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# UN INCOME TAX PORTAL

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## USER Manual

JANUARY 2022

DOS/DOA/HQCSS/INCOME TAX UNIT

## Summary

Through the joint efforts of Accounts Division and the UN Income Tax Unit, a web portal called 'UN Income Tax Portal' was 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 system staff members to view their reimbursement status online
- to enable the Tax Unit to give more time to staff members to submit their tax claims (after the submission deadline of 1st March)

Please note that submission of data/information in the Tax Portal is not going to absolve the staff member of uploading scanned copies 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 staff member must upload all necessary copies to the Tax Portal.

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.

# 1 Portal functionalities

In this chapter we explore the functionalities of the portal.

## 1.1 User Registration

The portal is designed to allow the user to login using their Unite credentials on Azure Active Directory i.e., using their UN email address and Unite password; just like on several other UN platforms.

The UN Income Tax Unit will register every taxpayer to enable them to use the Tax portal beforehand.

**Note:** If you need any support to activate your Unite account or to activate MFA, please send an email to [taxportal@un.org](mailto:taxportal@un.org); the email should include your index number and a description of the support you need.

## 1.2 User Login

Once the user successfully logs onto the portal using their Unite Identify, the user will be prompted to provide their UN Index Number and the last 4 digits of their Social Security number (SSN). This is to the second level of authentication to ensure the user's information security. The above fields are mandatory.

The portal will verify the index number and the last 4 digits of the SSN entered by comparing it against the taxpayer information already available to the Tax Unit before accepting the logon and retrieving the taxpayer's information.

A successful login will start a 30-minute session. If the portal records inactivity from the user for 30 minutes, the user will be logged off automatically.

**Note:** If the user enters an incorrect SSN for the provided index number, the user account will be **disabled**. If this occurs, the user must send an email to [taxportal@un.org](mailto:taxportal@un.org) requesting a password reset; the email should include their UN index number and description of the request.

**Note:** If you have any other challenges logging on to the portal, please contact [taxportal@un.org](mailto:taxportal@un.org) and any issues will be rectified.

## 1.3 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 will only be able to enter their information for the following states:

- i. Connecticut
- ii. Maryland
- iii. New Jersey
- iv. New York State
- v. Pennsylvania
- vi. Virginia
- vii. Washington D.C.

A taxpayer can only enter information for up to 2 states and one of them must be New York State.

Additionally, a Taxpayers does not have to submit the forms within one session. They can save their work and continue later.

A taxpayer can work on only one form of each type per tax year. 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 the data, a taxpayer can later make amendments to the form and resubmit for the same type of form for the same year.

## 1.4 Reimbursement Status

On the portal, a taxpayer can review their reimbursement status after submission. The status gives information about the reimbursement entered online. The portal will show one of the following reimbursement process status:

- i. Your tax data entry was saved but not yet sent. Please submit when ready.
- ii. Your tax data was received. Please submit your UN forms and copies of tax returns to the Tax Unit.
- iii. Your tax data, UN forms and copies of tax returns were received by the Tax Unit and are awaiting review.
- iv. Your settlement request was rejected. Please wait for email or letter from Tax Unit for additional information.
- v. Your settlement request is being reviewed.
- vi. 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 are submitted to the Income Tax Unit, the Income Tax Unit will process your reimbursement.

## 2 How to use the portal

In this chapter we explore the steps the user should follow to submit their information.

### 2.1 Principle

Once you have logged in, you can enter your income tax return data.

- From the Home page, click the [Request] button, choose a year, and then click the [Federal] button. Enter your federal data then save it before exiting.

If you also have any 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 the [Request] button, then choose a year, then choose one of the states or Washington D.C. and click on the [State] button. Enter your data and save it before exiting.

Once you have entered all your federal and state returns data, submit the data.

- From the Home page, click on [Request] button, choose a year, and then click on the [Submit] button.

