



Presenters: Brenda Towers - Power of Attorney IL-2848  
Kendra Banning - MyTax Illinois Enhancements  
Courtney Eccles - Secure Choice Savings Program  
Whitney Elders - Withholding Income Tax Changes  
Kevin Richards - 2017 Income Tax Refunds & PTIN Implementations

# Illinois Power of Attorney

Brenda Towers, Program Administrator for Taxpayer Services

## What is the Illinois Power of Attorney

- Form submitted to Illinois Department of Revenue
- Allows designated person to discuss specific taxes and years
- Used if Third Party Designee is not identified or has expired
- Not necessary for Business and Withholding Income Taxes or Sales Tax if security information provided

## What is Security Information?

- Business name
- Business address
- FEIN or Account ID

PLUS

- Exact dollar amount from return in question

Or

- Payment amount and approximate date

Or

- VIN/Hull ID/Tail Number

## How do I complete a Power of Attorney?

### Step 1: Complete the following taxpayer information (\* indicates required field)

1 Taxpayer's name*	3 Taxpayer's street address
2 Taxpayer's identification number(s)*	City State ZIP

- Must be completed
- If more than one taxpayer
  - All names
  - All Social Security Numbers

**Example:**  
 Married filing jointly - both husband's and wife's names and social security numbers must be listed in Step 1 and both need to sign in Step 4

## How do I complete a Power of Attorney?

### Step 2: Complete the following information (\* indicates required field)

4 The taxpayer named above appoints the following representatives as attorneys-in-fact:

Name*	Name*	Name*
Name of firm <i>If applicable</i>	Name of firm	Name of firm
Street address*	Street address*	Street address*
City* State* ZIP*	City* State* ZIP*	City* State* ZIP*
( ) Daytime phone number*	( ) Daytime phone number*	( ) Daytime phone number*
<i>Not necessary but helpful</i> E-mail address	E-mail address	E-mail address
Specific tax type* Year or period*	Specific tax type* Year or period*	Specific tax type* Year or period*

- All other information is required

## How do I complete a Power of Attorney?

5 The attorneys-in-fact named above **do not** have the power to do the following:

Check only the items below you **do not** wish to grant.

- endorse or collect checks in payment of refunds.
- receive checks in payment of any refund of Illinois taxes, penalties, or interest.
- execute waivers (including offers of waivers) of restrictions on assessment or collection of deficiencies in tax and waivers of notice of disallowance of a claim for credit or refund.
- execute consents extending the statutory period for assessments or collection of taxes.
- delegate authority or substitute another representative.
- file a protest to a proposed assessment.
- execute offers in compromise or settlement of tax liability.
- represent the taxpayer before the Illinois Department of Revenue in all proceedings including hearings (requiring representation by an attorney) pertaining to matters specified above.
- obtain a private letter ruling on behalf of the taxpayer.
- perform other acts. (explain) \_\_\_\_\_

Please note that you only check boxes when you want to restrict powers from the representative identified in Step 2

## How do I complete a Power of Attorney?

**Step 3: Complete the following if the power of attorney is granted to an attorney, a certified public accountant, or an enrolled agent**

I declare that I am not currently under suspension or disbarment and that I am

- a member in good standing of the bar of the highest court of the jurisdiction indicated below; or
- duly qualified to practice as a certified public accountant in the jurisdiction indicated below; or
- enrolled as an agent pursuant to the requirements of United States Treasury Department Circular Number 230.

