



Arizona Department of Revenue

Individual Income Update

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March 2024

E-FILE YOUR RETURN

E-file is a cooperative tax filing program with the IRS that makes it possible for taxpayers to file both federal and state income tax returns electronically. Taxpayers receive an acknowledgement of receipt from both the IRS and ADOR by email from the software company, so they will know their returns have been received and accepted. Online filing is secure. The information is encrypted and securely transmitted to the IRS and ADOR.

Electronic filing is:

- Fast: Receive your refunds up to six times as fast as paper return filers.
- Accurate: Fewer errors than paper forms.
- Affordable: If you qualify, it's free.
- Paperless: Help the environment by reducing paper usage.

The benefits of filing electronically include:

- E-File and e-pay in a single step.
- E-File early and schedule an electronic payment at the same time for withdrawal from a bank account on a future date. For instance, a taxpayer may prepare and e-file a return in March and schedule the electronic withdrawal prior to the April due date.

PAYING TAXES ELECTRONICALLY

In addition to filing a return electronically, taxpayers can pay their tax due electronically. All you need for an electronic funds withdrawal is the checking and savings account number and the routing transit number for the financial institution.

The benefits of paying electronically include:

- Payment information will only be used for the tax payment(s) authorized by a taxpayer. No unauthorized withdrawals will be made.
- E-Pay is free. No need for paper checks or cash. Although there are no service charges for e-check, taxpayers may want to verify with their financial institution about any fees it may charge. Surcharge may apply for credit/debit cards.

DIRECT DEPOSIT OF REFUND

Choose to direct deposit your refund and receive it directly into your bank account or other financial institution (such as a mutual fund, brokerage firm, or credit union) instead of sending you a check.

Why use Direct Deposit?

- Fast. Receive the refund in your account within two business days of process and approval - even faster if e-filed! Paper refunds are mailed within three business days after approval, plus mail delivery time, plus a trip to the bank can equal a week later.
- More secure. There is no check to get lost.
- Convenient. No trip to the bank to deposit your check.
- Saves tax dollars. A refund by direct deposit costs less to process than a check.
- Free. No cost for direct deposit.
- Flexible. Available whether the return is filed electronically or by paper.



(602) 255-3381 or toll-free at (800) 352-4090



www.azdor.gov



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Please note, ADOR's system marks when a direct deposit has been sent to your bank, but it is the bank's processing system that determine when you will see the refund in your account. If your bank account rejects the deposit, ADOR will send you a check.

Free Tax Preparation and Filing

FREE FILE SOFTWARE

[Free File Alliance](#) is a nonprofit coalition of industry-leading tax software companies partnered with ADOR and the IRS to provide free electronic tax services. Free File is fast, safe, and a free way to do your tax return online.

Individuals who meet certain criteria can get assistance with income tax filing. Check out the ADOR website for free file partners.

1. Review the offers from the vendors listed by clicking on their logo.
2. Follow the (logo) Free File link since another entry to the website may cause a charge for the filing.
3. Select a vendor and begin a return on the website.

Electronic filing is:

- **Fast:** Up to seven times faster processing of your refund and money in your account sooner.
- **Accurate:** Fewer errors than paper forms.
- **Paperless:** Help the environment by reducing paper usage.

The Arizona Department of Revenue does not endorse any specific tax filing product. Any questions regarding software issues or availability of forms should be directed to the software company.

FILLABLE FORMS

The Arizona Department of Revenue **discontinued the calculating 2D Barcode program** for tax year 2023 filed in 2024 and beyond.

We strongly recommend filing electronically to reduce mistakes and include all the documents needed to file an accurate return. You may pick from dozens of approved vendors to file the return, and possibly for free. To check out if you qualify to file for free, see "[Free Electronic Filing for Individuals.](#)"

If you choose to file by paper, we do offer *fillable non-calculating returns* under our Forms page. If you are above the Free File Alliance Adjusted Gross Income threshold, fillable forms are the fastest way to file a paper state individual income tax return. You can download the fillable form and type the information, instead of handwriting the return and possibly delaying the process as ADOR staff decipher the handwriting.

If you choose fillable forms as your free file option, you should be comfortable doing your own taxes. Limitations with fillable forms include:

- It won't give you guidance about which forms to use or help with your tax situation.
- It doesn't provide error checking as it is simple typing in your information into the PDF return.
- It does not automatically add the necessary schedules, forms, and documents to your return.
- It does not transmit to the Department and you must print the return, put the return into an envelope, and ensure you provide enough postage.

See instructions for line-by-line guidance.





AARP TAX-AIDE

The [AARP Foundation Tax-Aide Program](#) offers free assistance to individuals 50 and older, who can't afford a tax preparation service, to file federal and Arizona state returns. Visit the AARP Tax-Aide website for more information.

VOLUNTEER INCOME TAX ASSISTANCE (VITA)

The [VITA Program](#) provides free tax help to people who generally make \$64,000 or less, persons with disabilities, and limited English speaking taxpayers. Visit the IRS website for more information on VITA.

211 INFORMATION

For free, local federal and state tax preparation locations for taxpayers who are elderly, disabled, or low income, visit www.211arizona.org.

Direct File

We are launching the much-anticipated Direct File with the IRS and Code for America on March 12.

The IRS Direct File Pilot Program, a first-of-its-kind project will allow eligible Arizonans to file their state and federal returns for FREE directly through the [IRS Direct File Pilot Program](#).

While the IRS Direct File program is for federal returns only, Arizona chose to join the pilot program, providing a service that integrates state tax filing with IRS Direct File, a major step in creating a seamless federal-state system.

Once taxpayers have finished the federal return using Direct File, they will be given an option to e-file their state tax return through the platform. Eligibility to participate in the Direct File pilot is limited.

It is likely you will be eligible to use both tools if:

- You lived in Arizona for all of 2023 and do not have income from another state.
- Your only income sources are wages, Social Security benefits, unemployment benefits, and/or up to \$1,500 of interest.
- You want to claim the Earned Income Tax Credit, Child Tax Credit, or Credit for Other Dependents.
- You do NOT have self-employment income, including gig or contract work income.
- You did NOT receive the Arizona Families Tax Rebate in 2023.
- You do NOT want to claim the Premium Tax Credit, the Child and Dependent Care Credit, or the American Opportunity Tax Credit or other educational credits.

Sign up to be alerted when Direct File opens to the public on the [IRS' website](#).

