date

MM

DD

YYYY

Expiration date

MM

DD

YYYY

☐ No expiration date

Citizenship

-Please select-

This step is intended to help prevent identity theft.

Your choice:

- Click I do not wish to provide
- Enter ID information if you want
 - You can enter passport information if you want
 - You might not have any of these ID types. Just say "I do not wish to provide" if this applies to you.

BACK

CONTINUE

If you e-filed your return last year and you want to e-file this year, you must enter either:

- Your 2022 AGI
- Your 2022 PIN

Lisa, we need the adjusted gross income (AGI) from your 2022 return. Do you have access to it?

The IRS requires this information to confirm your identity when you file.

- ☐ Yes, I have my 2022 tax return with me.
- ☐ No, I can't locate my 2022 tax return.
- ☐ No, I didn't file a 2022 tax return.



BACK

CONTINUE

Select whichever applies.

If you say “yes” you e-filed, and “no” you do not have access to your return

No worries - you can use your Self-Select PIN from last year's return instead

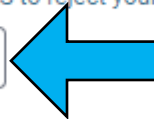


This is a 5-digit PIN that you created last year. We don't have access to it.
This PIN must be correct for the IRS to accept your return.

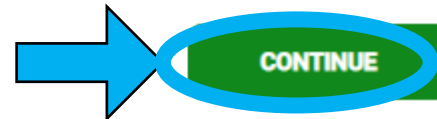
Primary taxpayer - NRV TAP TaxAssistance

2021 5-digit self-select PIN *

Guessing will cause the IRS to reject your return.



CANCEL



If don't remember your PIN and you e-filed last year, then you will need to get a copy of your return to find your AGI.

If you say “yes” you e-filed, and “yes” you have access to your return

Lisa, which type of tax return did you file last year?

Look for the form name in the top-left corner of your federal return.

☐ 1040

☐ 1040NR

☐ 1040X

☐ 1040SR

Select whichever applies – it will probably be 1040NR, but enter whatever you actually filed.

CANCEL

CONTINUE

Enter your 2022 Adjusted Gross Income (AGI)



Located on last year's tax return (Line 11 Form 1040NR)

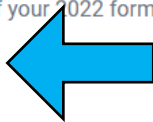
This amount is used by the IRS to confirm your identity. It must be correct for your return to be accepted.

Primary taxpayer - Lisa Hui

2022 Adjusted Gross Income (AGI) *

Located on line 11 of your 2022 form 1040NR. Round to the closest dollar if your AGI includes cents.

\$0



CANCEL



Double check your prior year AGI

This number must be accurate for the IRS to accept your return. To be sure, confirm your AGI below, then select Continue.

Primary taxpayer - Lisa Hui

2022 Adjusted Gross Income (AGI) *

Located on line 11 of your 2022 form 1040NR. Round to the closest dollar if your AGI includes cents.



CANCEL

This is one of the most common reasons why e-file returns get rejected, so check it twice!



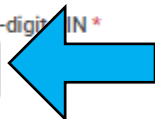
If you say “no” you didn’t e-file, you either did paper or didn’t file at all you jump straight to this screen. If you did e-file and you say “no”, your return may be rejected.

Now, create a Self-Select PIN for this year

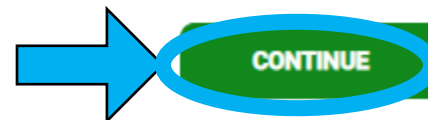
Create a 5-digit PIN for this year’s tax return. We’ll import it for you when you file next year.

*You may be asked for this PIN in the future so the IRS can confirm your identity. We recommend making note of your PIN and keeping track of it.

Taxpayer’s 5-digit PIN *



CANCEL



Pick any PIN you want, try to make it something you can easily remember like your zipcode.

Note: The PIN cannot begin with a 0.

Let's get a few more details

You're almost ready to file!

