

Illinois Tax Credit Scholarship Donor Instructions

The Tax Credit Scholarship Program (TCS) will help low income students receive a quality Catholic education while reducing or eliminating your State of Illinois income tax liability. To take advantage of this opportunity, you will need to use the mytax.illinois.gov website to apply for the tax credit. Below outlines the process.

What is the process for donating?

Beginning on January 2, 2018, individual and corporate donors will be able to reserve tax credits through www.mytax.illinois.gov by following these steps:

1. Set up an account at www.mytax.illinois.gov. This site will have the credit application on January 2nd.
 - See the step-by-step instructions below on how to request a letter ID. Your letter ID is required before you can activate your “my tax” account.
 - See the step-by-step instructions on how to activate your “my tax” account.
2. Apply for a tax credit on www.mytax.illinois.gov as soon as the application is open on the website. Donors will need to provide at least the following information (a complete list will be provided once available):
 - Social Security Number
 - Personal (or company) name and contact information
 - Name of SGO to which he/she plans to donate (Note: The SGO of choice for the Diocese of Joliet is Empower Illinois)
 - Amount he/she plans to donate
 - Region to which he/she plans to donate
3. Donate to an SGO within 60 days of application being approved (Note: The SGO of choice for the Diocese of Joliet is Empower Illinois).
 - Designate the donation to Diocese of Joliet Catholic Schools
4. Provide certificate from the SGO to use tax credit when filing a 2018 return in 2019.

Strong interest may cause the cap to be reached within minutes of opening, as has happened in other states offering similar programs.

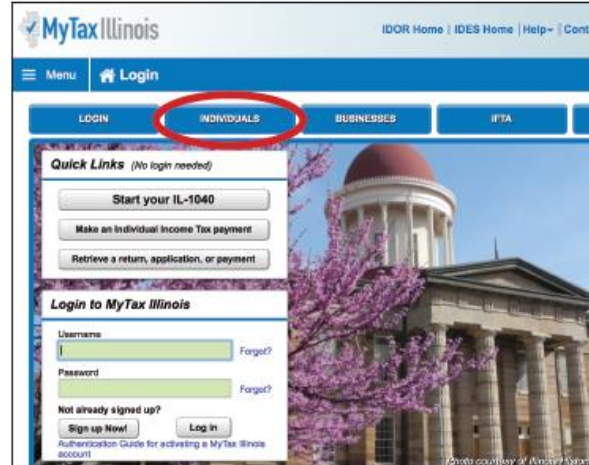
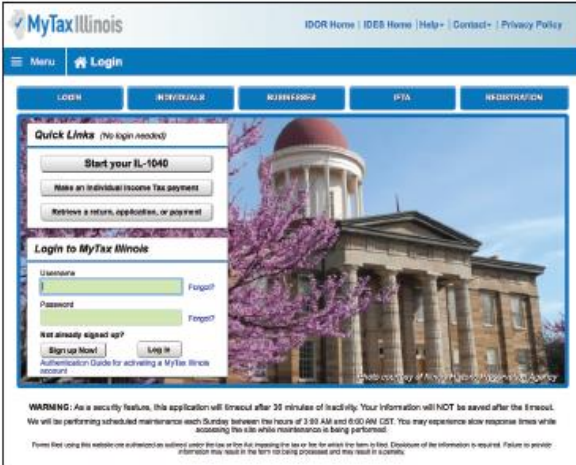
Tax Credit Scholarship Program

