



# 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](https://mytax.illinois.gov).

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- 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.

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

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- 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.

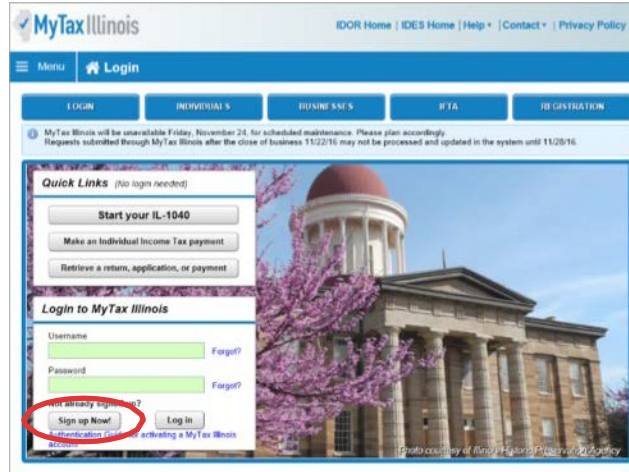
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**05.** Your Letter ID will be mailed to the address on your last year's tax return. You should receive it within 7-10 business days.

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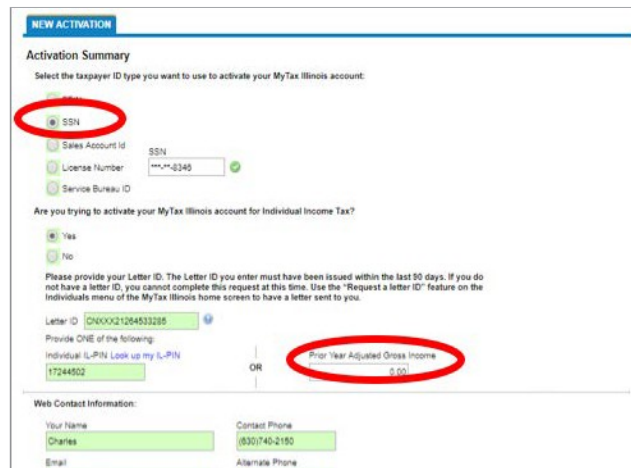
# AFTER YOU HAVE RECEIVED YOUR LETTER ID ACTIVATE YOUR ACCOUNT

**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.



**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'.

This screenshot shows the same 'Request' window as the previous one, but with the 'IL-PIN' field circled in red. The 'Social Security Number' field is also redacted. 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 first section is 'Web Contact Information' with fields for 'Your Name' (Charles), 'Contact Phone' (830/740-2150), 'Email' (charles.pays@gmail.com), and 'Alternate Phone'. The second section is 'Web Logon Information' with a 'Pick a username, you'll use this to login to MyTax Illinois:' field (ispays), a 'Pick your password:' field, and a security question 'In case you forget your password:' with the answer 'in what city does your nearest sibling live?' (Chicago). Below this is a 'Confirm Important Information:' section with 'Confirm Email' (charles.pays@gmail.com) and 'Confirm Password' fields.

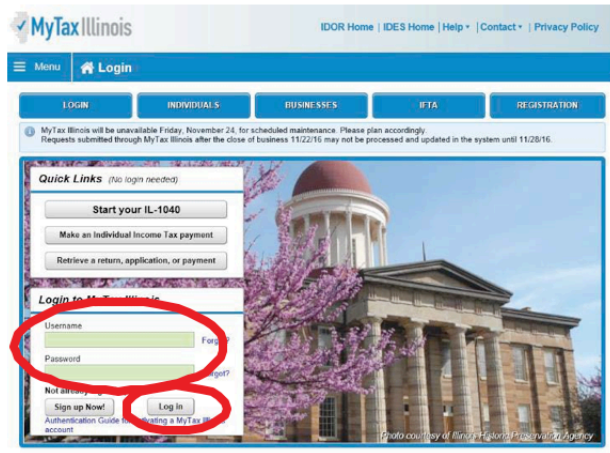
The screenshot shows the MyTax Illinois 'Request' page. At the top right, there are links for 'IDOR Home', 'IDES Home', 'Help', 'Contact', and 'Privacy Policy'. Below the navigation bar, there is a 'Submit' button circled in red. Below the button is a yellow box with the text: 'Please fill out all required 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

