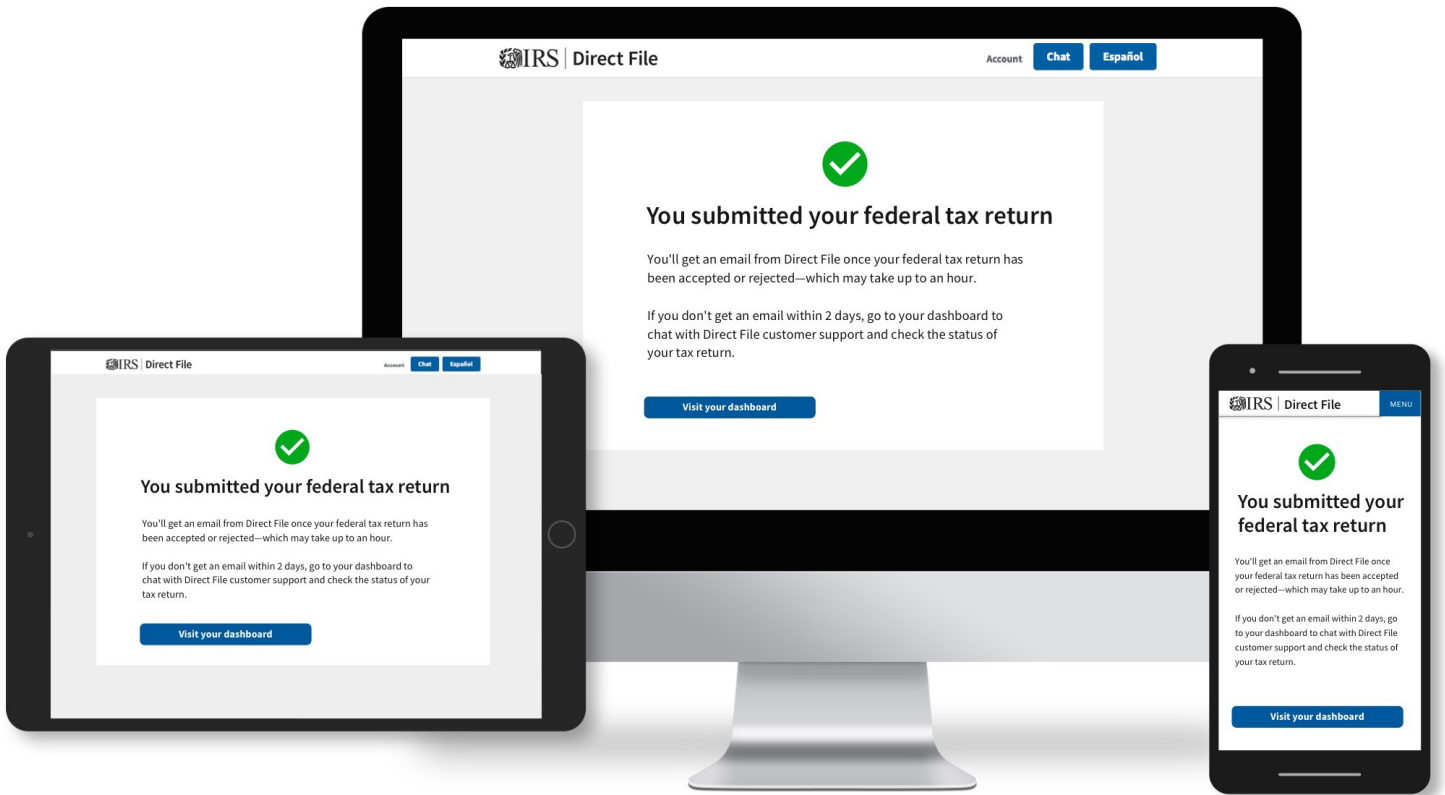




Direct File Outreach Guide

IRS | Direct File Outreach Guide

Thank you for your interest in **IRS Direct File**. Your partnership is critical to helping ensure that eligible taxpayers are aware of Direct File and can successfully file their 2024 federal taxes using this now permanent online service in 2025.

This guide includes information to help you engage taxpayers in your community, make sure they know about Direct File, and understand whether they are eligible.

To stay up to date, visit directfile.irs.gov, subscribe to the [Direct File newsletter](#) or visit [Direct File](#) on IRS.gov.

If you plan on conducting outreach activities, please email the stakeholder engagement team at Direct.File.Outreach@irs.gov and let us know so we can keep in touch.

With many thanks,

The Direct File Outreach Team

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IRS Direct File – What’s New

During the 2025 filing season, IRS Direct File is a filing option that eligible taxpayers in 25 states can use to file their federal taxes online directly with the IRS, for free.

