


# MY LOCAL TAX

New Online Portal for Local Government Accounts

# MY LOCAL TAX

- New online portal for local government officials rolled out June 3, 2019
  - Provides centralized location to access information from IDOR
  - Services include:
    - Verify tax locations
    - View and print prior correspondence
    - Request and receive reports
    - Submit inquiries
    - Request updates to your accounts
  - Users include clerks, treasurers, and other local officials
  - Receive an email when there is new correspondence in your account
  - This portal replaced both the tax location verification and rebate sharing agreement web applications



Individuals ▾ Businesses ▾ Tax Professionals ▾ **Local Governments ▾** Forms ▾ Research ▾

Revenue ▸ Local Governments ▸ Local Tax Allocation

## Local Tax Allocation

- [Most Frequently Used Links](#)
- [Research and Statistics](#)
- [Tax Rate Changes](#)

### Distribution Information



- [Monthly Detailed Disbursement Amounts](#)
- [Tax Types Distributed to Local Governments](#)
- [Changes in Disbursements](#)


### Resources

- [Forms and Agreements](#)
- [Taxpayer Location Verification by Local Governments](#)
- [Rebate Sharing FAQ's](#)
- [Local Government Workshops](#)
- [Electronic Deposit](#)
- [Contacts](#)
- [Links to Local Official Organizations](#)
- [Training Materials for Local Government Officials](#)

LOCAL TAX ALLOCATION

- [Frequently Used Links](#)
- [Research and Statistics](#)
- [Tax Rate Changes](#)



# LOCAL TAX ALLOCATION DIVISION (LTAD) HOME PAGE

- THERE IS A LINK FOR MY LOCAL TAX ON OUR HOME PAGE
- TRAINING MATERIALS ARE ALSO POSTED HERE

## 2019 Local Government Workshop Videos for MyLocalTax

For those of you who could not attend a workshop or just need a refresher on how to complete tasks in MyLocalTax, the following videos are from our Springfield workshop. These videos are broken down into sections so that you can easily find the topic you are looking for.

MLT – [Registration Video](#) 

MLT – [Home Page Video](#) 

MLT – [Allocation Account Video](#) 

MLT – [Rebate Sharing Agreements Video](#) 

MLT – [Allocation Remittance Report Video](#) 

MLT – [Taxpayer Listing Report Video](#) 

MLT – [Tax Location Verification Video](#) 

MLT – [Rebate Sharing Agreement Search Video](#) 

MLT – [Verify Tax Locations Video](#) 

MLT – [Business District Account Video](#) 

MLT – [PPRT Account Video](#) 

## 2019 Local Government Workshop Presentation Handout for MyLocalTax

[Instruction manual for MyLocalTax which includes the handout from our 2019 workshops.](#) This has been updated to cover common questions and comments that have been received since the implementation of MyLocalTax.

## Updated Handout from Prior Workshops

Newer local government officials frequently state that they are looking for the broader, instructional workshops that are usually held. This [updated version of the presentation conducted last year](#), discusses the allocation and distribution of taxes to local governments.

## Frequently Asked Questions

[These FAQ's](#) are a supplement for Informational Bulletin [FY 2019-17](#), New Online Portal for Local Government Accounts and Training Materials for Local Government Officials.

# TRAINING MATERIALS

- If you were unable to attend a 2019 workshop, the following training material is available:
  - Videos of the Springfield workshop broken down by topic
  - The handout from the 2019 workshops
- For newer elected officials
  - The handout from the 2018 workshops
- Frequently Asked Questions (FAQ's)
  - MyLocalTax FAQ's

# MY LOCAL TAX PORTAL STATISTICS

- As of July 31, 2019
  - 419 Confidential Accounts
  - 356 Basic Accounts
  - 775 Total Accounts
- 130 Registrations Denied

# MY LOCAL TAX

## FREQUENTLY ASKED QUESTIONS

# WHY WAS I DENIED?

- 1) Information exchange agreement is not current
- 2) If your municipality imposes a Telecom tax, you do not have current information exchange agreements for both Sales and Telecom
- 3) The registrant is not on the approved list
- 4) Your registration lacked your first and last name in the name field

