



My Tax Account User Guide - State Debt Collection (SDC)

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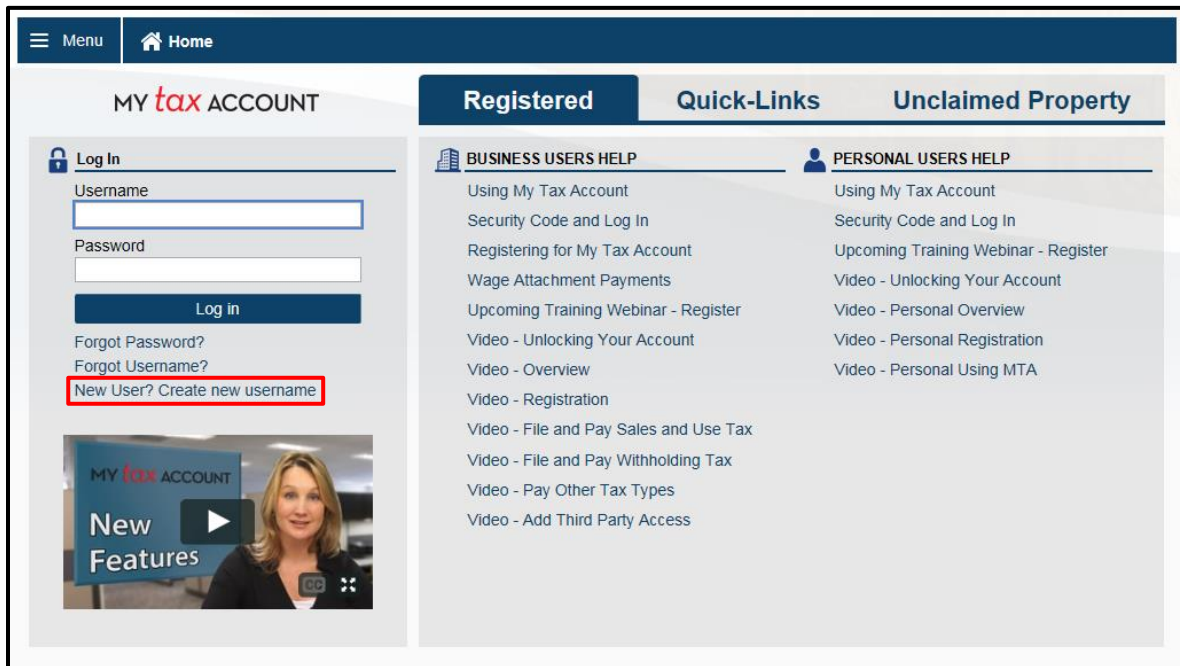
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New User Registration Process

- From the department's [home page](http://revenue.wi.gov) (revenue.wi.gov) click the My Tax Account button, or go directly to <https://tap.revenue.wi.gov>



- Click 'New User? Create new username'



My Tax Account User Guide – State Debt Collection

- Enter your profile information. Every My Tax Account user needs their own username. Enter a unique username, password and profile email address. Do not share this information with anyone else.
- Answer 'No' to the 'Are you a 3rd party preparer?' question
- Click **Next**

Menu Home » Request

To register a new business, go to the Starting a Business page.

1. Logon Information

Step 1: Enter Profile Information

Your username must be between 5-20 characters and begin with an alphanumeric character.

Your password must be between 8-20 characters and must contain a combination of letters and numbers. Passwords are case sensitive and cannot contain your username.

Your email address must be in a standard format and must not include the characters of "!" or "%". An acceptable email address format example: johndoe@business.com