After a successful pilot during the 2024 tax filing season, where more than 140,000 taxpayers filed their tax returns using Direct File, the IRS made Direct File a permanent filing option.

In 2025, Direct File will be available in more than twice the number of states for eligible taxpayers to file their 2024 federal tax returns. It will cover a far greater number of tax situations. And new features will make the tax filing process quicker and easier.

Last year, taxpayers in 12 pilot states were eligible to use the Direct File pilot: Arizona, California, Florida, Massachusetts, Nevada, New Hampshire, New York, South Dakota, Tennessee, Texas, Washington, and Wyoming. For the 2025 tax filing season, eligible taxpayers in the 12 pilot states and 13 new states can see if they’re eligible for Direct File: Alaska, Connecticut, Idaho, Illinois, Kansas, Maine, Maryland, New Jersey, New Mexico, North Carolina, Oregon, Pennsylvania, and Wisconsin.

More states have expressed interest in participating in Direct File in future years. If Direct File is not available in your state for the 2025 tax filing season, please check back for updates.

More Tax Situations Covered for 2025

In 2025, taxpayers in the participating states will see more tax situations covered than the pilot. Direct File will cover more types of income, more credits, and more deductions than last year, allowing far more taxpayers to take advantage of this free filing option if it’s right for them.

Direct File will also feature key updates that will make filing taxes even quicker and easier. Last year, thousands of users got help filing their taxes through Direct File’s live chat customer service feature in English and Spanish. Live Chat is available again in English and Spanish, and it will be available with additional authentication and verification to allow chat assistants to provide more information.

This year, taxpayers can also try a new Chat Bot that can provide guided help on the eligibility checker.

How it works

- IRS Direct File allows taxpayers to easily file taxes online directly with the IRS – for free.
- Direct File guides taxpayers through answering questions to prepare their tax return step-by-step. It works as well on a mobile phone as it does on a laptop, tablet, or desktop computer.
- Direct File is available in English and Spanish, with customer service in both languages.
- Taxpayers using Direct File will be able to get help from dedicated IRS Direct File customer support representatives through a live chat feature, which is available in English and Spanish.
- Eligible taxpayers from 25 states can choose to file using Direct File: Alaska, Arizona, California, Connecticut, Florida, Idaho, Illinois, Kansas, Maine, Maryland, Massachusetts, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, Oregon, Pennsylvania, South Dakota, Tennessee, Texas, Washington, Wisconsin, and Wyoming.
- Roughly 30 million taxpayers across those 25 states will be eligible to use Direct File to file 2024 federal tax returns during the 2025 tax filing season.

Eligibility

Participating states

Direct File is an option if you lived in one of these participating states in 2024 for the entire year: Alaska, Arizona, California, Connecticut, Florida, Idaho, Illinois, Kansas, Maine, Maryland, Massachusetts, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, Oregon, Pennsylvania, South Dakota, Tennessee, Texas, Washington state, Wisconsin, and Wyoming.

Direct File and the state tax authority work together to help you file both your federal and state return. If you need to file more than one state tax return, you cannot use Direct File.

Income

- **W-2 wage income**
- **SSA-1099 Social Security income**
- **1099-G unemployment compensation**
- **1099-INT interest income**
- **1099- R retirement income**
- 1099-MISC for Alaska residents reporting the **Alaska Permanent Fund Dividend**

You can't use Direct File if you had other types of income, such as **gig economy**, **rental** or **business income**.

Credits

- **Earned Income Tax Credit**
- **Child Tax Credit**
- **Credit for Other Dependents**
- **Child and Dependent Care Credit**
- **Premium Tax Credit**
- **Credit for the Elderly or Disabled**
- **Retirement Savings Contributions Credit**

Deductions

- **Standard deduction**
- **Student loan interest**
- **Educator expenses**
- **Health Savings Account contributions**

You can't use Direct File if you **itemize deductions**.

Taxpayers receiving other types of income or claiming credits and deductions not on the list above or who do not live in one of participating states will not be able to use Direct File.

Eligible taxpayers with a Social Security number (SSN) or an Individual Taxpayer Identification Number (ITIN) who live in a participating state who have only the types of income, credits, and deductions listed above, can choose to file directly with the IRS – for free – using IRS Direct File.

Examples of who is eligible

Examples of taxpayers who may be eligible to use IRS Direct File to file 2024 federal tax returns in 2025:

- A parent with W-2 income that claims the Earned Income Tax Credit, Dependent Care Credit and Child Tax Credit.
- A recent graduate with W-2 income, who pays student loan interest and gets their health insurance from the Health Insurance Marketplace and claims the Saver's Credit.
- A retired senior citizen with Social Security, interest and retirement income who claims the Credit for the Elderly or Disabled.

