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## **FILING THE QUADRENNIAL REPORT**

All statutorily exempt organizations must file a quadrennial informational report (once every four years).

To access your exemption account and file the quadrennial report, visit My Alabama Taxes at [myalabamataxes.alabama.gov](https://myalabamataxes.alabama.gov).

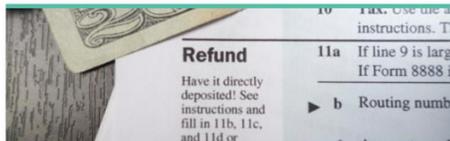
### **CREATING A NEW PROFILE IN MY ALABAMA TAXES**

1. Log in to My Alabama Taxes using the following information found on your EXM Filing Info letter.
  - a. 10-digit Account Number (may include alpha and numeric characters)
  - b. Sign-On ID
  - c. Access Code
  - d. Your email address (This is required in order to receive confirmation emails and authentication code messages.)

2. Click "Create a My Alabama Taxes account." This will take you to the **New My Alabama Taxes User** page.

SCHEDULED MAINTENANCE

ALDOR will experience network maintenance on Saturday, February 24. Any outage should occur sometime between 7 a.m. and 3 p.m. and last no longer than 30 minutes, and could affect My Alabama Taxes. We apologize for any inconvenience.



Refunds

View my refund status.

> [Check my refund status/Where's My Refund](#)



Payments

Make a payment.

> [Pay a bill I've](#) [Scroll for More](#)



Other Requests

Provide feedback or continue a request.

> [Continue/View an Existing Request](#)

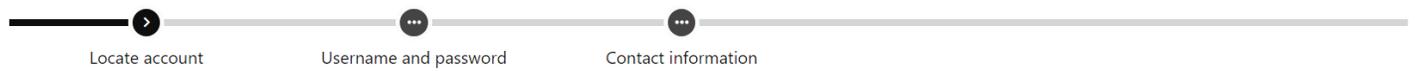
3. Validate the account by entering the required “Who Are You?” information. Tax Type is Exempt - Sales.
4. Click “Next.”



< My Alabama Taxes

### New MAT User

#### New MAT User



### Who Are You?

Tax Type (choose one)  
Exempt - Sales

Account ID (looks like R000000000 or 0000 00000) \*  
*Required*

Please verify your identity by providing your **Sign-on ID** and **Access Code**. These were **mailed** to you when you first registered your business with the Alabama Department of Revenue (ADOR).

Sign-on ID \*  
*Required*

Access Code \*  
*Required*

Cancel

< Previous **Next** >

5. Enter the required "Create a MAT Username and Password" information.
6. Click "Next."

MAT  My Alabama Taxes (Home) Rollout Development Staging ?

< My Alabama Taxes

### New MAT User

#### New MAT User

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Locate account    Username and password    Contact information

#### Create a MAT Username and Password

Username \*  
Required

Password \*  
Required 

Re-enter your Password \*  
Required 

#### Password Recovery Method

Password recovery question \*  
Required

Answer \*  
Required

[Cancel](#)    [Previous](#)    [Next](#)

7. Enter the required "Contact Information."

8. Click "Submit."

< My Alabama Taxes

## New MAT User

### New MAT User



### Contact Information

Your full name

*Required*

Email address \*

*Required*

Re-enter your Email address \*

*Required*

Phone number \*

*Required*

Alternate phone number (optional)

Cancel

< Previous

Submit

9. Click "Print Confirmation" if you wish to have a hard copy.

10. Click "Done" to close the confirmation window.

MAT  [My Alabama Taxes \(Home\)](#) Rollout Development Staging ?

< My Alabama Taxes

### Confirmation

You are ready to sign in to My Alabama Taxes!

Please return to the MAT home page to sign in with your username and password. The first time you sign in you will choose a way to receive security codes (e.g., by email or text message). This will help prevent unauthorized access to your tax information.

Your request number is 0-618-126-752.

**MAT User Details:**  
Username: Testuser  
Name: Jane Doe  
Email: jrobinson@revenue.alabama.gov  
Contact Phone: (334) 123-4567  
Alternate Phone:

[Done](#) [Print Confirmation](#)

### Feedback (optional)

How easy was this process? Click "Send" to give us your feedback (this will not navigate you away from this page).

