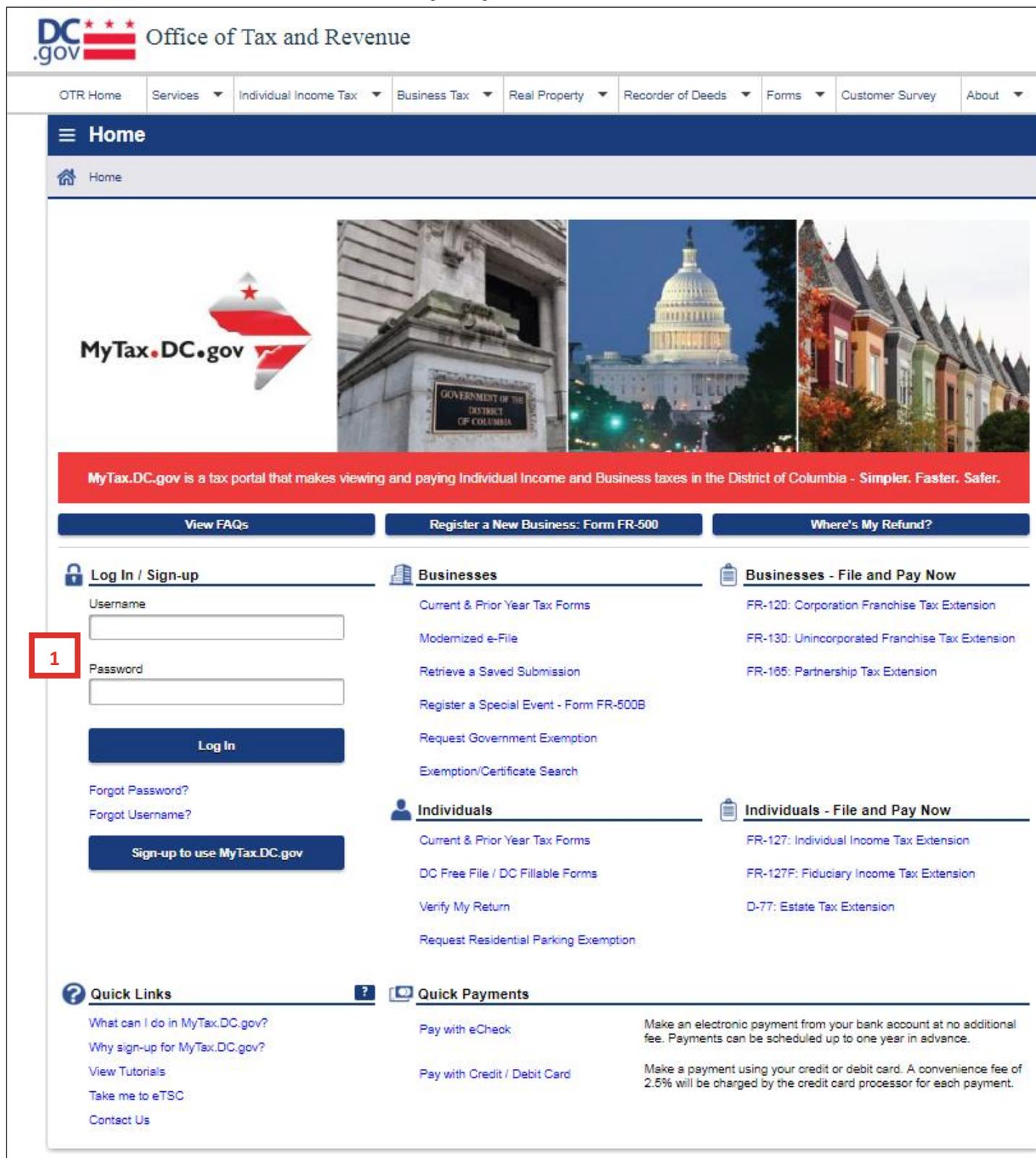


My Tax.DC.gov User Guide: How to View Taxpayer and Account Details



The screenshot shows the MyTax.DC.gov homepage. At the top, there is a navigation menu with links for OTR Home, Services, Individual Income Tax, Business Tax, Real Property, Recorder of Deeds, Forms, Customer Survey, and About. Below the navigation menu is a blue header with a 'Home' button and a home icon. The main content area features a large banner with the MyTax.DC.gov logo and a red banner 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 page is divided into several sections: "Log In / Sign-up", "Businesses", "Businesses - File and Pay Now", "Individuals", "Individuals - File and Pay Now", "Quick Links", and "Quick Payments". The "Log In / Sign-up" section contains a login form with fields for Username and Password. A red box highlights the Password field, and a red box with the number "1" is placed to the left of the Password field. Below the Password field is a "Log In" button. There are also links for "Forgot Password?" and "Forgot Username?". Below these links is a "Sign-up to use MyTax.DC.gov" button. The "Businesses" section includes 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 includes links for "FR-120: Corporation Franchise Tax Extension", "FR-130: Unincorporated Franchise Tax Extension", and "FR-165: Partnership Tax Extension". The "Individuals" section includes 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 includes links for "FR-127: Individual Income Tax Extension", "FR-127F: Fiduciary Income Tax Extension", and "D-77: Estate Tax Extension". 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".

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

The screenshot displays the TRADER MOE'S user interface. At the top, a dark blue header contains the business name 'TRADER MOE'S' and a 'Log Off' button. Below the header, a breadcrumb trail shows 'Home > TRADER MOE'S'. The main content area is divided into three sections: '2a' (Customer Info), '2b' (Alerts), and '2c' (I Want To). Section 2a shows the customer ID '00000-29248' and a balance of '\$604.95'. Section 2b lists alerts such as 'Balance due: \$604.95', '3 