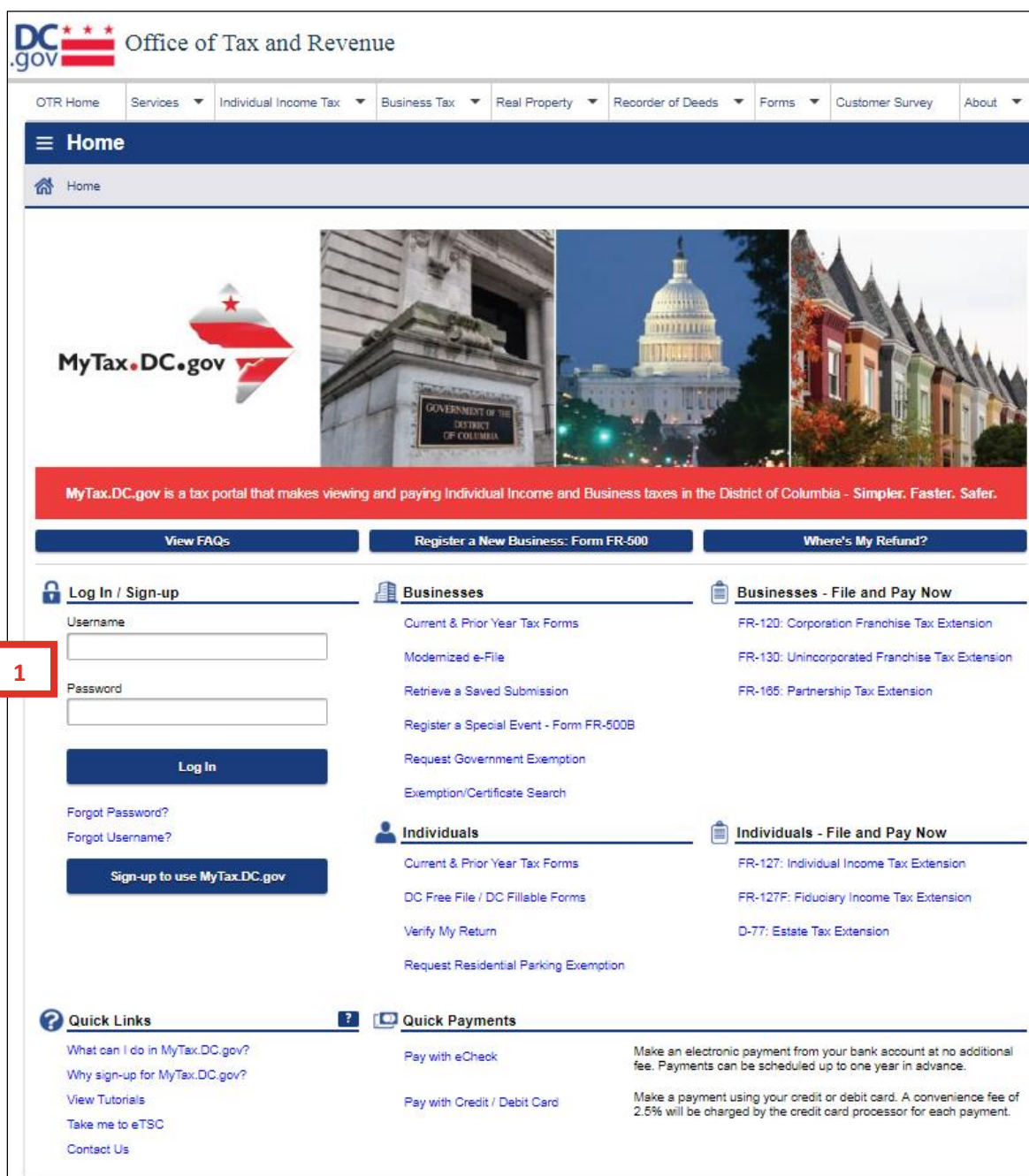


MyTax.DC.gov User Guide:

How to Request an Exemption to File (FR-164)

Organizations who wish to apply for an exemption from the District of Columbia Income and Franchise Tax, Sales and Use Tax, and Personal Property Tax can submit their application via [MyTax.DC.gov](https://mytax.dc.gov) by following this user guide.