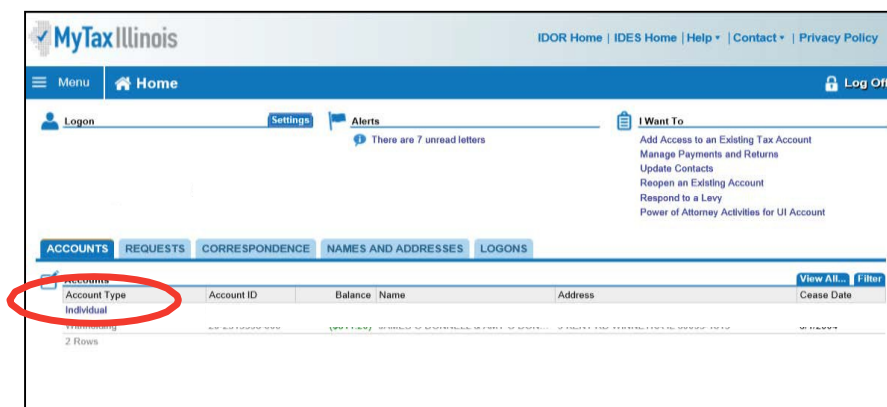
Only donors who have activated an account with the Illinois Department of Revenue will be able to reserve a Tax Credit. If you have a Username from a previous year, log in using that Username and Password. If you cannot access your account, contact IDOR at 800-732-8866 to resolve this issue. If this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



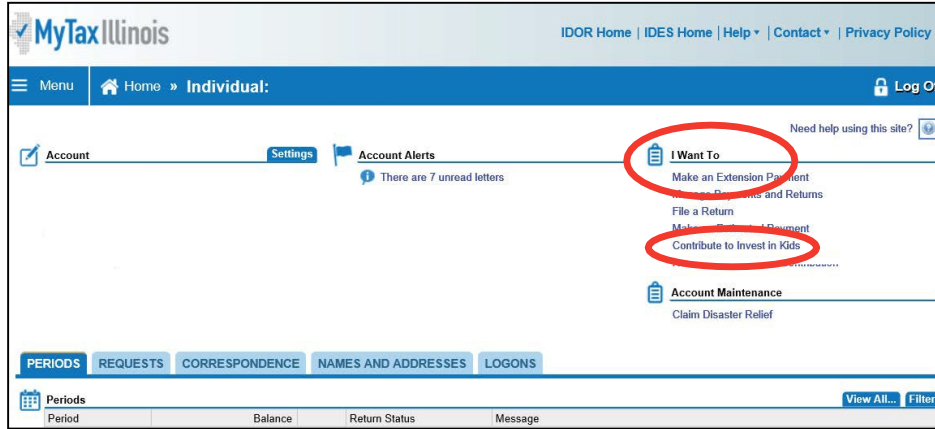
12. Once logged in, you will be taken to your home screen.

- 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.



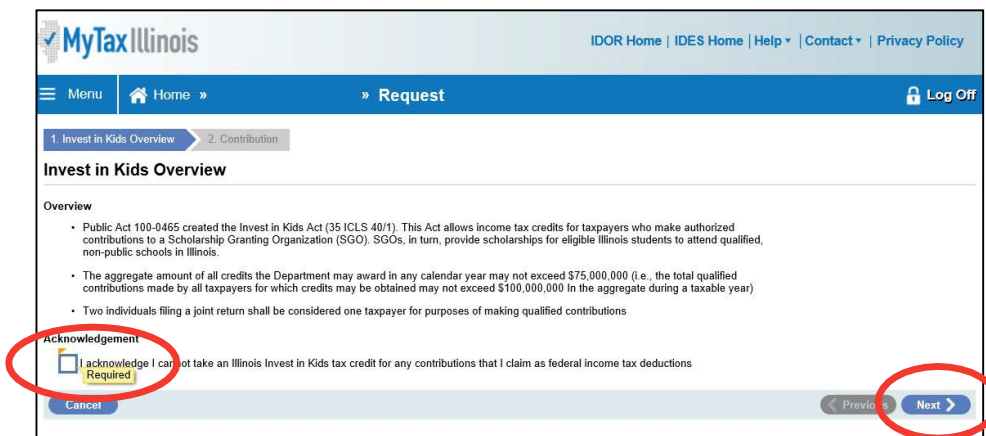
13. Under the "I Want To" section in the top right corner, click on "Contribute to Invest in Kids."

