



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:

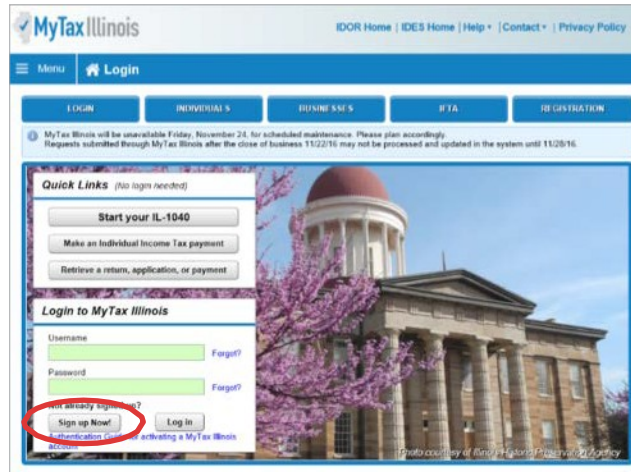
- IL-PIN
- Most Recent Adjusted Gross Income IL
- Driver's License Number
- IL State Identification Number

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 has a blue header with the text 'NEW ACTIVATION'. Below the header, there is a section titled 'Activation Summary' with the instruction 'Select the taxpayer ID type you want to use to activate your MyTax Illinois account:'. There are three radio button options: 'SSN' (which is circled in red), 'Sales Account Id', and 'License Number'. Below these options, there are input fields for 'SSN' (containing '***-**-3345') and 'License Number'. There is also a 'Service Bureau ID' field. Below the radio buttons, there is a question 'Are you trying to activate your MyTax Illinois account for Individual Income Tax?' with 'Yes' and 'No' radio button options. Below this, there is a text block asking for the 'Letter ID' and providing instructions. Below the text block, there are two input fields: 'Individual IL PIN Look up my IL PIN' (containing '17244502') and 'Prior Year Adjusted Gross Income' (containing '\$ 00'). The 'Prior Year Adjusted Gross Income' field is circled in red. At the bottom of the page, there is a 'Web Contact Information' section with fields for 'Your Name' (containing 'Charles'), 'Contact Phone' (containing '(830) 740-2150'), '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 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.
-

This screenshot shows the same 'Request' window, but the 'IL-PIN' field is circled in red, and the 'Back' button is visible below it. The 'Conduct Inquiry' button is no longer visible.

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:

Web Contact Information:

- Your Name: [Charles]
- Contact Phone: [830/740-2150]
- Email: [charles.pays@gmail.com]
- Alternate Phone: [Redacted]

Web Logon Information:

- Pick a username, you'll use this to login to MyTax Illinois: [cpays] ✓
- Password Rules:
 - Minimum 8 characters, no more than 20
 - Passwords must contain both letters and numbers
 - Passwords must be mixed case
- Pick your password: [Redacted] ✓
- In case you forget your password:
 - in what city does your nearest sibling live? [Chicago]

Confirm Important Information:

- Confirm Email: [charles.pays@gmail.com]
- Confirm Password: [Redacted]

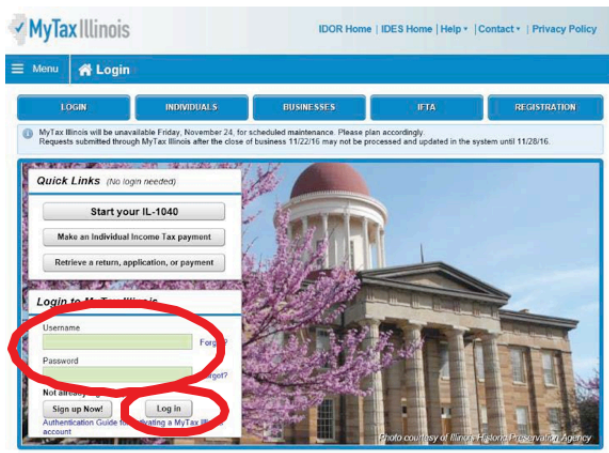
The screenshot shows the 'MyTaxIllinois' 'Request' page. The 'Submit' button is circled in red. Below it is a 'NEW ACTIVATION' section with an 'Activation Summary' and a note: 'Select the taxpayer ID type you want to use to activate your MyTax Illinois account:'.

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

RESERVE YOUR CREDIT

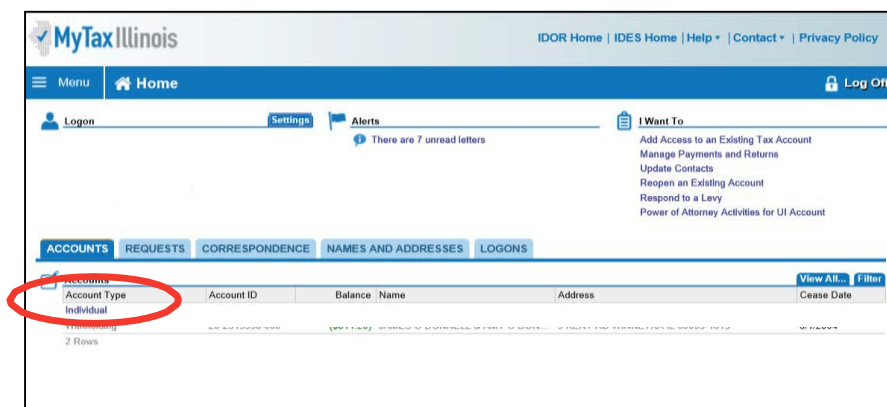
Only donors who have activated an account with the Illinois Department of Revenue will be able to reserve a Tax Credit. If you have a Username from a previous year, log in using that Username and Password. If you cannot access your account, contact IDOR at 800-732-8866 to resolve this issue. If this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



