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, scroll down to the 'Individuals' box on the left.

2. Click on 'Request a Letter ID.'

3. 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

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

5. 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.
06. Log on to mytax.illinois.gov and click 'Sign Up.'

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’

**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

**10.** Click ‘OK’ on the next screen. You will receive email confirmation that your account was activated. Email Rev.MyTaxHelp@Illinois.gov with questions.
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.

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.

11. Visit mytax.illinois.gov

12. If you have not already, set up two-step verification for your account. Add your email address and enter the security code sent to you.

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

- Click “view more account options.”
- Please note if you are applying as a business, you will need to use a business account instead of an individual account.
14. Under the “Account Options” section, click on “Contribute to Invest in Kids.”

- This will take you directly to the credit application.

15. 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.
16. 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.

17. Access Your Contribution Letter.

- On your mytaxillinois home page, click “View More Account Options.” Then click “View Account Letters” (picture 1).
- Under "Letters" you will see your "Invest in Kids Contribution Application." **This is your CAC.** Click on the link to open a PDF of your letter.
- 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.
18. **View or Print Confirmation for Reserving Your Tax Credit**

**Confirmation**

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.

Your confirmation number is 0-912-461-584.

Submitted on 9/7/2021 7:31:08 AM (Central Time)
Request type: Apply for a Contribution Authorization Certificate
Details of your request:
Account number: P44757445
Tax year: 2021
Requested Contribution Amount: $1,000.00
Region Region 2 - Northern Counties
Scholarship Granting Organization: EMPOWER ILLINOIS

No Illinois Invest in Kids credit may be taken for any qualified contribution for which a federal income tax deduction is claimed.

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 in your account.

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.

[Printable Confirmation]
[OK]

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**MAKE YOUR DONATION**

19. 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.
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 (see this example), and click “I Have My Certificate.”

21. Enter the donor’s email address.
22. 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.

![Contact Form Image]

- 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.”

![Confirmation Image]

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

![Correction Form Image]
23. Select your donation type.

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

24. 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).
25. 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.

If you need help finding your CAC on mytaxillinois.gov and uploading it to the donor wizard, view our step-by-step guide.
26. 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.

27. Review donor authorizations.

Total Certificate Amount: $00

☑ I authorize Empower Illinois to share my donation information with any designated schools.

☑ 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 105/2005/85 of the Illinois Invest in Kids Act, I permit 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.

☑ 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 allocate the 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.

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

ACH  CHECK  STOCKS AND BONDS  WIRE  CREDIT CARDS
28. Make online donation.

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

29. Complete payment and contact information, if not pre-populated.
30. Click "Continue."

31. Success! You have completed your Empower Illinois tax credit scholarship donation.
DONATE BY CHECK

28. 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.

29. Success! You have completed your Empower Illinois tax credit scholarship donation.
DONATE USING STOCKS AND BONDS

28. Complete your banking information.


- 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 Da3v7plzi2. 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 888-466-7606 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.

30. Success! You have completed your Empower Illinois tax credit scholarship donation.
**DONATE USING WIRE TRANSFER**

28. 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.

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

29. Click "Checkout" to enter the hosted payment page.
30. Enter your credit card information and click “Submit Payment.”

31. Agree to the Terms and Conditions by checking the box and click “Submit Payment” again.

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