

# UN INCOME TAX PORTAL

## USER Manual

DOS/DA/PS/ITU

AUGUST 2023

# Summary

Through the joint efforts of Finance Division and the UN Income Tax Unit, a web portal called 'UN Income Tax Portal' was developed to allow UN system staff members and US taxpayers 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 taxpayers 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)

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.

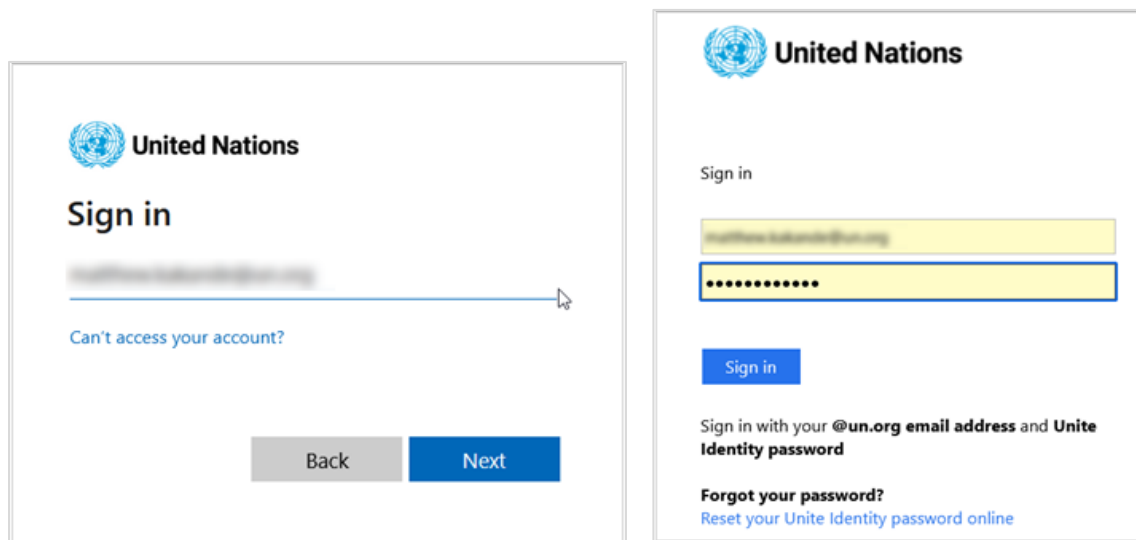
The purpose of this Manual is to give a synopsis and to guide the staff member on how to use the Tax Portal. The manual explores the functionalities of the portal accessible to the basic users.

# 1 User Login

To access the UN Income Tax Portal, open your internet browser and type the URL <https://taxportal.un.org> or visit the Tax Portal tab on the UN Income Tax Unit’s website.

At the start of every tax season, the UN Income Tax Unit pre-registers all email addresses for the taxpayers to access the portal.

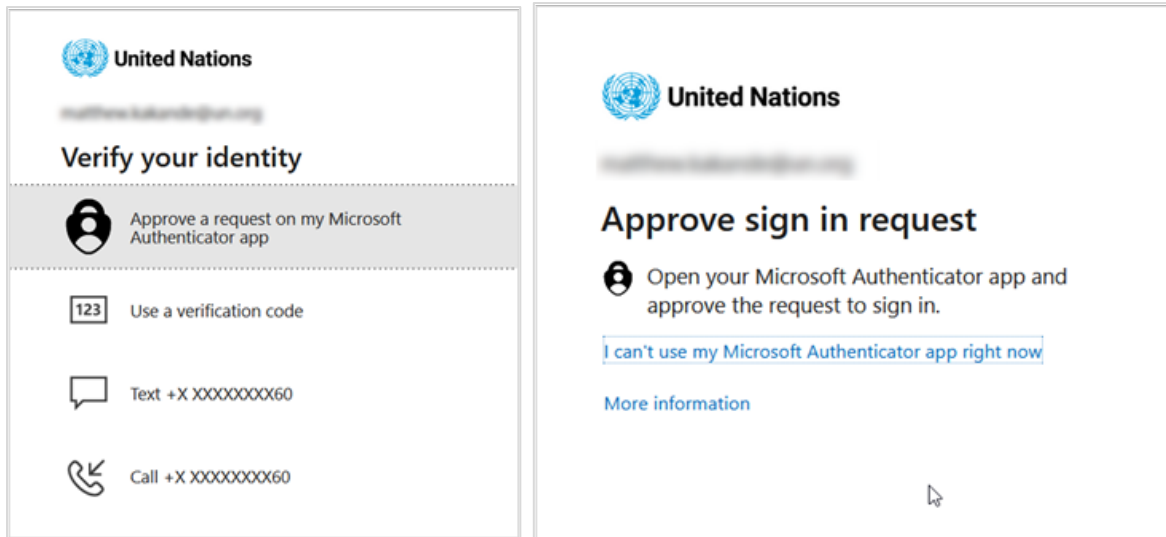
At the log-in page, you will be prompted to sign in using the email address you have provided to the UN Income Tax Unit. For example, if you are still an active UN system staff member, please enter your UN email address. If you are a retiree or other taxpayer who have separated from the UN system, a personal email address from other domains, such as Gmail, Yahoo and Hotmail can be used, and access will be granted to that email address. However, users with a personal email address will be required to create a free Microsoft account using the same personal email address; a [user guide](#) is available on our UN Income Tax Unit’s website.



