

# MyDec Help

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## **General use information**

### **Install Adobe Reader**

You are not required to install any software.

However, you do have the option to print copies of your Declarations and Real Estate Tax Stamps (for authorized settlement agencies only). If you wish to print Declarations or Real Estate Tax Stamps, you will need to have Adobe Reader installed on your computer. [Click here to download the latest version of Adobe Reader.](#)

*Related items:* [Which browsers can I use?](#) [How do I determine which browser I am using?](#) [How do I change my browser font size?](#) [How do I enable pop-ups in my browser?](#)

### **Enable Pop-ups in My Browser**

Some actions require pop-ups to be enabled in your browser. For example, printing a Declaration or Real Estate Tax Stamp will require a new browser window to open. Clicking the Help hyperlink also opens a new browser window. To allow pop-ups, locate your browser in the list below and follow the instructions.

#### **INTERNET EXPLORER**

Select the Tools menu and click Internet Options. Select the Privacy tab. In the Pop-up Blocker section, click Settings. In the Address of website to allow field, type the URL for the website, then click Add.

#### **FIREFOX**

Click the Firefox menu button in the upper-left corner of Firefox and select Options from the menu. Click the Content button, then click the Exceptions... button next to the Block pop-up windows check box. In the Address of web site field, type the URL for the website, then click Allow.

#### **CHROME**

To the right of your browser's address bar, select the Wrench and select Options from the menu. Click the Under the Hood tab and select the Content Settings button. In the Pop-ups section of the list, click the Manage Exceptions button. In the available field, type the URL for the website and make sure the drop-down menu to the right shows Allow, then press Enter on your keyboard.

*Related items:* [Which browsers can I use?](#) [How do I determine which browser I am using?](#) [How do I change my browser font size?](#) [How do I install Adobe Reader?](#)

## Determine Your Current Browser

To determine which browser you are currently using, click **Help** in the browser toolbar. You will see a menu option that starts with "About..." Click this menu option. You will generally see the type and version of browser here.

*Related items:* [Which browsers can I use?](#) [How do I change my browser font size?](#) [How do I install Adobe Reader?](#) [How do I enable pop-ups in my browser?](#)

## Change Browser Font Size

In some browsers, you may be able to change the font size on your screen. If your browser supports this functionality, you can press and hold down the **Ctrl** key and then use the scroll wheel on your mouse to adjust the font size on your screen.

*Related items:* [Which browsers can I use?](#) [How do I install Adobe Reader?](#) [How do I enable pop-ups in my browser?](#) [How do I determine which browser I am using?](#)

## Browsers that You Can Use

You can use the following browsers to access the web site:

- Internet Explorer 8.0 and higher
- Firefox 3.0 and higher
- Chrome 11.0 and higher
- Safari 4.0 and higher
- Opera 10.0 and higher.

**Note:** Netscape is not supported.

These are the minimum browser versions necessary to support all of the features and functions. If you need to upgrade your browser, please go to the appropriate browser web site to download the latest version.

*Related items:* [How do I change my browser font size?](#) [How do I install Adobe Reader?](#) [How do I enable pop-ups in my browser?](#) [How do I determine which browser I am using?](#)

## Field Color Descriptions

In a window, each field has a background color. That color provides important information regarding what you can (or cannot) enter into that field.

Color	Meaning	Description
White	Default	<p>The field is in inquiry or view-only mode and does not currently accept data entry.</p> <p>Examples of view-only fields could be:</p> <ul style="list-style-type: none"><li>• A <i>fixed value</i> that can only be assigned by the system, such as an <i>Account ID</i>.</li><li>• The field is calculated from other fields and you cannot directly change the value in the field. Edits may be made in one or all of the fields that comprise the calculation.</li><li>• In an existing Declaration, a value that is not currently editable. However, certain non-editable fields can become editable when you click the <b>Change</b> hyperlink at the top of the screen (or other buttons that enable modification to individual fields).</li></ul>
Red	Error	<p>The information entered in this field does not meet a requirement and so the field is in error.</p> <p><b>Note:</b> When you move your cursor over a field in-error, TipText is displayed that provides a short message describing the error condition.</p>
Yellow	Required	<p>The field is mandatory. You <b>must</b> enter a value in this field before you can save the record. If yellow fields are not completed, the record will not save.</p>
Green	User-enabled	<p>The field is optional. You may enter a value in this field, but it is not mandatory. Green fields do not require completion in order to save the record.</p>

*Related items:* [Use the menu bar](#) [Use tabs in section headers](#) [Use keyboard shortcuts](#)  
[Sort lists using column headings](#)

## Filter Lists

Some lists can be filtered to narrow down the information displayed in the list. If you see the word **Filter** in a section title bar, then you can filter that list.

To filter a list, click the Filter hyperlink in the section title bar. A green filter field is displayed at the top of the list. To narrow down the contents of the list, type a word or a portion of a word into the filter field and press the **Enter** key on your keyboard. The list only displays rows containing the word or portion of a word that you typed.

To remove the filter from the list and display all of the list items, either click the close  button at the right end of the filter field or delete the contents of the filter field and press **Enter** on your keyboard again.

*Related items:* [Understand field colors](#) [Use tabs in section headers](#) [Use keyboard shortcuts](#) [Sort lists using column headings](#)

## Use Tabs in Section Headers

Some sections contain headers that offer multiple viewing options.

When you see a header that has multiple labels, each of those labels is a tab. Each tab can have one or more sub-tabs. When you click a tab or sub-tab, the section displays information described by the tab label.

For example, you may see a section header that looks like the following:



In this example, the section is showing *Declarations* that *need attention* (Accepted, Closed, or stamps issued, as applicable), as indicated by the **Declarations** tab and the **Attention Needed** sub-tab that are currently selected. You can click any of the other sub-tabs to view the information described or any of the other tabs to view a different set of sub-tabs. For example, you can click the **Messages** tab to see messages awaiting your attention.

