

4.3: Filing Your Federal Taxes


Find out how to file your federal taxes, get an extension, and more.

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Key Tax Tips

Find out the important factors to consider when doing your taxes.

 This infographic explains the important factors to consider when doing your taxes.

 [View a larger version of the infographic.](#)

Show Description of Infographic

File a Federal Income Tax Return

The government collects taxes to pay its bills and provide public goods and services. The Internal Revenue Service (IRS) is the nation's tax collection agency.

The taxes you owe to the government are generally paid through withholding (money taken out of your paycheck), estimated tax payments, and payments made when you file your taxes each year.

You may not have to file a federal income tax return if your income is below a certain amount. However, you must file a tax return to claim a refundable tax credit or a refund on income tax withheld.

- [Find out if you have to file a tax return.](#)

If you have to file a tax return:

- Determine your filing status.
- [See if you qualify for free tax return preparation.](#)
- Choose the simplest form for your tax situation.
- [Figure your taxes and credits.](#)
- [Claim your dependents and exemptions.](#)
- [Determine if you need to pay quarterly estimated taxes.](#)
- [File your taxes online](#) or mail your paper tax return.

Tax Payment Information

There are several ways to pay your federal taxes: direct pay, debit or credit card, electronic federal tax payment system, or check or money order. Find out how to [make a tax payment](#).

Tax Refund Information

If you are expecting a refund, you can [check your federal tax refund status online](#) or call the [Refund Hotline](#). If you have questions about the status of your refund within the first 21 days after filing electronically, the IRS will direct you to the online [Where's My Refund?](#) tool.

You can choose to receive your [tax refund](#) by direct deposit, U.S. Series I Savings Bonds, or paper check.

Contact the IRS

For more information, [contact the IRS](#).

Extension to File Your Tax Return

Do you need more time to prepare your tax return?

If you are unable to file your federal income tax return by the due date, you may be able to get an extension from the Internal Revenue Service (IRS). But this does not grant you more time to pay your taxes.

You may be able to get an automatic six-month extension to file your return. To do so, you must file [IRS Form 4868, Application for Automatic Extension of Time To File U.S. Individual Income Tax Return](#) by the due date for filing your calendar year return (usually April 15) or fiscal year return. For a Spanish version of this form, download [IRS Form 4868sp](#).

Special rules may apply if you are:

- Living outside the United States.
- Out of the country when your six-month extension expires.
- Living in a combat zone or a qualified hazardous area.

Get [filing information](#) about your tax return, including guidelines on extensions of time to file.

IRS Imposter Scams

You may get a call from someone pretending to be from the IRS who claims you owe taxes. This caller will typically demand immediate payment and threaten you with arrest or lawsuits for not paying. Individuals carrying out this fraud will also make the caller ID appear as if the IRS is calling. Learn the signs to watch out for and how to report IRS imposter scams.

Signs of an IRS Imposter Scam

The IRS will always contact you by mail before calling you about unpaid taxes and will never:

- Demand immediate payment
- Ask for a specific payment method, such as a prepaid debit card, gift card, or wire transfer
- Threaten you with arrest or deportation for not paying your taxes
- Request personal or financial information by email, texting, or any social media

Report an IRS Imposter Scam

Follow these steps if you get a call from someone claiming to be from the IRS asking for a payment and have not first been contacted by the IRS by mail:

- If you owe federal taxes or think you might owe taxes, hang up and [get helpful online tools from the IRS](#). You can also call the IRS about payment questions at 1-800-829-1040 or 1-800-829-4059 (TTY).
- If you don't owe taxes, report the scam to the Treasury Inspector General for Tax Administration (TIGTA) by calling 1-800-366-4484.
- You can also file a complaint with the Federal Trade Commission (FTC) or call 1-877-FTC-HELP (1-877-382-4357). Please add "IRS Telephone Scam" to your complaint description.
- Help keep others safe by reporting all unsolicited online messages claiming to be from the IRS (or related to their work) to phishing@irs.gov.
- Learn how to [protect yourself from and report other scams and fraud](#).

1099 Income Statements

Businesses and government agencies use Form 1099 to report various types of income other than wages, salaries, and tips to the Internal Revenue Service (IRS).

Every business or agency must:

- Complete a Form 1099 for each transaction.
- Retain a copy for its records.
- Send a copy to you and to the IRS. You should receive your copy by early February (or mid-to-late February for Form 1099-B).

