

# General Information

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## What is South Carolina Fillable Forms?

South Carolina Fillable Forms is a FREE online forms based tool enabling you to:

- Prepare your South Carolina resident income tax return and limited schedules by filling in your tax information online just like completing a paper return
- Perform basic mathematical calculations
- e-file your South Carolina income tax return, OR
- Print your tax return for record keeping or filing

Fillable Forms provides individual taxpayers with a comparable experience to completing paper forms except in an electronic environment on your computer. This free forms-based program allows taxpayers to choose the South Carolina income tax forms and limited schedules they need. You can fill in information, e-file, and sign the return electronically. Always print a copy for record keeping! Fillable Forms is made available by the South Carolina Department of Revenue through the South Carolina Fillable Forms program.

- If you are comfortable filling out the forms and schedules without software help or assistance, South Carolina Fillable Forms is the tool for you.
- If you are not comfortable with South Carolina Fillable Forms, you may want to consider choosing a South Carolina Free File option.
  - If you don't meet the requirements for Free File, choose the paid EFile option.

## Is the South Carolina Fillable Forms program new and what is the goal?

No, South Carolina Fillable Forms is in its fifth year with the tax year 2016 filing season. The goal of South Carolina Fillable Forms is to provide resident individual taxpayers with the electronic equivalent of the paper forms and instructions the State of South Carolina currently provides.

## How is South Carolina Fillable Forms different from tax software?

Unlike most tax software, South Carolina Fillable Forms is a simple electronic equivalent of paper forms. It provides basic mathematical calculations and basic field error checking. It does not ask about or explain tax situations, automatic calculations, or perform extensive error checking.

## **Can I use South Carolina Fillable Forms to prepare and e-file my federal tax return?**

No. The program provides forms for the South Carolina 1040 resident return only, while most tax software provides federal and state. If you want to prepare and file your federal income tax return, you need to choose an e-File program that allows you to prepare both the state and federal return together. Go to the Free File tab under Available Services on the Electronic Services page at [www.dor.sc.gov](http://www.dor.sc.gov) for the option that best suits your needs.

## **Do I have to create a new account each year?**

Yes. The software provider does not retain your account information for subsequent years.

## **How is this method different from choosing a Free File tax software program?**

There are no income limitations. If you don't qualify for one of the Free File software products, you can use South Carolina Fillable Forms to file your resident return online. See "What are the qualifications to use Fillable Forms for South Carolina?"

## **When Will I Get My Refund?**

You can get tax return refund information through the South Carolina Department of Revenue's "Refund Status" link under QuickLinks on the home page. You may also call 803-898-5300 using a touch tone phone to check the status of your refund. You will need to enter two information items from your return:

- Your Social Security Number (SSN) or Individual Taxpayer ID Number (ITIN)
- The exact whole dollar amount of your expected refund.

## **What is the advantage over filling out a "pencil and paper" return?**

Unlike paper returns, South Carolina Fillable Forms provides basic math calculations and basic field validation checking. E-filed returns are typically accepted or rejected by the South Carolina Department of Revenue within 24-48 hours. Taxpayers receive their refunds in less time, compared to paper returns.

## **Can I print my South Carolina return for free?**

Yes, you can print a copy of all required South Carolina forms and supporting documents for your records for free.

## **I forgot to print my return before I e-filed. Can I get a copy?**

Yes, return to your account and print your return. Print buttons are on the top and bottom of the screen.

## **Do I have to pay to e-file or print my return?**

No, e-filing and/or printing your South Carolina tax return is free.

## **What if I can't (or don't want to) e-file? Can I just print my return and mail it in?**

Yes, South Carolina Fillable Forms supports both e-filing and printing your return to mail to the South Carolina Department of Revenue.

## **What are some tips for avoiding common errors?**

Make sure:

- Your Social Security Number or Employee Identification Number contain the proper number of digits,
- You do not enter invalid characters,
- The date and telephone number fields are formatted correctly and do not contain invalid characters,
- Your e-mail address is correct,
- The tax amount has been calculated; and
- Your deduction and exemption amounts have been calculated.

## **Will I be able to view my actual return before I e-file it?**

Yes. We encourage you to review your data before submitting your return. Please make certain that all information is complete and accurate. This simple precaution will help you avoid mistakes that can delay your refund or result in correspondence from the South Carolina Department of Revenue.

