

Completing your state tax return using Direct File.

Once you've completed your federal tax return using Direct File from the IRS, you will be directed to MassTaxConnect to complete your Massachusetts state tax return.

If you have logon credentials for MassTaxConnect, Select **Log in**. If not, choose Sign Up to create a logon.

The screenshot shows the MassTaxConnect website interface. At the top left, the logo for MassTaxConnect is visible. Below the logo, there is a navigation bar with a home icon and the text '< Home'. A prominent orange box contains an 'Important Notice' regarding the Direct File program. Below this, a white box provides information about 'What is Direct File?' and 'Who is eligible?'. The 'Who is eligible?' section lists several criteria: full-year MA residents who did not report income or pay to any other state; taxpayers who have completed a U.S. Federal tax return for the current year through Direct File on IRS.gov; taxpayers with a MassTaxConnect logon; and taxpayers who are using the same filing status on their IRS and state returns. Below this, there is a section for 'Not eligible?' which states that users can still file their return using MassTaxConnect but cannot import their return information. At the bottom of the page, there are two main buttons: 'Log In' and 'Sign Up'. The 'Log In' button is highlighted with a red arrow, and the 'Sign Up' button is also highlighted with a red arrow. Below these buttons, there are links for 'Frequently Asked Questions', 'Video Tutorials', and 'Taxpayer Bill of Rights'. The Massachusetts state seal is visible in the bottom left corner.

MassTaxConnect

< Home

Important Notice
Direct File is currently only being offered to **select individuals** that meet all the eligibility requirements and have already filed a Direct File return on IRS.gov. If you are not eligible to use Direct File at this time, you may still be able to file your state return at MassTaxConnect. Log in to review your filing options.

What is Direct File?
Direct File allows you to import your federal tax return information directly from IRS.gov to give you a head start on your state taxes. It is only for taxpayers who have already filed their federal return through the Direct File program on IRS.gov. MassTaxConnect provides free electronic filing of your state tax return with the Department of Revenue. Filing electronically is secure, and choosing direct deposit is the fastest way to get your refund.

Who is eligible?

- Full-year MA residents who did not report income or pay to any other state.
- Taxpayers who have completed a U.S. Federal tax return for the current year through Direct File on IRS.gov.
- Taxpayers with a MassTaxConnect logon; and
- Taxpayers who are using the same filing status on their IRS and state returns.

If you filed a Massachusetts return in the past three years, but do not have a MassTaxConnect logon, you can create one using the Sign Up link below.

Not eligible?
Even if you are not eligible for Direct File, you can file your return using MassTaxConnect. However, you will not be able to import your return information. Log in to review your filing options.

Log In
Use this option if you have an existing MassTaxConnect logon or you just created one. You will be able to file your return once you have logged in.
> Log In

Sign Up
Use this option to sign-up for MassTaxConnect. After creating an account, you will be re-directed to this page to login. You will then be able to file your return.
> Sign Up

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After you log in, you will be directed to your 2023 Personal Income Tax Form 1 to start filing your return. The answers have pre-filled as Yes since you filed with Direct File. Select **Next** to move forward and import your federal tax return data.

Personal Income Tax Form 1

31-Dec-2023
Personal Income Tax
PIT-21426799-002
SNOW STORM

\$0.00

Total Due

Personal Income Tax Form 1

Eligibility

Who is Eligible?

Full-year resident taxpayers are eligible to file an income tax return on MassTaxConnect. To be eligible, all schedules/forms being filed must be available on MassTaxConnect:

[View schedules/forms available on MassTaxConnect](#)

Not Eligible?

If you are required to file a Massachusetts Nonresident or Part-Year Resident Income Tax Return (Form 1-NR/PY), or if your return requires a schedule not listed above, you can still file securely and quickly by choosing to [file electronically](#) with one of the commercial software products approved by the Department of Revenue.

Do not file this form as an extension. Massachusetts does not require you to file an extension form. To make an extension payment please view instructions at [Making Payments in MassTaxConnect](#).

Filing Questions

Answer the following questions about your 2023 individual income tax return.

Were you a full year resident in 2023?

Yes

No

Did you previously file your 2023 federal return through the IRS Direct File program? [?](#)

Yes

No

Cancel

Save Draft

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Select **Import Federal Tax Return Information** to import the information you entered on your federal tax return. Note: If the taxpayer clicks on the 'Import Federal Tax Return Information', they will not have to Select **Next**. The screen will automatically go to the ID.me login screen (not shown in the testing environment).

MassTaxConnect

< SNOW STORM

Personal Income Tax Form 1

31-Dec-2023
Personal Income Tax
PIT-21426799-002
SNOW STORM

\$0.00

Total Due

Personal Income Tax Form 1

Eligibility

Import Federal Tax Return Information

Import Federal Tax Return Information

You can use your 2023 federal tax return information from IRS Direct File to pre-fill portions of your state tax return. You'll be asked to sign in using ID.me, which helps the IRS stop tax fraud and keep your information safe.

Import Federal Tax Return Information

If you wish to file your state return without importing your federal return information, you can do so below. Continuing without importing is only recommended if you are not eligible for the Direct File program.

