Free Massachusetts Income Tax Return Filing Program for Full-year Residents

Overview

You can file your income tax return for free through MassTaxConnect if you:

- Were a Massachusetts (MA) full-year resident
- Previously filed a MA return and
- The schedules needed to complete your return are supported (see list below).

Your tax return must be e-filed through MassTaxConnect. A paper or printed version of the return will not be accepted. Follow the instructions below to save a copy of your completed return.

Getting Started

To file a personal income tax return through <u>MassTaxConnect:</u>

- 1. Choose **Sign Up** on the MassTaxConnect homepage
- 2. Select **Create My Logon**, if you haven't already created a logon, and follow the prompts
- 3. Select the option to sign up as an individual and the account type is personal income tax.

You will need to provide either a **Social Security number** or **ITIN**.

You'll also need to provide one of the following tax amounts from one of your last three tax returns (Form 1 or Form 1-NR/PY).

These tax amounts can be found on the lines that read:

- INCOME TAX AFTER CREDITS or
- THIS IS YOUR REFUND.

Note: a zero return amount cannot be used for authentication:

This program can be used by taxpayers who need only to file a state income tax return to receive a Circuit Breaker credit or Child and Family Tax Credit.

Before starting, review the <u>Form 1 Instructions</u> for personal income tax return for recent tax law changes, common errors, keywords and their definitions, and calculations for reporting amounts.

Schedules Supported by MassTaxConnect

These Form 1 schedules are supported by the MassTaxConnect income tax return filing program:

Available Schedules

The following schedules/forms are available using the MassTaxConnect application:

Schedule B Interest, Dividends and Certain Capital Gains and Losses

Schedule C Massachusetts Profit or Loss from Business

Schedule CB Circuit Breaker Credit

Schedule D Long-Term Capital Gains and Losses Excluding Collectibles and pre-1996 installment sales

Schedule DI Dependent Information

Schedule E
 Reconciliation Total Supplemental Income and (Loss)
 Schedule E-1
 Rental Real Estate and Royalty Income and (Loss)
 Schedule E-2
 Partnership and S Corporation Income and (Loss)
 Schedule E-3
 Estate, Trust, REMIC and Farm Income and (Loss)

Schedule HC Health Care Information

Schedule OJC Income Tax Due to Other Jurisdictions

Schedule X Other Income
 Schedule Y Other Deductions

Schedule 4% Surtax 4% Surtax

Form M-2210 Underpayment of Massachusetts Estimated Income Tax

Prepare to File Your Return

To file your return, you will need the following information:

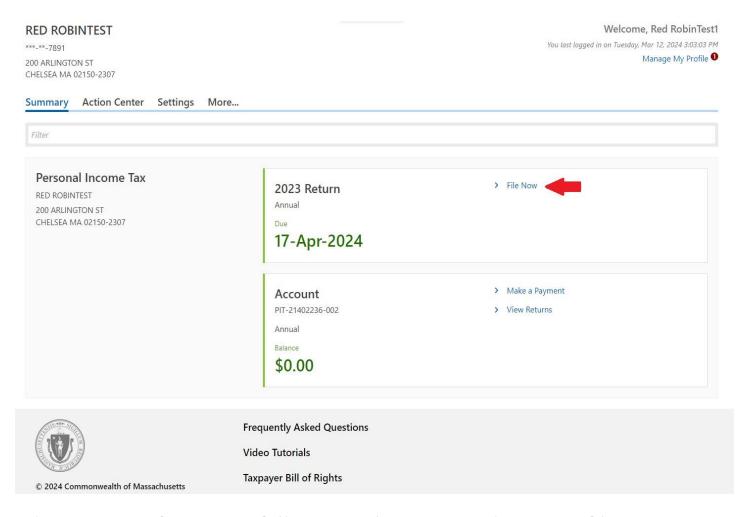
- Social Security number
- Filing status
- Federal income
- Exemptions
- Income and deductions
- State withholding information from all Forms W-2 and 1099 If applicable, your completed US Form 1040/1040EZ.

File Your Return

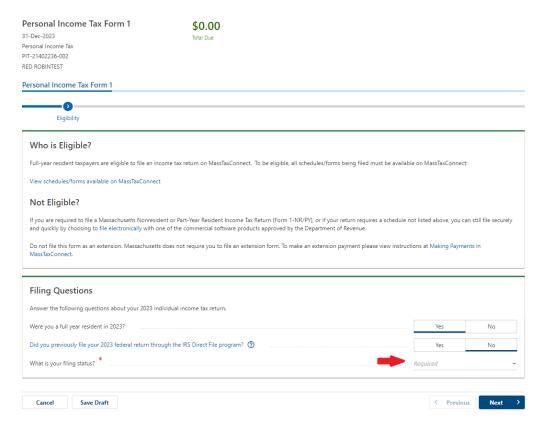
The format is divided into sections. You must complete all the required fields before moving to the next section. The **Save Draft** option at the end of each section allows you to save your draft and return to it later.