# WHAT IS THE DIFFERENCE BETWEEN CONFIDENTIAL AND BASIC ACCESS?

- Your name must appear on the authorized list to be granted confidential access
- Those with confidential access can order and view allocation remittance reports through MyLocalTax
- Those with confidential access can also view correspondence that includes confidential information
- All other tasks in MyLocalTax can be completed with basic access
  - Tasks such as entering rebate sharing agreements, ordering taxpayer listings, and verifying tax locations



# WHERE DO I GO IN MY LOCAL TAX TO ORDER REPORTS?

The screenshot shows the Allocation system interface. At the top, there is a navigation bar with a menu icon, the word "Allocation", and user information: "Welcome, Aaron Allen", "Settings", and "Log Off". Below the navigation bar, the breadcrumb trail shows "Home > Allocation: 21040-39328". The main content area is divided into three sections: "Account", "Account Alerts", and "I Want To".

**Account**

CITY CLERK OF TAYLORVILLE  
011-0001-7

> Allocation  
TAYLORVILLE CITY TREASURER  
21040-39328

**Account Alerts**

There are 2 unread letters

**I Want To**

- Enter or Amend Rebate Sharing Agreements
- Request Allocation Remittance Report
- Request Taxpayer Listing Report
- Respond to Tax Location Verification
- Search for Rebate Sharing Agreements
- Verify Tax Locations

Below the main content area, there is a tabbed interface with four tabs: "Recent Periods", "Requests", "Correspondence", and "Names and Addresses". The "Recent Periods" tab is selected.

**Recent Periods**

View All... Filter

Period	Message
6/30/2019	Allocations Available
5/31/2019	Allocations Available

- You must choose an account to order a report
  - Allocation
  - Business District
  - PPRT
- From the Allocation or Business District Accounts, go to “I Want To” and select action
- Note: The only “I Want To” available on the home page is “Send a Message”

# WHAT PERIOD SHOULD I SELECT TO ORDER MY ALLOCATION REMITTANCE REPORT?

- Four-month cycle for distributions
  - January – sales made = Liability Month
  - February – tax returns filed and paid = Collection Month (or Allocation Month)
  - March – returns reviewed = Processing Month
  - April – distributions made = Disbursement Month
- You should order your allocation remittance report for the Collection Month
- In this example, if you want to see January sales, you should order the report for February
- In MLT, the period is the collection month. Using the example above, if you select the February 2019 period in MyLocalTax, you will view allocations made in April 2019

# HAS MY LOCAL TAX CHANGED THE TAX LOCATION VERIFICATION (TLV) PROCESS?

- Due to time savings created by MyLocalTax, LTAD is now reviewing new business registrations using GIS and property tax bills
- Two functions in MyLocalTax for you to complete the TLV process
- For businesses already verified by LTAD, use the “Respond to Tax Location Verification” function in MyLocalTax
- Agree/Disagree
  - If you often disagree, please contact LTAD
- For new/reinstated and discontinued businesses, use the “Verify Tax Locations” function in MLT
- For both functions, the period selected should be the month prior to the date on your letter
  - Letter date = August 1, 2019
  - Period in MLT = July 2019
- Starting in September, the letters will be sent out on the 15<sup>th</sup> of each month, or the next subsequent business day

# WHY HAVE I NOT RECEIVED MY TRI-ANNUAL REPORT?

- IDOR is no longer mailing CD's tri-annually
- The only way to receive confidential financial information now is through MyLocalTax
- Through MLT, you can request allocation remittance reports as often as you like for 1, 3, or 12-month periods
- Your requested report(s) will be viewable in your MLT account within 1-2 business days

# WHY HAVE I NOT RECEIVED MY ANNUAL TAXPAYER LISTING?

- IDOR no longer automatically mails out annual taxpayer listings
- If you have a MyLocalTax account, you will receive your annual taxpayer listing electronically through your account
- If you do not have a MyLocalTax account, please contact LTAD and we can send you your annual listing, either by mail or e-mail
- You can order a taxpayer listing at any time through your MyLocalTax account and receive the file within 1-2 business days