Continue Without Importing

Cancel

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You will then be redirected to the IRS website to choose “**Transfer my 2023 federal return to MassTaxConnect**” to import the data to your state return. If your federal return indicates “Submitted” status instead of “Accepted” status you will be given a warning that you may have to amend your MA return if you import the data before it is accepted. You will receive emails from IRS Direct File when your federal return has been submitted and then accepted. If your IRS return status is rejected, you will need to correct errors on your federal return before you can import the federal data to your state return in MassTaxConnect. We recommend waiting until your federal return is accepted by the IRS before completing your MA return to minimize the chance of having to file an amended return.



Your 2023 federal tax return is ready to transfer to Massachusetts's MassTaxConnect.

 Federal tax return status: **Accepted**

By clicking this button, I agree to transfer my federal tax return data to Massachusetts's MassTaxConnect, which will be used to pre-fill portions of my state tax return.

[What data will I transfer?](#)

**Transfer my 2023 federal tax return to
MassTaxConnect** 

[Cancel and return to MassTaxConnect](#) 



After choosing “**Transfer my 2023 federal return to MassTaxConnect**” your federal data will be transferred to your 2023 Massachusetts state tax return. Confirm that your information is correct and select **Next**.

MassTax CONNECT MassTaxConnect

< WINFRED JONES

Personal Income Tax Form 1 \$3,289.00
Refund

31-Dec-2023
Personal Income Tax
PIT-21466365-002
WINFRED JONES

Personal Income Tax Form 1

Eligibility Import Federal Tax Return Information

Import Federal Return Information

✓ You have successfully imported your federal return information from IRS.gov for the following individual(s) and tax year.

Primary Name : WINFRED JONES
Primary SSN : ***-**-5488
Filing Period : 31-Dec-2023
Filing Status : Head of Household

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Enter your **date of birth** and update your **name** if needed. Verify your address. Select **Next** to continue.

MassTax CONNECT MassTaxConnect

< WINFRED JONES

Personal Income Tax Form 1 \$3,289.00
Refund

31-Dec-2023
Personal Income Tax
PIT-21466365-002
WINFRED JONES

Personal Income Tax Form 1

Eligibility Import Federal Tax Return Information Demographics

Primary Taxpayer Information

Please review your full legal name and make sure it is correct. The tax return you're filing will be under this name and associated ID. If you need to update your name please do so now.

First Name Middle Initial Last Name
WINFRED
Date of Birth * SSN
***-**-5488

Update My Name

Address Information

This is the address the Massachusetts Department of Revenue has for you. If this address isn't correct, you may update it now.

Primary Address : 200 Arlington Street CHELSEA MA 02150
Address needs to be verified

Update My Address

Check that your spouse's name and social security number have been imported. Enter their **date of birth**. Select Update My Spouse's **Name** if needed. Select **Next** to continue.

MassTaxCONNECT MassTaxConnect

< JOHN BRADY

Personal Income Tax Form 1 \$0.00
Total Due

31-Dec-2023
Personal Income Tax
PIT-21441890-002
JOHN BRADY

Personal Income Tax Form 1

Eligibility Import Federal Tax Return Information Filing Status Primary's Demographics **Spouse's Demographics**

Spouse Information
Please enter your spouse's full name, ID and date of birth.

First Name * <i>Required</i>	Middle Initial	Last Name * <i>Required</i>
ID Type * <i>Required</i>	ID * <i>Required</i>	Date of Birth * <i>Required</i>

Update My Spouse's Name

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Review your and your spouse's **ID information**. Select **Next** to continue.

MassTaxCONNECT MassTaxConnect

< JOHN BRADY

Personal Income Tax Form 1 \$0.00
Total Due

31-Dec-2023
Personal Income Tax
PIT-21441890-002
JOHN BRADY

Personal Income Tax Form 1

Eligibility Import Federal Tax Return Information Filing Status Primary's Demographics **Spouse's Demographics**

Spouse Information
Please enter your spouse's full name, ID and date of birth.

First Name AMY	Middle Initial	Last Name BRADY
ID Type Social Security #	SSN ***-**-4587	Date of Birth 11-May-1955

Update My Spouse's Name

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Enter additional information to help with processing of your return. This is optional. Select **Next**.

Primary Taxpayer's ID Information

Please fill in your identity (ID) information below to help with the processing of your return. When entering your ID number, please remember to include all letters or numbers that are part of that ID.

Cell Phone Number

ID Type ID Number ID State

ID Issue Date ID Expiration Date ID is Non-Expiring

Spouse's ID Information

Please fill in your spouse's identity (ID) information to help with the processing of your return. When entering their ID number, please remember to include all letters or numbers that are part of that ID.

Cell Phone Number

ID Type ID Number ID State

ID Issue Date ID Expiration Date ID is Non-Expiring



The digital assets question is already preselected as **No**. Answer the remaining questions and select **Next** to continue.

