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Media Contact: Maura Kownacki
Phone: 312-814-1777

Illinois Department of Revenue Provides Taxpayers with Tips to Prepare for Next Year's Tax Season

CHICAGO - The Illinois Department of Revenue (IDOR) is providing taxpayers with tips and alerting them to changes they may encounter when filing their 2023 state income taxes early next year.

"The 2023 tax filing season is just around the corner and we want to ensure taxpayers are prepared and have the necessary documents and are also aware of improvements that have been made to simplify the filing process," said **IDOR Director David Harris**. "We strongly encourage electronic filing as it is the easiest way to file and also ensures the fastest refund when one is due."

Tips for Filing 2023 Returns

➤ **Gathering 2023 Tax Documents**

Some common documents, records, or receipts taxpayers may need to file include:

- Adjusted Gross Income (AGI) from 2022 IL-1040,
- Copy of federal income tax return and schedules,
- Copies of all W-2 and 1099 forms,
- Property Number and amount of property taxes paid if claiming a property tax credit,
- Voluntary emergency worker credit certificate,
- Receipts for qualified education or moving expenses, and
- Routing and account number if due a refund and choose to deposit refund directly into checking or savings account.

➤ **Determining Eligibility for Tax Credits**

Depending on circumstances, taxpayers may be able to reduce the amount of taxes owed through [tax credits](#). Some popular tax credits include the Illinois Earned Income Tax Credit (EITC), the Illinois K-12 Education Expense Credit, and the Property Tax Credit.

New this year -- [The Illinois Earned Income Tax Credit \(EITC\)](#) has been increased to 20% of the Federal EITC and expanded to include those who are:

- 18-25 years of age and older and 65 and older without a qualifying child, and
- filing with an Individual Taxpayer Identification Number (ITIN) or have children with an ITIN.

[The Volunteer Emergency Worker Credit](#) is a \$500 non-refundable tax credit given to volunteer fire emergency workers who qualify, apply, and are awarded the credit.

➤ **Filing Taxes**

There are several ways to file a state tax return. [MyTax Illinois](#), IDOR's free online account management program, has been enhanced and allows taxpayers to file returns with or without an account, operates with a simple question and answer format, and works to reduce errors by using automated calculations and prepopulated information from previous returns. In addition to free filing of Form IL-1040 through [MyTax Illinois](#), individuals may also utilize the site to make payments, respond to department inquiries, and check the status of their refunds using the [Where's My Refund?](#) link. Taxpayers may also look up IL-PINs, amounts of any estimated tax payments made, and when necessary, amounts reported on Form 1099-G with MyTax Illinois. Individuals may also choose to file using tax-prep software, a tax professional, or the paper Form IL-1040.

➤ **Expecting a Refund, Here's What to Know**

Taxpayers are encouraged to file electronically as early as possible in the tax season and choose direct deposit to ensure the fastest processing and issuance of any refunds. If taxpayers electronically file an error-free return, they should receive a direct deposit refund in approximately four weeks. Taxpayers receiving notices from IDOR should respond as quickly as possible to help expedite processing and minimize any delays in issuing refunds. IDOR continues to increase and enhance efforts to protect taxpayers from identity theft and tax fraud. These highly successful methods combat criminal activity all while striving to disperse tax refunds as quickly as possible.

➤ **Needing more time?**

While the state of Illinois does grant an automatic six-month extension to file an IL-1040 each year, taxpayers must still pay any money owed on their returns by April 15, 2024, to avoid penalties and interest. If a return cannot be filed by the due date, taxpayers may make an extension payment electronically through [MyTax Illinois](#). To pay by mail, they may use Form IL-505-I, Automatic Extension Payment for Individuals Filing Form IL-1040, to calculate and make payments.

➤ **Some Changes to the 2023 Form IL-1040, Illinois Individual Income Tax Return, and Schedules**

- The 2023 personal exemption amount is \$2,425.
- The original due date for filing the 2023 Form IL-1040 and paying the 2023 individual income tax liability is April 15, 2024.
- The extended due date for filing a return is October 15, 2024.

➤ **Assistance for Taxpayers**

IDOR's taxpayer assistance numbers are available for tax-related inquiries and include automated menus allowing taxpayers to check the status of a refund, identify an IL-PIN, or receive estimated payment information without having to wait for an agent. To receive assistance taxpayers may call 1-800-732-8866 or 217-782-3336. Free language assistance for Limited English Proficiency (LEP) individuals is available. For the most up-to-date information, forms, schedules, and instructions for the 2023 tax season, please visit IDOR's website at: tax.illinois.gov