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Signing Up

1. Visit [Cashapp.com/taxes](https://cashapp.com/taxes).
2. Make an account using your email and cell phone number, or sign in to your existing account if you have one.
3. Click "File Now"

Getting Started - Adding Your Personal Information

1. Answer these Yes/No Questions. They will determine your filing status and necessary state returns.

Step 1 of 3

Let's start by learning a little about you

Answer a few quick questions, and we'll get you all set up with the right forms.

Are you filing jointly with a spouse?

Yes

No

Do you have any dependents?

Yes

No

Did any of this apply to you in 2023?

- Worked and lived in different states
- Worked in multiple states
- Had foreign income over \$600

Yes

No

Continue

2. Check the boxes that contain the forms that you have.

Don't stress - checking the correct boxes will streamline the filing process, but will not negatively affect the return if you forget to check a box or check an extra box by accident.

Step 2 of 3

Next, let's talk about your work and income in 2023

Select any that applied to you. If you miss anything, you can add them later.

Occupation

Worked for someone else
Forms: W-2

Worked for myself
Forms: 1099-MISC, 1099-NEC, 1099-K, Schedule C or Schedule K-1

Was a student
Forms: 1098-T, 1098-E Paid tuition or student loans

Received retirement income
Forms: 1099-R, SSA-1099, RRB-1099

Investment income

Received interest income
Form: 1099-INT

Had gains or losses from investments sold
Forms: 1099-DIV, 1099-OID, 1099-B

Sold home or rented out property
Rental property and royalties count too

Any other income?

Received government payments
Form: 1099-G for unemployment benefits, prior year tax refund, etc.

Had other income
Farm income, property sale income, taxable scholarships, gambling winnings, cancellation of debt, etc.

Back

Continue

3. After completing the initial screener, you should be at the main menu. This is where you will be navigating through your return.
4. Click Start on the Basic Info section.

Welcome to your tax home

We've compiled everything you need to file this year. Once you finish the basics, you can complete them in any order — we'll save your place.

Info Income State

Info

Basic Info

Your household information

Start

Income

W-2

Finish Basic Info to Unlock

Savings & Interest

Finish Basic Info to Unlock

Investments

Finish Basic Info to Unlock

State

State Taxes

Finish Basic Info to Unlock

5. Complete your personal info and click Continue. Some information may already be populated based on the information in your CashApp account.
6. Click Continue.

We got a head start on your personal info

Double-check that your personal info is accurate

[Where'd you get all my info?](#)

Name

Riley

S

Smith

Suffix

Home Address

Address

Apt No.

San Diego

CA

92109

Phone number

(###) ###-####

Birthdate

Dec

DD

YYYY

Back

Continue

7. Confirm the information here is correct, and click Continue.

Tell us more about you

We don't know you well enough (yet) to auto-fill this stuff. Can you help us out?

Social Security Number

###-##-####

Filing status

Single

[What's my filing status?](#)

Do you have any dependents?

No

Occupation

Occupation

[Who can I claim as a dependent?](#)

Back

Continue

Next Steps - Adding Income

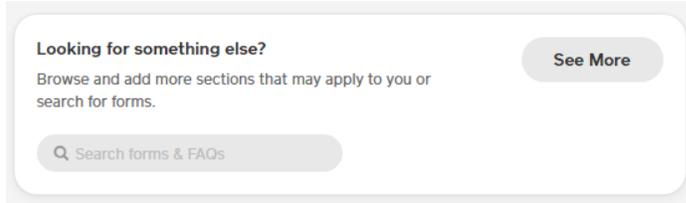
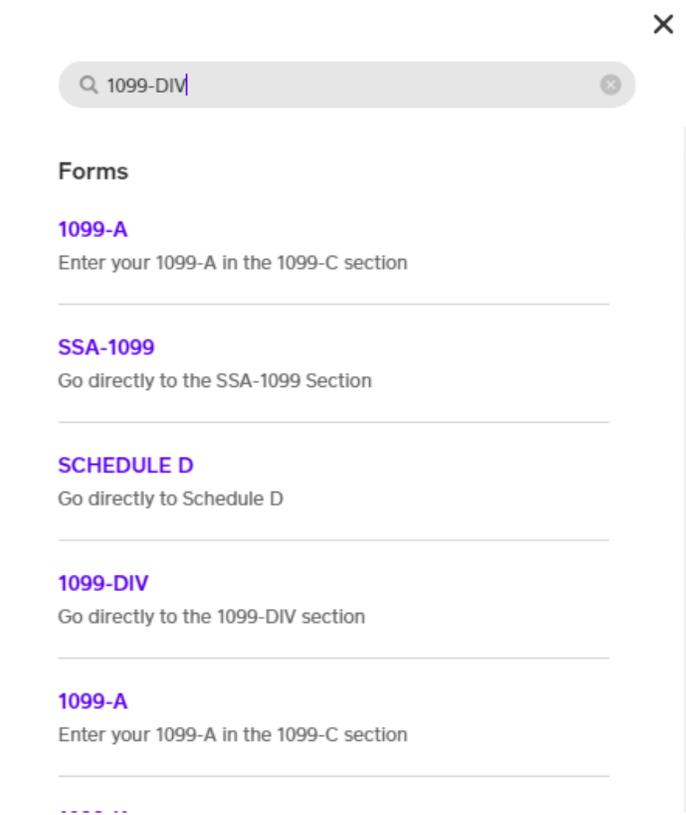
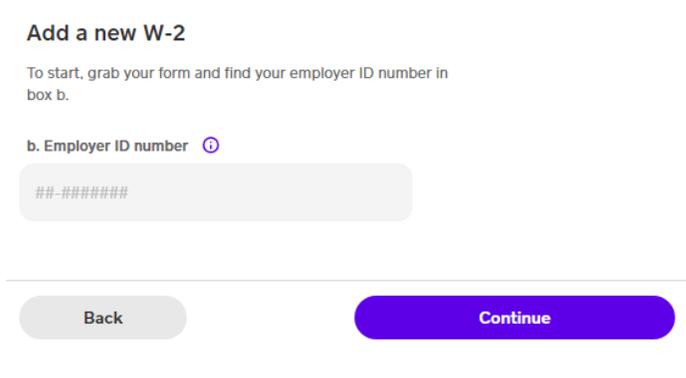
Next we will be adding income documents.

Use the buttons below to navigate to the form you need to enter.

- [W-2](#)
- [SSA-1099 \(Social Security Income\)](#)
- [1099-R](#)
- [Consolidated 1099](#)
- [1099-INT](#)
- [1099-DIV](#)
- [1099-MISC](#)
- [1099-NEC](#)
- [Schedule C - Self Employment](#)
- [Schedule D - Capital Gains and Losses \(Stocks/Cryptocurrency\)](#)
- [1098-T Scholarship Income](#)

Quick Tips for Entering Income:

- You can round dollar amounts to the nearest dollar if you use consistent rounding throughout the return.
- When entering names/addresses, match the information printed on each form wherever possible.
- Each box on a tax form is numbered. If you are ever unsure what information the software is asking for, check the box number.
- If a box on your tax form is blank - no information needs to be entered into the software.
- Don't rush - and double check for typos as you enter the information.