Personal Income Tax Form 1

Ability Federal Return Primary's Demographics Spouse's Demographics ID Verification **Tell Us About Yourself**

Tell Us About Yourself

Did you at any time during 2023 received (as a reward, award, or payment for property or services) or sold, exchanged, gifted, or otherwise disposed of a digital asset (or a financial interest in a digital asset)? Yes No

Are you a veteran of U.S. armed services who served in Operation Enduring Freedom, Iraqi Freedom, Noble Eagle or Sinai Peninsula? * Yes No

Is your spouse a veteran of U.S. armed services who served in Operation Enduring Freedom, Iraqi Freedom, Noble Eagle or Sinai Peninsula? * Yes No

Do you want to contribute \$1 towards the state election campaign fund (this contribution will not change your tax or reduce your refund)? * Yes No

Does your spouse want to contribute \$1 towards the state election campaign fund? * Yes No

Is the primary taxpayer deceased? * Yes No

Is your spouse deceased? * Yes No

Do you have a child who doesn't live with you? (noncustodial parent) * Yes No



Dependents names, SSNs, and whether they qualify for EITC is imported from Direct File. You must enter dependents relationship, date of birth, and indicate if dependent(s) are disabled. Select **Next**.

Personal Income Tax Form 1
31-Dec-2023
Personal Income Tax
PIT-21466365-002
WINFRED JONES

\$3,289.00
Refund

Personal Income Tax Form 1

Eligibility Import Federal Tax Return Information Demographics ID Verification Tell Us About Yourself **Dependents**

Dependent Information
Please review or add the date of birth and disability status for each of your dependents.

Dependent :

First Name LINCLON	Last Name COLLINS	Relationship *
Dependent SSN ***-**-5654	Date of Birth *	
<input type="checkbox"/> Disabled		
<input checked="" type="checkbox"/> A qualifying child for Earned Income Tax Credit (EITC)		

Dependent :

First Name KEISHA	Last Name COLLINS	Relationship *
Dependent SSN ***-**-7949	Date of Birth *	
<input type="checkbox"/> Disabled		

Cancel Save Draft < Previous **Next** >

Once all required dependent information is entered, Select **Next** to continue.

Dependent Information
Please review or add the date of birth and disability status for each of your dependents.

Dependent :

First Name BLIZZARD	Last Name STORM	Relationship BIOLOGICAL CHILD
Dependent SSN ***-**-3414	Date of Birth 01-Feb-2003	
<input type="checkbox"/> Disabled		
<input checked="" type="checkbox"/> A qualifying child for Earned Income Tax Credit (EITC)		

Dependent :

First Name NOREASTER	Last Name STORM	Relationship BIOLOGICAL CHILD
Dependent SSN ***-**-1641	Date of Birth 14-Feb-2006	
<input type="checkbox"/> Disabled		
<input type="checkbox"/> A qualifying child for Earned Income Tax Credit (EITC)		

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Review the Exemptions screen. Select **Next** to continue.

Personal Income Tax
PIT-21400649-002
SNOW STORM

Personal Income Tax Form 1



Review Exemptions

Let's review your exemptions before moving on.

Personal exemptions ⓘ	8,800
Number of dependents	4
Dependent exemption amount	4,000
Total exemptions	12,800

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Frequently Asked Questions

W-2 information entered on the Federal return will import here. You may select each W-2 to review. When review is complete, select **Next** to continue.

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< KENNY COMMUTER

Personal Income Tax Form 1

31-Dec-2023
Personal Income Tax
PIT-21462446-002
KENNY COMMUTER

\$315.00
Refund

Personal Income Tax Form 1



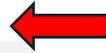
Review Your W-2s

Your federal return indicates your received taxable state wages. Please review each W-2 received and confirm your State Wages, Tips (box 16) and State Income (box 17) are correct.

Employee Name	Employer Name (Box c)	State Wages, Tips, Etc. (Box 16)	State Income Tax (Box 17)
KENNY COMMUTER	STATE STREET	40,575	2,029
SALLY COMMUTER	WAGE INC	40,575	2,029

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You may make changes to State Wages (Box 16) and State Withholding (Box 17) only on the imported W-2(s). The W-2 may not be deleted. Select Ok and then select **Next** to continue.

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< KENNY COMMUTER

Personal Income Tax Form 1 **\$315.00**
31-Dec-2023 Refund
Personal Income Tax
PIT-21462448-002
KENNY COMMUTER

Personal Income Tax Form 1

W-2

W-2 Employee Information	W-2 Employer Information	W-2 Wage Information
Is this for your Spouse? <input checked="" type="radio"/> Yes <input type="radio"/> No	Employer Identification Number (EIN) (Box b) 00-9852215	Wages, tips, other compensation (Box 1) 40,575
Employee SSN ***-**-5459	Employer Name (Box c) WAGE INC	Federal Income Tax Withheld (Box 2) 4,058
Employee Name SALLY COMMUTER	State (Box 15) MASSACHUSETTS	State Wages, Tips, Etc. (Box 16) 40,575
<input type="checkbox"/> Corrected	Employer's State ID Number (Box 15) 009852215	State Income Tax (Box 17) 2,029
		<input type="checkbox"/> Statutory Employee (Box 13)

Cancel OK

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The Unemployment compensation amount entered on the Federal Direct File return will populate on the top line "Unemployment Compensation". You can add 1099-G(s) to the 1099-G table by selecting the **+ Add a 1099-G** link. The amount you add must equal the amount you reported on the Direct File return before you can continue. Select **Next**.

