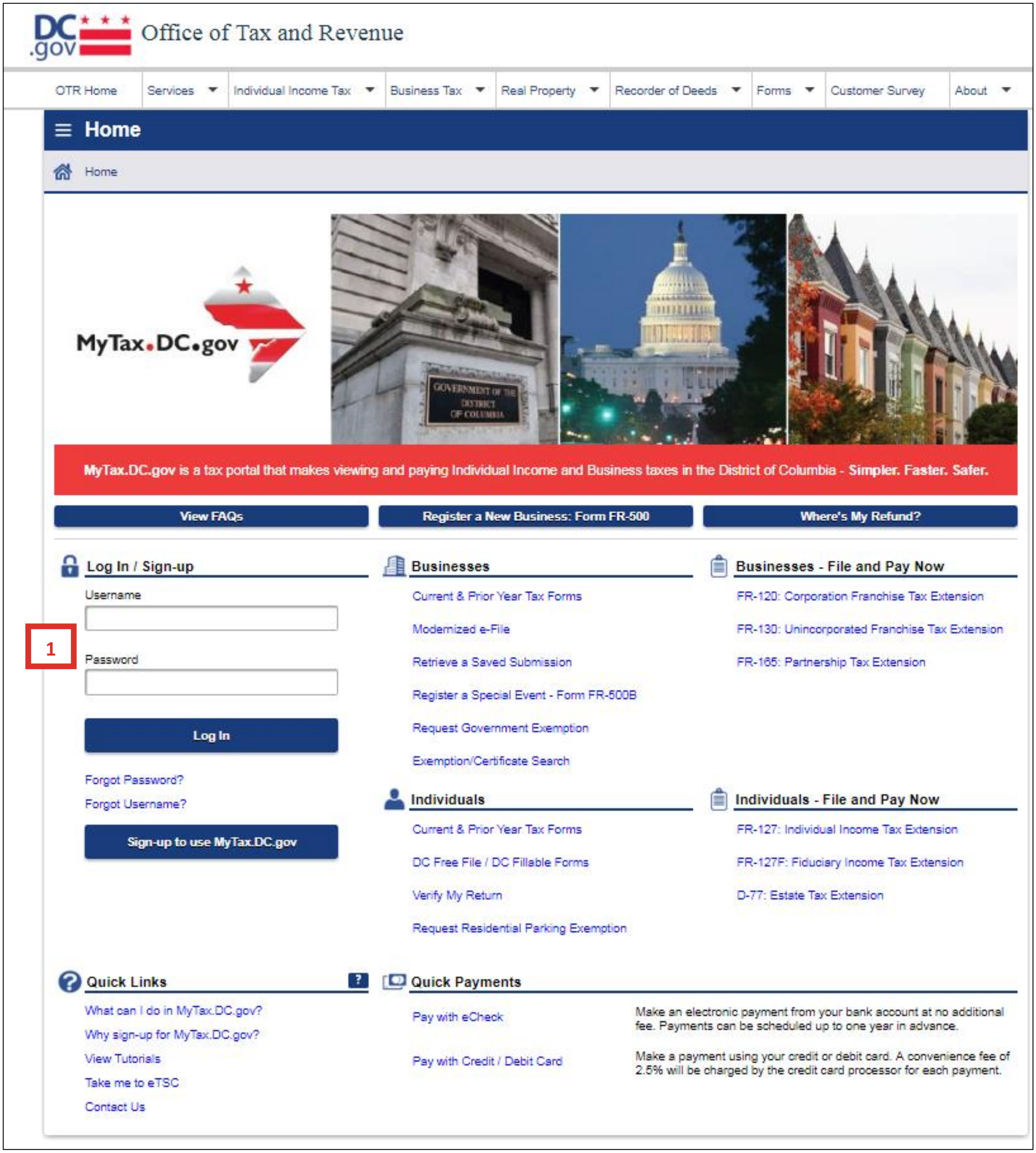
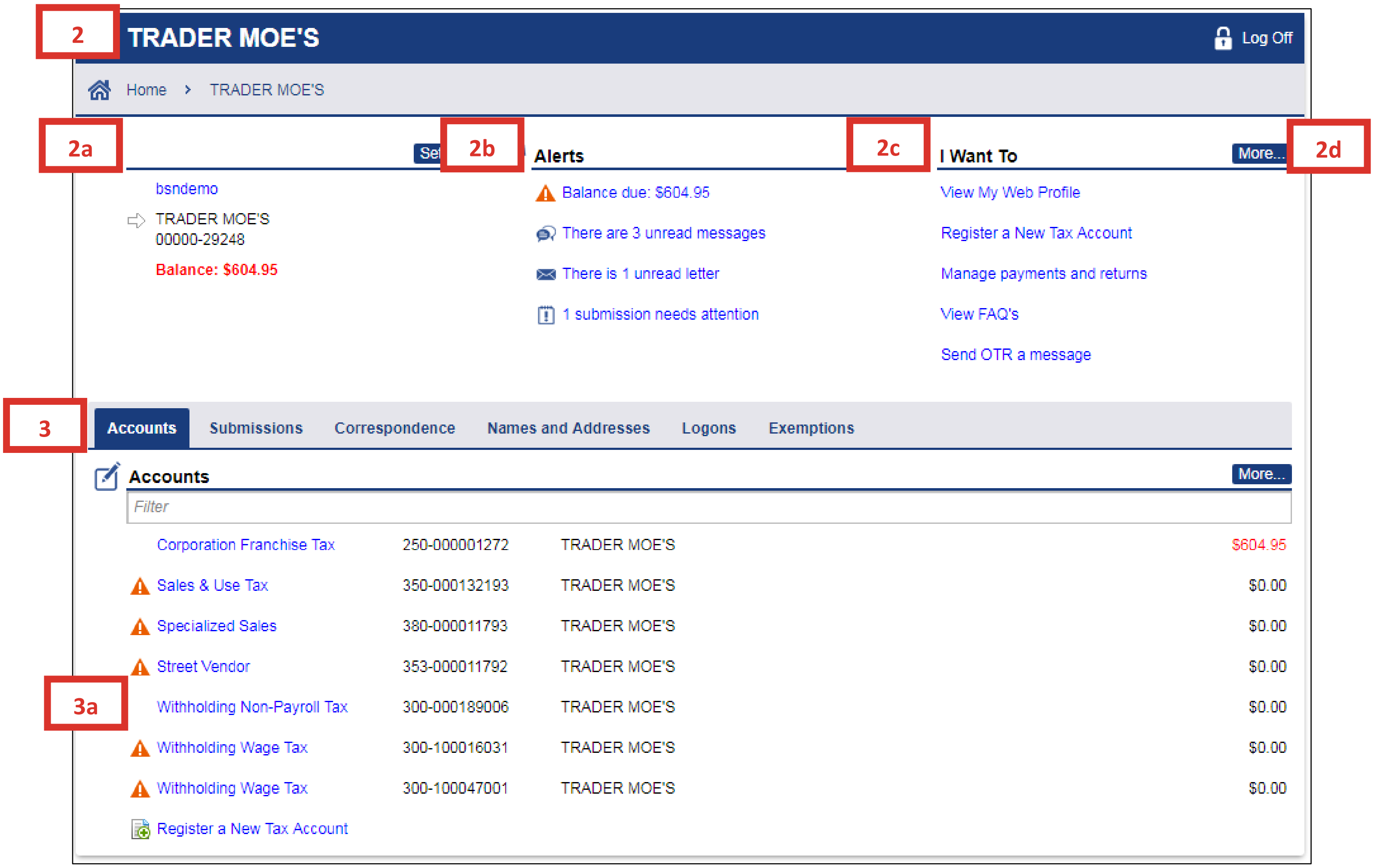
My Tax.DC.gov User Guide:
How to View Taxpayer and Account Details

