



UN INCOME TAX PORTAL

User Manual

*DM/OPPBA/OFFICE OF THE CONTROLLER/FIOS &
TAX UNIT*

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SUMMARY

Through the joint efforts of Accounts Division and Financial Information Operations Service (FIOS) of OPPBA, a web portal called ‘UN Income Tax Portal’ has been developed to allow UN system staff members who pay US taxes to enter their own Income Tax return data. The use of portal is

- intended to expedite the reimbursement process
- to give an opportunity for the UN systems staff members to view their reimbursement status online
- to facilitate Tax Unit to give more time to staff members to submit their tax claims (after the submission deadline of 1 March)

But please keep in mind that submission of data/information in the Tax Portal is not going to absolve the staff member of submitting paper copy of the signed tax return(s), along with the completed UN forms F.65, F.65/A and F.243 to the Income Tax Unit.

The purpose of this Manual is to give a synopsis and to guide the staff member in using the Tax Portal and entering the Tax data without any confusion or inconvenience.



I - Portal functionalities

In this chapter, the functionalities offered by the portal will be listed.

Portal User Registration

Before the taxpayer can use the Tax Portal, the taxpayer will have to first register by providing the following information:

- UN Index Number
- Last 4 digits of Social Security Number

The above fields are mandatory. The UN index Number and the last 4 digits of the SSN entered by the taxpayer will be verified before accepting the registration. To verify, the data will be compared with the taxpayer information that is already available with the Tax Unit.

Portal User Login

After the registration phase, the taxpayers could login using their UN index number and the password they have chosen earlier during the registration phase.

A successful login will start a 100-minute session. If there is no activity by the user after 100 minutes of inactivity, the user will be logged off and will be redirected to the login screen.

Please note that three unsuccessful attempts to Login will result in the user being locked out. If this occurs, the user has to send an email which should include an index number to taxportal@un.org requesting a password reset.

Portal User Data Submission

During a session, taxpayers will be able to submit information on their Federal income tax returns and on their state income tax returns. Because of certain limitations, taxpayers would be able to enter their information for the following states only:

- Connecticut
- Maryland
- New Jersey
- New York State
- Pennsylvania
- Virginia
- Washington D.C.



Taxpayers can enter information for only up to two states and one of them must be New York State.

Taxpayers do not have to submit the forms within one session. They can save their work and continue later on.

Taxpayers can work on only one form of each type. For example, one taxpayer can save one Federal form per tax year, one New York State form per tax year. However after the submission of one form, a taxpayer can later make an amendment and submit again the same type of form for the same year.

Reimbursement Status

On the portal, taxpayers can review their reimbursement status after submission. The status gives information about the reimbursement entered online. The status of the reimbursement process will be shown as follows:

Your tax data entry was saved but not yet sent. Please submit when ready.

Your tax data was received. Please submit UN forms and paper copies of tax returns to the Tax Unit.

Your tax data, UN forms and paper copies of tax returns were received by the Tax Unit and are awaiting review.

Your settlement request was rejected. Please wait for email or letter from Tax Unit for additional information.

Your settlement request is being reviewed.

Your settlement request was approved. Please wait for further information from Tax Unit.

After the data is submitted by the taxpayer online and after the required forms, copies of returns and portal receipt are submitted to the Income Tax Unit, the Income Tax Unit will process your reimbursement.



How to use the portal?

I.1. Principle

Once you have registered, enter your income tax return data. From the home page, click on "Request", choose a year and then click on "Federal". Enter your federal data then save it before exiting.

If you also have returns for the states of Connecticut, Pennsylvania, Maryland, New Jersey, New York, Virginia or for Washington D.C., then enter the necessary data online. From the home page, click on "Request", choose a year, then choose one of the states or Washington D.C. and click on "State". Enter your data and save it before exiting.

Once you have entered all your federal and state returns data, submit it. From the home page, click on "Request", choose a year and then click on "Submit".

After that, you can check your reimbursement status. From the home page, click on "Status", then choose a year.

