

Tax Form

Questions

Insured's Name:

State: Date of Birth: Gender: Male Female Passport no:

SSN: Email Address:

Marital Status: Single Married Divorced Others

Are you a retiree? Yes No



UN INCOME TAX PORTAL

User Manual

Introduction

The UN Income Tax Portal is a web-based platform developed by the UN Income Tax Unit. This portal enables UN system staff members who are US taxpayers to submit their income tax claims electronically.

Key Benefits

- Faster reimbursement processing through streamlined digital submission
- Online status tracking for reimbursement claims
- Centralized document management and submission tracking

Important: Submitting data through the portal does not eliminate the requirement to upload scanned copies of signed tax returns, along with completed UN forms F.65, F.65/A, and F.243. All documents must be clear, legible and complete.

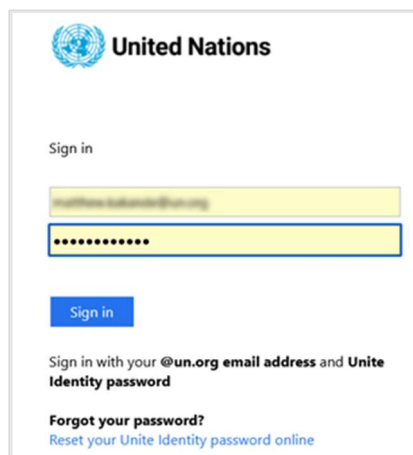
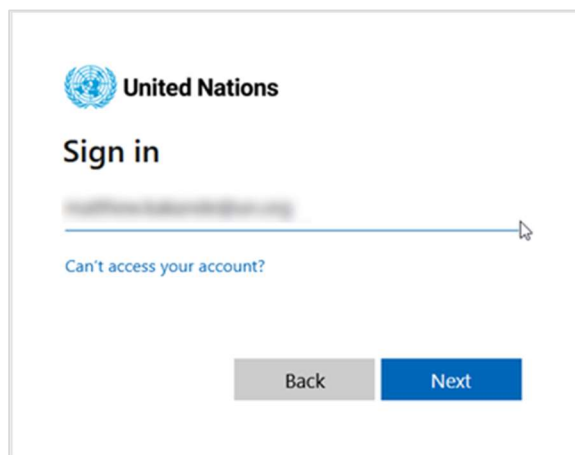
1 Accessing the Portal

1.1 Initial Access

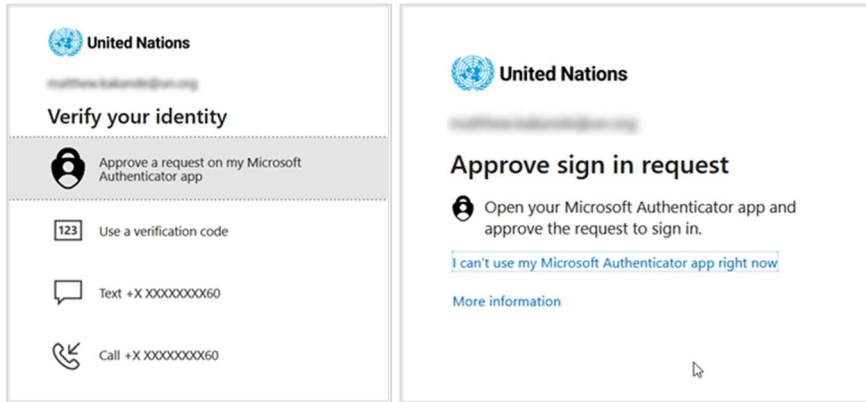
1. Open your internet browser and go to <https://taxportal.un.org> or access through the Tax Portal tab on the UN Income Tax Unit's website
2. At the start of each tax season, the UN Income Tax Unit pre-registers email addresses for taxpayers to access the portal. You should verify your access to the portal once the tax season begins.
3. On the login page, enter the email address provided to the UN Income Tax Unit.
4. Active staff members should use their UN (or UN Agency) email address. This should be your official email address e.g. @un.org, @unicef.org, @undp.org, etc. The email must be the one registered with the Tax Unit
5. Retirees and separated staff can use personal email addresses (Gmail, Yahoo, etc.)
 - a. Note: Personal email users must create a free Microsoft account
 - b. A separate [guide](#) for creating Microsoft accounts is available on the Tax Unit website
 - c. The account must use the same email address provided to the Tax Unit

1.2 Authentication Process

1. After entering your email, you will be directed to the Organization's sign-in page to log in using your email and password with Microsoft MFA.