After signing up, you will see your Personal Income Tax panel.

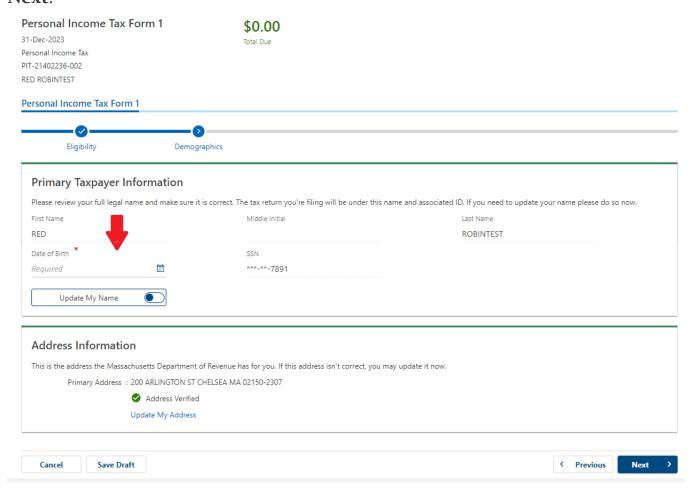
Choose **File Now** to file your return.



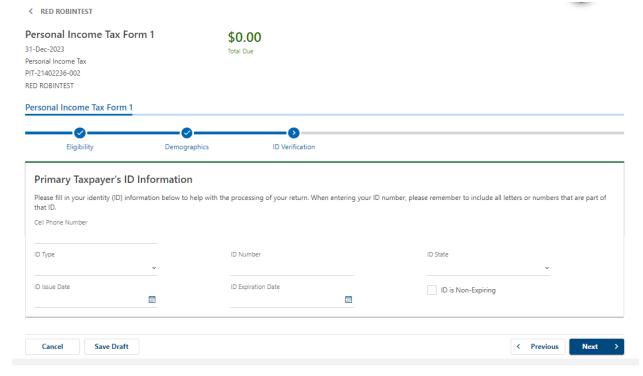
Select Yes or No if you were a **full year resident** in 2023. Choose your **filing status** at bottom (e.g., single, head of household, joint). Choose **Next**.



If you need to update your name, select **Update My Name**. Enter your Date of Birth. You may update your address by choosing **Update My Address**. When you are done reviewing your name and address on the **Demographics** panel, choose **Next**.



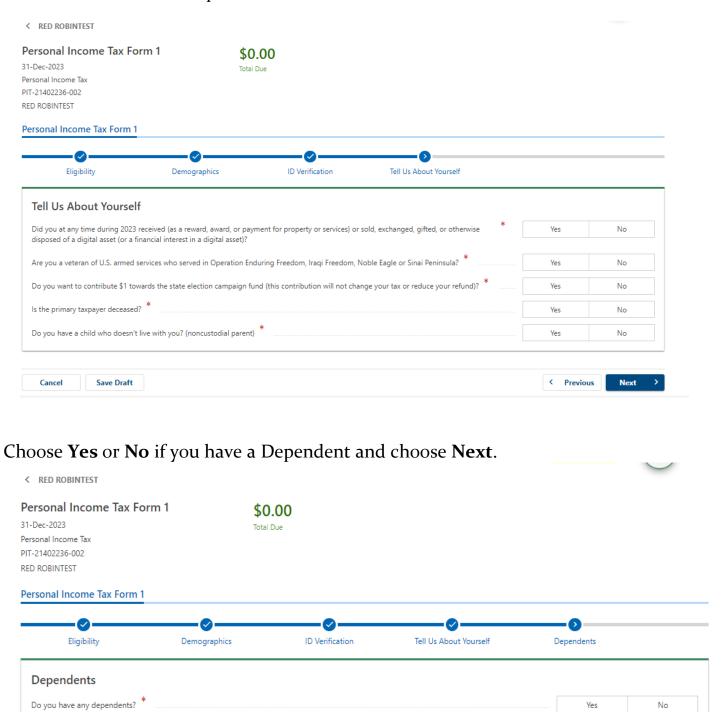
Enter your identity (ID) information on the ID Verification panel and choose Next.



Answer **Yes** or **No** to all questions and choose **Next**.