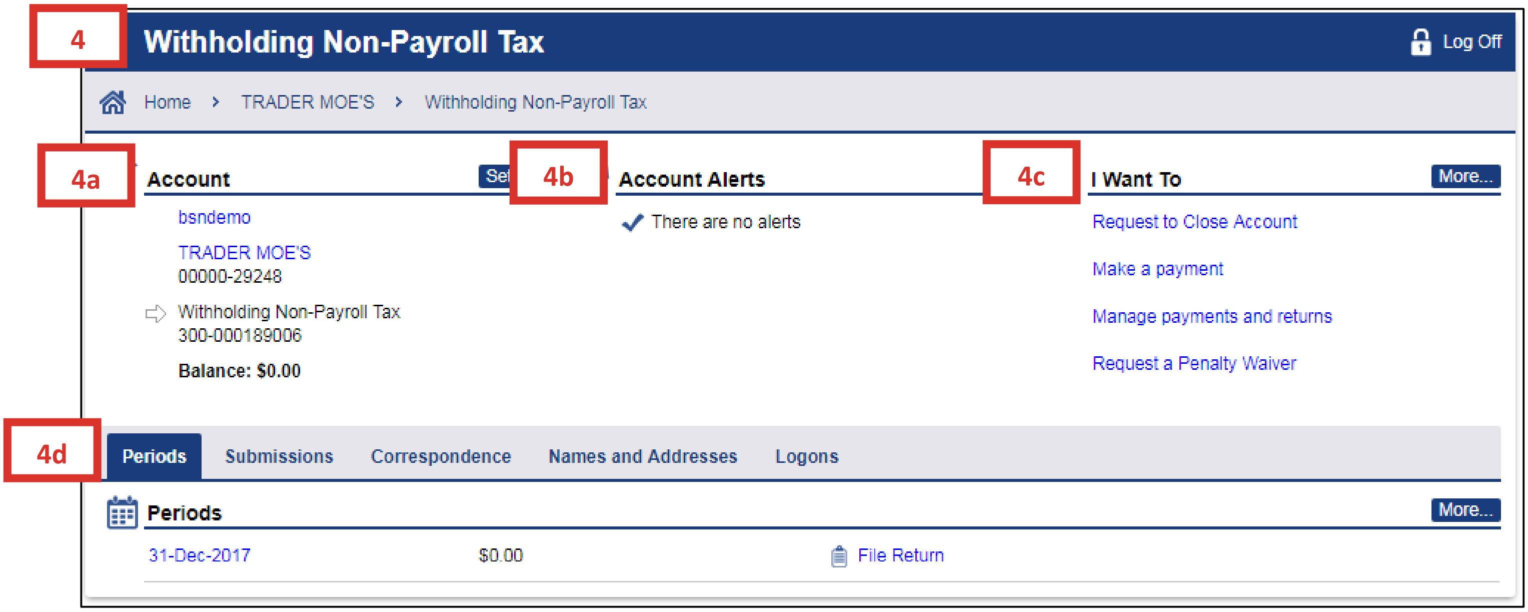


1. From the MyTax.DC.gov homepage, log in using your **Username** and **Password**.

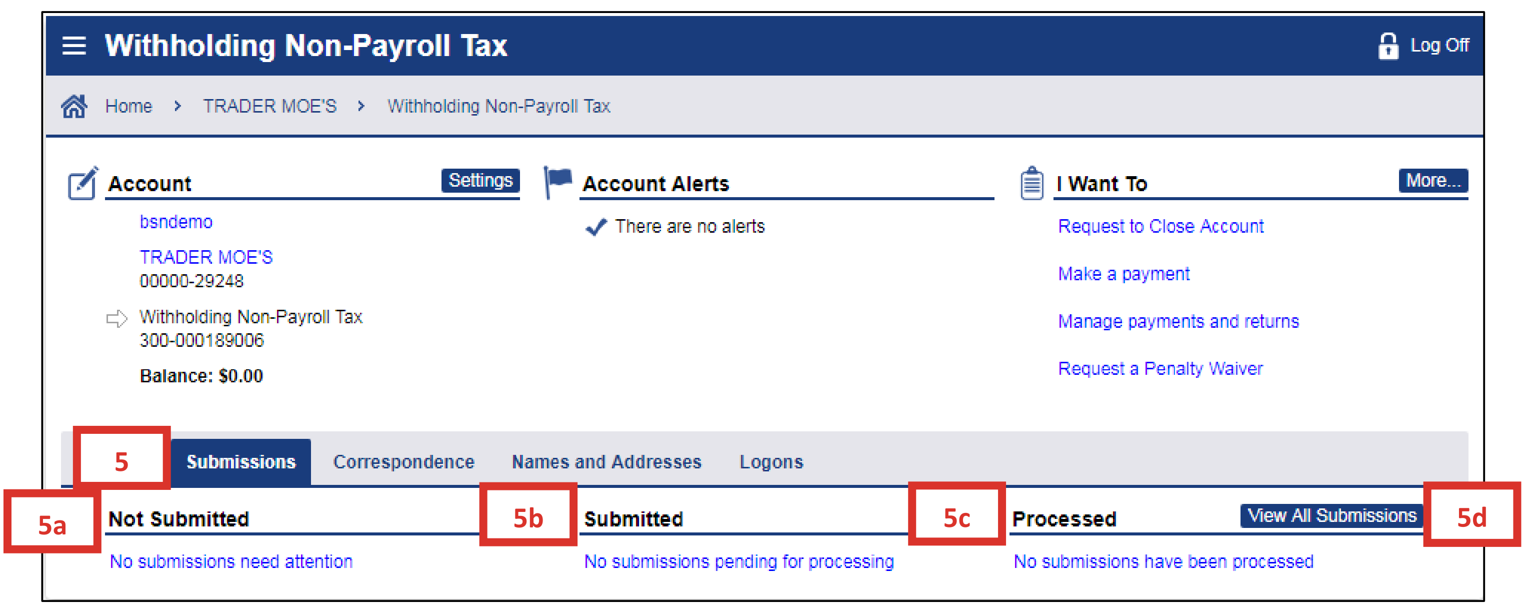


2. Upon logging in, you will be taken **Home**, which refers to your system profile.
    a. In the upper left corner, your customer identification number and business name are displayed.
    b. Under the **Alerts** section in the center of the page, you will find any alerts for this taxpayer which can 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**.