- Multi-Factor Authentication (MFA):** Complete the MFA authentication through the available options which include receiving a code via text or call, or using the Microsoft Authenticator app.



- Single Sign-On (SSO):** Some UN organizations/agencies have implemented SSO for certain browsers (e.g., Microsoft Edge), which may skip the sign-on screen if you are already signed into another application.
- Additional Authentication:** After signing in, provide your UN Index Number and the last 4 digits of your Social Security Number (SSN) for additional security, your UN Index number appears on your Statement of Taxable Earnings. The portal verifies this information against the UN Income Tax Unit's records.

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 text 'Enter your UN Index Number'. The second is labeled 'SSN (Last 4):' and contains the text 'Enter the last 4 digits of your SSN'. At the bottom of the form, there are two buttons: a blue button with a magnifying glass icon labeled 'Retrieve' and a grey button with a right-pointing arrow icon labeled 'Sign out'.



1.3 Important Security Notes

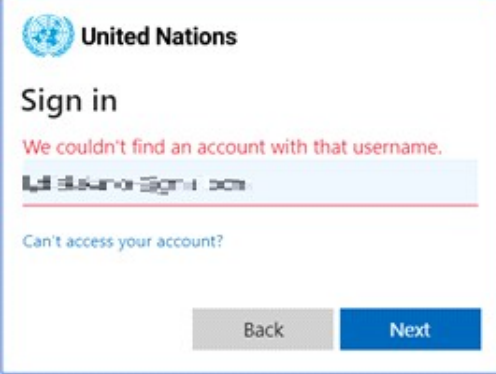
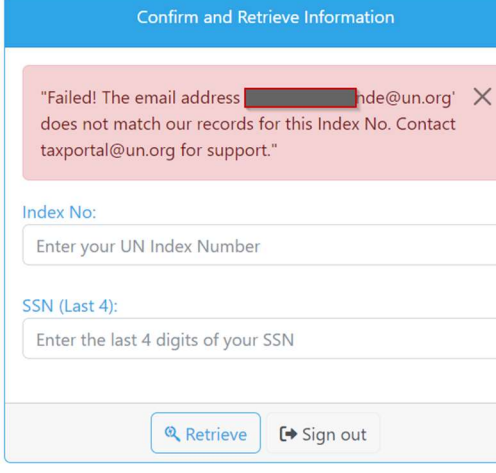
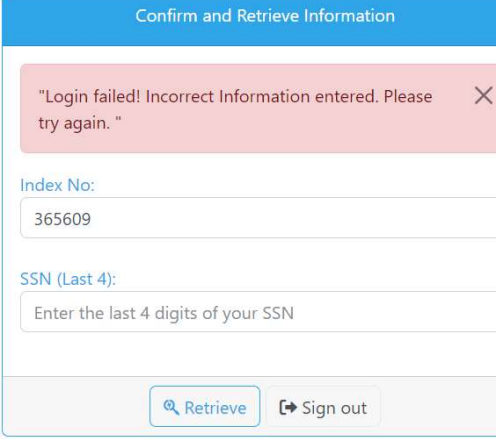
1. Incorrectly entering the SSN or index number three times will disable your account. Contact the portal administrator to reset your account by submitting a ticket through the Tax unit’s website.
2. A successful sign-in starts a 30-minute session. Inactivity for 30 minutes will result in automatic logout. Any unsaved data will be lost.
3. Password requirements follow Microsoft account standards
4. Regular password updates are recommended for security

1.4 Common Login Errors

If you encounter any errors while trying to access the UN Income Tax Portal, please contact the administrator using the [Contact Us](#) page on the tax unit website for assistance. Be sure to clearly describe the issue you are experiencing with the portal.

Below are the common error screens you might encounter.

