Illinois Department of Revenue

MyTax Illinois Non-Login Bulk Upload Submission Guide EFW2/EFW2C/FIRE Format

December 2023
Illinois Department of Revenue
101 West Jefferson Street
Springfield, Illinois 62702

IDR-996 (N-12/23) - Printed by authority of the state of Illinois, web only, 1.

Table of Contents

IyTax Illinois Non-Login Bulk Upload Submission Guide EFW2/EFW2C/FIRE Format	
Navigation	
Testing	
Additional Information to Assist with Submission Process	
Confirmation Screen	
Retrieval of Submission Information and Withdrawal of Submission	6
Contact Information	6

Please note: This Guide only provides instructions for the submission of EFW2, EFW2C and FIRE formatted files using the new Non-Login Bulk Upload on MyTax Illinois. For information on specifications for these file formats, visit our webpage below and review <u>IDR-986</u>, <u>Forms W-2 and W-2c Electronic Transmission</u>

Program Guide and IDR-987, Forms W-2G and 1099 Illinois Electronic Transmission Program Guide:

https://tax.illinois.gov/programs/electronicservices/1099w2.html

Transmitters of information returns are now able to submit EFW2, EFW2C, and FIRE formatted files through MyTax Illinois without creating an account. This new, non-login feature supports submission from any internet browser and does not require the download of a tool for transmission. This new submission method provides real-time review and error feedback rather than a back-and-forth acknowledgment process that is typical of other transmission methods. Only error-free files will be accepted and confirmed.

See step-by-step navigation and additional program information below.

Navigation

- 1. Go to the MyTax Illinois Home Page: https://mytax.illinois.gov
- 2. Scroll to the bottom of the page to the box labeled "Non-Login Return or Report" and select "Submit Bulk W2/1099 File". This opens an active request in MyTax Illinois.
- 3. Provide the required information, follow the on-screen instructions, and navigation to complete your submission.

Testing

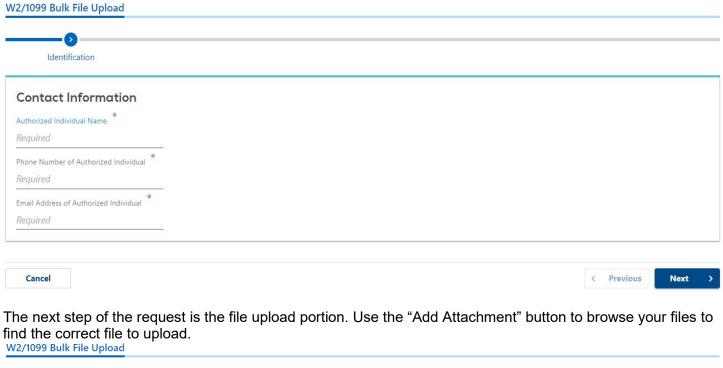
The new bulk upload process on MyTax Illinois does not require a registration for use and does not require a testing period. Only "clean" files will be allowed to be submitted, so verification of the process does not need to be completed beforehand. **You should not submit test files –** this submission process is connected to production and will be considered an official record.

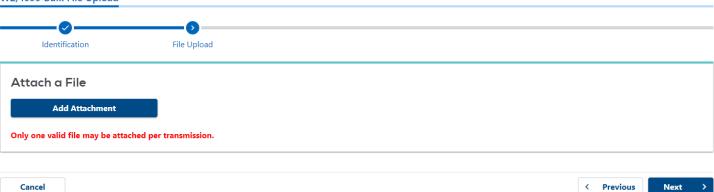
<u>Additional Information to Assist with Submission Process</u>

Each step of the submission has required fields and/or actions that must be completed before proceeding to the next step. **Only one file may be submitted per request**, but unlimited requests can be submitted. Each request receives its own unique confirmation code that can be used to retrieve the submission, if necessary.

See more step-by-step information on the following pages.