unread messages', '1 unread letter', and '1 submission needs attention'. Section 2c provides links for 'View My Web Profile', 'Register a New Tax Account', 'Manage payments and returns', 'View FAQ's', and 'Send OTR a message'. A 'More...' button is located to the right of the 'I Want To' section. Below this, a navigation bar labeled '3' contains tabs for 'Accounts', 'Submissions', 'Correspondence', 'Names and Addresses', 'Logons', and 'Exemptions'. The 'Accounts' tab is active, showing a list of accounts with columns for account type, ID, name, and balance. A 'Filter' input field is at the top of the list. The '3a' label points to the 'Withholding Non-Payroll Tax' account.

Account Type	ID	Name	Balance
Corporation Franchise Tax	250-000001272	TRADER MOE'S	\$604.95
Sales & Use Tax	350-000132193	TRADER MOE'S	\$0.00
Specialized Sales	380-000011793	TRADER MOE'S	\$0.00
Street Vendor	353-000011792	TRADER MOE'S	\$0.00
Withholding Non-Payroll Tax	300-000189006	TRADER MOE'S	\$0.00
Withholding Wage Tax	300-100016031	TRADER MOE'S	\$0.00
Withholding Wage Tax	300-100047001	TRADER MOE'S	\$0.00

2. Upon logging in, you will be taken **Home**, which refers to your system profile.
 - a. In the upper left corner, your customer identification number and business name are displayed.
 - b. Under the **Alerts** section in the center of the page, you will find any alerts for this taxpayer which can include balances, open requests, unread letters, and messages for all associated accounts.
 - c. Under the **I Want To** section, in the upper right corner of the page, you will find a list of available self-service options.
 - d. By clicking the **More** button to the right of the **I Want To** header, you will find an additional list of available self-service options.
3. Under the **Accounts** tab is a list of all the taxpayer accounts.
 - a. To view the details of an account, select one of the account type hyperlinks from the list beneath **Accounts**. For this example, we will select “Withholding Non-Payroll Tax.”

The first time you access your account, the system will prompt you to establish your **Account Settings. Choose a “Type of Access” from the drop-down menu and click **Save**.