Check one: <input type="checkbox"/> Attorney <input type="checkbox"/> C.P.A. <input type="checkbox"/> Enrolled agent	_____	_____	_____
	Jurisdiction (state(s), etc.)	Signature	Date
Check one: <input type="checkbox"/> Attorney <input type="checkbox"/> C.P.A. <input type="checkbox"/> Enrolled agent	_____	_____	_____
	Jurisdiction (state(s), etc.)	Signature	Date
Check one: <input type="checkbox"/> Attorney <input type="checkbox"/> C.P.A. <input type="checkbox"/> Enrolled agent	_____	_____	_____
	Jurisdiction (state(s), etc.)	Signature	Date

- If listed in Step 2 and an attorney, CPA or EA, then must complete Step 3



## How do I complete a Power of Attorney?

- Missing or incomplete information
  - Call
- OR
- Email
- Resubmit with corrected information

## How do I submit a Power of Attorney?

- Faxed - 217-782-4217
- Emailed - [rev.poa@Illinois.gov](mailto:rev.poa@Illinois.gov)
- Please allow 3 business days for processing

Let us know what you think...



## New Phone Survey

## MyTax Illinois Enhancements

Kendra Banning, GenTax Business Lead

## Adding Third Party Access to Another Taxpayer's Account in MyTax Illinois

- Log into MyTax Illinois.
- Within the I Want To panel, click on the **Add Access to Another Account** hyperlink.
- Complete the required fields.
- Click the **Submit** button to complete your request.
- Once submitted, a confirmation message is displayed with your confirmation number. The request should be processed momentarily. A confirmation email will be sent to you when the request has been processed.

## Current Customer View

The screenshot displays the MyTax Illinois user interface. On the left is a navigation menu with options like Home, My Accounts, and I WANT TO (Manage My Web Profile, Add Access to Another Account, etc.). The main content area is divided into sections: TAXPAYER SUMMARY, NAMES AND ADDRESSES, and I WANT TO... (Profile). Below these is a QUICK FILE table showing tax return details.

Id	Account Type	Period	Return Type	Return Status	Messages	Due Date
96-6456456-000	Withholding	9/30/2016	IL-941 Qtr Withhold		<a href="#">File Now</a>	<a href="#">File Return</a> 10/31/2016
0000-0001	ST-1	9/30/2016	ST1 Return		<a href="#">File Now</a>	<a href="#">File Return</a> 10/20/2016
0000-0001	ST-1	8/31/2016	ST1 Return	Overdue	<a href="#">File Now</a>	<a href="#">File Return</a> 9/20/2016
0000-0001	ST-1	7/31/2016	ST1 Return	Overdue	<a href="#">File Now</a>	<a href="#">File Return</a> 8/20/2016
96-6456456-000	Withholding	6/30/2016	IL-941 Qtr Withhold	Overdue	<a href="#">File Now</a>	<a href="#">File Return</a> 9/1/2016
96-6456456-000	Withholding	3/31/2016	IL-941 Qtr Withhold	Overdue	<a href="#">File Now</a>	<a href="#">File Return</a> 5/2/2016

Below the table, there are sections for ACCOUNTS (MY ACCOUNT), REQUESTS, MESSAGES (1), and LETTERS (1). A section titled 'SELECT AN ACCOUNT ID BELOW TO VIEW DETAILS' shows a table with columns for Account Id, Account Type, Name, Frequency, Address, and Balance.

Account Id	Account Type	Name	Frequency	Address	Balance
96-6456456-000	Withholding	LEGAL NAME INC	Quarterly	101 W JEFFERSON ST SPRINGFIELD IL E	0.00
0000-0001	ST-1	LEGAL NAME INC	Monthly	101 W JEFFERSON ST SPRINGFIELD IL E	0.00
96-6456456	Business	LEGAL NAME INC	Annual	101 W JEFFERSON ST SPRINGFIELD IL E	0.00

At the bottom, there is a 'Field Color Guide' with icons for Required (yellow), Optional (green), Calculated (blue), Needs correction (red), Field help (blue), Caution (yellow), and Attention Needed (red).