Cancel

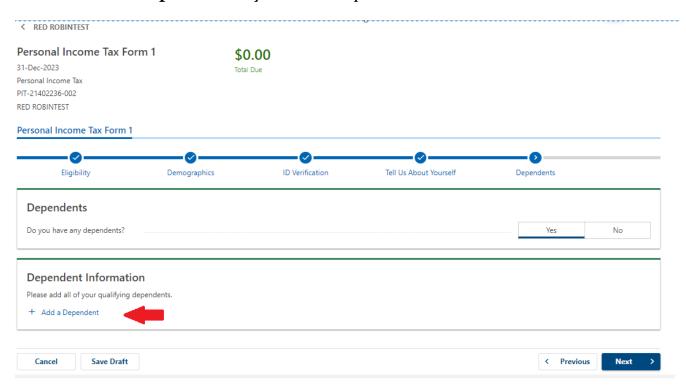
Save Draft



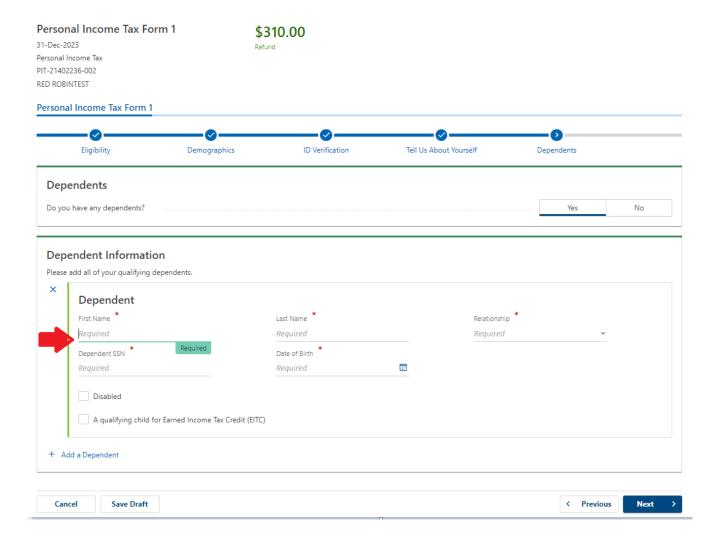
No

< Previous

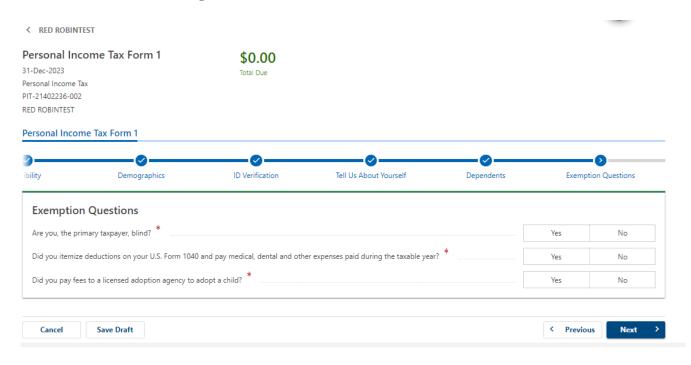
Choose Add a Dependent if you have Dependents.



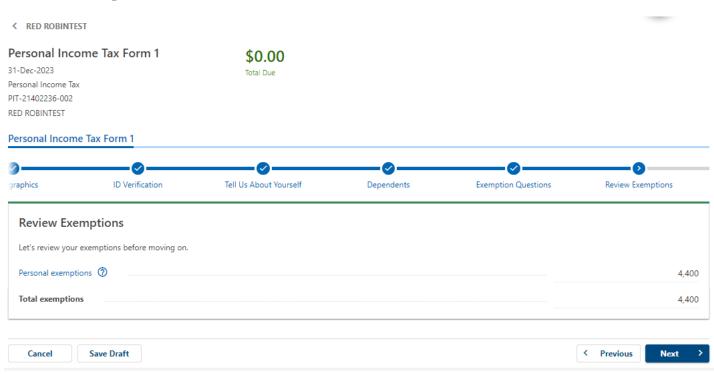
Enter all requested information for the Dependent. If you have more than one dependent, choose **Add a Dependent**. When all are added, choose **Next**.