- This will take you directly to the credit application.



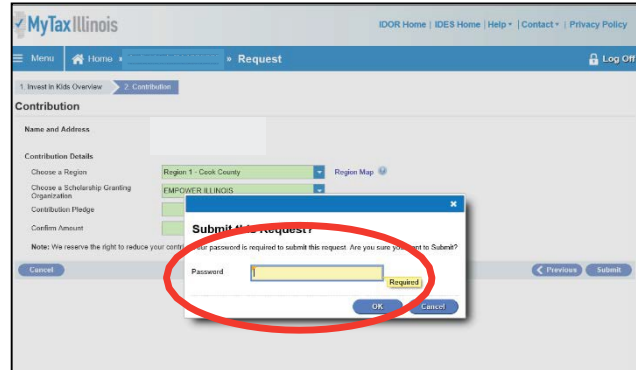
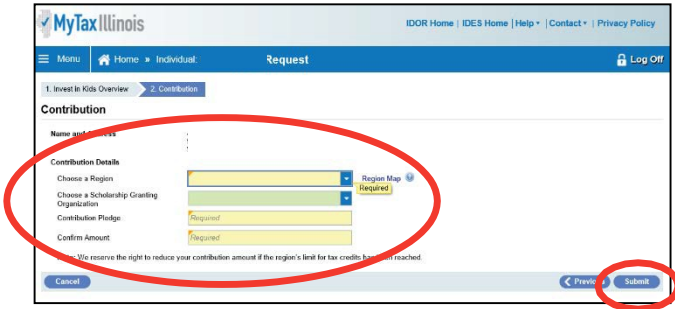
14. The first screen of the application is an overview of the program.

- 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.



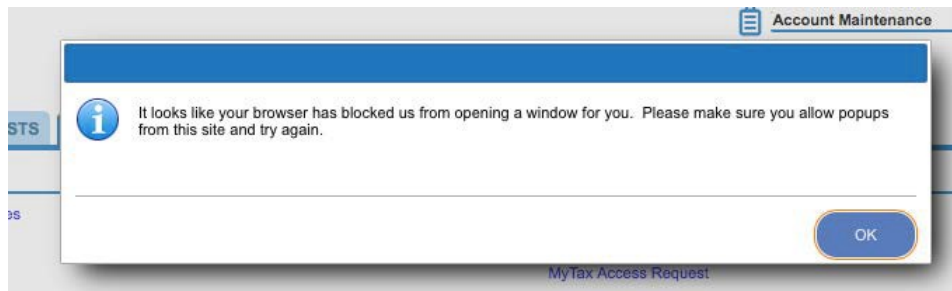
15. Fill out the requested information on the "Contribution" screen.

- 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.

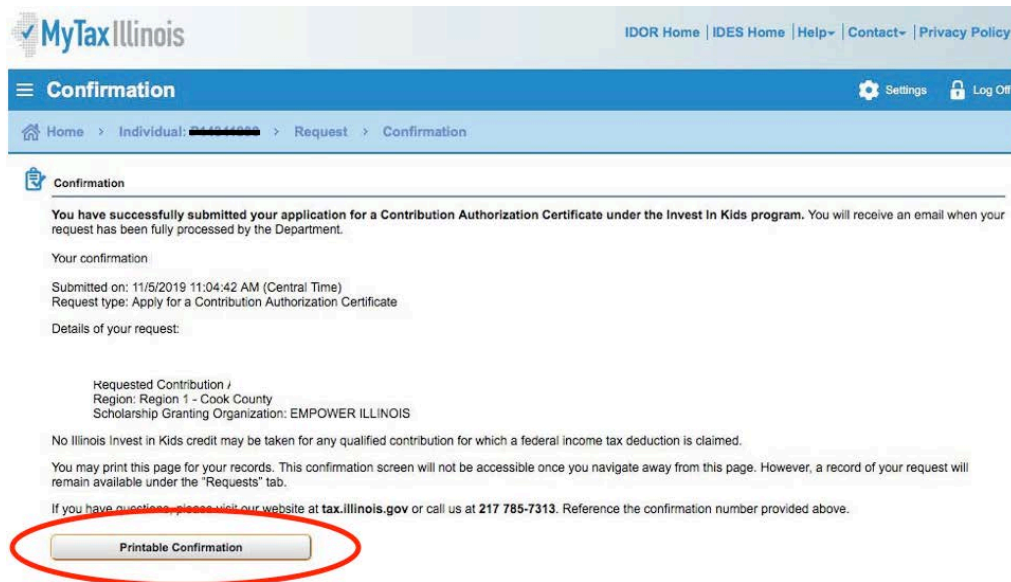


16. Access Your Contribution Letter.

- 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.