MassTaxCONNECT MassTaxConnect

< ADAM WASHINGTON

Personal Income Tax Form 1 **\$120.00**
Refund

31-Dec-2023
Personal Income Tax
PIT-21392469-002
ADAM WASHINGTON

Personal Income Tax Form 1

Identification Tell Us About Yourself Adoption Exemption Review Exemptions Wages Unemployment Compensation

Unemployment Compensation

Our records indicate you received unemployment compensation. Add each 1099-G received for the current tax year.

Unemployment compensation 3,000

Amount of unemployment compensation from 1099-G table 0

Enter 1099-Gs

You indicated you have received unemployment compensation. Please add each 1099-G received.

Recipient's Name	Payer's Name	Unemployment Compensation (Box 1)	State Tax Withheld (Box 11)
+ Add a 1099-G			

[Cancel](#) [Save Draft](#) [Previous](#) [Next](#)

Enter information on the 1099G and select **Add**. Select **Next**.

MassTaxCONNECT MassTaxConnect

< KENNY COMMUTER

Personal Income Tax Form 1 **\$315.00**
Refund

31-Dec-2023
Personal Income Tax
PIT-21462448-002
KENNY COMMUTER

1099-G

1099-G Recipient's Information

It is for your Spouse? Yes No

Recipient SSN ***-**-5658

Recipient's Name KENNY COMMUTER

Corrected

1099-G Payer's Information

Payer FEIN

Payer's Name

State (Box 10a) MASSACHUSETTS

State ID Number (Box 10b)

1099-G Distribution Information

Unemployment Compensation (Box 1) 0

State or local income tax refunds, credits, or offsets (Box 2) 0

Box 2 amount is for tax year (Box 3) 0

Federal Income Tax Withheld (Box 4) 0

State Tax Withheld (Box 11) 0

[Cancel](#) [Add](#)

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The 1099-G (s) that were added will now be reflected on the second line “Amount of unemployment compensation from 1099-G table”. Your amounts must match what you filed in Direct File before moving on. Select **Add**.

PIT-21400649-002
SNOW STORM

1099-G

1099-G Recipient's Information

Is this for your Spouse?

Yes No

Recipient SSN
***-**-6534

Recipient's Name
WINTER STORM

Corrected

1099-G Payer's Information

Payer FEIN
00-1234567

Payer's Name
COMMONWEALTH OF MA

State (Box 10a)
MASSACHUSETTS

State ID Number (Box 10b)
001234567

1099-G Distribution Information

Unemployment Compensation (Box 1)
10,000

State or local income tax refunds, credits, or offsets (Box 2)
0

Box 2 amount is for tax year (Box 3)
2023

Federal Income Tax Withheld (Box 4)
1,000

State Tax Withheld (Box 11)
500

Cancel Add

+ Add a 1099-G

Review 1099-G information imported from Direct File and add additional 1099-Gs if any. Select **Next** to continue.

MassTax CONNECT MassTaxConnect

< KENNY COMMUTER

Personal Income Tax Form 1 **\$540.00**
31-Dec-2023
Personal Income Tax
PIT-21462448-002
KENNY COMMUTER
Refund

Personal Income Tax Form 1

Demographics ID Verification Tell Us About Yourself Review Exemptions Wages Unemployment Compensation

Unemployment Compensation

Our records indicate you received unemployment compensation. Add each 1099-G received for the current tax year.

Unemployment compensation 4,500

Amount of unemployment compensation from 1099-G table 4,500

Enter 1099-Gs

You indicated you have received unemployment compensation. Please add each 1099-G received.

Recipient's Name	Payer's Name	Unemployment Compensation (Box 1)	State Tax Withheld (Box 11)
KENNY COMMUTER	COMM OF MASS	4,500	225

+ Add a 1099-G

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Withholding amounts will reflect W-2 and 1099-G information imported from Direct File. Select **Next** to continue.

Personal Income Tax
PIT-21400649-002
SNOW STORM

Personal Income Tax Form 1



Massachusetts Income Tax Withheld

Let's review your Massachusetts income tax withheld from each of the income sources you provided. You can enter additional Massachusetts income tax withheld that was not reported on the 1099-G, 1099-R or 1099-MISC.

Income tax withheld from form(s) W-2	5,250
Income tax withheld from form(s) 1099	500
Income tax withheld from form(s) W-2G	0
Total Massachusetts income tax withheld	5,750

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Attach your 1099s. If you have unemployment income, you will be required to attach a 1099G here. Select **Next**.

Personal Income Tax
PIT-21400649-002
SNOW STORM

Personal Income Tax Form 1



Upload Your Income Schedule(s)

The Massachusetts Department of Revenue requires the below schedules to be uploaded.

The following attachment formats are allowed: Word (DOC, DOCX), Image (JPEG, JPG, PNG, TIF), Pdf (PDF), Text (TXT), and Excel (XLS, XLSX). Please note, a file **cannot be larger than 5 megabytes**.

Attachments

Type	Name	Description	Size	
1099-G	Testing 1099G.docx	1099G	11.72 KB	Remove
W-2	Testing W2 X2.pdf	W2 #2	33.20 KB	Remove
W-2	Testing W2.pdf	W2 #1	33.20 KB	Remove

[Add Attachment](#)

[Cancel](#) [Save Draft](#)

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Select **Yes** or **No** to the MA bank interest question. Select **Next**.