After data submission, you can check your reimbursement status at any time.

- From the Home page, click on "Status", then choose a year.

### 2.2 Example

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

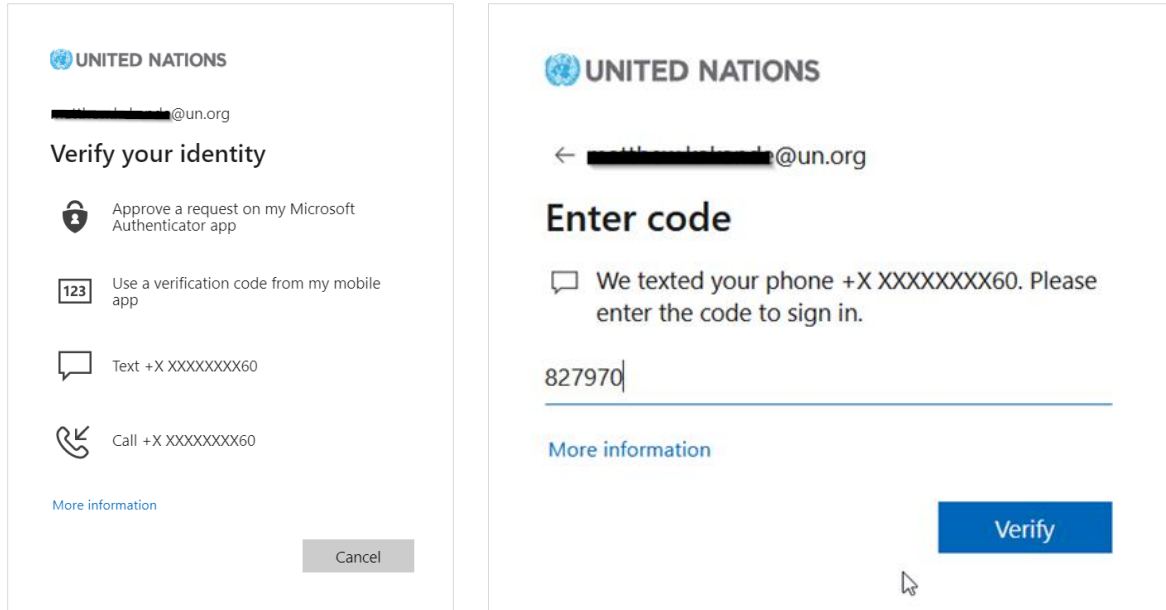
#### 2.2.1 Logging in

When the user accesses the tax portal, the user will be prompted to sign in with their email address.

The image displays two screenshots of the UN Income Tax Portal login interface. The left screenshot shows the 'Sign in' page with the United Nations logo at the top. Below the logo, the text 'Sign in' is displayed. A text input field contains the email address 'someone@example.com'. Below the input field, there is a link that says 'Can't access your account?'. At the bottom right of the page, there is a blue button labeled 'Next'. The right screenshot shows the 'Sign in' page with the United Nations logo at the top. Below the logo, the text 'Sign in' is displayed. There are two input fields: the first is for the email address, containing a redacted email address ending in '@un.org', and the second is for the password, containing a series of dots. Below the input fields, there is a blue button labeled 'Sign in'. At the bottom of the page, there is text that says 'Sign in with your @un.org email address and Unite Identity password'. Below this text, there is a link that says 'Forgot your password?' and another link that says 'Reset your Unite Identity password online'.

The user should enter their UN email address and click “Next”. The user will then be redirected to the Unite Login page where they will sign in using their UN email address and Unite Identity password.

Multi-factor authentication (MFA) is enabled on the Tax Portal therefore, the user will be prompted to approve their logging in by providing a code sent to either their phone by text or call; or by using the Microsoft Authenticator app installed on their phone. The user will choose which option to use.



