



HOW TO DONATE TAX CREDIT SCHOLARSHIP PROGRAM

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 with the Illinois Department of Revenue, you need to:

1. Request Letter ID
2. Activate Your Account
3. Reserve Your Credit
4. Make Your Donation

If you have activated an account with the Illinois Department of Revenue, you can skip to page 4.

REQUEST LETTER ID

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 the 'Individuals' tab.

02. Click on 'Request a Letter ID,' under the 'Miscellaneous' section.

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

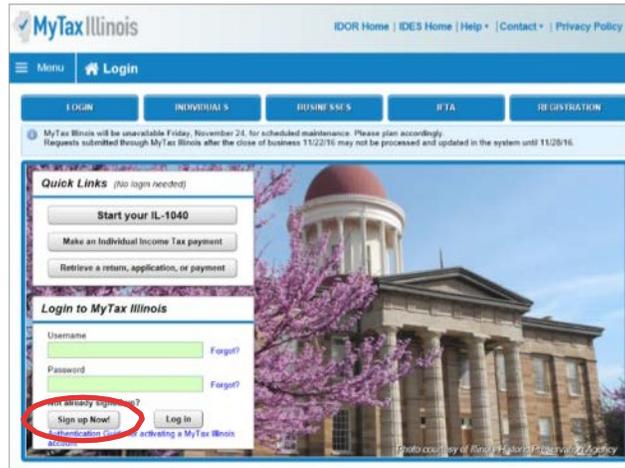
- IL-PIN
- Most Recent Adjusted Gross Income IL
- Driver's License Number
- IL State Identification Number

04. Click 'Submit' and enter and confirm your email address; then click 'OK' to submit and receive your confirmation.

05. Your Letter ID will be mailed to the address on your last year's tax return. You should receive it within 7-10 business days.

AFTER YOU HAVE RECEIVED YOUR LETTER ID ACTIVATE YOUR ACCOUNT

06. Log on to mytax.illinois.gov and click 'Sign Up Now.'



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.

A screenshot of the 'NEW ACTIVATION' page on the MyTax Illinois website. The page is titled 'Activation Summary' and asks the user to select a taxpayer ID type. The 'SSN' option is selected and circled in red. Below this, there are fields for 'Sales Account Id', 'License Number' (with a checkmark), and 'Service Bureau ID'. A question asks if the user is activating for Individual Income Tax, with 'Yes' selected. A note states: 'Please provide your Letter ID. The Letter ID you enter must have been issued within the last 90 days. If you do not have a letter ID, you cannot complete this request at this time. Use the "Request a letter ID" feature on the Individuals menu of the MyTax Illinois home screen to have a letter sent to you.' The 'Letter ID' field contains 'DXXXX21264533295'. Below this, there are two options: 'Individual IL PIN Look up my IL PIN' (with the value '17244502') and 'Prior Year Adjusted Gross Income' (with the value '\$ 0.00'). The 'Prior Year Adjusted Gross Income' option is circled in red. At the bottom, there is a 'Web Contact Information' section with fields for 'Your Name', 'Contact Phone', 'Email', and 'Alternate Phone'.

08. 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 or your most recent
- Adjusted Gross Income 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 text: 'Enter the information below to get your IL-PIN. If you are married filing jointly, you will have to enter your spouse's information separately.' Below this are two numbered steps: 1. Social Security number (with a redacted field). 2. Please enter ONE of the following and confirm your entry using the checkbox. Under step 2, there are three radio button options: 'Adjusted Gross Income (from most recently filed return)', 'Illinois Driver's License Number' (selected), and 'Illinois State Identification Number'. There is also a checked checkbox: 'I confirm that this information is associated with my Social Security number.' At the bottom of the form is a 'Conduct Inquiry' button. Below the window, there are links for 'Re-print my Basset Card' and 'File a Liquor Control Commission complaint'.

The screenshot shows the same 'Request' window titled 'IL-PIN Inquiry'. The 'Social Security Number' and 'IL-PIN' fields are redacted. The 'IL-PIN' field is circled in red. A 'Back' button is visible below the form. Below the window, there is a 'Miscellaneous' section with links: 'Request a Letter ID', 'File a Use Tax Return (Form ST-44)', 'File a Cigarette Use Tax Return (Form RC-44)', 'Re-print my Basset Card', and 'File a Liquor Control Commission complaint'.

09. 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
- Confirmation of your email and password; and then click submit

The screenshot shows two sections of a form. The 'Web Contact Information' section has fields for 'Your Name' (Charles), 'Contact Phone' (830/740-2150), 'Email' (charles.pays@gmail.com), and 'Alternate Phone'. The 'Web Logon Information' section has a 'Pick a username, you'll use this to login to MyTax Illinois:' field (ispays) with a green checkmark, a 'Pick your password:' field with a green checkmark, and a 'Password Rules' section with three bullet points: 'Minimum 8 characters, no more than 20', 'Passwords must contain both letters and numbers', and 'Passwords must be mixed case'. Below this is a security question: 'In case you forget your password: in what city does your nearest sibling live?' with a dropdown menu showing 'Chicago'. The 'Confirm Important Information' section has 'Confirm Email' (charles.pays@gmail.com) and 'Confirm Password' fields.