# Updated Customer View

**MyTaxIllinois** IDOR Home | Help | Contact Us | Privacy Policy

Menu My Accounts Log Off

**CORPORATION** My Web Profile

96-6456456  
LEGAL NAME INC  
101 W. JEFFERSON ST  
SPRINGFIELD, IL 62702-5145

**ALERTS**

- There are 4 unread letters
- File Now: IL-941 Ctr. Withhold for 9/30/2016
- File Now: IL-941 Ctr. Withhold for 9/30/2016
- File Now: ST-1 Return for 8/31/2016
- File Now: ST-1 Return for 8/31/2016
- File Now: ST-1 Return for 7/31/2016
- There are 2 more alerts

**I WANT TO**

- Add Access to Another Account
- Pay Multiple Accounts
- Manage Payments and Returns
- Update Contacts
- Update Owners/Officers
- Register for New Tax Accounts
- Reopen an Existing Account
- Renew CT License

**SUMMARY** RECENT ITEMS NAMES AND ADDRESSES

**MY ACCOUNTS**

Account Type	Account ID	Legal Name	Balance
Business	96-6456456	LEGAL NAME INC	0.00
ST-1	0000-0001	LEGAL NAME INC	0.00
Withholding	96-6456456-000	LEGAL NAME INC	0.00

Field Color Guide: Required Optional Calculated Needs correction Field help Caution Attention Needed

# Current Account View

**MyTaxIllinois** IDOR Home | Help | Contact Us | Privacy Policy

Menu Log Off

**ST-1**

Federal Employer ID #: 96-6456456  
Legal Name: LEGAL NAME INC  
Legal Address: 101 W. JEFFERSON ST SPRINGFIELD, IL 62702-5145

Monthly My Balance: \$0.00  
Pending: \$0.00  
Payment Source: Setup

**PERIODS** REQUESTS ACTIVITY MESSAGES LETTERS

**ALL PERIODS** ATTENTION NEEDED

Period	Return Status	Tax	Penalty	Interest	Credits	Balance	Messages
12/31/2016	File Now	Pay	0.00	0.00	0.00	0.00	File Return
11/30/2016	File Now	Pay	0.00	0.00	0.00	0.00	File Return
10/31/2016	File Now	Pay	0.00	0.00	0.00	0.00	File Return
9/30/2016	File Now	Pay	0.00	0.00	0.00	0.00	File Return
8/31/2016	Overdue	File Now	Pay	0.00	0.00	0.00	File Return
7/31/2016	Overdue	File Now	Pay	0.00	0.00	0.00	File Return
6/30/2016	Overdue	File Now	Pay	0.00	0.00	0.00	File Return
5/31/2016	Overdue	File Now	Pay	0.00	0.00	0.00	File Return
4/30/2016	Overdue	File Now	Pay	0.00	0.00	0.00	File Return
3/31/2016	Overdue	File Now	Pay	0.00	0.00	0.00	File Return
2/29/2016	Overdue	File Now	Pay	0.00	0.00	0.00	File Return
1/31/2016	Overdue	File Now	Pay	0.00	0.00	0.00	File Return
12/31/2015	Overdue	File Now	Pay	0.00	0.00	0.00	File Return
11/30/2015	Overdue	File Now	Pay	0.00	0.00	0.00	File Return
10/31/2015	Overdue	File Now	Pay	0.00	0.00	0.00	File Return
9/30/2015	Overdue	File Now	Pay	0.00	0.00	0.00	File Return
8/31/2015	Overdue	File Now	Pay	0.00	0.00	0.00	File Return
7/31/2015	Overdue	File Now	Pay	0.00	0.00	0.00	File Return

Field Color Guide: Required Optional Calculated Needs correction Field help Caution Attention Needed

# Updated Account View

**MyTaxIllinois** IDOR Home | Help | Contact Us | Privacy Policy

Menu My Accounts » Account: 0000-0001 Log Off

ST-1  
0000-0001  
LEGAL NAME INC  
101 W JEFFERSON ST  
SPRINGFIELD IL 62702-5145

**ACCOUNT ALERTS**

- Return needs to be filed for 9/30/2016
- Return needs to be filed for 5/31/2016
- Return needs to be filed for 7/31/2016
- Return needs to be filed for 6/30/2016
- Return needs to be filed for 5/31/2016
- Return needs to be filed for 4/30/2016
- There are 32 more alerts

**I WANT TO**

- File a Return
- Manage Payments and Returns
- Make a Payment

**ACCOUNT MAINTENANCE**

- Claim Disaster Relief
- Update Contacts
- Update Responsible Parties
- Maintain Locations
- Request to Close Account

Need help using this site?