After successfully logging onto the portal using Unite Identity, the user will then be required to provide their UN index number and the last 4 digits of their SSN then click the [Retrieve] button. If the information is correct, the portal will retrieve the taxpayer’s information basing on the provided user credentials.



**Note:** If the user enters an incorrect SSN for the provided index number, the user account will be **disabled**. If this occurs, the user must send an email to [taxportal@un.org](mailto:taxportal@un.org) requesting a password reset; the email should include their UN index number and description of the request.

## 2.2.2 Home Page

After logging in and retrieving the user's information, the user will be redirected to the Tax Portal Home page. From the Home page, the user is able to launch 3 major steps, namely: - request to submit tax returns, print receipt information submitted returns and check the status of the reimbursement request. Each of these is briefly discussed below.

Additionally, the user will see a visible main menu from every page of the portal. The user can use this to access several functionalities of the portal including logging out. Each will also be discussed in the coming pages.

**UN INCOME TAX PORTAL**

**Index #: 365609 Name: Matthew Kakande**

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:**  
Upload Documents to the Income Tax Unit.  
**Upload**

**Step 3:**  
Print out Receipt  
**Receipt**

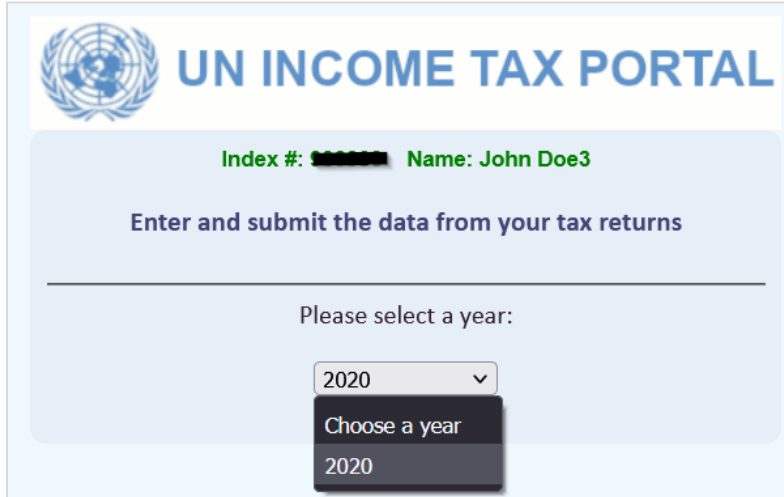
**Step 4:**  
Check the status of your reimbursement request.  
**Status**

