CalFile

Free California e-file

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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 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 2, 2014, through December 15, 2014.

In 2004 (CalFile's first full season), nearly 110,000 CalFile returns were filed, and in 2013, over 259,000 CalFile returns were filed. CalFile is available to more than 6 million taxpayers.

Beginning in 2014, taxpayers can use CalFile to file their 2013 (current year) or 2012 (previous year) return.

For more information, go to **ftb.ca.gov** and search for **CalFile**.

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Eligibility

Generally, CalFile is available to taxpayers who:

- Are filing a 2013 or 2012 California personal income tax return.
- Use any filing status.
- Were a California resident for the entire year they are filing.
- Claim standard and itemized deductions.
- Claim up to 10 dependents.

CalFile is available to all 540 2EZ filers, and some 540 filers. CalFile accepts income of up to $345,235 for the 2013 tax year and $339,464 for the 2012 tax year, itemized deductions, and the following tax credits:

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

CalFile is not available to taxpayers who:

- Are filing a 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: 2013 | 2012**.

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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: 2013 | 2012**.

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 I file a previous year tax return with CalFile?

Yes. Starting in 2014, CalFile now allows taxpayers to file their current year return (2013) as well as their previous year return (2012).

Can taxpayers save a partially completed return and finish it later?

Taxpayers can save a partially completed return and finish it later. They will need to have an online account (user name and password) to file and access their return.

More FAQs on our website

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Statistics and Feedback

Statistics for Tax Year 2012

- Almost 260,000 returns filed using CalFile.
- Projections: 275,000 for tax year 2013.

CalFile user feedback for Tax Year 2012

- **97%** stated they were satisfied with CalFile.
- **95%** stated they would use it again.
- **93%** stated they chose CalFile because it was free.
- **75%** 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 13/14:

Cost to Process if Filed on Paper (275,000 x $2.59)	$712,250
Cost to Process CalFile Returns (275,000 x $0.34)	$93,500
Estimated Cost Savings/Avoidance	**$618,750**
Projected 13/14 CalFile Maintenance Costs	$100,000
Net Savings to State Due to CalFile	**$518,750**

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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 2, 2014, through December 15, 2014. 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

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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.