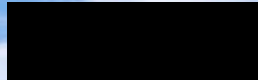


IL Department of Revenue IL-1040 WebFile

Presented

Kevin Richards

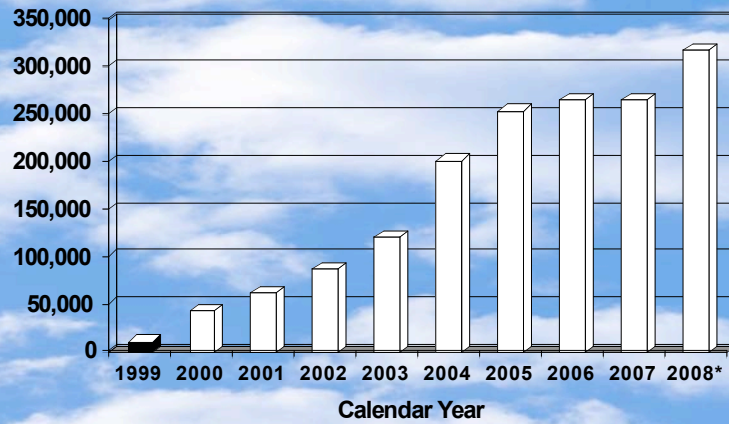
Electronic Commerce Division



History

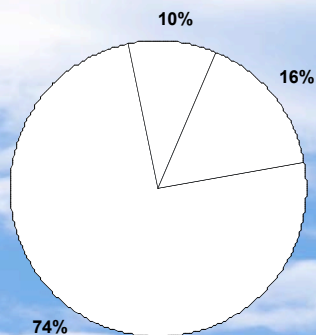
- **Pilot program was limited to 700,000 taxpayers in CY1999.**
- **Started with Interview method, added Fill-in-form method for CY2002.**
- **Developed by in-house staff for more control and easier maintenance including program expansion efforts.**
 - **IS devotes 2 months for year-end maintenance.**

IL-1040 WebFile Growth



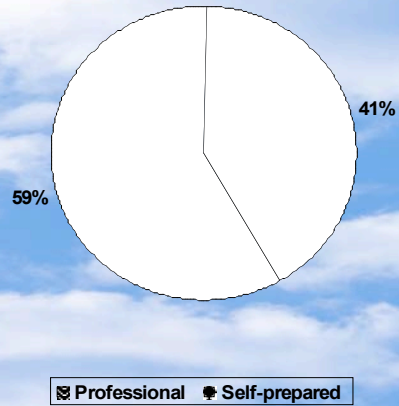
*Through 4/21/08

IL-1040 Electronic Market Share

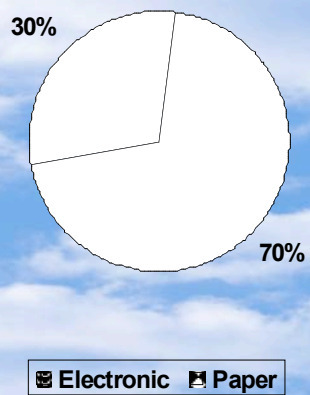


e-File Web File Tax-Prep

Tax Professional vs. Self-prepared IL-1040 Returns



Self-prepared IL-1040 Breakdown



Illinois WebFile Facts

- **Taxpayers can file, deposit and pay electronically through the system.**
- **SSN & IL-PIN or Drivers License Number is used as signature and to access the system.**
- **Taxpayers allowed to print a PDF of their filed return.**

Illinois WebFile Facts

- **In CY2008 55% of taxpayers used the Interview method. In previous years it has been around 50%.**
- **Currently 86% of the refund returns use Direct Deposit.**
- **Currently 70% of balance due returns used Electronic Funds Withdrawal.**
 - **A voucher can be printed & mailed with a check as well.**

Illinois WebFile Facts

- **Security**
 - **SSL**
 - **40 or 128 bit encryption**
 - **Taxpayers are allowed 6 attempts to authenticate with SSN and PIN/DLN before lockout.**

System Enhancements

- **CY1999 – Pilot year**
 - **Simple returns only, limited line entries**
- **CY 2000**
 - **Added direct deposit.**
- **CY2001**
 - **Added most subtractions & credits**
- **CY2002**
 - **Added fill-in-form**

System Enhancements

- **CY2003**
 - **Added electronic funds withdrawal, credit carry forward option, & 1099-R**
- **CY2004**
 - **Removed option to print IL-1040 before filing**
- **CY2005**
 - **Minimal system enhancements**

System Enhancements

- **CY2006**
 - **Started rounding entries instead of truncating**
 - **Added IL-PIN inquiry button within the application**
- **CY2007**
 - **Minimal system enhancements**
- **CY2008**
 - **Added 1099-G w/ IL withholding**
 - **Added first time filers,**
 - **added employer name & address requirements for W-2 entries**
 - **Allowed change in filing status from previous year**
 - **Allowed name changes from what was previously on file.**