<p>Done entering income? Click here to go to Deductions</p>	
<p>Adding Forms to Your Return</p> <ul style="list-style-type: none"> ● Use the Search bar at the bottom of the home screen to look up forms by name. ● Click “See More” to choose forms from a list. 	
<ul style="list-style-type: none"> ● The steps for each form in this guide will start on the screen after selecting your form from the form finder tool. ● To use the tool, enter the form name into the search bar and select from the results. 	
<p>W-2</p> <ol style="list-style-type: none"> 1. Enter the Employer ID Number (EID) found in Box b. 2. Click Continue 	

3. Enter the rest of the employer information, matching the information in the corresponding boxes on your W-2.

What's on that form?

If something is blank on your W-2, that's OK! Just leave it blank here, too.

Whose form is this? ⓘ
This form belongs to me ▼

b. Employer identification number ⓘ
##-#####

c. Employer's name ⓘ
Employer

c. Employer's address ⓘ
Address

City
City

State
State ▼

Zip
Zip

4. Enter the dollar amount in each box according to the amounts in the matching boxes on your W-2.
5. If a box is blank on your W-2, leave it blank.

Boxes 1-11

1. Wages, tips, other compensation ⓘ \$ 0.00	2. Federal income tax withheld ⓘ \$ 0.00
3. Social security wages ⓘ \$ 0.00	4. Social security tax withheld ⓘ \$ 0.00
5. Medicare wages and tips ⓘ \$ 0.00	6. Medicare tax withheld ⓘ \$ 0.00
7. Social security tips ⓘ \$ 0.00	8. Allocated tips ⓘ \$ 0.00
9. Unused (this will be blank)	10. Dependent care benefits ⓘ \$ 0.00
11. Nonqualified plans ⓘ \$ 0.00	Total tip income not reported because it was <\$20 per month ⓘ \$ 0.00

6. If there are any values in Box 12, they will have a corresponding code. Select the correct code from the dropdown, and enter the dollar amount.
7. If there are multiple values in box 12, click the “Add Another Row” button.
8. If there is an X in one of the sections of Box 13 on your W-2, check the corresponding box in the software.
9. If there is anything in box 14, enter the code and dollar amount. The most common entry for California issued W-2s is CA SDI.

Anything in box 12?

12a. Amount

Code \$ 0.00

[+ Add Another Row](#)

Take a look at boxes 13 and 14

Only fill these out if they're filled out on your form.

13.

- Statutory employee
- Retirement Plan
- Third-party sick pay

14. Other

Description Amount

\$ 0.00

[+ Add Another Row](#)

10. Enter the information in the State section of the W-2, matching the values on the W-2.
11. If a box is blank on the W-2, leave it blank in the software.

Boxes 15-20

15. State Employer's state ID number

State ####

16. State wages, tips, etc. 17. State income tax

\$ 0.00 \$ 0.00

18. Local wages, tips, etc. 19. Local income tax

\$ 0.00 \$ 0.00

20. Locality name

Locality name

[+ Add Another Row](#)

<p>12. Click Save this W-2</p> <p>Back to Form Navigator</p>	<p>20. Locality name ⓘ</p> <p>Locality name</p> <p>+ Add Another Row</p> <p>Back Save this W-2</p>
<p>SSA-1099</p> <ol style="list-style-type: none">1. Enter the Social Security income reported in Box 52. Enter Federal Withholding3. Enter Medicare Premiums - this information will be shown below box 3.4. If Married filing Jointly, double check the name above each box in CashApp to ensure you're entering the correct info for both taxpayer and spouse. <p>Back to Form Navigator</p>	<p>Social Security Benefits</p> <p>Social Security Benefits Forms SSA-1099:</p> <p>Net benefits for 2023 (Box 5): ⓘ</p> <p>Riley</p> <p>\$ 0.00</p> <p>Federal tax withheld (Box 6):</p> <p>Riley</p> <p>\$ 0.00</p> <p>Medicare B premiums deducted from your benefit: ⓘ</p> <p>Riley</p> <p>\$ 0.00</p> <p>Medicare D premiums deducted from your benefit: ⓘ</p> <p>Riley</p> <p>\$ 0.00</p>
<p>Consolidated 1099</p> <ul style="list-style-type: none">• Consolidated 1099 forms are often issued by investment brokerages.• These documents generally	

<p>contain forms 1099-DIV, 1099-INT, 1099-B, and other investment information.</p> <ul style="list-style-type: none">• Each form is entered individually.• The payer’s information will apply to all 1099 forms in the document. <p>Back to Form Navigator</p>	
<p>1099-R</p> <ol style="list-style-type: none">1. Click “Add New Form 1099-R”	<p>Form 1099-R</p> <p>Click below to add a new or edit an existing 1099-R.</p> <p style="text-align: center;">+ Add New Form 1099-R</p>

2. Enter the Payer Information.

Income - Retirement Income

Please enter your 1099-R information below.

Payer Information

This form belongs to:

Riley



Payer's name:

Payer's name (continued):

Payer federal ID number (or TIN):

Payer's address:

Payer's city:

Payer's state:

California



3. Enter the information reported on the 1099-R
4. If Box 2b is empty, enter the information exactly as it appears on the 1099-R

Boxes 1 - 6

Box 1 - Gross distribution:

\$ 0.00

Box 2a - Taxable amount:

\$ 0.00

- Check this box if you rolled over the entire amount reported in box 2a (taxable amount) from a traditional IRA to a Roth IRA, or if you made nondeductible IRA contributions in a prior year. Don't check this box if you rolled over only part of the amount in box 2a. 

Box 2b:

Taxable amount not determined - Not supported

- Total distribution

Box 3 - Capital gain included in box 2a:

\$ 0.00

Box 4 - Federal income tax withheld:

\$ 0.00

Box 5 - Employee contributions:

\$ 0.00

Box 6 - Net unrealized appreciation:

\$ 0.00

<ol style="list-style-type: none"> If Box 2b has an X in it, the payer was unable to determine the taxable amount of the distribution. Scroll down and click Yes on the "Do you need to use the simplified method worksheet?" 	<p>Other 1099-R Information</p> <p>Were you under age 59 1/2 at the time of the distribution?</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Do you need to use the simplified method worksheet to calculate the taxable amount? ?</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>
<ol style="list-style-type: none"> Enter the distribution code in box 7. Complete any other relevant information. Click Continue <p>Back to Form Navigator</p>	<p>Box 7</p> <p>Box 7 - Distribution Codes: ?</p> <p>7-Normal distribution ▼</p> <p>▼</p> <p><input type="checkbox"/> IRA/SEP/SIMPLE ?</p>
<p>1099-INT</p> <ol style="list-style-type: none"> Search "1099-INT" in the form finder and click "Add New Interest Form". 	<p style="text-align: center;">+ Add New Interest Form</p> <p><small>Note: To enter interest income not reported to you on a 1099-INT, continue to the next page.</small></p>

2. Enter the Payer Name and ID number as it is written on the form.
3. Enter Account Number if applicable.
4. Tip: Click “Single-Page View” to display all boxes at once.
5. Click Continue.