☆ ☆ ☆ ☆ ☆

Comments

[Send](#)

11. Once the confirmation email is received, go back to the My Alabama Taxes logon page, then enter the username and password.
12. You will be asked to choose a two-step verification method: **Authentication App, Text Message, or Email**. Select only one authentication method.



## Protect your My Alabama Taxes profile with two-step verification

Two-step verification is used to better protect your My Alabama Taxes profile. Once we have it setup you'll be asked to provide a unique security code to verify your identity each time you log in.

### Authentication App

Use an authentication app, such as Google Authenticator, to get security codes.

[Set Up](#)

### Text Message

Receive security codes by text message.

[Add Phone](#)

Message and data rates may apply. To stop receiving SMS messages, remove your number above.

### Email

Receive security codes by email.

[Add Email](#)

Cancel

Confirm

## AUTHENTICATION APP

- Scan the QR code or manually enter the code.
- Click "Save."



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< Two-Step Verification Setup

### Set Up Authentication App

Instead of waiting for text messages or emails, get your My Alabama Taxes security codes on your device. Any time-based one-time password (TOTP) app, such as Google Authenticator, can be used.

Scan the QR code or enter the key below manually into your authentication app to get started.



Can't scan it? Enter this key in your authenticator app instead (spaces not required).

BQWD IOCZ OLU5 PX3K

Cancel

Save

## TEXT MESSAGE

- Enter phone number.
- Click "Save."



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< [Two-Step Verification Setup](#)

### Add Phone

A security code will be sent via text message when trying to log in. Message and data rates may apply.

What phone number would you like to use?

Country

USA

Phone Number \*

Required

By adding your number you consent to receive SMS messages when you log in. Message and data rates may apply. To stop receiving SMS messages, remove your number from your two-step verification setup.

Cancel

Save

## EMAIL

- Enter email address.
- Click "Save."



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< [Two-Step Verification Setup](#)

### Add Email

A security code will be sent via email when trying to log in. Add TaxpayerService@revenue.alabama.gov to your email whitelist to prevent security codes going to your junk folder.

What email address would you like to use?

Email \*

Required

Cancel

Save

THE WINDOW YOU SEE WILL VARY DEPENDING ON THE AUTHENTICATION METHOD YOU CHOOSE.  
IN THE EXAMPLE BELOW, THE TEXT METHOD WAS CHOSEN.

13. Enter the security code.

14. Click "Confirm."



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< Two-Step Verification Setup

### Verify Security Code

A text message with your My Alabama Taxes security code was sent to (334) 123-4567.

Security Code \*

Required

[Populate](#) in development environments only.

Didn't receive your security code? [Resend](#)

Cancel

Confirm

## ADDING THE “EXEMPT - SALES” TO A PROFILE THAT ALREADY EXIST IN MY ALABAMA TAXES

1. Enter your username and password.
2. Click “Sign In.”



Rollout Development Staging

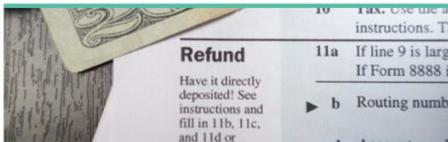
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### SCHEDULED MAINTENANCE

ALDOR will experience network maintenance on Saturday, February 24. Any outage should occur sometime between 7 a.m. and 3 p.m. and last no longer than 30 minutes, and could affect My Alabama Taxes. We apologize for any inconvenience.



### Refunds

View my refund status.

> [Check my refund status/Where's My Refund](#)



### Payments

Make a payment.

> [Pay a bill I've](#) [Scroll for More](#)



### Other Requests

Provide feedback or continue a request.

> [Continue/View an Existing Request](#)

3. Click "Other Actions..." tab.

4. Click "Add access to an existing account."

MAT  [My Alabama Taxes \(Home\)](#) Rollout Development Staging ? 

Welcome, Jane Doe  
You last logged in on Friday, Feb 23, 2024 8:57:38 AM  
[Manage My Profile](#) 

Accounts Tasks <sup>2</sup> Security **Other Actions...**

### Tax Incentives

Manage business credits.