## MAKE YOUR DONATION

18. Visit EmpowerIllinois.org.

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



Make My TCS Donation

Charitable Giving



For more information or questions, please call 800-616-7606 or email [donors@empowerillinois.org](mailto:donors@empowerillinois.org).

## 19. Start your donation.

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- 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](mailto:donors@empowerillinois.org).

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[Privacy](#)   [Terms](#)

## 20. Enter the donor's email address.

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**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](mailto:donors@empowerillinois.org).

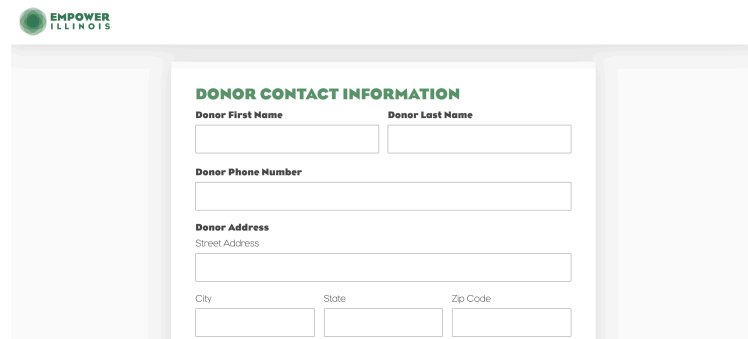
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## 21. Confirm or enter contact information.

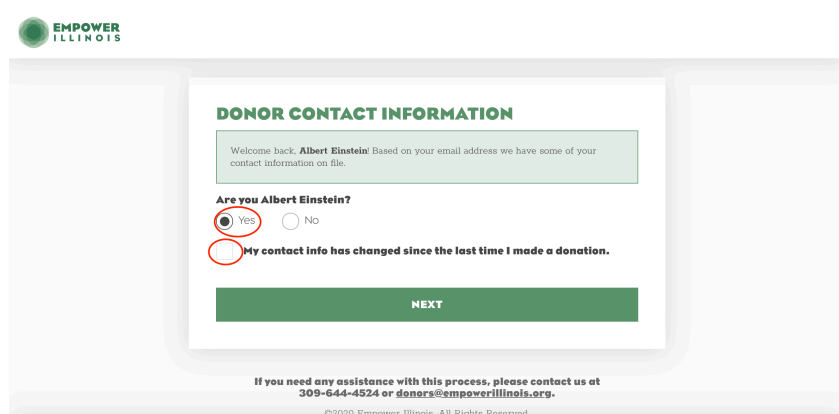
- If you are a new donor, or if we do not have a record of the email address you entered, you will be prompted to fill out a contact form.



The screenshot shows the 'DONOR CONTACT INFORMATION' form. At the top left is the 'EMPOWER ILLINOIS' logo. The form title is 'DONOR CONTACT INFORMATION'. It contains the following fields:

- Donor First Name**: A text input field.
- Donor Last Name**: A text input field.
- Donor Phone Number**: A text input field.
- Donor Address**: A section with a 'Street Address' text input field, and three smaller input fields for 'City', 'State', and 'Zip Code'.

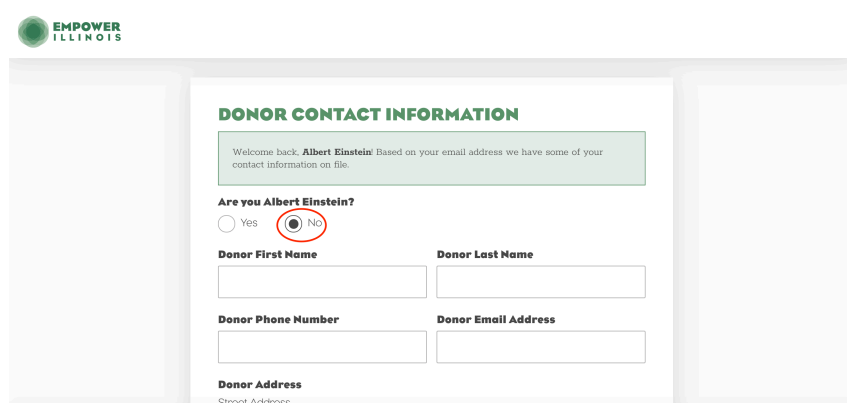
- If you are a returning donor, we may have your email address and some other contact information on file. Please confirm you are the donor associated with the email you entered by selecting “Yes.”
- If your contact information (phone number, address, etc.) has not changed since the last time you donated,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