I.2. Example

The following example explains how to use the portal from the registration of a new user to the checking of the reimbursement status. For this example, the taxpayer is single and lives in the state of New York.

I.2.1. Register as a New User

Before being able to log in, the taxpayer must register. The user must click on the link "Register as a new user" from the Login page.

here)', '[Register as a new user](#)', and '[Forgot your password?](#)'."/>

https://taxportal.dev.un.org/Login.aspx

File Edit View Favorites Tools Help

 **UN INCOME TAX PORTAL**

Please user your UN index number as your User ID.

User ID:

Password:

Log in

If you had registered in 2015 or before, please register again as all login information has been removed. For registering please click "Register as a new user" first.

(Tax Portal Manual Available [here](#))

[Register as a new user](#)
[Forgot your password?](#)

Login Page

The registration process is in two steps. The first step is to validate the User's index number and the Social Security Number.



UN INCOME TAX PORTAL

Register as a New User

Please provide the following information:

UN Index Number:*

Last 4 digits of your SSN:*

**Required fields*

Only when the information above is verified will the user will be able to continue with this registration.

If you have problems registering, please contact the Tax Unit at taxportal@un.org.

Your UN index number will be your user ID for this website.

Continue

Cancel

Registration Page 1

The UN Index Number may or may not have leading zeros. However, the last 4 digits of the Social Security Number must be entered, even with leading zero(s).

Once the user enters the correct information, the user will be allowed to continue to enter additional information in the second step of the registration.



UN INCOME TAX PORTAL

Register as a New User

Please provide the following information:

Password:*
(at least 6 characters)

Confirm your password:*

**Required fields*

After successful completion, you will be redirected to the login page and you will be able to login with the information you provided.

Registration Page 2

Password must contain: Minimum 8 characters, at least 1 Upper Case Alphabet, 1 Lower Case Alphabet, 1 Number and 1 Special Character (~!@#%&).

Some valid examples are: 12345Aa@ 12345678Aa@ 12345678Aa" 12345678Aa[

1.2.2. Forgot your Password (Deregister)

In case the taxpayer forgets his password, the user can cancel the earlier registration and re-register. Click on the "Forgot your password?" link on the Login page.



Deregistration page

The user has to enter their UN index number and the last 4 digits of their SSN then click the **Deregister** button. After verifying the information given, the system will cancel their previous registration and redirects them to the Login page to allow the user register again.