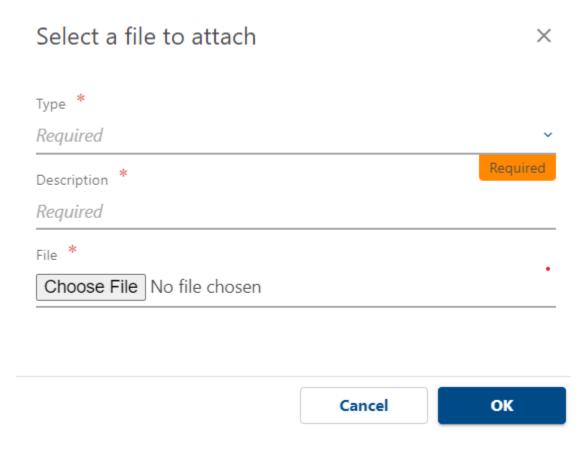
The first step simply requires the entry of the Authorized Individual name, phone number and email. When these are properly completed, the "Next" button in the lower right will allow you to proceed to the next step of the request:





After clicking the "Add Attachment" button, a modal window pops up containing additional required fields:

- A dropdown menu allows the selection of the type of file (format of file) that you are attaching
 - 1099/W2G (FIRE)
 - o W2 (EFW2)
 - o W2C (EFW2C)
- A Description field allows free form entry of information. This is a required field, but the description can be anything helpful to the submitter.
- The final field is the browsing portion of the attachment. Clicking the "Choose File" button opens your computer's folder organization. Locate the file to be attached and either double click on the file name or highlight and select "Open".



Once these three fields are completed, click the "OK" button in the lower right of the modal window. This initiates the file review process. Based on the file type selected, edits are run, and the file formatting is verified.

After the attachment is attempted, there are a few possible outcomes:

- 1. The file matches format specifications and passes all edits the file is attached to the request and displays on the screen. Verify that the file is the intended submission and click on the "Next" button to proceed to the Review Step.
- 2. The file matches the format specifications but has errors based on edits a modal window appears indicating there are errors. After clicking "Ok" on the modal window, a grid of error codes will appear with the associated record type and starting position of fields in error. After correcting the file, the "Add Attachment" button can be utilized again to initiate a new review of the file.
- 3. The file does not match format specifications a modal window appears indicating that review cannot be conducted. After clicking "Ok" on the modal window, you are returned to the page with the "Add Attachment" button to attempt another attachment.

You will only be able to proceed with submission when an error-free file is attached.

Once an error-free file is successfully attached, you will proceed to a Review Step. This allows for one more verification that the file attached is the desired file to submit. Once this is confirmed, click "Next" in the lower right portion of the screen.

To complete submission, you will be required to enter (and re-enter for verification) an email address. Entering the email addresses is also indicating that the submitter has read the perjury statement provided on the modal window and agrees to its contents. The email address is important for retrieving submission details after its complete.

Confirmation Screen

After the successful entry of email address, a confirmation screen is presented. This is the official indication that the attached file has been transmitted to the department. It contains important information about the submission, including a confirmation code. This confirmation code is critical to being able to retrieve the submission at a later date, if necessary. **Keep this information for your records**.

Retrieval of Submission Information and Withdrawal of Submission

Once a file has been submitted, it will be processed with our next "pull" of information from the system. This typically occurs at the close of business each workday (Monday through Friday, except observed holidays). After a submission is complete, the submitter can retrieve this information at any time by utilizing the "Retrieve a return, application or payment" option on the MyTax Illinois home screen. This will show the step-by-step information included in the original submission. However, the file will not be downloadable from the retrieval to ensure security of the contents within the file.

If the file has not yet been "pulled" by the system, the submitter can withdraw the submission after it has been retrieved. This will "cancel" the submission; it will not be processed. After submissions have been "pulled", withdrawal is not an option. Any correction from that point forward must be processed as a new submission of corrected information.

Contact Information

For general tax questions:

Taxpayer Assistance Division

1 800 732-8866 217 782-3336 1 800 544-5304 TTY

Business Hotline 217 524-4772

For questions concerning the Forms W-2 and W-2c Electronic Transmission Program and the Forms W-2G and 1099 Electronic Transmission Program:

Electronic Commerce Division REV.ElectronicFiling@illinois.gov