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

**Home**  
**Request**  
**Status**  
**Upload**  
**Help**  
**Download**  
**SignOut**

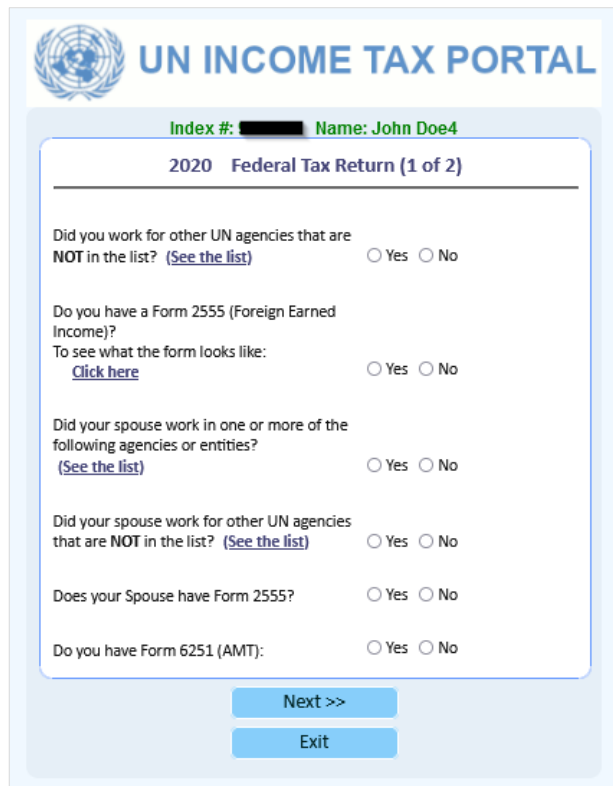
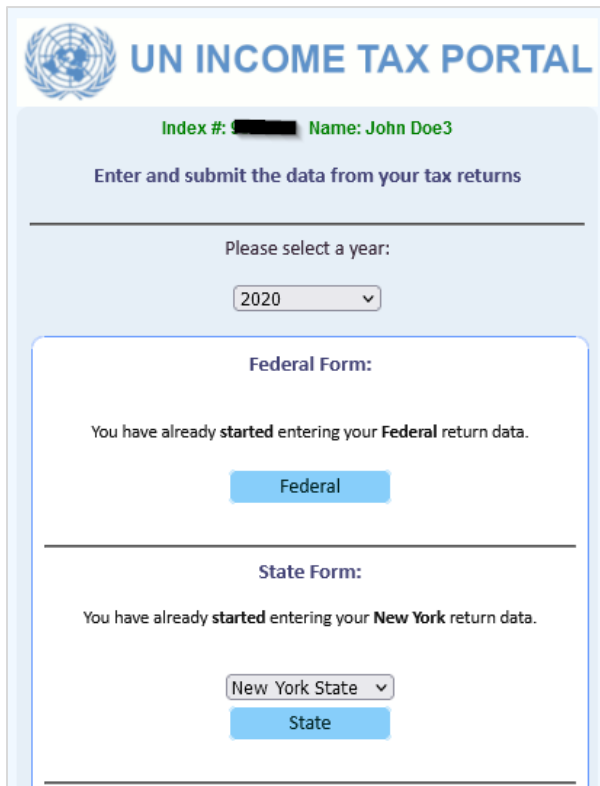
### 2.2.3 Request Page

To enter data for their return, the user must click on the [Request] button; this will open the Request page. On this page, the user should select the tax year for which they want to submit data using the dropdown list; once this is done, rest of the page is shown.



### 2.2.4 Enter Federal Return Data

To enter the data for the federal return, the user should click on the [Federal] button. This will open the 'Federal Tax Return' form.





The user can navigate through the different pages of the federal form using the [ << Prev ] and [ Next >> ] buttons.

The screenshot displays the UN Income Tax Portal interface. The top left features the UN logo and the text "UN INCOME TAX PORTAL". Below this, the user's "Index #: 000000" and "Name: John Doe4" are shown. The main heading is "2020 Federal Tax Return (2 of 2)".

The left panel contains several input fields with labels and instructions:

- "UN earnings from one or more of the following agencies or entities (See the list)" with an input box.
- "UN Income Subject to SE Tax: If you are a full year resident, use the total UN income from your statement of taxable earnings form. If you are a part-year resident, prorate it. To see what the form looks like: Click here" with an input box.
- "UN earning from other agencies:" with an input box.
- "Please enter your spouse UN index number:" with an input box.
- "Please enter here the total of your spouse UN earnings for all agencies:" with an input box.
- "Please enter here your spouse UN Income Subject to SE Tax:" with an input box.
- "Please enter here your spouse income from other organization:" with an input box.

The right panel is titled "If you have a Schedule A (Itemized Deductions) for the Form 1040, fill in the fields below. The line number on the Schedule A is indicated on each row." It lists various line items with corresponding input boxes:

- Schedule A (Form1040), Line 4
- Schedule A (Form1040), Line 7
- Schedule A (Form1040), Line 9
- Schedule A (Form1040), Line 10
- Schedule A (Form1040), Line 11
- Schedule A (Form1040), Line 14
- Schedule A (Form1040), Line 15
- Schedule A (Form1040), Line 16
- Form4952, Line 4e
- Form4952, Line 4g

At the bottom of the right panel, there are three blue buttons: "<< Prev", "Save", and "Exit".