1.2.3. Login

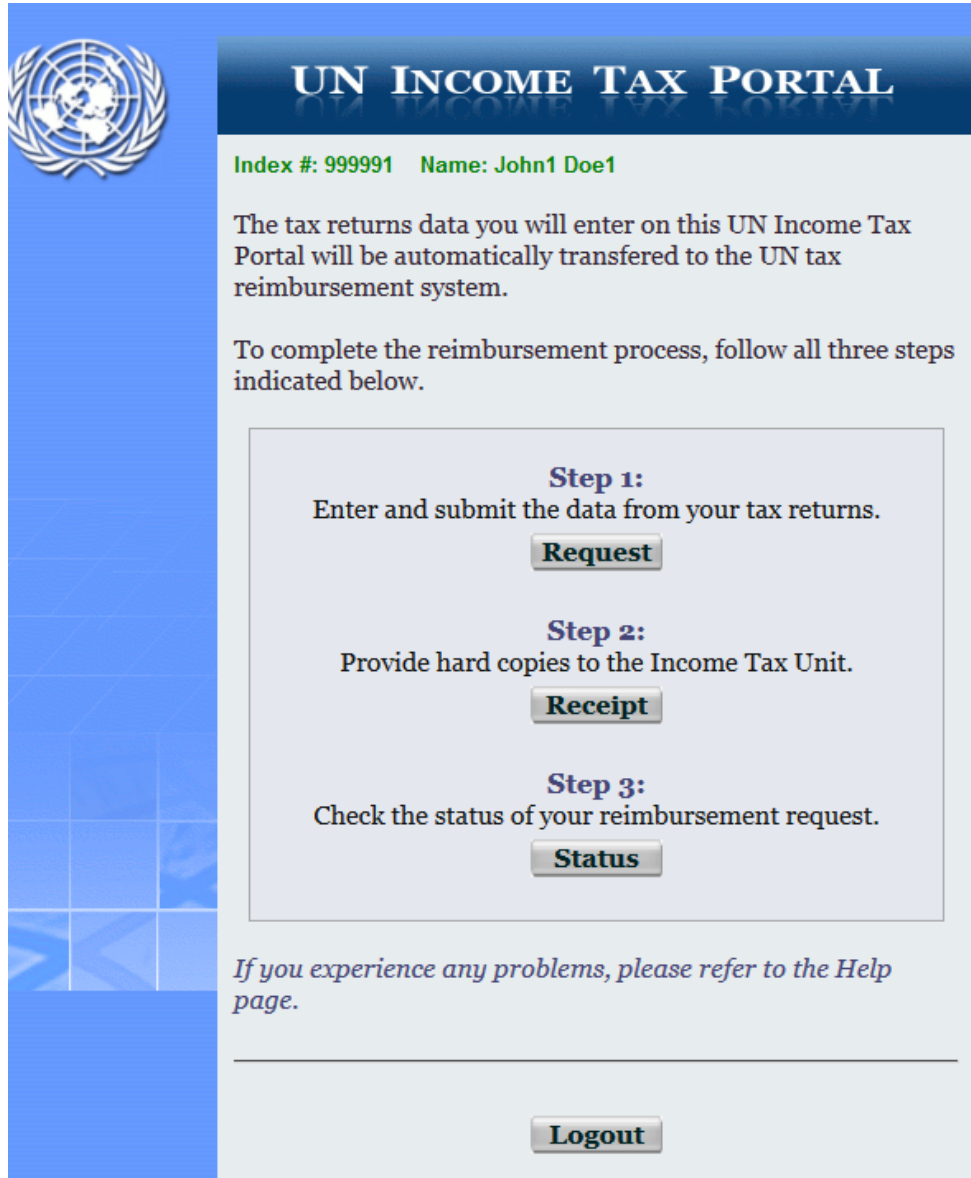
After successfully registering, the user must log in to the portal

The User ID is the taxpayer's UN index number (with or without leading zeros).

If there are more than 3 unsuccessful logins, the user's access will be disabled and user should contact 'taxportal@un.org' to reactivate their account.

1.2.4. Home Page

After successfully logging in, the user will be directed to the Tax Portal Home page.



The screenshot shows the 'UN INCOME TAX PORTAL' home page. It features the UN logo on the left. The main content area displays the user's index number (999991) and name (John1 Doe1). A message states that tax return data entered on the portal will be transferred to the UN tax reimbursement system. It then lists three steps for the reimbursement process: Step 1 (Request), Step 2 (Receipt), and Step 3 (Status). A 'Logout' button is located at the bottom of the page.

UN INCOME TAX PORTAL

Index #: 999991 Name: John1 Doe1

The tax returns data you will enter on this UN Income Tax Portal will be automatically transferred to the UN tax reimbursement system.

To complete the reimbursement process, follow all three steps indicated below.