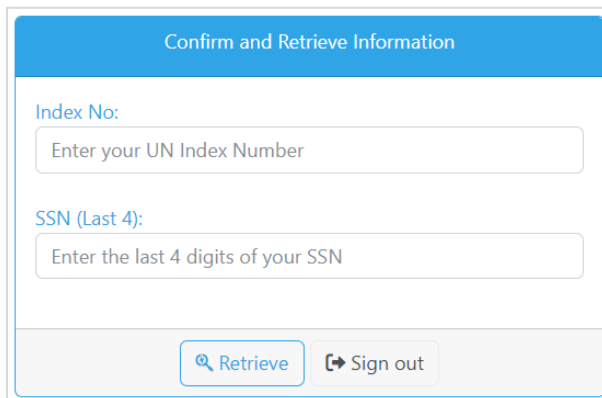
Enter the email address you provided to the UN Income Tax Unit and click “Next”. You will be directed to the Organization’s sign-in page, then you can log in using the email address and password, using Microsoft multi-factor authentication.

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

Please note that some UN organizations have implemented Single Sign On (SSO) for some web browsers e.g., Microsoft Edge. What this means is that the sign-on screen for the UN Income Tax Portal will be skipped in case you have already signed into another application using the same credentials. Furthermore, it could be skipped based on your Windows login.



Once you have successfully signed into the UN Income Tax Portal, you will be required to provide your UN Index Number and the last 4 digits of your Social Security number (SSN). This is the second level of authentication to ensure your information is secure.

The image shows a screenshot of a web form titled 'Confirm and Retrieve Information'. The form has a blue header bar with the title. Below the header, there are two input fields. The first is labeled 'Index No:' and contains the placeholder text 'Enter your UN Index Number'. The second is labeled 'SSN (Last 4):' and contains the placeholder text 'Enter the last 4 digits of your SSN'. At the bottom of the form, there are two buttons: a blue 'Retrieve' button with a magnifying glass icon and a grey 'Sign out' button with a right-pointing arrow icon.

The UN Income Tax Portal will verify the index number and the last 4 digits of the SSN entered by comparing it against the taxpayers' information already available to the UN Income Tax Unit before accepting the logon and retrieving your information.

**The email address you used to sign in must match that which you provided to the tax unit, otherwise, you will be denied access to your information at this point.**

A successful sign-in will start a 30-minute session and you will be redirected to the UN Income Tax Portal Home page.



If the UN Income Tax Portal records inactivity from you for 30 minutes, you will be logged off automatically.

