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## Introduction

CalFile was developed in 2003, to provide taxpayers with a free, secure, and direct online application to e-file their state income tax return. Per survey responses, the most common reasons for using CalFile are:

- It's fast.
- It's free.
- It's convenient.

CalFile eases the filing burden for taxpayers because it eliminates the need to predetermine which form to file. The taxpayer just answers basic questions to complete their return.

CalFile has grown in popularity by nearly 77 percent since its first full filing season. In 2004, nearly 110,000 CalFile returns were filed, and in 2008, over 190,000 CalFile returns were filed. CalFile is available to more than 6 million taxpayers and is also available in Spanish.

For more information, preview CalFile and refer to the [CalFile qualifications](#).



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## Facts

### Description

CalFile is a direct online application developed for taxpayers to complete and e-file their state personal income tax return. CalFile is a quick online process, which on average takes 15-30 minutes to complete. CalFile eases the filing burden for taxpayers by guiding them through an easy question and answer process. Within the CalFile application, there are help files that assist the taxpayer with questions they may have. Taxpayers do not need to know which tax form to file to use CalFile; they only need to verify that they meet the CalFile qualifications.

Taxpayers can e-file their tax return using CalFile or CalFile Spanish from January 2, 2009, through October 15, 2009.

### Eligibility

More than 6 million taxpayers qualify to use CalFile. CalFile is available to all 540 2EZ and 540A filers, and some 540 filers. CalFile accepts income of up to \$326,379, itemized deductions, and the following tax credits:

- Personal exemption credit.
- Senior exemption credit.
- Blind exemption credit.
- Dependent exemption credit.
- Nonrefundable renter's credit.
- Child and dependent care expenses credit.

For more information, refer to the [CalFile qualifications](#).

[More Facts](#)



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## Facts (continued)

CalFile is not available to taxpayers who:

- Are filing a 2008 return on behalf of a person who died.
- Are requesting a military-related or disaster-related extension.
- Need to claim a disaster loss.
- Have business or farming income or loss.
- Have capital gains or losses.
- Have income or loss from rental real estate, royalties, partnerships, S-corporations, estates, trusts, REMICs, etc. (federal Schedule E).

For more information, refer to the [CalFile exceptions](#).

## Benefits of CalFile

- Free.
- Fast.
- Easy.
- Convenient.
- Direct-to-government e-filing option.
- Refunds usually in less than one week with direct deposit.
- File now and pay later options.\*
- Instant confirmation that a return has been received.
- Available 24 hours a day, seven days a week.
- Available in Spanish.

Taxpayers can e-file their tax return using CalFile or CalFile Spanish from January 2, 2009, through October 15, 2009.

\* Taxpayers can file their return and schedule their payment to be deducted from their bank account at a later date. For example, they can file their return now, and schedule their payment to be made April 15. Or, the taxpayer can return to our website and use [Web Pay](#) to make a payment after they use CalFile to e-file their return.



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## FAQs

### Who is eligible?

Generally, CalFile is available to taxpayers who:

- Are filing a 2008 California personal income tax return.
- Use any filing status.
- Were a California resident all year in 2008.
- Claim standard and itemized deductions.
- Claim up to 10 dependents.
- Have a Federal Adjusted Gross Income (AGI) up to:
  - \$163,187 for single and married/registered domestic partners (RDP) filing separately.
  - \$244,785 for head of household.
  - \$326,379 for married/RDP filing jointly and qualifying widow(er).

### How much do taxpayers pay to use CalFile?

Nothing. CalFile is free e-file for all taxpayers who qualify to use it.

### Do taxpayers need to know what form to use?

Taxpayers do not need to know which form to use with CalFile; they only need to verify that they meet the CalFile qualifications. CalFile guides taxpayers to answer basic questions and CalFile automatically completes their state tax return. For more information, refer to [CalFile qualifications](#).