Username
Required

Password
Required

Confirm Your Password
Required

Profile Email Address
Required

Confirm Your Profile Email Address
Required

First and Last Name
Required

Phone Country
USA

Phone Type
Required

Phone #
Required

Select a Secret Question
Required

Secret Question Answer
Required

Confirm Secret Question Answer
Required

Are You a 3rd Party Preparer?
Required

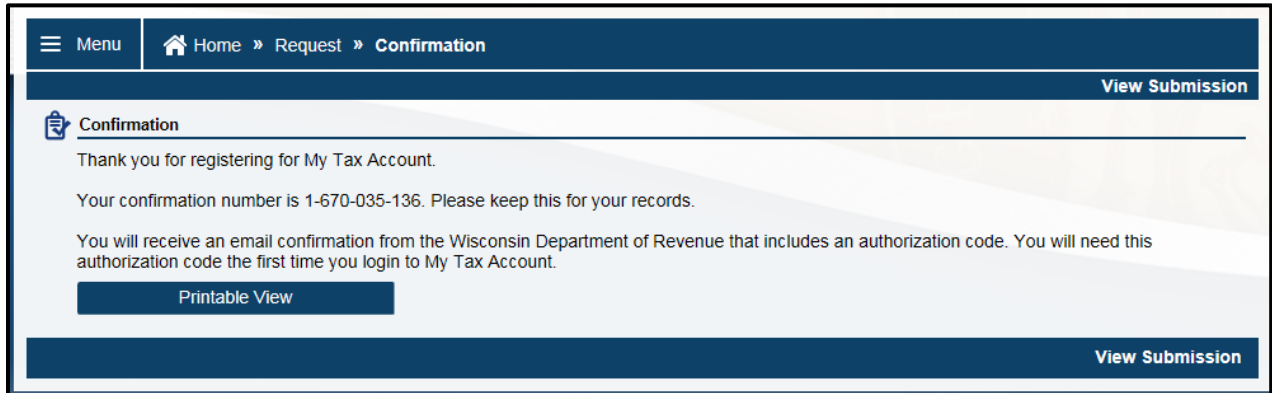
- Select ID Type and enter ID Number. ID Type options include Federal Employer Identification Number (FEIN) or Wisconsin Taxpayer Number (WTN). Use the same ID Number that was used to request the SDC account.
- Enter the Business Name using the full legal name to authenticate. State Agency names start with either Wisconsin Department or WI Department. Municipalities and county names start with type of entity, for example City of Madison or County of Dane.
- Enter zip code of business or entity
- Click **Next**

The screenshot shows the 'Request' page with the 'Customer Information' step selected. The form includes a dropdown for 'Select Id Type' with a 'Required' label, and three text input fields for 'Enter Id Number', 'Enter Customer Last or Business Name', and 'Enter Customer Zip Code', each also marked as 'Required'. Navigation buttons for 'Cancel', 'Previous', and 'Next' are visible at the bottom.

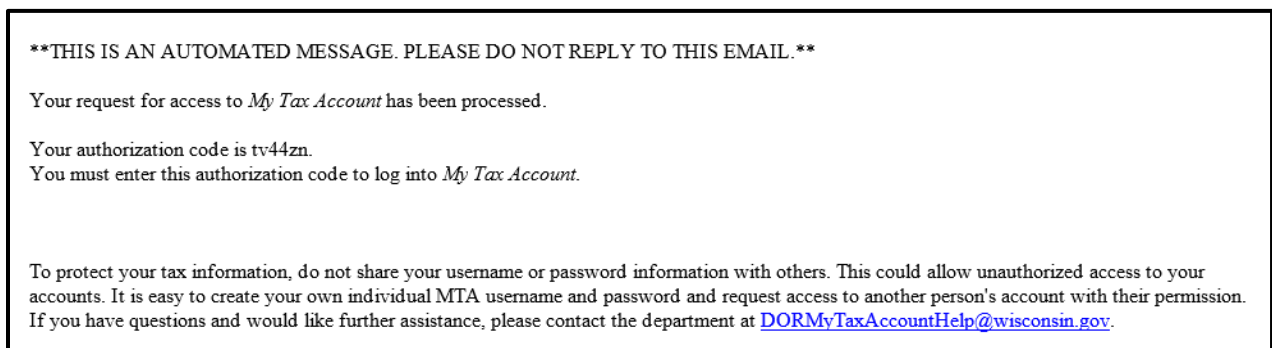
- Skip 'Step 3: Account Access (Optional)' by clicking 'Submit' and then 'Agree'

The screenshot shows the 'Request' page with the 'Account Access' step selected. The form provides instructions on registering for one tax type (Sales or Withholding) and lists conditions for completion or skipping. It features a dropdown for 'Select Tax Account Type', a text input for 'Total tax due from prior return or deposit reports' (pre-filled with 0.00), and another text input for 'Letter Id'. Navigation buttons for 'Cancel', 'Previous', and 'Submit' are at the bottom.

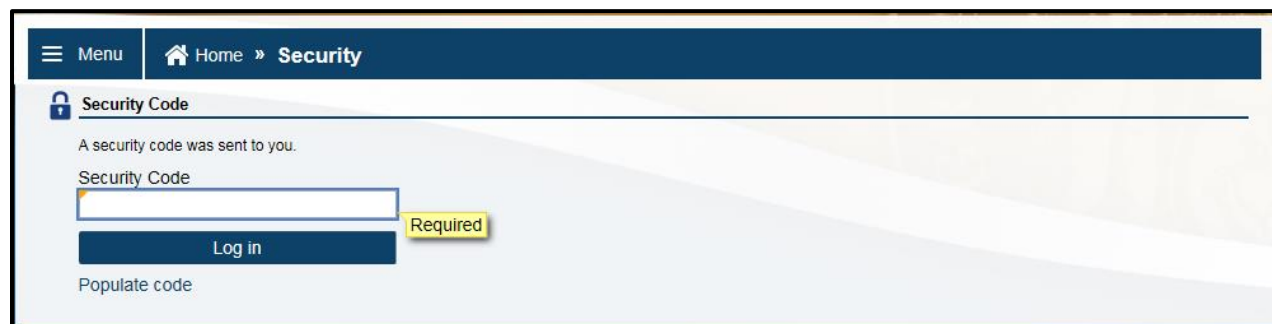
- A confirmation page appears stating that an authorization code will be sent by email. Enter this code the first time you log in to My Tax Account.