# HOW DO I AMEND A REBATE SHARING AGREEMENT?

- MyLocalTax is now the only way to enter or amend rebate sharing agreements
- First you must “Search for Rebate Sharing Agreements” to get the Rebate ID Number
  - If you cannot find your rebate sharing agreement through the search function, you never submitted your rebate sharing agreement to LTAD
  - You will need to enter your amended rebate sharing agreement as if it were new
- Once you have found your agreement, nothing is editable on the first screen. Your only option is to make a choice from the drop-down menu
- Editable fields are determined by your choice from the drop-down menu

# HOW DO I AMEND A REBATE SHARING AGREEMENT?

Enter or Amend Rebate Sharing Agreements Welcome, Aaron Allen Settings Log Off

Home > Allocation: 21040-39328 > Request

1. Enter or Amend Agreement 2. Existing Agreement 3. Business Information

### Business Information

Municipality/County Name  
Taylorville - Christian County

Business Information

Business Name  
ALDI INC.

ID Type  
Account ID

Account ID  
0433-5910

Location Address(es)

Click on "Add a Record" to add an address.

Addresses	
Street	
Unit Type	
Unit Number	
City	
State	
Zip Code	

Add a Record

- By selecting “Business Information Change,” the Business Information fields on the second page become editable
- You will have to add the address regardless of what you select from the drop-down menu on the previous page
- If you selected “Business Information Change,” nothing will be editable on the third page



# HOW DO I AMEND A REBATE SHARING AGREEMENT?

Enter or Amend Rebate Sharing Agreements

Welcome, Aaron AllenSettingsLog Off

HomeAllocation: 21040-39328Request

1. Enter or Amend Agreement

2. Existing Agreement

3. Business Information

4. Terms of Agreement

### Terms of Agreement

Terms of Agreement

Enter the manner in which the amount of any retailers' occupation tax to be shared, rebated, or refunded is to be determined each year for the duration of the agreement.

Required

Agreement Start Date

6/2/2010

Agreement End Date

6/2/2025

Required

Enter the name of any business that is or is not a party to the agreement but directly or indirectly receives a share, refund, or rebate of the retailer's occupation tax.

### Supporting Documentation

☐

Use the Add button below to add documentation

Attachments

Add

Type	Name	Description	Size
------	------	-------------	------

Save

Cancel

< Previous

Next >

- By selecting “Change in Terms of Agreement” or “Incorrect Information Entered,” the third page will be editable
- You will have to attach the new agreement for LTAD to review



# HOW DO I AMEND A REBATE SHARING AGREEMENT?

Enter or Amend Rebate Sharing Agreements

Welcome, Aaron Allen Settings Log Off

Home > Allocation: 21040-39328 > Request

1. Enter or Amend Agreement 2. Existing Agreement

### Existing Agreement

Choose reason for amending this agreement.

Other

Other:

Required

Required

Please review the existing version of the agreement below.

#### Business Information

Business Name

ALDI INC.

ID Type

Account ID

Account ID

04335910

#### Location Address(es)

Addresses

1303 W BURNETT DRIVE  
TAYLORVILLE IL 62568-0000

- By selecting “Other,” you are required to enter your “other” reason
- The editable fields are the same when selecting “Other” as they are for “Change in Terms of Agreement” and “Incorrect Information Entered”

# MY LOCAL TAX QUESTIONS?

# **TAX DISTRIBUTIONS**

# USE TAX DISTRIBUTIONS

(\$Millions)	Annual Amount	Per Capita	% Change (Annual Amt)
FY-08	139.5	14.0	
FY-09	142.5	14.1	2.15%
FY-10	120.8	11.9	(15.23%)
FY-11	143.8	14.2	19.04%
FY-12	147.9	14.6	2.85%
FY-13	160.7	15.9	8.65%
FY-14	177.5	17.5	10.45%
FY-15	204.8	20.2	15.38%
FY-16	234.1	23.1	14.31%
FY-17	250.2	24.7	6.88%
FY-18	267.5	26.3	6.91%
FY-19	309.4	30.4	15.66%