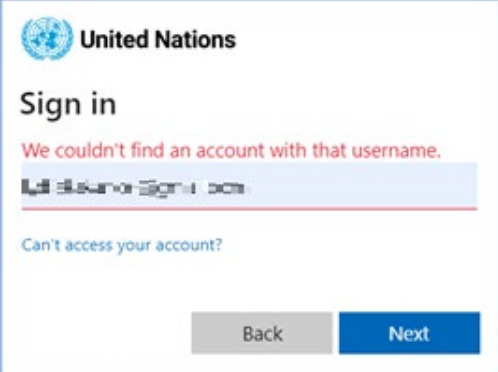
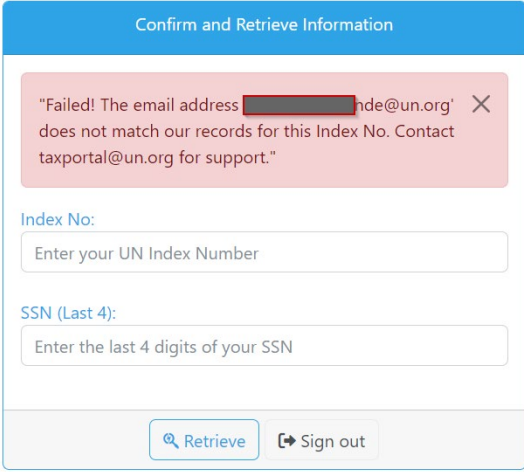
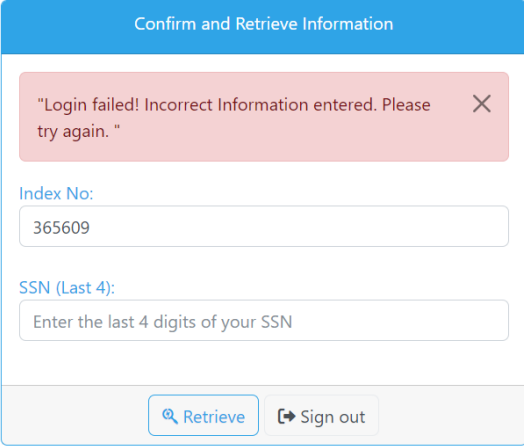
Please note that if you enter an incorrect SSN of the provided index number 3 times, your account will be **disabled**. To re-enable your account, you must send an email to [taxportal@un.org](mailto:taxportal@un.org) requesting that your account be reset; the email should include your UN index number and a description of the request.

In case you experience any errors when trying to access the UN Income Tax Portal please contact [taxportal@un.org](mailto:taxportal@un.org) for assistance; the email should also include your index number and a description of the support you need.

### 1.1 Common Login Errors

Following shown the common error screens.

<p>1. The email address has not been added to the United Nations tenant therefore it cannot be used to access any applications hosted by the United Nations Secretariat.</p>	 <p><b>United Nations</b></p> <p><b>Sign in</b></p> <p>Sorry, but we're having trouble signing you in.</p> <p>AADSTS50020: User account 'kaksmat@yahoo.com' from identity provider 'live.com' does not exist in tenant 'United Nations' and cannot access the application '5f7ea321-b03e-4984-8791-2f7176c975bf'(DOS-ITU_TP-PROD) in that tenant. The account needs to be added as an external user in the tenant first. Sign out and sign in again with a different Azure Active Directory user account.</p>
<p>2. The email address is already added the United Nations tenant but has not been given access to the UN Income Tax portal.</p>	 <p><b>DOS-ITU_TP-PROD</b></p> <p>Sorry, but we're having trouble signing you in.</p> <p>AADSTS50105: Your administrator has configured the application DOS-ITU_TP-PROD ('5f7ea321-b03e-4984-8791-2f7176c975bf') to block users unless they are specifically granted ('assigned') access to the application. The signed in user 'lnalukwago@unicef.org' is blocked because they are not a direct member of a group with access, nor had access directly assigned by an administrator. Please contact your administrator to assign access to this application.</p>