## Use the Menu Bar

The menu bar is displayed on the left side of the window. It contains options that help you navigate and perform actions. To select an option from the menu, click the appropriate [hyperlink](#).

You will likely see some of the following options in the top portion of the menu bar, labeled **Menu**:

- **Home** - Click to return to the main screen.
- **Back** - Click to return to the last window you viewed.
- **Log Off** - Click to log off.

Additional options in the menu depend on which window you are currently viewing.

Related items: [Use tabs in section headers](#) [Use keyboard shortcuts](#) [Sort lists using column headings](#)

## Use Keyboard Shortcuts

If you prefer to use the keyboard rather than the mouse, there are several keyboard shortcuts that are available.

Shortcut	Result
<b>Tab</b> key	Move forward from the current field to the next one in the window.
<b>Shift + Tab</b>	Move to the previous field in the window.
Enter the first letter	When you are selecting an item from a <a href="#">drop-down menu</a> , type the first letter of the item you want. When you do this, MyDec automatically selects the first entry in the menu that begins with that letter. (Press the down arrow key to move to any subsequent entries that begin with that letter.)
<b>Alt + left-arrow</b> key	Returns you to the last window you visited. You can press this key combination multiple times to move several windows back through the sequence of windows you have visited. (This key combination performs the same action as the <b>Back</b> option in the menu bar.)

Related items: [Use the menu bar](#) [Use tabs in section headers](#) [Sort lists using column headings](#)

## Sort Lists Using Column Headings

Certain sections organize lists beneath distinct column headers. The area outlined in red in the image below shows an example of this type of column header. Lists containing this type of column header can be sorted and arranged to aid you in organizing the list information in a useful way.

To sort the items in a list in alphanumerical order by a particular column, click that column header name.

DECLARATIONS NEEDING ATTENTION							Filter
Primary PIN	Declaration ID	Address	Buyer Last Name	Seller Last Name	Escrow #	Status	Last Activity
08-31-276-048-0390	20140501128	9511 HARRISON AVE DES PLAINES, IL 60016-1563	BROWN	STATE	14894	Declaration Submitted	5/8/2014
76-04-351-404-0071	20140501600127	100 W RANDOLPH ST CHICAGO, IL 60601-3274	BUYER	SELLER	6541-48	Declaration Submitted	5/8/2014

Related items: [Use keyboard shortcuts](#) [Use the menu bar](#) [Use tabs in section headers](#)

## Use the I Want To... Menu

The **I want to...** menu is displayed at the top of the Customer Summary and Profile pages.

The options in this menu describe actions you would most likely want to perform based on your access type.

These options change depending on which window you are on.

To select an option from the menu, click the appropriate [hyperlink](#).

If the action you wish to perform is not listed in the **I want to...** menu, you can navigate to another logical window and view the **I want to...** menu there or you can search the online help.

*Related items:* [Use the action bar?](#) [Use the breadcrumb trail?](#) [Understand field colors](#) [Use tabs in section headers](#) [Use keyboard shortcuts](#) [Use the Actions menu](#)

## Use the Actions Menu

The **Actions** menu is displayed on the left navigation column of most windows when viewing Declarations that have been submitted.

The options in this menu describe actions you would most likely want to perform from the current window.

These options change depending on the status of the Declaration you are viewing.

To select an option from the menu, click the appropriate [hyperlink](#).

*Related items:* [Use the action bar?](#) [Use the breadcrumb trail?](#) [Understand field colors](#) [Use tabs in section headers](#) [Use keyboard shortcuts](#)

## Customer Summary Details

This window shows you a summary of your MyDec account.

### DECLARATIONS TAB

This tab displays Declaration information for the account. Declarations may be displayed in one or more sub-tabs.

### ATTENTION NEEDED SUB-TAB

This tab displays a list of Declarations needing attention (waiting to be accepted, closed, or have stamps issued, if applicable). The **Status** column indicates the current status or stage for the Declaration.

- Click the **Primary PIN** hyperlink to view or progress the stage of a submitted Declaration.

### **INCOMPLETE SUB-TAB**

This tab displays Declarations that have been started but not submitted. The Incomplete sub-tab displays all incomplete Declarations initiated by the customer's users

### **HISTORY SUB-TAB**

This tab displays a list of all Declarations your user account has submitted regardless of the status.

### **SEARCH SUB-TAB**

This tab allows users to search for specific Declarations using the Declaration ID or Primary PIN and the current status of the Declaration. For a Declaration to be displayed, the correct current status of the Declaration must be selected. **Note:** Use the **Search** sub-tab to locate and accept a Declaration initiated by another user. This will move the Declaration to your **Attention Needed** inventory for further action.

### **ACCOUNTING TAB**

This tab is only present for select user access types of authorized settlement agencies, and government agencies.

### **SUMMARY SUB-TAB**

This sub-tab displays Stamp Accounting Reports for the Current Cycle (most recent report generated) and Stamp Account Reports in Arrears and Credit Balances (any reports from prior dates with a non-zero balance).

### **HISTORY SUB-TAB**

This sub-tab displays all Stamp Accounting Reports that have been generated by the system.

### **MESSAGES TAB**

This tab displays notices regarding Declarations that need review.

The **Inbox** tab displays notices posted to your account. To view the details of a notice, click the subject hyperlink. A check mark in the **Read** column indicates that you have viewed the details of the notice.

## REQUESTS TAB

Use the sub-tabs in this tab to view requests waiting to be processed and to search for requests by various criteria. You can use the header hyperlinks in the title bar to specify a date or confirmation number to search by. Click the **Defaults** hyperlink to re-display the default information for the tab.