Personal Income Tax Form 1

Exemptions Wages Unemployment Compensation Massachusetts Income Tax Withheld Attachments **Massachusetts Interest Income**

Massachusetts Interest Income

Did you receive interest credited to deposit accounts in Massachusetts banks? *

Yes No

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If **yes**, enter your MA bank interest amount, and the MA bank exemption calculates automatically depending on your filing Status. Your total amount of Interest income reported on your federal return will be indicated on the Massachusetts Bank interest received line. Select **Next**.

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< KENNY COMMUTER

Personal Income Tax Form 1 **\$525.00**
31-Dec-2023 Refund
Personal Income Tax
PIT-21462448-002
KENNY COMMUTER

Personal Income Tax Form 1

Exemptions Wages Unemployment Compensation Massachusetts Income Tax Withheld Attachments **Massachusetts Interest Income**

Massachusetts Interest Income

Did you receive interest credited to deposit accounts in Massachusetts banks? Yes No

Massachusetts bank interest received. This amount cannot exceed the total interest of \$500 reported on Direct File. 500

Massachusetts bank interest exemption amount 200

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If you reported Interest Income on your federal return, Schedule B is automatically selected as **Yes** and cannot be changed. Make additional selections and select **Next**.

Personal Income Tax Form 1

31-Dec-2023
Personal Income Tax
PIT-21392794-002
SNOW STORM

\$1,235.00
Refund

Personal Income Tax Form 1



Additional Income

Did you receive income or loss from operating a business or profession in Massachusetts? (Reported on Massachusetts Schedule C) * Yes No

Did you receive income or loss from: Taxable Alimony Received, Taxable IRA/Keogh and Roth IRA Conversion Distributions, Other Gambling Winnings, Fees, or Excess Business Loss Adjustment? (Reported on Massachusetts Schedule X) * Yes No

Did you receive income or loss from: interest income not from state banks, dividend income, or short-term capital gains/losses including long-term collectibles gain/loss? (Reported on Massachusetts Schedule B) Yes No

Are you reporting long-term capital gains/losses? (Reported on Massachusetts Schedule D) * Yes No

Cancel Save Draft

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Total interest income reported on your federal return will be imported to Schedule B. The amount of MA bank interest that was reported on the previous screen will populate on line 5. Select **Next** to continue.

Personal Income Tax Form 1

31-Dec-2023
Personal Income Tax
PIT-21426799-002
SNOW STORM

\$1,235.00
Refund

Personal Income Tax Form 1



Schedule B Part 1 Interest and Dividend Income

1. Total interest income	1,500
2. Total ordinary dividends	0
3. Other interest and dividends not included above	0
4. Total interest and dividends. Add lines 1, 2 and 3	1,500
5. Total interest from Massachusetts banks	500
6. a. Other interest and dividends to be excluded	0
b. Part-Year/Nonresidents only	0
7. Subtotal: Line 4 minus lines 5, 6a and 6b.	1,000
8. Allowable deductions from your trade or business (from Schedule C-2)	0
9. Subtotal: Subtract line 8 from line 7	1,000

Cancel Save Draft

Next >

Schedule B is automatically selected **only** if you indicated you had Interest Income on your Direct File return. Total interest income imports from Direct File to line 1, and MA bank interest income populates from what you entered on the previous screen. If you have MA carry-over losses from Schedule D that you are using against non-MA bank interest, you must select Schedule D on prior screens.



Schedule B Part 2 Short-Term Capital Gains/Losses & Long-Term Gains on Collectibles

10. Short-term capital gains	0
11. Long-term capital gains on collectibles and pre-1996 installment sales (from Schedule D)	0
12. Gain on the sale, exchange or involuntary conversion of property used in a trade or business and held for one year or less	0
13. a. Add lines 10 through 12	0
b. Part-Year/Nonresidents only	0
c. Subtract line 13b from line 13a. Not less than 0	0
14. Allowable deductions from your trade or business (from Schedule C-2)	0
15. Subtotal: Subtract line 14 from line 13c	0
16. Short-term capital losses (included in U.S. Schedule D, lines 1 through 5, col. h)	0
17. Loss on the sale, exchange or involuntary conversion of property used in a trade or business and held for one year or less	0
18. Prior short-term unused losses for years beginning after 1981	0
19. a. Combine lines 15 through 18	0
b. Part-Year/Nonresidents only	0
c. Exclude line 19b (losses) from line 19a	0

Choose Next

20. Short-term losses applied against interest and dividends. Enter the smaller of lines 9 or 19c. (considered as a positive amount). Not more than \$2,000	0
21. Available short-term losses. Combine lines 19c and 20	0
22. Short-term losses applied against long-term gains	0
23. Short-term losses available for carryover in next year. Combine lines 21 and 22	0
24. Short-term gains and long-term gains on collectibles. Enter amount from line 19c	0
25. Long-term losses applied against short-term gain	0
26. Subtotal. Subtract line 25 from line 24	0
27. Long-term gains deduction. Complete only if lines 11 and 26 are greater than 0. From worksheet in instructions	0
28. Short-term gains after long-term gains deduction. Subtract line 27 from line 26	0

Cancel Save Draft  Next >

If you have carry-forward long-term losses to apply against interest, you will need to fill out Schedule D first and then return to Schedule B to enter long-term losses applied against interest. This requires going back to the Additional Income screen and answering yes to the fourth

question of “Are you reporting any long-term capital gains/losses?” You will then be able to enter the losses on Schedule D as well as the amount you want to use to offset the Interest Income on Schedule B. You will then need to come back to Schedule B and enter the same amount on line 32 of Schedule B. Select **Next** to continue.