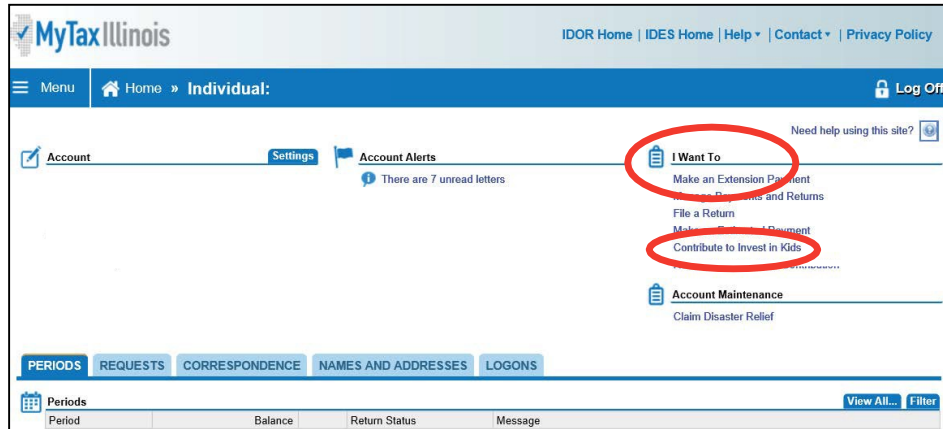
12. Once logged in, you will be taken to your home screen.

- 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.



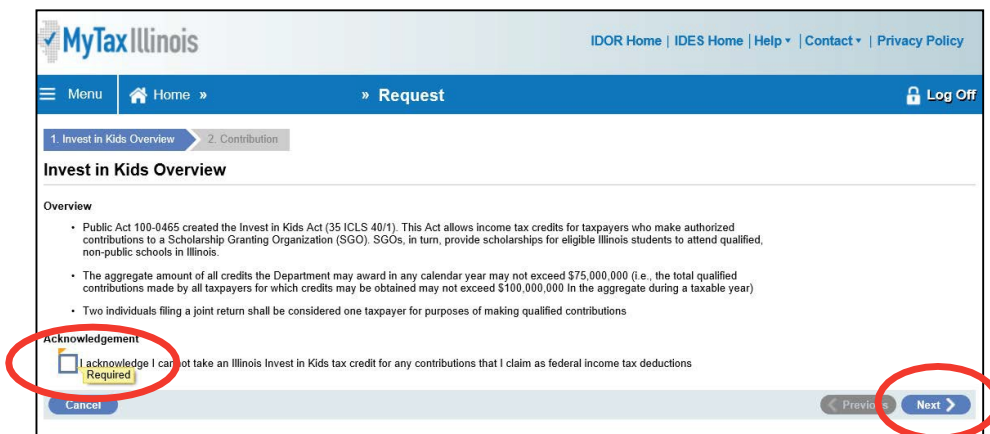
13. Under the "I Want To" section in the top right corner, click on "Contribute to Invest in Kids."

- This will take you directly to the credit application.



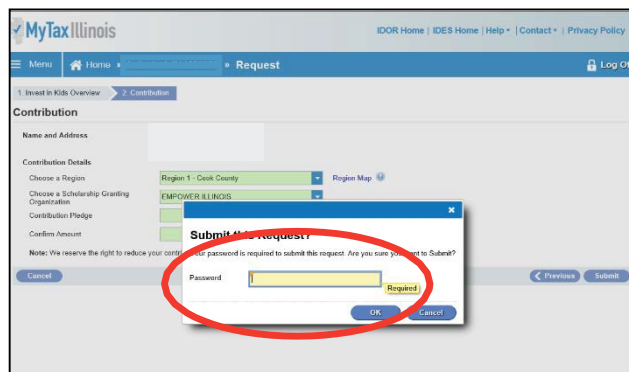
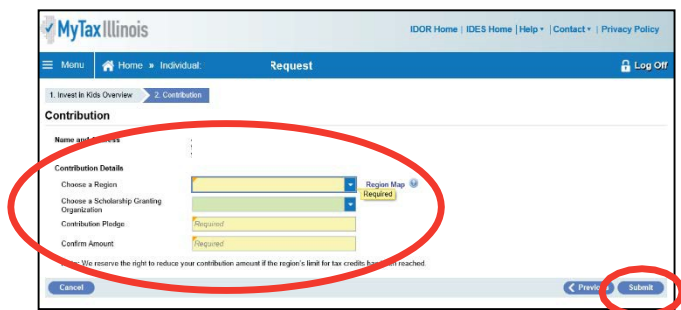
14. The first screen of the application is an overview of the program.