- The email looks like this:



- Log into My Tax Account by entering your username and password. This brings up the Security Code screen. Enter the security code you received in the email and click **Log In**.



- Update information on the 'My Profile' page, including Authentication information. This is required to receive a security code the next time you log in. We recommend that you select the 'Send text or email' authentication type. If one method doesn't work, you have an alternative method of receiving your security code. Click **Save** when finished.

The screenshot shows the 'My Profile' page with the following details:

- Profile Information:** Username: testuser01; Name: TEST USER; Profile Email: EMAILADDR@GMAIL.COM; Secret Question: What is the name of your first pet?; Change Secret Question link.
- Primary Phone Number:** Country: USA; Type: Business; Phone Number: (608) 555-5555; Extension: (empty).
- Secondary Phone Number:** Country: USA; Type: (empty).
- Authentication:** Authentication Type: Send text or email; Security Email: Required; Country: USA; Cellular Carrier: Required; Cell Phone: Required.
- What You Should Know:**
 - Security Contact email and/or cell phone may be different from your Profile Information
 - Your Security Contact email can be used for multiple My Tax Accounts
 - If your cellular carrier is not listed, select email option
 - Standard message and data rates may apply if text option selected

Add SDC Account

- Once you have completed these steps, contact either Roxy Walker or Joseph Mugenga to add your SDC account to your My Tax Account profile. Email trip@wisconsin.gov or call 608-264-0344.

My Tax Account for SDC

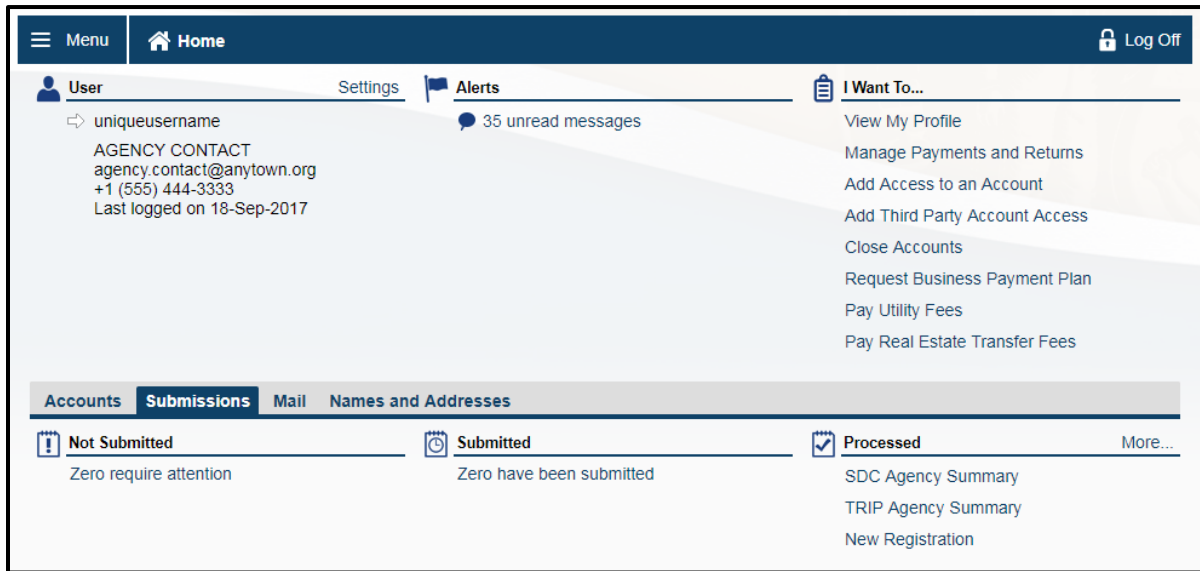
Home Page

- **Accounts Tab:** This tab displays the Account Types you are authorized to access through your My Tax Account profile