# INCOME TAX DISTRIBUTIONS

(\$Millions)	Annual Amount	Per Capita	% Change (Annual Amount)
FY-08	1,207.7	94.0	
FY-09	1,118.2	86.4	(7.41%)
FY-10	985.4	75.9	(11.88%)
FY-11	1,012.9	78.0	2.79%
FY-12	1,095.3	85.4	8.14%
FY-13	1,203.6	93.8	9.89%
FY-14	1,223.2	95.3	1.63%
FY-15	1,316.3	102.6	7.61%
FY-16	1,301.1	101.4	(1.15%)
FY-17	1,216.3	94.7	(6.52%)
FY-18	1,162.9	90.4	(4.39%)
FY-19	1,331.0	103.4	14.46%

# MT/CT/CST TAX DISTRIBUTIONS

	Municipal	% Change	County	% Change	County-Wide	% Change
(\$Millions)	(MT 1.00%)		(CT 1.00%)		(CST 0.25%)	
FY-08	1,588.4		55.1		217.0	
FY-09	1,518.3	(4.41%)	51.1	(7.26%)	205.9	-5.12%
FY-10	1,429.5	(5.85%)	44.6	(12.72%)	191.9	-6.80%
FY-11	1,501.2	5.02%	46.3	3.81%	204.0	6.31%
FY-12	1,574.8	4.90%	48.9	5.62%	213.0	4.41%
FY-13	1,604.9	1.91%	48.1	(1.64%)	214.2	0.56%
FY-14	1,663.7	3.66%	51.1	6.24%	222.5	3.87%
FY-15	1,720.1	3.39%	53.4	4.50%	225.9	1.53%
FY-16	1,753.8	1.96%	49.9	(6.55%)	225.3	-0.27%
FY-17	1,758.3	0.26%	49.7	(0.40%)	226.5	0.53%
FY-18	1,796.5	2.17%	52.1	4.83%	231.2	2.08%
FY-19	1,833.6	2.06%	56.2	7.93%	236.4	2.26%

# TELECOM TAX DISTRIBUTIONS

(\$Millions)	Annual Amount	% Change
FY-08	288.6	
FY-09	296.7	2.81%
FY-10	291.3	(1.82%)
FY-11	276.2	(5.18%)
FY-12	301.2	9.05%
FY-13	271.3	(9.93%)
FY-14	259.2	(4.46%)
FY-15	227.4	(12.27%)
FY-16	232.9	2.42%
FY-17	212.8	(8.63%)
FY-18	193.9	(8.88%)
FY-19	189.8	(2.11%)

# PPRT DISTRIBUTIONS

(\$Millions)	Annual Amount	% Change
FY-08	1,560.7	
FY-09	1,368.2	(12.3%)
FY-10	1,136.0	(17.0%)
FY-11	1,401.4	23.4%
FY-12	1,236.0	(11.8%)
FY-13	1,308.2	5.8%
FY-14	1,371.0	4.8%
FY-15	1,434.5	4.6%
FY-16	1,320.5	(7.9%)
FY-17	1,466.8	11.1%
FY-18	1,227.4	(16.3%)
FY-19	1,327.8	8.2%
FY-20*	1,537.0*	15.4%*



# **TAX DISTRIBUTION QUESTIONS?**

# **LEGISLATIVE UPDATE**

# SB 689

- Public Act 101-0009
  - Creates a tax amnesty program
  - Effective Date: October 1, 2019 through November 15, 2019
- This may lead to increased tax collections, and therefore allocations to local governments

# SB 690

- Creates data center construction employment income tax credit and sales and use tax exemption for data centers with DCEO certification
  - Effective Date: Tax year beginning on or after January 1, 2019
- Sources Illinois gambling winnings to Illinois
  - Effective Date: Tax year ending on or after December 31, 2019
- Requires withholding on Illinois gambling winnings of non-residents
  - Effective Date: January 1, 2020
- Creates the Parking Excise Tax Act
  - Effective Date: January 1, 2020
- Creates the Level the Playing Field for Illinois Retail Act
  - Effective Date: July 1, 2020
- Limits the sales tax credit to the first \$10,000 of the selling price for certain traded-in motor vehicles
  - Effective Date: January 1, 2020

