



2017 IL-8453 Illinois Individual Income Tax Electronic Filing Declaration

(Do not mail Form IL-8453 to the Illinois Department of Revenue unless it is requested for review.)

Step 1: Provide taxpayer information

Print or type First name and middle initial Spouse's first name (and last name if different) Last name Social Security number Mailing address Spouse's Social Security number City State ZIP Daytime phone number

Step 2: Complete information from tax return

Table with 2 columns: Line number and Amount. Lines 1-5 show tax amounts, Line 6 shows filing status options.

Step 3: Complete direct deposit of refund or electronic funds withdrawal information (Optional)

To initiate a payment or refund transaction, the information in this Step must be included within the electronic transmission. Illinois does not support international ACH transactions.

7 Routing no. (RN): 8 Account no. (AN): 9 Type of account: 10 Date the payment is to be electronically withdrawn: 11 Electronic funds withdrawal amount: 12 Name on account:

Step 4: Taxpayer declaration and signature (Sign only after completing Step 2 and, if applicable, Step 3.)

- I consent that my refund may be directly deposited as designated in Step 3 and declare the information on Lines 7 through 9 is correct.
I authorize the Illinois Department of Revenue (IDOR) and its designated financial agent to initiate an ACH electronic funds withdrawal as designated in the electronic portion of my 2017 Illinois Individual Income Tax return.
I do not want direct deposit of my refund, or an electronic funds withdrawal (direct debit) of my balance due.

Under penalties of perjury, I declare the information on my electronic Form IL-1040 and the information I provided to my electronic return originator (ERO) are identical. To the best of my knowledge, my return is true, correct, and complete.

Sign here Your signature Date Spouse's signature (if joint return, both must sign) Date

Step 5: Electronic return originator (ERO) and paid preparer declaration and signature

I declare that I have examined this taxpayer's electronic Form IL-1040, the information on this Form IL-8453, and accompanying information. I have followed all requirements of this program and declare, under penalties of perjury, that to the best of my knowledge the taxpayer's return and accompanying information are true, correct, and complete.

ERO's signature Date Check if paid preparer: Firm's name or your name if self-employed Your PTIN Mailing address Federal employer identification number (FEIN) City State ZIP Daytime phone number

Step 6: Attach required documents (e.g., W-2 forms, 1099 forms, IL-1310).

Do not mail Form IL-8453 and these documents unless requested for review.



# Form IL-8453 Instructions

## General Information

Form IL-8453 is for electronic return originators' (EROs) use only. Taxpayers who file Form IL-1040, Illinois Individual Income Tax Return, using the Tax-Prep Software method must **not** use Form IL-8453.

EROs are required to retain all original IL-8453 forms and supporting documents at their site for a three-year period. These records may be maintained electronically. The Illinois Department of Revenue (IDOR) will request selected IL-8453 forms for inspection. **Do not send any IL-8453 forms unless requested.**

### Where do I mail Form IL-8453 if requested for review?

If we send you a letter requesting Form IL-8453 and any supporting documentation, we will provide our mailing address on the letter.

### What if I have questions?

If you have questions, call us weekdays at 217 524-4767 between 8 a.m. and 4 p.m.

## Step-by-Step Instructions

### Submission ID

The submission ID is a 20-character number assigned to each electronic return by the software. If we request the Form IL-8453, you must enter the submission ID at the top of the form.

### Step 1: Provide taxpayer information

Print or type the taxpayer's name, mailing address, Social Security number (SSN) and daytime telephone number. Also, include the spouse's information (if applicable). Enter the SSN(s) in the same order as on the transmitted electronic Form IL-1040.

**Note:** All information on Form IL-8453 **must** be identical to the information on the transmitted electronic Form IL-1040.