## **What information should I retain for my records?**

After you submit your return, print a copy for your records. You should retain this along with other supporting documentation (Forms W-2, 1099, and other attachments) and your username and password.

## **Why do I have to give you my e-mail address?**

South Carolina Fillable Forms requires an e-mail address for taxpayers who will need to track the status of their returns via e-mail. After e-filing, taxpayers will receive an acknowledgement of successful filing. It will be followed by a message containing the return status from the South Carolina Department of Revenue by way of the South Carolina Fillable Forms provider. Returns are either accepted or rejected. This is important information, since if the return is rejected, it means that it has not been filed. You will need to fix the issue that caused your return to reject. Either e-file again or print and file by mail.

## **Can I change my e-mail?**

Yes. You can sign in to your account and edit your account information.

## **Do I need to mail any forms to the South Carolina Department of Revenue; for example, my W-2, Form W2-G, Form 1099-MISC or Form 1098?**

No. If you e-file, you do not need to mail in anything. Retain a copy of your return as well as your W-2s/1099s or any other information statements. You are required to keep your return and supporting documentation for three years from the due date of the return. However, if you choose to print and file the paper return, you must include all W-2 forms and any other information statements that have South Carolina withholding on them.

## **I discovered a mistake after I e-filed. Can I get my return back?**

No. Once your return is transmitted and accepted, it's like dropping it in the mailbox. You can't get it back. If you need to make a change, you will need to file an amended return (SC1040X) on paper. If your return is rejected, then you can make any necessary changes and resubmit your return electronically.

## **Do I need to do anything else after e-filing my return?**

Yes, you should track your return to make sure the South Carolina Department of Revenue accepts it. If you entered your valid e-mail address in State Fillable Forms, you will receive acknowledgement of successful transmission followed by acknowledgment that the South Carolina Department of Revenue has accepted or rejected your return. If you printed and filed your return[s], you can get refund information about your South Carolina income tax return through the South Carolina Department of Revenue's "Where's My Refund" link. You will need to enter two pieces of information from your return:

- Your Social Security Number or Individual Taxpayer ID Number
- The exact whole dollar amount of your expected refund

## **How to Pay a Balance Due?**

If you file your return using South Carolina Fillable Forms:

- You can choose to use the EFW/direct debit method. Fill in the required information on the e-filing worksheet.
- If you print and mail your return, you can use the South Carolina Department of Revenue's EPay application to submit the SC1040V; or print out a SC1040V from the South Carolina Fillable Forms application and mail it in with your check.

## **What You Need to Know Before Getting Started**

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### **What do I need before starting?**

Have available:

- A completed copy of your federal tax return.
- All income and tax statements you received for 2016, such as Forms W-2, W-2G, 1099-G, 1099-INT, and 1099-R.
- Your 2016 estimated tax payment amounts, if any.
- If you are going to use direct deposit for a refund, or use EFW (electronic funds withdrawal) to pay any taxes owed, you'll need your routing number and account number for your checking or savings account. Please get these from your personal checks and NOT a deposit slip.

### **What forms are supported by South Carolina Fillable Forms for South Carolina?**

The Fillable Forms program supports the South Carolina resident return and a limited number of companion schedules.

- SC1040
- SC I-319
- SC I-330
- SC1040V

## **What are the qualifications to use South Carolina Fillable Forms for South Carolina?**

With South Carolina Fillable forms, there are no limitations for income, age, or location. However, there are some limitations if you plan to e-file your return. You can still use the program, but you will have to print and mail in the return.

## **If I need a form that isn't supported, can I still use South Carolina Fillable Forms to do my return?**

No. Access the South Carolina website at [www.dor.sc.gov](http://www.dor.sc.gov) to find other alternatives for preparing and filing your return.

## **Can I use South Carolina Fillable Forms for filing a prior-year tax return?**

No. Only the current tax year resident forms are available in South Carolina Fillable Forms.

## **How secure is my information?**

Your internet session and transmission of your South Carolina return will be encrypted in a secure environment. All your tax information entered in South Carolina Fillable Forms is protected with industry - standard security. When you e-file, the transaction is encrypted with the same technology used by banks in protecting online transactions. This means that your information is protected from any unauthorized access while it's sent to the South Carolina Department of Revenue.