- 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.



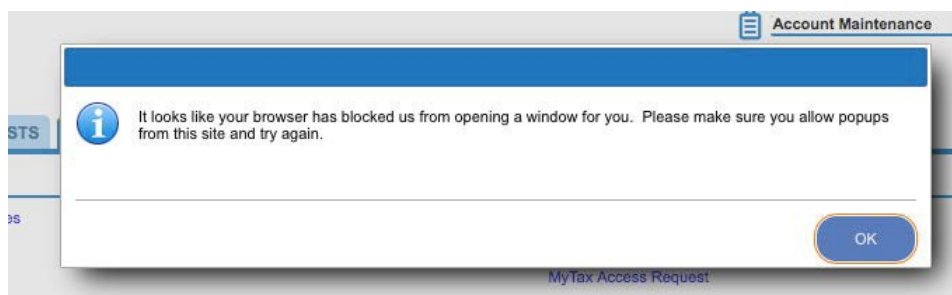
15. Fill out the requested information on the "Contribution" screen.

- Region and Scholarship Granting Organization of choice and the amount you plan to donate (contribution pledge).
- Please Note: this is the **TOTAL** amount you plan to donate in that region. 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.

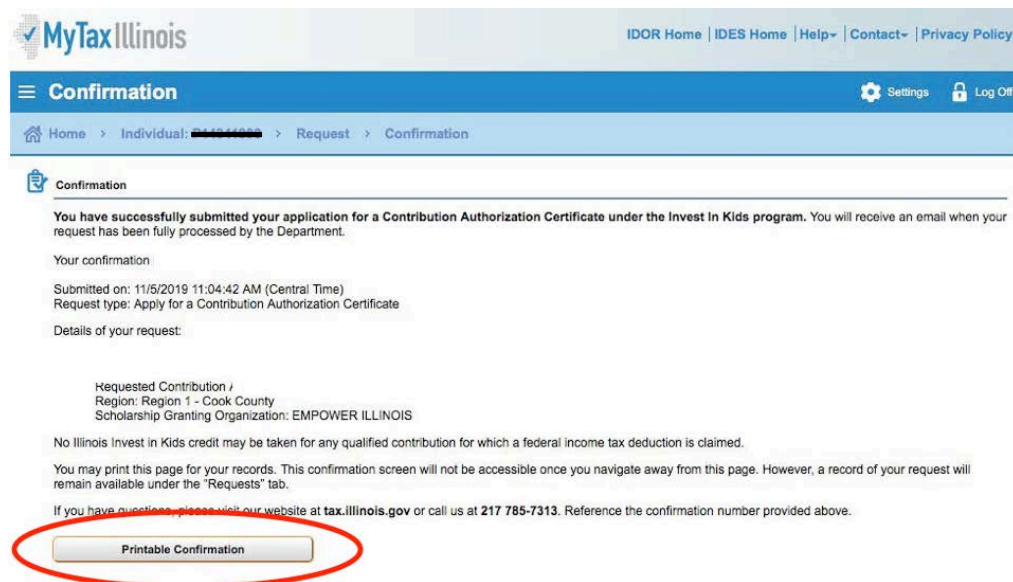


16. Access Your Contribution Letter.

- On your mytaxillinois home page, click on the "Correspondence" tab.
- Under "Unread Letters" you will see your "Invest in Kids Contribution Application." **This is your CAC.** Click on the link to open the PDF. (Picture 1)
- Please **download and save** the PDF, as you will need it for Step 24.
- 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.



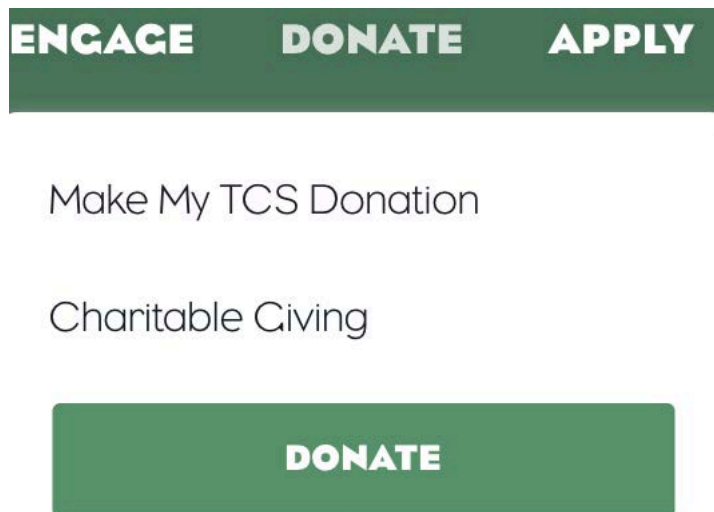
17. View or Print Confirmation for Reserving Your Tax Credits.