MyTax.Illinois.Gov — Request Letter ID

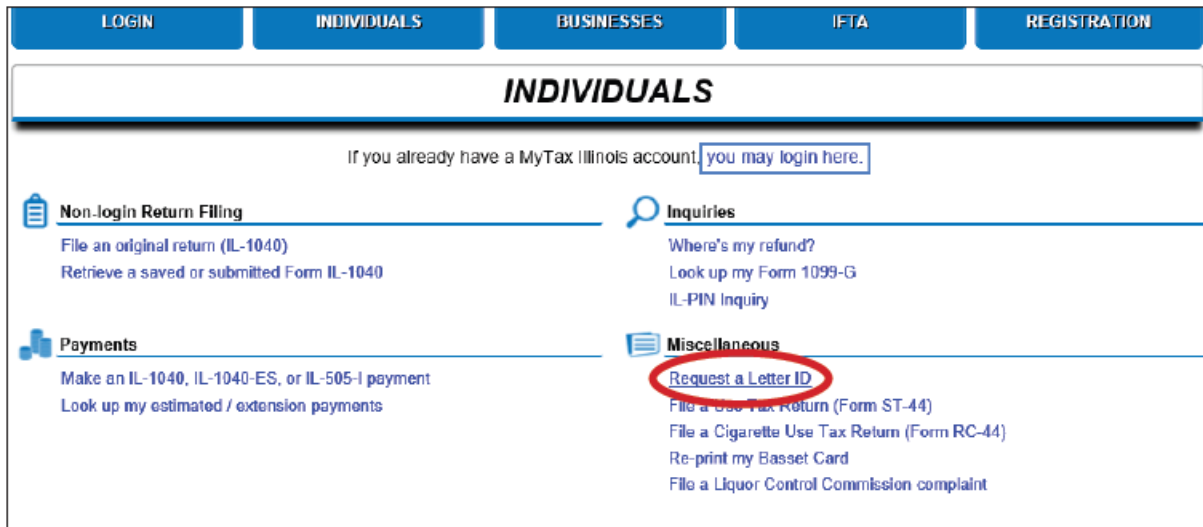
The Tax Credit Scholarship Program (TCS) will help low income students receive a quality Catholic education while reducing or eliminating your State of Illinois income tax liability. To take advantage of this opportunity, you will need to use the mytax.illinois.gov website to apply for the tax credit. **The steps below provide instructions for requesting a Letter ID, the first step toward getting an account.**

STEP 1: Log on to mytax.illinois.gov

- If you already have an account, enter your username and password to verify
- If you do NOT have an account, click on the word “Individuals” (second rectangle from the left)



STEP 2: Click on “Request a Letter ID”; the first link in the “Miscellaneous Section”



Tax Credit Scholarship Program

MyTax.Illinois.Gov — Request Letter ID Continued

STEP 3: Enter your Social Security Number and one of the following: an IL-PIN, 2016 Adjusted Gross Income, IL Driver's License Number, or IL State Identification Number.

The screenshot shows the 'Request Letter ID' form on the MyTax Illinois website. The page header includes the MyTax Illinois logo and navigation links for IDOR Home, IDES Home, Help, Contact, and Privacy Policy. The breadcrumb trail is 'Menu > Login > Individuals > Request'. There are 'Submit' and 'Cancel' buttons in the top right. The form title is 'IIT Letter ID Request'. The instructions state: 'Complete the information below to request your Letter ID and click submit. The Department will send a notice with your Letter ID to the address filed on your most currently filed IL-1040 tax return. If your address has changed since filing your return and has not been updated with the Department, you will not be able to create a MyTax Illinois account using the "Request a Letter ID" option. If you want to file your IL-1040 using MyTax Illinois, you can file here.' A note says: 'Note: You will not receive your letter ID to activate a MyTax Illinois account if you do not have a valid mailing address on file with us.' The form has two main sections: 1. Social Security Number (with a masked input field containing '***-**-8346'). 2. Please enter ONE of the following:

- IL-PIN
- Prior Year Adjusted Gross Income:
- Illinois Drivers License Number: (with a yellow 'Required' tooltip and a 'Required' tooltip with format '7999-9999-9999')
- Illinois State Identification Number:

STEP 4: Click 'Submit' and enter and confirm your email address; then click 'ok' to submit and receive your confirmation.

The first screenshot shows the 'Request Letter ID' form with a 'Submit this request?' modal dialog box. The modal asks for 'Email' and 'Confirm Email' (with a 'Required' tooltip) and has 'OK' and 'Cancel' buttons. The second screenshot shows the 'Confirmation' page. The breadcrumb trail is 'Menu > Login > Individuals > Request > Confirmation'. The page title is 'Confirmation'. The text reads: 'Congratulations! You have submitted your Letter ID request. Please note that your request will be processed in 7 to 10 days.' It provides the confirmation number '1-453-176-768', the submission date 'Submitted On: 11/10/2017 3:35:05 PM (Central Time)', and the request type 'Request Type: IIT Letter ID Request'. It also states: 'You may print this page for your records. This confirmation screen will not be accessible after 7 days of this request.' At the bottom, there are 'Printable Confirmation' and 'OK' buttons.