- > [View business credit certificates](#)

### Access Management

Manage access of accounts I have access to.

- > **[Add access to an existing tax account](#)**
- > [View Access](#)
- > [Hide/Show Ceased Accounts](#)

### Payments and Returns

Manage payments and returns.

- > [Manage payments and returns](#)
- > [Pay a bill I've received from ALDOR](#)
- > [Submit a Collection Information Statement form](#)
- > [Apply for a Certificate of Exemption for a Contractor's Exempt Project](#)
- > [Submit an Electronic Funds Transfer Authorization Agreement Form](#)

### Feedback

Let us know how MAT could be improved.

- > [Ask a question](#)
- > [Provide feedback about MAT](#)

### Nexus Questionnaire

Submit a Nexus Questionnaire or provide additional information.

- > [Submit a Nexus Questionnaire](#)
- > [Submit Response to Request for Additional Info](#)

### Voluntary Disclosure Agreement

Associate an Account to a VDA Request

- > [Associate Voluntary Disclosure Agreement](#)

5. Enter the required "Locate account" information.

6. Click "Submit."



Add Access to Account



Add Access to Account



Locate account

**Locate account**

Account type  
Exempt - Sales

Account ID \*  
*Required*

Sign-on ID \*  
*Required*

Access Code \*  
*Required*

Third-party password (you will need to get this from the taxpayer)

[Cancel](#) [Scroll for More](#) [Previous](#) [Submit](#)

7. Click "Print Confirmation" if you wish to have a hard copy.
8. Click "Done" to close the confirmation window.
  - When the confirmation window closes, you will be on your My Alabama Taxes profile main screen.



### Confirmation

Your access request for [REDACTED] has been submitted and your request number is 966155680.  
Your request should be processed momentarily.

**The account should be visible the next time you sign in to MAT.**

Done

Print Confirmation

### Feedback (optional)

How easy was this process? Click "Send" to give us your feedback (this will not navigate you away from this page).



Comments

Send

9. Locate your "Exempt - Sales" Account.

10. Click on "File or View returns and periods."

My Alabama Taxes (Home) ? 👤

Welcome, Jane Doe  
You last logged in on Friday, Feb 23, 2024 8:57:38 AM  
[Manage My Profile](#)

Accounts Tasks Security Other Actions...

Filter

**Correspondence**

- > [View/Print mail from ALDOR](#)
- > [View MAT Messages](#)
- > [View my previous MAT Submissions](#)

**Registration**

- > [Manage names & addresses](#)
- > [Register additional tax types/Obtain a new tax account number](#)

**Exempt - Sales**

Account

Balance

**\$0.00**

> [File or View returns and periods](#)

Closed on 30-Sep-2024

Scroll for More

# FILING THE QUADRENNIAL REPORT

11. Locate "List of Returns."

12. Click on "File Now" to begin filing the quadrennial report.



Rollout Development Staging

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< [Redacted]

Returns Balance  
**\$0.00**  
Exempt - Sales

[Redacted]

**List of Returns** | Periods and Balances

## Returns

Return	Period	Due Date	Received Date	Status	
<a href="#">Report of Exempt Purchases</a>	<a href="#">30-Sep-2021</a>	01-Nov-2021		Delinquent	<a href="#">File Now</a>

The balances shown reflect only the accounts and filing periods shown in MAT and may not reflect your overall balance with the Alabama Department of Revenue.

13. Enter the **Fiscal Year** accounting period.

14. Enter the “NTEE Code” by clicking on the link.

15. Select whether the entity is “For Profit” or “Non-Profit.”

16. For Entities Required to File Form 990 with IRS:

- **Revenue and Expenses** (Provide Revenue reported on Line 12, and Expenses reported on Line 18 of the **most recent Form 990** filed with the IRS.)

17. For Entities **NOT** Required to File Form 990 with IRS:

- **Revenue and Expenses** (Figures should be calculated based on the entity’s **most recent accounting year.**)

### Report of Exempt Purchases

30-Sep-2021

Exempt - Sales

Rollout Development Staging

### Report of Exempt Purchases

Return

#### Report for the accounting period of:

Period Begin Date: 01-Oct-2020  
Period Ending Date: 30-Sep-2021

#### NTEE Code:

NTEE Code: P20

<http://www.nccs.urban.org/sites/all/nccs-archive/html/PubApps/search.php>

For Profit



Non-Profit



Are you required to file Form 990 with IRS?

