Steps to reserve a tax credit through the Illinois Tax Credit Scholarship Program

1. Register with the Illinois Department of Revenue by setting up a MyTax Illinois online account.

Please note as part of the process of creating an account, you must request a “Letter ID” from the Illinois Department of Revenue via the “Individuals” menu on MyTax Illinois, which will be sent via U.S. mail within 7 to 10 business days. Once you receive the “Letter ID,” you will be able to create an account.

This video from the Illinois Department of Revenue explains the steps to set up an account: https://www.youtube.com/watch?v=P2ZZ7bShMao&feature=youtu.be

Refer to pages three to seven of this document for screenshots of this process.

The credits are awarded on a first-come, first-served basis and donors must have a MyTax Illinois account in order to reserve credits.

Or, if you already have a My Tax Illinois account, skip to step 2.

2. Log-in to your MyTax Illinois Account. Click on Individual under account type. Then, go to the right hand corner and click on Contribute to Invest in Kids to apply for a Contribution Authorization Certificate.

- Designate the region to which your contribution is directed. Note that Big Shoulders Fund is authorized to issue scholarships in the following regions:
  - Region 1 – Cook County
  - Region 2 – Northern Counties.
- Designate the Scholarship Granting Organization to which your contribution is directed (e.g., Big Shoulders Fund).
- Enter the full amount of the contribution you intend to make.
- Check the box authorizing the Department of Revenue to share your name and email address with Big Shoulders Fund and enter your email address. This way we can follow-up with you and remind you of any upcoming contribution deadlines.
- Click SUBMIT

3. You will receive your Contribution Authorization Certificate (CAC) via your MyTax Illinois account within three days. You then have 60 days (per CAC expiration date) to send your contribution and your CAC to a Scholarship Granting Organization such as Big Shoulders Fund.

Updated January 13, 2020
When you send your check, please include Big Shoulder Fund’s Designation Form that is linked here. Please note that selecting Big Shoulders Fund as an SGO does not restrict contribution of scholarships for students attending Big Shoulders Fund schools. Individual donors can restrict contributions to individual schools or subset of schools, but this additional step of putting that restriction in writing is necessary to do so.

- **Ways You Can Donate**
  - Check
  - Wire transfer,
  - Online payment
  - Stock

Please email sgo@bigshouldersfund.org for wire and stock instructions. (If donating stock please email sgo@bigshouldersfund.org with the number of shares and company it is coming from.)

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

A document answering frequently asked questions can be viewed by clicking here.

If you have questions or need help at any point in the process, contact Amy Drozda at adrozda@bigshouldersfund.org or 312.751.3850 and she will walk you through the process.
MyTax Illinois Screenshots

Step 1: In order to create a MyTax Illinois account, you first need to Request a Letter ID from mytax.illinois.gov. (This video from the Illinois Department of Revenue also explains this process: https://www.youtube.com/watch?v=P2ZZ7bShMao&feature=youtu.be)

1a) Click on the “Individuals” menu

![MyTax Illinois Individuals Menu Screenshot]

1b) Click on “Request a Letter ID”

![MyTax Illinois Request a Letter ID Screenshot]
1c) On the “IIT Letter ID Request” page (see below), enter your Social Security Number and one of the following: an IL_PIN, 2017 Adjusted Gross Income, IL Driver's License Number, or IL State Identification Number

1d) Click “Submit” and enter and confirm your email address

1e) Click “OK” to submit and receive your confirmation

1f) Print confirmation

1g) 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.
Once you receive the “letter ID”, you will be able to activate your MyTax Illinois account.

1h) Click on “Sign up Now!”

1i) Enter all the required information on the “New Activation Page, which includes the “Letter ID” you received in the mail and either your IL-PIN** or your prior year Adjusted Gross Income

**If you choose your IL PIN click on “Look Up My IL PIN” and follow these steps:
• Enter your Social Security Number and either your IL Driver’s License or your Adjusted Gross Income from 2017
• Click Conduct Inquiry
• Copy your IL PIN and then click back

1j) Enter your “Letter ID” and your IL PIN and you will be prompted to enter
• Your contact information
• A username and password
• A security question and answer
• Confirmation of your email and password

1j) Click submit to create your account
Step 2: Login to MyTax Illinois account and reserve your tax credit.
Big Shoulders Fund is an Approved SGO in regions 1 and 2

Big Shoulders Fund is the second SGO in the selection list

Screen returned by IL-DOR for Successfully completed application
Step 3: Obtain the Contribution Authorization Certificate, which you will need to provide to Big Shoulders Fund with your donation.
Step 4: Obtain the Certificate of Receipt for use in filing taxes.
To rescind an original donation:

![Image of the MyTaxIllinois website showing the process to rescind an authorized contribution.](image-url)