## **Where is my data stored?**

All tax data is stored in the secure South Carolina Fillable Forms database. Fillable Forms is hosted and owned by an approved South Carolina Free File 3rd party commercial vendor that partners with the South Carolina Department of Revenue. We recommend you review the vendors Privacy Policy and Terms of Service included on every page of the South Carolina Fillable Forms program.

## **Can I retrieve my return online in the future and for how long?**

You will be able to access your tax return through the last day you can file a tax return through the South Carolina Fillable Forms program for the current tax year. After that, your return will be backed up and then removed from the South Carolina Fillable Forms database. Sign in to your return with your user ID and password.

## **How do I start using South Carolina Fillable Forms?**

You must access the program by going to the South Carolina Department of Revenue Free File page and clicking on the South Carolina Fillable Forms link.

## **Do you sell any of my information to other companies?**

No. The information entered in South Carolina Fillable Forms will not be sold or marketed to any companies.

## **How long will this be available?**

South Carolina Fillable Forms for the current tax year will be available until at least October 20, 2017.

## **Can I electronically file using South Carolina Fillable Forms if my address is in a foreign country?**

No. If the address on SC1040 is in a foreign country, you will not be able to electronically file your return. You can still complete the forms and enter the foreign country in the city field, but you will need to print and file your return by mail.

## **How to Use Fillable Forms for South Carolina**

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### **How do I create an account?**

After selecting South Carolina Fillable Forms on the South Carolina Department of Revenue Free File page, continue through to the “forms screen” and create an account. You’ll provide your own user ID and password, which you will save. You will use this information each time you sign in to your return. You will also enter your “e-mail address” so that you can be notified of errors; acknowledge receipt of your return, and so you can track the status of your return. Once you establish an account, you will be sent a confirmation email with your username and a link to access the application. When returning to the site, in the future, use the link provided in the confirmation email.

### **How do I change my account information?**

To change your account information, click the "Update Account Information" link at the bottom right corner of the sign in screen. Input your password and the account screen will appear. At this account screen, you will have four choices:

- Change your user ID
- Change your password

- Change your security question
- Change your e-mail address

Click the appropriate link and follow the instructions to make the necessary changes. Click "Save" when finished.

## **How do I attach a different form?**

To attach a form or schedule to your return:

1. Click the "Add" button located at the line where the information from that form will go.
2. Input the information into the form or schedule and use the "Do the Math" button when necessary.
3. Click "Done with this Form" when finished.
4. **IMPORTANT:** Make sure your number entries reported on a schedule have also successfully transferred to where they need to be reported on the SC1040 return. A form will not attach another form until there is a link.

The form will now be attached to your tax return. To check which forms you currently have attached, click the "View / Add Forms" button at the upper right corner and a list of all of the forms that you currently have attached will display.

## **How do I access my account if I want to correct an error?**

Access your account by using the URL shown in your "New Account Confirmation" email. That email is sent by the software provider when you created your account. Once you are on the provider's page, select "Sign In / Create an Account", and then put in your username and password on the next screen.

## **How do I navigate through the program?**

Once you are in the South Carolina Fillable Forms product:

- Remember - Do not use your browser's back button. Instead, to return to the previous screen...click "Done With Form" at the bottom of the screen.
- You will use two basic elements: buttons and tabs.

After you have completed the forms, click "Done With Form" at the bottom of the screen. On the left side of your screen, you'll see a list of forms completed that will build as you work. You can click on any form in this list to re-open the form.

At the top of your screen, there are two tabs – one for the South Carolina Fillable Tax Forms and the other for e-filing your return. When you have completed all your forms, select the e-file tab to e-file your return.



## **Are there required entry fields?**

Yes, you must enter your name, Social Security Number, address, telephone number and personal income information. If you file electronically, all fields on the e-file worksheet must be completed.

## **Should I round entry fields?**

No, the South Carolina Fillable Tax Forms program does the rounding for you.

## **Should I include dashes, dollar signs, commas or text with my data entries?**

No. Please exclude all dashes, dollar signs, and commas.

