Big
Shoulders
Fund.Steps to Reserve a Tax Creditfor the Illinois Tax Credit Scholarship Program

The credits are awarded on a first come, first served basis and donors must have a MyTax Illinois account to reserve credits. Whether you contributed last year or are a first-time donor, here is what you need to know to complete the donation process.

If you have not activated an account on MyTax.Illinois.gov with the Illinois Department of Revenue, you need to:

- I. Request Letter ID
- **II. Activate Your Account**

III. Reserve Your Credit with Illinois Department of Revenue (IDOR) IV. Make Your Donation with Big Shoulders Fund

If you have activated an account with the Illinois Department of Revenue, you can go to "Reserve your credit with IDOR". Directions on this is located on page 5.

REQUEST LETTER ID

1.Visit mytax.illinois.gov

- If you already have an account, enter your username and password to verify.
- If you do NOT have an account, scroll down to the 'Individuals' box on the left.





2. Click on 'Request a Letter ID.'

Search our online services
 Search our online services
 Individuals
 Online services for individual income tax that do not require logging into MyTax Illinois. Note: You cannot file Form IL-1040 using MyTax Illinois if you do not have a logon.
 File Property Tax Rebate (Form IL-1040-PTR)
 Make an IL-1040, IL-1040-ES, or IL-505-1 payment
 Request a Letter ID

3. Enter your Social Security Number and one of the following:

- IL-PIN
- Most Recent Adjusted Gross Income
- IL Driver's License Number
- IL State Identification Number

Taxpayer Information			
IIT Letter ID Request			
Complete the information below to require the information below to require the information below to require the time that the option. If you in the second s	est your Letter ID and click submit. The Department will send a notice with your Letter ID to the address films your return and has not been undefined with the Department, you will not be able to create a My I Security Number	is filed on your most currently filed II1040 tax Tax IIInois account using the "Request a Letter ID"	
2. Please enter <u>ONE</u> of the following:			
U RONN	Prior real Adjusted cross income: Innois Univers License Number: <u>Required</u>	U IIInois state seriolication number:	
O IL-PIN	O Prior Year Adjusted Gross Income:	Illinois Drivers License Number:	O Illinois State Identification Number:

4. Click 'Submit' in the bottom right of the screen and enter your email address (two times to confirm no typos); then click 'OK' to submit and receive your confirmation.

Confirmation		×	dress filed on your most currently filed IL-1040 tax MyTax Illinois account using the "Request a Letter ID"
Submit this request? You are required to enter and confin	m your email address to verify t	his request.	
Email *			
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5. Take down your 10-digit confirmation code for your records and wait 7-10 business days for your Letter ID to arrive in the mail. Your Letter ID will be mailed to the address on your last year's tax return.

Confirmation
Congratulations! You have submitted your Letter ID request. Please note that your request may take several days to process. You should receive your letter by U.S. Postal Service in 7 to 10 days.
Your confirmation number is
Submitted On: Central Time) Request Type: IIT Letter ID Request
You may print this page for your records. This confirmation screen will not be accessible once you navigate away from this page. However, the Department will maintain a record of this request.
If you have questions, please visit our website at tax.illinois.gov or call us at 1 800 732-8866. Reference the confirmation number provided above.
Printable Confirmation
ок

ACTIVATE YOUR ACCOUNT AFTER YOU HAVE RECEIVED YOUR LETTER ID

6. Go to mytax.illinois.gov and click 'Sign Up.'



Big Shoulders Fund.

7. Select SSN, enter your Social Security Number and click submit; then click 'Yes' to begin activating your account.

- Enter your Letter ID and either your Individual IL Pin or your most recent Adjusted Gross Income (AGI). If you choose your IL PIN, click on 'Look Up My IL PIN' and go to Step 8.
- If you choose your most recent AGI, go directly to Step 9.

MyTax Illinois Activation		1			
Individual Income Tax (Letter ID)	2 New Activation				
Activation Summary	,				
FEIN SSN or ITIN	want to use to activate your my	ax minois account:			
Sales Account Id License Number					
O Service Bureau ID					
Cancel				< Previous	Submit

8. If you choose to look up your Individual IL PIN click on 'Look Up My IL PIN.'

- Enter your SSN and either your IL Driver's License
- Click 'Conduct Inquiry'
- Copy your IL PIN and then click 'Back'

9. Enter your Letter ID and your IL PIN.

When the screen expands, enter:

- Your contact information
- A username and password
- A security question and answer

10. Click 'OK' on the next screen. You will receive an email confirmation that your account was activated. Please email Rev.MyTaxHelp@Illinois.gov with questions.



RESERVE YOUR CREDIT

Only donors who have activated an account with the Illinois Department of Revenue will be able to reserve a Tax Credit.

Returning Illinois Tax Credit Scholarship Donors:

- If you have a Username from a previous year, log in using that Username and Password.
- If you cannot access your account, contact IDOR at 800-732-8866 to resolve this issue.

New Tax Credit Scholarship Donors:

• As this is your first-time logging into your account after creating it, you will need to enter the Activation Code you received from IDOR after your account was created.

