



IDES Employer and Service Bureau MyTax/UI

Informational Guide August 2017

General Information

- The Illinois Department of Revenue (IDOR) and the Illinois Department of Employment Security (IDES) are two separate agencies that are using the same portal to process the various withholding and unemployment insurance reports and taxes
- The relationships that you may have (Service Bureaus, TPAs, etc.) and mailing addresses for example can be different between the two agencies
- Adding, changing or modifying information on one tab (IDOR) does not automatically make a change with the Unemployment Insurance (IDES) tab
- There will be separate tabs for each type of tax
- At this point, you can't make one payment to satisfy both IDOR and IDES balance; they must be two separate payments
- You can continue to mail in paper documentation or fax in documentation to IDES as you have in the past
- Wage reporting and payment processes and deadlines have not changed
- The joint IDOR and IDES registration process for new employers will begin on Monday, September 11, 2017

Employer

MyTax Illinois/TaxNet

- MyTax Illinois uses alerts and messages on the home page to let you know that you have mail or correspondence in your secure MyTax Illinois inbox
- IDES will never email you sensitive and critical correspondence
- TaxNet logons and passwords will not carry over to MyTax Illinois
- If you have already established a MyTax Illinois account, on September 11, 2017 or any time thereafter, you can log in to MyTax Illinois and if you have a master account, you will be able to immediately see your UI process tab
- If you do not have a MyTax Illinois account and would like to establish one, please visit the MyTax Illinois website or contact the IDOR Central Registration staff at 1-217-785-3707 for assistance
 - You may need to provide additional information for authentication purposes such as previous taxable wages, various owner/officer information, etc.
- MyTax Illinois account structure operates in a similar fashion as TaxNet.
 - MyTax Illinois has a Master Account concept like the TaxNet Super User concept
 - MyTax Illinois has an Account Manager concept like the TaxNet User concept
 - The Master Account delegates responsibilities and options to the Account Manager
- IDES may be eliminating the ability to establish a new registration, establishing bank information and performing wage corrections after Friday, August 25, 2107
- There is a very limited amount of high level summary data that will get converted from TaxNet to MyTax Illinois
 - Between now and September 4, 2017, you may want to print off relevant information such as reports, confirmation pages or correspondence
 - After September 11, 2017, IDES Employer Hotline staff will be able to assist you with TaxNet documentation requests upon account verification
- If you use third-party software to create your CSV file, since the file format is not changing there should not be an impact on your process
- If you use a third-party software like QuickBooks (FSET filers), there should not be an impact on your current reporting process
- If you use third party software like QuickBooks (FSET filers) and if you file after September 4, 2017 and before September 11, 2017, IDES will hold your files and begin processing them on September 11, 2017 and apply them to MyTax Illinois, not TaxNet
- If you currently use a service Bureau to handle your tax processing needs, we will be providing transition information to them directly

- It is very likely that MyTax Illinois will be temporarily down over the September 9th weekend for the upgrade; consult the MyTax Illinois website for specific information

Quarterly ICESA Filers

- There are minor changes to the file format
- If you use third party software to create your ICESA files, you may want to contact them about the changes listed below
 - For the E record position 267, you will need to fill with either an
 - O for original
 - A for amendment which is a full file replacement
 - S for supplemental which is used when adding employees to your original file
 - For the T record positions 258-267, the Document Control Number field is now “Not Used by IDES”

Zero Wage Filing

- On August 31, 2017, the zero wage tele-filing system will be decommissioned
- There will be several new options available to employers
 - From the MyTax Illinois home page, click on the Businesses tab and you will find an option to File Zero Wage Report (UI-3/40)
 - Click on that option and enter your FEIN, UI Account Number and Filing Period
 - Enter an email address if you would like to receive an email confirmation
 - Employers will also be able to file their quarterly zero wage reports through MyTax Illinois if you already have an account set up
 - Employers can still file by paper quarterly UI 3/40s by downloading and completing the approved form from the IDES website

SIDES

- As an employer, you will be able to establish a SIDES profile through MyTax Illinois