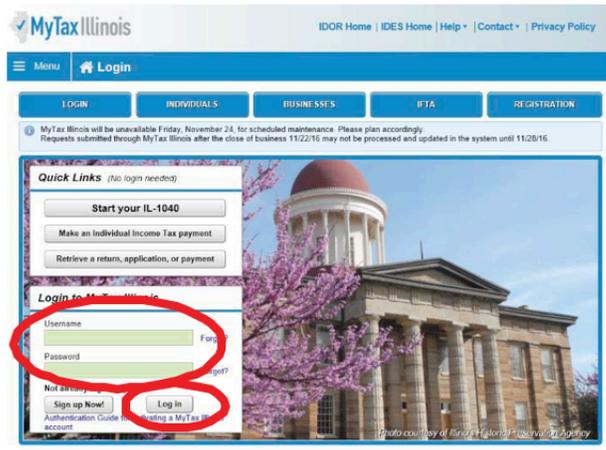
The screenshot shows the 'MyTaxIllinois' website. The top navigation bar includes 'IDOR Home | IDES Home | Help | Contact | Privacy Policy'. The main content area has a 'Request' page with a 'Submit' button circled in red. Below the button is a yellow box with the text: 'Please fill out all required fields below. When you are finished, click the Submit button on the top of the page to continue with activation.' Below this is a 'NEW ACTIVATION' section with an 'Activation Summary' and a note: 'Select the taxpayer ID type you want to use to activate your MyTax Illinois account:'.

10. Click 'OK' on the next screen. You will receive email confirmation that your account was activated.

RESERVE YOUR CREDIT

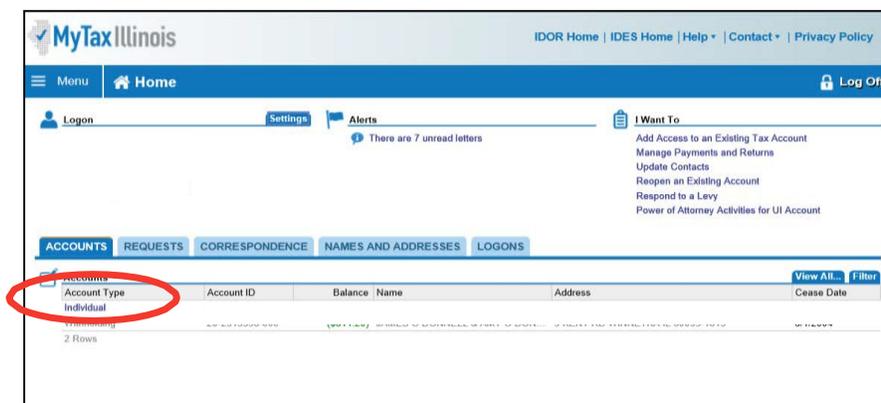
Only donors who have activated an account with the Illinois Department of Revenue will be able to reserve a Tax Credit. If you have a Username from a previous year, log in using that Username and Password. If you cannot access your account, contact IDOR at 800-732-8866 to resolve this issue. If this 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. Visit mytax.illinois.gov and log in.



12. Once logged in, you will be taken to your home screen.

- Click on the blue “Individual” hyperlink on the left side in the middle of the page under the “Accounts” tab. If you are applying as a business, you will choose your business account instead of individual.



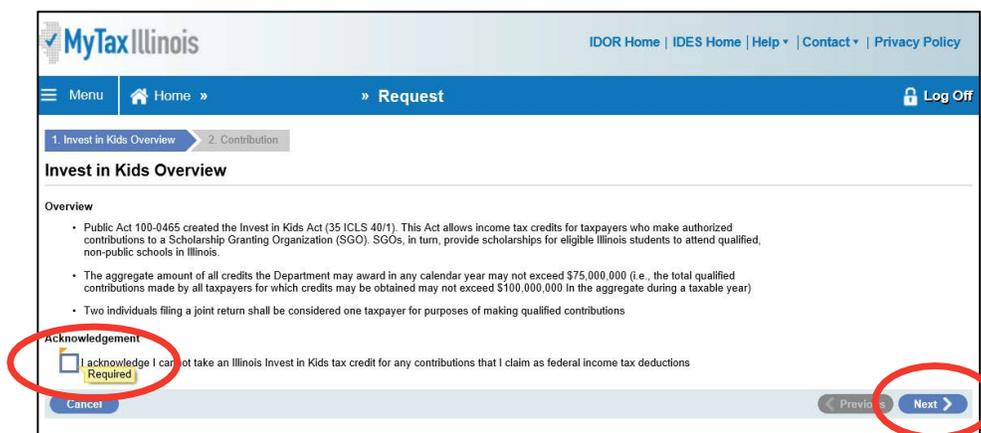
13. Under the "I Want To" section in the top right corner, click on "Contribute to Invest in Kids."

- This will take you directly to the credit application.



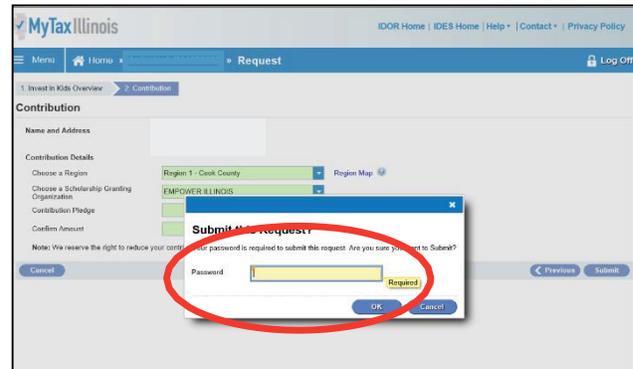
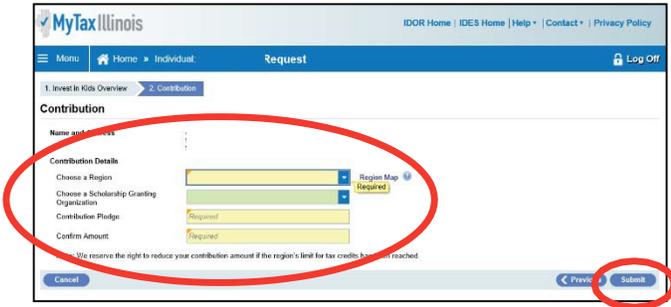
14. The first screen of the application is an overview of the program.

