

Connecticut Telefile Tax Return

**2007
Telefile**

Use your telephone to file. Do not mail.

Your Name(s)

Quick Start Checklist!

- Complete federal return.
- Fill in Items 1 through 10.
- Call **860-289-4TAX**.

1A. Your Social Security Number - -

1B. Spouse's Social Security Number (if filing a joint return) - -

2. Personal Identification Number (PIN)

If you can not locate your PIN, see Page T6.

3. **Filing Status:** Your filing status must be the same as your federal income tax filing status for the 2007 taxable year. Confirm your filing status. The *Telefile* system will provide your 2006 filing status.

Single
 Married filing jointly
 Married filing separately
 Head of household
 Civil union filing jointly
 Civil union filing separately
 Qualifying widow(er) with dependent child

4. **Federal Adjusted Gross Income (AGI)** from your federal Form 1040EZ, Line 4; Form 1040A, Line 21; or Form 1040, Line 37. 4.

5. Check the box to indicate the form used to file your 2007 federal return. 1040EZ 1040A 1040

Refunds of State and Local Income Taxes: Enter "0" here if your 2007 federal return is a Form 1040EZ or Form 1040A. If you filed federal Form 1040, enter the amount reported on federal Form 1040, Line 10. 5.

6. Enter the total number of W-2 forms and any 1099 forms (maximum of seven) showing Connecticut income tax withholding. 6.

7. Enter the Federal Employer Identification Number and Connecticut income tax withheld for each W-2 form or 1099 form included in Item 6. See instructions on Page T6.

Column A W-2 or 1099	Column B Employer Identification Number From W-2 or 1099 Forms	Column C Connecticut Income Tax Withheld
1st	<input type="text"/> <input type="text"/> - <input type="text"/>	.00
2nd	<input type="text"/> <input type="text"/> - <input type="text"/>	.00
3rd	<input type="text"/> <input type="text"/> - <input type="text"/>	.00
4th	<input type="text"/> <input type="text"/> - <input type="text"/>	.00
5th	<input type="text"/> <input type="text"/> - <input type="text"/>	.00
6th	<input type="text"/> <input type="text"/> - <input type="text"/>	.00
7th	<input type="text"/> <input type="text"/> - <input type="text"/>	.00

8. Enter total amount of property taxes paid to your town on: See instructions on Page T6.

Auto 1	Auto 2 <small>(See instructions.)</small>	Primary Residence <small>(Total of all installments)</small>
8A <input style="width: 100px;" type="text"/> .00	8B <input style="width: 100px;" type="text"/> .00	8C <input style="width: 100px;" type="text"/> .00

9. **Individual Use Tax:** See instructions on Page T7. Enter the individual use tax due if you purchased taxable goods or services and did not pay Connecticut sales tax on the purchase. If none enter "0." 9.

10. **Want your refund directly deposited or your tax due automatically withdrawn?** Fill in Items 10A, 10B, and 10C (and 10D for direct payment).

10A. Account Type
 1 - Checking
 2 - Savings

10B. Routing Number

10C. Account Number

Complete Item 10D only if you want your tax due withdrawn at a future date. See instructions on Page T7.

10D. Enter the date you want your tax due withdrawn from your account (no later than April 15, 2008). **2 0 0 8**

M M D D

Individual Use Tax Schedule

Complete this schedule if you have a Connecticut individual use tax liability. You owe use tax if you purchased taxable goods or services during the taxable year and did not pay Connecticut sales tax on the purchases. Individual items with the purchase price of \$300 or more must be listed separately below. Although you do not need to list separately any individual item with a purchase price of less than \$300, the items are subject to tax and the total of the purchase prices of these items should be reported on Line A. Multiply the sales and use tax rate by the purchase price of the item and enter the result in Column E. You must enter "0" in Item 9 if no Connecticut use tax is due.

Column A	Column B	Column C	Column D	Column E	Column F	Column G
Date of purchase	Description of goods or services	Retailer or service provider	Purchase price	CT tax due (.06 X Column D)	Tax, if any, paid to another jurisdiction	Balance due (Col. E - Col. F, but not less than zero)
A. Total of individual purchases under \$300 not listed above						00
Total Individual Use Tax: Add amounts in Column G. Enter here and in Item 9 of the <i>Connecticut Telefile Tax Return</i> . See Informational Publication 2007(27) , Q & A on the <i>Connecticut Individual Use Tax</i> , for more information.						00

Completing the Connecticut Telefile Tax Return

1A. Social Security Number (SSN): Enter your SSN.