The screenshot shows the MyTax.DC.gov homepage. At the top, there is a navigation bar with links for OTR Home, Services, Individual Income Tax, Business Tax, Real Property, Recorder of Deeds, Forms, Customer Survey, and About. Below this is a 'Home' section with a banner for MyTax.DC.gov and a red bar stating 'MyTax.DC.gov is a tax portal that makes viewing and paying Individual Income and Business taxes in the District of Columbia - Simpler. Faster. Safer.' Below the banner are three buttons: 'View FAQs', 'Register a New Business: Form FR-500', and 'Where's My Refund?'. The main content area is divided into three columns: 'Log In / Sign-up', 'Businesses', and 'Businesses - File and Pay Now'. The 'Log In / Sign-up' section has a red box with the number '1' next to it, containing fields for Username and Password, a 'Log In' button, and links for 'Forgot Password?' and 'Forgot Username?'. Below these is a 'Sign-up to use MyTax.DC.gov' button. The 'Businesses' section lists links for 'Current & Prior Year Tax Forms', 'Modernized e-File', 'Retrieve a Saved Submission', 'Register a Special Event - Form FR-500B', 'Request Government Exemption', and 'Exemption/Certificate Search'. The 'Businesses - File and Pay Now' section lists links for 'FR-120: Corporation Franchise Tax Extension', 'FR-130: Unincorporated Franchise Tax Extension', and 'FR-165: Partnership Tax Extension'. The 'Individuals' section lists links for 'Current & Prior Year Tax Forms', 'DC Free File / DC Fillable Forms', 'Verify My Return', and 'Request Residential Parking Exemption'. The 'Individuals - File and Pay Now' section lists links for 'FR-127: Individual Income Tax Extension', 'FR-127F: Fiduciary Income Tax Extension', and 'D-77: Estate Tax Extension'. At the bottom, there are 'Quick Links' and 'Quick Payments' sections. The 'Quick Links' section includes links for 'What can I do in MyTax.DC.gov?', 'Why sign-up for MyTax.DC.gov?', 'View Tutorials', 'Take me to eTSC', and 'Contact Us'. The 'Quick Payments' section includes links for 'Pay with eCheck' and 'Pay with Credit / Debit Card', with descriptions of each payment method.

1. From the [MyTax.DC.gov](https://mytax.dc.gov) homepage, log in using your **Username** and **Password**.

Home Log Off

Home

Logon Settings **Alerts** **I Want To** More...

bsndemo4
John Taxpayer
john.taxpayer@dc.gov
+1 (202) 555-5555
Last logged on 25-Sep-2017
Balance: (\$5,000.00)

There are 5 unread messages
There is 1 unread letter
Pending Account Access Request
1 submission needs attention

View My Web Profile
Register a New Tax Account
Send OTR a message
Manage payments and returns
View FAQ's
Go Paperless

Accounts Submissions Correspondence Names and Addresses Logons Exemptions

Accounts More...

Filter

Corporation Franchise Tax	250-00000832	APOLLO FINANCIAL, INC.	\$0.00
Sales & Use Tax	350-000132190	APOLLO FINANCIAL, INC.	(\$5,000.00)
Withholding Non-Payroll Tax	300-00000833	APOLLO FINANCIAL, INC.	\$0.00
Withholding Wage Tax	300-100011032	APOLLO FINANCIAL, INC.	\$0.00

[Register a New Tax Account](#)

2. In the user profile, under **Accounts**, click the applicable account that you would like to request an exemption (e.g. **Sales & Use Tax**).

Sales & Use Tax Log Off

Home > Sales & Use Tax

Account Settings **Account Alerts** **I Want To** More...

bsndemo4
APOLLO FINANCIAL, INC.
00000-56128
Sales & Use Tax
350-000132190
Balance: (\$5,000.00)

There is 1 unread message

Request a Sales Refund
Request to Close Account
Make a payment
Manage payments and returns
Request a Penalty Waiver

Periods Submissions Correspondence Names and Addresses Logons

Periods More...

30-Sep-2017	(\$5,000.00)	File Return
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3. Click the **More** tab at the top right-hand corner.

