



Informational Bulletin

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Online Account Management System Includes Individual Income Tax

***To all tax professionals and taxpayers
filing Illinois Individual Income Tax***

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



Look for
this logo!

For information or forms

Visit our website 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

Beginning September 30, 2013, *MyTax Illinois* will be available for individual income tax filers. *MyTax Illinois* is an online account management program for taxpayers that provides a centralized location on the Illinois Department of Revenue (IDOR) website for taxpayers to manage their tax accounts, file returns, make payments, and register a new business.

What am I able to do using MyTax Illinois?

In MyTax Illinois, you are able to

- file and view your Form IL-1040, Individual Income Tax Return, and all supporting schedules (including schedules not previously supported by the WebFile program, such as the Schedule NR for part-year and nonresidents);
- print a copy of your tax return;
- schedule, view, and change electronic payments, including estimated payments, extension payments, and balance due payments;
- look up your Illinois Personal Identification Number (IL-PIN);
- view correspondence received from the Illinois Department of Revenue;
- view account information including refund information and balances;
- view your Illinois 1099-G information. (Your 1099-G is the notification that you receive from us if you have a refund that you may be required to report as income to the Internal Revenue Service.)

Note: Filing, viewing, and printing your Form IL-1040, Individual Income Tax Return, can be done without creating a username and password. However, other functions such as viewing correspondence and making estimated and extension payments require you to create a *MyTax Illinois* account.



Will I still be able to use the WebFile application?

No. Access to our WebFile application for individual income tax will no longer be available. *MyTax Illinois* is replacing the WebFile program and will offer more accessibility to your account.

Can I use *MyTax Illinois* to file my return if I am a nonresident, in a civil union, or have other special circumstances?

Yes. You are able to use *MyTax Illinois* if

- you are a nonresident or part-year resident and have an IL-PIN;
- your filing status is single for federal income tax purposes, but married for Illinois purposes because you are in a civil union; or
- you have income or deductions that require additional schedules or forms not allowed by our WebFile application in prior years, such as Schedule NR, Schedule CR, Schedule CU, Schedule K-1-P, Schedule K-1-T, Schedule F, Schedule 4644, Schedule 4255, and Schedule 1299-C.

Note: If you do not have a valid Illinois Driver's License or Illinois State Identification Card, and have not previously filed an Illinois Income Tax return, you **cannot** use *MyTax Illinois* to file your return. You can use a tax preparer, tax-prep software, or file by paper. After you file your first Illinois Income Tax return, you will be able to file on *MyTax Illinois* the following year.

How do I access *MyTax Illinois*?

To access *MyTax Illinois*, go to tax.illinois.gov and click on the *MyTax Illinois* logo.

New users: Refer to the **Authentication Guide** on the *MyTax Illinois* homepage to assist you in activating your account.

When you are ready to activate, click on the "Sign up Now!" button, complete all required fields, and then click "Submit". After we verify your submitted information, we will send you an email message giving you the authorization code needed for your initial login. The authorization code is only required the first time you login.

To prevent email communication from us being filtered into a spam or junk mail folder, add

Rev.DoNotReply@illinois.gov to your contacts or safe list. We also recommend updating your internet browser to the most recent version to ensure that all features of *MyTax Illinois* run smoothly on your computer.

If you have trouble activating your *MyTax Illinois* account, call us at **1 800 732-8866**.

What if I have already activated a *MyTax Illinois* account?

You can add your individual income tax account to your existing *MyTax Illinois* account by signing on to your account; choosing the "Add Access to Another Account" link in the left side bar; and following the instructions. Your individual income tax account will not be automatically added to your *MyTax Illinois* account. This is a security measure to protect your personal individual income tax information.

Note: If you are a sole proprietor and have granted secondary or third-party access to another *MyTax Illinois* user, access to your individual income tax account will not automatically be given. The user must complete the "Add Access to Another Account" process.

Must I create a separate *MyTax Illinois* account for each tax type I file?

Each tax type you file can be added to your *MyTax Illinois* account. However, only **one** *MyTax Illinois* account can be created per federal employer identification number (FEIN) or Social Security number (SSN). If your business is registered under a FEIN, you can also create a separate account for your individual income tax under your SSN. *MyTax Illinois* allows the master user to grant access rights to secondary and third-party users.

Should I expect any other changes to *MyTax Illinois*?

Yes. With *MyTax Illinois*, IDOR is putting more control of your tax accounts into your hands. Look for more information on future updates at tax.illinois.gov and on the home screen for *MyTax Illinois*.

Where can I look for more information about *MyTax Illinois*?

Go to tax.illinois.gov to

- access the *MyTax Illinois* Authentication Guide, Security Information, and Help links on the *MyTax Illinois* home screen; and
- view Informational Bulletins FY 2013-02, FY 2013-10, and FY 2013-14 for *MyTax Illinois* information for business income, withholding income, excise, and sales tax.