Personal Income Tax Form 1

Progress: Interest Income, Additional Income, Interest and Dividend Income, Short-Term Capital Gains/Losses & Long-Term Gains on Collectibles, **Taxable Interest, Dividends and Certain Capital Gains**

Schedule B Part 3 Taxable Interest, Dividends and Certain Capital Gains

29. Enter the amount from line 9	1,000
30. Short-term losses applied against interest and dividends. Enter the amount from line 20	0
31. Subtotal interest and dividends. Subtract line 30 from line 29	1,000
32. Long-term losses applied against interest and dividends. Not more than \$2,000	0
33. Adjusted interest and dividends. Subtract line 32 from line 31	1,000
34. Enter the amount from line 28	0
35. Adjusted gross interest, dividends and certain capital gains. Add lines 33 and 34	1,000
36. Excess exemptions	0
37. Subtract line 36 from line 35	1,000
38. The smaller of lines 9 and 37	1,000
39. Total Taxable 0.5% and 12% capital gains. Subtract line 38 from line 37. Not less than 0. If no entry on Part 2, line 11, enter result here and on Form 1, line 23a or Form 1-NR/PY, line 27a. Otherwise, enter result here and complete the Taxable Capital Gains Worksheet in the instructions.	0
40. MA Available short-term losses for carryover in next year. Enter amount from line 23	0

Buttons: Cancel, Save Draft, **Next >**

Total federal income and federal adjusted gross income are imported from your federal return data. Review Income and Exemptions and select **Next**.

Progress: Interest Income, Additional Income, Interest and Dividend Income, Short-Term Capital Gains/Losses & Long-Term Gains on Collectibles, Taxable Interest, Dividends and Certain Capital Gains, **Review Income**

Federal Income

Total federal income	116,500
Federal adjusted gross income	115,700

Review Income

Let's review your income before we move on.

Wages, salaries, tips and other employee compensation	105,000
Total Massachusetts bank interest	300
Unemployment compensation	10,000
Total income	115,300
Total exemptions	12,800
Income after exemptions	102,500

Buttons: Cancel, Save Draft, **Next >**

Schedule Y is automatically selected only if Educator Expenses and/or Student Loan Interest is claimed on your federal return. Student Loan interest and Educator expenses reported on your federal return will be imported to Schedule Y. Select **Next** to continue.

Personal Income Tax Form 1

Interest and Dividend Income Short-Term Capital Gains/Losses & Long-Term Gains on Collectibles Taxable Interest, Dividends and Certain Capital Gains Review Income Deduction Questions

Deduction Questions

Tell us about your deductions. You can learn more about eligible deductions at [Mass.gov](https://www.mass.gov).

Did you pay rent in 2023? * Yes No

Did you pay commuting fees not reimbursed by your employer in the last year? * Yes No

Did you pay college tuition towards a qualifying two or four-year college? * Yes No

Did you make contributions towards pre-paid tuition programs or a college savings program established by the Commonwealth? * Yes No

Do you have additional deductions to report? (Reported on Massachusetts Schedule Y) Yes No

Cancel Save Draft **Next** >

Answer the deduction questions and input your total amount of rent paid if applicable. Select **Next** to continue.

Personal Income Tax Form 1

Interest and Dividend Income Short-Term Capital Gains/Losses & Long-Term Gains on Collectibles Taxable Interest, Dividends and Certain Capital Gains Review Income Deduction Questions

Deduction Questions

Tell us about your deductions. You can learn more about eligible deductions at [Mass.gov](https://www.mass.gov).

Did you pay rent in 2023? Yes No

Enter your total rent paid for 2023

Did you pay commuting fees not reimbursed by your employer in the last year? Yes No

Did you pay college tuition towards a qualifying two or four-year college? Yes No

Did you make contributions towards pre-paid tuition programs or a college savings program established by the Commonwealth? Yes No

Do you have additional deductions to report? (Reported on Massachusetts Schedule Y) Yes No

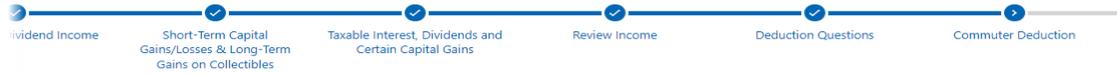
Cancel Save Draft **Next** >

If applicable, enter amounts paid by you and/or spouse for Commuter deduction expenses. Your total deduction is calculated and imported to Schedule Y. Select **Next** to continue.

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Commuter Deduction

You indicated you or your spouse paid commuting fees not reimbursed by your employer in the last year.