✓	Federal	\$47
	Refund:	\$47
	Refund Method: Direct deposit	
		Edit

✓	State	
	Minnesota	\$28
	Refund Method: Direct deposit	
		Edit

✓	Products & Services	\$0
	TaxSlayer Efile	Free
	MN Return	Free

✓	Sign & File	
You're all set to file!		
SIGN AND FILE YOUR RETURN		
Tax Year 2023 E-Filing Instructions Edit		

This is it!!!
Click to sign
and e-file your
return!

Need to change
something? Edit to
fix it before it is too
late!



Last step!

Select File Now to submit your return(s).

BACK

FILE NOW

Check your email to see if your federal (or state) return is accepted. If your e-filed federal return is rejected, TaxSlayer may give you an error code and/or message. Please send ISP a copy of the error code and/or message and include a screenshot if possible. Return must be fixed before e-filing again.

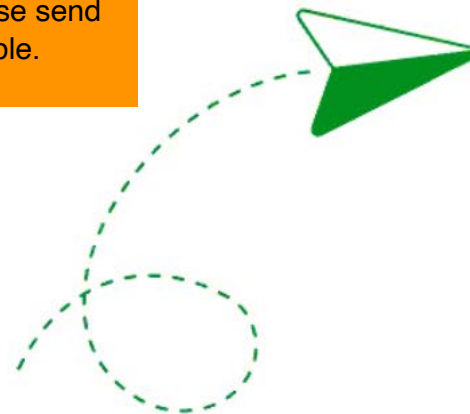
Congratulations

Your tax return has been e-filed

Thank you for trusting us to handle your tax return. Now, we will take you back to My Account to review your e-file status and any messages about your return. Don't forget to tell your friends how easy it was to slay your taxes with TaxSlayer!

TaxSlayer is not involved in the distribution of stimulus payments. The IRS determines who qualifies and sends payments via direct deposit or mailed check (depending on what you provided on your tax return). See more information regarding stimulus payments and COVID-19 economic relief [here](#).

GO TO MY ACCOUNT



Welcome back! Your 2023 tax return has been e-filed.



ACCESS MY RETURN

RETURN	STATUS	REFUND AMOUNT
Federal	Sent	\$472.00
MNM1PR	Sent	\$468.00
Minnesota	Sent	\$216.00

VIEW DETAILS

CONGRATULATIONS!

- You have filed your federal and state tax returns!
- You will need to log back into TaxSlayer to check that your e-file return has been accepted.
 - It should take 10 minutes – 24 hours for your federal return.
 - It should take 1-2 days for your state return after your federal is accepted.
- If your return is rejected, TaxSlayer will give you a reject code and message that will tell you why the return was rejected.
 - You can try to fix that issue and resubmit your return.
 - It's common for a return to be rejected if your name or date of birth don't match what the IRS has (check your return from last year), if there is a typo in the return (check your income documents), or if your entry for the AGI doesn't match.
 - You can try to fix the reject error and resubmit your return multiple times
 - If you try several times and can't fix the problem, try emailing us (see the support email address on your "Get Help" page) and we can try to help you fix the issue. Contact ISP with error messages and code for help.
 - Please send us a screenshot of the reject reason details to help us understand the issue.
 - If you get the message that you must file by paper then you will not be able to e-file, and must submit a paper return.

After your return has been accepted

- Check federal refund status:
 - <https://www.irs.gov/refunds>
- Check state income tax refund status:
 - MN: <https://www.revenue.state.mn.us/wheres-my-refund>
 - PA: <https://mypath.pa.gov/>
 - NC: <https://www.ncdor.gov/refund#Tab-WheresMyRefund-658>
 - CA: <https://www.ftb.ca.gov/refund/index.asp>
 - MD: <https://interactive.marylandtaxes.gov/indiv/refundstatus/home.aspx>

If you need to mail in your state Income Tax Return, see our Paper Filing Instructions

Each state has different requirements, and we go through each of them in that guide.

Thank-you for filing your taxes with us!

We offer free tax preparation help to individuals with a school, nonprofit, or government email address.

Please share our website with others so they can get free tax help, too!

<https://www.nrtaxhelp.org/>