The screenshot shows the 'DONOR CONTACT INFORMATION' form for a returning donor. At the top left is the 'EMPOWER ILLINOIS' logo. The form title is 'DONOR CONTACT INFORMATION'. It contains the following elements:

- A message box: "Welcome back, **Albert Einstein**. Based on your email address we have some of your contact information on file."
- A question: "Are you Albert Einstein?" with two radio button options: "Yes" (selected) and "No".
- A checkbox: "My contact info has changed since the last time I made a donation." (unchecked).
- A green "NEXT" button.
- Footer text: "If you need any assistance with this process, please contact us at 309-644-4524 or donors@empowerillinois.org. ©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.

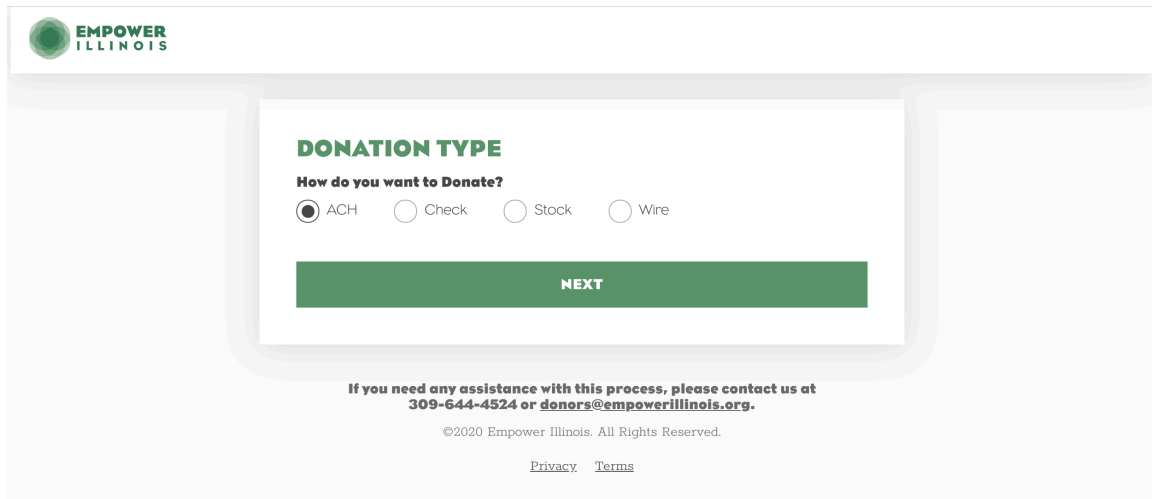


The screenshot shows the 'DONOR CONTACT INFORMATION' form for an incorrect donor. At the top left is the 'EMPOWER ILLINOIS' logo. The form title is 'DONOR CONTACT INFORMATION'. It contains the following elements:

- A message box: "Welcome back, **Albert Einstein**. Based on your email address we have some of your contact information on file."
- A question: "Are you Albert Einstein?" with two radio button options: "Yes" (unchecked) and "No" (selected).
- Form fields: "Donor First Name", "Donor Last Name", "Donor Phone Number", "Donor Email Address", and "Donor Address" (with a "Street Address" sub-label).

