

# CalFile

Free California e-file

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State of California  
Franchise Tax Board

## 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 is a quick online process, which takes about 15-30 minutes to complete. CalFile eases the filing burden for taxpayers by guiding them through an easy question and answer process. To access CalFile, the taxpayer only needs to provide SSN and last name. Taxpayers can e-file their tax return using CalFile from January 3, 2011, through October 17, 2011.

CalFile has grown in popularity by over 115 percent since its first full filing season. In 2004, nearly 110,000 CalFile returns were filed, and in 2010, over 237,000 CalFile returns were filed. CalFile is available to more than 6 million taxpayers.

For more information, go to [ftb.ca.gov](http://ftb.ca.gov) and search for **CalFile**.

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## Eligibility

Generally, CalFile is available to taxpayers who:

- Are filing a 2010 California personal income tax return.
- Use any filing status.
- Were a California resident all year in 2010.
- Claim standard and itemized deductions.
- Claim up to 10 dependents.
- Have a federal Adjusted Gross Income (AGI) up to:
  - \$162,186 for single and married/registered domestic partners (RDP) filing separately.
  - \$243,283 for head of household.
  - \$324,376 for married/RDP filing jointly and qualifying widow(er).

CalFile is available to all 540 2EZ and 540A filers, and some 540 filers. CalFile accepts income of up to \$324,376, 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.

CalFile is not available to taxpayers who:

- Are filing a 2010 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 qualifications](#).

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## Benefits

- 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.\*
- Takes about 15-30 minutes to complete.
- Instant confirmation that we received their return.
- Available 24 hours a day, seven days a week.

## Testimonials

*"This is great customer service. Thanks for the e-filing availability."*

*"I have always e-filed my returns but have never used an easier or quicker one than CalFile. It was great. I would recommend this to anyone."*

*"This is the second year I have been using your system... I am not computer savvy and your system is idiot-proof. THANKS."*

*"Love It! The best thing the State of California has done."*

*"I hope California continues to have CalFile."*

*"Thank you so much for making this tool available to us. It is quick, accurate and convenient. I would imagine it's a great cost savings to the state as well. Good job guys!"*

\* 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

### 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 Reader 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](#).

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

Yes. Taxpayers who use CalFile and owe money can choose to 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](#) or pay by check or credit card. 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 2010?

Yes. However, if a taxpayer's last name changed in 2010, they need to enter the last name they used on their 2009 tax return to access CalFile. Then they need to enter their new last name on the [Name and Address](#) page in CalFile.

### Can first-time filers use CalFile?

Yes. However, 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 license or California identification number.

#### Phone

800.353.9032	Within the United States
916.845.6600	Outside the United States
800.822.6268	TTY/TDD

[More FAQs on our website](#)

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## Statistics and Feedback

### Statistics for Tax Year 2009

- Over 237,000 returns filed using CalFile.
- Projections: 260,000 for tax year 2010; 280,000 for tax year 2011.
- CalFile made up 10% of all do-it-yourself e-file returns filed in 2010.

### CalFile user feedback for Tax Year 2009

- **97%** stated they were satisfied with CalFile.
- **98%** stated they would use it again.
- **83%** stated they chose CalFile because it was free.
- **55%** chose CalFile because their return goes directly to FTB.

### Program Costs

- Annual Operation Costs: \$100,000
- Average Cost to Process a CalFile Return: **\$0.34**
- Average Cost to Process a Paper Return: **\$2.59**
- CalFile is expected to produce a net savings in 10/11:

Cost to Process if Filed on Paper (260,000 x \$2.59)	\$673,400
Cost to Process CalFile Returns (260,000 x \$0.34)	\$88,400
<b>Estimated Cost Savings/Avoidance</b>	<b>\$585,000</b>
Projected 10/11 CalFile Maintenance Costs	\$100,000
<b>Net Savings to State Due to CalFile</b>	<b>\$485,000</b>



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### Article

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

#### **Franchise Tax Board's CalFile Saves Time**

*Complete Your California Tax Return Online in Minutes*

CalFile is **FREE** and guides you through basic questions to complete and e-file your tax return. You provide the information and CalFile does the calculations for you.

CalFile's convenient features and benefits include file now and pay later options, instant confirmation that we received your return, and refunds in less than one week with direct deposit. CalFile is available 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 from January 3, 2011, through October 17, 2011. Go to **ftb.ca.gov** and search for **CalFile**.

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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](#)

## Videos

Click on the links below to open the CalFile videos (links to our YouTube page).

[CalFile](#)

[CalFile Beats Paper \(HD\)](#)

[CalFile Drawing](#)

[CalFile: Free California Taxes Online \(HD\)](#)

[File Your California State Taxes with CalFile for Free in 3 Easy Steps \(HD\)](#)

To see other videos, visit our [Franchise Tax Board YouTube](#) page.

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Website

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

Toll-Free Automated Phone

800.338.0505

**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.

**Public Affairs Office**

The Public Affairs Office responds to all media contacts. Members of the media can contact the Public Affairs Office at 916.845.4800 or [publicaffairsoffice@ftb.ca.gov](mailto:publicaffairsoffice@ftb.ca.gov).