Field Color Guide: Required Optional Calculated Needs correction Field help Caution Attention Needed

LAST 12 PERIODS	ALL PERIODS	RECENT ITEMS	NAMES AND ADDRESSES	LOGONS
12/31/2015	0.00			
11/30/2015	0.00			
10/31/2015	0.00			
9/30/2015	0.00			
8/31/2015	0.00			
7/31/2015	0.00			
6/30/2015	0.00			
5/31/2015	0.00			
4/30/2015	0.00			
3/31/2015	0.00			
2/29/2015	0.00			
1/31/2015	0.00			
28 more periods need attention				

# New Period View

**MyTaxIllinois** IDOR Home | Help | Contact Us | Privacy Policy

Menu My Accounts » Account: 0000-0001 » 9/30/2016 Log Off

PERIOD 9/30/2016

ST-1  
0000-0001  
LEGAL NAME INC  
101 W JEFFERSON ST  
SPRINGFIELD IL 62702-5145

**PERIOD ALERTS**

- Return needs to be filed for 9/30/2016

**I WANT TO**

- File or Amend a Return
- Make a Payment

Need help using this site?

**SUMMARY**

Balance 0.00

**PERIOD ACTIVITY**

There has been no activity

Field Color Guide: Required Optional Calculated Needs correction Field help Caution Attention Needed

# Current Payment View

# Updated Payment View

# Secure Choice Savings Program

Courtney Eccles, Project Manager-Secure Choice Savings Program

## Secure Choice Savings Program

- Retirement savings vehicle for private sector workers.
- Applies to businesses that :
  - Have **25 or more employees**,
  - Have been **operating in Illinois for at least 2 years**, and
  - Don't offer a qualified savings plan.

## Secure Choice Savings Program

- Employers will auto-enroll their employees into the program.
- Employees can opt-out at any time.
- Default Option - 3% contribution into Roth IRA Target Date Fund.

## Secure Choice Savings Program

- **Employers will:**
  - Facilitate enrollment
  - Hand out Program packets
- **Employers will NOT:**
  - Have any administrative or managerial obligations
  - Make any contributions
  - Pay any fees or costs associated with the program

## Secure Choice Savings Program

- Program is managed by a 7 person board, with the Illinois State Treasurer serving as Chair, and Treasurer's Office providing administrative support.
- Day to day management by a private financial services organization.
- Program implementation is underway.
- Program rollout expected in 2018 - phased enrollment beginning with a pilot (many employers may not begin participating until 2019).

## Secure Choice Savings Program

- In the process of fact sheet and FAQ
- Treasurer's Website includes a page for Secure Choice ([www.illinoisretirement.gov](http://www.illinoisretirement.gov))
- Website will be updated with new information as Board continues to finalize decisions.

# Withholding Income Tax Changes

Whitney Elders, WIT Project Manager

## Withholding Income Tax Changes

- Elimination of annual filing option and annual payment option
- Compliance Reporting Checkbox for Illinois State Treasurer's Secure Choice Savings Program Act
- Capture payroll dates

Withholding Income Tax Changes

Effective January 1, 2017,

ALL

IL-941 returns will be filed

QUARTERLY

Withholding Income Tax Changes

Effective January 1, 2017 –

ALL

IL-501 payments will be

MONTHLY

or

SEMI-WEEKLY

## Withholding Income Tax Changes

# IL-941, Step 2, Line C added

### C Check Box C if

- you **are not** subject to the Illinois Secure Choice Savings Program Act (820 ILCS 80/), or
- you **are** subject to the Illinois Secure Choice Savings Program Act (820 ILCS 80/) and you offer a qualified retirement savings plan, such as a pension or 401(k), to your employees.