MAKE YOUR DONATION

18. Visit EmpowerIllinois.org.

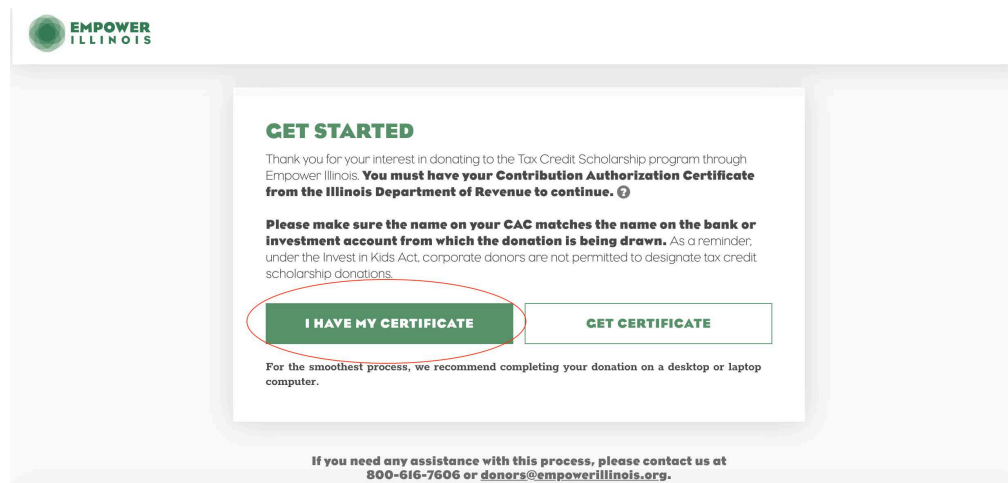
- On the Donate dropdown menu, click the "Donate" button.



For more information or questions, please call 800-616-7606 or email donors@empowerillinois.org.

19. 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 (see this [example](#)), 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.**

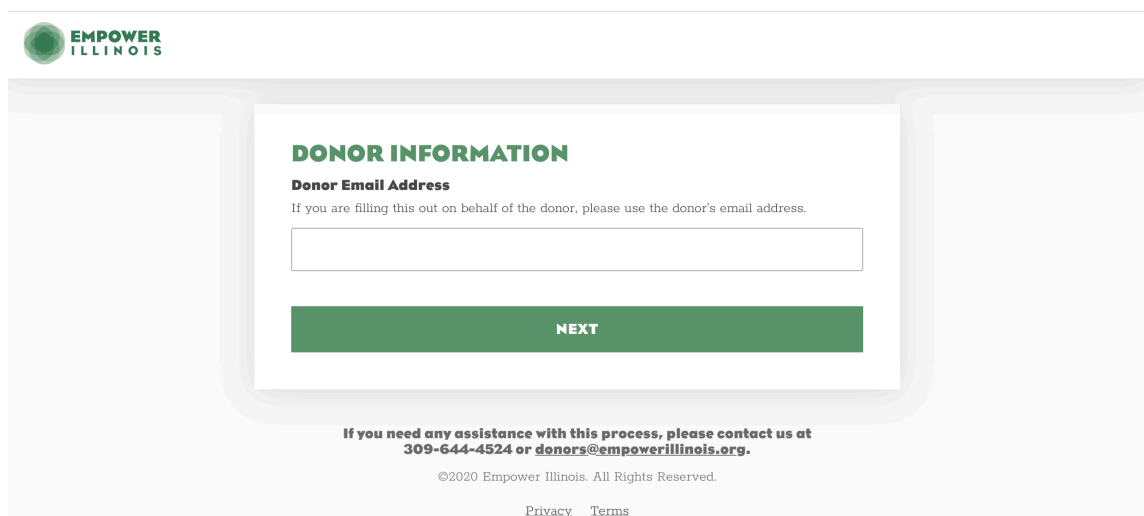
Please make sure the name on your CAC matches the name on the bank or investment account from which the donation is being drawn. As a reminder, under the Invest in Kids Act, corporate donors are not permitted to designate tax credit scholarship donations.

I HAVE MY CERTIFICATE **GET CERTIFICATE**

For the smoothest process, we recommend completing your donation on a desktop or laptop computer.

If you need any assistance with this process, please contact us at 800-616-7606 or donors@empowerillinois.org.

20. 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

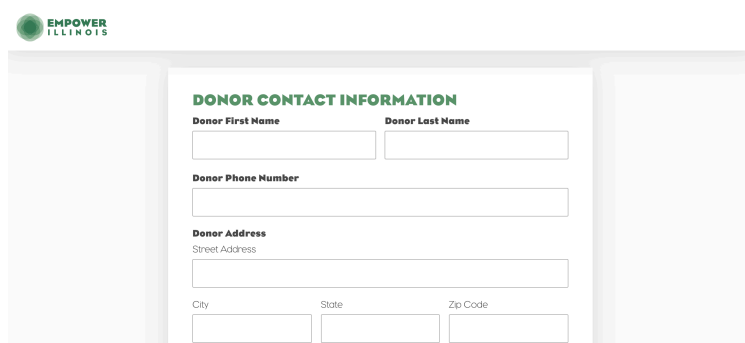
If you need any assistance with this process, please contact us at 309-644-4524 or donors@empowerillinois.org.