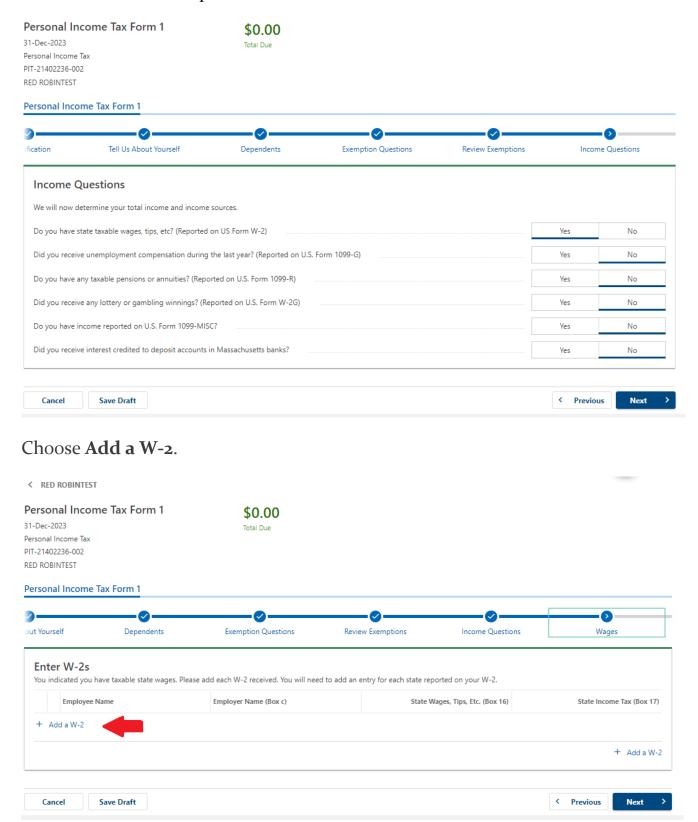
Answer all Yes or No questions and choose Next.



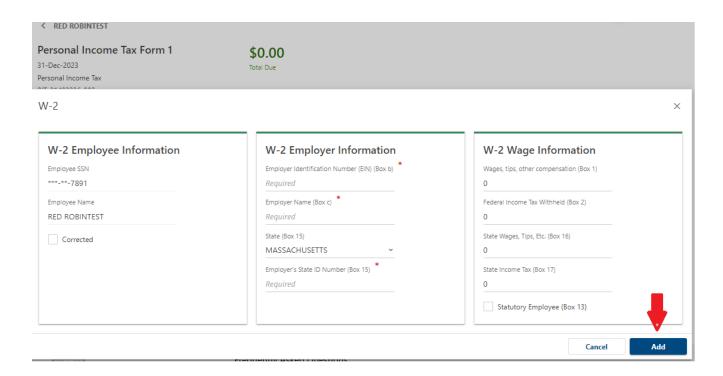
Review Exemptions and choose Next.



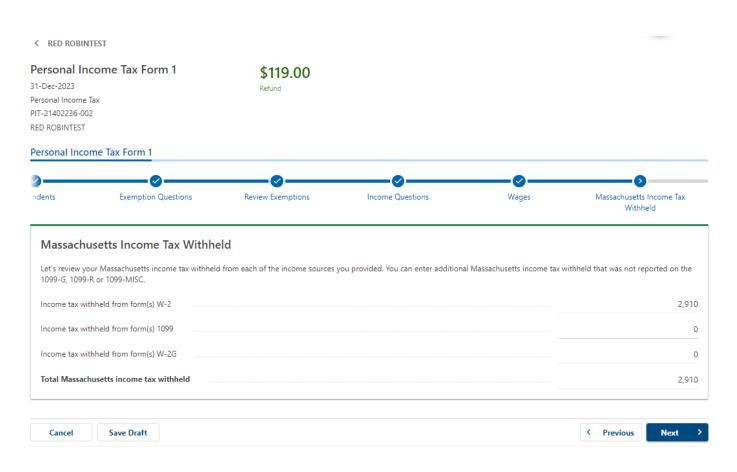
Answer all Yes or No questions and choose Next.



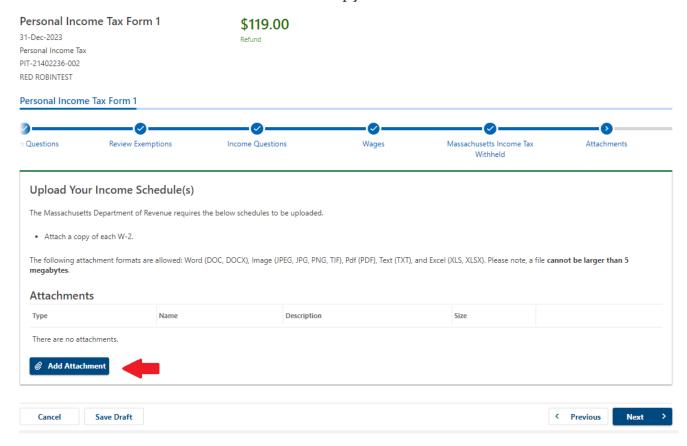
Enter all requested information and choose **Add**. If you have more than one W-2 employee, repeat the process for each and choose **Next**.



