

Form 4868 Bulk Upload Instructions

Document Overview:

Tax Year	Template Version	Last Updated on
2025	Form4868_template_1.0	Jan, 2026

General Instructions

File Specifications

- **File Format:** Ensure the file is saved as .CSV (Comma-Separated Values). Other formats like .xls or .xlsx are not supported. See how to convert other file formats to CSV.
- **File Size:** The file size should not exceed the specified limit (e.g., 15 MB). Split large files into smaller ones if necessary.
- **Row Limit:** Rows exceeding 20,000 entries should be split into multiple files to ensure smooth processing.
- **Encoding:** Use UTF-8 encoding to avoid errors with special characters or unsupported languages.

Data & Input Specification

- **Form 4868:** Each row is equivalent to one Form 4868 return
- **Mandatory Fields:** Fields marked with an asterisk (*) must be filled in for every record.
- **Empty Fields:** If a value is not applicable, leave the field blank rather than using placeholders like "N/A" or "NULL".
- **Header Column Order:** Do not change the header column, as the system maps data based on column position.
- **Duplicate Records:** Duplicates can cause errors or inconsistencies in the submission

process. Therefore, ensure that each record is unique by removing any duplicate rows.

- **Predefined Values:** For fields with fixed-choice options, ensure you use values exactly as defined in the template instructions.
- **Sheet Name:** Do not change the sheet name.

Field Validations

Make sure your Form 4868 details are entered correctly in the bulk upload template before filing.

Field Name	Description	Maximum Length	Input Characters
Filing Type	Choose the filing type (Single filing / Joint Filing)	-	1=Single Filing 2=Joint Filing
Primary Taxpayer First Name*	Enter the first name of primary taxpayer	20	Alphabets and space
Primary Taxpayer Middle Name	Enter the middle name of primary taxpayer	20	Alphabets and space
Primary Taxpayer Last Name*	Enter the last name of primary taxpayer	20	Alphabets and space
Primary Taxpayer Suffix	Suffix of the primary taxpayer	6	Alphabets and Numbers All special characters allowed except < > ; { } [] _ \ ! : ? = Allowed values: "Junior", "Jr", "Senior", "Sr", "I", "II", "III", "IV", "V", "VI", and "VII".

Primary Taxpayer SSN	SSN of Primary taxpayer	9	Numbers and hyphen (122-34-5675 or 123456789)
Daytime Phone	Phone number of Primary Taxpayer	15	Numbers, hyphen, and brackets
Spouse First Name*	Enter the first name of Spouse	20	Alphabets and space(Only enter if filing type is joint filing)
Spouse Middle Name	Enter the middle name of Spouse	20	Alphabets and space(Only enter if filing type is joint filing)
Spouse Last Name*	Enter the last name of spouse	20	Alphabets and space(Only enter if filing type is joint filing)
Spouse Suffix	Suffix of the spouse	6	Alphabets and Numbers All special characters allowed except < > ; { } [] _ \ ! : ? = Allowed values: "Junior", "Jr", "Senior", "Sr", "I", "II", "III", "IV", "V", "VI", and "VII".
Spouse SSN*	SSN of Spouse	9	Numbers and hyphen (122-34-5675 or 123456789)
Address line 1*	Mailing Street Address	35	Alphabets and Numbers All special characters allowed except < > ; { } [] _ \ ! : ? =
Address line 2	Additional address details (Suite, Apt, Unit, etc.).	35	Alphabets and Numbers All special characters allowed except < > ; { } [] _ \ ! : ? =
City/town*	Enter city or town name.	22	Alphabets and Numbers

			Note: If left blank, it will be considered as "0".
Balance Due*	Auto-calculated from Tentative Tax minus Total Payments.	10	Numbers Note : Total Tentative Tax - Total Payments and Credits
Amount to be paid to IRS	Amount to be paid to IRS	10	Numbers
Payment Option*	Choose the payment method (EFW or Check/Money or Credit/Debit).	–	(EFW /Check/Money/Credit/Debit)
Account Type [If EFW selected] (1=Checking 2-Savings)*	Select the bank account type for EFW payments.	–	(Checking/Savings)
Bank Account Number (If EFW selected)*	Enter the bank account number.	17	Numbers
Bank Routing Number (If EFW selected)*	Enter the 9-digit bank routing number.	9	Numbers
Self Selected PIN of Primary Taxpayer (If EFW selected)*	Any 5-digit PIN (cannot be all zeros).	5	Any 5-digit PIN (not all zeros)
Date of Birth of Primary Taxpayer (If EFW is selected)	Enter the DOB of Primary Taxpayer	mm/dd/yyyy	Date Format
Self Selected PIN of Primary Taxpayer (If EFW selected)*	Any 5-digit PIN (cannot be all zeros).	5	Any 5-digit PIN (not all zeros)

			Note: Enter this field only if filing type is joint filing
Date of Birth of Spouse (If EFW is selected)	Enter the DOB of Spouse	mm/dd/yyyy	Enter this field only if filing type is joint filing
Verification(1=Previous Year PIN,2=Previous Year AGI)	Choose the Verification Method	-	Previous Year PIN / Previous Year AGI Note:Enter this field only if EFW is entered
Previous Year Primary Taxpayer PIN*	5 digit Previous Year PIN of Primary Taxpayer	5	Numbers
Previous Year Spouse PIN*	5 digit Previous Year PIN of Primary Taxpayer	5	Numbers Note:Enter this field only if filing type is joint filing and verification method is PIN
Previous Year AGI of Primary Taxpayer *	Previous Year AGI of Primary Taxpayer PIN	9	Numbers Note:Enter this field only if Verification method is AGI
Previous Year AGI of Spouse*	Previous Year AGI of Spouse	9	Numbers Note:Enter this field only if Verification method is AGI and Filing type is Joint filing

Error Handling

Once the data is uploaded, you can review the import summary. If there are any errors in the imported data, you can fix the errors by clicking **'Fix Error'** under the **'Action'** column. You'll also have the option to skip the errors and proceed with the success records.

If there are multiple errors, follow these steps to export and fix the errors.

1. To export the entries as a CSV file, click **'Export'** on the **'Import Summary'** page and download the file.
2. After fixing the errors, upload the file again and proceed with filing.

We recommend you follow the instructions carefully and double-check the information before uploading to avoid errors.