Click the hyperlink for a request to view its details.

*Related items:* [File a Declaration?](#) [View the status of a Declaration?](#) [View the details of a submitted Declaration?](#) [Change a submitted Declaration?](#)

## Access and logon information

### Sign up for a MyDec Account

#### WHAT DO I DO?

1. Click **Sign me up!**
2. Select the appropriate type of registration.
  - a. Select **Account Administrator** if you are an **Individual** or are submitting the first MyDec login request for your organization.
  - b. Select **I have an Invite Code** if you received an email inviting you to access a MyDec account.
3. Complete the appropriate fields.
4. Click **Submit**.
5. Review the **Activation Summary**. Click **OK** to confirm that you would like to submit the request.

**Note:** If you are not sure or need to go back and make changes to the Activation information, click **Cancel**.
6. Once confirmed, the activation is saved and an information window opens displaying your confirmation number. An authorization code will be sent to your email address. Click **OK** to continue.

*Related items:* [Log on?](#) [Log off?](#) [Reset my password?](#)

## Password Rules

Passwords must follow these rules:

- Minimum 8 characters, no more than 30
- Passwords must contain both letters and numbers
- Passwords must be mixed case

*Related items:* [Change my password?](#) [Reset a forgotten password?](#) [Change my security question?](#) [Change the answer to my security question?](#)

## Understanding Account Types and Logons

### ACCOUNT TYPES

There are four account types available in MyDec.

- **Individual**
- **Law Firm**
- **Settlement Agency**
- **Government Agency**

Each account type has certain access types that can be set for each logon.

An **Individual** account may only have one logon. This logon will be granted **Individual** access rights.

A **Law Firm**, **Settlement Agency**, or **Government Agency** may have multiple logons. For example, if several employees of an organization need to access a company's MyDec account, each employee will have his or her own unique logon.

When you first register, your logon is created. The first user for a company or organization that registers is given **Account Administrator** access. The logon designated as Account Administrator can invite a new user and control access for all other logons created for the account.

**Note:** Only **Settlement Agency** accounts may apply to become stamp authorized.

*Related items:* [Invite a new user?](#) [Change the access type or active status of a logon?](#) [Default access type for invited user logons?](#)

## Log On

### WHAT DO I DO?

1. In the Login section, enter your username and password into the appropriate fields.  
**Note:** If this is your first time logging in, enter the authorization code in the **Authorization Code** field. You should have received your code by email.
2. Click the **Login** button.

*Related items:* [Reset my password?](#) [Sign up for a MyDec account?](#) [Log off?](#)

## Request to Access Converted EZ Dec Declarations

Individuals and the Account Administrator for Law Firms and Settlement Agencies can request to access their account's Declarations converted from EZ Dec. **Note:** Only fully submitted EZ Dec Declarations will be converted.

*Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:*

- **Home**

### WHAT DO I DO?

1. In the **I want to...** section, click the **Restore data from EZ Dec** hyperlink.
2. Enter your EZ Dec Account ID and Administrator's email.
3. Click **Submit**.
4. Review your entries for accuracy. You will be required to re-enter your password to authorize your request. A Confirmation message is displayed.
5. Once the Department processes your request, your converted EZ Dec Declarations will be available.

**Note:** Companies with multiple EZ Dec Account IDs must submit a separate request for each EZ Dec Account ID in order to regain access to all EZ Dec data. Only submit one request for each EZ Dec Account ID.

*Related items:* [Sign up for a MyDec account?](#)

## Reset a Forgotten Password

If you forget your password, you can reset your password yourself.

However, it is important that the password reset process be completed in one sitting. If, for some reason, your session times out while resetting your password, you will be unable to logon. You will need to call the Department and request to have your account unlocked.

### WHAT DO I DO?

1. On the **Logon** window, click **Forgot?**
2. Enter your username in the **Username** field.
3. Click the **Next** button.
4. Enter the answer to your secret question.
5. Click **Submit**. A link to reset your password will be sent to the email address associated with your account.

**Note:** For your protection, the link is valid for **only 30 minutes** and can **only be used once**.

6. The link sent to your email will take you to the **Reset Password** window.
7. Enter your new password in the **New Password** field.
8. Enter your new password again in the **Confirm Password** field.
9. Click **Reset**. Use your new password when you login to your MyDec account.

*Related items:* [Change my password?](#) [View password rules?](#) [Change my security question?](#) [Change the answer to my security question?](#)

## Change My Password

### WHERE DO I START?

*Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:*

- **Home**

### WHAT DO I DO?

1. In the **I want to...** section, click the **Profile** header hyperlink.
2. In the **I want to** section, click **Change Password**.
3. In the **Current Password** field, type your current password.
4. Type your new password in the **New Password** field.
5. Type your new password again in the **Confirm Password** field.
6. Click the **Reset** button.

**Note:** Your new password is active immediately. The next time you are requested to enter your password to perform an action you will need to use your new password.

*Related items:* [Reset a forgotten password?](#) [View password rules?](#) [Change my security question?](#) [Change the answer to my security question?](#)

## Log Off

Logging off takes you back to the home screen where you can login again, if necessary, or perform other tasks.

### WHAT DO I DO?

You can log off by clicking the **Log Off** hyperlink in the menu bar on the left side of the window.

*Related items:* [Log on?](#)

## Cancel My Online Access

### WHERE DO I START?

*Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:*

- **Home**

### WHAT DO I DO?

1. In the **I want to...** section, click the **Profile** header hyperlink.
2. In the **I want to** section, click **Cancel My Online Access**.
3. Enter your password into the **Password** field to confirm that you wish to cancel your online access.
4. Click **OK**.