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

- Region and Scholarship Granting Organization of choice and the amount you plan to donate (contribution pledge).
- Please Note: this is the amount you plan to donate. You will then get a tax credit valued at 75 percent of that donation. Once filled out, click "Submit." You will then be prompted to re-enter your MyTax Illinois account password and click "OK." The final screen will be a confirmation that your application has been accepted.

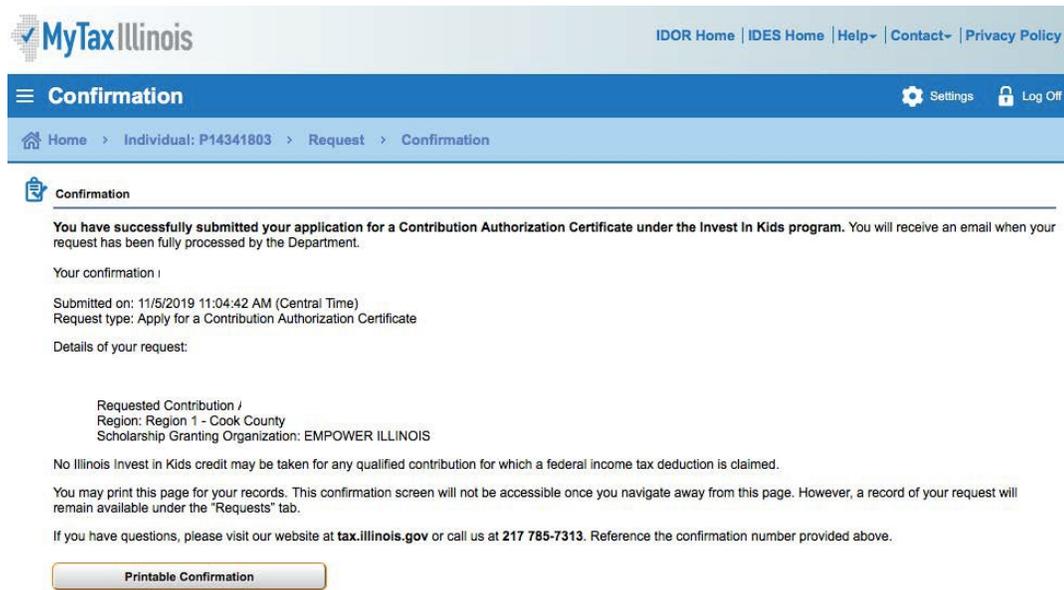


16. Access Your Contribution Letter.

- On your mytaxillinois home page, click on the "Correspondence" tab.
- Under "Unread Letters" you will see your "Invest in Kids Contribution Application." Click on the link to open your letter. (Picture 1)
- If you have a pop-up blocker turned on, you may receive an error message. (Picture 2) Make sure you allow pop-ups for the mytaxillinois website.



17. View or Print Confirmation for Reserving Your Tax Credits.

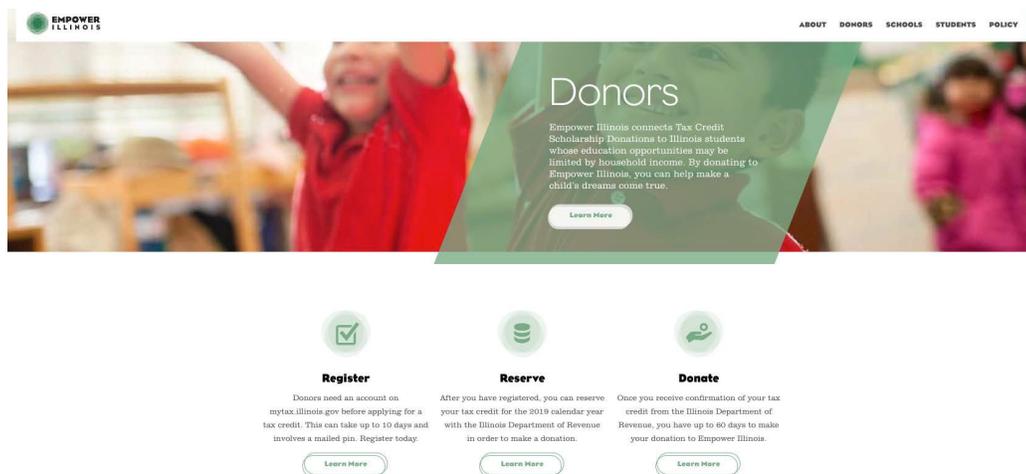


The screenshot shows the MyTax Illinois website interface. At the top, there is a navigation bar with the MyTax Illinois logo and links for IDOR Home, IDES Home, Help, Contact, and Privacy Policy. Below this is a blue header with the word "Confirmation" and icons for Settings and Log Off. A breadcrumb trail shows: Home > Individual: P14341803 > Request > Confirmation. The main content area is titled "Confirmation" and contains the following text: "You have successfully submitted your application for a Contribution Authorization Certificate under the Invest In Kids program. You will receive an email when your request has been fully processed by the Department." It then lists submission details: Submitted on: 11/5/2019 11:04:42 AM (Central Time), Request type: Apply for a Contribution Authorization Certificate, and Details of your request: Requested Contribution / Region: Region 1 - Cook County, Scholarship Granting Organization: EMPOWER ILLINOIS. A note states: "No Illinois Invest in Kids credit may be taken for any qualified contribution for which a federal income tax deduction is claimed." Another note says: "You may print this page for your records. This confirmation screen will not be accessible once you navigate away from this page. However, a record of your request will remain available under the 'Requests' tab." A final note reads: "If you have questions, please visit our website at tax.illinois.gov or call us at 217 785-7313. Reference the confirmation number provided above." At the bottom of the content area is a button labeled "Printable Confirmation".