## **When should I click the "Do the math" button?**

The "Do the math" button runs calculations for you. Make sure to click "Do the math" after you complete each section of a form. If you're unable to enter information into a certain field, the field is a calculated field for you. You will see it completed if all pertinent data is provided and after you click on the "Do the math" button.

## **What do the different colors mean?**

Calculated fields will be displayed in blue. All other fields will be displayed in green. Messages will appear in red boxes.

## **Why are some fields automatically calculated while others require manual data entry?**

Fields that can be calculated with simple math are calculated. If the calculation is conditional on other information, like filing status, the field is not calculated and must be entered manually.

## **How do I know which fields automatically calculate?**

Automatically calculated fields will not allow data entry. When you click in the field, a flag will indicate the field is automatically calculated.

## **If I need help with a line number, what should I do?**

Each line of the main form contains a link to any form, schedule or instructions related to that line. Click on the link for additional help. You may also refer to specific South Carolina Department of Revenue instructions for the relevant form, schedule or publication.

## **May I make changes after I have entered all my information?**

Yes. After you have entered all the information, you can still go back and make corrections BEFORE you e-file. If your return is rejected during the e-file process, you can log back into your return, make the necessary corrections, and e-file the return again.

## **Nothing happens when I click the "View/Add" Forms button. What's wrong?**

This button opens a window on the left side of the screen that displays a list of forms in the return. If this window is already open, selecting "View/Add Forms" will not result in any action.

## **Why can't I enter information into a field?**

If you're unable to enter information in a certain field that means the field is calculated for you. Select the "Do the Math" button to run the calculations. Another possibility is that the form related to that field is not supported in South Carolina Fillable Forms.

## **I selected a button on one of my forms, and now I can't undo it.**

If you select a radio button on one of the forms and find you can't "uncheck" it, just click on the selected button and then press the delete key.

## **May I save my return and finish it later?**

Yes. Just return to the Free File page on the South Carolina Department of Revenue's website and click on the South Carolina Fillable Forms link. You will need to remember and enter your user ID and password for access.

## **I closed the "My Tax Forms" area on the left. How do I get it back?**

Select the "View/Add Forms" at the top of your screen.

## **What if I enter the wrong data?**

If you make an error (such as entering the wrong data from a statement), just go back to delete the wrong information and enter the correct information. If the form is no longer needed, you can select the "Remove This Form" button at the bottom of the screen.

## **How do I know if South Carolina Department of Revenue received my state return?**

You will receive an email confirmation within 48 hours that your return was received by the South Carolina Department of Revenue.

## **What if I forget my password, user name or security questions?**

If you forget your password or username, you will be able to retrieve this information at the beginning of the program. Access the link that says "Forgot Username/Password?" at the "Sign in Screen". After answering your security question correctly, a new username or password will be emailed to you. If you are unable to recover your password because you do not remember your security question/answer, you will need to create a new account and start over with your return.

## **What if I receive an email that my return has not been accepted by the South Carolina Department of Revenue due to errors?**

E-filed returns are rejected for a variety of reasons. If your return is rejected by the South Carolina Department of Revenue, it means it has not been filed. It's important to resolve the issue that caused the rejection. You can attempt to e-file again. If you can't resolve the issue or choose not to e-file, you need to print the return and file it by mail. The address to mail your completed South Carolina return is printed at the bottom of page 3 of the SC1040.

## **Who is responsible if there are errors on the return?**

It is your responsibility to enter all information completely and accurately. Before you begin, be sure to have all information you will need to complete your return. Always verify all information on your return before submitting it.

## **What if I do not have to report a Form W2, Wage and Tax Statement, but I have other income that I need to report, may I still use South Carolina Fillable Forms?**

Yes. At the screen that reads "Step #2, e-file Your Tax Forms", you will click on the box indicating that you don't need to provide any W2, Wage or Tax Statement info.

## **I received an email from the South Carolina Department of Revenue with an error code. What does the error code mean? How do I go about correcting the errors?**

E-filed returns can reject for a variety of reasons. If your return is rejected by the South Carolina Department of Revenue, it means it has not been filed. It's important to resolve the issue that caused the rejection. You can then attempt to e-file again. If you can't

resolve the issue or choose not to e-file, you need to print the return and file it by mail. The address to mail your completed South Carolina return is printed at the bottom of page 3 of the SC1040. A list of the top reasons for returns being rejected and how to correct them will be maintained at the top of this document.