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

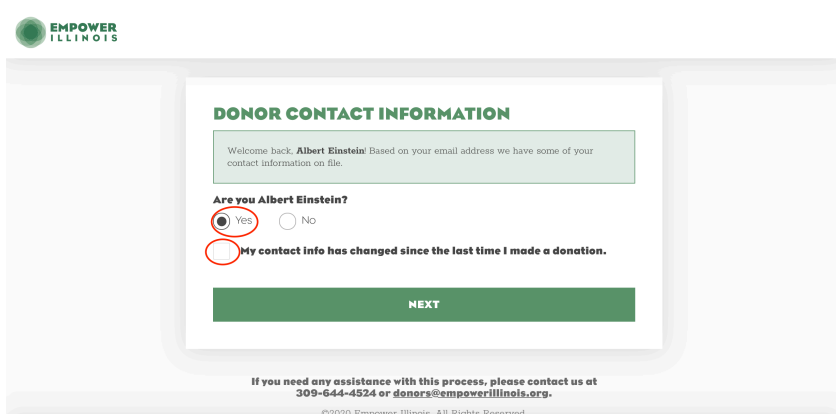
21. Confirm or enter contact information.

- 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.



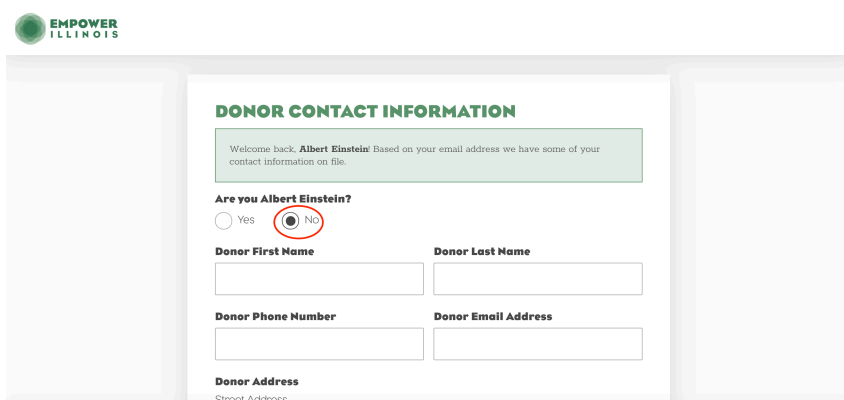
The screenshot shows the 'DONOR CONTACT INFORMATION' form. At the top left is the 'EMPOWER ILLINOIS' logo. The form title 'DONOR CONTACT INFORMATION' is in green. Below it are two input fields: 'Donor First Name' and 'Donor Last Name'. Then is a 'Donor Phone Number' field. Next is the 'Donor Address' section, which includes a 'Street Address' field, and three smaller fields 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 returning donors. It includes the 'EMPOWER ILLINOIS' logo and the title. A message box says: '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 the radio buttons is a link: 'My contact info has changed since the last time I made a donation.' At the bottom is a green 'NEXT' button. Footer text includes: 'If you need any assistance with this process, please contact us at 309-644-4524 or donors@empowerillinois.org.' and '©2020 Empower Illinois. All Rights Reserved.'

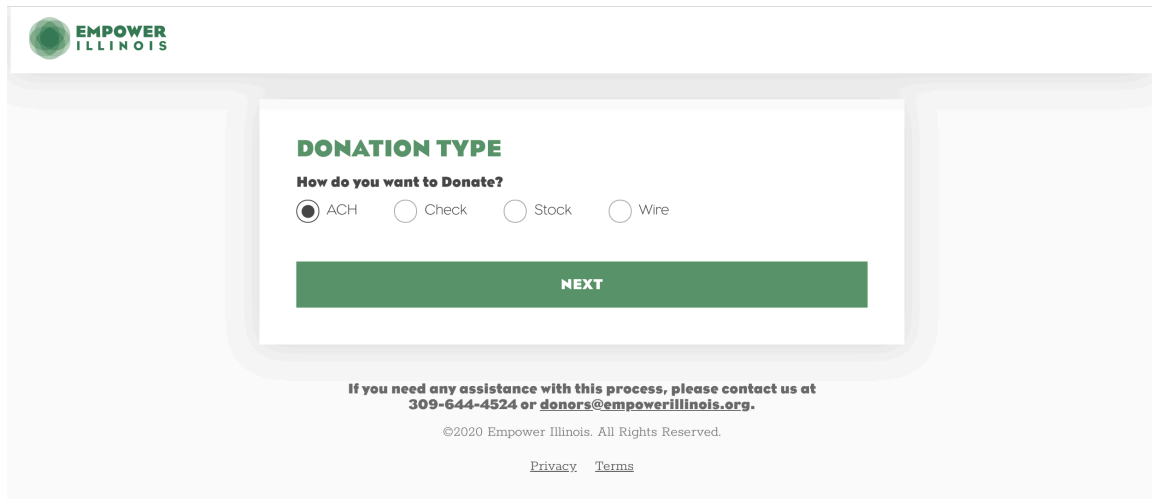
- If we have an incorrect donor on file associated with the email you entered, please select “No,” and fill out the contact form.