<p>3. The email address does not have Microsoft account. You need to visit <a href="https://account.microsoft.com">https://account.microsoft.com</a> and create a free account with this email address.</p>	 <p>The screenshot shows the United Nations 'Sign in' page. At the top is the United Nations logo and the text 'United Nations Sign in'. Below this is a red error message: 'We couldn't find an account with that username.' There is a text input field for the email address, which is currently empty. Below the input field is a link that says 'Can't access your account?'. At the bottom of the page are two buttons: 'Back' and 'Next'.</p>
<p>4. The email address you used to access the tax portal is different from that which you provided to the tax unit, i.e. the tax portal uses the provided index number to check if the email address of that index number is the same as the address that has signed in.</p>	 <p>The screenshot shows the 'Confirm and Retrieve Information' page. At the top is a blue header with the text 'Confirm and Retrieve Information'. Below this is a red error message box that says: 'Failed! The email address [redacted]@un.org does not match our records for this Index No. Contact taxportal@un.org for support.' Below the error message are two input fields: 'Index No:' with the placeholder text 'Enter your UN Index Number' and 'SSN (Last 4):' with the placeholder text 'Enter the last 4 digits of your SSN'. At the bottom of the page are two buttons: 'Retrieve' and 'Sign out'.</p>
<p>5. You have entered the incorrect last 4 digits of the SSN for the provided index number.</p>	 <p>The screenshot shows the 'Confirm and Retrieve Information' page. At the top is a blue header with the text 'Confirm and Retrieve Information'. Below this is a red error message box that says: 'Login failed! Incorrect Information entered. Please try again.' Below the error message are two input fields: 'Index No:' with the value '365609' and 'SSN (Last 4):' with the placeholder text 'Enter the last 4 digits of your SSN'. At the bottom of the page are two buttons: 'Retrieve' and 'Sign out'.</p>

6. The index number you have entered is not registered by the tax unit as that of an eligible US UN taxpayer.

Confirm and Retrieve Information

"Index No: 3656091 is Invalid or Unauthorized to Access. Contact taxportal@un.org for support." X

Index No:  
3656091

SSN (Last 4):  
Enter the last 4 digits of your SSN

Retrieve Sign out

## 2 Navigating the Portal

Once you successfully sign into the UN Income Tax Portal, you will see a navigation menu on the top of the tax portal as follows by five main buttons; Home, Resources, Upload Documents, Enter Data, and Submit Data/Check Status. It also has a “Sign out” button at the right which will sign you out of the UN Income Tax Portal.

### 2.1 Home page

The Home page displays 3 sections: the content, the user information, and the reimbursement status.

1. The content section lists the important points that you may need to consider before using the UN Income tax portal and has a link to download the user manual. It is recommended that you read these instructions carefully.
2. The user information section displays your details as the currently signed-in user.
3. The Reimbursement status section displays the status of your tax claim request for the current tax season. This status will only be updated after you enter and submit data on the ‘Submit Data/Check Status’ page. Uploading documents alone will not affect this status.

**Welcome to the UN Income Tax Portal**  
*The portal is open for 2022 tax claim submissions ONLY.*

**Please take note of the following important points:-**

1. In addition to the input and submission of data/information in the Tax Portal line items you are required to upload signed copies of your Tax return(s) together with completed and signed UN Forms F65, F65A and IRS Form 4506-C. Your Claim submission is not complete without the file upload.
2. It is your responsibility to file your taxes with IRS before the filing deadline set by the US Tax authorities, unless you request for an extension. The filing deadline for the previous tax year is April 18 of the current year
3. The UN deadline for submission of the previous year Tax claim for US based staff is March 1, and April 1 for Overseas staff members taking advantage of the automatic 2-month extension.
4. The deadline to request for reimbursement of US taxes with UN is one year from the actual IRS deadline.
5. The UN will not pay any penalty and interest related to late filing.
6. If you do not submit your tax claim to the UN in time, there is no guarantee that UN will make tax payments to IRS before the deadline. Please visit <https://tax.un.org> for important deadlines and other information
7. For any technical issues with the Tax Portal, send email to [taxportal@un.org](mailto:taxportal@un.org). For any other queries, send email to [tax@un.org](mailto:tax@un.org)
8. To continue with your Tax claim submission please select “Submit Data/Check Status” on the navigation Menu above. Please ensure that you only enter numeric characters and no decimal places

[Download User Manual](#)

**Settlement Status** as at: 22/6/2023 11:10:38 PM  
Your settlement request is being reviewed.

Go to the Main Menu, then select 'Submit Data/Check Status' for details of your submission.

You should endeavour to read and understand these instructions to avoid making any mistakes.