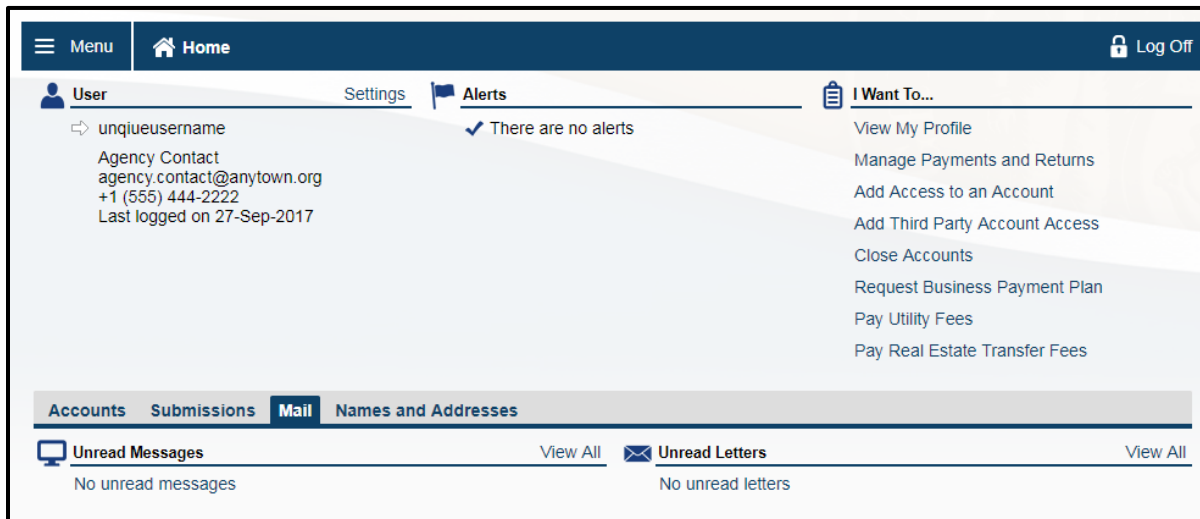
The screenshot displays the 'Home' page of a My Tax Account. At the top, there is a navigation bar with 'Menu', 'Home', and 'Log Off'. Below this, the user profile is shown with the name 'User', a unique username, agency contact information, and the last login date. The 'Alerts' section indicates 'There are no alerts'. The 'I Want To...' section lists various actions like 'View My Profile', 'Manage Payments and Returns', etc. The 'Accounts' tab is selected, showing a table with one account entry.

| Account Type | Account Id | Name | Frequency | Balance |
|--------------|------------|------------------|-----------|---------|
| SDC | 999-999 | CITY OF WHEREVER | | \$0.00 |

- **Submissions Tab:** Every action in My Tax Account is viewed as a submission
 - Submissions are listed as submitted immediately after you successfully file them
 - Submissions are processed at 4:00 PM CST each business day and can be changed or withdrawn while still in submitted status
 - Submissions may be cancelled by selecting the specific submission and then clicking the **Withdraw** button
 - If your submission is in the 'Processed' column it can no longer be withdrawn or changed
 - To view your recent submission filing history, click on the **Submissions** tab
 - To view a complete history of your submissions, click **More...**



- **Mail Tab:** Various reports and department communications are available from this tab on a monthly basis
 - Agency Summary and Return files are available on the first business day of each month.
 - Transaction files are available on the second business day of each month
 - You can use the **Filter** functionality to search for a specific notice or notice type

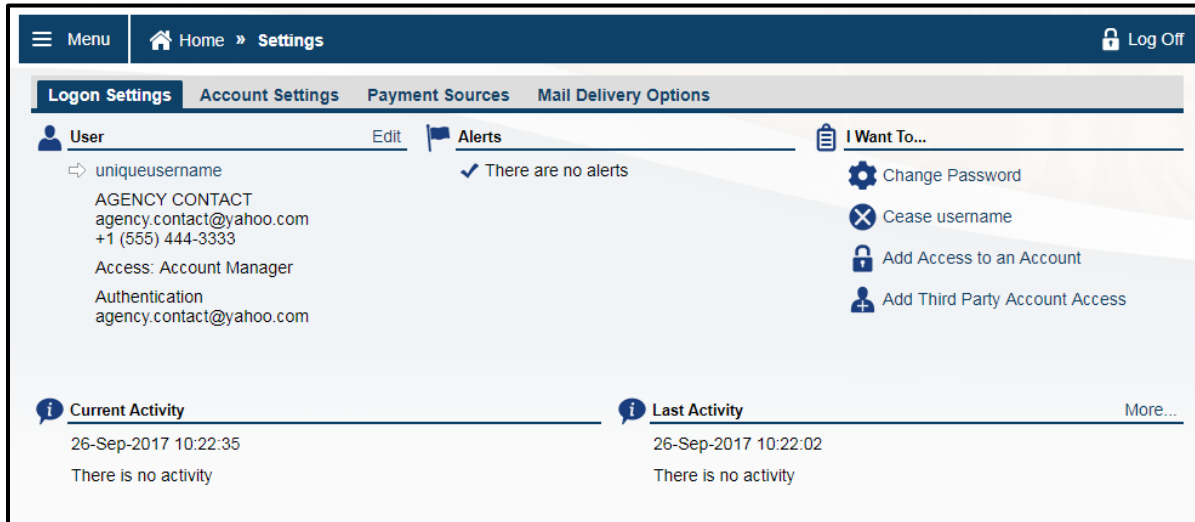


- **Names and Addresses Tab:** This tab displays the legal name and address for the agency
 - Click **Add** across from Name to create a request to add a 'Doing Business As (DBA)' name
 - Click **Add** across from Address to create a request to change your address

| Entity | | Customer Names and Addresses | |
|------------------------------|--|------------------------------|--|
| 39-9999999 | | Name | Add |
| ANYTOWN | | Name | ANYTOWN |
| 222 W MAIN ST | | Address | Add |
| <u>ANYTOWN WI 55555-4444</u> | | Address | 222 W MAIN ST <u>ANYTOWN WI 55555</u> |