Lessons Learned

- **First time filers want to use the program.**
- **Taxpayers want to have the capability of saving the return and filing in a later session.**
- **Allow taxpayers to print a copy of the return only after filing the return.**

Lessons Learned

- **Round the entries for the taxpayers, do not truncate.**
- **Provide verification screens for direct deposit or electronic funds withdrawal entries.**

Homepage

tax.illinois.gov
Rod R. Blagojevich, Governor

ILLINOIS REVENUE

SEARCH

Quick Links
IL-1040 Web File
Forms / Publications
Laws / Regs / Rulings
Tax Rate Finder

Information For
Businesses
Individuals
Local Governments
Property Tax
Non-Profit Orgs.
Charity Gaming
Motor Fuel
Tax Professionals

About IDOR
What we do
Contact Us
Tax Stats
Site Map

Questions?
Get Answers!

Businesses • Tax Professionals • Individuals

Make life less taxing.
file electronically

Click here to file your IL-1040

Illinois eServices
Make life less taxing.

For Individuals...
For Businesses...
Other e-Services

Current Focus
Gov. Blagojevich moves agenda
Illinoisans to Go Green, file
Returns electronically
CHICAGO - Illinois Department of
Revenue says filing electronically
saves paper, increases
processing efficiencies...**MORE**

Rev-e-News
July 2008 Ordinance
Changes Pending
Property Tax Task Force
First-time Filers
New Property Tax Relief
By Refund
• Refund Status
New Exemption under SB
783
New Tax Computer System
Delinquent Taxpayer List
FY 2008 Estimate for
Replacement Taxes
Provena Hospital Decision
Cook County 7% Study
Press Releases

Copyright © 2008 AMER Amd | Missing Aids | Privacy Policy | Help Private | Web Accessibility | Webmaster

Welcome Screen

Illinois eServices **IL-1040 Web File**

Welcome

Welcome to IL-1040 Web File

IL-1040 web file is available for Illinois residents and is a quick and easy way to file your IL-1040, Illinois Individual Income Tax Return.

If you have your Illinois Personal Identification Number (IL-PIN), then you may be able to IL-1040 web file your Illinois Income Tax Return anytime from January 11 through October 15, 2008.

Your IL-PIN is available on the postcard or in the 2007 IL-1040 booklet you received in the mail. If you did not receive a postcard or a booklet in the mail, call 1 800 732-8866 or [click here](#) to see if an IL-PIN has been assigned to you. If you do not have a filing history within the last two years and no IL-PIN was assigned, you may still file your return through web file if you have a valid drivers license or state ID card issued by the Illinois Secretary of State.

To see if you are eligible or for more information about IL-1040 web file, refer to the questions at the bottom. We recommend you read the frequently asked questions before you get started and encourage you to file early. The month of April is an extremely busy time on our web site.

[Am I eligible to file my IL-1040 return using IL-1040 web file?](#) [What do I need to view or print my return?](#) [Is IL-1040 web file secure?](#) [What do I need before I begin to IL-1040 web file?](#) [What are the most frequently asked questions?](#)


Click "Start Filing" if you

- are ready to file your return;
- wish to continue a return you have already started; or
- wish to print a copy of a return you have already filed

(note: you will need your confirmation number to access your filed return).

Start Filing **Exit**

Withholding Screen

 **IL-1040 Web File**

▶▶▶ If you have any W-2, W-2G, 1099-G, or 1099-R forms (that have Illinois Income Tax withholding shown on them) or any military W-2 forms, please enter the information from these forms now. Income reported on forms 1099-G and 1099-MISC should already be included in your adjusted gross income and does not have to be added back separately.

Withholding

Step 2: Enter information from each W-2, W-2G, 1099-G, or 1099-R form by clicking the appropriate "Add" button below. If you have multiple forms (e.g., three W-2 forms) you will enter the information from each form, one at a time.
Note: You do not have to enter income information from other forms such as a 1099-MISC, etc.


<input type="button" value="Add"/>	W-2	<input type="button" value="Add"/>	Military W-2
<input type="button" value="Add"/>	W-2G	<input type="button" value="Add"/>	1099-R
<input type="button" value="Add"/>	1099-G		

When all of your withholding information has been entered, or if you have no withholding information to enter, click an "Accept" button below to continue.

[E-mail Help](#)

This tax information is not yet filed as a return.

Interview Screen

 **IL-1040 Web File**


Income

Step 3: Enter the following income information. When you enter money amounts, round to the nearest whole dollar.

1 Enter your federal adjusted gross income from your

- ▶ U.S.1040, Line 37,
- ▶ U.S.1040A, Line 21, or
- ▶ U.S.1040EZ, Line 4.