**Note:** By cancelling your online access, you will no longer be able to access your MyDec account.

*Related items:* [Log off?](#)

## Reactivate Online Access

You cannot reactivate a logon name that has been cancelled. However, you can create a new logon name and password to access your MyDec account.

*Related items:* [Sign up for a MyDec account?](#)

## Additional user information

### Invite a New User

The **Account Administrator** has the ability to invite a new user. **Note:** Only MyDec accounts registered as a Law Firm, Settlement Agency, or Government Agency are allowed more than one logon user.

#### WHERE DO I START?

*Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:*

- **Home**

#### WHAT DO I DO?

1. Under the **I want to** heading, click the **Invite a new user** hyperlink.
2. Complete the appropriate fields in the window.
3. Click **Submit**. You will be asked to re-enter your password to authorize your request. A confirmation message is displayed.
4. An invite code will be sent for the user via email.
5. The invited user will use the invite code when submitting a new login request.

*Related items:* [Understand logons?](#) [Change the access type or active status of a logon?](#) [Default access type for invited user logons?](#)

### Default Access Type for Invited User Logons

The default access type for invited user logons is **Standard User**. The access type is set when the user submits a new login request using the Invite Code included in the email sent to them inviting them to access your MyDec account.

**Note:** The access type for a specific logon can be changed at any time by the Account Administrator.

*Related items:* [Understand logons?](#) [Invite a new user?](#) [Change the access type or active status of a logon?](#)

### Manage Logons

Use this window under the **Profile** header hyperlink to view or manage the logons for the MyDec account.

## LOGONS TAB

This tab lists the current web logons for the MyDec account. Click the web logon name hyperlink to edit the details for the web logon.

*Related items:* [Invite a new user?](#) [Change the access type or active status of a logon?](#)  
[Default access type for invited user logons?](#)

## Access Type Detail

Use this window to edit the access types for a web logon.

## LOGON DETAILS

**Web Logon:** This field displays the web logon for which you are editing details.

**Web Name:** This field displays the taxpayer name.

**Access Type:** This field displays the access type for this logon.

**Status:** This field displays the active status for this logon.

## WHAT TYPES OF ACCESS CAN LOGONS HAVE?

The Account Administrator has complete control over the type of access each logon has in MyDec. Each MyDec account type has certain access types that can be set for each logon. The access types that can be granted for each account type are listed below.

### Individual

- Individual – Allowed to add, view, print, accept, and close on Declarations they have submitted.

### Law Firm

- Standard User – Allowed to add, view, print, accept, and close on Declarations created or accepted by this customer's users. Can search for and Accept Declarations that have been submitted by an individual or another customer.
- Account Administrator – Allowed to invite and deactivate users, edit user access types, and all functions of Standard User.

### Settlement Agency

- Standard User – Allowed to add, view, print, accept, and close on Declarations created or accepted by this customer's users. Can search for and Accept Declarations that have been submitted by an individual or another customer.

- Stamp Purchaser – **Authorized Settlement Agency only** – Allowed to authorize, purchase, void, and print Real Estate Transfer Tax Stamps, and all functions of Standard User.
- Accountant – **Authorized Settlement Agency only** – Allowed to access accounting screens and all functions of Standard User.
- Account Administrator – Allowed to invite and deactivate users, edit user access types, and all functions of other access types, when applicable.

*Related items:* [Change the access type or active status of a logon?](#) [Default access type for invited user logons?](#) [Understand logons?](#) [Invite a new user?](#)

## Change the Access Type or Active Status of a Logon

### WHERE DO I START?

*Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:*

- **Home**

### WHAT DO I DO?

1. In the **I want to...** section, click the **Profile** header hyperlink.
2. View the **Manage Logons** tab.
3. Click the hyperlink in the **Status** column for the logon whose access type you want to change. An **Edit Access Type** window is displayed.
  - a. To change the access type, click the blue drop-down arrow in the **Access Type** field. Select the new access type:
    - i. Standard User – Allows the logon to add, view, print, accept, and close on Declarations created or accepted by this customer's users. A logon with this access type can search for and Accept Declarations that have been submitted by an individual or another customer.
    - ii. Stamp Purchaser – **Authorized Settlement Agency only** – Allows the logon to authorize, purchase, void, and print Real Estate Transfer Tax Stamps, and all functions of Standard User.
    - iii. Accountant – **Authorized Settlement Agency only** – Allows the logon to access accounting screens and all functions of Standard User.
    - iv. Account Administrator – Allows the logon to invite and deactivate users, edit user access types, and all functions of other access types, when applicable.

- b. To set a logon as inactive, click in the **Active** check box to remove the check mark.
  - c. To activate a logon, click in the **Active** check box to add a check mark.
4. Click **Save**.

*Related items:* [Understand logons?](#) [Invite a new user?](#) [Default access type for invited user logons?](#)

## **Security information**

### **Change My Security Question**

#### **WHERE DO I START?**

*Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:*

- **Home**

#### **WHAT DO I DO?**

1. In the **I want to...** section, click the **Profile** header hyperlink.
2. In the **I want to** section, click **Update Profile**.
3. Click the drop-down arrow in the **New Question** field and select your new security question from the drop-down menu.
4. Type a new answer in the **Answer** field. (Note that the answer is not case-sensitive.)
5. Confirm the answer by typing it again in the **Confirm** field.
6. Click **Save**.
7. An authorization window opens requiring you to authorize the change. Enter your password in the **Password** field, then click **Yes**.

*Related items:* [Change my password?](#) [Reset a forgotten password?](#) [View password rules?](#) [Change the answer to my security question?](#) [Change my web name?](#) [Change my email address?](#) [Change my telephone number?](#)

### **Change the Answer to My Security Question**

#### **WHERE DO I START?**

*Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:*

- **Home**

## WHAT DO I DO?

1. In the **I want to...** section, click the **Profile** header hyperlink.
2. In the **I want to** section, click **Update Profile**.
3. Type a new answer in the **Answer** field. (Note that the answer is not case-sensitive.)
4. Confirm the answer by typing it again in the **Confirm** field.
5. Click **Save**.
6. An authorization window opens requiring you to authorize the change. Enter your password in the **Password** field, then click **Yes**.

