*i*nformational

Bulletin

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This bulletin is written to inform you of recent changes; it does not replace statutes, rules and regulations, or court decisions.

For information or forms
Visit our web site at:
tax.illinois.gov

Call us at:
**1 800 732-8866 or
217 782-3336**

Call our TDD
(telecommunications device
for the deaf) at:
1 800 544-5304

New Online Account Management System Available

To all tax professionals and taxpayers registered for Illinois sales, use, and other related taxes

MyTax Illinois

TAKE CONTROL OF YOUR TAXES

Look for this logo!

On September 24, 2012, **MyTax Illinois**, an online account management program for taxpayers, will become available. MyTax Illinois provides a centralized location on the Illinois Department of Revenue (IDOR) website for taxpayers to register a new business, file returns, make payments, and manage their tax accounts. With MyTax Illinois, more sales, use, and other related tax returns can now be filed electronically including the ART-1, CMFT-1, PST-1, ST-1, ST-4, ST-8, ST-14, ST-44, and ST-556. Other new functions include the ability for ST-1 filers to file electronically with special attachments and credits such as Schedule ST-2-DP and ST-2-TS, and PST-2 reporting. For MyTax Illinois information and special filing and payment requirements for IFTA, see Informational Bulletin FY 2013-03 at **tax.illinois.gov**.

What taxes will be included in MyTax Illinois?

All tax types listed below will eventually be part of MyTax Illinois. Full implementation will take place in three phases, with a tentative completion date of June 2013.

Phase 1 – September 2012
- New business registration for all tax types administered by IDOR
- Sales, use, and other related tax return filing, payment, and account management (includes taxpayers who file Forms ART-1, CMFT-1, PST-1, ST-1, ST-4, ST-8, ST-14, ST-44, and ST-556)
- International Fuel Tax Agreement (IFTA) registration, filing, payment, and account management

Phase 2 – March 2013
- Excise tax return filing, payment, and account management

Phase 3 – June 2013

- Withholding income tax return filing, payment, and account management
- Business income tax return filing, payment, and account management
- Individual income tax account management

Other than the addition of new taxes in each phase, should I expect any other changes to MyTax Illinois?

Yes. With MyTax Illinois, IDOR wants to put more control of tax accounts into your hands by adding more functionality as we continue to build the system. Look for information on **tax.illinois.gov** and on the home screen for MyTax Illinois.

What will I be able to do using MyTax Illinois?

With the first phase of MyTax Illinois, you will be able to

- register a new business,
- file and view original and amended returns,
- schedule, adjust, and make payments online,
- view correspondence received from IDOR, and
- view account information.

Each of these functions will be available to you from one centralized location, and all in one session, for all return types in Phase 1.

How do I access MyTax Illinois?

To set up your MyTax Illinois access, you must complete specific information about you and your company. First, go to **tax.illinois.gov** and click on the MyTax Illinois logo. Follow the instructions to advance to the MyTax Illinois home screen. From there, you will click on the "Sign up now!" button, complete all required fields on the "Activation Summary" page, and then click "submit".

After IDOR verifies your submitted information— usually within a minute or two—we will send a message to the email address you provided giving you the authorization code needed for your initial login. Then, go back to the MyTax Illinois home screen (through **tax.illinois.gov** or use the link within the email) and enter your username and password, along with the authorization code. **Note:** The authorization code is only required for your first login.

As more taxes are added to MyTax Illinois, no additional action will be necessary if you have already activated your account for sales, use, and other related taxes. MyTax Illinois will automatically provide account information for the additional taxes when you logon.

If you have trouble activating your MyTax Illinois account, call us at **217 785-3707**.

Will I have a separate MyTax Illinois account for each type of return I file?

No. Activation is based on your Social Security number (SSN) if you are a sole proprietor or your Federal Employer Identification Number (FEIN) for all other businesses. This means that your company can only have **one** MyTax Illinois account per FEIN or SSN.

Your company will be required to designate a "Primary User" to set up your MyTax Illinois account who will then grant others access.

How do I grant others access to my MyTax Illinois account?

The primary user has two methods for granting others access to your company's MyTax Illinois account. The first method is to create a secondary user ID, which enables another person to access your account without requiring them to set up their own primary account. The secondary user will have a unique user ID and password for your account. The primary user can set up multiple secondary users as needed.

The second method the primary user can use is to grant third-party access to your company's MyTax Illinois account. This is typically used for a tax preparer. The third-party user must have their own MyTax Illinois account in order to access your account, and they are required to enter shared secret information to verify that they should have access to your account. If the third party is not registered for one of the taxes currently available in MyTax Illinois, they will not be able to create their own MyTax Illinois account or have access to yours through the third-party method. Any third-party you wish to grant access to who does not have their own MyTax Illinois account can still be granted access through the secondary user method described in this section.