# SB 690

- Parking Excise Tax Act
  - 6% of the purchase price for a parking space paid for on an hourly, daily, or weekly basis
  - 9% of the purchase price for a parking space paid for on a monthly or yearly basis
  - IDOR is drafting rules to address this statute regarding local governments

# SB 690

- Level the Playing Field for Illinois Retail Act
  - The intention of this bill is to ensure that local governments are receiving their portion of sales tax revenue from online sales
  - Hard to gauge the impact of this bill without knowing the exact number of your residents that shop online, which online retailers they use, and whether those retailers have an Illinois presence or not
  - Discussions with interested parties are ongoing

# SB 1814

- Public Act 101-0010
  - Brings Illinois into compliance with FAA regulations
    - You have to certify with IDOT by September 1, 2019 whether or not you have an airport-related purpose on which to spend any tax revenue received from aviation fuel sales. IDOT will notify IDOR by October 1, 2019
    - You will have to make this certification every six months
    - If you certify that you do have an airport-related purpose, locally-imposed taxes will be distributed back to you, while the 1.25% portion of the tax collected will be deposited into the State fund
    - If you certify that you do not have an airport-related purpose, any aviation fuel tax will be exempt from locally imposed taxes, and the 1.25% portion of taxes collected on sales within your jurisdiction will be deposited into the State fund
  - Effective December 1, 2019

# SB 1814

- This act also implements:
  - 5% reduction in deposits from the General Revenue Fund to the Public Transportation Fund
  - 5% reduction in deposits to the Local Government Distributive Fund
  - Continued payment from PPRT for public community college base operating grants
  - Continued payment from PPRT for local health protection grants



# SB 1939

- Authorizes municipalities in counties with a population exceeding 3 million to impose a tax on motor fuel at a rate of up to \$0.03/gallon
  - Effective Immediately
- Authorizes Lake and Will Counties to impose a county motor fuel tax
  - Minimum of \$0.04/gallon, maximum of \$0.08/gallon
    - These minimums and maximums are the same for DuPage, Kane, and McHenry as well
  - Effective Immediately
- Beginning July 1, 2021, State will divert 16% of sales tax revenue received from motor fuel and gasoline sales into the Road Fund. The percentage diverted will increase each fiscal year until the entire State sales tax portion (5%) is being diverted to the Road Fund

# HB 1438

- Public Act 101-0027
- Creates the Cannabis Regulation and Tax Act
  - Cannabis Cultivation Privilege Tax
    - Effective Date: September 1, 2019
    - 7% tax on cultivator's gross receipts
  - Cannabis Purchaser Excise Tax
    - Effective Date: January 1, 2020
    - Cannabis with THC level at or below 35% - 10% of purchase price
    - Cannabis-infused products – 20% of purchase price
    - Cannabis with THC level above 35% - 25% of purchase price

# HB 1438

- County Cannabis Retailers' Occupation Tax
  - Effective Date: January 1, 2020
  - Imposed by ordinance in 0.25% increments
  - Administered and enforced by IDOR
  - Tax may not exceed 3.75% of gross receipts from sales of cannabis made in the unincorporated areas of the county
  - Tax may not exceed 3% of gross receipts from sales of cannabis made in a municipality located within the county
- Municipal Cannabis Retailers' Occupation Tax
  - Effective Date: January 1, 2020
  - Imposed by ordinance in 0.25% increments
  - Administered and enforced by IDOR
  - Tax may not exceed 3% of the gross receipts from sales of cannabis made in the municipality
- September 1, 2020 is the soonest these taxes can be imposed
- NOTE: The above rates are from SB 2023 (P.A. 101-0363)

# LEGISLATION QUESTIONS?

# LOCAL TAX ALLOCATION DIVISION

- TELEPHONE: (217) 785-6518
- FAX: (217) 785-6527
- E-MAIL: REV.LOCALTAX@ILLINOIS.GOV
- WEBSITE:  
<https://www2.illinois.gov/rev/localgovernments/LocalTaxAllocation/Pages/default.aspx>