At any time while filling the form, the user can save their data using the [Save] button. Once satisfied with the data entered, the user **must** click on the [Save] button to save the data.

**Important Note:** Exiting the page without clicking the save button will lead to **loss** of the data the user has just entered.

## 2.2.5 Enter State Return(s) Data

If the user wants to enter New York State data, the user should return to the Request page and select 'New York State' from the dropdown list of states. Then, the user must click on the [State] button. This will open the 'New York State Tax Return' form.

The screenshot shows a "State Form:" section. It features a dropdown menu with "New York State" selected and a blue "State" button below it.

**UN INCOME TAX PORTAL**

Index #: 000001 Name: John Doe4

**2020 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

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

Fill in the fields below.  
The form and line numbers are indicated on each row.

Save

Exit

After entering the data, the user must click on the [Save] button to save the data.

**Important Note:** Exiting the page without clicking the save button will lead to **loss** of the data the user has just entered.

## 2.2.6 Submit Data

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

**Submit data:**

The following tax returns data are ready to be submitted.

**Federal**

Submit

**Submit data:**

The following tax returns are submitted:

**Federal**

EMAIL SENT TO [redacted]@un.org FROM TAX-DoNotReply@un.org.

Submit

The data will be transmitted to the Income Tax Unit and an automatic email notification will be sent to both the Tax Unit and the user's registered email address saying that the data have been


received and staff member needs to submit a copy of the full signed tax claim including all schedules and UN forms to the UN Income Tax Unit separately.

## 2.2.7 Upload Documents

After submitting the data, the user can submit all the supporting documents using the upload feature on the portal.

From the Main Menu, the user should click on the 'Upload' link. The Upload Documents page will open.

**Note:** The user should carefully read the instructions on this page to understand what to do and how the portal will treat the files.

 **UN INCOME TAX PORTAL**

**Index #:** [REDACTED] **Name:** John Doe4

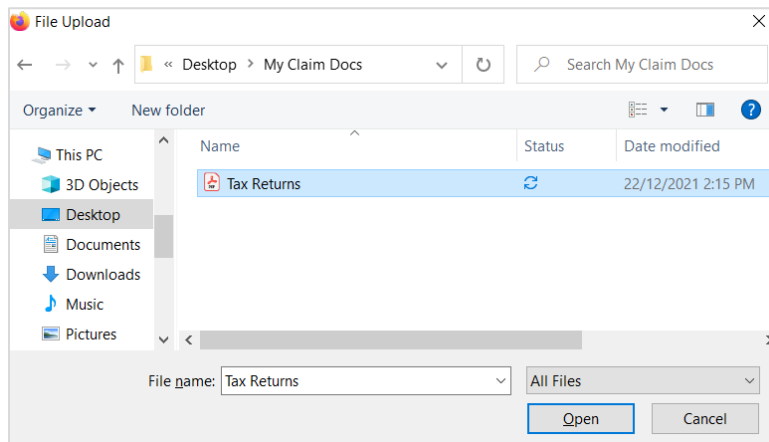
**INSTRUCTIONS:**

1. Please upload only relevant PDF documents related to your Tax claims.
2. Each file can contain one or more relevant documents required.
3. You can only upload 1 file at a time.
4. Each file must be less than than 10MB.
5. If you upload a file with the same name as a previously uploaded file, **the Portal will consider it as an amendment of the original file.** The tax unit will consider only the latest version to process your claim

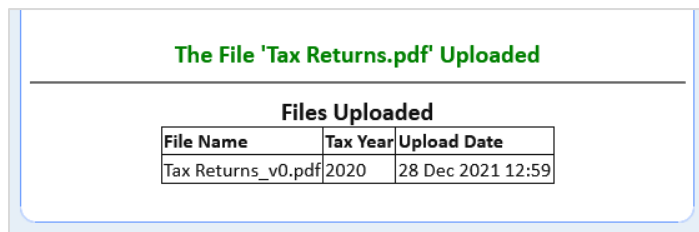
No file selected.