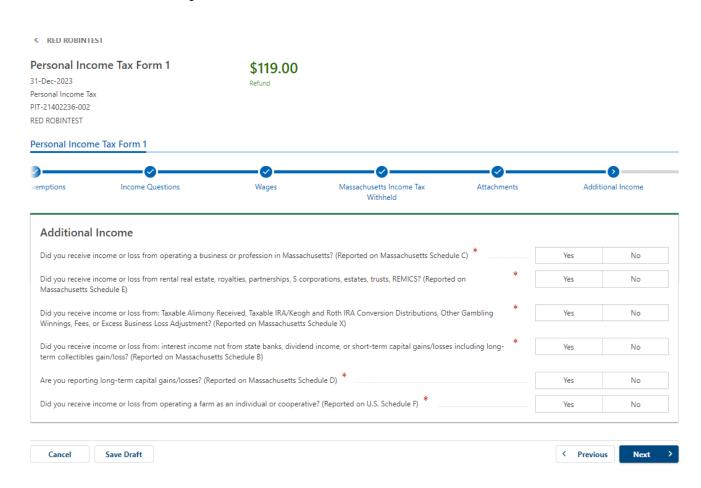
Review your Massachusetts Income Tax Withheld information and choose Next.



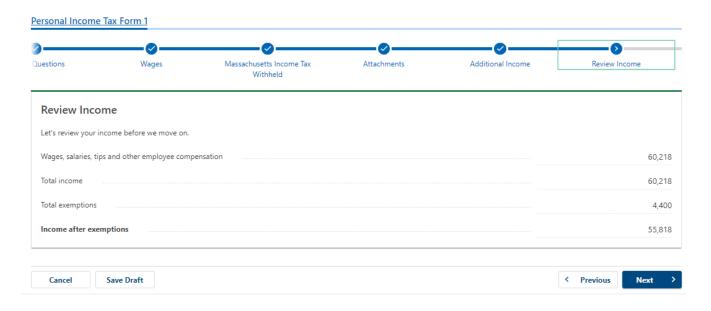
Choose Add Attachment to attach a copy of each W-2 and choose Next.



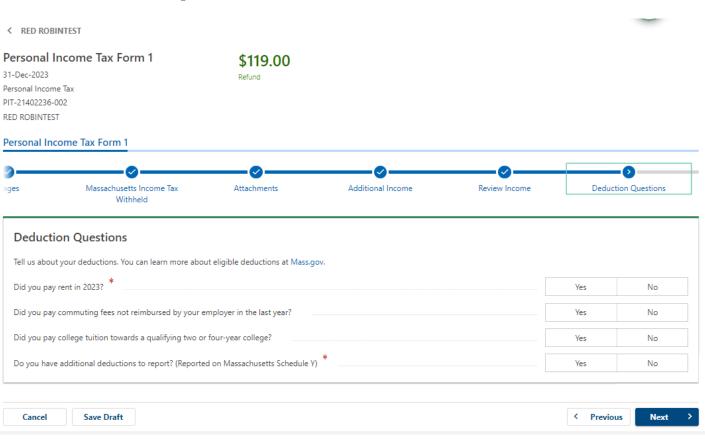
Answer all Yes or No questions and choose Next.



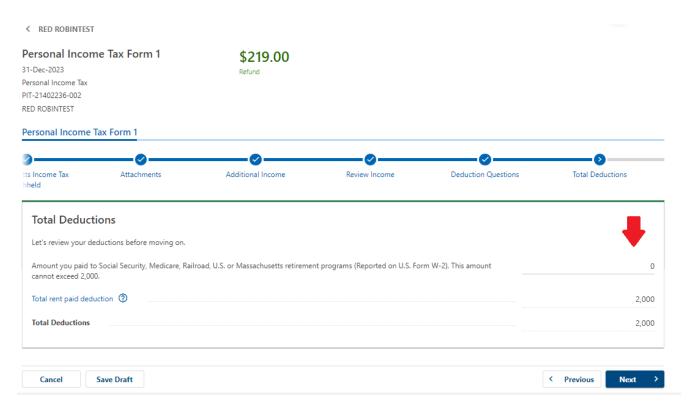
Confirm the information in the **Review Income** panel and choose **Next.**