Step 1:
Enter and submit the data from your tax returns.
Request

Step 2:
Provide hard copies to the Income Tax Unit.
Receipt

Step 3:
Check the status of your reimbursement request.
Status

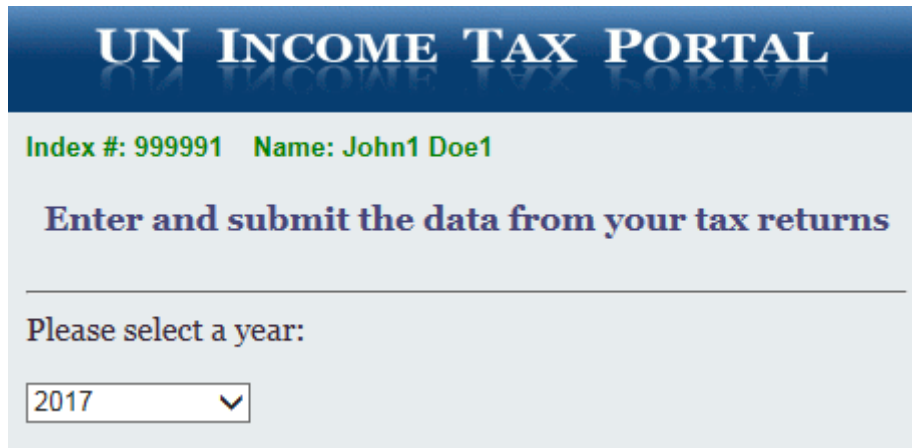
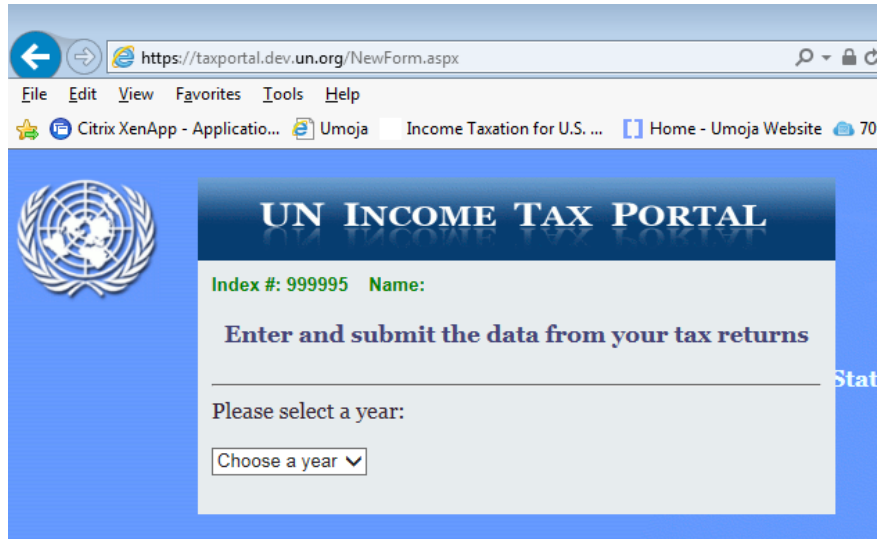
If you experience any problems, please refer to the Help page.

Logout

Home Page

1.2.5. Request Page

To enter data for their return, the user must click on the [Request] button.



Request Page

Once the tax year is chosen using the dropdown list, rest of the page is shown.



Request Page

1.2.6. Enter Federal Return Data

To enter the data for the federal return, the taxpayer clicks on the [Federal] button.

UN INCOME TAX PORTAL

Index #: 999991 Name: John1 Doe1

Enter and submit the data from your tax returns

Please select a year:

2017 ▼

Federal Form:

You have already **started** entering your **Federal** return data.

Federal

State Form:

You have already **started** entering your **New York** return data.

New York State ▼

State



UN INCOME TAX PORTAL

Index #: 999991 Name: John1 Doe1
2017 Federal Tax Return (1 of 2)

Did you work for other UN agencies that are **NOT** in the list?
(See the list) Yes No

Do you have a Form 2555 (Foreign Earned Income)?
To see what the form looks like:
[Click here](#) Yes No

Did your spouse work in one or more of the following agencies or entities?
(See the list) Yes No

Did your spouse work for other UN agencies that are **NOT** in the list? **(See the list)** Yes No

Does your Spouse have Form 2555? Yes No

Do you have Form 6251 (AMT): Yes No

First Federal Page

At any time, the taxpayer can save their data using the [Save] button.

The taxpayer is able to navigate through the different pages of the federal form using the [<< Prev] and [Next >>] buttons.



Schedule A (Form1040), Line 19	<input type="text"/>
Schedule A (Form1040), Line 20	<input type="text"/>
Schedule A (Form1040), Line 27	<input type="text"/>
Schedule A (Form1040), Line 28	<input type="text"/>
Form4952, Line 4e	<input type="text"/>
Form4952, Line 4g	<input type="text"/>

Last Federal Page

Once satisfied with the data entered, the taxpayer must click on the [Save] button.