### **I didn't receive a confirmation email after my account was created. What should I do?**

If you did not receive a confirmation email when you created an account, it is possible that your spam filter is blocking the email. Check your email account for a spam folder, open it, and look for an email from customer\_service@ scfillableforms.com. Each e-mail program and spam filter differs. Please check your email account or service provider for additional help. If you still have not received the e-mail after this step, contact us at 803-896-1715.

### **How do I enter information from more than one W-2?**

When entering withholding information into the fillable forms, you will need to manually add multiple W-2's and 1099's together and enter the total on either lines 18a and/or 18b. When preparing your return for e-filing, you can add multiple W-2 forms. On the "E-File Your Tax Forms" tab, click the Add button next to the information about entering W-2s, near the top.

### **What should I check on my return before I file it?**

Your tax return could be rejected for incorrect or incomplete information. When you complete all the required information for electronic filing and click "Continue", your tax return will be transmitted to the South Carolina Department of Revenue. To ensure that your tax return is accepted, make sure you have done all of the following items.

- Calculated and entered your tax amount
- Entered your direct deposit and EFW/direct debit information accurately. Please make sure you designate the type of bank account (Checking or Savings) you are providing for the direct deposit or EFW.

In order to successfully EFile your return, make sure you have entered all of the following information:

- Email address – in both boxes to validate. Make sure both email addresses match exactly.
- Date of birth
- Current date
- Disclosure statement checkbox is checked
- If using EFW (electronic funds withdrawal aka Direct Debit), all of the following information must be provided...

- Routing Transit Number (RTN)
- Bank Account Number
- Withdrawal date
- Type of account
- Will the fund originate from an account outside of the U.S.?

### **What happens if I start a return, but don't come back and finish it?**

No matter when you start your tax return, it will be accessible in the South Carolina Fillable Forms system until October 20th. At that time, the return will be removed from the database. Your return will not be filed or e-filed.

### **Are you able to delete my data upon request?**

No. You can delete your data by selecting the “Start Over” option and then sign out of the return. This will clear any data previously entered in your tax return.

### **How do I fix mistakes or make changes after I've filed my return?**

If you need to make changes before you e-file or print your return, simply review the entries on your forms and make the changes. If you realize you made a mistake and have already e-filed, you will need to wait until the return is either accepted or rejected by the South Carolina Department of Revenue. If rejected, correct the mistakes and the reason for rejection and e-file again. If your return has been accepted or you have already dropped it in the mail box, you'll need to file an amended paper return (SC1040X) to make any corrections.

### **Can I save a copy of my return onto my computer?**

Yes! You must change your default printer to Adobe PDF, Microsoft Image Writer or another program that will allow you to capture (print) your return in an electronic format. However, we always recommend you have a printed copy in case you have hard drive issues later.

### **I forgot to print a copy of my return for my records. What do I do?**

Sign in to your South Carolina Fillable Forms return with your username and password, and select Print at the bottom of the screen.

## **Why don't the forms that print out look like the forms I see on the screen?**

Computer generated forms frequently differ from what you see on the screen and from what you are used to seeing. The computer generated forms are designed to more efficiently process through the South Carolina Department of Revenue's automated processing systems. Those systems use imaging technology to process the returns with minimal manual intervention.

## **How to Get Help**

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### **If I have a tax law question, or questions regarding filling out my tax return, what can I do?**

- Refer to the SC1040 and schedule instructions

### **I didn't receive an acknowledgment email, why?**

Within 48 hours after you file your return using South Carolina Fillable Forms, we will send you an email letting you know that your return has been accepted or rejected. If you are not seeing this email in your inbox, please follow these steps:

- Make sure you are checking the same email account that you used to create an account with South Carolina Fillable Forms
- Check your spam filter. If the email is in your spam filter, add `customer_service@scfillableforms.com` to your e-mail safe senders list to ensure that you receive future emails. Each e-mail program and spam filter differs. Please check your e-mail account or service provider for additional help.
- If you still have not received the e-mail after this step, contact SC DOR at 803-896-1715.