If your federal adjusted gross income is a negative amount, place a minus sign in front or in back of the dollar value (e.g., -5000, 5000-).

2 Click the box if at least two-thirds of your total federal gross income came from farming. 

3 Enter your federally tax-exempt interest and dividend income from your U.S. 1040 or U.S. 1040A, Line 8b; or U.S. 1040EZ.

4 When all information has been entered, click an "Accept" button below.

[E-mail Help](#)

This tax information is not yet filed as a return.

Fill-in Screen



IL-1040 Web File

▶ Helpful hints before you get started - There are "Calc" arrows throughout the screen and a "Calculate" button at the bottom of the screen. You can use these buttons to calculate your return at any point during your IL-1040 web file session. Also, if you need help completing an entry, line-by-line instructions are available by clicking on the blue line number link located by that entry.

Page One

Illinois Department of Revenue
2007 Form IL-1040
Individual Income Tax Return

Step 1: Personal Information

A Your Social Security numbers.

003-01-0372

Your Social Security number

Your spouse's Social Security number

B Enter your personal information below.

Your First Name

Middle Initial

Last Name

State

City

ZIP

State (select)

C Your filing status.

Single or head of household

Married filing separately

Married filing jointly

Widowed

Step 2: Income

1 Enter your federal adjusted gross income from your U.S. 1040, Line 37, U.S. 1040A, Line 21, or U.S. 1040EZ, Line 4.

1

0

2 Enter your federally tax-exempt interest and dividend income from your U.S. 1040 or 1040A, Line 8b, or U.S. 1040EZ.

2

0

Confirmation Screen



IL-1040 Web File

▶ Your return has been filed through IL-1040 web file.

Confirmation

The Illinois Department of Revenue confirms receipt of your filed IL-1040 return. The confirmation number below is your proof of filing. Write this number down **NOW** or choose the print command from your browser menu to print this page.

Confirmation Number: 081IF000000173

You will need to refer to this number when communicating with the department about your return or to access your filed return through this program.

MINNIE MOUSE
C/O
101 W JEFFERSON
SPRINGFIELD, IL 62702

Your tax year: 2007



To print a copy of your filed return, click the "Print Preview" button below.
If you owe tax, complete payment details will be provided when you click the "Exit" button.

If you cannot print your return, you may request a copy of your filed return by completing Form IL-4506, Request for Copy of Tax Return. There is a \$5 charge for each copy and an additional \$5 charge if you want the document certified. To obtain a Form IL-4506,

▶ visit our main web site by exiting this system, or
▶ call our 24-hour Forms Order Line at 1 800 356-6302.

[E-mail](#)

Print
Preview

Exit

Exit Screen

IL-1040 Web File

▶▶▶ Your return has been filed through IL-1040 web file.

Exit

Thank you for using IL-1040 web file to file your Illinois Income Tax Return!

1 You should have

- ▶ written down the amount you owe and your confirmation number, or
- ▶ printed a copy of your return.

If you did not print a copy of your return, you may log back into the system and use the confirmation number to access your filed return, or you may request a copy of your return by completing Form IL-4526. To obtain a Form IL-4506, visit our main web site by exiting this system or call our 24-hour Forms Order Line at 1-800-356-8303.

2 If you owe additional tax, your payment is due by April 15, 2008. You may pay the tax you owe by electronic funds withdrawal, credit card, or check.

- ▶ If you did not choose the electronic funds withdrawal option during your filing session but would like to pay by electronically withdrawing from your checking or savings account, visit our web site at tax.illinois.gov.
- ▶ To pay by Visa, MasterCard, Discover, or American Express, visit www.officeliquidations.com, or call 1-800-2PAY7242 (1-800-272-9870). Be sure you have your credit card ready. If you pay by telephone you will be asked to enter a Jurisdiction Code. The Jurisdiction Code is 2309. There will be an additional convenience fee assessed to your credit card account by the credit card service provider.
- ▶ To pay by check or money order, make your check payable to "Illinois Department of Revenue" and write your Social Security number(s) in the lower left corner of your payment. Mail your payment along with a completed IL-1040-V, Payment Voucher for Individual Income Tax, to Illinois Department of Revenue, Springfield, Illinois 62726-0001. Click the "Payment Voucher" button below to access and print the voucher.

DO NOT mail us a printed copy of your IL-1040. Keep this copy along with your W-2s, W-20s, and 1099s with your tax records.

DO NOT file again using another method (i.e., electronically, paper IL-1040).

You must click the "Good-bye" button to properly exit the system.

[E-mail](#)

Taxpayer Feedback

- **Great! First year I'm trying e-file and it was EASY!!! Thank you for making such a simple-to-use site.**
- **This is great... excellent example of governments use of technology.**