*Related items:* [Change my password?](#) [Reset a forgotten password?](#) [View password rules?](#) [Change my security question?](#) [Change my web name?](#) [Change my email address?](#) [Change my telephone number?](#)

## Contact information

### Change My Telephone Number(s)

#### WHERE DO I START?

*Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:*

- **Home**

#### WHAT DO I DO?

1. In the **I want to...** section, click the **Profile** header hyperlink.
2. In the **I want to** section, click the **Update Profile** hyperlink.
3. Type your new number(s) in the **Phone 1** or **Phone 2** field.
4. Click **Confirm**.
5. An authorization window opens requiring you to authorize the change. Enter your password in the **Password** field, then click **Yes**.

*Related items:* [Change my web name?](#) [Change my email address?](#) [Change my security question?](#) [Change the answer to my security question?](#) [Change my password?](#)

### Change My Email Address

#### WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

#### **WHAT DO I DO?**

1. In the **I want to...** section, click the **Profile** header hyperlink.
2. In the **I want to** section, click the **Update Profile** hyperlink.
3. In the **Email** field, type your new email address.
4. Click **Confirm**.
5. An authorization window opens requiring you to authorize the change. Enter your password in the **Password** field, then click **Yes**.

*Related items:* [Change my web name?](#) [Change my telephone number?](#) [Change my security question?](#) [Change the answer to my security question?](#) [Change my password?](#)

## **Change My Web Name**

#### **WHERE DO I START?**

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

#### **WHAT DO I DO?**

1. In the **I want to...** section, click the **Profile** header hyperlink.
2. In the **I want to** section, click the **Update Profile** hyperlink.
3. In the **Web Name** field, type your new web name.
4. Click **Confirm**.
5. An authorization window opens requiring you to authorize the change. Enter your password in the **Password** field, then click **Yes**.

*Related items:* [Change my email address?](#) [Change my telephone number?](#) [Change my security question?](#) [Change the answer to my security question?](#) [Change my password?](#)

## **Profile**

You can use this window to view your MyDec profile information.

Use the hyperlinks in the **I want to...** panel in the upper right corner of the window to edit your web profile information.

## PROFILE

This panel shows your web name, phone number(s), email address, and secret question.

- To edit the information in this panel, click the **Update Profile** hyperlink in the **I want to...** panel.

## MANAGE LOGONS TAB

This tab lists all existing logons for your MyDec account. The access type and active status is also displayed for each logon. **Note:** Only Account Administrators can manage the logons for an organization's MyDec account.

*Related items:* [Change my web name?](#) [Change my phone number?](#) [Change my email address?](#) [Change my security question?](#) [Change the answer to my security question?](#) [Cancel my online access?](#) [Change my password?](#)

## Communication from the Department

### Emails from the Department

You will receive emails from the Department for initial MyDec registration, MyDec account logon purposes (reset password, if you have been invited to access a company's MyDec account), or to alert you that a Declaration has been returned to you for correction.

### View Messages

#### WHERE DO I START?

*Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:*

- **Home**

#### WHAT DO I DO?

1. Click the **Messages** tab.
2. You can view messages sent to you:
  - a. To view a list of messages regarding Declarations, view the **Inbox** or **Unread** sub-tab.

- b. To view the details of a message, click the hyperlink in the **Subject** column.

*Related items:* [Delete a message?](#)

## Delete a Message

### WHERE DO I START?

*Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:*

- **Home**

### WHAT DO I DO?

1. Click the **Messages** tab.
2. Click the **Inbox** or **Unread** sub-tab.
3. In the far right column, click the **Delete** hyperlink for the notice you wish to delete.

*Related items:* [View messages?](#)

## Information about web requests

### Understanding Requests

Anytime you make a change or perform an action on your account, it is recorded as a *request*. This request will be processed by the system as an immediate request. Filing a Declaration, inviting a new user, and updating your profile are all examples of requests.

*Related items:* [Search for a request?](#) [View the details of a request?](#) [Withdraw a saved Declaration?](#)

### Request Tab

This tab shows you a list of the requests made for the MyDec account. Requests may be in one of three sub-tabs.

#### **STARTED BUT NOT FILED sub-tab**

This sub-tab shows all of a company's Declaration requests that have been started but not been submitted. (Note that if there are no Declaration requests that have been saved to finish later, this sub-tab is not displayed.)

- To view further details or take action on a request, click the request hyperlink in the **Confirmation #** column.

### **WAITING TO BE PROCESSED sub-tab**

This sub-tab shows you a list of requests that are still pending processing. (Note that if there are no requests that are waiting to be processed, this sub-tab is not displayed.)

- To view further details of a request, click the request hyperlink in the **Confirmation #** column.

### **ALL REQUESTS sub-tab**

This sub-tab shows you requests that have been processed recently.

- Click the **Change Date** header hyperlink in the far right of the panel title bar to change the number of days for which you are viewing requests.
- Click the **Confirmation Number** header hyperlink to search for a particular request by entering the confirmation number and clicking the **Search** button.

*Related items:* [View the status of a Declaration?](#) [View the details of a request?](#) [Search for a request?](#)

## **Search for a Request**

### **WHERE DO I START?**

*Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:*

- **Home**

### **WHAT DO I DO?**

1. Click the **Requests** tab.
2. If it is not already selected, click the **All Requests** sub-tab.
3. Depending on how you want to search for the request, you can:
  - a. Click the **Change Date** hyperlink in the tab title bar. Enter the earliest date from which you wish to search, then click the **OK** button. Click the title hyperlink for the request you wish to view. Or
  - b. Click the **Confirmation Number** hyperlink in the tab title bar. Enter the exact confirmation number of the request you wish to view, then click **OK**. The request is displayed.