4. Since we selected a “Withholding Non-Payroll Tax” account, the Withholding Non-Payroll Tax account detail homepage displays.
 - a. In the upper left corner of the page, you will see the account number and business name.
 - b. Under the **Account Alerts** section in the center of the page, you will see any balances due, open requests, unread letters, and messages associated with this account.
 - c. Listed beneath the **I Want To** section, in the upper right corner of the page, you will find a list of self-service options associated with this account.
 - d. Under the **Periods** tab, you will see a transaction summary line for each filing period. Any periods with an open balances will be reflected to allow you to make online payments.

5. Click into the **Submissions** tab to view all your submissions or activities within your user profile (e.g. submitting a payment, filing a return, updating an address etc.).
 - a. In the **Not Submitted** section, you can see submissions that need attention before processing.

- b. In the **Submitted** section, you can see all activities that you were submitted for processing.
- c. In the **Processed** section, you can see all submissions that were processed through MyTax.DC.gov.
- d. Click the **View All Submissions** tab to see a list of all your submissions. You can filter by **Not Submitted, Submitted** and **Processed**.

The screenshot shows the TRADER MOE'S user interface. At the top, there is a navigation bar with the logo and a 'Log Off' button. Below the navigation bar, there is a 'Menu' button and a breadcrumb trail 'Home > TRADER MOE'S'. The main content area is divided into three sections: 'Settings', 'Alerts', and 'I Want To'. The 'Alerts' section contains three items: 'Balance due: \$604.95', 'There are 3 unread messages', and 'There is 1 unread letter'. The 'I Want To' section contains four items: 'View My Web Profile', 'Register a New Tax Account', 'Manage payments and returns', and 'View FAQ's'. Below the main content area, there is a horizontal navigation bar with tabs: 'Accounts', 'Subr', '6', 'Correspondence', 'Names and Addresses', 'Logons', and 'Exemptions'. The 'Correspondence' tab is selected. Below the navigation bar, there are two sections: 'Messages' and 'Unread Letters'. The 'Messages' section has a 'View All Messages' button and contains three items: 'Return was submitted', 'Return was submitted', and 'Third Party Request'. The 'Unread Letters' section has a 'View All Letters' button and contains one item: 'Sales and Use Tax Certificate'. Red boxes highlight the '6' tab, the 'Messages' header, and the 'Unread Letters' header.

6. Click into the **Correspondence** tab to view your messages and letters.
- a. The Messages section contains responses to messages you have sent to the Office of Tax and Revenue (OTR). Additionally, you will see responses from OTR providing you with updates to your submissions. After a message has been viewed, it will be archived. To access archived messages, click the **View All Messages** button to the right of the **Messages** header.
 - b. The **Unread Letters** section provides an electronic copy of all OTR correspondence. Once an unread letter is viewed, it will be archived. To access archived letters, click **View all Letters** to the right of the **Unread Letters** header. This page lists both your unread *and* your viewed letters.

Messages 7 Log Off

Home > TRADER MOE'S > Messages

Unread 0 **Inbox** Outbox 7a

Inbox 7b Send Message Mark All As Read

Filter

Posted	Subject	For	Id	Name	Period	
29-Sep-2017	Return was submitted	Street Vendor	353-000011792	TRADER MOE'S	30-Jun-2017	Delete
29-Sep-2017	Return was submitted	Specialized Sales	380-000011793	TRADER MOE'S	31-Aug-2017	Delete
17-Jul-2017	Third Party Request	Customer ID	00000-29248	TRADER MOE'S		Delete
14-Jul-2017	Request for Bulk Filing access	Customer ID	00000-29248	TRADER MOE'S		Delete
31-Aug-2016	Profile Updated	Customer ID	00000-29248	TRADER MOE'S		Delete
12-Jul-2016	Profile Updated	Customer ID	00000-29248	TRADER MOE'S		Delete

6 Rows

7. Once you click **View all Messages** from the **Correspondence** tab from your user profile, you will be directed to the **Messages** page.
 - a. The **Unread** tab will indicate the number of messages that have not been viewed within the system. The **Inbox** tab will show any messages OTR has sent to you and the **Outbox** tab will show any messages you sent to OTR.
 - b. To send OTR a new message click the **Send Message** button at the upper right-hand corner. To mark all the messages as “read” in the system click the **Mark All as Read** button.