The screenshot shows the 'DONOR CONTACT INFORMATION' form for returning donors who selected 'No'. It includes the 'EMPOWER ILLINOIS' logo and the title. A message box says: '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 the radio buttons are four input fields: 'Donor First Name', 'Donor Last Name', 'Donor Phone Number', and 'Donor Email Address'. At the bottom is the 'Donor Address' section with a 'Street Address' field.

22. Select your donation type.

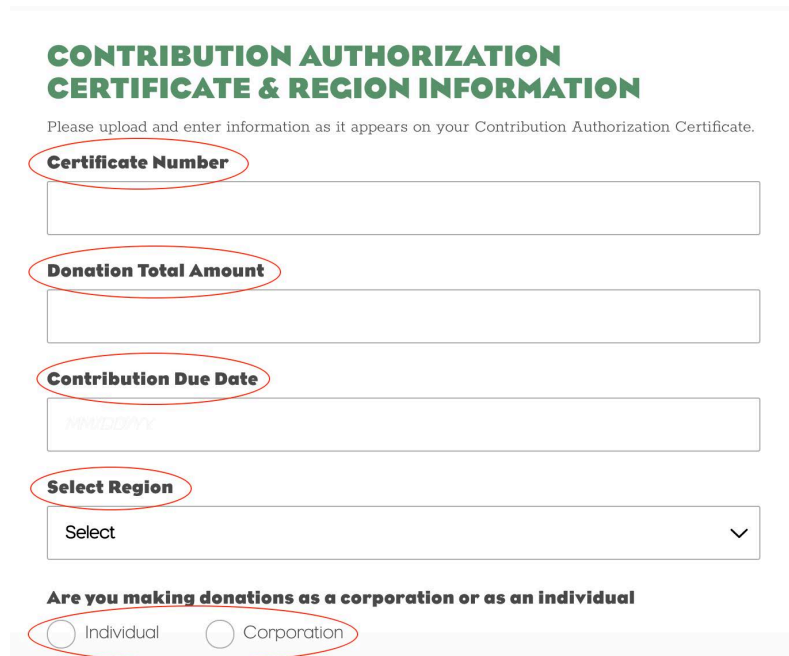
- Please indicate whether you would like to donate by ACH, Check, Stock, or Wire, and click “Next.”



The screenshot shows the Empower Illinois logo in the top left corner. The main heading is "DONATION TYPE" in green. Below it, the question "How do you want to Donate?" is followed by four radio button options: ACH (selected), Check, Stock, and Wire. A large green "NEXT" button is centered below the options. At the 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." with links for "Privacy" and "Terms".

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

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



The form is titled "CONTRIBUTION AUTHORIZATION CERTIFICATE & REGION INFORMATION" in green. Below the title, it says "Please upload and enter information as it appears on your Contribution Authorization Certificate." The form contains five input fields, each with a label circled in red: "Certificate Number", "Donation Total Amount", "Contribution Due Date", "Select Region" (a dropdown menu), and "Are you making donations as a corporation or as an individual" (with radio buttons for "Individual" and "Corporation", both also circled in red).

24. 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.
- Once you see the option to "Preview Your CAC," you have successfully uploaded your document.

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

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

Select Region

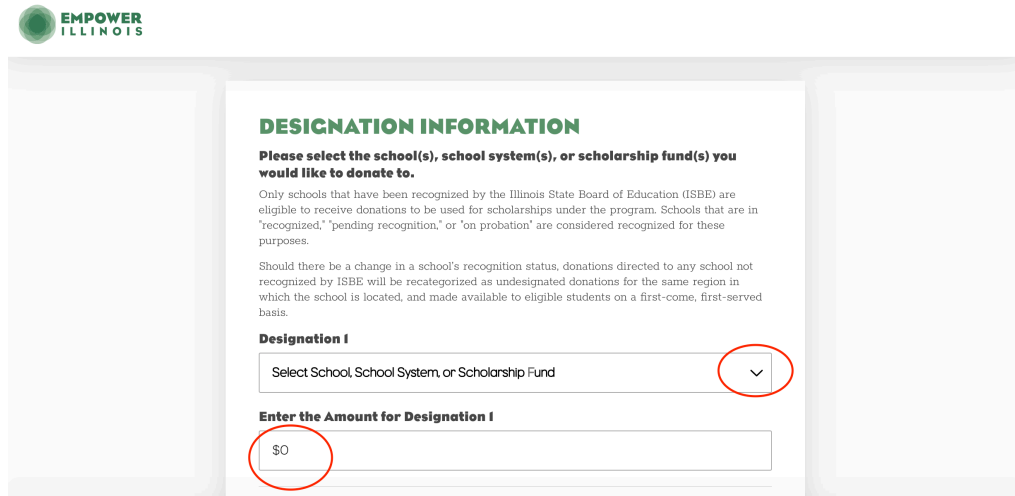
▼

Are you making donations as a corporation or as an individual

☐ Individual ☐ Corporation

25. 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.