MAKE YOUR DONATION

18. Visit EmpowerIllinois.org.

- On the donor page, click “donate” and follow the prompts to start your donation.



The screenshot shows the Empower Illinois website's "Donors" page. The header includes the Empower Illinois logo and navigation links for ABOUT, DONORS, SCHOOLS, STUDENTS, and POLICY. The main content area features a large image of a child in a red shirt with arms raised, and a green overlay with the text: "Donors Empower Illinois connects Tax Credit Scholarship Donations to Illinois students whose education opportunities may be limited by household income. By donating to Empower Illinois, you can help make a child's dreams come true." Below this is a "Learn More" button. The page is divided into three columns, each with an icon and a heading: "Register" (checkmark icon), "Reserve" (stack of coins icon), and "Donate" (hand holding coin icon). Each column contains a brief description of the step and a "Learn More" button. The "Register" section states: "Donors need an account on mytax.illinois.gov before applying for a tax credit. This can take up to 10 days and involves a mailed pin. Register today." The "Reserve" section states: "After you have registered, you can reserve your tax credit for the 2019 calendar year with the Illinois Department of Revenue in order to make a donation." The "Donate" section states: "Once you receive confirmation of your tax credit from the Illinois Department of Revenue, you have up to 60 days to make your donation to Empower Illinois."

For more information or questions, please call (309) 644-4524 or email donors@empowerillinois.org.

19. Once on the "Donate" page, review the donation check list to ensure you can complete your donation.

Are you ready to make your tax credit scholarship donation?

Use our Checklist to be sure.

- Have you reserved your tax credit at the My Tax Illinois website (mytax.illinois.gov)?
 - Do you have your Contribution Authorization Certificate from the Illinois Department of Revenue?
 - Have you selected Empower Illinois as the Scholarship Granting Organization (SGO) found on your Contribution Authorization Certificate?
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20. Once you are ready to make your tax credit scholarship donation, click "Start My Donation."



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Are you ready to make your tax credit scholarship donation?

Start My Donation

20. Start your donation.

- You will be redirected to Empower Illinois' donation wizard, which will walk you through the next steps.
- First, make sure you have your Contribution Authorization Certificate, and click "I Have My Certificate."

EMPOWER ILLINOIS

GET STARTED

Thank you for your interest in donating to the Tax Credit Scholarship program through Empower Illinois. You must have your Contribution Authorization Certificate from the Illinois Department of Revenue to continue. ?

I HAVE MY CERTIFICATE **GET CERTIFICATE**

If you need any assistance with this process, please contact us at 309-644-4524 or donors@empowerillinois.org.

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[Privacy](#) [Terms](#)

22. Enter the donor's email address.

EMPOWER ILLINOIS

DONOR INFORMATION

Donor Email Address

If you are filling this out on behalf of the donor, please use the donor's email address.

NEXT

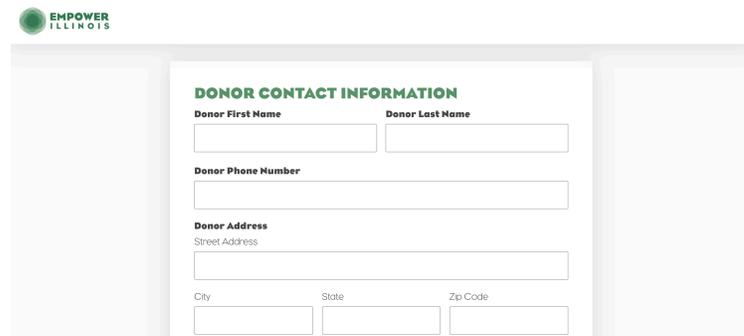
If you need any assistance with this process, please contact us at 309-644-4524 or donors@empowerillinois.org.

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[Privacy](#) [Terms](#)

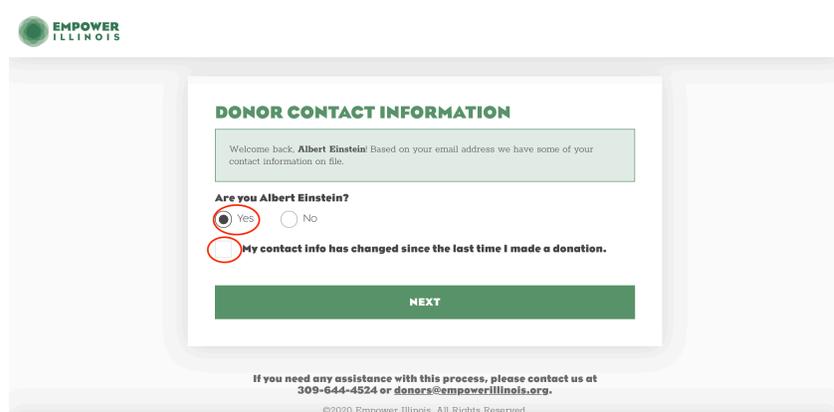
23. Confirm or enter contact information.

- If you are a new donor, or if we do not have a record of the email address you entered, you will be prompted to fill out a contact form.