How to file using IRS Direct File

1. **Go to directfile.irs.gov to check your eligibility and see if Direct File is a good fit for you.** If you're not eligible, we'll connect you to alternative filing options.
2. **Sign-in to Direct File securely** using your email and a secure password to **verify your identity**. The IRS lets you access most tax tools with one account using the same login and password. If you already have an IRS online account, you can use it for Direct File.
3. **Complete your return** – Direct File will guide you through a series of questions to help you file quickly and easily. You can get support from dedicated IRS customer support specialists through a live chat feature if you need help.
4. **Review your return, input your payment or refund information, and submit your federal return!** Direct File will email you once your return has been accepted by the IRS.
5. **File your state return.** If you need to file a state return, Direct File will connect you with your state's online filing tool to help you get started. In many cases, Direct File users can even import their federal return data directly to their state tool.

Outreach method and audiences

Your outreach method and intended audience will help determine how you describe eligibility for Direct File. Complete eligibility information and Direct File's easy-to-use eligibility screener will be found at directfile.irs.gov.

National audience

- **Eligible filers in 25 participating states** can use IRS Direct File to file their federal taxes directly with the IRS for free! Head to directfile.irs.gov to learn more.
- IRS Direct File is now a free, permanent tax filing option, open to eligible **filers in 25 participating states**. Head to directfile.irs.gov to learn more.
- Subscribe to the [Direct File newsletter](#) or get the latest updates in [Direct File news](#) or on irs.gov/directfile.

State audience

- Eligible filers in <State> can use IRS Direct File to file their federal taxes online directly with the IRS for free! Head to directfile.irs.gov to learn more.
- Eligible <State> filers can use IRS Direct File to file their federal taxes online directly with the IRS for free! Head to directfile.irs.gov to learn more.
- IRS Direct File is open for free to eligible filers in <State>. Head to directfile.irs.gov to learn more.

Outreach timeline

Recommended timeline to help partner organizations understand the sequence of events.

December 2024

- Partners can start Direct File outreach with a special emphasis on encouraging eligible taxpayers to prepare to file.
- Partners could collaborate to share best practices and early lessons regarding Direct File outreach.
- Partners can send out the Initial outreach email included in this resource guide.

Early– Mid January 2025

- Partners could conduct general outreach about Direct File noting the start of the tax filing season.
- Encourage audience to get ready to file, file early if they're ready, and consider using Direct File if they are eligible.

Mid – Late January

- Filing season begins in early 2025 (exact date to be announced in January).
- Partners can contact taxpayers interested in Direct File and encourage them to get ready to use Direct File when the filing season starts if they are ready to file.
- Partners could send out the Get ready email included in this toolkit.

2025 filing season start date: Partners may send the Go email included in this toolkit.

February 2025

- Ahead of President's Day Weekend (February 14-17), which has historically seen a surge in tax filing, partners could engage with audiences to remind them about Direct File.
- Encourage them to consider it if they are filing their taxes during the holiday weekend.

March – April 2025

- Partners can continue broad outreach efforts promoting Direct File to eligible taxpayers.
- Taxpayers can continue to file with Direct File through April 15.
- Partners could send the Follow-up email included in this toolkit.

Email templates

Please feel free to revise the templates below as you see fit, being sure to complete the sections highlighted yellow to customize them for your audience.

December 2024: Initial outreach email

Hello there!

As you may have heard, IRS Direct File is now a permanent option for eligible people in 25 states to file their federal taxes online directly with the IRS – for free! **We have teamed up with the IRS to get the word out about this important program.**

The Direct File service is available in English and Spanish, works on mobile devices as easily as it does tablets, laptops, and desktop computers, and includes dedicated customer support directly from the IRS. After a successful pilot last year, Direct File will be available on the first day of the 2025 tax filing season to file 2024 tax returns.

Direct File is an option for eligible taxpayers in 25 states in 2025, including Alaska, Arizona, California, Connecticut, Florida, Idaho, Illinois, Kansas, Maine, Maryland, Massachusetts, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, Oregon, Pennsylvania, South Dakota, Tennessee, Texas, Washington, Wisconsin, and Wyoming. You can use Direct File's Eligibility Checker to help you figure out if it's a good fit for your tax situation and filing needs.