### Step 2: Complete information from tax return (whole dollars only)

- 1 Net income – Amount from Form IL-1040, Line 11, or Schedule NR, Nonresident and Part-Year Resident Computation of Illinois Tax, Step 5, Line 51.
- 2 Tax – Amount from Form IL-1040, Line 13.
- 3 Illinois Income Tax withheld – Amount from Form IL-1040, Line 26. If the amount is zero or blank, enter zero. Do **not** include amounts from Lines 16, 17, 18, 27, 28, or 29.
- 4 Overpayment – Amount from Form IL-1040, Line 36.
- 5 Total amount due – Amount from Form IL-1040, Line 40.
- 6 Filing status – Indicate the same filing status as transmitted on the electronic Form IL-1040.

### Step 3: Complete direct deposit of refund or electronic funds withdrawal information

The taxpayer can choose to directly deposit a refund or have the amount of tax due automatically withdrawn from their checking or savings account.

- 7 The routing number (RN) must be nine digits. The first two numbers must be 01 through 12 or 21 through 32.
- 8 The account number (AN) may contain up to 17 alphanumeric characters. Include hyphens, but omit spaces and special symbols. Write the AN from the left, leaving any blank spaces at the right end.
- 9 Check the type of account.
- 10 Date the taxpayer authorizes the payment to be electronically withdrawn.
- 11 Amount of payment the taxpayer authorizes to be electronically withdrawn.
- 12 Name on the checking or savings account.

**Note:** To initiate a payment or refund transaction, the information in this Step must be included within the electronic transmission.

Illinois does not support international ACH transactions. IDOR will only perform direct transactions (e.g., debit, deposit) with financial institutions located within the United States or those not funded by international funds. Electronic payments will not be accepted and refunds will be via paper check.

### IDOR is **not** responsible if a financial institution rejects a direct deposit or electronic funds withdrawal transaction.

Some financial institutions

- may not allow a refund to be deposited into an account if the names on the account are not the same names that appear on the refund. If a direct deposit fails, a paper check will be automatically issued.
- do not allow electronic funds withdrawals from some types of savings accounts. If an electronic funds withdrawal fails, the taxpayer will receive a notice from IDOR that may include penalty and interest.

### Step 4: Taxpayer declaration and signature

The taxpayer **must** check one of the boxes in Step 4, and sign Form IL-8453.

If the ERO changes the electronic Form IL-1040 after the taxpayer has signed Form IL-8453, and the electronic Form IL-1040 has not been transmitted, the taxpayer **must** sign a corrected Form IL-8453 if either of the following applies:

- the net income on Form IL-8453, Step 2, Line 1, differs more than \$50 from the amount on the electronic Form IL-1040, or
- the tax on Form IL-8453, Step 2, Line 2, the tax withheld on Step 2, Line 3, the overpayment on Step 2, Line 4, or the total amount due on Step 2, Line 5, differ from the corresponding amount on the electronic Form IL-1040 by more than \$14.

### Step 5: Electronic return originator (ERO) and paid preparer declaration and signature

Form IL-8453 must be completed and signed by the ERO. If the ERO and the paid preparer are the same entity, the paid preparer box must be checked. When the ERO and paid preparer are different, a copy of Form IL-1040 must be signed by the preparer and attached to the back of Form IL-8453.

**Collector:** If for the purpose of electronic filing, you collected but did not prepare the return, sign as the ERO and date the declaration. Complete the business' information, including the FEIN and telephone number. In this case, no Preparer Tax Identification Number (PTIN) is required.

### Step 6: Attach required documents

Attach to the **front** of Form IL-8453:

- "Copy 2" of all W-2 and 1099 forms (W-2, W-2G, 1099-DIV, 1099-G, 1099-INT, 1099-K, 1099-MISC, 1099-OID, and 1099-R).

Attach to the **back** of Form IL-8453:

- Form IL-1310, Statement of Person Claiming Refund Due a Deceased Taxpayer, if filing a Form IL-1040 on behalf of a deceased taxpayer.

**Note:** Substitute wage and tax statement forms (federal Form 4852 or Illinois Form IL-4852) cannot be attached to Form IL-8453 or submitted later instead of W-2, W-2G, 1099-G, and 1099-R forms. Form IL-1040 returns that include 4852 forms must be filed on a paper Form IL-1040.

