



Substitute Forms Guidelines and Instructions for Form IL-8633-SF 2024

If you produce, or intend to produce, your own version of the official Illinois tax forms, you must follow the instructions provided in this guide. Forms you produce are referred to in this guide as “substitute forms” and include returns, schedules, and payment vouchers. Substitute forms providers may include software developers (primary or secondary), payroll services, forms libraries, independent taxpayers, and other vendors of related services. **NOTE:** Substitute forms that must be submitted to us for review and approval are forms you set up or alter in some way, including the addition of a scan line or bar code.

IMPORTANT: The substitute forms you produce must be processable through the Illinois Department of Revenue (IDOR)’s automated processes. The taxpayer may experience delays or be assessed penalties and interest for filing a form which does not meet our requirements.

Required annual substitute forms process:

1. **Complete Form IL-8633-SF, 2024 Substitute Forms Annual Provider Enrollment, and submit it to us.** Upon receipt and approval of your completed Form IL-8633-SF, we will give you instructions on how to access the draft forms area. You should keep this information confidential.
2. Developers of substitute forms must use the specifications for content and format provided in this guide and in the drafts and examples provided in the “Draft Forms” webpage on our website.
3. Submit all substitute forms developed, by emailing a PDF file to us. Occasionally for technical reasons, we may ask you to mail a paper form to us. Each substitute form must be reviewed, and approved by us. **Most forms require a scan line or 1-D barcode containing taxpayer and other information (see our “Draft Forms” web page for testing specifications)** and must also be tested. Some providers request approval to use 2-D barcodes. On all test forms, the data used should **not** contain “real” or “live” data. Forms received will be reviewed and a response sent within 15 business days. **Note:** Your forms do not need review if your product simply provides an unaltered graphic image (picture) of the IDOR form or a copy printed from our public “Forms” web page at tax.illinois.gov and it does not contain a scan line or 2-D barcode.
4. If we notify you of an error or correction, you must make the correction, notify your customers, and email evidence of the correction to REV.VendorForms@illinois.gov within 10 days of receiving our notice.
5. All correspondence should include your 3-digit vendor ID number assigned after submission of Form IL-8633-SF in the subject line. **Note:** If a form contains a scanline or barcode, do not place the vendor ID in a location that will interfere with the scanline or the barcode.

Submit Form IL-8633-SF and all tax forms for review and testing, and contact us at the following:

Email address: REV.VendorForms@illinois.gov
Phone: 217 524-7794

Mailing address: OFFICE OF PUBLICATIONS MANAGEMENT MC 2-375
ILLINOIS DEPARTMENT OF REVENUE
101 WEST JEFFERSON STREET
SPRINGFIELD IL 62702

General format requirements for substitute forms

Paper

- Use white, unlined paper that is a standard business weight (recommended weight is 20 pound paper).
- Paper size must be the same size as the official forms. Most returns are 8.5 inches wide by 11 inches tall. Vouchers are 8.5 inches wide by 3.625 inches tall.

Margin requirements

There must be at least a .25 or .5 inch margin on all sides of the form or voucher as described in each form’s specifications. There must be a .25 inch band of white space around all sides of the barcodes, anchor points, and scan lines.

Data and layout requirements

Placement of form information and data should be at the location shown on the form samples located in the “Draft Forms” area of our website.

Printing Requirements

Forms and vouchers must be printed full size. Ensure the “shrink to fit” print option is **not** selected. Use black ink for data, scan line, 1-D barcode, and 2-D barcode.

Font

- For taxpayer data, use either Courier or Arial type fonts, size 10-12.
- For the scan line, use “OCR-A Std” font, size 10. All payment vouchers and some returns (Forms IL-941 and ST-1) require a scan line containing taxpayer identification and reporting period information. See each draft example for the contents and placement of the scan line.
- For the IL-1040 2-D barcode, please refer to the tax year specifications and testing requirements found at <https://tax.illinois.gov/taxprofessionals/electronic-transmitters-and-software-developers.html>.
- For the 1-D barcode, use font “Free 3 of 9, Extended,” size 30. Most payment vouchers and forms require a 1-D barcode. See each draft example for the 1-D barcode contents. The 1-D barcode contents should be produced exactly as shown on the draft form. No vendor or taxpayer information is contained in the 1-D barcode.

Ink color

Black ink is required for taxpayer data. No colored ink in the official IDOR form is required to be reproduced; black ink may be substituted.

Shading and logos

Shading and logos are not required to be reproduced. If used, these should not interfere with the required information contained on the form or voucher.

Number formatting

In dollar amount entries, do **not** add the dollar sign. For a zero amount, show 0.00. Complete the cents field with two digits (example: fifty-five dollars and ten cents would show as 55.10). If the amount is a whole dollar amount, print the whole number plus the decimal followed by 00 (example: one hundred dollars would show as 100.00). Do not use default numbers in return lines which require the taxpayer to enter an amount.

Illinois substitute forms vendor identification number

After submitting your Form IL-8633-SF, we will assign a three-digit Illinois substitute forms vendor identification number if you do not already have one. **You must add this identification number to all your substitute Illinois tax forms.**

Anchor Points

Black solid squares are required in each corner of the forms to facilitate imaging equipment. There must be a .25 inch band of white space around all sides of the anchor point. See the substitute forms area on IDOR’s website for more information.

IL-8633-SF Instructions for 2024 Substitute Forms Provider Annual Enrollment

Complete this form if you produce, or intend to produce, paper forms to be filed as a substitute for the official forms from IDOR or if you are a tax professional requesting access to IDOR’s draft forms.

If you use a “forms library product” in your tax software or services, the forms library product must be enrolled and approved prior to your form being approved.

If you are a software developer and the software electronically files the tax information but your product produces a printed tax form, you must complete and submit this form for approval, providing information about your software product.

Upon receipt and approval of your completed Form IL-8633-SF, we will provide you with instructions to access the draft forms area on our website.

This form must be submitted prior to seeking review and approval for any substitute forms.

If this is a **new enrollment**, please complete all Steps of this form, including Page 2.

If this is a **renewal**, please complete all of Step 1, Step 2, and Step 4, and make sure to enter your 3-digit Illinois substitute forms vendor identification number on Line 4.

Form IL-8633-SF Enrollment due date: IDOR will begin accepting Enrollment forms on September 3, 2024. We recommend submitting your enrollment form by the end of October. Enrollment forms received after October 31, 2024, will be accepted, however we will not review any substitute forms until your enrollment is approved.