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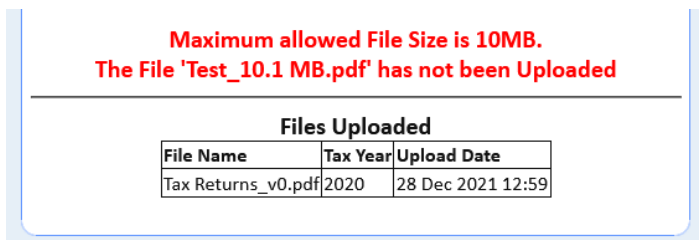
Click the [Browse] button to upload a file PDF file. A file upload dialog box will appear.



Once the user has selected the file to upload, the user should click the [Upload PDF] button. If the file is uploaded successfully, the page will display a message saying the file has been uploaded successfully and the file will be listed among the uploaded files on the page.

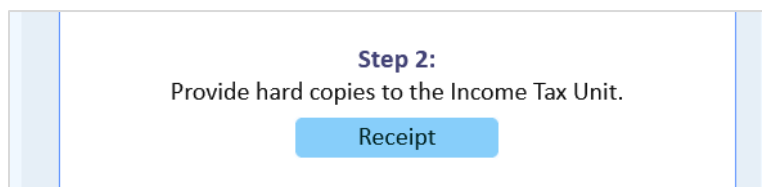


Otherwise, the page may display an error if the portal encounters some issues with the file.



## 2.2.8 Print the Receipt

Once the user has submitted the data through the portal, the user can print or save the receipt from the Tax Portal for records purposes. From the Home page, the user can click on the [Receipt] button. This will open the 'Receipt' page.



The page will display the status of each form submission and a list of documents the user has uploaded onto the portal.

**UN INCOME TAX PORTAL**

Index #: [REDACTED] Name: [REDACTED]

**Receipt**  
Index #: [REDACTED] Name: [REDACTED]

Please select a year:  
2020

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
2020	Federal	12 Jan 2022 12:53

The following files were uploaded online:

Tax Year	File Name	Upload Date
2021	Tax Returns_v0.pdf	19 Jan 2022 13:03

Please print this page as your receipt for your records.

Print Receipt

The user can print the receipt using the [Print Receipt] button at the bottom this page.

**Note:** The user will only be able to see the receipt after completing and **submitting** at least the Federal claim. The receipt will show anything even if the user has uploaded documents without submitting a claim.

### 2.2.9 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

This will open the 'Check Status' page. The user should select the tax year from the dropdown list in order to display the reimbursement status for that year.



 **UN INCOME TAX PORTAL**

Index #: ████████ Name: John Doe4

**Check the status of your reimbursement request**

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

Please select a year:

2020 ▾

The Status of your Reimbursement process is:

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

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### 2.2.10 Logging out

The user should sign out of the portal once the user has finished whatever they intended to do by clicking on the 'Logout' link on the main menu. The user should confirm the action by clicking on their account (email address). After signing out, the user will see the message 'You have successfully signed out'. The user can close the browser.

**Pick an account**

Which account do you want to sign out of?

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 ██████████ ██████████  
 ██████████@un.org  
 Signed in

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**You have Signed Out**

It's a good idea to completely close this browser

**Note:** To avoid being locked out of the portal on the next login attempt, the user should always sign out properly after working with the portal. This will prevent issues that may arise due to improperly ended sessions.

### 3 Conclusion

For more information, comments, or issues with the UN Income Tax portal, please send an email to the address [taxportal@un.org](mailto:taxportal@un.org).

Also, for any general information about UN Income Tax Unit, you may visit the Tax website at <http://www.un.org/tax>.