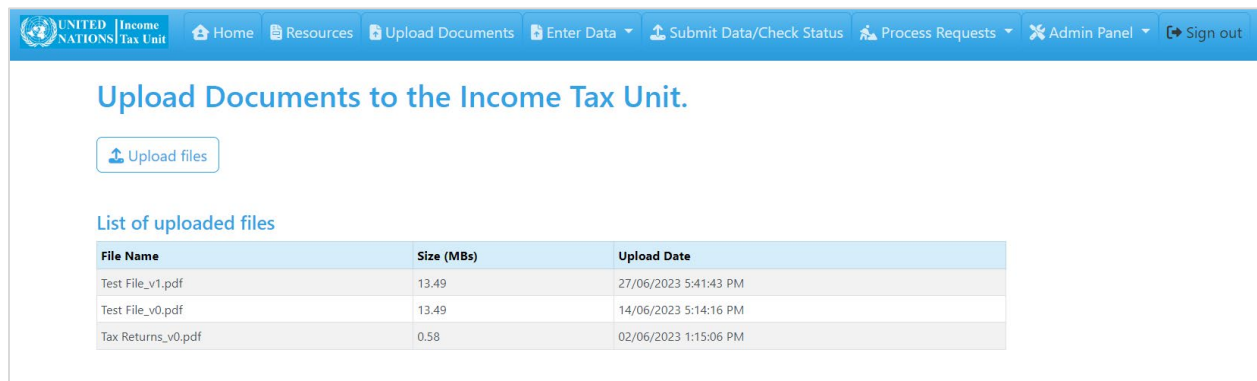


## 2.2 The Resources page

Here you can download some useful documents that will help you complete your tax claims, such as the user manual, the UN and the IRS forms, and a Sample Statement of Taxable Income. Several other resources and information is available on the Tax Unit website.

## 2.3 The Upload Documents page

This is where you submit your duly signed and scanned PDF documents. From the Main Menu, click on the 'Upload Documents' button. The Upload Documents page will open. Then, Click the "Upload Documents" button and read the instructions on the page carefully before uploading your documents.



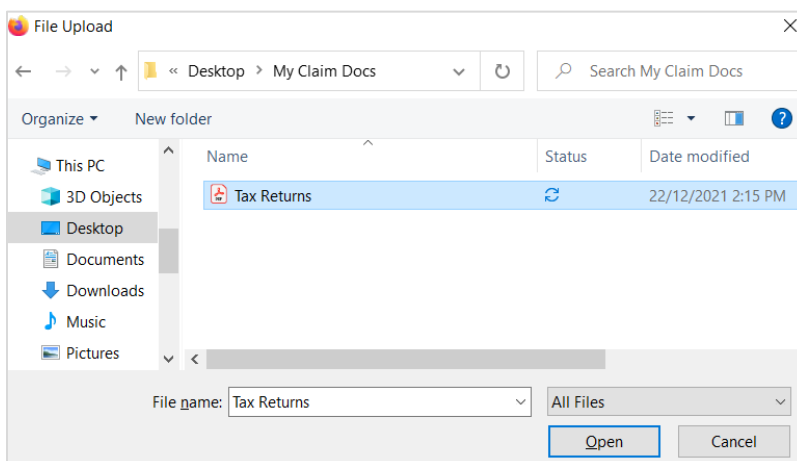
File Name	Size (MBs)	Upload Date
Test File_v1.pdf	13.49	27/06/2023 5:41:43 PM
Test File_v0.pdf	13.49	14/06/2023 5:14:16 PM
Tax Returns_v0.pdf	0.58	02/06/2023 1:15:06 PM

If the have already uploaded some documents for the current tax season, these will be displayed; otherwise, you should click the 'Upload files' button on this page to be redirected to the upload verification page.

You should carefully read the instructions on this page to understand what to do and how the portal will treat the files.

You can only upload one file at a time. To upload a file, Click Choose Files, then select the file to upload; and then click Upload Selected file. **It is recommended that you submit all your documents in one combined file.**

A file upload dialog box will appear where you can select and upload a file.



If the file is uploaded successfully, the page will display a message indicating that the file has been uploaded successfully and the file will be listed among the uploaded files on the page.


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

"Upload failed for file: 'Returns\_7490\_v0.pdf'; Missing or Wrong password"

Choose File No file chosen

File Password (optional)

Enter Password to open File

 Upload Selected file (s)

In case you need to update an already uploaded file, simply upload the correct file with the same name as the original file because the Portal will consider it an amendment of the original file if you upload a file with the same name as a previously uploaded file. The UN Income Tax Unit will then consider only the latest version to process your claim.

## 3 Data Entry

The Enter Data button opens a dropdown menu from which you can select to enter either Federal or State data. During a session, you will be able to submit information on your Federal income tax claim and/or your state(s) income tax claim.

