

Benefit Access Application- Reference Sheet

Important Contacts

Name	Contact	Notes
IDOA – Phone Line	1-800-252-8966 option 3	Have client’s SSN ready when you call
IDOA- Email	Aging.ILSenior@illinois.gov	Do not email client’s SSN. Email BAA application number and client DOB
RTA	312-913-3110	
Benefit Access Number	https://apps.ilsos.gov/bansearch/	Need last name, zip, and last 4 of ssn
BAA Refund Request	https://apps.ilsos.gov/bap/	Need Benefit Access Number and IL License Plate Number

Income Limits

Household	Income Limit	Notes
Individual	\$33,562.00 <i>from the past tax year</i>	
Married Couple	\$44,533.00 <i>from the past tax year</i>	<ul style="list-style-type: none"> • Married Couples living together must apply together • Married couples who are separated may need to prove they live separately
At least one Qualified Additional Resident	\$55,500.00 <i>from the past tax year</i>	Qualified Additional Residents (QAR): <ul style="list-style-type: none"> • Must live in the home • Applicant must financially support this person • Can not get their own BAA benefit • Maximum of two per application

Commonly requested Documents for BAAs.

- **1040 Tax forms:** Must be from the correct tax year.
- **1099 Tax Forms:** Must be from the correct tax year. You must **always** submit a pension 1099R if the client has a pension.
- **Non-filing tax form:** Submit this if they request a 1040 tax form but the person doesn't file taxes. Can replace a Social Security 1099, but not a pension 1099.
- **Proof of Disability-** You can provide proof of disability 1 of 3 ways:
 1. **A statement from Social Security, Railroad Retirement, the VA (100% disability), or Civil Service that shows they've been disabled since the last tax year.**
 2. **A state ID with "Disabled" Status**
 3. **A signed Physicians statement.** If the client does not have Social Security Disability/ Railroad retirement, OR if they cannot obtain the statement that shows they've been disabled during the correct tax year, **they can have a doctor complete a signed Physician's Statement.**
 - The statement must show that they have been disabled during the appropriate tax year.
 - Physician's handwriting must be legible.
- **Proof of Age-** Submit ID
- **Proof of SSN-** Submit a copy of the client's social security card. They usually only ask for this if the SSN was typed in incorrectly.

Call the IDOA at 800) 252-8966, option 0, option 3 or email Aging.ILSenior@illinois.gov if you ever have a question about a document you are required to submit

How to Read a 1040 Cont..

Income					
1a	Total amount from Form(s) W-2, box 1 (see instructions)	1a			
b	Household employee wages not reported on Form(s) W-2	1b			
c	Tip income not reported on line 1a (see instructions)	1c			
d	Medicaid waiver payments not reported on Form(s) W-2 (see instructions)	1d			
e	Taxable dependent care benefits from Form 2441, line 26	1e			
f	Employer-provided adoption benefits from Form 8839, line 29	1f			
g	Wages from Form 8919, line 6	1g			
h	Other earned income (see instructions)	1h			
i	Nontaxable combat pay election (see instructions)	1i			
z	Add lines 1a through 1h	1z			
2a	Tax-exempt interest	2a		b	Taxable interest
3a	Qualified dividends	3a		b	Ordinary dividends
4a	IRA distributions	4a		b	Taxable amount
5a	Pensions and annuities	5a		b	Taxable amount
6a	Social security benefits	6a		b	Taxable amount
c	If you elect to use the lump-sum election method, check here (see instructions)				
7	Capital gain or (loss). Attach Schedule D if required. If not required, check here	7			
8	Other income from Schedule 1, line 10	8			
9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income	9			
10	Adjustments to income from Schedule 1, line 26	10			
11	Subtract line 10 from line 9. This is your adjusted gross income	11			
12	Standard deduction or itemized deductions (from Schedule A)	12			
13	Qualified business income deduction from Form 8995 or Form 8995-A	13			
14	Add lines 12 and 13	14			
15	Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income	15			

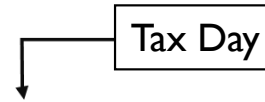
For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 11320B Form 1040 (2022)

When calculating income, IDOA will add all this together:

- The higher \$ of either 2a or 2b
- The higher \$ of either 3a or 3b
- Line 4b,
- Line 5*
- Line 6a, 7, 8, and 9
- For Line 5 (pensions & annuities combined):
- They need 100% of the annuity, and the taxable portion of the pension
- This is why the IDOA needs copies the pension 1099s, even if the pension income is listed on the client's 1040

BAA 2024 Tax Year Calendar

Tax Day



January 2024	February 2024	March 2024	April 2024	April 2024	May 2024	June 2024
2022 tax year	2022 tax year	2022 tax year	2022 tax year	2023 tax year	2023 tax year	2023 tax year
July 2024	August 2024	September 2024	October 2024	November 2024	December 2024	
2023 tax year	2023 tax year	2023 tax year	2023 tax year	2023 tax year	2023 tax year	2023 tax year