Yes

No

Revenue: 40,477,752.00

Expenses: 41,351,279.00

#### General Sales - 4%

General Sales Purchases: 23,270,516.75

Tax: 930,820.67

#### Tax Summary

Total Purchases: 23,270,516.75

Estimated Sales and Use Tax Savings: 930,820.67

Total Estimated Tax Savings: 930,820.67

Scroll for More

18. Required for ALL Entities:

- **General Sales Purchases:** Enter purchases made at General tax rate (4 percent).
- **Automotive Purchases** made from **October 1, 2020**, through **September 30, 2021**. Enter any purchases made at the Automotive tax rate (2 percent). (If no purchases qualified for the automotive tax rate, enter "0.")
- **Farm/Manufacturing Machinery Purchases** made from **October 1, 2020**, through **September 30, 2021**. Enter any purchases made at the Farm/Manufacturing Machinery tax rate (1.5 percent). (If no purchases qualified for the Farm/Manufacturing Machinery tax rate, enter "0.")
- **Total Alabama Lodgings/Accommodations Purchases** made from **October 1, 2020**, through **September 30, 2021**. Enter the amount of exempt purchases of Alabama Lodgings/Accommodations. (If no purchases of Alabama Lodgings/Accommodations were made, enter "0.")
- **Total Purchases** made from **October 1, 2020**, through **September 30, 2021**. Enter **all purchases** made during the period **regardless of the tax rate**.

19. Click "Submit".

Are you required to file Form 990 with IRS?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Revenue	40,477,752.00	
Expenses	41,351,279.00	

<b>General Sales - 4%</b>	
General Sales Purchases	23,270,516.75
Tax	930,820.67

<b>Automotive - 2%</b>		
Do you need to report purchases?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

<b>Farm/Manufacturing Machinery - 1.5%</b>		
Do you need to report purchases?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

<b>Lodgings/Accommodations</b>		
Do you need to report purchases?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

<b>Tax Summary</b>	
<b>Total Purchases</b>	23,270,516.75
Estimated Sales and Use Tax Savings	930,820.67
Total Estimated Tax Savings	930,820.67

Cancel    Save Draft    < Previous    **Submit**

20. Enter your password at the confirmation prompt.

21. Click "OK."

The screenshot displays a software interface for 'Rollout Development Staging'. At the top, there are toggle switches for 'For Profit' (which is turned on) and 'Non-F'. Below this, a table shows 'Are you required to file Form 990 with IRS?' with 'Yes' selected, and financial data: Revenue 40,477,752.00 and Expenses 41,351,279.00. The main area is divided into sections: 'General Sales - 4%' with 'General Sales Purchases' and 'Tax' fields; 'Automotive - 2%' with a 'Do you need to report purchases?' question; 'Farm/Manufacturing Machinery - 1.5%' with a similar question; and 'Lodgings/Accommodations' with a question. A 'Tax Summary' table on the right lists values: 23,270,516.75, 930,820.67, and 930,820.67. A 'Confirmation' dialog box is overlaid, asking 'Are you sure you want to submit this request?' and 'You are required to re-enter your password to verify this request. Your password will act as your signature.' It contains a 'Password \*' field with a red border and a 'Required' label, and 'Cancel' and 'OK' buttons, with the 'OK' button also highlighted with a red border.

22. Click “Print Confirmation” and/or “Print Return” if you wish to have a hard copy.

23. Click “Done” to close the confirmation window.



⋮ Rollout Development Staging

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MAT  [My Alabama Taxes \(Home\)](#)



< Returns

### Confirmation

**Your return for 30-Sep-2021 has been submitted.**

The return will be posted to your account after your request is processed in the next couple of days.

Your request number is 2-062-949-792. If you have any difficulties, or you would like some help then please contact us at [Alabama Department of Revenue](#) website.

Done

Print Confirmation

Print Return

### Feedback (optional)

How easy was this process? Click "Send" to give us your feedback (this will not navigate you away from this page).



Comments

Send