[Back to Form Navigator](#)

Interest Income - Payer Information

Please enter the payer information from your Form 1099-INT below.

Payer name: 

Payer federal ID number (or TIN): 

Account number: (may be blank) 

Single-page view 



6. Enter the dollar amounts on the 1099 into the corresponding boxes.
7. It is normal for most of the boxes on a 1099-INT to be blank.
8. Click "Continue"

[Back to Form Navigator](#)

Interest Income - Form 1099-INT

Please enter your interest income information below.

Interest belongs to:

Riley

Box 1 - Interest amount:

\$ 0.00

Box 2 - Withdrawal penalty:

\$ 0.00

Box 3 - Interest on US savings bonds:

\$ 0.00

Box 4 - Federal tax withheld:

\$ 0.00

Box 5 - Investment expenses:

\$ 0.00

1099-DIV

1. Search 1099-DIV in the form finder.
2. Click Add New Dividend Income.

[+ Add New Dividend Income](#)

3. Enter the payer's information as it is reported on the form. If information is on a consolidated 1099, check the front page.

Income - Dividend

Please enter your dividend information below.

Payer & Recipient Information

Payer name:



Payer federal ID number (or TIN):



Account number: (may be blank)

Dividend belongs to:

Riley



4. Enter the Dividend income as it is reported on the form. It is normal for a large portion of these boxes to be blank.
5. Click Continue

[Back to Form Navigator](#)

Form 1099-DIV Boxes 1 - 6

Total ordinary dividends (Box 1a): 

\$ 0.00

Qualified dividends (Box 1b): 

\$ 0.00

Total capital gains (Box 2a): 

\$ 0.00

Unrecap. Sec. 1250 gain (Box 2b): 

\$ 0.00

Section 1202 gain (Box 2c): 

\$ 0.00

Collectibles (28%) gain (Box 2d): 

\$ 0.00

Nondividend dist. (Box 3): 

\$ 0.00

Federal income tax withheld (Box 4): 

\$ 0.00

1099-MISC

1. Click "Add New 1099-MISC"

Form 1099-Misc

Click below to add a new or edit an existing 1099-MISC.

[+ Add New Form 1099-MISC](#)

2. Enter Payer Information

Form 1099-MISC

This form belongs to:

Riley



Payer federal ID number (or TIN):



Payer name:

Payer address:

Payer city:

Payer state:

California



Payer zip code:

3. Enter your income into the form, checking the box if necessary.
4. If you leave the box unchecked, hitting continue will finish the form.
5. If you check the box, the software will display boxes 1-17.
6. Click Continue

[Back to Form Navigator](#)

Form 1099-MISC info

Other income (Box 3): 

\$ 0.00

Federal tax withheld (Box 4): 

\$ 0.00

My form has other values in Boxes 1-17.

Rents (Box 1): 

\$ 0.00

Royalties (Box 2): 

\$ 0.00

Fishing boat proceeds (Box 5): 

\$ 0.00

1099-NEC

1. Click "Add new 1099-NEC"

Form 1099-NEC

Click below to add a new or edit an existing 1099-NEC.

[+ Add New Form 1099-NEC](#)

2. Enter Payer Information

Form 1099-NEC

Please enter your 1099-NEC information below.

This form belongs to:

Riley



Payer federal ID number (or TIN) shown on your form:



Payer name:

Payer address:

Payer city:

Payer state:

California



Payer zip code:

3. Enter the information from your 1099 into the software.
4. Check the box if necessary.

[Back to Form Navigator](#)

Form 1099-NEC - info

Enter the values from your 1099-NEC below

Nonemployee compensation (Box 1):

\$ 0.00

Payer made direct sales totaling \$5,000 or more of consumer products to a recipient for resale (Box 2):

Federal income tax withheld (Box 4):

\$ 0.00

My form has other values in Boxes 5-7.

State 1

State tax withheld:

\$ 0.00

State:



Payer's state no.:



State Income:



\$ 0.00

Schedule C - Self Employment

Note:

For those with multiple businesses, each business requires its own Schedule C.

1. Click "Add New Schedule C"

Business Income

Add and edit your personal businesses below.

[+ Add New Schedule C](#)

2. Enter your Business Information

New Business - General Information

Please enter the following information about the business below.

This business belongs to:

Riley



Business name: 

Employer ID: (leave blank if SSN)

Check here if your business address is the same as your personal address:

Business address: 

Business city: 

Business state: 

California



Business zip code: 

3. Choose the most accurate description of your business from the dropdown.

Business Income - Type of Business

Please enter the following information about the business below.

Principal business or profession: 

Business description: 

4. Check "Yes" if you have entered any 1099-NEC or 1099-MISC forms related to this business.

Business Income - 1099 Information

Please enter the following information about the business below.

Form 1099s

Did you make any payments in 2023 that would require you to file Form(s) 1099?

Yes

No

If 'Yes', did you or will you file all required Forms 1099?

Yes

No

Prior Year Losses

Do you have any losses from prior years which you were not allowed to deduct due to the application of the passive activity loss rules? 

\$ 0.00

5. Answer the following Yes/No questions.
6. Click the  symbol for help determining the answers to the first two questions.
7. Enter your accounting method, and choose your inventory valuation method if relevant.

Business Income - Questions

Please enter the following information about the business below.

Did you materially participate? 

Yes

No

Is all of your investment in the business at risk?
(Yes for most people) 

Yes

No

Did you start or acquire this business in 2023?

Yes

No

Do you need to enter information about your inventory for this business?

Yes

No

Accounting method:

Cash

Accrual

Method(s) used to value closing inventory: 

Cost

Lower of Cost or Market

8. Now you will be at the Business Income menu.
9. Click "Start" next to Income

Business Income

Please enter the following information about the business below.

Sections

Income

Start

Expenses

Start

Qualified Business Income (QBI) info

Start

Business use of home (home office)

Start

Vehicle expenses

Start

Health insurance deduction

Start

Depreciation

Start

10. Any business income reported on your previously entered forms will be carried over. It's recommended to enter all your other income before this step.
11. Enter any additional business income from your bookkeeping.
Click the  symbol for more information on each type of income, and enter your income in the most applicable box.
12. Click Continue

Business Income - Income

Please enter the following information about the business below.

Income From 1099-MISC:

\$0

Income From 1099-NEC:

\$0

Income From 1099-K:

\$0

Note: If you need to add 1099-MISCs, 1099-NECs, or 1099-Ks for this business, make sure that you select this business as the "Business that generated income" in the 1099-MISC/1099-NEC/1099-K area of the site when entering them.