- If you're interested in using Direct File:
- Sign up to receive a reminder from us by **<insert action here, such as: filling out this form, replying to us here, contacting us at <email address>.**
- Subscribe to the Direct File newsletter or get the latest updates in **Direct File news.**
- Visit directfile.irs.gov to learn more and check again in as we get close to the start of tax filing season in early January.

<Signature>

January 2025: Get ready email before filing season starts.

Hello!

With tax season starting **next week**, we want to make sure you're aware of the IRS's tax filing service, IRS Direct File. **We have teamed up with the IRS to get the word out about this important program.** Eligible people can choose this online option to file their federal taxes directly with the IRS for free! It's available in English and Spanish, works on mobile devices as well as it does on tablets and personal computers, and includes dedicated live chat support from IRS customer service specialists.

If you're interested, get ready to use Direct File starting on the first day of the tax filing season if you are ready to file. The Direct File's Eligibility Checker will quickly help you find out if your tax situation is supported before you file, and if you're not eligible to use Direct File this year, the service will connect you to alternative filing options. More information about the tax situations supported by Direct File is available at directfile.irs.gov.

Direct File is open to people who lived in one of Direct File's 25 states in 2024 for the entire year, including Alaska, Arizona, California, Connecticut, Florida, Idaho, Illinois, Kansas, Maine, Maryland, Massachusetts, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, Oregon, Pennsylvania, South Dakota, Tennessee, Texas, Washington, Wisconsin, and Wyoming.

For more information about IRS Direct File, please visit directfile.irs.gov.

<Signature>

2025 filing season start date : email on or after the first day of the tax filing season.

Hello!

IRS Direct File is now open and ready to use! Head to directfile.irs.gov to get started.

We have teamed up with the IRS to get the word out about this important program. Direct File is a service from the IRS for eligible taxpayers to file their federal taxes directly with the IRS online for free. It's available in English and Spanish, works on a mobile device as well as it does on tablets and personal computers, and includes dedicated support from IRS customer service specialists.

Direct File covers many tax situations, and it's available to eligible people living Direct File's 25 states, including Alaska, Arizona, California, Connecticut, Florida, Idaho, Illinois, Kansas, Maine, Maryland, Massachusetts, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, Oregon, Pennsylvania, South Dakota, Tennessee, Texas, Washington, Wisconsin, and Wyoming.

Did you try Direct File? The Direct File team wants to hear your thoughts and opinions to make it a better experience. Just email direct-file-feedback@coforma.io by the end of April with name and "Direct File Feedback" on the email subject. Participation is confidential and will not affect your taxes.

<Signature>

Feb, March, April 2024: Follow-up email(s) sent as reminders ahead of President's Day weekend (February 14 - 17, 2025) and Tax Day (April 15, 2025)

Hello!

Tax day is quickly approaching, but it's not too late to use IRS Direct File to file your taxes directly with the IRS for free. Head to directfile.irs.gov to get started.

We have teamed up with the IRS to get the word out about this important program. Direct File is a service from the IRS that will let people file their federal taxes directly with the IRS online for free. It's available in English and Spanish, supports many tax situations, and is available to people living in 25 states, including Alaska, Arizona, California, Connecticut, Florida, Idaho, Illinois, Kansas, Maine, Maryland, Massachusetts, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, Oregon, Pennsylvania, South Dakota, Tennessee, Texas, Washington, Wisconsin, and Wyoming.

Did you try Direct File? The Direct File team wants to hear your thoughts and opinions to make it a better experience. Just email direct-file-feedback@coforma.io by the end of April with your name and "Direct File Feedback" on the email subject. Participation is confidential and will not affect your taxes.

<Signature>

Outreach assets and content

We have created some assets and content you can use when conducting outreach about Direct File. Please feel free to revise this content to better meet the needs of your audience.

If you create your own outreach materials and want to share them with our team, please send them to our stakeholder engagement team at Direct.File.Outreach@irs.gov.

IRS Direct File

Social Share Graphic (portrait)

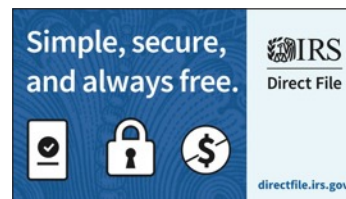
[Download Here](#)



IRS Direct File

Social Share Graphic (landscape)

[Download Here](#)



IRS Direct File

Social Share Graphic (square)

[Download Here](#)



IRS Direct File Social Media Captions

We've teamed up with the IRS to get the word out that you can file your taxes with IRS Direct File, the simple, secure, and always free way to file your taxes online directly with the IRS. Get started at directfile.irs.gov. #DirectFile #AlwaysFree

We've teamed up with the IRS to get the word out that you can file your taxes directly with the IRS for free and avoid paying tax preparation fees. Learn more at directfile.irs.gov. #DirectFile

We've teamed up with the IRS to get the word out that starting this year, you can file your taxes directly with the IRS via IRS Direct File. Get started at directfile.irs.gov and file your taxes for free from your mobile device or personal computer.