You must include this income on your federal tax return.

Incorrect or Missing Form 1099

If you do not agree with the information contained in your Form 1099, contact the business or [agency](#) that issued it.

If you did not receive your Form 1099, contact the business or [agency](#) that should have issued it.

Contact the IRS

If you requested Form 1099 from a business or agency and did not receive it, [contact the IRS](#).

Federal Tax Filing Season

The Internal Revenue Service (IRS) began accepting and processing federal tax returns for tax year 2016 on January 23, 2017. You have until April 18, 2017 to file your tax return unless you [file for an extension](#).

Help and Resources

- To help you prepare and file your return, the IRS offers [free online tools](#) and [special programs for qualifying taxpayers](#).
- If you owe the IRS money, learn about your [payment options](#). If the IRS owes you money, you can choose to receive your [tax refund](#) by direct deposit, U.S. Series I Savings Bonds, or paper check.
- [File your federal tax return online](#) or find out the address for mailing your paper return.
- For more information, [contact the IRS](#).

Get Tax Forms and Publications

Federal Tax Forms

You can get free tax forms and publications you need directly from the Internal Revenue Service (IRS) by [downloading them from IRS.gov](#) or ordering by phone at 1-800-829-3676. You can also get them from locations in your community, such as [taxpayer assistance centers](#) and libraries.

Many forms and publications are available in multiple years and file formats, including Section 508 accessible PDFs and Braille or text formats.

State Tax Forms

Download your [state's tax forms and instructions](#) and instructions for free

Get Your W-2 Before Tax Time

The Wage and Tax Statement, commonly known as a [W-2](#) form, is an important document to have at tax time. This form shows the income you earned for the year and the taxes withheld from those earnings. If you have had several jobs over the year, you may have several W-2 forms to file your tax return. Employers must send you your W-2 by January 31 for the earnings from the previous calendar year of work.

If you were an employee and [haven't received your W-2](#) by January 31 or the information is incorrect, the Internal Revenue Service (IRS) offers some tips on what you can do. Employers that have questions about filing W-2 forms for your employees can check these [resources on where, when, and how to file](#) from the IRS.

For more information, contact the [Internal Revenue Service](#).

IRS Mailing Addresses

The Internal Revenue Service (IRS) provides mailing addresses for tax returns, non-return forms, applications, and payments. There are several mailing addresses; the correct one to use depends on the purpose of contact and the region of the country you are in:

- [Paper Tax Returns](#) (with or without a payment)
- Non-Return Forms (applications and payments)

You can also check a [form's corresponding instructions](#) for a mailing address.

Contact the IRS

For more information, [contact the IRS](#).

Taxpayer Identification Numbers (TINs)

A Taxpayer Identification Number (TIN) is an identification number that you need to include on returns, statements, and other tax-related documents.

There are many types of TINs for a variety of tax situations:

- Employer Identification Number (EIN) – This is also known as a federal tax identification number, and is used to identify a business.
 - Learn how to apply for an EIN.
 - If your business structure or ownership has changed, you may [need a new EIN](#).
 - Learn about business taxes, the forms you need to file, and more.
- Social Security Number (SSN) – You need this nine-digit number to get a job, receive Social Security benefits, and other government services.
 - Find out how to get a [new, replacement, or corrected card](#).
- Individual Taxpayer Identification Number (ITIN) – This tax processing number is only available for certain nonresident and resident aliens, their spouses, and dependents who cannot get a SSN.
 - To obtain an ITIN, you must complete [IRS Form W-7, IRS Application for Individual Taxpayer Identification Number](#).
Note: You must [renew your ITIN](#) if it has not been used on a federal income tax return in the last three years or if it was issued before 2013.
- Adoption Taxpayer Identification Number (ATIN) – A temporary nine-digit number issued by the IRS to individuals who are in the process of legally adopting a U.S. citizen or resident child, but who cannot get an SSN for that child in time to file their tax return.
 - To apply for an ATIN, you must complete [Form W-7A, Application for Taxpayer Identification Number for Pending U.S. Adoptions](#).
- Preparer Tax Identification Number (PTIN) – If you are a paid tax preparer you must use a valid Preparer Tax Identification Number (PTIN) on returns you prepare.
 - To get a PTIN, use the [IRS sign-up system](#).

The Social Security Administration (SSA) issues a SSN and the Internal Revenue Service (IRS) issues all other TINs.

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