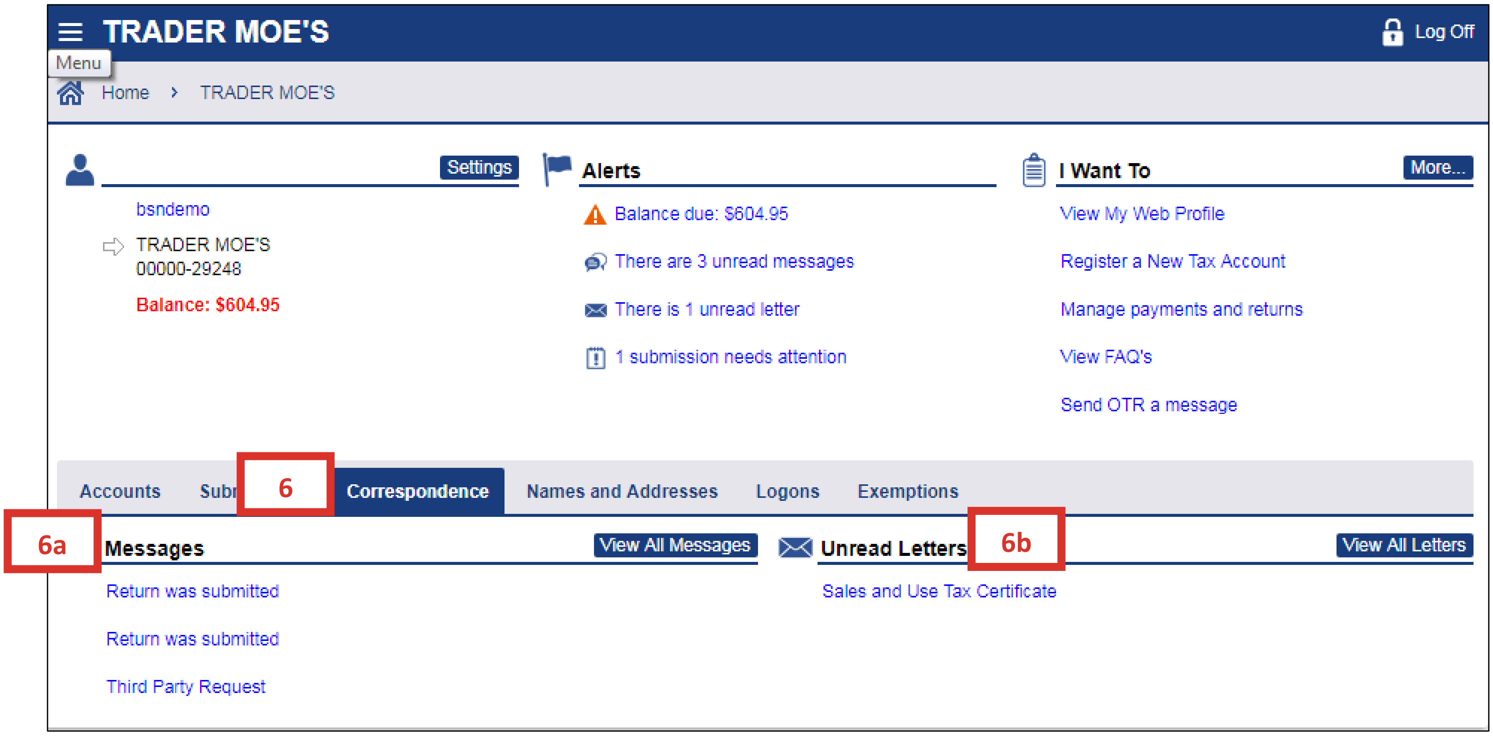


4. Since we selected a “Withholding Non-Payroll Tax” account, the Withholding Non-Payroll Tax account detail homepage displays.
    a. In the upper left corner of the page, you will see the account number and business name.
    b. Under the **Account Alerts** section in the center of the page, you will 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.