View My Profile

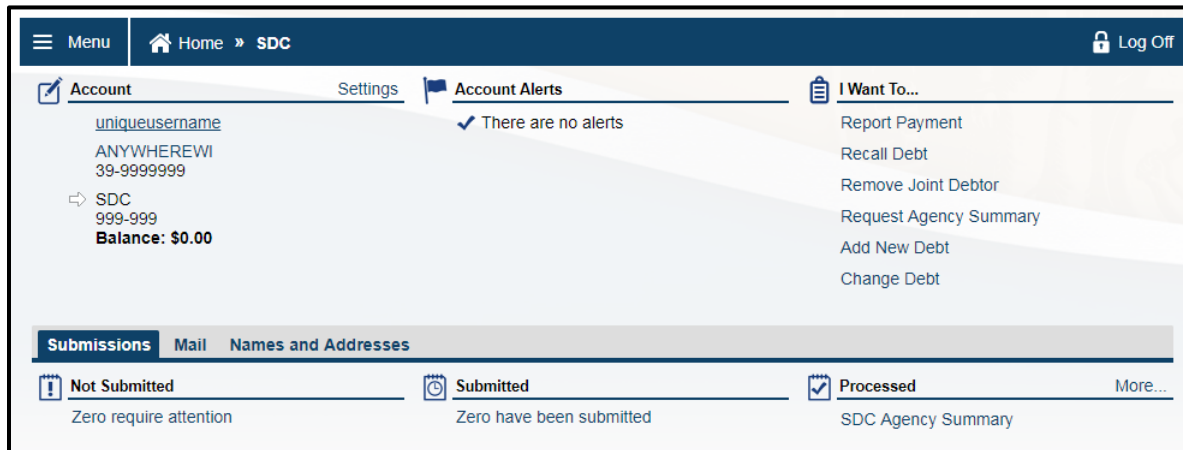
- From your home page, click **View My Profile**



- Under 'I Want To...' you have a number of options:
 - **Change Password:** Allows the user to update their password. We recommend that you update your password every 60 days.
 - **Add Access to an Account:** This functionality is not used in your SDC account. If you need to add access to your SDC Account, call 608-264-0344 or email trip@wisconsin.gov.
 - **Add Third Party Account Access:** This functionality is not used in your SDC account. If you need to add access to an account, call 608-264-0344 or email trip@wisconsin.gov.

Managing Your SDC Account

- Click on the SDC **Account Type** to access the SDC account menu options
- The **Account Summary** tab displays your agency information



Report Payment

- DOR prefers that all payments are made by the debtor directly to the department, but we also recognize that some debtors will remit payment to the referring agency.
- If you receive a partial payment, send the amount received to DOR. We will apply the payment, adjust the balance and send a balance statement to the debtor. You will receive your portion of the proceeds in the following monthly remittance.

Note: If the debtor sends you a check, send it to DOR. We will apply the payment to the debt and endorse the check appropriately.

- DO NOT submit a **Recall Debt** transaction if you receive payment. **Recall Debt** should only be used if you sent the debt in error.
- DO NOT submit a **Change Debt** transaction to adjust the amount of the debt. This will cause an adjustment to the collection fee and any interest calculated to date. Use **Change Debt** only if you sent the wrong debt amount to DOR for collection.
- If you receive the total amount due, including the DOR collection fee, report the payment through My Tax Account or through the New Debt/Debt Update File (transaction type 4). Send us the full amount or the fee amount.
 - Send a check for the collection fee to:
MS 4-206
Wisconsin Department of Revenue
PO Box 8901
Madison, WI 53708-8901

- Select **Report Payment** under 'I Want To...' at the upper right of the SDC account page
- Choose an **ID Type**. The default choice is Social Security Number, but Federal Employer's ID Number (FEIN) and Driver's License Number (DLN) are other valid options.
- Enter the **ID** number and click **Enter**

Menu Home » SDC » Request Log Off

Submit Cancel

Search

State Debt Collection (SDC) Debt Search

Id Type Social Security Number

Id Required

Required

Search Results Filter

| Debt Id | Agency Amt | DOR Amt | Last Name | First Name |
|---------|------------|---------|-----------|------------|
|---------|------------|---------|-----------|------------|

Submit Cancel

FILING TIPS
For your request to be complete, you need to select the debt to recall by clicking on the Debt Id link.