Note that clicking the [Exit] button does not save the data entered.

1.2.7. Enter State Return(s) Data

Now the taxpayer wants to enter New York State data. From the Request page, select “New York State” from the dropdown list of states. Then, the user must click on the [State] button.

State Form:
New York State <input type="button" value="v"/>
<input type="button" value=" State"/>

Request Page



UN INCOME TAX PORTAL

Index #: 999991 Name: John1 Doe1

2017 New York State Tax Return

Check the case which describe the best your New York status:

- New York City Resident
- Yonkers Resident
- Part-Year State Resident and Part-Year City Resident
- New York State Resident outside of New York City and Yonkers
- Non-Resident (State) or Part-Year State Resident outside of New York City and Yonkers

Filing status on Form IT-203

- Single
- Married filing joint return
- Married filing separate return
- Qualifying widow(er) with dependent child
- Head of household

To see what the form looks like: [Click here](#)

New York State Page

After entering the data, the taxpayer must click on the [Save] button

1.2.8. Submit Data

Once the data entered and saved, the taxpayer has to submit them by clicking on the [Submit] button on the Request page.



Submit data:

The following tax returns are submitted:

Federal

New York State

EMAIL SENT TO tax@un.org FROM TAX-
DoNotReply@un.org.

Submit

Request Page

Data is transmitted to the Income Tax Unit.

User will also receive an automatic email from the Tax Portal system (to the registered email address) saying that the data have been received and staff member needs to submit the copy of the full signed tax claim including all schedules and UN forms to the UN Income Tax Unit separately.

1.2.9. Print the Receipt

Once you have submitted your data through the portal, the receipt from the Tax Portal can be printed and saved for your records.

From the Home page, click on the [Receipt] button.

Step 2:
Provide hard copies to the Income Tax Unit.

Receipt

The following page will display the status of your submission.



UN INCOME TAX PORTAL

Index #: 999991 Name: John1 Doe1

Receipt

Please select a year:
 ▼

Reimbursement Status: Your tax data was submitted and is waiting to be received by the Tax Unit.

The following returns were completed online:

Tax Year	Form	Processed
2017	Federal	09 Feb 2018 10:23
2017	New York	09 Feb 2018 10:23

Please print this page as your receipt and **submit it with the required forms and copies of returns to the Tax Unit.**

[Home](#)

Receipt Page

Print this page using your web browser’s print function.

1.2.10. Check Status

Once the data submitted, it is possible to check the reimbursement status of the taxpayer. From the Home page, the taxpayer clicks on [Status] button or “Status” on the menu.

Step 3:
Check the status of your reimbursement request.

[Status](#)

Home Page

After selecting the tax year from the dropdown list, the reimbursement status will be displayed.

The screenshot shows a web interface for the 'UN INCOME TAX PORTAL'. At the top, the user's index number '999991' and name 'John1 Doe1' are displayed. The main heading is 'Check the status of your reimbursement request'. Below this, a message states: 'If you have already submitted your forms online, you can check your reimbursement status. Please select a year:'. A dropdown menu is shown with '2017' selected. A central box contains the status: 'The Status of your Reimbursement process is: Your tax data was submitted and is waiting to be received by the Tax Unit.' At the bottom of the page is a 'Home' button.

UN INCOME TAX PORTAL

Index #: 999991 Name: John1 Doe1

Check the status of your reimbursement request

If you have already submitted your forms online, you can check your reimbursement status.

Please select a year:

2017 ▼

The Status of your Reimbursement process is:

Your tax data was submitted and is waiting to be received by the Tax Unit.

Home

Status Page



II - Conclusion

For more information, comments or problems with the UN Income Tax portal, please write to the email address 'taxportal@un.org'. Also, for further general information about UN Income Tax, you may visit the Tax website at <http://www.un.org/tax>.