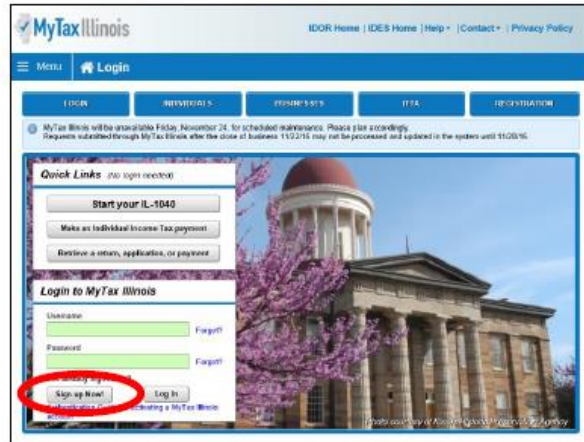
STEP 5: The Letter ID will be mailed to the address on your last year's tax return. You should receive it within 7–10 business days.

Tax Credit Scholarship Program

MyTax.Illinois.Gov — Activate Your Account

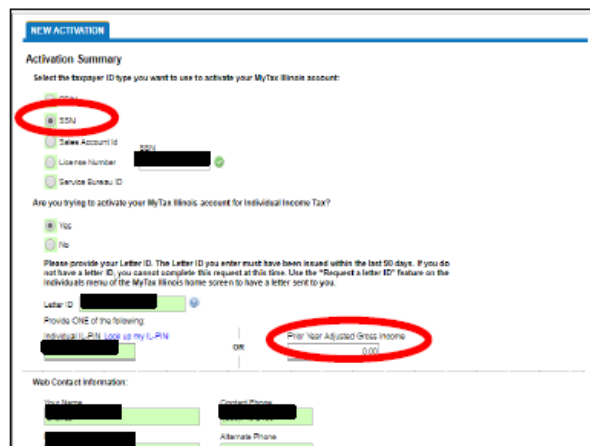
The Tax Credit Scholarship Program (TCS) will help low income students receive a quality Catholic education while reducing or eliminating your State of Illinois tax liability. To take advantage of this opportunity, you will need to use the mytaxillinois.gov website to apply for the tax credit in January. **The steps below provide instructions for signing up/activating your account once you receive your Letter ID.**

STEP 1: Log on to mytax.illinois.gov and click on “Sign Up Now” on the lower left



STEP 2: Select SSN and 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 2016 Adjusted Gross Income (AGI). If you choose your IL PIN click on “Look Up My IL PIN” and go to Step 3. If you choose your 2016 AGI go directly to Step 4.



STEP 3: If you choose to look up your Individual IL PIN click on "Look Up My IL PIN"

- Enter your Social Security Number and either your IL Driver's License or your Adjusted Gross Income from 2016
- Click "Conduct Inquiry"
- Copy your IL PIN and then click "Back"

The screenshot shows a 'Request' window titled 'IL-PIN Inquiry'. It contains the following fields and options:

- 1. Social Security number: [Redacted]
- 2. Please enter ONE of the following and confirm your entry using the checkbox:
 - Adjusted Gross Income (from most recently filed return)
 - Illinois Driver's License Number: [Redacted]
 - Illinois State Identification Number
- I confirm that this information is associated with my Social Security number.
- Buttons: 'Conduct Inquiry', 'Back', 'Cancel'

This screenshot shows the same 'Request' window, but with the 'IL-PIN' field circled in red. The 'Back' button is also visible.

STEP 4: Enter your Letter ID and your IL PIN and when the screen expands enter...

- Your contact information
- A username and password
- A security question and answer
- Confirmation of your email and password; and then **click** submit

The screenshot shows the 'Web Contact Information' and 'Web Login Information' sections. It includes fields for name, email, phone, username, password, and a security question.

The screenshot shows the 'Request' page with a 'Submit' button circled in red. Below the button is an 'Activation Summary' section.

STEP 5: Click 'OK' when the next screen pop's up and you will receive a confirmation that your account was activated.

The screenshot shows a confirmation dialog box with the text: 'Submit Activation Summary for: Charles?'. It has 'Yes' and 'No' radio buttons, and 'OK' and 'Cancel' buttons. The 'OK' button is circled in red.

The screenshot shows the 'Confirmation' page with the following text: 'Congratulations! You have submitted all the necessary information for your MyTax Illinois account activation. Your confirmation number: [Redacted]. Submitted on: 11/14/2017 4:05:10 PM (Central Time) Requested from: MyTax Illinois Console. Activation request for: Charles. You should receive an email shortly with additional information about accessing the MyTax Illinois account for which you submitted activation information. If you have questions, please visit our website at tax.illinois.gov or call us at 217-785-3100. Reference the confirmation number provided above.' There are 'Previous Confirmation' and 'OK' buttons.