*Related items:* [View the details of a request?](#) [Withdraw a saved request?](#) [Withdraw a saved Declaration?](#)

## View the Details of a Request

### WHERE DO I START?

*Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:*

- **Home**

### WHAT DO I DO?

1. Click the **Requests** tab.
2. Depending on whether you wish to view an incomplete request, a pending request, or a processed request, you can:
  - a. Click the **Started but not filed** or **Waiting to be Processed** sub-tab. In the **Confirmation #** column, click the hyperlink for the request to view more details.
  - b. Click the **All Requests** sub-tab to search for the request. On the **All Requests** sub-tab select the hyperlink in the tab title bar that best describes the type of search you want to conduct.

*Related items:* [Withdraw a saved request?](#) [Search for a request?](#) [Withdraw a saved Declaration?](#)

## MyDec Declaration process

### Understanding the steps to complete a Declaration

Be sure that the steps below are followed when completing Declarations within MyDec. All steps **MUST** be completed before the deed and Declaration can be recorded.

1. Click the **Add a new Declaration** hyperlink in the **I want to...** panel in the upper right corner of the window.
2. Once you have entered all Declaration information, click **Submit**. The Declaration will be assigned a Declaration ID and the status is **Declaration Submitted**.
3. The Declaration must be accepted in order to close.
  - a. You may pass the Declaration to a Law Firm or Settlement Agency that will conduct the actual closing.

- b. Attorneys and Individuals performing their own closings will Accept **and** Close the Declaration.
4. Click the **Accept Declaration** hyperlink in the **Actions** menu in the left navigation column when viewing the Declaration.
5. Click the **Complete Closing** hyperlink in the **Actions** menu in the left navigation column when viewing the Declaration.
6. Once the Declaration is closed, it needs to be review by the appropriate government agency(ies) and stamps must be purchased.
  - a. **Authorized Settlement Agencies (who performed closing) only** – Click the **Authorize Stamp** hyperlink(s) in the **Actions** menu in the left navigation column when viewing the Declaration.
    - i. Click the **Print Stamp** hyperlink(s) in the **Actions** menu.
    - ii. If the Declaration is later rejected due to incorrect tax amounts, you may need to void the original stamps. Click the **Void Stamp** hyperlink(s) in the **Actions** menu.
  - b. Individuals, Law Firms, and Settlement Agencies not authorized to print stamps must purchase stamps from the appropriate government agency(ies).
7. Present the Declaration and any required documents with the deed or trust document to the appropriate government agency(ies).

*Related items:* [File a Declaration?](#) [Print the details of a submitted Declaration?](#) [Other documents needed in the MyDec filing process?](#)

## Other documents needed in the MyDec filing process

The MyDec system requires you to provide information from several documents, including

- deed or trust document;
- Water Certificate and Certificate of Zoning Compliance, if applicable, for Chicago transactions; and
- any documentation needed for unique transactions (ex: PTAX-203-NR).

Providing this information on MyDec will allow you to monitor the progress of your Declaration, and if you are an authorized Settlement Agency, print transfer tax stamps. This does not change your obligation to provide all required documentation to your municipality and county.

*Related items:* [Understanding the steps to complete a Declaration?](#) [File a Declaration?](#) [View the details of a submitted Declaration?](#) [View the status of a Declaration?](#) [Change a](#)

[submitted Declaration?](#) [Print the details of a submitted Declaration?](#) [Understanding the status of a Declaration?](#) [MyDec Declaration Stages?](#)

## **Information about adding a new Declaration**

### **File a Declaration**

#### **WHERE DO I START?**

*Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:*

- **Home**

#### **WHAT DO I DO?**

1. Click the **Add a new Declaration** hyperlink in the **I want to...** panel in the upper right corner of the window.
2. Complete the appropriate fields as necessary.
  - a. Field colors help you determine information about the field:
    - i. Yellow fields are required
    - ii. Green fields are editable
    - iii. Red fields are in error; you must correct the value before you can submit the Declaration
  - b. You will also see a list of forms across the top of the Declaration. Click the form name tab to complete the information for that form. When selected, each form tab will display a list of sub-tabs directly underneath.
  - c. If any form sub-tab contains a field in error (or requires a value), a red stop sign will appear next to the name of the form and applicable sub-tab that is in error. You cannot submit your Declaration if there are any form sub-tabs in error. Click the form name and sub-tab to correct the error or complete the required value.
3. When you are satisfied with the Declaration, you can proceed by performing any of the following:
  - a. Click **Submit** to file the Declaration. You will be required to re-enter your password and click **OK** to confirm your submission. An information window will tell you that your Declaration has been submitted and the Declaration will display in your **Attention Needed** sub-tab after your request is processed. Buttons are available on this window to allow you to take further action or close the window.

- b. Click **Save and Finish Later** to save the changes you made, but not submit the Declaration request. (This requires you to finish your changes at a later time and submit the changes in order for the Declaration to be filed.) You will be required to re-enter your password to confirm your action. A message is displayed confirming that your Declaration has been saved. Click **OK**. To retrieve your Declaration, click the **Declarations** tab and then the **Incomplete** sub-tab. The saved Declaration will have a status of **Open**.
- c. Click **Cancel** to close this window without saving any of your changes.

*Related items:* [View the details of a submitted Declaration?](#) [View the status of a Declaration?](#) [Work with incomplete Declarations?](#) [Change a submitted Declaration?](#) [Print the details of a submitted Declaration?](#) [Troubleshoot printing a Declaration?](#) [Withdraw a saved Declaration?](#)

## Incomplete Declarations

You may begin to complete a Declaration and discover that you have to stop and finish later.

