

# COMPLETING THE 2022 IOWA 1040 FORM

## Filing Deadline is May 1, 2023

If...

- You are **married and have no children**, and
- Both you and your spouse worked **only** in Iowa during 2022, and
- You earned only wages and interest, and
- The amount in Box 1 of all the 2022 Form(s) W-2 issued to you and your spouse combined is **more** than \$13,500....

*You may save some tax dollars by following these instructions...*

Go to this site: [https://tax.iowa.gov/sites/default/files/2023-01/IA1040\\_2022\\_UF\\_PR04.pdf](https://tax.iowa.gov/sites/default/files/2023-01/IA1040_2022_UF_PR04.pdf)

Follow the instructions on that page to download the form in Adobe.

**Note that this form will fill in some information automatically and do all the calculations for you. The steps listed below correspond to the 2022 IA 1040 Iowa Individual Income Tax Return form.**

### STEP 1:

- Tab through the fields to enter your and your spouse's names, address, and Social Security Numbers in the spaces provided

### STEP 2:

- Put an X in the box beside "Married filing separately on this combined return"
- If you lived in Ames on December 31, 2022, select Story County (#85) as your Residence and the Ames School District (#0225)

### STEP 5:

- Enter the amount from Box 1 of your Form(s) W-2 on Line 1, Column A. Enter the amount from Box 2 of your spouse's Form(s) W-2 on Line 1, Column B.

### STEP 7:

- If you filed an Iowa tax return for 2021 and deducted Federal income tax withheld (refer to your 2021 Iowa tax return, Line 31), then received a refund of all or part of that federal tax from the U.S. government during 2022, enter the amount of the refund you received from the U.S. government on line 27. If you and your spouse filed a joint Iowa return for 2021, divide the 2021 federal refund amount between the spouses according to the ratio of your net

incomes for 2021. Enter your portion of the refund on Line 27, Column A and your spouse's portion on Line 27, Column B.

- Enter the amount from Box 2 of your Form(s) W-2 in Column A on line 31. Enter the amount from Box 2 of your spouse's Form(s) W-2 in Column B on line 31.

**STEP 8:**

- Put an X in the "standard" box on Line 37 to claim the \$2,210 per spouse standard deduction.

**STEP 9:**

- If you wish to contribute money to any of the projects shown on Line 57, enter the amount of your contribution on the appropriate line. Remember, these contributions will reduce your refund or increase the amount you must pay.

**STEP 10:**

- Enter the amount from Box 17 of your W-2 form(s) on Line 63, Column A. Enter the amount from Box 17 of your spouse's W-2 form(s) on Line 63, Column B.

**STEP 11:**

- If Line 68 shows a refund of tax, complete Lines 68a through 68c to set up a direct deposit of your refund into your bank account.

**STEP 13:**

- Enter today's date and your telephone number in the spaces provided.
- Print a copy of your form by clicking on the green "PRINT" button at the top of Page 1 of the IA 1040 Form.
- Sign the printed copy on the line marked "Your Signature" at the bottom of the second page. Your spouse must sign on the "Spouse's Signature" line.

**MAILING:**

- **Make a photocopy of your signed form** and keep that copy for at least 3 years. You will need this copy to file your 2023 tax return.
- Enclose Copy 2 of your Form(s) W-2.

- If your form shows a **refund** due on Line 68, mail your completed form in a regular envelope with a first-class stamp to:

Iowa Income Tax Document Processing  
PO Box 9187  
Des Moines IA 50306-9187

**NOTE:** If you do not elect direct deposit for your refund, it may take several months for a paper refund check to be mailed to you at the address you provided in Step 1. Be sure to use an address where your refund check will reach you.

If your form shows that you **owe** additional tax for 2022 on Line 73

- You may e-pay at <https://tax.iowa.gov/easypayiowa> and select “Individual Income Tax” in the “What do you want to pay?” box
- If you pay by check, write your social security number(s) on the check and complete the Payment Voucher found here:  
<https://tax.iowa.gov/sites/default/files/2022-09/IA1040V%2841137%29.pdf>
- Enclose your check and payment voucher with your tax form
- Mail your completed form in a regular envelope with a first-class stamp to:

Iowa Department of Revenue  
P.O. Box 9187  
Des Moines, Iowa 50306-9187