1B. Spouse's SSN: For a married filing joint return, enter your spouse's SSN. Enter your SSN and your spouse's SSN in the order your names appear on the label on the back of this booklet.

2. Personal Identification Number (PIN): Enter the four-digit PIN assigned to you by DRS. A new PIN is assigned each year. When you access the *Telefile* system, you will be advised where to find your PIN. If you do not know your PIN you may be able to access it during your *Telefile* call by pressing the star (*) key when prompted for your PIN. You must provide your prior year federal adjusted gross income from Form CT-1040EZ or Form CT-1040, Line 1, or Connecticut Telefile Tax Return, Item 4.

3. Filing Status: Check the **same** filing status box that you checked on your 2007 **federal** income tax return. If you are a civil union partner, your filing status for Connecticut income tax purposes will not match your federal income tax filing status. Any reference in this document to a spouse also refers to a party to a civil union recognized under Connecticut law.

4. Federal Adjusted Gross Income (AGI): Enter your federal **AGI** from your 2007 **federal** income tax return. This is the amount reported on **federal** Form 1040EZ, Line 4; **federal** Form 1040A, Line 21; or **federal** Form 1040, Line 37.

5. Refunds of State and Local Income Taxes: Enter the amount of taxable refunds of state and local income taxes you **reported on Line 10** of your 2007 **federal** Form 1040. If Line 10 is blank or if you filed **federal** Forms 1040A or Form 1040EZ, enter **"0."**

6. Number of W-2 and 1099 Forms: Enter the total number of W-2 and 1099 forms you received for the 2007 taxable year that show **Connecticut income tax withheld**. Include your spouse's W-2 and 1099 forms if you are filing a joint return.

You **may not telefile** this return if you received **more than seven** W-2 or 1099 forms that show Connecticut income tax withheld.

7. W-2 and 1099 Information: Verify that **Box 15** of each W-2 shows **Connecticut income tax withheld**. See sample W-2 on Page T3.

Column B: Enter from each W-2 form the nine-digit Federal Employer Identification Number (FEIN) located in **Box b**. For each 1099, enter the payer's nine-digit FEIN. For unemployment compensation, this number is located directly below the address

for the Department of Labor. If the number is unclear or missing, contact your employer or payer.

Column C: Enter the Connecticut income tax withheld shown on **each** W-2 or 1099 form (from Form W-2, **Box 17**; Form W-2G, **Box 14**; Form 1099-R, **Box 10**; Form 1099-MISC, **Box 16**; or Form UC-1099G, **Box 5**).

8. Property Tax Paid

Auto 1 - Enter the **total** amount of property tax due and paid during 2007 to a Connecticut municipality on your motor vehicle.

Auto 2 - If your filing status is married filing jointly, civil union filing jointly, or qualifying widow(er) with dependent child, enter the **total** amount of property tax due and paid during 2007 to a Connecticut municipality on your second motor vehicle, if any.

Primary Residence - Enter the **total** amount of property tax due and paid during 2007 to a Connecticut municipality on your primary residence.

You may take credit against your 2007 Connecticut income tax liability for property tax payments you made on your primary residence and privately owned or leased motor vehicle to a Connecticut political subdivision. Generally, property tax bills due and paid during 2007 qualify for this credit. This includes any installment payments you made during 2007 that were due in 2007 and any installments you prepaid during 2007 due in 2008. Supplemental property tax bills due during 2007 or 2008 also qualify if paid during 2007. However, the late payment of any property tax bills or the payment of any interest, fees, or charges related to the property tax bill do not qualify for the credit. The maximum credit allowed is **\$500** per return, regardless of your filing status, and may be limited based upon your Connecticut adjusted gross income. A husband and wife or civil union partners who file a joint Connecticut income tax return may include property tax bills for which each spouse is individually or jointly liable.

You may take credit for a leased motor vehicle if you had a written lease agreement for a term of more than one year and the property tax became due and was paid during 2007 (either by the leasing company or by you). Refer to your January 2008 billing statement from the leasing company to determine the amount of property taxes that may be eligible for the credit.

The *Telefile* System automatically calculates your allowable credit. See **Informational Publication 2007(21)**, *Q&A: Income Tax Credit for Property Taxes Paid to a Connecticut Political Subdivision*.