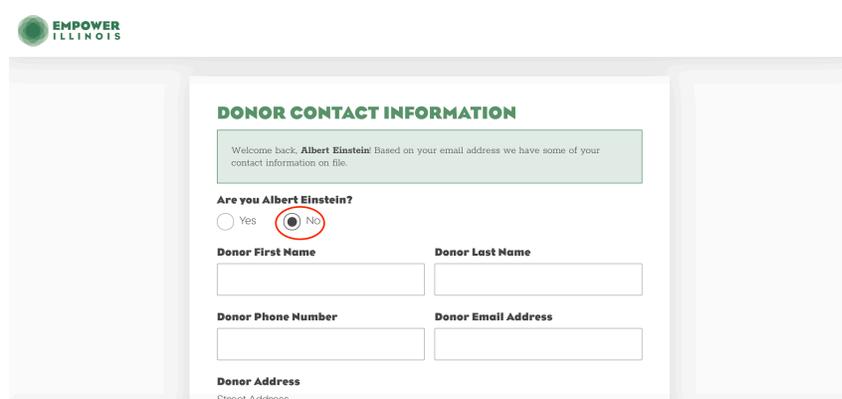
The screenshot shows the 'DONOR CONTACT INFORMATION' form. At the top left is the 'EMPOWER ILLINOIS' logo. The form title is 'DONOR CONTACT INFORMATION'. It contains several input fields: 'Donor First Name' and 'Donor Last Name' (two separate boxes), 'Donor Phone Number' (one box), 'Donor Address' (with a sub-label 'Street Address' and one box), and three boxes for 'City', 'State', and 'Zip Code'.

- If you are a returning donor, we may have your email address and some other contact information on file. Please confirm you are the donor associated with the email you entered by selecting “Yes.”
- If your contact information (phone number, address, etc.) has not changed since the last time you donated, leave the box unchecked and click “Next.”



The screenshot shows the 'DONOR CONTACT INFORMATION' form for a returning donor. At the top left is the 'EMPOWER ILLINOIS' logo. The form title is 'DONOR CONTACT INFORMATION'. Below the title is a message: 'Welcome back, Albert Einstein! Based on your email address we have some of your contact information on file.' Below this is the question 'Are you Albert Einstein?' with two radio buttons: 'Yes' (which is selected and circled in red) and 'No'. Below that is another question: 'My contact info has changed since the last time I made a donation.' with an unchecked radio button (circled in red). At the bottom is a green 'NEXT' button. At the very bottom, there is contact information: 'If you need any assistance with this process, please contact us at 309-644-4524 or donors@empowerillinois.org.' and a copyright notice: '©2020 Empower Illinois. All Rights Reserved.'

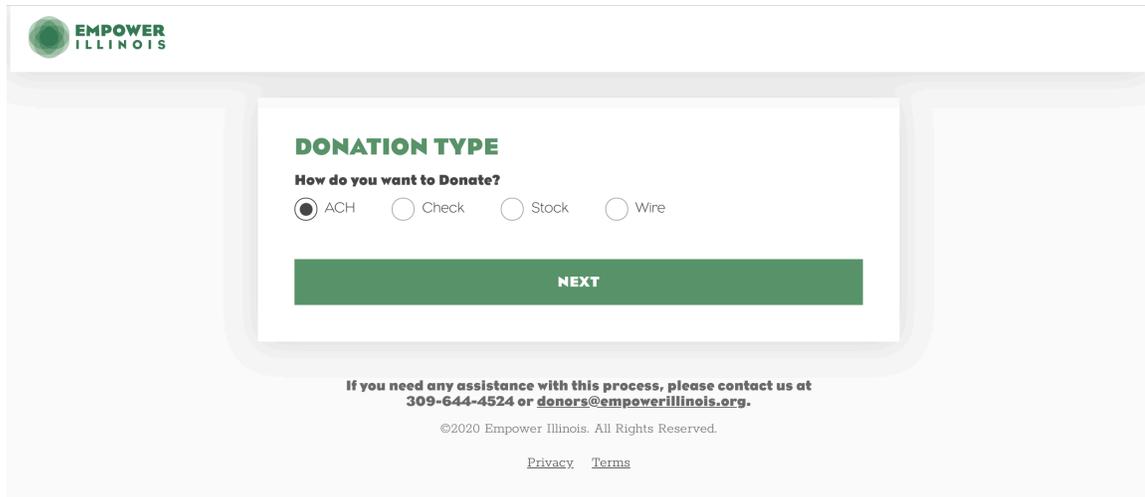
- If we have an incorrect donor on file associated with the email you entered, please select “No,” and fill out the contact form.



The screenshot shows the 'DONOR CONTACT INFORMATION' form for a returning donor with an incorrect record. At the top left is the 'EMPOWER ILLINOIS' logo. The form title is 'DONOR CONTACT INFORMATION'. Below the title is a message: 'Welcome back, Albert Einstein! Based on your email address we have some of your contact information on file.' Below this is the question 'Are you Albert Einstein?' with two radio buttons: 'Yes' and 'No' (which is selected and circled in red). Below that are four input fields: 'Donor First Name' and 'Donor Last Name' (two separate boxes), 'Donor Phone Number' and 'Donor Email Address' (two separate boxes). At the bottom is the 'Donor Address' section with a sub-label 'Street Address' and one box.