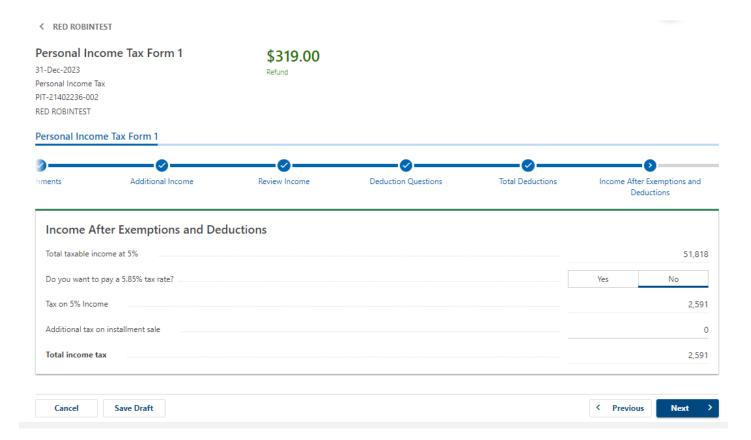
Answer all Yes or No questions and choose Next.



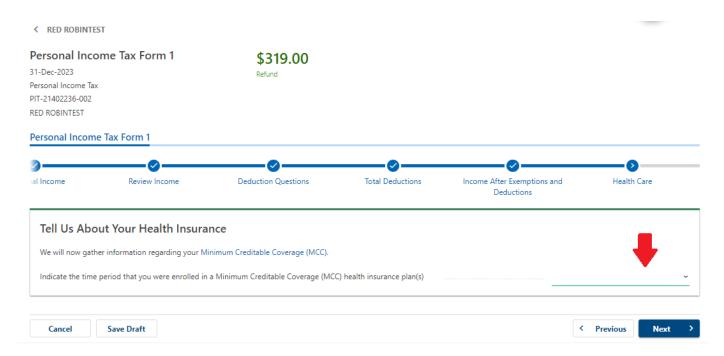
Enter amount you paid to Social Security, Medicare, Railroad, U.S., or Massachusetts retirement programs (Reported on U.S. Form W-2). Review **Total** Deductions and choose **Next**.



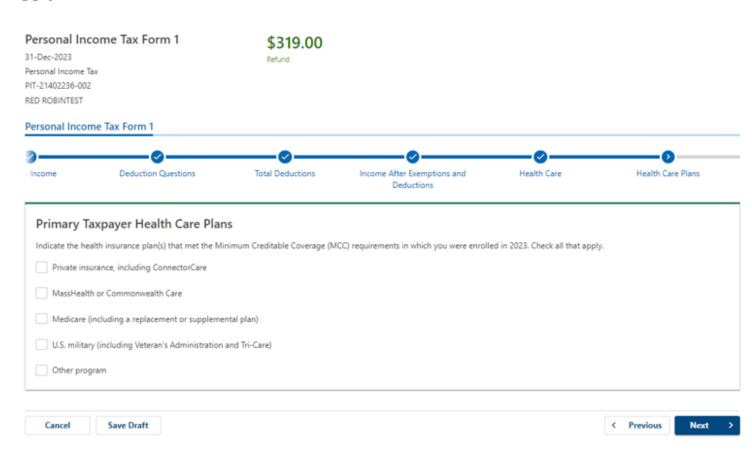
Confirm the **Total income tax** and choose **Next**.



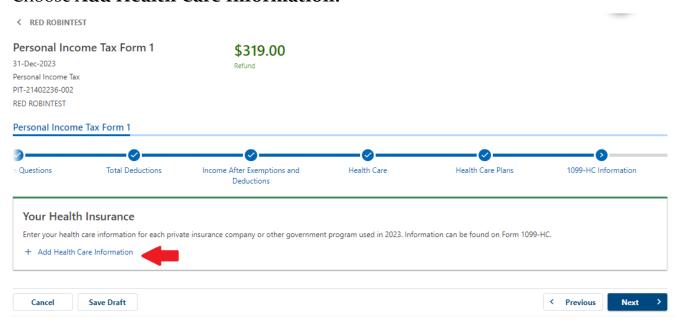
Indicate the time period that you were enrolled in a **Minimum Creditable Coverage (MCC)** health insurance plan and choose **Next**.