- Click on the Debt ID link

Menu Home » SDC » Request Log Off

Submit Cancel

Search

State Debt Collection (SDC) Debt Search

Id Type Social Security Number

Id ***-**-5957

Search Results Filter

| Debt Id | Agency Amt | DOR Amt | Last Name | First Name |
|-------------|------------|---------|-----------|------------|
| 204-15-1634 | 673.75 | 774.81 | PAYER | TAX |

Submit Cancel

FILING TIPS
For your request to be complete, you need to select the debt to recall by clicking on the Debt Id link.

- Enter the amount of the payment and click **Submit**

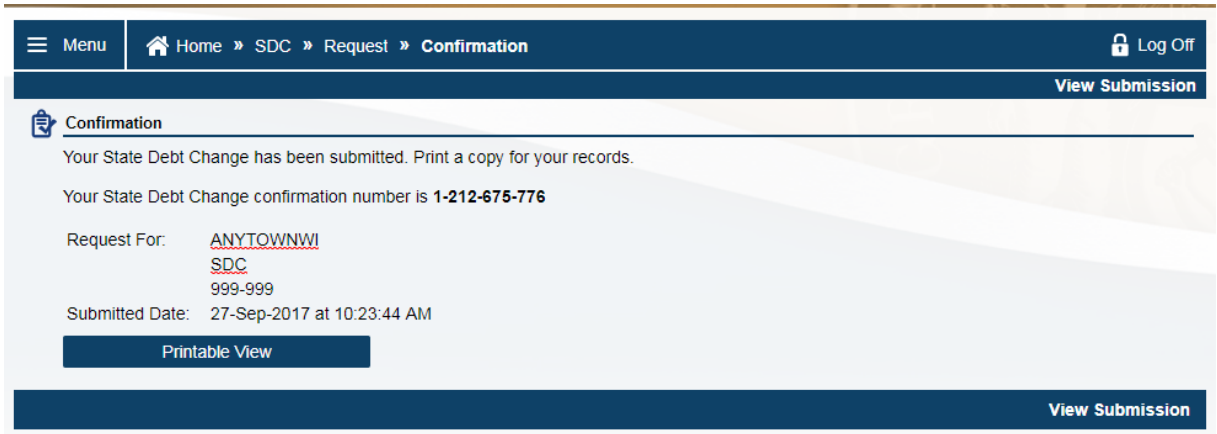
Menu Home » SDC » SDC Change/Pay/Recall Log Off

Search Payment

Payments 0.00

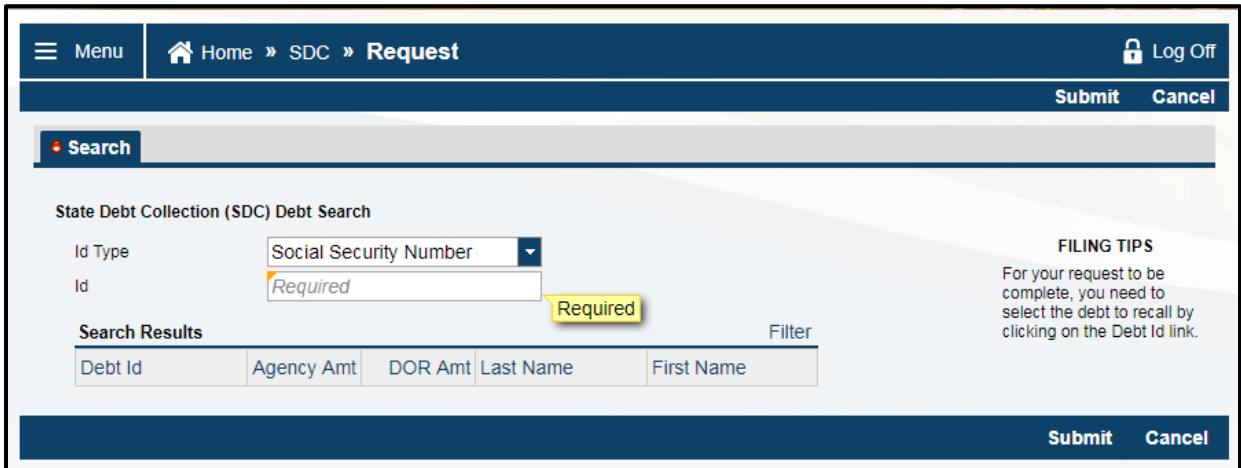
Minimum Balance

SDC User Guide
Debtors should make all payments directly to Department of Revenue.
If you receive a payment, report the amount online and send DOR a check for the payment amount.