Income From Statutory Employee W-2s: 

\$0

Gross receipts or sales: (Do not include merchant and third party payments) 

\$ 0.00

Returns and allowances: 

\$ 0.00

Other income: 

\$ 0.00

- 13. If you have business inventory enter its information here.
- 14. Click Continue

Business Income - Cost of Goods Sold

Please enter the following information about your business cost of goods sold below. Unless your business is involved in manufacturing, you can leave this section blank.

Inventory at beginning of year: 

\$ 0.00

Purchases less cost of items withdrawn for personal use: 

\$ 0.00

Cost of labor: 

\$ 0.00

Materials and supplies: 

\$ 0.00

Other costs: 

\$ 0.00

Inventory at end of year: 

\$ 0.00

15. Click "Start" on Expenses

Business Income

Please enter the following information about the business below.

Sections

Income

\$ 0.00

Edit/Review



Expenses

Start

Qualified Business Income (QBI) info

Start

Business use of home (home office)

Start

Vehicle expenses

Start

Health insurance deduction

Start

Depreciation

Start

- 16. Enter your business expenses in the relevant boxes.
- 17. Click Continue

Business Income - Expenses

Please enter the following information about the business below.

Advertising: ⓘ

\$ 0.00

Commissions and fees: ⓘ

\$ 0.00

Contract labor: ⓘ

\$ 0.00

Depletion: ⓘ

\$ 0.00

Employee benefit programs: ⓘ

\$ 0.00

- 18. Continue adding expenses.
- 19. Click Continue

Business Income - Expenses

Please enter the following information about the business below.

Insurance (other than health):



\$ 0.00

Mortgage interest:



\$ 0.00

Other interest:



\$ 0.00

Legal and professional services:



\$ 0.00

Office expenses:



\$ 0.00

- 20. Continue adding expenses.
- 21. Click Continue.

Business Income - Expenses

Please enter the following information about the business below.

Pension and profit-sharing plans: 

\$ 0.00

Rent or lease (vehicle, machinery, equipment): 

\$ 0.00

Rent or lease (other business property): 

\$ 0.00

Repairs and maintenance: 

\$ 0.00

Supplies: 

\$ 0.00

- 20. Continue adding expenses.
- 21. Click Continue.

Business Income - Expenses

Please enter the following information about the business below.

Taxes and licenses: 

\$ 0.00

Travel expenses: 

\$ 0.00

Meals and entertainment expenses: 

\$ 0.00

Utilities: 

\$ 0.00

Wages (less employment credits): 

\$ 0.00

- 22. Finish adding any additional expenses.
- 23. Do not use this to enter asset depreciation or mileage.
- 24. Click Continue.

Business Income - Other Expenses

Please enter the following information about your business below.

OTHER EXPENSE

Description

Amount

\$ 0.00

Add New Expense

25. Click Start on QBI info.

Business Income

Please enter the following information about the business below.

Sections

Income

\$ 0.00

Edit/Review



Expenses

\$ 0.00

Edit/Review



Qualified Business Income (QBI) info

Start

Business use of home (home office)

Start

Vehicle expenses

Start

Health insurance deduction

Start

Depreciation

Start

Back

Continue

26. Enter the following information if applicable to your business.

Business Income - Qualified Business Income (QBI) deduction questions

Section 199A W-2 wages paid: 

\$ 0.00

Section 199A unadjusted basis of all qualified property: 

\$ 0.00

Specified service business: 

Yes

No

27. If you use a home office, click Start on Business use of Home

Business Income

Please enter the following information about the business below.

Sections

Income

\$ 0.00

Edit/Review



Expenses

\$ 0.00

Edit/Review



Qualified Business Income (QBI) info

Edit/Review



Business use of home (home office)

Start

Vehicle expenses

Start

Health insurance deduction

Start

Depreciation

Start

28. Choose between Simple Method and Detailed Method.
29. Simple Method will only display the most common home use deductions, while Detailed Method will display all possible deductions.

Business Income - Business Home Use Choice

Please select the type of method you would like to use to claim business expenses for your home. If you're not sure we recommend using the simple method.

Use Simple Method

Use Detailed Method

Back

30. For most businesses the Simple Method will cover the needed information.
31. Enter an estimate of the square footage of your home office (the amount of space you use for work), and the total square footage of your home.
32. Enter your Business Income and Expenses.
33. Click Continue

Daycare

Home used for daycare? ⓘ

Yes

No

Part of Your Home Used for Business

Area regularly and exclusively used for business: ⓘ

0

Total area of home: ⓘ

0

Gain or Loss

Tentative profit (loss) from Schedule C, line 29:

\$0

Income from business use of your home (so far it looks like \$0)

\$ 0.00

Expenses from business use of your home entered as a positive number (so far it looks like \$0)

\$ 0.00

Most people record the full amounts of their income and expenses here.

34. Click Start on Vehicle Expenses

Vehicle expenses

Start

35. Enter the Year, Make, and Model under vehicle description. (e.g. 2016 Ford F150)
36. Enter date placed in service (approximate or exact date of when you started using the vehicle for business purposes).
37. Click Continue

Business Income - Vehicle Description

Please enter a description of the asset, the date that it was first used for Business Income.

Vehicle description: ⓘ

Date placed in service: ⓘ

Back

Continue

38. Enter the number of business miles driven.
39. Business mileage is mileage driven from your office to a work location.

Business Income - Vehicle Miles Driven

Please enter in information about the number of miles driven by this vehicle.

Business miles driven during 2023: ⓘ

0

Average commuting miles: ⓘ

0

Other personal miles: ⓘ

0

The standard mileage rate for business miles driven is:
65.5 cents per mile.

40. Choose between Standard Mileage Rate or Actual Expenses. If you have fewer than 5 business vehicles, it's recommended to use the Standard Mileage Rate.

Business Income - Standard Mileage Rate or Actual Expenses

You can deduct the actual expenses of your vehicle, or take the standard mileage rate. You must use actual expenses if you used five or more vehicles simultaneously in your business. You can use the standard mileage rate if you owned the vehicle and used the standard mileage rate for the first year you placed the vehicle in service or if you leased the vehicle and are using the standard mileage rate for the entire lease period (except the period, if any, before 1998).

Use Standard Mileage Rate

Use Actual Expenses

Back

41. Answer the following questions.
42. If you use your business vehicle for personal use, it will not negatively affect your tax return.
43. In an audit, the IRS may ask for a log of business mileage if you use your personal vehicle for business.
44. Click Continue

Business Income - Vehicle Questions

Please answer the following questions about this vehicle.

Was there another vehicle available for personal use? 

Yes

No

Was the vehicle available for personal use during off-duty hours? 

Yes

No

Do you have evidence to support your deduction? 

Yes

No

If Yes, is that evidence written? 