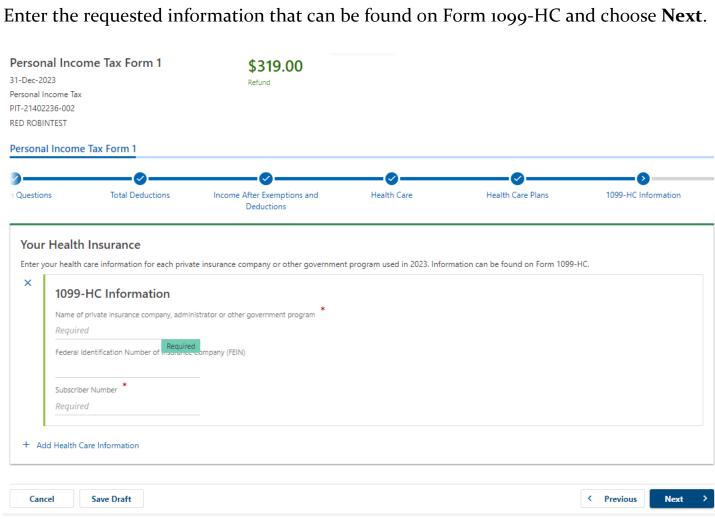


Choose the Health Care Plan(s) that you were enrolled in for 2023. Check all that apply and choose **Next**.

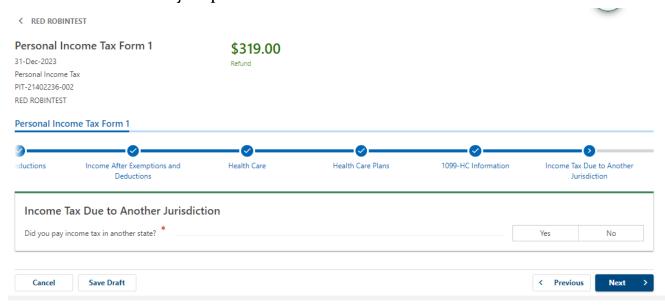


Choose Add Health Care Information.

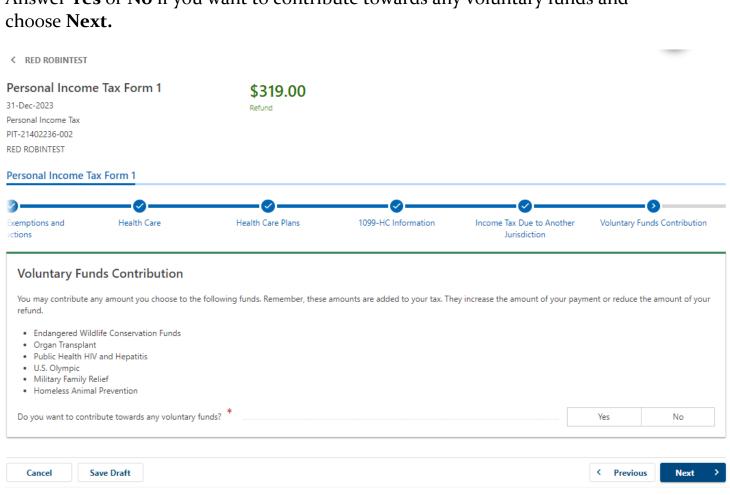




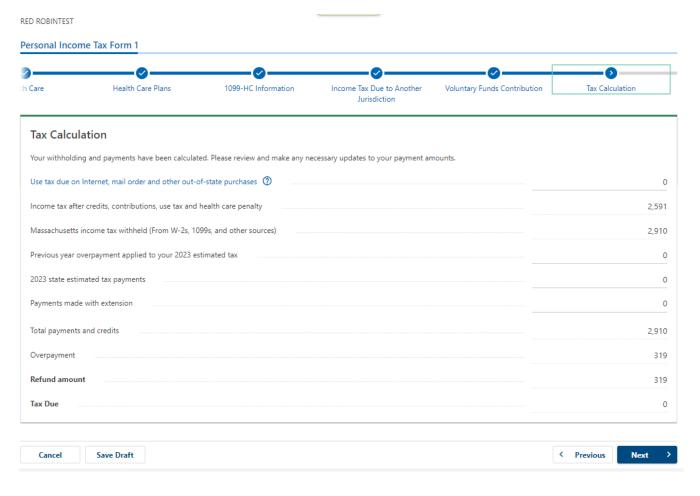
Answer **Yes** or **No** if you paid income tax in another state and choose **Next**.