Recall Debt

- Select **Recall Debt** under 'I Want To...' at the upper right of the SDC account page
- Choose an ID Type. The default choice is Social Security Number, but Federal Employer's ID Number (FEIN) and Driver's License Number (DLN) are other valid options.
- Enter the **ID** number and click **Submit**
 - DO NOT use the **Recall Debt** transaction if you received a payment. Recall Debt should only be used if you sent the debt to DOR in error.



- Select the debt you want to recall by clicking the Debt ID and **Submit**

The screenshot shows the 'Request' page for State Debt Collection (SDC). The breadcrumb trail is 'Home » SDC » Request'. There are 'Submit' and 'Cancel' buttons at the top right and bottom right. A search bar is present. Below it, the 'State Debt Collection (SDC) Debt Search' section has a dropdown for 'Id Type' set to 'Social Security Number' and an input field for 'Id' containing '***-**-7144'. To the right, a 'FILING TIPS' box states: 'For your request to be complete, you need to select the debt to recall by clicking on the Debt Id link.' Below the search fields is a table of search results with columns: Debt Id, Agency Amt, DOR Amt, Last Name, and First Name. The table contains four rows of data. At the bottom, there are 'Submit' and 'Cancel' buttons.

| Debt Id | Agency Amt | DOR Amt | Last Name | First Name |
|-------------|------------|---------|-----------|------------|
| 204-16-0344 | 250.00 | 0.00 | PAYER | TAX |
| 204-16-0668 | 250.00 | 287.50 | PAYER | TAX |
| 204-16-0669 | 250.00 | 287.50 | PAYER | TAX |
| 204-16-0827 | 250.00 | 287.50 | PAYER | TAX |

Remove Joint Debtor

- Select **Remove Joint Debtor** under 'I Want To...' at the upper right of the SDC account page
- Choose an ID Type. The default choice is Social Security Number, but Federal Employer's ID Number (FEIN) and Driver's License Number (DLN) are other valid options.
- Enter the **ID** number and click **Submit**
 - To remove the primary debtor you must use **Recall Debt**

This screenshot is similar to the previous one but shows an error state. The 'Id' input field is empty and has a yellow 'Required' error message next to it. The 'Search Results' table is currently empty. The 'FILING TIPS' box and navigation buttons remain the same.

Request Agency Summary

- Select **Request Agency Summary** under 'I Want To...' at the upper right of the SDC account page
- Choose a **File Type**. Choices include:
 - MTA-CSV: Opens in MS Excel, formatted
 - MTA-TXT: Opens in MS Notepad, unformatted
 - sFTP - Flat File: Sent using the flat file layout through DOR's secure portal
 - sFTP-XML: Sent using the SML file layout through DOR's secure portal
- Click **Submit**

The screenshot shows a web interface for requesting an agency summary. At the top, there is a navigation bar with a 'Menu' icon, a breadcrumb trail 'Home » SDC » Request', and a 'Log Off' button. Below the navigation bar, there are 'Submit' and 'Cancel' buttons. The main content area has a header 'Agency Summary' and a sub-header 'Agency Summary'. There is a 'File Type' dropdown menu currently set to 'sFTP - XML'. To the right, there is a link for 'SDC User Guide'. At the bottom of the form, there are 'Submit' and 'Cancel' buttons.

The screenshot shows a confirmation page. At the top, there is a navigation bar with a 'Menu' icon, a breadcrumb trail 'Home » SDC » Request » Confirmation', and a 'Log Off' button. Below the navigation bar, there is a 'View Submission' button. The main content area has a header 'Confirmation' with a printer icon. The text reads: 'Your SDC Agency Summary has been submitted. Print a copy for your records.' Below this, it says 'Your SDC Agency Summary confirmation number is 0-675-804-864'. There is a section for 'Request For:' with the details 'ANYTOWNWI', 'SDC', and '999-999'. Below that, it says 'Submitted Date: 27-Sep-2017 at 10:56:31 AM'. At the bottom of the main content area, there is a 'Printable View' button. At the very bottom of the page, there is a 'View Submission' button.

Add New Debt

- Select **Add New Debt** under 'I Want To...' at the upper right of the SDC account page

The screenshot shows a web interface for adding new debt. At the top, there is a navigation bar with a 'Menu' icon, a breadcrumb trail 'Home » SDC » Request', and a 'Log Off' button. Below the navigation bar, a section titled '1. Customer Information' is highlighted. The form itself is titled 'Customer Information' and contains the following fields:

- Business or Primary Debtor:** A dropdown menu with 'Individual' selected.
- Id Type:** A dropdown menu with 'Social Security Number' selected.
- Id:** A text input field with a 'Required' label.
- Agency Id (AIN):** A text input field with a 'Required' label.
- Last Name:** A text input field with a 'Required' label.
- First Name:** A text input field with a 'Required' label.
- Middle Initial:** A text input field.
- Street:** A text input field with a 'Required' label.
- Unit Type:** A dropdown menu.
- Unit:** A text input field.
- City:** A text input field with a 'Required' label.
- State:** A dropdown menu with a 'Required' label.
- ZIP Code:** A text input field with a 'Required' label.
- County:** A text input field.
- Phone Number:** A text input field.
- Cell Phone Number:** A text input field.