Yes

No

45. By using the standard rate, you will not be required to enter Depreciation for your vehicle.
46. Click Continue, then click Continue again.

Business Income - No Depreciation

The election to utilize the standard mileage rate for reporting your expenses for car 1 means that it will not be necessary to compute depreciation. If you used more than four vehicles for your business at the same time, you would be required to use the actual expense method.

Back

Continue

47. Click Start on Health Insurance Deduction

Health insurance deduction

Start

48. Enter here the total amount of medical and dental insurance premiums you paid for yourself, your spouse (if married) and dependents. If you purchased health insurance through the Healthcare Marketplace (Covered CA in California) and received an Advanced Premium Tax Credit, you'll need to reduce the total premium paid by the amount of this credit received.
49. Click Continue

Business Income - Health Insurance

Please enter insurance information for your business below. If you qualify for a Self-Employed Health Insurance Deduction, you will see a value on Schedule 1, Line 17.

Enter the amount paid in 2023 to provide health insurance for you, your spouse, and your dependents established under this business: 

\$ 0.00

Long-Term Care Payment

If you made payments for coverage under a qualified long-term care insurance plan, enter below total payments made for each person during 2023 and enter the age of the person.

Total long-term care insurance payments made in 2023 for first person:

\$ 0.00

Age of first person:

1

Total long-term care insurance payments made in 2023 for second person:

\$ 0.00

Age of second person:

1

50. Click Start on Depreciation

Depreciation

Start

51. A depreciating asset is an item used for business purposes that retains its value over time (computers, other expensive equipment, etc.).
52. Instead of deducting the entire cost of the asset as a business expense, deduct the amount of value lost over time as depreciation. (e.g. A laptop originally cost \$1000. After 1 year of business use, the laptop could be sold for \$700. Therefore, \$300 will be claimed as depreciation.)
53. Click Add New Depreciation Asset

Depreciation

Click below to add a new or edit an existing depreciation asset. If you're not claiming depreciation expenses, you can proceed to the next page. We don't currently support entry of Section 179 carryovers from prior years.

[+ Add New Depreciation Asset](#)

54. Enter the information for your asset.

55. If you are unsure of what to enter in a field, click the .

56. Click Continue

Depreciation

Please enter information about your depreciated asset.

Asset description: 

Asset classification: 

3 Year Property 

Date asset placed in service: 

Cost of asset: 

\$ 0.00

Depreciation method: 

MACRS 200% Declining Balance 

Percentage of business use:

100% 

Section 179 deduction: 

\$ 0.00

Accumulated depreciation:

\$ 0.00

Back

Continue

- 57. Enter the following information.
(Disposal includes sale of asset).
- 58. Click Continue

Depreciation

Date asset was disposed of (leave blank if asset was not disposed of in 2023):

Is this a mid-quarter property? i

Yes

No

Is this asset a listed property? i

Yes

No

Is this asset a vehicle?

Yes

No

59. All Schedule C fields should be complete.
60. Click Continue

[Back to Form Navigator](#)

Business Income

Please enter the following information about the business below.

Sections

Income

\$ 0.00

Edit/Review



Expenses

\$ 0.00

Edit/Review



Qualified Business Income (QBI) info

Edit/Review



Business use of home (home office)

\$ 0.00

Edit/Review



Vehicle expenses

\$ 0.00

Edit/Review



Health insurance deduction

Edit/Review



Depreciation

\$ 0.00

Edit/Review



Schedule D - Capital Gains and Losses

1. Click "Add Sales" (Will say Add more if some sales have already been entered)

+ Add more sales

Back

Continue

2. Choose Entry method
3. Most brokerages will issue form 1099-B, which includes a list of sales.
4. Check your 1099-B for a message clarifying if the information was also reported to the IRS by the brokerage.
5. If the information was reported (most common, but not guaranteed), choose Summarized entry.

Tell us about your investment sale.

Summarized entry is the best option if you have to enter a lot of individual sales.

- One sale at a time
- Summarized entry ⓘ
- Spreadsheet entry

Back

6. For a Summarized Entry, use the brokerage name and specify if it is a long-term or short-term sale in the description.
7. Enter your proceeds (box 1d of 1099-B)
8. Enter your cost basis (box 1e of 1099-B)
9. Choose the Sale Category (for summarized entries, this is generally either Long Term covered or Short Term covered.
10. Check the box if any adjustments (such as Wash sales) are necessary.
11. Click Continue

Tell us about your investment sale.

Summarized entry is the best option if you have to enter a lot of individual sales.

- One sale at a time
- Summarized entry ⓘ
- Spreadsheet entry

Description: ⓘ

[Brokerage Name] Long Term Sales

Proceeds:

0.00

Cost:

0.00

Sale category:

Box D - Long Term covered ▼

I need to enter adjustments for this sale

Adjustment code:



Adjustment amount:

\$ 0.00

If reporting individual sales because information was not tendered to IRS (common for cryptocurrency transactions):

- Use the Ticker symbol of the stock or crypto for the Description.
- Enter date acquired, or select Various if asset was purchased across multiple dates.
- Enter Date Sold.
- Trading one Cryptocurrency for another counts as a sale, and must be reported as a transaction.
- If you purchased cryptocurrency using another form of cryptocurrency, enter the cost basis as the USD value of the currency at time of purchase.

[Back to Form Navigator](#)

Tell us about your investment sale.

Summarized entry is the best option if you have to enter a lot of individual sales.

- One sale at a time
 Summarized entry ⓘ
 Spreadsheet entry

Description: ⓘ

Date acquired: ⓘ

VARIOUS

Date sold: ⓘ

Proceeds:

Cost:

Sale category:

I need to enter adjustments for this sale

Adjustment code:

Adjustment amount:

Back

Continue

Taxable Scholarship Income

1. Check Box 5 of your 1098-T for total scholarship income.
2. Scholarship income is only taxable if it exceeds the amount of qualified education expenses, including tuition.
3. Subtract education expenses from scholarship. If greater than 0, enter final amount here.

Taxable scholarships received

Please enter the amount of taxable scholarships you received.