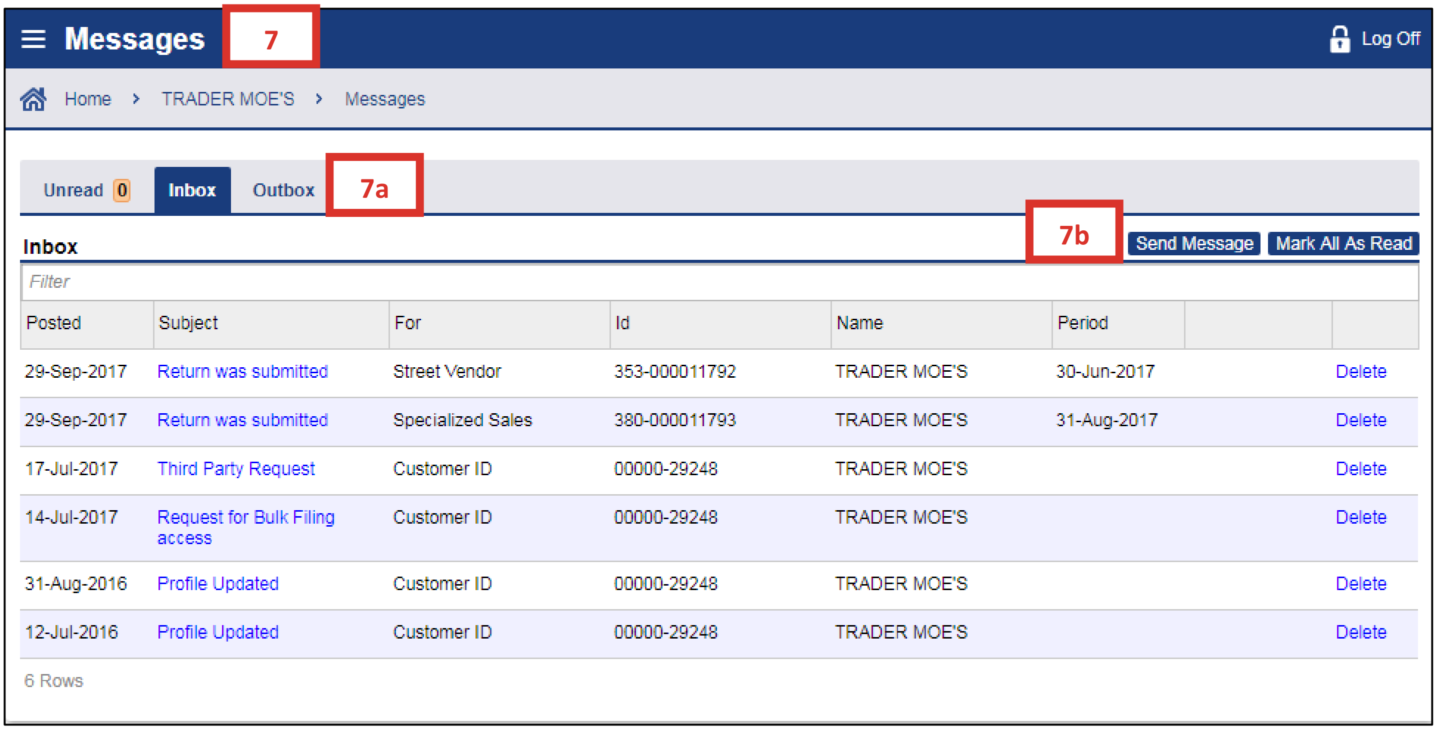


5. Click into the **Submissions** tab to view all your submissions or activities within your user profile (e.g. submitting a payment, filing a return, updating an address etc.).
    a. In the **Not Submitted** section, you can see submissions that need attention before processing.

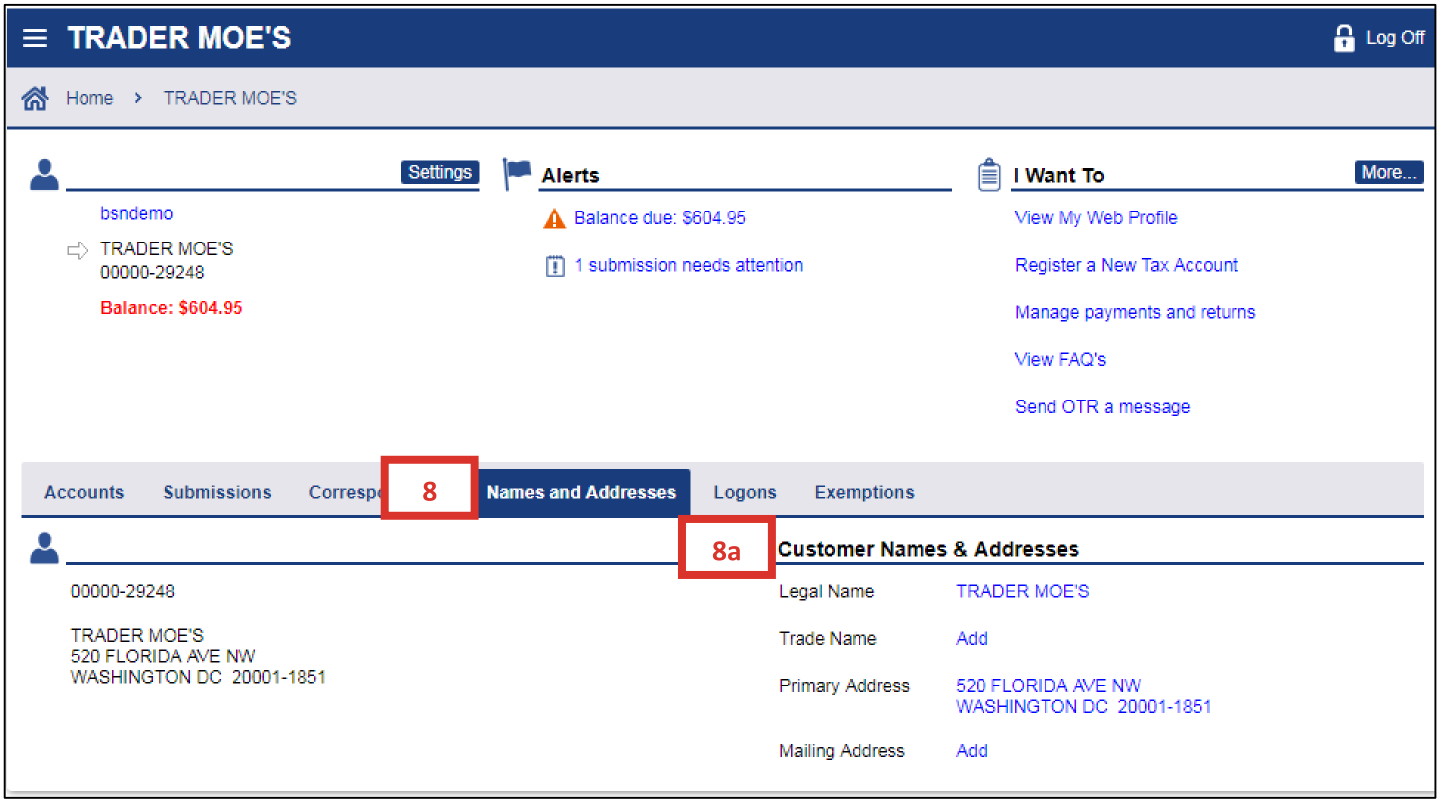
b. In the **Submitted** section, you can see all activities that you were submitted for processing.
c. In the **Processed** section, you can see all submissions that were processed through MyTax.DC.gov.
d. Click the **View All Submissions** tab to see a list of all your submissions. You can filter by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



