

THE FEDERAL EMPLOYEE/RETIREE DELINQUENCY INITIATIVE (FERDI)



Filing Season Online – Tools, Tips, and Information

In our continued effort to promote tax compliance within the federal workforce, the IRS FERDI team is providing valuable filing season information. You can share the resources and information shown below with your employees as they begin to prepare and file their tax return, or to resolve other tax issues. Year-round tax preparation is for everyone. Remind your employees they need to think about taxes during the year and not just when they file their tax return. What they do during the year may affect the amount of tax they could owe or refund they may expect next year.

The Standards of Ethical Conduct of the Executive Branch requires federal employees to file and pay their federal, state, and local income taxes accurately and on time, whether they owe additional tax or expect to receive a refund.

Tax Filing Season

Federal employers play a vital role in helping employees understand their income tax responsibilities. Empower your employees to comply with tax laws by educating and reminding them of their tax obligations.

Take Steps to Educate Your Employees

- Include tax compliance information in new employee orientation and pre-retirement seminars.
- Incorporate and deliver tax compliance messages to employees throughout the year.
- Share available resources to help educate your workforce on tax compliance, especially during the filing season.

Share Ways to Stay Tax Compliant

As public servants, federal employees have an ethical duty to remain compliant. All federal employees must:

- Accurately report tax liability by disclosing all income.
- File tax returns on time, whether additional tax is owed, or a refund is anticipated.
- Timely pay tax liabilities in full.

File Electronically and Use Direct Deposit for Refunds

It's more important than ever to ensure returns are accurately filed. Avoid processing and refund delays by filing electronically and using direct deposit whenever possible.

- If a return includes errors or is incomplete, it may require further review, which may slow the tax return processing and refund issuance.
- Refund status updates are available within 24 hours after the IRS accepts an e-filed tax return and up to four weeks after a paper return is mailed.

IRS Free File

- The IRS's [Free File Program](#) allows individuals who made \$89,000 or less to file taxes electronically for free using Free File guided tax software.
- Members of the military and qualifying veterans can use [MilTax](#), a Department of Defense program to file for free, in some instances.

Planning to Retire?

Federal retirees are still required to file their federal, state and local taxes on time even if they are expecting a refund. Older adults have special tax situations and benefits. Visit the [Tax Information for Seniors & Retirees](#) page on [IRS.gov](#) to get general information about how to file and pay taxes, including many free services.

You can also refer to [Publication 4190](#), Tax Guide for the Retiree or [Publication 721](#), Tax guide to U.S. Civil Service Benefits for additional information.

Choosing a Preparer

IRS.gov has several options for finding a tax preparer.

Reminder: Taxpayers, not the tax preparer, are responsible for information on the tax return once it is signed.

- The IRS provides an online database to help locate [authorized e-file providers](#) who can electronically file tax returns.
- [Choosing a Tax Professional](#) provides information for selecting a professional tax preparer.
- The [Directory of Federal Tax Return Preparers with Credentials and Select Qualifications](#) can help find preparers in specific areas who currently hold professional credentials recognized by the IRS.

Online Resources

[Additional help](#) is available at IRS.gov or in [Publication 17](#), Your Federal Income Tax (For Individuals).

The [IRS Services Guide](#) lists resources for individuals and tax professionals.

[Frequently Asked Questions \(FAQs\)](#) provides answers to most commonly asked questions. Get the latest information and all articles within this flyer at [IRS Newsroom](#). Access news releases, IRS topics that are currently in the news and IRS tax tips, all in one place.

IRS on Social Media

Follow the [IRS's official social media accounts](#) and [email subscription lists](#) to stay current on the latest tax topics and alerts.

For the latest updates on tax changes, scam alerts, initiatives, products, and services you can:

- Download the [IRS2Go mobile app](#),
- Watch [IRS YouTube videos](#), or
- Follow the IRS on [Facebook](#), [LinkedIn](#), [Instagram](#), and [X \(Formerly Twitter\)](#)

Tax Season Alerts and Planning Ahead

Employees can get critical updates that may affect their upcoming tax filing and keep up-to-date on recent IRS news on this [special alerts page](#). Newer updates will be placed at the top of this page; the IRS will also provide critical updates through social media.

Still Need to File a Return?

No need to wait, file electronically when you're ready. If you haven't filed your federal income tax return for this year or for previous years, you should file your return as soon as possible regardless of your reason for not filing. We have tools and resources available, such as the [Interactive Tax Assistant \(ITA\)](#) and [FAQs](#).

There's no penalty for failure to file if you're due a refund. However, you risk losing a refund altogether if you file a return or otherwise claim a refund after the statute of limitations has expired. An original return claiming a refund must be filed within 3 years of its due date for a refund to be allowed in most instances.

Bookmark IRS.gov resources & online tools

Make your first stop [IRS.gov](#) where you'll find [online tools to help you get the information you need](#). You can utilize these online resources to help file and pay taxes, find information about your account, and get answers to tax questions.

Some key resources available are:

Online Account

Create and use an [online account](#) to securely view important information needed to file your tax returns.

- Check outstanding balances.
- Set up an [Online Payment Agreement](#).
- Manage communication preferences to go paperless for certain IRS notices, or to receive email notification when the IRS sends a new digital notice.

Online Tax Assistance



Start a conversation

Chat Bots were previously launched on the IRS.gov [Payments](#) and [Additional Information on Payment Plans](#) web pages. The bots provide self-help options to make one-time payments,

answer frequently asked questions, and provide notice clarification, with an option to escalate to a live Automated Collection Services text chatter.

Text Chat allows the IRS to offer real-time chat assistance and enables assistants to exchange text messages, files, webpages, and other information, via secure messaging, to address inquiries. Use the "start a conversation" button, located on the bottom right of the page for these self-help options or to begin a chat with a live agent.

Voice Bots mean less time on hold for taxpayers. IRS voice bots enable taxpayers to authenticate their identity to establish payment plans, request a transcript and obtain information about their accounts, such as payoff details.

The [Interactive Tax Assistant](#) answers general tax law questions, including helping to determine if a type of income is taxable or if someone is eligible to claim certain credits and deductions.