<p>1. The email address has not been added to the United Nations tenant, so it cannot be used to access any applications hosted by the United Nations Secretariat.</p>	 United Nations Sign in <input type="text" value="Sorry, but we're having trouble signing you in."/> <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>	 DOS-ITU_TP-PROD <input type="text" value="Sorry, but we're having trouble signing you in."/> <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 'Inalukwago@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. Please visit https://account.microsoft.com 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 are two buttons: "Back" (grey) and "Next" (blue).</p>
<p>4. The email address you used to access the tax portal is different from the one you provided to the tax unit. The tax portal uses the provided index number to verify if the email address associated with that index number matches the one used to sign 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: "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 "Enter your UN Index Number" and "SSN (Last 4):" with the placeholder "Enter the last 4 digits of your SSN". At the bottom are two buttons: "Retrieve" (blue) and "Sign out" (grey).</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: "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 "Enter the last 4 digits of your SSN". At the bottom are two buttons: "Retrieve" (blue) and "Sign out" (grey).</p>

6. The index number you 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 Portal Navigation

Upon successful login, the navigation menu includes the following buttons: Home, Resources, Upload Documents, Enter Data, Submit Data/Check Status, and Sign Out.

2.1 Home page

The Home page has 3 sections:

1. **Content Section:** Important portal usage instructions, latest announcements and updates, critical deadlines and reminders, and a link to download the user manual.
2. **User Information Section:** Displays details of the signed-in user.
3. **Reimbursement Status Section:** Shows the status of your tax claim for the current tax season.

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. For any other queries, send email to 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.

2.2 Resources page

Download useful documents such as the user manual, UN and IRS forms, and a Sample Statement of Taxable Income. Several other resources and information are available on the Tax Unit website.

2.3 Document Upload Process

1. This is where you submit your signed and scanned PDF documents.
2. Select "Upload Documents" from the main menu.
3. Upload one file at a time.
 - a. Maximum file size: 19.5 MB per file
 - b. Accepted format: PDF only
4. Select the submission type and document type:
 - a. **Initial Submission:** First-time tax claim submission for the tax year. It is recommended that you combine all documents into one file.
 - b. **Additional Information:** Submit any extra information for the tax claim that may have been missed in the Initial Submission.
 - c. **Miscellaneous Information:** Submit other kinds of information no relating to tax claims, e.g. proof of citizenship, address change, EFTPS enrollment, etc.
5. **To update a file:** To update previously submitted documents,
 - a. upload a new file with the same name.
 - b. The portal will version it and the tax unit will consider the latest version.

Upload one or more PDF files.

Instructions:

1. 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 25MB.
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.
6. If your file is password-protected, enter the password in the provided text box, otherwise your file will be rejected.

Submission Type -- Select the Submission Type --

Document Type -- Select the Document Type --

Upload File: No file chosen

Password (optional) Enter the Password here if the file is password protected

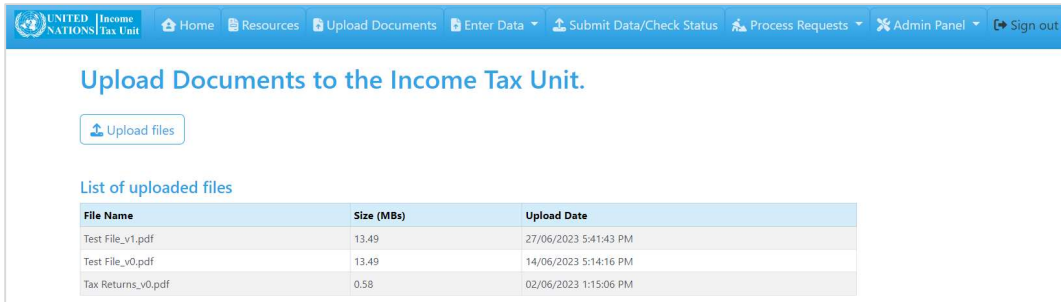
[Submit file](#)

6. **Document Verification:** The Portal performs automatic file checks, e.g. File format validation, Size limitation, etc.