## 22. Select your donation type.

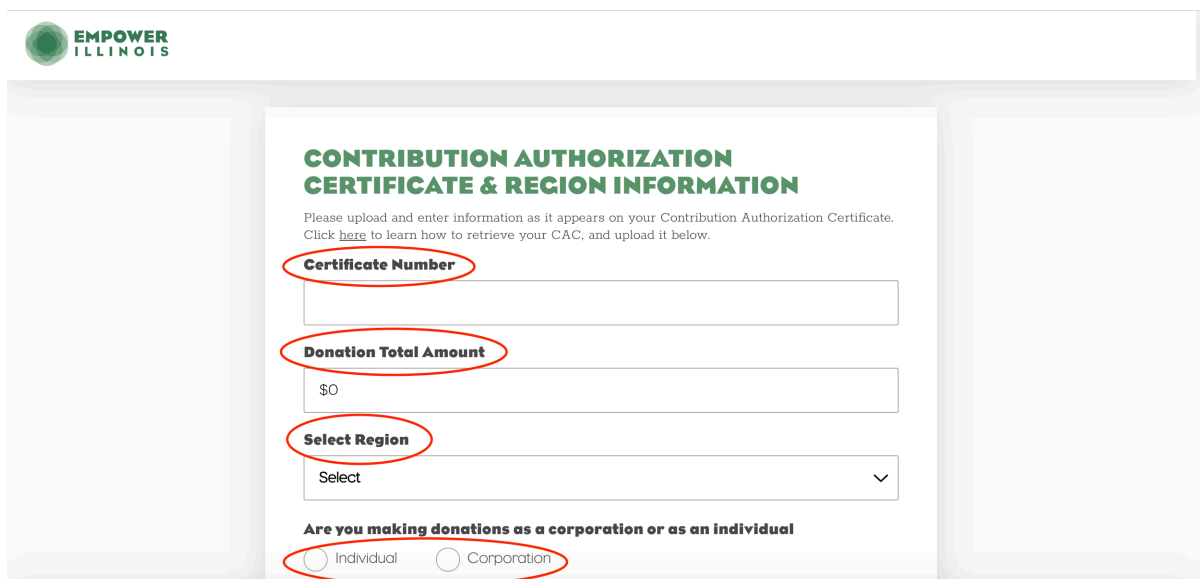
- Please indicate whether you would like to donate by ACH, Check, Stock, or Wire, and click “Next.”



The screenshot shows the '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'.

## 23. 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 input fields: 'Certificate Number', 'Donation Total Amount' (with a '\$0' placeholder), 'Select Region' (a dropdown menu), and 'Are you making donations as a corporation or as an individual' (with radio buttons for 'Individual' and 'Corporation').

## 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.

**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**

## 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.

**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

## 26. 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**

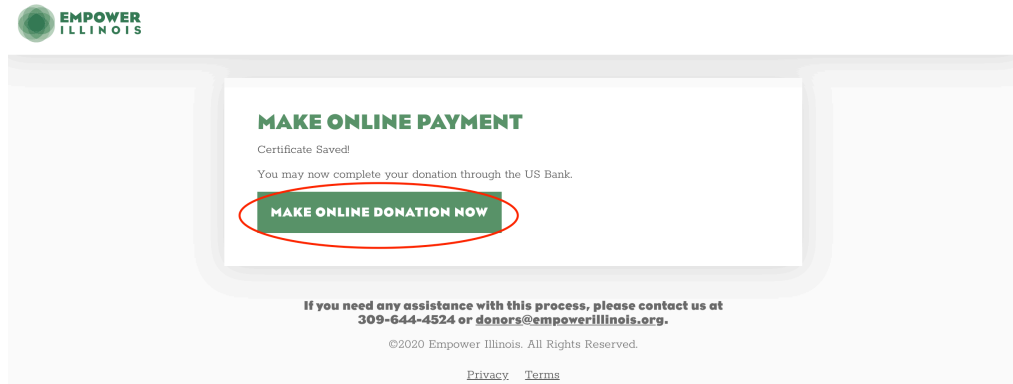
**STOCKS AND BONDS**

**WIRE**

## DONATE BY ACH

### 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.

**29.** Click "Continue."

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

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## 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 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