26. Review donor authorizations.

Total Certificate Amount: \$100

- ☒ I authorize Empower Illinois to share my donation information with any designee(s) I have selected.
- ☒ I agree to the Empower Illinois Terms & Conditions and Privacy Policy. In particular, in the event that the amount of donations exceeds the number of scholarships needed by the particular school, school system or region, pursuant to Section 1000.200(b)(5) of the Illinois Invest in Kids Act, I permit and authorize Empower Illinois to, among other things, use the contribution to award scholarships to eligible students to attend any recognized school in the same region or any recognized school in another region. In such an event, Empower Illinois will take into account then-current regulations and other guidance promulgated by the State of Illinois and any additional guidance provided by me as the donor in accordance with my contribution, including any particular school or region I selected at the time of the contribution.*
- ☒ Although it is Empower Illinois' goal to use my contribution at the particular school, school system or region that I have designated, in the event that the amount of donations exceeds the number of scholarships needed by the particular school, school system or region, I authorize Empower Illinois to use any remaining balance of my donation to fund scholarships for eligible students at other recognized schools within the same school system as the school(s) I have designated, if a balance remains at these school(s). Also, I would like my funds to be used for the upcoming school year.

NEXT

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

ACH

CHECK

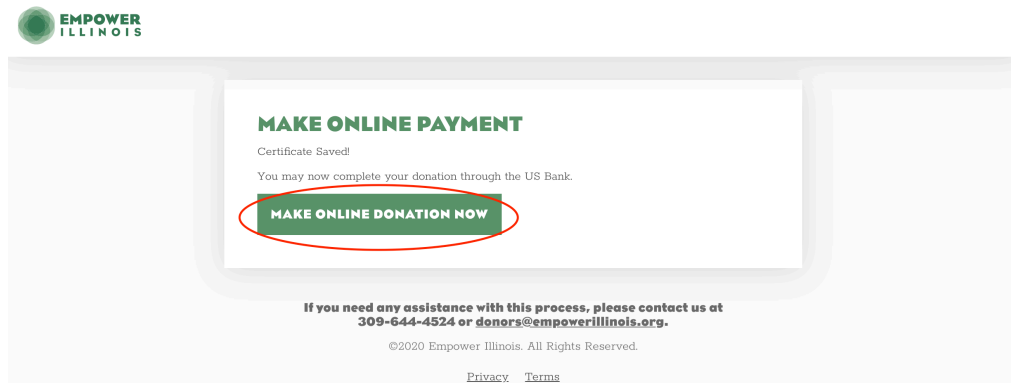
STOCKS AND BONDS

WIRE

DONATE BY ACH

27. Make online donation.

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



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

EMPOWER ILLINOIS

Make a Payment

[Exit](#)

My Payment

Empower Illinois Contributions

Region Region 1

Certificate Number 1234

Designation 1 Altus Academy - Chicago

Designation Amount 1 \$100

Payment Information

Frequency One Time

Payment Amount

Payment Date Now

Contact Information

First Name

Last Name

Company (Optional)

Address 1

Address 2 (Optional)

City

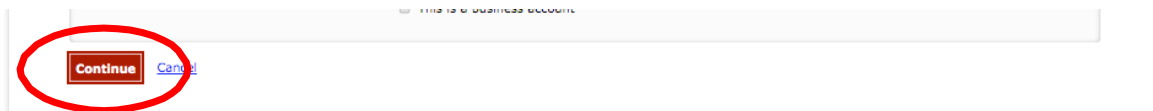
State

Zip Code (Optional)

Phone Number

Email Address

29. Click "Continue."



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

DONATE BY CHECK

27. 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 (made out to Empower Illinois) to 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


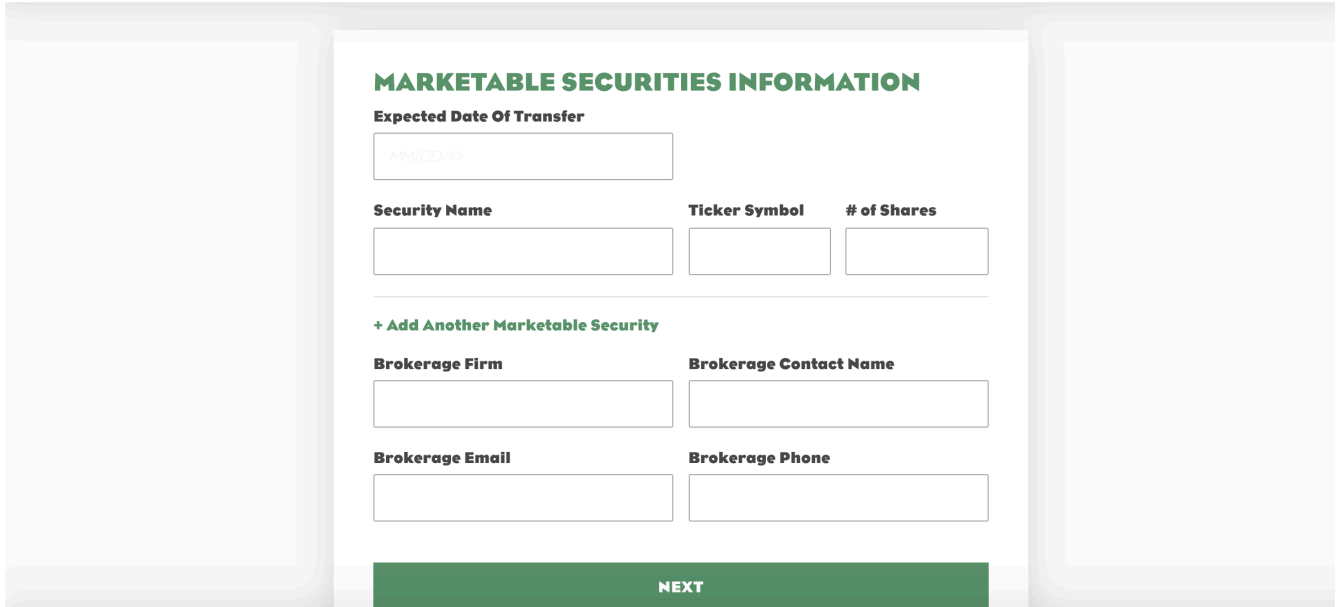
As a reminder, you must send in your check in order for us to finish processing your donation. We cannot issue you a Certificate of Receipt until the funds are received. You will receive a thank you letter from Empower Illinois when your donation is complete.