9. Individual Use Tax: If you purchased taxable goods or services during 2007 and did not pay Connecticut sales tax, complete the *Individual Use Tax Schedule* on Page T6. Generally, this is for purchases made or shipped from outside of Connecticut. Enter the total individual use tax due in Item 9. **If none, enter "0."** See **Informational Publication 2007(27)**, *Q&A on the Connecticut Individual Use Tax*.

10. Direct Deposit or Direct Payment: You can elect to have your refund directly deposited or your tax due automatically withdrawn from your checking or savings account.

Expecting a refund? By completing Items 10A, 10B, and 10C, you can have your refund directly deposited into your checking or savings account.

If any of the bank information you supply for direct deposit does not match, a paper check will automatically be issued to you. Some financial institutions do not allow a joint refund to be deposited into an individual account.

Expecting to owe tax? By completing Items 10A, 10B, 10C, and 10D, you can have the funds automatically withdrawn from your checking or savings account. See *Pay by Direct Payment* below. Before calling *Telefile*, check with your financial institution to make sure an automatic withdrawal is allowed and to verify the correct routing and account numbers.

Enter your nine-digit bank routing number and your bank account number in Items 10B and 10C. Your bank routing number is the first nine-digit number printed on your check or savings withdrawal slip. Your bank account number generally follows the bank routing number. Do not include the check number as part of your account number. Bank account numbers can be up to 17 digits and must be numeric. See sample check on Page T3.

The *Telefile* System will provide you with the amounts to enter in Items 11 through 17.

11. Property Tax Credit: This is the amount of credit you are allowed for property taxes you paid during 2007 on your motor vehicle, primary residence, or both.

12. Total 2007 Connecticut Tax: This is your total Connecticut tax liability which includes individual use tax and property tax credit, if applicable.

13. Total Connecticut Income Tax Withheld: This is the total Connecticut income tax withheld as shown on your W-2 and 1099 forms.

14. Tax Due: This is the amount of tax you owe. Pay the amount in full with your return. If the amount you owe is \$1,000 or more, you may be subject to interest on the underpayment of estimated income tax.

You have until April 15, 2008, to pay by direct payment, credit card, or check. The *2007 Connecticut Telefile Payment Voucher* must accompany all payments sent by mail.

Payment Options

Pay by Direct Payment:



Complete Items 10A, 10B, 10C, and 10D. By completing Item 10D, you can request to have the tax you owe withdrawn at a future date, but no later than April 15, 2008. **Direct Payments are accepted only during your *Telefile* call.**

Pay by Credit Card:



- Call Official Payments Corporation toll-free at **1-800-2PAY-TAX** (1-800-272-9829). You will be asked to enter the Connecticut Jurisdiction Code: 1777; or
- Visit: **www.officialpayments.com** and select *Payment Center*.

A convenience fee will be charged by the credit card service provider. The fee is 2.49% of your total tax payment. You will be informed of the amount of the fee and you may elect to cancel the transaction. At the end of the transaction, you will be given a confirmation number for your records.

Your payment will be effective on the date you make the charge.

Pay by Mail: Make your check payable to **Commissioner of Revenue Services**. To ensure proper posting of your payment, write "**2007 Telefile**" and your SSN(s) (optional) on the front of your check. DRS may submit your check to your bank electronically. Mail the *2007 Connecticut Telefile Payment Voucher* along with your payment to:

**Department of Revenue Services
PO Box 5088
Hartford CT 06102-5088**

Failure to file or failure to pay the proper amount of tax when due **will result in penalty and interest charges**. It is to your advantage to file when your return is due whether or not you are able to make full payment.

15. Overpayment of Tax: If you have an overpayment in Item 15, the *Telefile* System will ask if you would like to contribute all or a portion of the overpayment to one or more of the six designated funds. You may not know if you have overpaid your taxes until you make your *Telefile* call. If you wish to make a contribution, you should be prepared to identify the fund(s) and the amount of your contribution(s).

16. Total Contributions: If you make contributions, the *Telefile* System will total the amount of contributions made to the six designated funds.

17. Refund: This is the amount of your refund. You may choose to have this amount deposited directly into your bank account or have a check mailed to you.

18. Confirmation Number: You **must** stay on the line for your 13-digit confirmation number. The *Telefile* system will provide you with a confirmation number. Write this number in Item 18. Once you have this confirmation number, your tax return is filed.

If you have a change or correction to your Connecticut income tax liability after you receive your confirmation number, you must complete **2007 Form CT-1040X**, *Amended Connecticut Income Tax Return*.

Keep your *Telefile* Tax Return, W-2s, and other tax statements for your records.

2007 Connecticut Telefile