



Key points to keep in mind when filing 2022 tax returns

IR-2023-17, Jan. 31, 2023

WASHINGTON — To help taxpayers navigate the beginning of the tax filing season, the Internal Revenue Service today offered a checklist of reminders for people as they prepare to file their 2022 tax returns.

From gathering paperwork to filing a tax return, these easy steps will make tax preparation smoother in 2023:

1. Gather tax paperwork and records for accuracy to avoid missing a deduction or credit.

Taxpayers should have all their [important and necessary documents](#) before preparing their return. This helps people file a complete and accurate tax return. [Errors and omissions](#) slow down tax processing, including refund times.

Some information taxpayers need before they begin includes:

- Social Security numbers for everyone listed on the tax return,
- Bank account and routing numbers,
- Various tax forms such as W-2s, 1099s, 1098s and other income documents or records of digital asset transactions,
- Form 1095-A, Health Insurance Marketplace statement,
- Any IRS letters citing an amount received for a certain tax deduction or credit.

2. Remember to report all types of income on the tax return. This is important to avoid receiving a notice or a bill from the IRS. Don't forget to include income from:

- Goods created and sold on online platforms,
- Investment income,
- Part-time or seasonal work,
- Self-employment or other business activities,
- Services provided through mobile apps.

3. File electronically with [direct deposit](#) to avoid delays in receiving a refund. Avoid paper returns. Tax software helps individuals avoid mistakes by doing the math. It guides people through each section of their tax return using a question-and-answer format.

For those waiting on their 2021 tax return to be processed, here's a special tip to ensure their 2022 tax return is accepted by the IRS for processing. Make sure to enter \$0 (zero dollars) for last year's adjusted gross income (AGI) on the 2022 tax return. Everyone else should enter their prior year's AGI from last year's return.



- 4. Free resources are available to help eligible taxpayers file online. Free help may also be available to qualified taxpayers.** [IRS Free File](#) provides a free online alternative to filing a paper tax return. IRS Free File is available to any individual or family who earned \$73,000 or less in 2022.

With IRS Free File, leading tax software providers make their online products available for free as part of a 21-year partnership with the IRS. This year, there are seven products in English and one in Spanish. Taxpayers must access these products through the [IRS website](#).

People who make over \$73,000 can use the IRS' [Free File Fillable Forms](#). These are the electronic version of IRS paper forms. This product is best for people who are comfortable preparing their own taxes.

Qualified taxpayers can also find free one-on-one tax preparation help around the nation through the [Volunteer Income Tax Assistance \(VITA\) and Tax Counseling for the Elderly \(TCE\) programs](#).

- 5. Choose a tax professional carefully.** Most tax return preparers are professional, honest and provide excellent service to their clients. However, dishonest tax return preparers who file false income tax returns do exist. The IRS has a [Directory of Federal Tax Return Preparers with Credentials and Select Qualifications](#) and more on [choosing a tax pro](#) on IRS.gov.
- 6. Avoid phone delays; use online resources before calling the IRS.** To avoid waiting on hold, the IRS urges people to use IRS.gov to [get answers to tax questions](#), [check a refund status](#) or [pay taxes](#). There's no wait time or appointment needed — [online tools](#) and resources are available 24 hours a day. The IRS' [Interactive Tax Assistant tool](#) and [Let Us Help You](#) resources are especially helpful.

Additionally, the IRS suggests taxpayers stay up to date on important tax information online by:

- Following the [IRS' official social media accounts](#) and [email subscription lists](#) to stay current on the latest tax topics and alerts.
- Downloading the [IRS2Go mobile app](#), watching [IRS YouTube videos](#), or following the IRS on Twitter, Facebook, LinkedIn and Instagram for the latest updates on tax changes, scam alerts, initiatives, products and services.