I Want To Log Off

Home > Sales & Use Tax > I Want To

I Want To

- [Request a Sales Refund](#)
- [Request to Close Account](#)
- [Make a payment](#)
- [Manage payments and returns](#)
- [Request a Penalty Waiver](#) Make a request to waive Late File Penalty and Late Pay Penalty

Payment Agreement

- [Request Payment Agreement](#)
- [Update Payment Agreement Bank](#)

Request An Exemption

Exemption To File	Request for Exemption To File (FR-164)
Utility Exemption Certificate	Request for Utility Exemption Certificate (OTR-308)
Contractor's Exempt Purchase Certificate	Request for Contractor's Exempt Purchase Certificate (OTR-553)
Certificate of Resale	Certificate of Resale (OTR-368)

4. Under the **I Want To** section, click **Exemption to File**.

Exemption To File (FR-164) Log Off

Home > Sales & Use Tax > I Want To > Exemption To File (FR-164)

1. Exempt Organization

Exempt Organization 5

Instructions

This application is for use by organizations who wish to apply for an exemption from the District of Columbia Income and Franchise Tax, Sales and Use Tax, and Personal Property Tax. Applications are account specific, therefore one application must be completed for each account. All questions must be answered completely on the application. Applications submitted without the required documentation will be denied. Applicants may re-apply once all the required documents are attached with the application. If the Internal Service Revenue (IRS) Determination letter has not yet been issued, complete the application and click "Save." Once the IRS Determination letter is issued, return to this request in MyTax.DC.gov and complete this application with the supporting documents and click "Submit" for review by the Office of Tax and Revenue (OTR).

If approved, OTR will send the applicant an exemption certificate. If denied, the applicant will receive a letter.

Organization Information

ID (FEIN or SSN)	<input type="text" value="234598723"/>	Account #	<input type="text" value="350-000132190"/>	NAICS Code	<input type="text" value="522320"/>	Financial Transactions Processing, Reserve, and Clearinghouse Activities
Name	<input type="text" value="APOLLO FINANCIAL, INC."/>					5a
Trade Name	<input type="text"/>					
Address	<input type="text" value="820 MARYLAND AVE NE"/>					
City, State, Zip	<input type="text" value="WASHINGTON"/>	<input type="text" value="DC"/>	<input type="text" value="20002-6306"/>			

Federal Exemption Status

IRS Code Section	<input type="text"/>	IRS code must be 501(c)(3) or 501(c)(4)
Has IRS Determination Letter been issued?	<input type="radio" value="Yes"/> Yes <input type="radio" value="No"/> No	5b
IRS Determination Letter Effective Date	<input type="text"/>	
IRS Application Submitted On	<input type="text"/>	

Organization Details

If any of the information below is incorrect, please contact the Office of Tax and Revenue Customer Service Administration at (202) 727-4829

Date Activities Began In DC	<input type="text" value="25-Aug-2017"/>
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Answer the following:

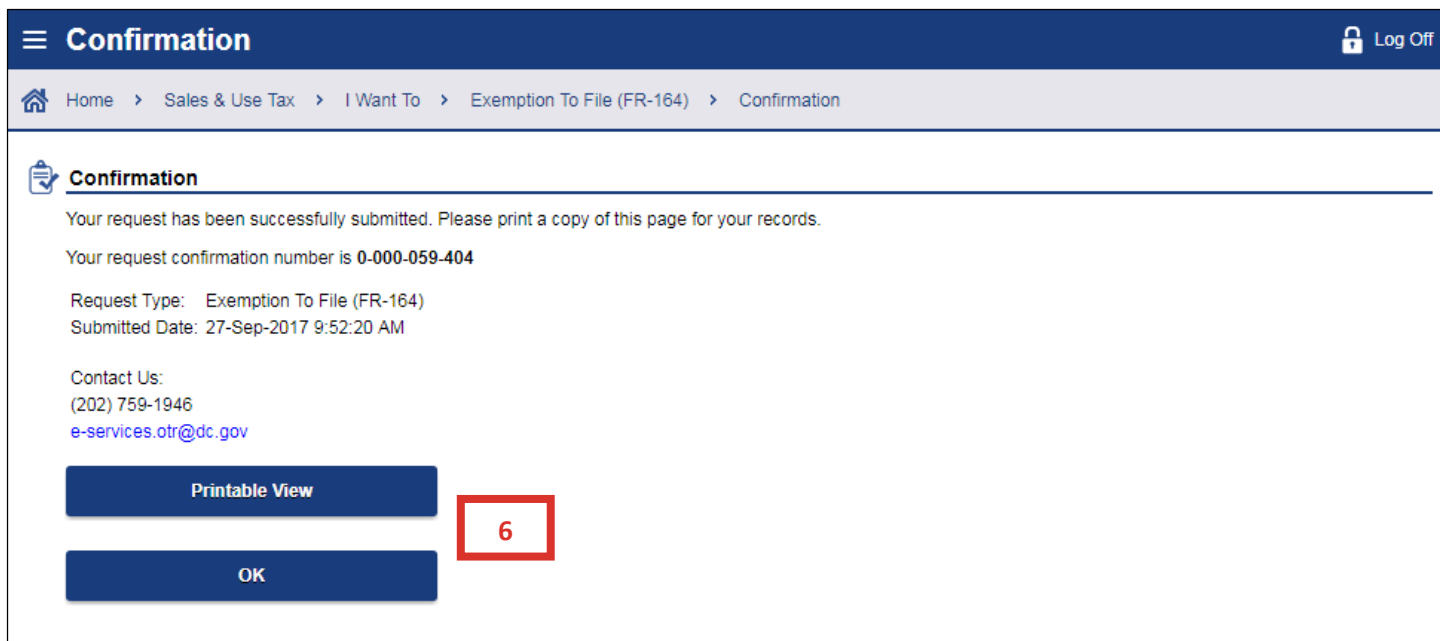
Does the organization control or is it controlled by any other organization?	<input type="radio" value="Yes"/> Yes <input type="radio" value="No"/> No
Is the organization the outgrowth of (or successor to) another organization, or have a special relationship with another organization by reason of interlocking directorates or other factors?	<input type="radio" value="Yes"/> Yes <input type="radio" value="No"/> No
Other than a statutory office, do you maintain regular places of business outside the District?	<input type="radio" value="Yes"/> Yes <input type="radio" value="No"/> No
Does the organization report any unrelated business income on Form 990T to the IRS?	<input type="radio" value="Yes"/> Yes <input type="radio" value="No"/> No
Does the organization file a Form 1120POL U.S. Income Tax Return for Certain Political Organizations with the IRS?	<input type="radio" value="Yes"/> Yes <input type="radio" value="No"/> No
Did the organization establish a political action committee described in section 527(f)(3) of the Internal Revenue Code?	<input type="radio" value="Yes"/> Yes <input type="radio" value="No"/> No
Does the organization sell any tangible personal property or provide personal services to persons or organizations located within the District?	<input type="radio" value="Yes"/> Yes <input type="radio" value="No"/> No
Did the organization purchase any tangible personal property outside the District for use in the District?	<input type="radio" value="Yes"/> Yes <input type="radio" value="No"/> No

Number of Attachments

Type	Name	Description	Size
Add Attachment 5d			

Is the organization exempt from Personal Property Tax?	<input type="radio" value="Yes"/> Yes <input type="radio" value="No"/> No	5e	5f
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5. On the **Exempt Organization** page, please complete the following information:
 - a. Carefully review the pre-populated section to ensure your information is correct. If you notice errors please contact OTR's e-Services Unit at 202-759-1946 or e-services.otr@dc.gov.
 - b. Select the IRS code from the **IRS Code Section** drop down and answer the remaining questions in this section.
 - c. Answer **Yes** or **No** to the questions in this section.
 - d. Attach the required documents (e.g. IRS Determination Letter).
 - e. Answer **Yes** or **No** to the Personal Property Tax exemption question.
 - f. Click **Submit**.



Confirmation Log Off

Home > Sales & Use Tax > I Want To > Exemption To File (FR-164) > Confirmation

Confirmation

Your request has been successfully submitted. Please print a copy of this page for your records.

Your request confirmation number is **0-000-059-404**

Request Type: Exemption To File (FR-164)
Submitted Date: 27-Sep-2017 9:52:20 AM

Contact Us:
(202) 759-1946
e-services.otr@dc.gov

Printable View 6 **OK**

6. A **Confirmation** page displays. To obtain a printed copy of this page, click **Printable View**. Otherwise, click **OK**.