24. Select your donation type.

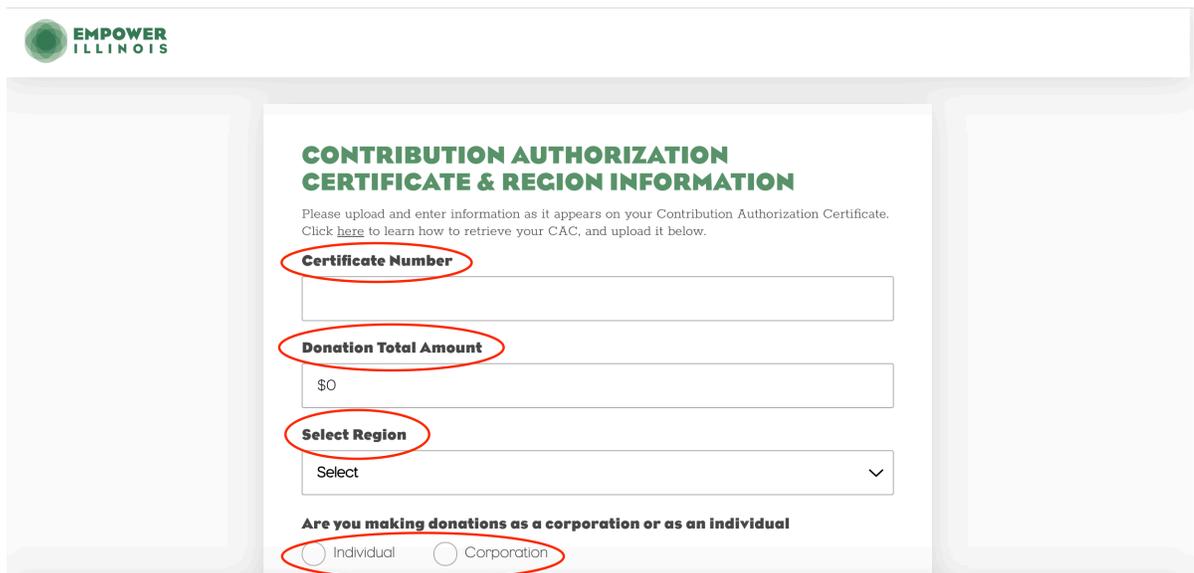
- Please indicate whether you would like to donate by ACH, Check, Stock, or Wire, and click “Next.”



The screenshot shows the 'DONATION TYPE' form on the Empower Illinois website. The form is titled 'DONATION TYPE' and asks 'How do you want to Donate?'. There are four radio button options: ACH (selected), Check, Stock, and Wire. Below the options is a green 'NEXT' button. At the bottom of the form, there is contact information: 'If you need any assistance with this process, please contact us at 309-644-4524 or donors@empowerillinois.org.' and a copyright notice: '©2020 Empower Illinois. All Rights Reserved.' with links for 'Privacy' and 'Terms'.

25. Enter the information found on your Contribution Authorization Certificate (CAC).

- Fill in the certificate number, donation amount, and region found on your CAC.
- Indicate your donation type (individual or corporation).



The screenshot shows the 'CONTRIBUTION AUTHORIZATION CERTIFICATE & REGION INFORMATION' form on the Empower Illinois website. The form asks the user to 'Please upload and enter information as it appears on your Contribution Authorization Certificate. Click here to learn how to retrieve your CAC, and upload it below.' There are four main input fields, each circled in red: 'Certificate Number' (text input), 'Donation Total Amount' (text input with '\$0' pre-filled), 'Select Region' (dropdown menu with 'Select' and a downward arrow), and 'Are you making donations as a corporation or as an individual' (radio buttons for 'Individual' and 'Corporation').

26. Upload your CAC.

- Upload both pages of your CAC. As a reminder, this is the electronic PDF file you received from the Illinois Department of Revenue.

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CONTRIBUTION AUTHORIZATION CERTIFICATE & REGION INFORMATION

Please upload and enter information as it appears on your Contribution Authorization Certificate. Click [here](#) to learn how to retrieve your CAC, and upload it below.

Certificate Number

Donation Total Amount

Select Region

Are you making donations as a corporation or as an individual

Individual Corporation

Please upload both pages of your Illinois Department of Revenue Contribution Authorization Certificate

SELECT FILE

- If you need help finding your CAC on mytaxillinois.gov and uploading it to the donor wizard, view our [step-by-step guide](#).

EMPOWER ILLINOIS

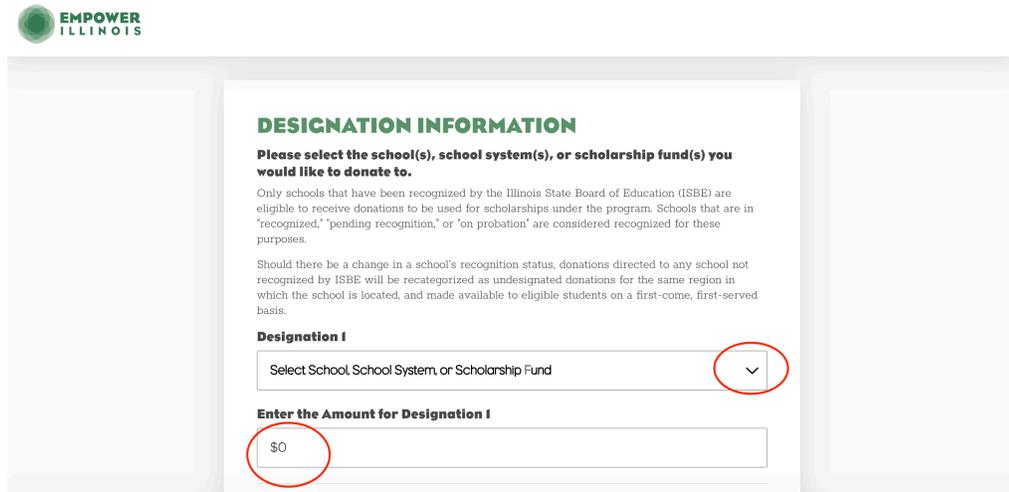
CONTRIBUTION AUTHORIZATION CERTIFICATE & REGION INFORMATION

Please upload and enter information as it appears on your Contribution Authorization Certificate. Click [here](#) to learn how to retrieve your CAC, and upload it below.