Because of internal limitations, you will only be able to enter information for the federal and the following states: Connecticut, Maryland, New Jersey, New York State, Pennsylvania, Virginia, and Washington D.C.

You may only enter information for up to 2 states and one of them **must** be New York State. Additionally, you do not have to submit the forms within one session, you can save the form and return it later.

It is recommended that you save as **often** as possible to avoid data loss that may arise from the session's timeout.

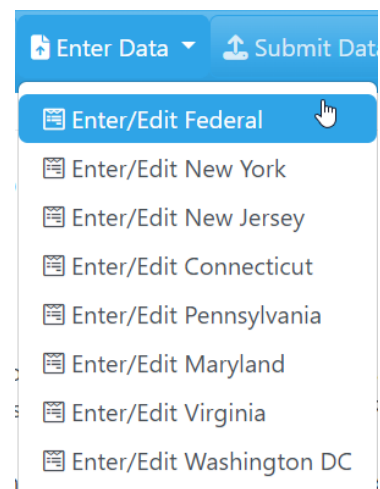
After the submission of the data, you can later make amendments to the form and resubmit for the same type of form for the same year.

You must enter and save/submit your federal data first, before being able to access any state data entry forms.

### 3.1 Entering Federal Data

On the Enter data dropdown, click the 'Enter/Edit Federal' button. This will open the 'Federal Tax Return' form.

The form consists of 2 pages. Page 1 has a list of mandatory Yes and No questions and Page 2 has dynamic fields which will only appear based on the options you selected on Page 1. **Note that only numeric figures and whole integers should be entered on this page. Do not enter any decimals, spaces, or other characters, such as commas, dollar signs, brackets, or dots. For example, if you enter this \$15,000; the data will not be saved.**



Ensure to click the “Save” button at the bottom of the form as often as possible to avoid data loss due to system timeout. Also, note that saving data is not the same as submitting the data.

At the bottom of the form is a button which you can use to navigate back to the first page and be able to change the responses.

**2022 Federal Tax Return - Page 1 of 2**

This form was last modified on 12/07/2023 3:55:32 PM

Did you work for any UN agencies or entities that are <b>NOT</b> listed here? <b>Required</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
Do you have Form 2555 (Foreign Earned Income)? <b>Required</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
Did your spouse work for any of the agencies or entities listed here? <b>Required</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
Did your spouse work for any UN agencies that are <b>NOT</b> listed here? <b>Required</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
Does your Spouse have Form 2555? <b>Required</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
Do you have Form 6251 (AMT)? <b>Required</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
Are required to attach Schedule D with your Form 1040? <b>Required</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
Select the Filing status on Form: <b>Required</b> <a href="#">See sample STE</a>	<input checked="" type="radio"/> Single <input type="radio"/> Married, filing jointly <input type="radio"/> Married, filing separately <input type="radio"/> Qualifying widow(er) with dependent child <input type="radio"/> Head of household

1	ECA	16	UNHQ
2	ESCAP	17	UNICEF
3	ESCWA	18	UNITAID
4	IARC	19	UNITAR
5	ICC	20	UNOG
6	ICJ	21	UNON
7	ICTR	22	UNOPS
8	ICTY	23	UNOV
9	MICT	24	UNRWA
10	OPCW	25	UNU
11	PAHO	26	UNWOMEN
12	UNAIDS	27	WHO
13	UNDP	28	UNICC
14	UNFPA		
15	UNHCR		

Next ▶▶

UNited Nations Income Tax Unit | Home | Resources | Upload Documents | Enter Data | Submit Data/Check Status | Process Requests | Admin Panel | Sign out

## 2022 Federal Tax Return - Page 2 of 2

This form was last modified on 12/07/2023 3:55:32 PM

Enter the total of your UN earnings from UN agencies or entities:	\$ 100000
UN Income Subject to SE Tax: <i>If you are a full year resident, use the total UN income from your statement of taxable earnings(STE) form. If you are a part-year resident, prorate it.</i> <a href="#">See sample STE</a>	\$ 0
UN earning from other agencies:	\$ 0
Please enter your spouse's UN index number:	\$ 0
Enter the total of your SPOUSE's UN earnings from UN agencies or entities:	\$ 0
Please enter your spouse UN Income Subject to SE Tax:	\$ 0
Please enter your spouse income from any other organization:	\$ 0