Taxable Scholarships Received: ⓘ

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Continue

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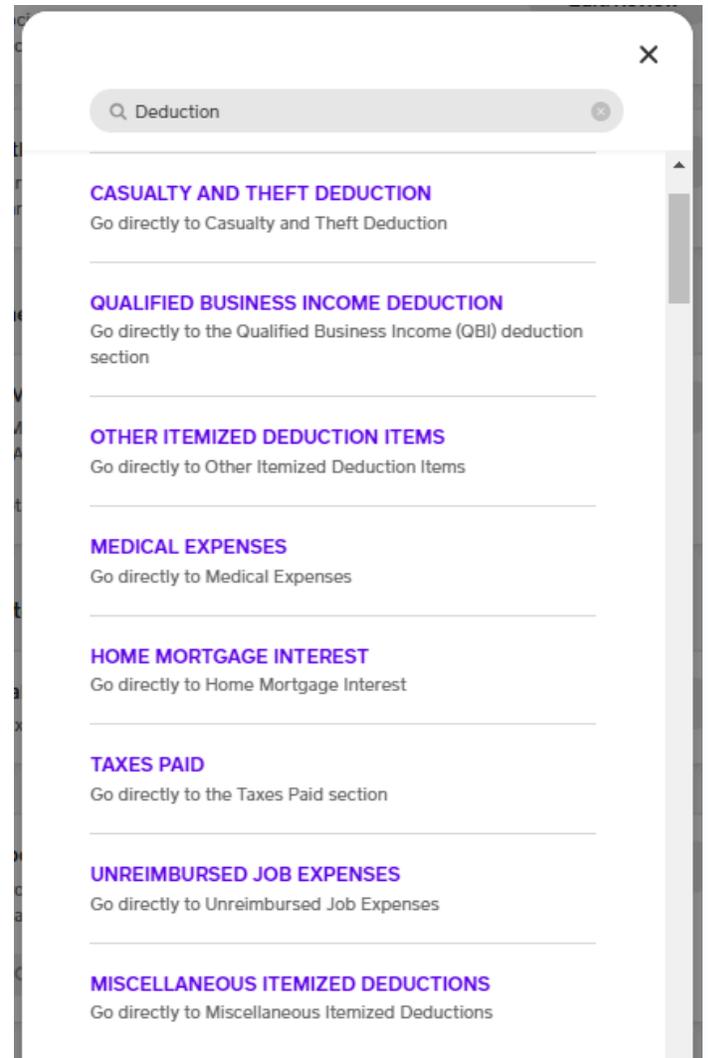
Itemized Deductions

Standard vs Itemized Deductions

- Most filers will find the Standard Deduction more beneficial than Itemized Deductions.
- CashApp will automatically check for possible deductions based on your answers to the initial screener.
- Check our [Tax Prep Checklist](#) for a list of some common itemized deductions.

Adding Deductions

- If there are any deductions that you may qualify for based on the information entered when starting your return, CashApp will add the deduction to your home screen.
- Use the form search tool to add any other itemized deductions to your return.



California Tax Filing

1. Click Start on your State Return

State

California State Taxes
Let's start your state taxes.

Start

<p>2. Confirm your state and click Continue</p>	<p>What state did you live and work in during 2023?</p> <p>California </p> <p><input type="checkbox"/> I lived or worked in more than one state during 2023 </p> <p>Back Continue</p>
<p>3. Confirm your County and click Continue</p>	<p>Which county do you currently live in?</p> <p>This should be the county you currently reside in at the time of filing.</p> <p>San Diego </p> <p>Back Continue</p>
<p>4. Check yes if you made estimated tax payments. This does not include tax withholding.</p>	<p>Did you make any estimated payments for California?</p> <p>Yes</p> <p>No</p> <p>These can include quarterly-estimated payments, payments made with a filing extension, and refund amounts applied from previous years.</p> <p>Taxes you paid from your paycheck or that were reported to you on 1099 forms don't count as estimated payments.</p> <p>Back</p>

5. Confirm your Address

California address verification

Is the address shown below the same as your current physical residence address?



Yes

No

Back

6. Choose between Standard or Itemized CA deduction. [Click Here for information on CA Standard Deduction.](#)
7. Enter Use Tax if applicable.

California General Information

Do you want to take the Standard or Itemized deduction on your California return?

Standard

Itemized

Do you want information on no-cost or low-cost health care coverage? ⓘ

Yes

No

Use Tax on Out-of-State Purchases

Out of state purchases you didn't pay California sales/use tax on: ⓘ

\$ 0.00

Applicable sales or use tax rate: (e.g. 0.07 for 7%) ⓘ

0

Estimated sales/use tax due for purchases under \$1,000 (don't estimate use tax on items you've already entered above): ⓘ

\$ 0.00

California sales or use tax you've already paid to another state on out of state purchases:

\$ 0.00

Back

Continue

8. State whether your household had health coverage for the entirety of 2023.
9. If no, you may be charged a penalty by CA.

California - Health insurance coverage

Starting January 1, 2020, the **California individual healthcare mandate** requires all California residents to either:

- Have qualifying California minimum essential insurance coverage, or
- Get an **exemption** from coverage from the California state healthcare marketplace by visiting **Covered California**, or
- Pay an individual shared responsibility penalty on your California income tax return.

If you or any of your family members had a Marketplace catastrophic health plan or separate dental policy you're not allowed to take the CA premium assistance subsidy for this coverage even if you received Form 3895 as evidence of that coverage. Any health plan that doesn't meet California's minimum essential coverage (MEC) requirements doesn't qualify as coverage.

Did all members of your applicable household, including yourself, have at least minimum essential health coverage for every month in 2023? 

Yes

No

NOTE:

It's strongly recommended that you verify all health care information entered before submitting your 2023 California income tax return. If the California health care information you provide can't be accurately reconciled by CA FTB you could receive an adjustment notice.

10. If you select no, you will come to this screen. Click the 3 dots, and click edit.

California healthcare - Coverage and exemption information

Select which months each person below had minimum essential health coverage or had an exemption for coverage. To find out if you qualify for an exemption, you can visit this [page](#). You're considered to have minimum essential coverage for the entire month as long as you're enrolled in and entitled to receive benefits under a qualifying plan or program for at least one day during that month. If you need to remove anyone listed below you'll need to return to the previous screen.

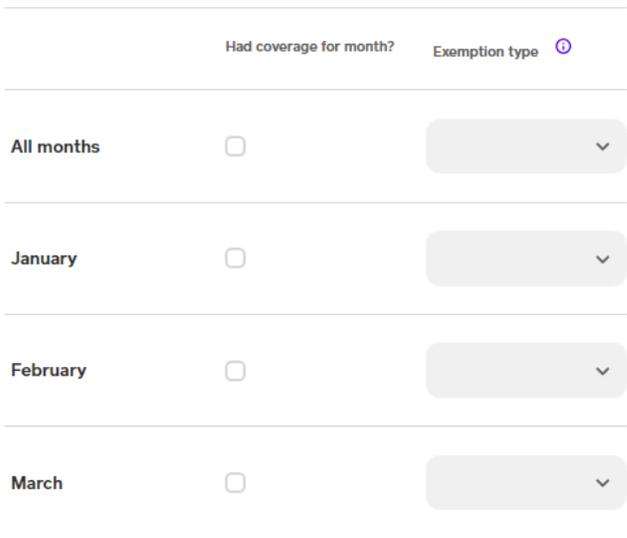
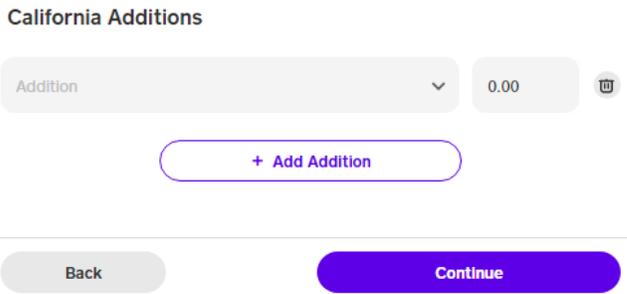
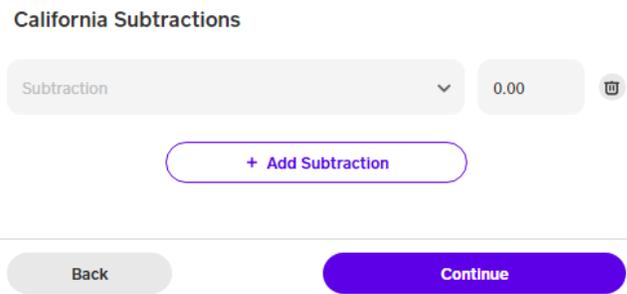
HEALTHCARE INFO FOR RILEY S SMITH