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.

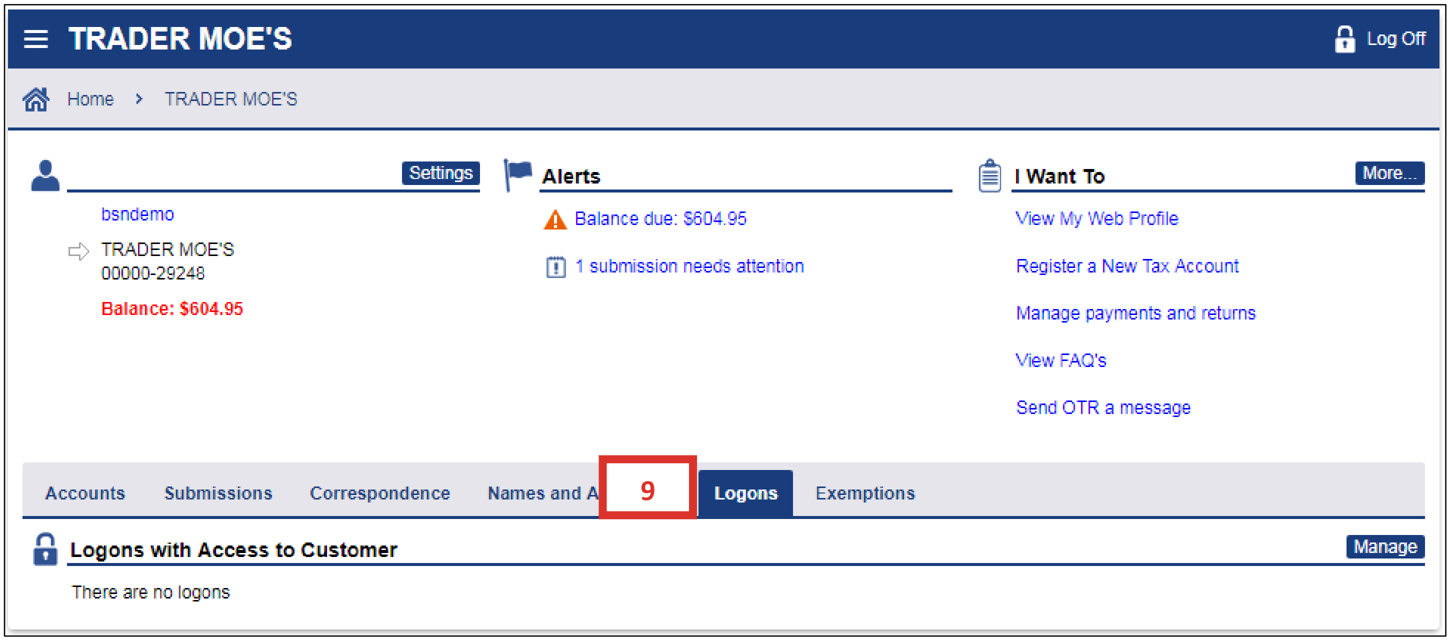


7. Once you click **View all Messages** from the **Correspondence** tab from your user profile, you will be directed to the **Messages** page.
   a. The **Unread** tab will indicate the number of messages that have not been viewed within the system. The **Inbox** tab will show any messages OTR has sent 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.

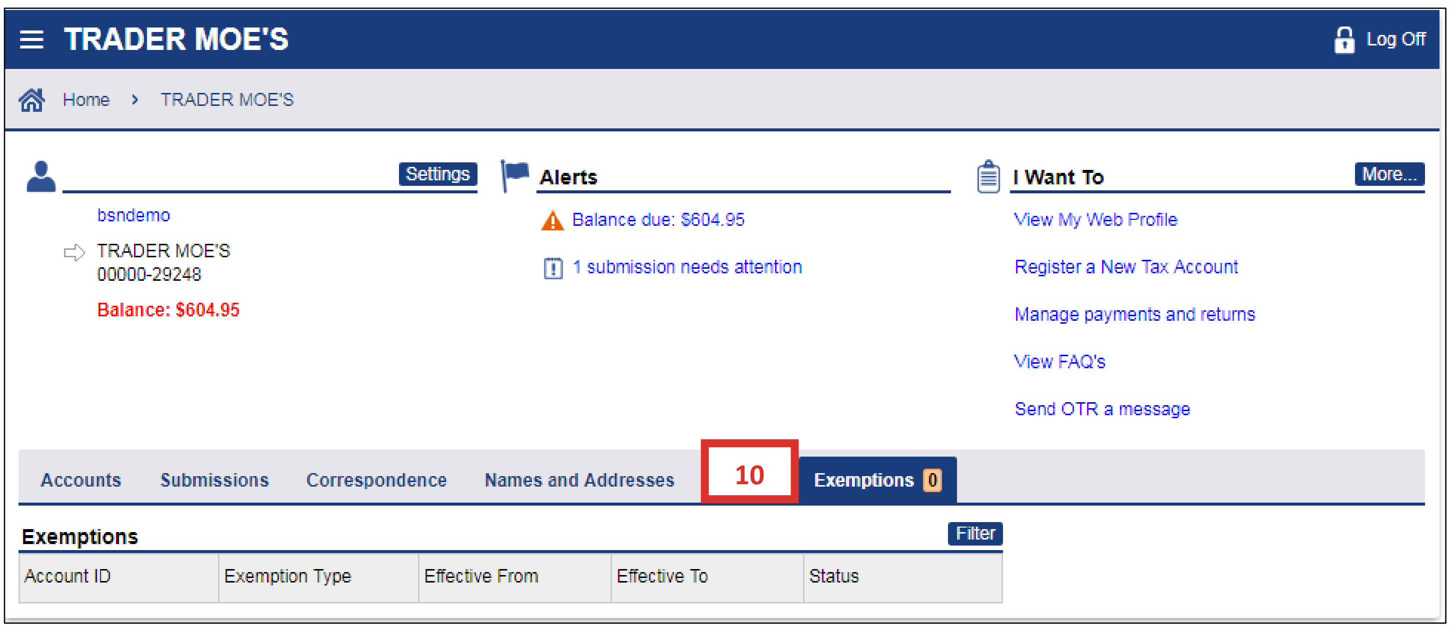


8. Click the **Names and Addresses** tab to view the address associated with your account(s) on file.
    a. Under **Customer Names & Addresses** you can update your **Legal Name**, **Trade Name**, **Primary Address**, and/or **Mailing Address** by clicking the hyperlinks and submitting the request through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

Note: Certain requests such as **Legal Name** change require documentation outlined in MyTax.DC.gov before processing.



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



10. The **Exemptions** tab will show any exemptions that are currently on file.