### WHAT DO I DO?

To save a Declaration to finish later

1. To save a Declaration to finish later, just begin completing the Declaration as usual. ([Click here](#) to view the standard instructions for filing a Declaration.)
2. Once you have reached your stopping point, click **Save and Finish Later**.
3. You will be asked to re-enter your password click **OK** to confirm that you wish to save and finish later. The Declaration will be saved with a status of **Open**.

**Note:** At this point the Declaration is not filed. You will need to revisit the Declaration to complete and submit it.

To retrieve an incomplete Declaration

1. To retrieve the incomplete Declaration, click the **Declarations** tab.
2. Click the **Incomplete** sub-tab. The saved Declaration will have a status of **Open**.
3. Click the hyperlink in the **View** column for the Declaration you want to finish.
4. Click **Change/Submit** to change the Declaration details.
5. The fields in the window become editable. Make changes to the Declaration, as necessary.
6. When you have completed the fields on the Declaration and are ready to file, click **Submit** to file the Declaration.

7. Click **OK** to confirm your submission.
8. An information window will tell you that your Declaration has been submitted and the Declaration will now be able to be accepted by the initiating user or passed to an attorney or settlement agency for acceptance, if applicable. You can use the buttons in the upper right corner of this window to take further action or close the window.

*Related items:* [File a Declaration?](#) [View the details of a submitted Declaration?](#) [View the status of a Declaration?](#) [Change a submitted Declaration?](#) [Print the details of a submitted Declaration?](#) [Troubleshoot printing a Declaration?](#) [Withdraw a saved Declaration?](#)

## View the Status of a Declaration

### WHERE DO I START?

*Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:*

- **Home**

### WHAT DO I DO?

1. Click the **Declarations** tab.
2. Depending on the Declaration's stage in the approval process, you can:
  - a. Click the **Attention Needed** sub-tab and look in the **Status** column;
  - b. Click the **History** sub-tab and search for the Declaration whose status you wish to view. Then look in the **Status** column.

*Related items:* [File a Declaration?](#) [View the details of a submitted Declaration?](#) [Work with incomplete Declarations?](#) [Change a submitted Declaration?](#) [Print the details of a submitted Declaration?](#) [Troubleshoot printing a Declaration?](#) [Withdraw a saved Declaration?](#)

## Change a Submitted Declaration

Depending on the status and ownership of the Declaration, you may be able to change a Declaration after it is submitted.

### WHERE DO I START?

*Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:*

- **Home**

## WHAT DO I DO?

1. On the **Declarations** tab, view the **Attention Needed** or **History** sub-tab.
2. Click the **Primary PIN** hyperlink for the Declaration you wish to change. The Declaration details are displayed.
3. Click **Change Declaration** to change the Declaration details. **Note:** If the Declaration cannot be changed, **Change Declaration** is not displayed.
4. The fields in the window become editable. Make changes to the Declaration as necessary.
  - a. Field colors help you determine information about the field:
    - i. Yellow fields are required
    - ii. Green fields are editable
    - iii. Red fields are in error; you must correct the value before you can submit the Declaration
  - b. You will also see a list of forms across the top of the Declaration. Click the form name tab to complete the information for that form. When selected, each form tab will display a list of sub-tabs directly underneath.
  - c. If any form sub-tab contains a field in error (or requires a value), a red stop sign will appear next to the name of the form and applicable sub-tab that is in error. You cannot submit your Declaration if there are any form sub-tabs in error. Click the form name and sub-tab to correct the error or complete the required value.
5. After you have made your changes:
  - a. Click **Submit** to change your Declaration. Click **OK** to confirm your submission. An information window will tell you that your request has been submitted. Buttons are available on this window to allow you to take further action or close the window.
  - b. Click **Cancel** to close this window without saving any of your changes.

*Related items:* [File a Declaration?](#) [View the details of a submitted Declaration?](#) [View the status of a Declaration?](#) [Work with incomplete Declarations?](#) [Print the details of a submitted Declaration?](#) [Troubleshoot printing a Declaration?](#) [Withdraw a saved Declaration?](#)

## Withdraw a Saved Declaration

If a Declaration request has not yet been submitted, you can withdraw the saved request.

## WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

## WHAT DO I DO?

1. On the **Declarations** tab, view the **Incomplete** sub-tab.
2. Click the **View Request** hyperlink for the Declaration you want to withdraw.
3. Click **Withdraw**.
4. Click **Confirm** to confirm that you do want to withdraw the Declaration.

*Related items:* [File a Declaration?](#) [View the details of a submitted Declaration?](#) [View the status of a Declaration?](#) [Work with incomplete Declarations?](#) [Change a submitted Declaration?](#) [Print the details of a submitted Declaration?](#) [Troubleshoot printing a Declaration?](#)

## View the Details of a Submitted Declaration

### WHERE DO I START?

Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:

- **Home**

## WHAT DO I DO?

1. Click the **Declarations** tab.
2. Depending on the Declaration's stage in the approval process, you can:
  - a. Click the **Attention Needed** sub-tab. Then click the **Primary PIN** hyperlink for the Declaration you wish to view;
  - b. Click the **History** sub-tab and search for the Declaration whose details you wish to view. Then click the **Primary PIN** hyperlink for the appropriate Declaration; or
  - c. Click the **Search** sub-tab. Enter the Declaration ID or Primary PIN and the Declaration's current status then click **Search**. Click the **Primary PIN** hyperlink to view the Declaration.
3. The Declaration details are displayed.