FTP Filers

- The last day to file FTP wage reports is August 31, 2107

(Employer section revised 8/10/17)

Service Bureau

Registration Process

- If you are a registered Service Bureau, IDES will send you a verification PIN in early August 2017
- You will use that PIN along with your Service Bureau ID to create a MyTax Illinois account
- You will then be provided with an authorization code to complete your registration process
- The first time that you can create your account is on Monday, September 11, 2017
- You will have limited functionality on Monday, September 11, 2017
- The overnight batch process will establish or link all of your clients which will be available for you to review on Tuesday, September 12, 2017
- You will have full functionality on Tuesday, September 12, 2017
- It is very likely that MyTax Illinois will be temporarily down over the September 9th weekend for the upgrade; consult the MyTax Illinois website for specific information

Quarterly ICESA Filers

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Rate Exchange

- The current rate exchange process will end with the information tentatively scheduled for release in late August or early September 2017
- The new rate exchange process will officially begin on September 11, 2017
- With the new rate exchange process, there is no preliminary file that you need to submit to IDES

- As a registered Service Bureau, you will be able to see and receive the rate information and account balance for all of your clients at any time if you have the following information established
 - Employer signed Power of Attorney
 - Special Mailing Form (LE-10) & UI-1M) for the Rate Notice (UI-5A/UI5B)
 - And/or the Employer Contribution & Wage Report (UI-3/40)
- The process should work this way
 - You will initiate the request to receive the information on any business day
 - The following business day you will receive an alert that you have pending mail
 - In your inbox (e-services profile) will be a CSV file containing the following information
 - Rate
 - Rate Year
 - Client's Name
 - Client's Address
 - Account Balance
 - FEIN
 - UI Account Number
- You will only receive your clients' current year rate
- You will only receive rates for clients in which you hold an active POA
- The rate exchange file will show credits/overpayments with a negative sign (-)
- There will always be a header row (row 1) in the rate exchange file
- The annual rates will continue to be mailed out in late November
- You will not be able to receive a downloaded file of your client's 2018 rate until January 2018

POA/MOU/Bulk Upload

- The new POA MOU is strictly optional and is only applicable to IDES
- A Service Bureaus can establish an MOU before the September 11, 2017 cutover or after
- Regardless of whether you have established an MOU or not, your currently registered clients will still convert over from TaxNet to MyTax Illinois if you are a registered Service Bureau
- One MOU will cover all of your clients
- The maximum number of years for the MOU is 5 years in Section K – Term and Termination
- You may want to review your current list of clients for accuracy and update as needed

Bulk Extensions

- As a registered Service Bureau, you can file bulk extensions for your clients in accordance with the current compliance policies and procedures
- The process should work this way
 - You will initiate the request to bulk extend the reporting deadlines for your clients
 - The following day you will receive an alert that you have pending mail
 - In your inbox (e-services profile) will be a text file containing the following information
 - The quarter and year for the extension
 - List of FEIN and corresponding UI account numbers that will have the extension applied to them
- The application of the extension does not change the tax payment deadline only the reporting deadline

SIDES

- As a Service Bureau, you will be able to establish a SIDES profile for your clients through MyTax Illinois

FTP Filers

- The last day to file FTP wage reports is August 31, 2107

Options available as a Service Bureau versus a TPA

	Service Bureau w/ MOU	Service Bureau w/out MOU	TPA
File wage reports on behalf of your clients	✓	✓	✓
Make payments on behalf of your clients	✓	✓	✓
File and manage protests on behalf of your clients	✓	✓	✓
Manage your client relationships individually	✓	✓	✓
Download UI tax rate information for all clients in a single file from MyTax	✓	✓	
Submit filing extensions for clients in bulk through single file upload	✓	✓	
Maintain existing client relationships after cutover	✓	✓	
Receive client correspondence at multiple addresses	✓	✓	
Manage your client relationships in bulk through single file upload	✓		
Manage all MyTax activities under a single logon			✓

(Service Bureau section revised 8/10/17)