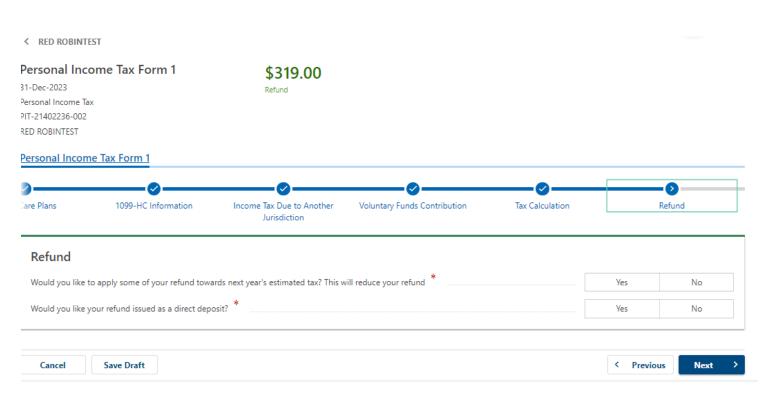
Answer Yes or No if you want to contribute towards any voluntary funds and



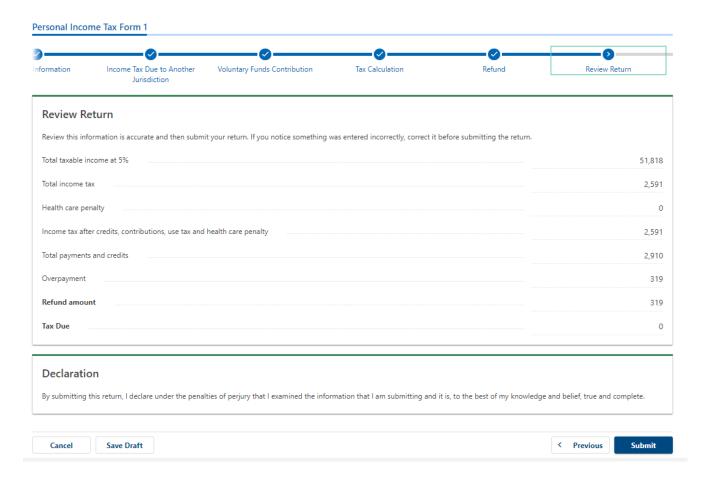
Review the withholding and payments in the **Tax Calculation** panel and choose **Next**.



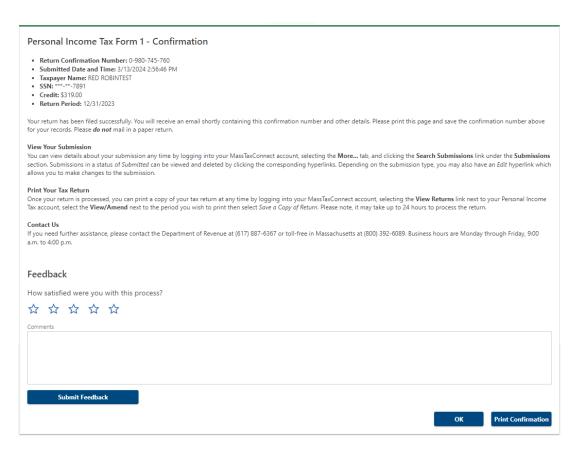
Answer Yes or No to both questions and choose Next.



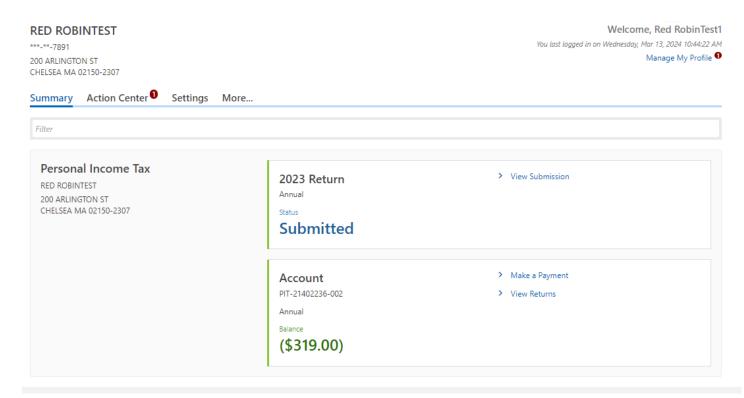
Confirm the information in the **Review Return** panel and choose **Submit**.



Provide any feedback and choose **OK** or **Print Confirmation**.



To check on the status of your return, choose the **Summary** tab.



You also will receive an automatic email notification that your return was submitted.

This is an automated email and is unable to receive replies.

Your submission information is below. Please note that your submission may take several days to complete.

Confirmation Summary

Submission: Personal Income Tax Form 1
 Confirmation Number: 0-887-832-864

Submission Date and Time: 1/29/2024 4:31:22 PM

Legal Name: RED ROBINTEST1
Account ID: PIT-21405929-002
Filing Period: 31-Dec-2023

You can view details about your submission at any time by logging in to your <u>MassTaxConnect</u> account, selecting the **More**...tab and then the **Search Submissions** hyperlink.