### What software is required to use CalFile?

- Adobe Acrobat or Adobe Reader (version 6.0 or higher) to view and print the return. They can download the latest version of Adobe Reader for free from [Adobe](#).
- A [compatible browser and operating system](#).

[More FAQs](#)



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## FAQs (continued)

### If taxpayers owe money can they use CalFile?

Yes. Taxpayers who use CalFile and owe money, can choose to pay by check, credit card, or send the payment electronically with their return. They can e-file their return now, and schedule their electronic payment for a later date. The taxpayer can also visit our Website and use **Web Pay** to make a payment after they use CalFile to e-file their return. Taxpayers can review all of these options on the **Refund or Payments** page within CalFile.

### Can taxpayers use CalFile if their last name changed in 2008?

Yes. However, if a taxpayer's last name changed in 2008, they need to enter the last name they used on their 2007 tax return to access CalFile. Then they need to enter their new last name on the **Name and Address** page in CalFile.

Taxpayers who have not previously filed a California tax return need to call our Taxpayer Services Center. When they call, they need to provide either their California driver's license or California identification number. Please call:

- From within the United States: 800.353.9032.
- From outside the United States: 916.845.6600 (*not toll-free*).

**Assistance for Persons with Disabilities:** We comply with the Americans with Disabilities Act. Persons with hearing or speech impairments, please call TTY/TDD 800.822.6268.

### What is new for CalFile this year?

There are two changes to CalFile this year:

- Taxpayers can now claim up to 10 dependents.
- CalFile now checks all taxpayers for eligibility for ReadyReturn and offers them the option to switch to ReadyReturn, if they qualify.



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## Testimonials

*"I am grateful that I can file directly to the Franchise Tax Board without extra expense and that it was so easy. Thanks."*

*"This is so quick, simple. I love using CalFile."*

*"Very user-friendly. Nice."*

*"Excellent. Love the site, very user-friendly, LOVE IT."*

*"Very easy. Very quick. Thank you."*

*"CalFile is just simple and fast. Love it."*

*"It's a fast, easy, and secure way to file my state tax."*

*"I think CalFile is great and easy, too. I can help my parents file as well for no charge."*

*"THIS WAS SUPER GREAT. SOOOOOOOOOOOOOO EASY."*

*"I like it. I didn't need to do all the silly calculations like I did for the federal tax."*

*"CalFile is so much easier and saves so much time. Paper filing is so obsolete and should be done away with altogether."*



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## Article

*Available to copy and use in your newsletter, publication, or website.*

### **FTB's CalFile Saves Time**

*Complete Your Tax Return Online in Just Minutes*

Our free e-file program, CalFile, is a quick online process, which on average takes 15-30 minutes to complete. CalFile's convenient features and benefits include file now and pay later options, instant confirmation that a return has been received, and refunds in less than one week with direct deposit. CalFile is available in both English and Spanish, 24 hours a day, seven days a week.

"All the figures are calculated for me and the process is fast and free," said a taxpayer returning to CalFile this year. CalFile simply eases the filing burden for taxpayers by guiding them through an easy question and answer process. Taxpayers do not need to know which tax form to file to use CalFile, they only need to verify that they meet the CalFile qualifications.

More than 6 million Californians can save time and e-file their tax returns using CalFile or CalFile Spanish from January 2, 2009, through October 15, 2009. Go to [ftb.ca.gov](http://ftb.ca.gov) and search for CalFile to find out if you qualify!



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## Demo

Click on the link below to open a demonstration of the CalFile program.

[CalFile Demo](#)



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## Logos

Click on the links below to open different variations of the CalFile logo.

Low Resolution (for web) - jpeg file

[Color CalFile Logo](#)

[Black and White CalFile Logo](#)

High Resolution - jpeg file

[Color CalFile Logo](#)

[Black and White CalFile Logo](#)



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## Postcard

Click on the link below to open the CalFile Postcard (PDF).

[CalFile Postcard](#)

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For more information go to the FTB website:

[ftb.ca.gov](http://ftb.ca.gov)



State of California  
**Franchise Tax Board**