For more information, see the instructions or go to [illinoisretirement.gov](http://illinoisretirement.gov).

c

### Step 1: Provide your information

Federal employer identification number (FEIN) \_\_\_\_\_ Seq. number \_\_\_\_\_

Business name \_\_\_\_\_

C/O \_\_\_\_\_

Mailing address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Check this box if this is your first return.

Check this box if your business name has changed.

Check this box if your address has changed.

#### Reporting Period

Check the quarter you are reporting.

- 1st** (January/February/ March) due May 1, 2017
- 2nd** (April/May/June) due July 31, 2017
- 3rd** (July/August/September) due October 31, 2017
- 4th** (October/November/December) due January 31, 2018

### Step 2: Tell us about your business

**A** Enter the total number of W-2 forms reporting Illinois withholding you were required to issue for the entire year. Only complete this line when you file your **4th quarter** or final return.

A \_\_\_\_\_

**B** If your business has **permanently** stopped withholding because it has closed, or you no longer pay Illinois wages or withhold Illinois taxes from other payments, check Box B and enter the date you stopped withholding.

B  \_\_\_\_ / \_\_\_\_ / 2017  
Month Day

**C** Check Box C if

- you **are not** subject to the Illinois Secure Choice Savings Program Act (820 ILCS 80/), or
- you **are** subject to the Illinois Secure Choice Savings Program Act (820 ILCS 80/) and you offer a qualified retirement savings plan, such as a pension or 401(k), to your employees.

For more information, see the instructions or go to [illinoisretirement.gov](http://illinoisretirement.gov).

C

## Withholding Income Tax Changes

### IL-941, Step 4 –

- Enter amount withheld for each pay date
- Total by month and by quarter
- Penalties

#### Step 3: Tell us about the amount subject to withholding

1 Enter the total dollar amount subject to Illinois withholding tax this reporting period, including payroll, compensation, and other amounts. See instructions. 1 \_\_\_\_\_

#### Step 4: Tell us about the amount withheld

2 Enter the exact amount of Illinois Income Tax you actually withheld from your employees or others on the date you paid the compensation. Only enter amounts on days you made withholding - leave the remaining "Day" lines blank. If you withheld no Illinois Income Tax during the month, enter "0" on the corresponding "Total" line - Line 2a, 2c, or 2d (noted by "◆").

2a First month of quarter (i.e., January for 1st quarter; April for 2nd quarter; July for 3rd quarter; and October for 4th quarter)

Day	Amount	Day	Amount	Day	Amount	Day	Amount
1 _____	_____	9 _____	_____	17 _____	_____	25 _____	_____
2 _____	_____	10 _____	_____	18 _____	_____	26 _____	_____
3 _____	_____	11 _____	_____	19 _____	_____	27 _____	_____
4 _____	_____	12 _____	_____	20 _____	_____	28 _____	_____
5 _____	_____	13 _____	_____	21 _____	_____	29 _____	_____
6 _____	_____	14 _____	_____	22 _____	_____	30 _____	_____
7 _____	_____	15 _____	_____	23 _____	_____	31 _____	_____
8 _____	_____	16 _____	_____	24 _____	_____		

Total Illinois Income Tax withheld this month. (Add Section 2a, Lines 1-31.) ◆ 2a \_\_\_\_\_ ◆

**Step 4: Continued**

2b Enter the amount from Page 1, Step 4, Line 2a. 2b \_\_\_\_\_  
 2c Second month of quarter (i.e., February for 1st quarter; May for 2nd quarter; August for 3rd quarter; and November for 4th quarter)

Day	Amount	Day	Amount	Day	Amount	Day	Amount
1	_____	9	_____	17	_____	25	_____
2	_____	10	_____	18	_____	26	_____
3	_____	11	_____	19	_____	27	_____
4	_____	12	_____	20	_____	28	_____
5	_____	13	_____	21	_____	29	_____
6	_____	14	_____	22	_____	30	_____
7	_____	15	_____	23	_____	31	_____
8	_____	16	_____	24	_____		