Will I be able to control what secondary or third-party users are allowed to do on the account?

Yes. As primary user, you control the settings for all access to your account. You can choose to allow other users only to view your tax account information, file returns, make payments, or to file and pay. The primary user will be responsible for any maintenance needed to secondary or third-party users.

What happens if our company needs to change the primary user?

The department can reset your company's primary user on your MyTax Illinois account. For assistance with changing your company's MyTax Illinois primary user, call us at **217 785-3707**.

What are the benefits of using MyTax Illinois to file returns and make payments?

MyTax Illinois has the following features that make filing returns and making payments easier.

- Filing your original return using MyTax Illinois allows you to file any amended returns needed on that period electronically as well. **Note:** Any corrections to original returns filed on paper, including older periods, will have to be filed using the paper amended forms available on our website.

- Many of the calculation fields on returns will compute automatically, which reduces math errors.

- Returns can be saved and edited at a later time before they are submitted or canceled.

- There are helpful tips available for many of the lines where common mistakes are made. These tips can be viewed or hidden by clicking on the blue question mark icon next to the lines.

- Multiple payments can be scheduled in advance, and changes can be made, as necessary, or the payment can be canceled, up to 2 business days prior to the date of debit.

- Fields that contain errors are displayed in red, providing a clear indication where changes must be made before the return or payment is submitted.

What can I expect my returns to look like in MyTax Illinois?

When filing your returns, you will be required to provide the same information that we currently ask for. Providing this information electronically does change the appearance of the information during your filing session because it has been developed to save you time and to help ensure accuracy. You can expect to see some information pre-populated for you as well as the use of drop down menus, check boxes, and hyperlinks to make your filing experience more efficient.

When viewing previously filed periods, returns will look nearly identical to the paper forms you are accustomed to seeing. We will add a special header at the top of each page to provide pertinent information such as confirmation number and date of submission.

Do **not** send paper copies of returns you have filed electronically.

Will I still be able to use the WebFile and WebPay applications?

WebFile - Access to our WebFile program for Form ST-1 will remain available until September 23, 2012. After that time, MyTax Illinois will be the only method available for free electronic filing on our website at **tax.illinois.gov**.
Note: Access to WebFile will remain available for taxes that are not part of Phase 1.

WebPay - Access to WebPay for all sales, use, and other related taxes will remain available for a short period of time after MyTax Illinois comes up to allow time for the transition to the new system. **Note:** Access to WebPay will remain available for taxes that are not part of Phase 1.

Are there any helpful tips that will make using MyTax Illinois easier?

MyTax Illinois has several features that will make use easier. Following are just a few items that are especially important to remember.

- HYPERLINKS - Use hyperlinks (words in blue font that are underlined) to go directly to the page where the stated action can take place.

- NAVIGATION - Do not use your Internet browser arrows to navigate while you are logged into MyTax Illinois. Use the hyperlinks that are located in the left margin and throughout the rest of the page.

- TABS - Use tabs in MyTax Illinois to display additional information on each page. It is important that you familiarize yourself with each of the tabs and sub-tabs so that you have complete information.

- HELP - If you get "stuck", use the on-page tips and the help document provided in the left margin to understand what is needed or what is being displayed.

Are there any new terms I need to know that will make using MyTax Illinois easier?

- **Requests** - Each action you authorize on your MyTax Illinois account (making a payment, filing a return, *etc.*) is considered a web request. The tab labeled "requests" will show all actions and will be your "record keeping" location for MyTax Illinois actions only.

- **Activity** - The tab labeled "activity" will show all requests that have been passed to the department and, if processed, any changes the department made. This tab will display all actions on your IDOR account, even if those activities were initiated outside of the MyTax Illinois system. The "status" column in this tab will be a helpful tool in determining whether your return has been fully processed by the department. **Note:** The department transfers certain requests only once a day, so most requests do not occur immediately. These requests are considered pending at the time they are made (*e.g.* payments you have scheduled for the future or actions that have not been transferred to the department) and will not show in the "activity" tab until the daily retrieval is done by the department or the date of payment.

- **Messages** - The tab labeled "messages" is similar to an email inbox. IDOR will use this feature to send one-way communications to you, and this tab will serve as your inbox for these communications. You cannot reply to these messages.

- **Letters** - The tab labeled "letters" will contain copies of correspondence mailed to you by IDOR. This tab will be helpful if you lose or misplace a piece of correspondence. In addition, if you set up your tax preparer as a secondary or third-party user, they will have access to the correspondence without the hassle of delivery.

- **Manage my web profile** - The hyperlink in the left navigation bar labeled "manage my web profile" will be used for all management regarding the primary, secondary, and third-party users on your company's MyTax Illinois account. With this hyperlink, you also can manage your stored bank account information.