11. Go to mytax.illinois.gov and click 'Log-In.'



- 12. Once logged in, you will be taken to your home screen.
- Click "view more account options."

Summary Action Center Settings More Individual Income Tax Account > File a Return CHICAGO IL 60657-1032 P16476542 Balance \$0.00	AMELIA DROZDA CHICAGO IL 60657-1032		fou list logged in on Thursday, Pay 6, 2021 TTUTTE AP Manage My Profile
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	Individual Income Tax	Account P16476542 Balance \$0.00	> File a Return



13. Under the "Account Options" section on the left-hand side of the screen, click on "Contribute to Invest in Kids."

My lax Illinois	
< AMELIA DROZDA	
More account options	
Q Search our online services	
Account Options	Periods and Submissions

14. The first screen of the application is an overview of the program.

- It asks you to acknowledge that you are not permitted to take state tax credit for any contributions that you claim as a federal deduction.
- Click the white and blue box to indicate you understand the restriction. Click the blue "Next" button in the bottom right corner.





15. Check "Invest in Kids Region" and click the blue "Next" button in the bottom right corner.

• Confirm your donation will be contributed to an Invest in Kids Region NOT a Technical Academy unless you would like to donate to a Trade School.

Apply for a Contribution Autho	orization Certificate				
⊘	0				
Invest in Kids Overview	Technical Academy				_
Will your contribution be directed to	an Invest in Kids Region or a Technical Academy?				
Invest In Kids Region	Technical Academy				
					_
Cancel		<	Previous	Next	•

16. Fill out the requested information on the "Contribution" screen.

- Designate the region to which your contribution will be directed. Big Shoulders Fund is authorized to issue scholarships in Region 1 (Cook County) and Region 2 (Northern IL Counties).
- Designate the Scholarship Granting Organization (Big Shoulders Fund).
- Contribution Pledge: Enter the full amount of the contribution to Big Shoulders Fund you intend to make (Please Note: this is the TOTAL amount you plan to donate in that region. You will then get a tax credit valued at 75% of that donation.)
- Once filled out, click Submit and re-enter your MyTax.Illinois.gov password.

Choose a Region * Required *	Region Map	
Choose a Scholarship Granting Organization		
Contribution Piedge		
Confirm Amount		
Note: We reserve the right to reduce your contri	bution amount if the region's limit for tax credits has been reach	ed.
Cancel	•	C Previous Submit

17. The final screen will be a confirmation that your application has been accepted. You may print a copy for your records.

MyTax Illinois More account options More account More account options More account More account options More account More account More account	
More account options Confirmation Xou have successfully submitted your application May processed by the Department. Your confirmation number is No Illinois Invest in Kids credit may be taken for any o You may priot this page for your records. His confirm account. Hyou have questions, please visit our website at taxA	
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If you have questions, please visit our website at tax.	nation screen will not be accessible once you navigate away from this page. However, a record of your request will remain a
	.illinois.gov or call us at 217 785-7313. Reference the confirmation number provided above.
Printable Confirmation	
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UK .	



18. Click OK to go back to account options and access Your Contribution Letter (Contribution Authorization Certificate) which you will need to make your donation with the Big Shoulders Fund.

• On your mytaxillinois home page, click "View More Account Options."

MyTax Illinois			0 0
AMELIA DROZDA	Settings More		Welcome, Amelia Drozda Manage My Profile
Individual Income Tax		Account P1676542 Balace \$0.00	File a Return Manage Phyments and Returns View more account options

19. Click on View Account Letters

MyTax Illinois		
AMELIA DROZDA		
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20. Under "Letters" you will see your "Invest in Kids Contribution Appl." This is your two page Contribution Authorization Certificate (CAC).

- Click on the link to open a PDF of your letter.
- Please download and save the PDF, as you will need it to upload on our smartsheet form or send to Big Shoulders Fund (sgo@bigshouldersfund.org)
- Please make sure the name on your CAC matches the name on the bank or investment account from which the donation is being drawn. As a reminder, under the Invest in Kids Act, corporate donors are not permitted to designate tax credit scholarship donations to specific schools.



Make Your Donation with Big Shoulders Fund

Steps To Donate

Step 1: Submit Certificate to Big Shoulders Fund

- Email to sgo@bigshouldersfund.org or
- Online form

Step 2: Make contribution:

- Check made out to Big Shoulders Fund:
 - Mail to 212 W Van Buren, Suite 900 Chicago, IL 60607
- Wire Transfer
- Stock Donation
 - Please contact Amy Drozda at <u>adrozda@bigshouldersfund.org</u> forGG more information on this option.
- Online Secured Credit Card Donation

Big Shoulders Fund will report your contribution to the Illinois Department of G Revenue. The formal Certificate of Receipt will be available through your G mytax.illinois.gov account. You will also receive an acknowledgement letter G from Big Shoulder Fund.

> Please contact us with any questions or support needs at: Email sgo@bigshouldersfund.org or Call 312.751.8337 or Visit bigshouldersfund.org/tax-credit