Total Illinois Income Tax withheld this month. (Add Section 2c, Lines 1-31.) ◆ 2c \_\_\_\_\_ ◆

2d Third month of quarter (i.e., March for 1st quarter; June for 2nd quarter; September for 3rd quarter; and December for 4th quarter)

Day	Amount	Day	Amount	Day	Amount	Day	Amount
1	_____	9	_____	17	_____	25	_____
2	_____	10	_____	18	_____	26	_____
3	_____	11	_____	19	_____	27	_____
4	_____	12	_____	20	_____	28	_____
5	_____	13	_____	21	_____	29	_____
6	_____	14	_____	22	_____	30	_____
7	_____	15	_____	23	_____	31	_____
8	_____	16	_____	24	_____		

Total Illinois Income Tax withheld this month. (Add Section 2d, Lines 1-31.) ◆ 2d \_\_\_\_\_ ◆

Add Lines 2b, 2c, and 2d and enter the total amount here. This is the total dollar amount of Illinois Income Tax actually withheld from your employees or others for this quarter. 2 \_\_\_\_\_

**Step 5: Tell us about your payments and credits**

- 3 Enter the amount of credit through DCEO you are using this period. See instructions. 3 \_\_\_\_\_
- 4 Enter the total dollar amount of withholding payments you made to the Illinois Department of Revenue (IDOR) for this period. This includes all IL-501 payments (electronic and paper coupons). Do not estimate this amount. 4 \_\_\_\_\_
- 5 Enter the amount of IDOR-approved credit you are using this period. Credits are only valid if you received written confirmation from IDOR. See instructions. 5 \_\_\_\_\_
- 6 Add Lines 3, 4, and 5 and enter the total amount here. 6 \_\_\_\_\_

**Step 6: Figure your balance**

- 7 If Line 2 is greater than Line 6, subtract Line 6 from Line 2. This is your remaining balance due. Make your payment electronically or make your remittance payable to "Illinois Department of Revenue." If Line 6 is greater than Line 2, see the instructions. (Semi-weekly payers must pay electronically.) 7 \_\_\_\_\_

**Step 7: Sign here**

Under penalties of perjury, I state that, to the best of my knowledge, this return is true, correct, and complete.

Check this box if we may discuss this return with the paid preparer shown in this step.

Signature \_\_\_\_\_ (\_\_\_\_\_) / \_\_\_\_ / \_\_\_\_  
 Daytime telephone number Month Day Year

Paid Preparer (please print) \_\_\_\_\_ PTIN \_\_\_\_\_ (\_\_\_\_\_) / \_\_\_\_ / \_\_\_\_  
 Daytime telephone number Month Day Year



## Withholding Income Tax Changes

### IL-941-X

- Changing amount subject to withholding
- Longer processing time
- Attach payroll records or W-2s
- Two page, one column form

### IL-2000

- Overpaid on original return
- Faster processing
- Attach payroll records or W-2s
- No numbers on form

## Electronic W-2 Update

- **Mandatory** for all payroll providers who file payroll returns and complete W-2s for employers of any size and any employer who is required to electronically transmit W-2s to the federal government (Social Security Administration).
- **Voluntary** for employers who do not meet the above requirements.
- **Files due February 15<sup>th</sup>.**
  - 39 Ill. Reg. 6884 (May 15, 2015)
- Visit IDOR's W-2 Program webpage for additional information.

## What has changed...

- IL-941
- FY Bulletin 2017-07
- IL-941 Instructions
- IL-941-X
- IL-941-X Instructions
- IL-501
- Publications 110, 121, 130 & 131
- Web page
- Taxpayer Answer Center

## PTIN Implementation & Refund Release for 2017

Kevin Richards - Program Administrator for Account Processing

- PTIN Implementation
- Refund Release for 2017 Processing Season