No coverage & no exemptions
Coverage

 EDIT

Back

Continue

<p>11. Check the boxes where you had coverage, and choose an exemption reason on the months you did not.</p> <p>12. Click Continue</p>	
<p>10. Add any additional income that is not reported on the Federal return.</p>	
<p>11. Add an income adjustment here if some of the reported income is not taxed by CA.</p>	

12. Click Yes to see if you qualify for the Renter's Credit, or click no to skip.

California - Nonrefundable Renter's Credit

Do you want to answer some additional questions to see if you can take this credit?

Yes

No

If you were a full year California resident, paid rent in California and your AGI is under a certain limit, you may be eligible for the Nonrefundable Renter's Credit.

Back

13. Click Yes if you need to enter an AMT adjustment, otherwise click No.

California AMT Question

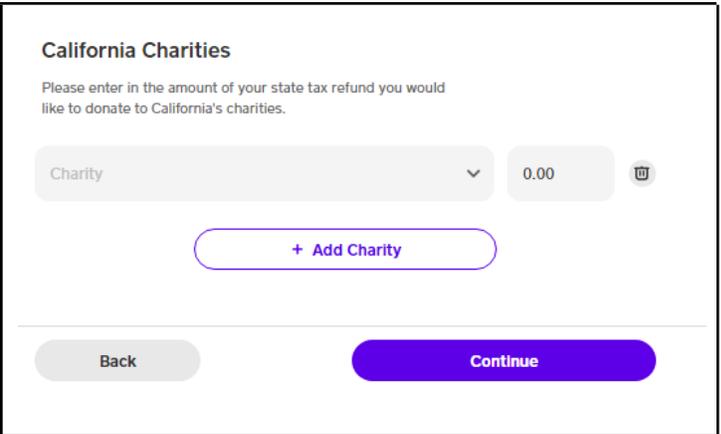
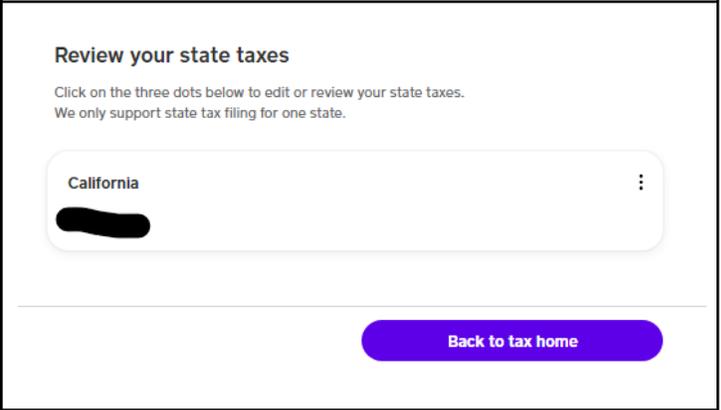
Do you need to enter any California Alternative Minimum Tax (AMT) adjustments? (This isn't common.)

Yes

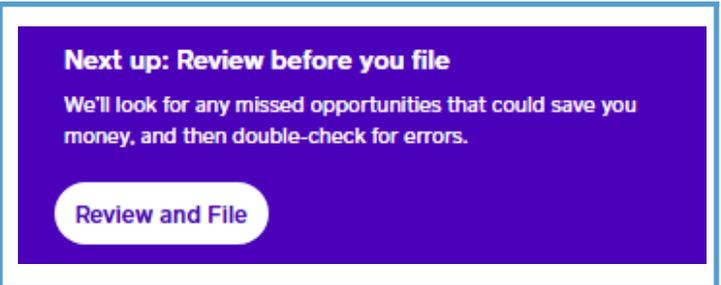
No

California AMT differs from the federal AMT calculation, so you may have adjusting entries you need to enter.

Back

<p>14. Enter an amount here if you would like to donate a portion of your State refund to charity. This is NOT a place to add charitable donation deductions.</p>	
<p>15. Click Back to Home</p>	

E-Filing

<p>1. Click "Review and File" at the bottom of the screen.</p>	
--	--

2. Click “Get Ready to E-File”

Tip: Click the “Download your tax forms here” button to download a PDF of your return.



Your federal return is good to go

We'll use the standard deduction on your federal return because it looks like it'll save you the most on your taxes. Now your federal return looks ready for the IRS.

Get Ready to E-file

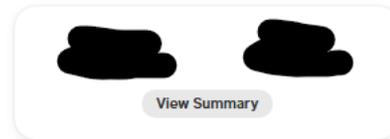
Back

Rather mail in the returns yourself?

Download your tax forms [here](#)