PRINT

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

DONATE USING STOCKS AND BONDS

27. Complete your banking information.

The form is titled "MARKETABLE SECURITIES INFORMATION" in green. It contains the following fields:

- Expected Date Of Transfer:** A text box with a placeholder "MM/DD/YY".
- Security Name:** A text box.
- Ticker Symbol:** A text box.
- # of Shares:** A text box.
- + Add Another Marketable Security:** A green link.
- Brokerage Firm:** A text box.
- Brokerage Contact Name:** A text box.
- Brokerage Email:** A text box.
- Brokerage Phone:** A text box.
- NEXT:** A green button.

28. 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.

DONATION NEXT STEPS - MARKETABLE SECURITIES

Thank you for beginning your donation to the Tax Credit Scholarship Program through Empower Illinois. Your confirmation number is **Du3v7pLzi2**. We have received your Certificate of Authorization (CAC) and Invest in Kids Tax Credit Scholarship Designation Form.

Please use the following instructions to make your marketable securities donation payment to Empower Illinois:

Account Name: Empower Illinois

Account Number: 001051000080

To deposit any DTC-eligible security into a U.S. Bank Trust account:

Including not limited to Equities, Corporate and Municipal Bonds, Commercial Paper, Medium-Term Instruct current custodian to deliver to:

The Depository Trust Company

Participant Account 2803

For credit to account name and number referenced above

Ask your broker or bank to include your name (as the donor) in the comments section of the delivery notice. U.S. Bank is ACAT eligible, with participant number 2803. Please submit through ACATS when possible and **notify Lynda.arndt@usbank.com immediately upon initiation of the request.**

To deposit any Fed-eligible security:

Including all Fed-eligible Bonds, Bills, Notes, and agencies, including GNMA's Instruct current custodian to deliver to: Federal Reserve Bank of Cleveland

For: U.S. Bank, N.A., Trust

ABA 042-000-013

1050/TRUST

For Account Number: 001051000080

Ask your broker or bank to include your name (as the donor) in the comments section of the delivery notice.

If you need any assistance with this process or have questions about making a donation payment, please call **800-616-7606** or email donors@empowerillinois.org. A member of our staff will reach out to confirm when the stock has settled.

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

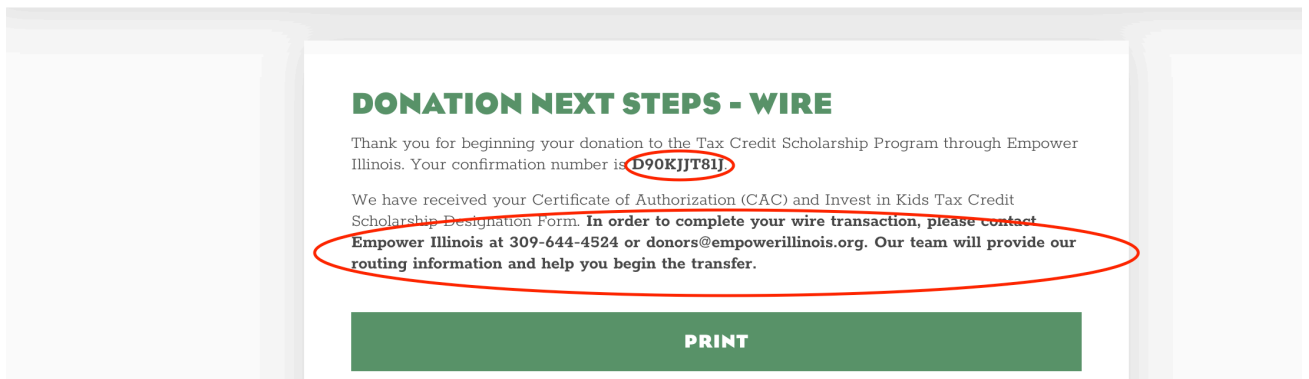
PRINT

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

DONATE USING WIRE TRANSFER

27. Contact Empower Illinois and begin transfer.

- In order to complete your wire transaction, please contact Empower Illinois at 800-616-7606 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.



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