The screenshot shows the TRADER MOE'S user interface. At the top, there is a navigation bar with a hamburger menu, the text 'TRADER MOE'S', and a 'Log Off' button. Below this is a breadcrumb trail: 'Home > TRADER MOE'S'. The main content area is divided into three sections: 'Settings', 'Alerts', and 'I Want To'. The 'Settings' section shows a user profile for 'bsndemo' with the account number '00000-29248' and a balance of '\$604.95'. The 'Alerts' section shows two alerts: 'Balance due: \$604.95' and '1 submission needs attention'. The 'I Want To' section lists several actions: 'View My Web Profile', 'Register a New Tax Account', 'Manage payments and returns', 'View FAQ's', and 'Send OTR a message'. Below these sections is a horizontal navigation bar with tabs: 'Accounts', 'Submissions', 'Correspondence', '8', 'Names and Addresses', 'Logons', and 'Exemptions'. The 'Names and Addresses' tab is selected and highlighted. Below the navigation bar, there is a section titled '8a Customer Names & Addresses'. This section displays the account number '00000-29248' and the address 'TRADER MOE'S, 520 FLORIDA AVE NW, WASHINGTON DC 20001-1851'. To the right of this address, there are four rows of information: 'Legal Name' (TRADER MOE'S), 'Trade Name' (Add), 'Primary Address' (520 FLORIDA AVE NW, WASHINGTON DC 20001-1851), and 'Mailing Address' (Add).

8. Click the **Names and Addresses** tab to view the address associated with your account(s) on file.
 - a. Under **Customer Names & Addresses** you can update your **Legal Name, Trade Name, Primary Address**, and/or **Mailing Address** by clicking the hyperlinks and submitting the request through the system.

Note: Certain requests such as **Legal Name** change require documentation outlined in [MyTax.DC.gov](https://www.mytax.dc.gov) before processing.

The screenshot shows the TRADER MOE'S user interface. At the top, there is a navigation bar with the TRADER MOE'S logo and a Log Off button. Below this is a breadcrumb trail: Home > TRADER MOE'S. The main content area is divided into three sections: Settings, Alerts, and I Want To. The Alerts section shows a balance due of \$604.95 and a notification that 1 submission needs attention. The I Want To section lists several actions: View My Web Profile, Register a New Tax Account, Manage payments and returns, View FAQ's, and Send OTR a message. Below these sections is a horizontal menu with tabs: Accounts, Submissions, Correspondence, Names and A, **9** Logons, and Exemptions. The Logons tab is highlighted with a red box and the number 9. Below the menu, there is a section titled Logons with Access to Customer, which contains the text "There are no logons" and a Manage button.

9. The **Logons** tab will show all web logons that have access to the customer/account (except your own).

The screenshot shows the TRADER MOE'S user interface. At the top, there is a navigation bar with the TRADER MOE'S logo and a Log Off button. Below this is a breadcrumb trail: Home > TRADER MOE'S. The main content area is divided into three sections: Settings, Alerts, and I Want To. The Alerts section shows a balance due of \$604.95 and a notification that 1 submission needs attention. The I Want To section lists several actions: View My Web Profile, Register a New Tax Account, Manage payments and returns, View FAQ's, and Send OTR a message. Below these sections is a horizontal menu with tabs: Accounts, Submissions, Correspondence, Names and Addresses, **10** Exemptions, and Exemptions 0. The Exemptions tab is highlighted with a red box and the number 10. Below the menu, there is a section titled Exemptions with a Filter button. Below this is a table with the following columns: Account ID, Exemption Type, Effective From, Effective To, and Status.

Account ID	Exemption Type	Effective From	Effective To	Status
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10. The **Exemptions** tab will show any exemptions that are currently on file.