3. Click “View Summary” to double check the information on your return.
4. Click Continue

SUMMARY ID CHECK PAYMENT FILE

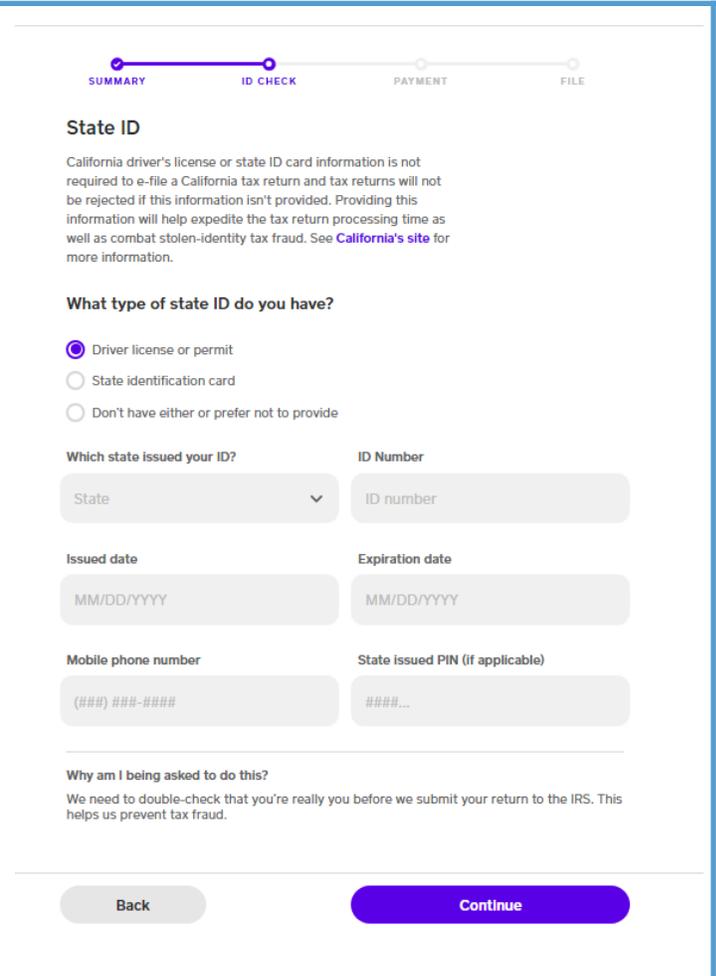


- ✓ Free Audit Defense
- ✓ No hidden filing fees
- ✓ Accurate Calculations Guarantee
- ✓ Max Refund Guarantee

Back

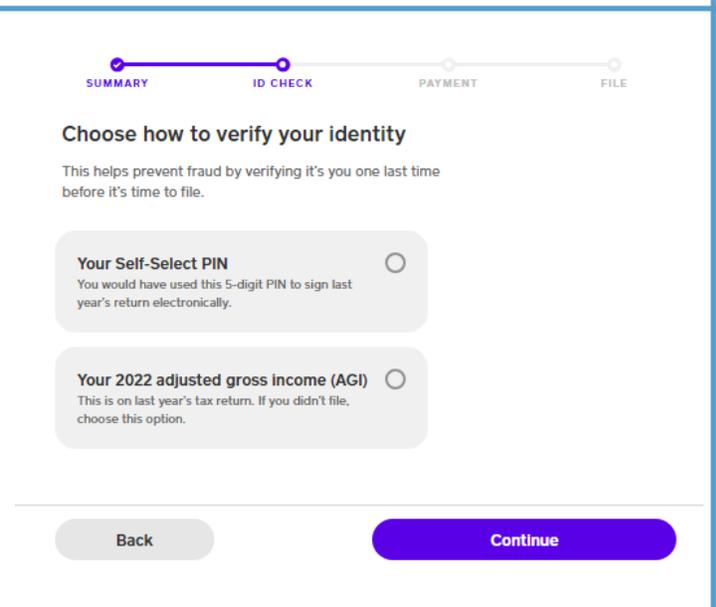
Continue

5. Enter your ID information
6. On CA IDs, the Issue Date is in the bottom right corner under the letters ISS.



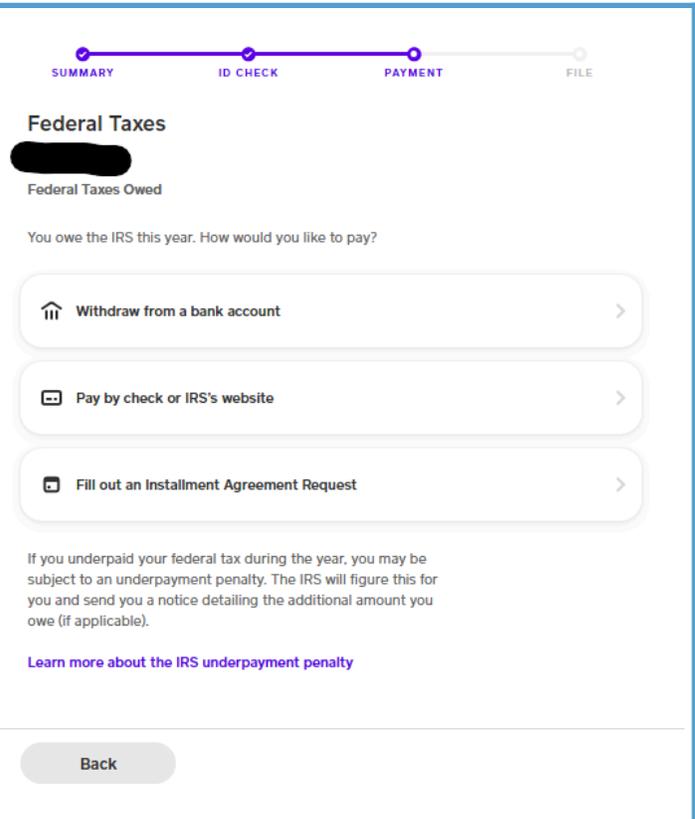
The screenshot shows the 'State ID' verification step in the filing process. At the top, a progress bar indicates the current step is 'ID CHECK', with 'SUMMARY', 'PAYMENT', and 'FILE' as previous and subsequent steps. The main heading is 'State ID'. Below this, a paragraph explains that California driver's license or state ID card information is required for e-filing and that providing it helps expedite processing and combat tax fraud. The question 'What type of state ID do you have?' is followed by three radio button options: 'Driver license or permit' (selected), 'State identification card', and 'Don't have either or prefer not to provide'. Below this, there are two columns of input fields: 'Which state issued your ID?' (a dropdown menu) and 'ID Number' (a text field). The next row has 'Issued date' (MM/DD/YYYY) and 'Expiration date' (MM/DD/YYYY). The final row has 'Mobile phone number' ((###) ###-####) and 'State issued PIN (if applicable)' (####...). A section titled 'Why am I being asked to do this?' explains the need to verify identity to prevent tax fraud. At the bottom, there are 'Back' and 'Continue' buttons.

7. Choose Identity Verification Method.
8. AGI is listed on Line 11 of Form 1040
9. Your Self-Select PIN is a 5 digit PIN submitted with your tax return. If you cannot remember your PIN, choose your past year's AGI as the verification method.



The screenshot shows the 'Choose how to verify your identity' step in the filing process. At the top, a progress bar indicates the current step is 'ID CHECK', with 'SUMMARY', 'PAYMENT', and 'FILE' as previous and subsequent steps. The main heading is 'Choose how to verify your identity'. Below this, a paragraph explains that this step helps prevent fraud by verifying identity one last time before filing. There are two radio button options: 'Your Self-Select PIN' (with a subtext: 'You would have used this 5-digit PIN to sign last year's return electronically.') and 'Your 2022 adjusted gross income (AGI)' (with a subtext: 'This is on last year's tax return. If you didn't file, choose this option.'). At the bottom, there are 'Back' and 'Continue' buttons.

10. Choose how you will pay tax owed, or how you will receive your refund. This is where you can set up Direct Deposit or Direct Debit.
11. You can find your Account and Routing number printed at the bottom of your paper checks.
12. If you do not have a paper check, you may be able to get the Account and Routing numbers using your online banking account or mobile app, or by calling your bank.



13. Click Continue to E-File your return.