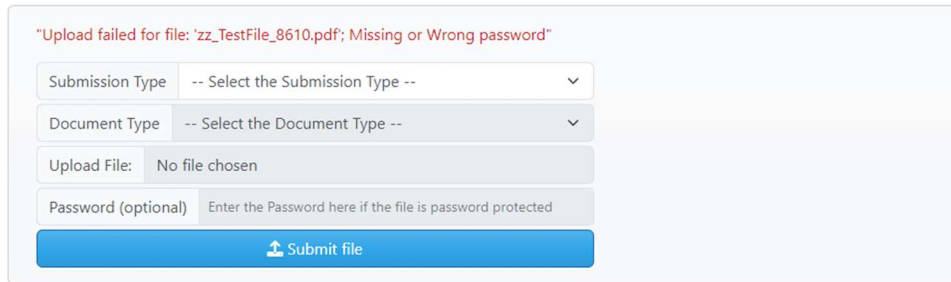
7. Recommendations:

- a. Ensure documents are clearly scanned.
- b. Combine initial submission documents into one file.
- c. Include all required forms in proper order. Refer to the filling requirements on the unit’s website.
- d. Ensure all pages are properly oriented.
- e. Verify that all signatures are visible.

8. Uploaded files are displayed on the uploads page.



9. The page will display an error if the portal encounters some issues with the file.



3 Enter Data

3.1 Federal Tax Return

1. You must enter data in this form before you can enter data in the state forms
2. It consists of two pages:
 - a. Page 1: Mandatory Yes/No questions
 - b. Page 2: Dynamic fields based on Page 1 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 **NOT** listed here? **Required** Yes No

Do you have Form 2555 (Foreign Earned Income)? **Required** Yes No

Did your spouse work for any of the agencies or entities listed here? **Required** Yes No

Did your spouse work for any UN agencies that are **NOT** listed here? **Required** Yes No

Does your Spouse have Form 2555? **Required** Yes No

Do you have Form 6251 (AMT)? **Required** Yes No

Are required to attach Schedule D with your Form 1040? **Required** Yes No

Select the Filing status on Form: **Required** Single Married, filing jointly Married, filing separately Qualifying widow(er) with dependent child Head of household

[See sample STE](#)

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		

Next >>

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: \$ 0
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.
[See sample STE](#)

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

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		

Reset Form Save

3.2 State Tax Returns

1. This form is only available for specific states: Connecticut, Maryland, New Jersey, New York State, Pennsylvania, Virginia, Washington D.C.
2. Maximum of two state submissions allowed
 - a. One must be New York State (in case 2 states are submitted)
 - b. Second state optional based on residence/work location
3. Similar two-page format as federal returns
 - a. State-specific questions and calculations

3.3 Data Entry Guidelines

1. Enter only whole numbers
 - a. No decimal points
 - b. Round to nearest dollar
2. Avoid special characters:
 - a. No commas
 - b. No dollar signs
 - c. No parentheses
3. Save frequently, i.e. minimum every 15 minutes
4. Saving is different from final submission. Data submission is discussed in the next section
 - a. Saved data can be modified before submission.
 - b. Submitted can be amended by another submission.

4 Submission Process

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

1. After entering all necessary data, navigate to "Submit Data/Check Status"
 - a. You view all saved forms.
 - b. You will view a list of submitted documents
2. Click "Submit Forms" to submit the data.

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

3. You will receive a confirmation email
4. You can track submission status on the home page.
5. You can make amendments and resubmit already submitted forms.

5 Checking Reimbursement Status

1. Once you have submitted the data, it will be logged into the Tax Unit's processing system.
2. You will be able to see the status of your claim at the bottom of the home page of the tax portal.
3. 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.

4. The portal will show one of the following reimbursement process statuses:
 - a. Your tax data entry was saved but not yet sent. Please submit when ready.
 - b. Your tax data was submitted and is waiting to be received by the Tax Unit.
 - c. 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.
 - d. Your tax data, UN forms and copies of tax returns were received by the Tax Unit and are awaiting review.
 - e. Your settlement request is being reviewed.
 - f. Your settlement request was approved. Please wait for further information from Tax Unit.
 - g. Your settlement request was rejected. Please wait for email or letter from Tax Unit for additional information.

6 Security and Session Management

6.1 Best Practices

1. Sign out after completing tasks. Click "Sign Out" button and then confirm sign-out action
2. Close browser after signing out. This clears the cache and will help prevent unauthorized access.
3. Report technical problems through the [Contact Us](#) page
 - a. Screenshot error messages and provide them when requested.
 - b. Document steps to reproduce issues
 - c. Include essential information:
 - UN index number
 - Detailed error description
 - Screenshots when requested
 - Steps to reproduce the issue
 - d. Expected response time: 2-5 business days