Reset Form Save

**List of UN Agencies/Entities**

1	ECA	16	UNHQ
2	ESCAP	17	UNICEF
3	ESCWA	18	UNITAID
4	IARC	19	UNITAR
5	ICC	20	UNOG
6	ICJ	21	UNON
7	ICTR	22	UNOPS
8	ICTY	23	UNOV
9	MICT	24	UNRWA
10	OPCW	25	UNU
11	PAHO	26	UNWOMEN
12	UNAIDS	27	WHO
13	UNDP	28	UNICC
14	UNFPA		
15	UNHCR		

### Important Notes:

1. Exiting the page without clicking the save button will lead to **loss** of the data you have just entered.
2. Saving the form is different from submitting it. Please see next section for details on submitting all the forms.

### 3.2 Entering State Data

If you have any state forms to submit, you should navigate to the 'Enter data' dropdown button, then click the button for that state. The format of the state forms is similar to the Federal form. Each form has 2 pages and a save button at the bottom of page 2.

## 4 Data Submission

Once you have entered all the necessary federal and state forms, you can proceed to submit your data by clicking the “Submit Data/Check Status” button on the main menu.

On this page, you will see a list of all the forms that you entered (saved). If you have previously submitted any data, you will see a list of the forms you submitted. You will also see a list of all the documents you have uploaded to the tax portal.

### Submit Forms / Check Status

The following tax returns requests are ready to be submitted.

Form	Status	Status Date
Federal	Saved	1/4/2023 12:17:51 PM
New York State	Saved	1/4/2023 12:18:14 PM

[Submit Form\(s\)](#)

The following documents were uploaded.  
Please ensure that your uploads were properly completed, signed and scanned pdf copies of your Tax Returns, UN Forms and IRS Form 4506-C

File Name	Size (MBs)	Upload Date
Tax Returns_v1.pdf	0.58	10/10/2022 10:44:27 PM
Tax Returns_v0.pdf	0.58	10/10/2022 10:44:27 PM

A “Submit forms” button will appear in case you have any saved forms that are not yet submitted. When you click the “Submit forms” button, your data will be submitted, and you will receive a confirmation email. Please note that you can make amendments to the form later and resubmit for the same type of form for the same year if necessary.

The following tax returns requests were submitted.

Form	Status	Status Date
Federal	submitted	1/4/2023 12:27:40 PM
New York State	submitted	1/4/2023 12:27:40 PM

The data will be transmitted to the Income Tax Unit and an automatic email notification will be sent to your registered email address indicating that the data have been submitted successful.

You should refer to this submission page and the email notification as proof of submission of your tax claim to the tax unit.

After you submit the data online and after the required forms, copies of returns are submitted to the Income Tax Unit, the Income Tax Unit will process the taxpayer's reimbursement.



## 5 Checking Reimbursement Status

Once you have submitted the data, it will be logged into the Tax Unit's internal processing system, you will be able to see the status of your claim at the bottom of the home page of the tax portal. The status gives information about the reimbursement entered online.

**Settlement Status** as at: 22/6/2023 11:10:38 PM  
Your settlement request is being reviewed.

Go to the Main Menu, then select 'Submit Data/Check Status' for details of your submission.

The portal will show one of the following reimbursement process statuses:

- i. Your tax data entry was saved but not yet sent. Please submit when ready.
- ii. Your tax data was submitted and is waiting to be received by the Tax Unit.
- iii. Your tax data was received. Please ensure that you uploaded completed, signed and scanned pdf copies of your Tax Returns and UN Forms and IRS Form 4506-C, if not done yet.
- iv. Your tax data, UN forms and copies of tax returns were received by the Tax Unit and are awaiting review.
- v. Your settlement request was rejected. Please wait for email or letter from Tax Unit for additional information.
- vi. Your settlement request is being reviewed.
- vii. Your settlement request was approved. Please wait for further information from Tax Unit.

## 6 Signing out

You should sign out of the portal once you have finished whatever they intended to do by clicking on the 'Sign Out' button on the main menu. You should confirm the action by clicking on your account (email address). After signing out, you will see the message 'You have successfully signed out'. You should close the browser.