At the bottom of the form, there is a checkbox labeled 'Add Joint Debtor'.

Customer Information

- The **Business or Primary Debtor** field is tied to the **ID Type** that you select
 - If you select an **ID Type** of Social Security Number (SSN) or Driver's License Number (DLN), this field is populated with Individual
 - If you select an **ID Type** of Federal Employer ID Number (FEIN), this field is populated with Business
 - DOR performs a match on the name and identifier you enter on this page. It is important to note that an individual can operate a business.
 - Use these clues to help you determine how you should refer these types of debts:
 - Individual: A person or a person operating a business as a sole proprietor or single-member Limited Liability Corporation (LLC). Select an **ID Type** of SSN or DLN. The **Last Name** and **First Name** fields are required. The **DBA Name** is the business or trade name of the business the individual is operating
 - Business: An entity organized as a corporation or LLC. Select an **ID Type** of FEIN. The **Business Name** field is required. The **DBA Name** is the business or trade name of the business
 - Examples:
 - Joe Debtor: Select an **ID Type** of SSN or DLN
 - Joe Debtor doing business as Joe's Bar and Grill: Select an **ID Type** of SSN or DLN
 - Debtor Enterprises, Inc.: Select an **ID Type** of FEIN
 - Joe's Bar and Grill, LLC: Select an **ID Type** of FEIN
- The **Agency ID (AIN)** field is the unique ID assigned by your agency to the debtor that is not the SSN. This field is required.
- The **Street, Apt/Unit** (if applicable), **City, State** and **Zip Code** fields are required. The remaining fields are optional. My Tax Account performs active validation against USPS address information. To troubleshoot 'Invalid Address' errors use online tools such as USPS Zip code lookup https://tools.usps.com/go/ZipLookupAction_input or a web search to correct address for submission.
- **Add Joint Debtor** checkbox: Check this box if the debt is jointly owned. For example, by a husband and wife or roommates sharing a utility.
- Click **Next**

Joint Debtor Information

- A joint debt can only be submitted for individuals. Once the primary debtor information is entered you may add a joint debtor (another individual). If you select an ID Type of FEIN, the 'Add Joint Debtor' checkbox is not displayed. If a business is operating as a sole proprietor, certify the individual who is the owner.

Debt Information

- **Debt ID**
- **Debt Assessment Date**
- Amount Fields:
 - **Debt Principal:** The amount of the unpaid debt. If you assess interest, this is the basis upon which interest is calculated
 - **Interest Rate:** Enter as a decimal. If your rate is 12%, enter as .1200
 - **Debt Interest:** The amount of interest accrued through the referral date
 - **Debt Penalty:** Any other amount assessed that should not be included in the principal field
 - **Estimate check box:**
 - **Debt Original Amount:**
 - **Debt Title Description:**
 - **Debt Description:**
- Click **Submit** when finished

The screenshot shows a web application interface for entering debt information. At the top, there is a navigation bar with 'Menu', 'Home » SDC » Request', and 'Log Off'. Below this, a breadcrumb trail shows '1. Customer Information' and '2. Debt Information'. The main section is titled 'Debt Information' and contains the following fields:

- Debt Id:** A text input field with a 'Required' label.
- Debt Assessment Date:** A date input field with a 'Required' label.
- Debt Principal:** A numeric input field with a value of 0.00.
- Interest Rate:** A numeric input field with a value of 0.0000.
- Debt Interest:** A numeric input field with a value of 0.00.
- Interest To Date:** A date input field.
- Debt Penalty:** A numeric input field with a value of 0.00.
- Estimate:** A checkbox that is currently unchecked.
- Debt Original Amount:** A numeric input field with a value of 0.00.
- Debt Title Description:** A text input field with a 'Required' label.
- Debt Description:** A larger text area for additional details.

At the bottom of the form, there are three buttons: 'Cancel', '< Previous', and 'Submit'.

Change Debt

- Select **Change Debt** under 'I Want To...' at the upper right of the SDC account page
- Enter the ID type and ID number that corresponds to the originally submitted debt. Use the same ID Type and ID number you used when adding the new debt. For example if you added the debt using the DLN, your Debt Summary request must use the DLN.
- Click **Submit**

Menu Home » SDC » Request Log Off

Submit Cancel

Search

State Debt Collection (SDC) Debt Search

Id Type Social Security Number

Id Required

Required

FILING TIPS
For your request to be complete, you need to select the debt to recall by clicking on the Debt Id link.

Search Results Filter

| Debt Id | Agency Amt | DOR Amt | Last Name | First Name |
|---------|------------|---------|-----------|------------|
|---------|------------|---------|-----------|------------|

Submit Cancel