Amount you paid in 2023 for tolls through an E-Z Pass account	0
Amount you paid in 2023 for weekly or monthly transit commuter passes for MBTA transit or commuter rail	1,000
Your commuter deduction	750
Amount your spouse paid in 2023 for tolls through an E-Z Pass account	0
Amount your spouse paid in 2023 for weekly or monthly transit commuter passes for MBTA transit or commuter rail	1,000
Your spouse's commuter deduction	750
Total commuter deduction ⓘ	1,500

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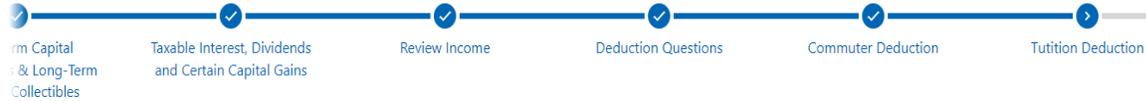


Frequently Asked Questions

If you select the college Tuition Deduction, enter information, and the College Tuition deduction amount will be calculated. If you qualify, the calculated College Tuition deduction amount will transfer to Schedule Y. Select **Next** to continue.

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Tuition Deduction

You indicated you paid college tuition towards a qualifying two or four-year college. Tuition payments for students pursuing graduate degrees are not eligible for the college tuition deduction.

Amount of tuition payments paid by you, for yourself or a dependent, to a qualifying two or four year college in 2023	35,000
Amount of scholarships, grants, or financial aid received in 2023	3,000
Amount of reimbursements or refunds received in 2023 of amounts shown in line 1 reported by an insurer (from U.S. Form 1098-T, box 10)	0
College tuition deduction ⓘ	3,075

Cancel Save Draft



Next >

Educator Expenses reported on Federal Direct File import to Line 9a. Student Loan Interest reported on your federal return imports to line 10. College Tuition deduction, contributions to pre-paid college tuition and commuter deduction will populate to the appropriate lines from amounts you entered on previous screens.

 Schedule Y : Other Deductions

1. Reserved for future use	0
2. Penalty on early savings withdrawal	0
3. Amount of deductible alimony paid (from US return)	0
4. Amounts excludible under MGL Ch. 41, § 111F or US tax treaty	0
Income received by a firefighter or police officer incapacitated in the line of duty, per MGL Ch. 41, § 111F	<input type="checkbox"/>
Income exempt under US tax treaty	<input type="checkbox"/>
5. Moving expenses for members of the Armed Forces (from US return)	0
6. Medical savings account deduction	0
7. Self-employed health insurance deduction	0
8. Health savings accounts deduction	0
9. a. Certain qualified deductions from US Form 1040	300
9. b. Certain business expenses from US Form 1040	0
9. c. Charitable contributions deduction	0
10. Student loan interest deduction	500

Select **Next** to continue.

Income received by a firefighter or police officer incapacitated in the line of duty **Staging**

Income exempt under US tax treaty

5. Moving expenses for members of the Armed Forces (from US return)	0
6. Medical savings account deduction	0
7. Self-employed health insurance deduction	0
8. Health savings accounts deduction	0
9. a. Certain qualified deductions from US Form 1040	0
9. b. Certain business expenses from US Form 1040	0
9. c. Charitable contributions deduction	0
10. Student loan interest deduction	2,500
11. College Tuition Deduction (full-year residents only)	0
12. Undergraduate student loan interest deduction	0
13. Deductible amount of qualified contributory pension income from another state or political subdivision	0
14. Claim of right deduction	0
15. Commuter deduction	0
16. Human organ donation deduction (full-year residents only)	0
17. Certain gambling losses	0
18. a. Prepaid tuition or college savings program deduction	0
18. b. Student loan repayment assistance deduction	0
19. Total other deductions	2,500

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Enter Amount paid to Social Security from W2s for you and your Spouse. The maximum allowed is \$2,000. If you enter an amount greater than \$2,000, it will automatically change to \$2,000. Rental deduction populates from the previous amount you entered for total rent paid in 2023. Social Security is prepopulated with calculated amounts based on the W-2 information. Select **Next** to continue.

Personal Income Tax Form 1



Total Deductions

Let's review your deductions before moving on.

Amount you paid to Social Security, Medicare, Railroad, U.S. or Massachusetts retirement programs (Reported on U.S. Form W-2). This amount cannot exceed 2,000.	2,000
Amount your spouse paid to Social Security, Medicare, Railroad, U.S. or Massachusetts retirement programs (Reported on U.S. Form W-2). This amount cannot exceed 2,000.	2,000
Total rent paid deduction ?	4,000
Other deductions (Reported on Massachusetts Schedule Y)	5,375
Total Deductions	13,375



Select **Yes** or **No** if you want to pay the 5.85% tax rate. Select **Next** to continue.

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\$1,864.00
Refund

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Income After Exemptions and Deductions

Total taxable income at 5%	90,125
Do you want to pay a 5.85% tax rate?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Tax on 5% Income	4,506
Tax on income from Schedule B ?	0
Total income tax	4,506



Select the appropriate answer and enter Health Insurance information in subsequent screens. Select **Next** to continue.

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Tell Us About Your Health Insurance

We will now gather information regarding your [Minimum Creditable Coverage \(MCC\)](#).

Did you and your spouse have the same full year Minimum Creditable Coverage (MCC)? * Yes No



Child and family tax credits populate depending on dependent information that was entered. Select **Next** to continue.