*Related items:* [File a Declaration?](#) [View the status of a Declaration?](#) [Work with incomplete Declarations?](#) [Change a submitted Declaration?](#) [Print the details of a submitted Declaration?](#) [Troubleshoot printing a Declaration?](#) [Withdraw a saved Declaration request?](#)

## Print the Details of a Submitted Declaration

**IMPORTANT:** You must present a printed copy of your MyDec Declaration and any required documents with the deed or trust document to the County Recorder's Office within the county where the property is located.

If your municipality is a participant of MyDec, there is no need to bring a printed copy of your MyDec Declaration for municipality review. Provide the reviewer with the Declaration ID assigned by MyDec. **Note:** If your municipality requires a copy of the Declaration, you can print MyDec Declarations after they have been submitted.

### WHERE DO I START?

*Depending on which window you are already on, you may need to click the following hyperlink in the menu bar on the left side of the window:*

- **Home**

### WHAT DO I DO?

1. Click the **Declarations** tab.
2. Depending on the Declaration's stage in the approval process, you can:
  - a. Click the **Attention Needed** sub-tab and locate the Declaration you want to print;
  - b. Click the **History** sub-tab and locate the Declaration you want to print; or
  - c. Click the **Search** sub-tab. Enter the Declaration ID or Primary PIN and the Declaration's current status. Then click **Search** and locate the Declaration you want to print.
3. Click the **Primary PIN** hyperlink for the appropriate Declaration.
4. Click the **Printable Copy of Declaration** hyperlink in the **Actions** menu to print the details of the Declaration.

*Related items:* [File a Declaration?](#) [View the details of a submitted Declaration?](#) [View the status of a Declaration?](#) [Work with incomplete Declarations?](#) [Change a submitted Declaration?](#) [Troubleshoot printing a Declaration?](#) [Withdraw a saved Declaration request?](#)

## Troubleshoot Printing a Declaration

**IMPORTANT:** You must present a printed copy of your MyDec Declaration and any required documents with the deed or trust document to the County Recorder's Office within the county where the property is located.

If you are able to click **Printable Copy of Declaration**, but are still unable to print Declarations, please check the following:

- Adobe Reader is installed on your computer. [Click here to download the latest version of Adobe Reader.](#)
- Pop-ups are enabled in your browser. [Click here to learn more about enabling pop-ups.](#)

*Related items:* [File a Declaration?](#) [View the details of a submitted Declaration?](#) [View the status of a Declaration?](#) [Work with incomplete Declarations?](#) [Change a submitted Declaration?](#) [Print the details of a submitted Declaration?](#) [Withdraw a saved Declaration request?](#)

## **Declaration Stage and Status Information**

### **MyDec Declaration Stages**

MyDec Declarations advance through the following stages in the recording process

- Submit a Declaration
- Accept a Declaration
- Complete Closing
- Review, Stamp Purchase, and Recording

*Related items:* [Understanding the status of a Declaration?](#) [Understanding the steps to complete a Declaration?](#) [Other documents needed in the MyDec filing process?](#)

### **Understanding the Status of a Declaration**

The status of a Declaration changes as it advances through the approval stages of the recording process.

- **Open** – saved but not submitted
- **Declaration Submitted**
- **Declaration Accepted** – by user or company that will close the transaction
- **Closing Completed** – no longer editable, Real Property Transfer Taxes are immediately due, authorized Settlement Agencies may authorize and print transfer tax stamps
- **Municipality Verified** (if applicable)
- **County Verified**
- **Rejected**
- **Deed Recorded**

*Related items:* [MyDec Declaration Stages? Understanding the steps to complete a Declaration?](#) [Other documents needed in the MyDec filing process?](#)

## **Glossary**

### **Action bar**

The action bar is displayed on the top of many windows. It contains the back and forward buttons, action buttons, and the breadcrumb trail.

### **Action button**

An action button performs a specific action when selected. You click an action button to perform an action or open a new window where you can complete the action. Some common action buttons include Submit, Save and Continue, Save and Finish Later, and OK.

### **Breadcrumb trail**

The breadcrumb trail shows you the full context of the window that you are currently viewing. The hyperlinks in the trail can be used to navigate to other windows.

### **Drop-down menu**

A drop-down menu contains a list of preset items. To select an item in the list, click the down arrow at the right of the field, scroll down to the item you want, and click on it.

### **Hyperlink**

A hyperlink is generally represented by blue text in a window or panel. Hyperlinks can also be found in the title bars of various panels. In these cases, the text is usually white. When you hover your mouse over any hyperlink text, it becomes underlined, further indicating that the text is a hyperlink. Clicking a hyperlink opens another window or allows you to perform some action.

## **Government Agency Links**

### **State of Illinois**

[State of Illinois Real Estate Transfer Tax Regulations \(Title 86 Part 120\)](#)

[Illinois Real Estate Transfer Tax – Statutory Reference](#)

[Illinois Real Estate Transfer Tax Law](#)

[Illinois Form PTAX-203-NR \(for deedless transactions\)](#)

## **Cook County**

[Cook County Real Estate Transfer Tax Ordinance \(Section 74 Article III\)](#)

[Cook County Recorder's Office](#)

[Cook County Assessor's Office](#)

## **City of Chicago**

[City of Chicago Real Property Transfer Ordinances \(Section 3-33\)](#)

[CTA Real Property Transfer Tax Refund Form \(for senior citizens 65 years of age or older\)](#)

[Chicago Department of Finance – Water Billing and Customer Service](#)

[City of Chicago Department of Buildings](#)

[City of Chicago Zoning Ordinance Administration](#)

[City of Chicago Department of Finance \(Real Property Transfer Tax Rulings\)](#)

## **Information for Settlement Agencies wishing to become authorized to purchase and print MyDec Stamps**

[Application, Contract, and Instructions for Purchasing and Printing MyDec Stamps](#)