Certificate Number

27. Select school designation and donation amount.

- You can designate to a school or school system at any dollar amount, as long it does not exceed the amount listed on your CAC.
- If your gift is greater than \$1,000, you can designate to multiple schools.
- Click the “+” next to “Select another school, school system, or scholarship fund” in the middle of the page to designate to more than one school.



EMPOWER ILLINOIS

DESIGNATION INFORMATION

Please select the school(s), school system(s), or scholarship fund(s) you would like to donate to.

Only schools that have been recognized by the Illinois State Board of Education (ISBE) are eligible to receive donations to be used for scholarships under the program. Schools that are in "recognized," "pending recognition," or "on probation" are considered recognized for these purposes.

Should there be a change in a school's recognition status, donations directed to any school not recognized by ISBE will be recategorized as undesignated donations for the same region in which the school is located, and made available to eligible students on a first-come, first-served basis.

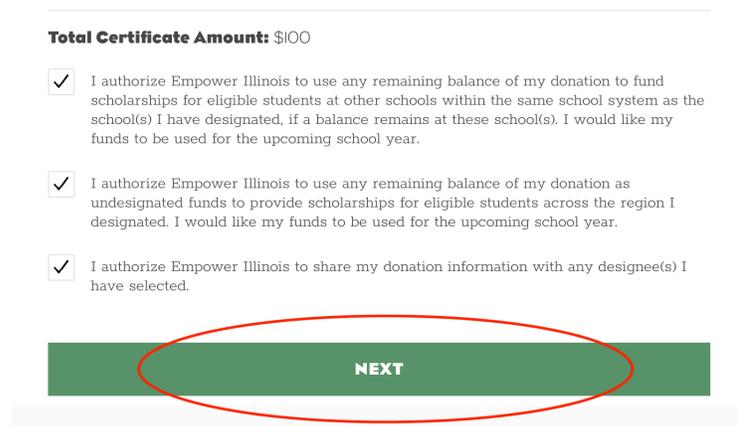
Designation I

Select School, School System, or Scholarship Fund

Enter the Amount for Designation I

\$0

28. Review donor authorizations.



Total Certificate Amount: \$100

- I authorize Empower Illinois to use any remaining balance of my donation to fund scholarships for eligible students at other schools within the same school system as the school(s) I have designated, if a balance remains at these school(s). I would like my funds to be used for the upcoming school year.
- I authorize Empower Illinois to use any remaining balance of my donation as undesignated funds to provide scholarships for eligible students across the region I designated. I would like my funds to be used for the upcoming school year.
- I authorize Empower Illinois to share my donation information with any designee(s) I have selected.

NEXT

Please select your donation type below to view the last few steps of the donation process:

ACH

CHECK

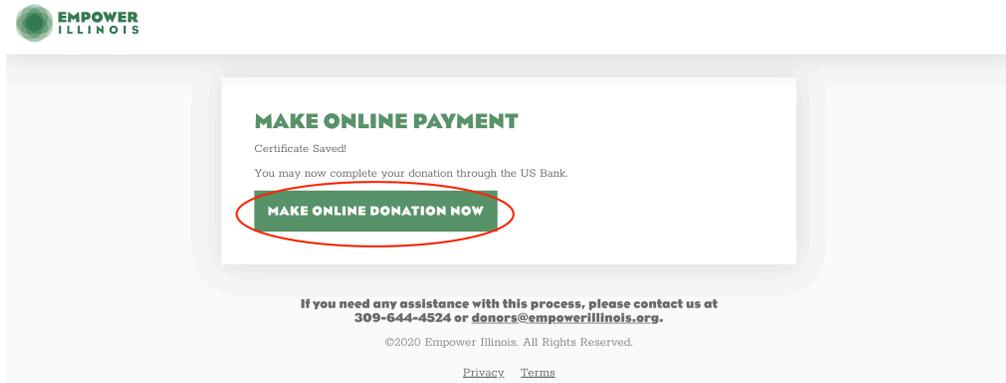
STOCKS AND BONDS

WIRE

DONATE BY ACH

29. Make online donation.

- Once your CAC and designation forms have been saved, you can complete your donation through ACH bank transfer.



30. Complete payment and contact information, if not pre-populated.

29. Click "Continue."



30. Success! You have completed your Empower Illinois tax credit scholarship donation.

DONATE BY CHECK

29. Mail your check to Empower Illinois.

- Because you have uploaded your CAC and designation form into the donor wizard, you will need to mail your check to Empower Illinois (PO Box 809001, Chicago, IL 60680-9001). Please include your CAC number on the back of your check.
- You do not need to print out this page and send it in with your check.
- Your donation has also been assigned a confirmation number. This number is for your reference and assures that we have received your CAC and designation form. This number does not confirm we have received your donation.



DONATION NEXT STEPS - CHECK

Thank you for beginning your donation to the Tax Credit Scholarship Program through Empower Illinois. Your confirmation number is **DyBUxBLlKA**.

We have received your Certificate of Authorization (CAC) and Invest in Kids Tax Credit Scholarship Donation Form. In order to complete the donation, you must send in your check. **Please make sure the amount on your check matches the donation amount you provided to us during this process, and mail it to:**

Empower Illinois
PO Box 809001
Chicago, IL 60680-9001

Overnight Packages should be sent to:
US Bank
Attn: Lockbox 809001
5635 South Archer Avenue
Chicago, IL 60638