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Refundable Credits

Let's review the refundable credits you are eligible for.

Number of dependents under age 13 or over age 65	2
Child and family tax credit	620
Total Refundable Credits	620





Federal Earned Income Credit information will import from your federal return and 40% is calculated. Select **Next** to continue.

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Refundable Credits

Let's review the refundable credits you are eligible for.

Number of earned income qualifying children	1
Amount of earned income credit from U.S. Form 1040 Line 27. The amount cannot exceed \$3995	3,850
Earned Income Credit	1,540
Number of dependents under age 13 or over age 65	1
Child and family tax credit	310
Total Refundable Credits	1,850

Cancel Save Draft



Next >

If you qualified for the Circuit Breaker credit and completed the information previously, that information will automatically be entered here. Select **Next**.

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\$3,498.00
Refund

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Refundable Credits

Let's review the refundable credits you are eligible for.

Senior Circuit Breaker Credit (From Schedule CB)	2,465
Number of dependents under age 13 or over age 65	1
Child and family tax credit	310
Total Refundable Credits	2,775

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Next >

Select **Yes** or **No**. If you select Yes, select which fund and how much you want to contribute. Choose **Next** to continue.

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Voluntary Funds Contribution

You may contribute any amount you choose to the following funds. Remember, these amounts are added to your tax. They increase the amount of your payment or reduce the amount of your refund.

- Endangered Wildlife Conservation Funds
- Organ Transplant
- Public Health HIV and Hepatitis
- U.S. Olympic
- Military Family Relief
- Homeless Animal Prevention

Do you want to contribute towards any voluntary funds? *

Yes

No

Cancel

Save Draft

Next >

Frequently Asked Questions

Information on credits and withholding will automatically populate from information entered previously. Enter Use tax, previous year overpayment, estimated payments and extension payments. **Total payments and credits** will include Refundable Credit amounts based on information entered previously (such as Earned Income Credit, Child and family tax credit and/or Circuit Breaker credit). Select **Next** to continue.



Tax Calculation

Your withholding and payments have been calculated. Please review and make any necessary updates to your payment amounts.

Use tax due on Internet, mail order and other out-of-state purchases	0
Income tax after credits, contributions, use tax and health care penalty	4,506
Massachusetts income tax withheld (From W-2s, 1099s, and other sources)	5,750
Previous year overpayment applied to your 2023 estimated tax	0
2023 state estimated tax payments	0
Payments made with extension	0
Total payments and credits	6,370
Overpayment	1,864
Refund amount	1,864
Tax Due	0

Cancel

Save Draft

Next >

Choose refund preferences and enter the required information. Select **Next** to continue.

MassTaxCONNECT MassTaxConnect

< SNOW STORM

Personal Income Tax Form 1 **\$1,864.00**
Refund

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Information 1099-HC - Spouse Credits Voluntary Funds Contribution Tax Calculation Refund

Refund

Would you like to apply some of your refund towards next year's estimated tax? This will reduce your refund Yes No

Would you like your refund issued as a direct deposit? Yes No

Your refund will be mailed to **100 Cambridge St LBBY Boston MA 02114-2529.**



Confirm information and select **Submit** to submit your completed return.

Review Return

Review this information is accurate and then submit your return. If you notice something was entered incorrectly, correct it before submitting the return.

Total taxable income at 5%	90,125
Total income tax	4,506
Health care penalty	0
Income tax after credits, contributions, use tax and health care penalty	4,506
Total payments and credits	6,370
Overpayment	1,864
Refund amount	1,864
Tax Due	0

Declaration

By submitting this return, I declare under the penalties of perjury that I examined the information that I am submitting and it is, to the best of my knowledge and belief, true and complete.

Cancel

Save Draft



Submit

You will be taken to the confirmation page. You have the option to give feedback.

Personal Income Tax Form 1 - Confirmation

- **Return Confirmation Number:** 0-861-831-456
- **Submitted Date and Time:** 1/30/2024 11:28:10 AM
- **Taxpayer Name:** SNOW STORM
- **SSN:** ***-**-4236
- **Credit:** \$1,864.00
- **Return Period:** 12/31/2023

Your return has been filed successfully. You will receive an email shortly containing this confirmation number and other details. Please print this page and save the confirmation number above for your records. Please **do not** mail in a paper return.

View Your Submission

You can view details about your submission any time by logging into your MassTaxConnect account, selecting the **More...** tab, and clicking the **Search Submissions** link under the **Submissions** section. Submissions in a status of *Submitted* can be viewed and deleted by clicking the corresponding hyperlinks. Depending on the submission type, you may also have an *Edit* hyperlink which allows you to make changes to the submission.

Print Your Tax Return

Once your return is processed, you can print a copy of your tax return at any time by logging into your MassTaxConnect account, selecting the **View Returns** link next to your Personal Income Tax account, select the **View/Amend** next to the period you wish to print then select *Save a Copy of Return*. Please note, it may take up to 24 hours to process the return.

Contact Us

If you need further assistance, please contact the Department of Revenue at (617) 887-6367 or toll-free in Massachusetts at (800) 392-6089. Business hours are Monday through Friday, 9:00 a.m. to 4:00 p.m.

Feedback

How satisfied were you with this process?



Comments