We've teamed up with the IRS to get the word out that IRS Direct File is helping transform how people file their federal taxes! Direct File lets people file their federal taxes directly with the IRS, without needing to use a paid preparer or give their personal information to a third party. Head to directfile.irs.gov to get started!

We've teamed up with the IRS to get the word out that IRS Direct File is the simple, secure, and always free way to file your federal taxes. The service will be available on Day 1 of the 2025 tax filing season. Head to directfile.irs.gov to learn more!

IRS Direct File Text Script for subscribers via SMS or for social media posts.

Hi **[first name]**, this is **[organization]**. We've teamed up with the IRS to let you know that you may be eligible to use IRS Direct File, the IRS's free tax filing online service. It's simple, secure, and always free. Go to directfile.irs.gov to learn more.

IRS Direct File Radio PSA Script (30 seconds)

A message from **[Organization name]**. We've teamed up with the IRS to get the word out that Direct File is a permanent, free tax filing option.

IRS Direct File lets people file their federal taxes online directly with the IRS from the convenience of their mobile device or personal computer. It's available in English and Spanish and is designed to be simple, secure, and always free.

IRS Direct File: simple, secure, and always free. Head to "direct file dot IRS dot gov" to get started.

Feedback opportunities

General feedback about Direct File from partner organizations can be sent to our stakeholder engagement team at Direct.File.Outreach@irs.gov.

As part of the Direct File evaluation, the Direct File team will be seeking feedback from taxpayers about their experience, what worked well, and what didn't.

These will be short interviews by phone or video conference and selected participants will be compensated for time spent providing feedback.

If you have any community members who are willing to provide feedback, please ask them to email [direct-file- feedback@coforma.io](mailto:direct-file-feedback@coforma.io) with their name and "Direct File Feedback" on the email subject by April 30, 2025.

Participation is confidential and will not affect participants' taxes.

Other free options: Free File, VITA, TCE

If IRS Direct file is not an option for you, here are other ways to file:

- [An IRS Free File partner](#)
- [E-file options](#)
- [Free tax return preparation for qualifying taxpayers](#)
- [Paper tax returns with or without payment](#)

Frequently Asked Questions

What is Direct File? Direct File is a digital service that allows taxpayers to file their federal taxes directly with the IRS for free. Following a successful pilot in 2024, the IRS made Direct File a permanent tax filing option. This year, Direct File is available to eligible taxpayers in 25 states. See directfile.irs.gov for pilot information and updates.

Who is eligible for IRS Direct File? Direct File supports many common tax situations, including wage income from jobs that's reported on a W-2, social security income, pension, and annuity income, and more. The service supports several tax credits such as the Earned Income Tax Credit, the Child Tax Credit, Credit for Other Dependents and Dependent Care Credit, Premium Tax Credit, and others. Direct File supports deductions for student loan interest, educator expenses, and Health Savings Accounts.

In which states will IRS Direct File be available in 2025? The Direct File is projected to be available to eligible taxpayers residing in 25 states, including Alaska, Arizona, California, Connecticut, Florida, Idaho, Illinois, Kansas, Maine, Maryland, Massachusetts, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, Oregon, Pennsylvania, South Dakota, Tennessee, Texas, Washington, Wisconsin and Wyoming.

Taxpayers who lived in one of those 25 states in 2024 for the entire year may be eligible to use Direct File this year. Interested taxpayers can check their eligibility for Direct File at directfile.irs.gov.

IRS Resources

- [IRS Direct File set to expand availability in new states and cover wider range of tax situations for the 2025 tax filing season | Internal Revenue Service](#)
- directfile.irs.gov
- [Direct File newsletter](#)
- [Direct File on IRS.gov](#)
- [IRS makes Direct File a permanent option to file federal tax returns; expanded access for more taxpayers planned for the 2025 filing season | Internal Revenue Service](#)
- [Publication 5969, IRS Direct File Pilot Program: Filing Season 2024 After Action Report](#)
- [Publication 5916, File for free with Direct File](#)
- [Publication 5917, Direct File - What you need to Know](#)
- [Publication 5949, Helpful tips to prepare you for IRS Direct File](#)
- [Publication 5952, Are you ready to file with IRS Direct File?](#)
- [IRS Direct File YouTube video](#)