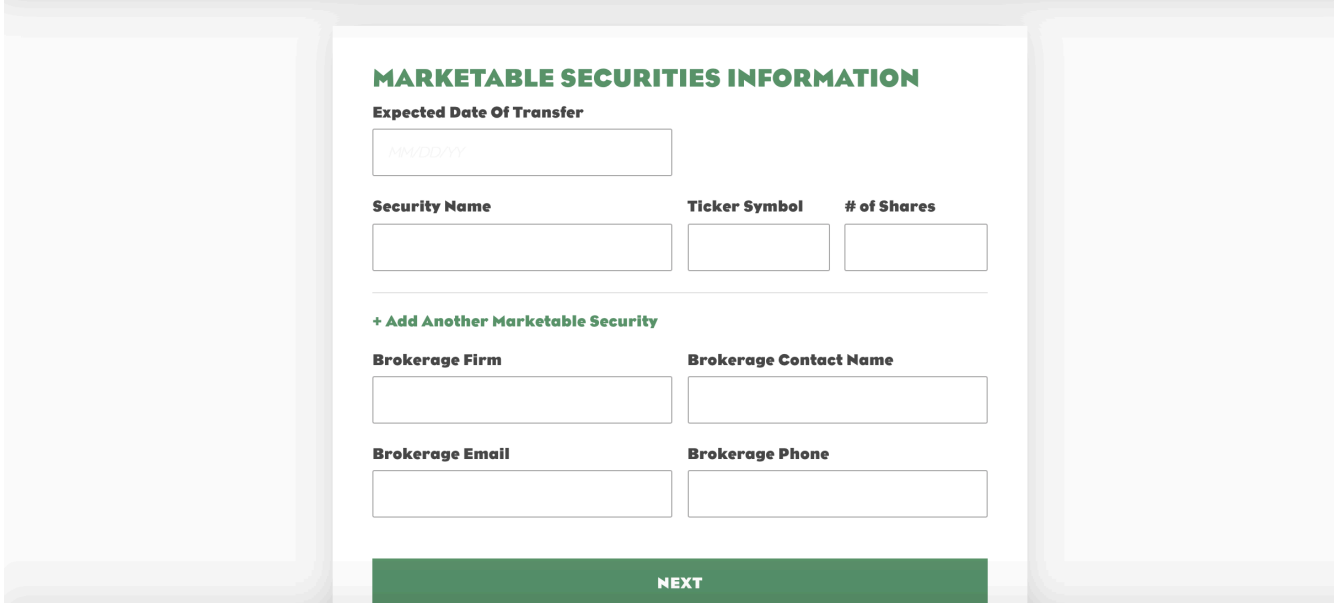
As a reminder, you must send in your check in order for us to finish processing your donation. We cannot issue you a Certificate of Receipt until the funds are received. You will receive a thank you letter from Empower Illinois when your donation is complete.

**PRINT**

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

## DONATE USING STOCKS AND BONDS

27. Complete your banking information.



The screenshot shows a web form titled "MARKETABLE SECURITIES INFORMATION" with the Empower Illinois logo in the top left. The form includes the following fields:

- Expected Date Of Transfer:** A text input field with the placeholder "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.

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](tel:800-616-7606) or email [donors@empowerillinois.org](mailto: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**

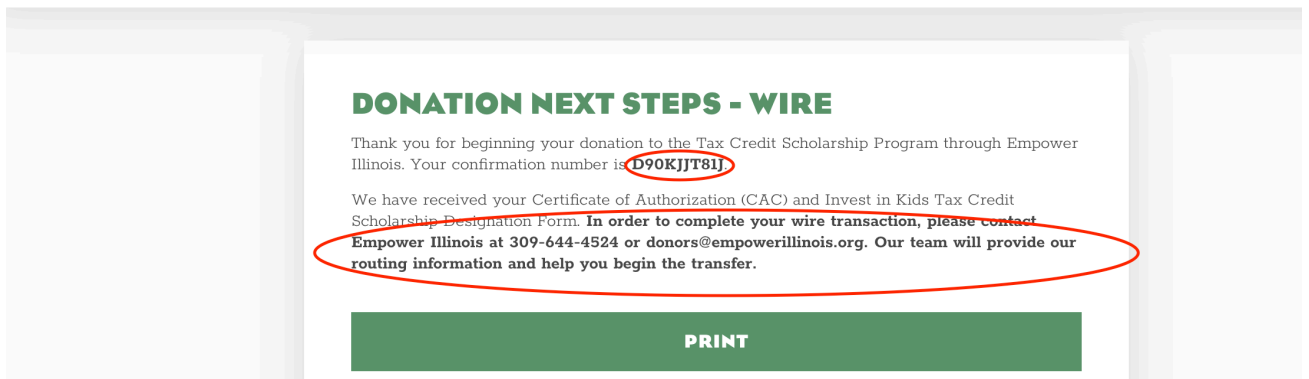
**29.** Success! You have completed your Empower Illinois tax credit scholarship donation.

## DONATE USING WIRE TRANSFER

**27.** Contact Empower Illinois and begin transfer.

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- In order to complete your wire transaction, please contact Empower Illinois at 800-616-7606 or [donors@empowerillinois.org](mailto: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.

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