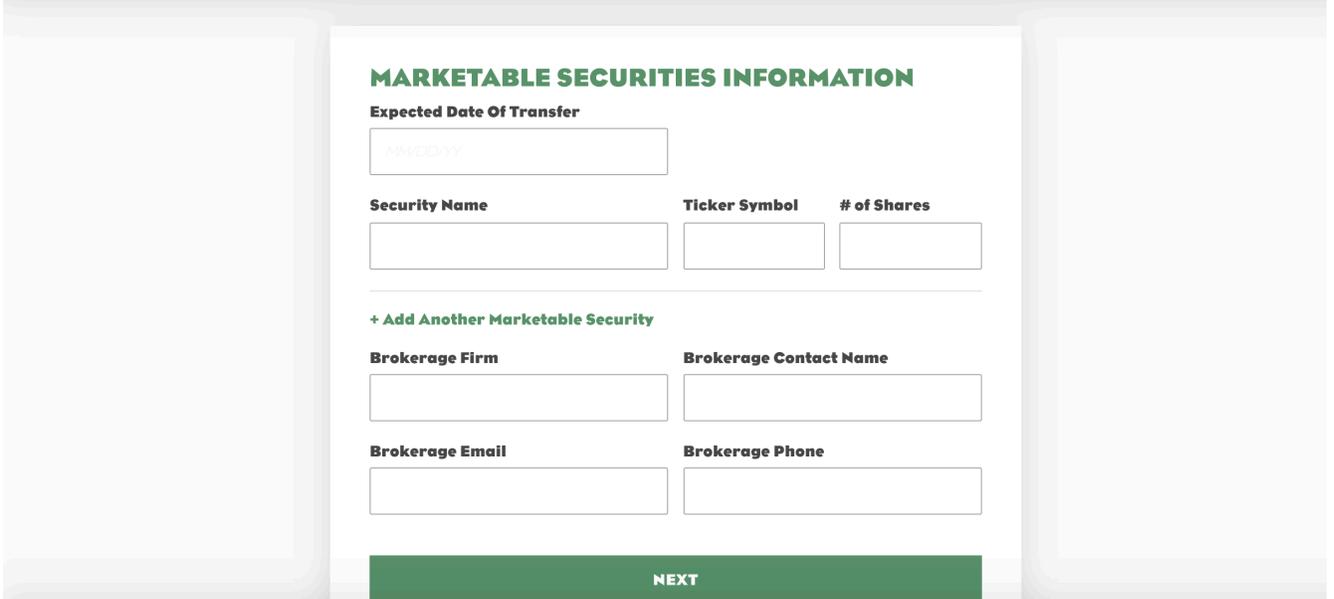
As a reminder, you must send in your check in order for us to finish processing your donation. We cannot issue you a Certificate of Receipt until the funds are received. You will receive a thank you letter from Empower Illinois when your donation is complete.

PRINT

30. Success! You have completed your Empower Illinois tax credit scholarship donation.

DONATE USING STOCKS AND BONDS

29. Complete your banking information.



The screenshot shows a web form titled "MARKETABLE SECURITIES INFORMATION" with the following fields:

- Expected Date Of Transfer:** A text input field containing "MM/DD/YY".
- Security Name:** A text input field.
- Ticker Symbol:** A text input field.
- # of Shares:** A text input field.
- + Add Another Marketable Security:** A green link.
- Brokerage Firm:** A text input field.
- Brokerage Contact Name:** A text input field.
- Brokerage Email:** A text input field.
- Brokerage Phone:** A text input field.
- NEXT:** A green button at the bottom of the form.

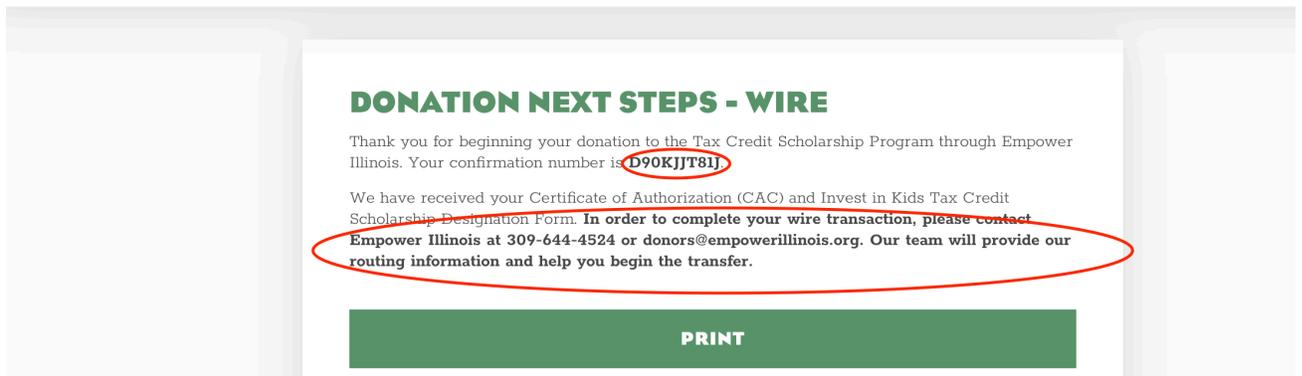
30. Notify U.S. Bank of share transfer initiation.

- We ask that you or your broker immediately notify [Lynda Arndt](#) of U.S. Bank Trust upon transfer initiation of any shares (ACATS or otherwise). Please include your name (as the donor) and the shares you are transferring in the comments section of the delivery notice. This will help expedite the donation process.
- Please note that your donation has been assigned a confirmation number. This number is for your reference and assures that we have received your CAC and designation form. This number does not confirm we have received your donation.

DONATE USING WIRE TRANSFER

29. Contact Empower Illinois and begin transfer.

- In order to complete your wire transaction, please contact Empower Illinois at 309-644-4524 or donors@empowerillinois.org. Our team will provide the routing information to begin the transfer.
- Your donation has been assigned a confirmation number. This number is for your reference and assures that we have received your CAC and designation form. This number does not confirm we have received your donation.



30. Success! You have completed your Empower Illinois tax credit scholarship donation.
