Wisconsin Department of Revenue

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

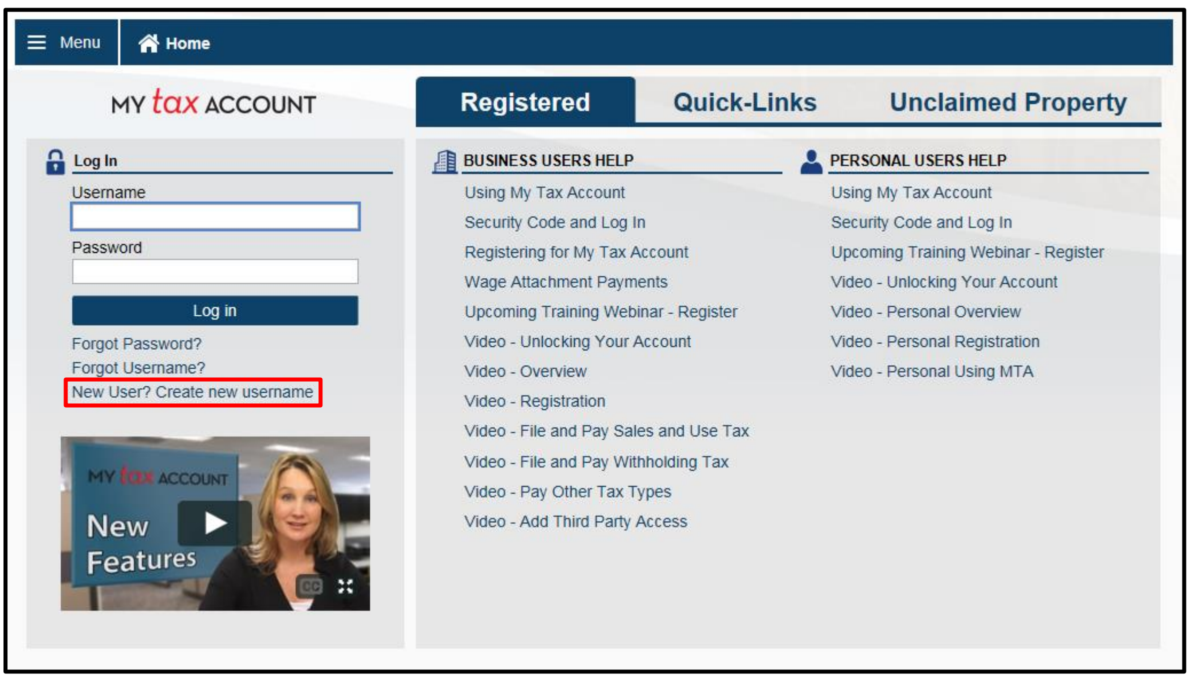
R. 2-18

Table of Contents

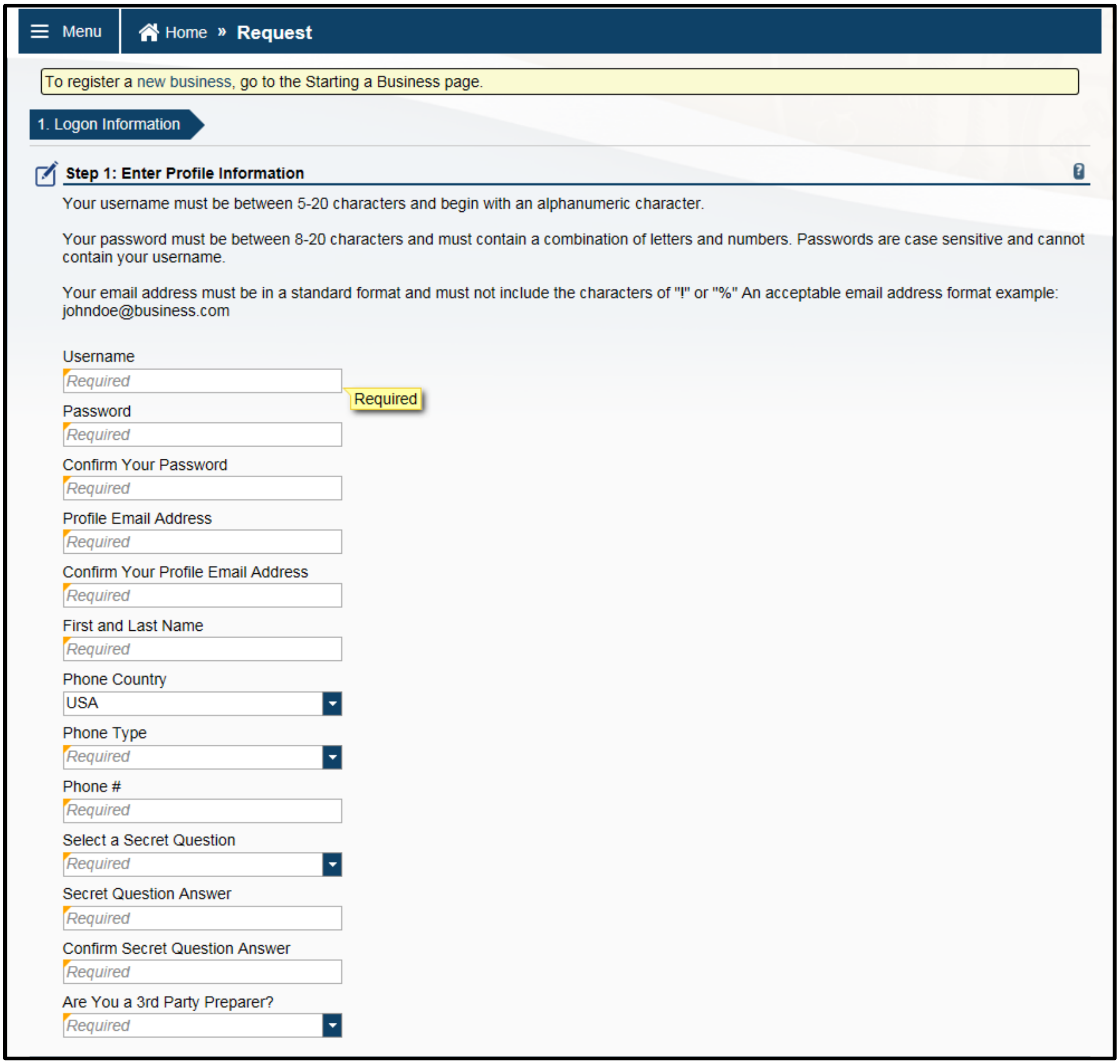
New User Registration Process

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

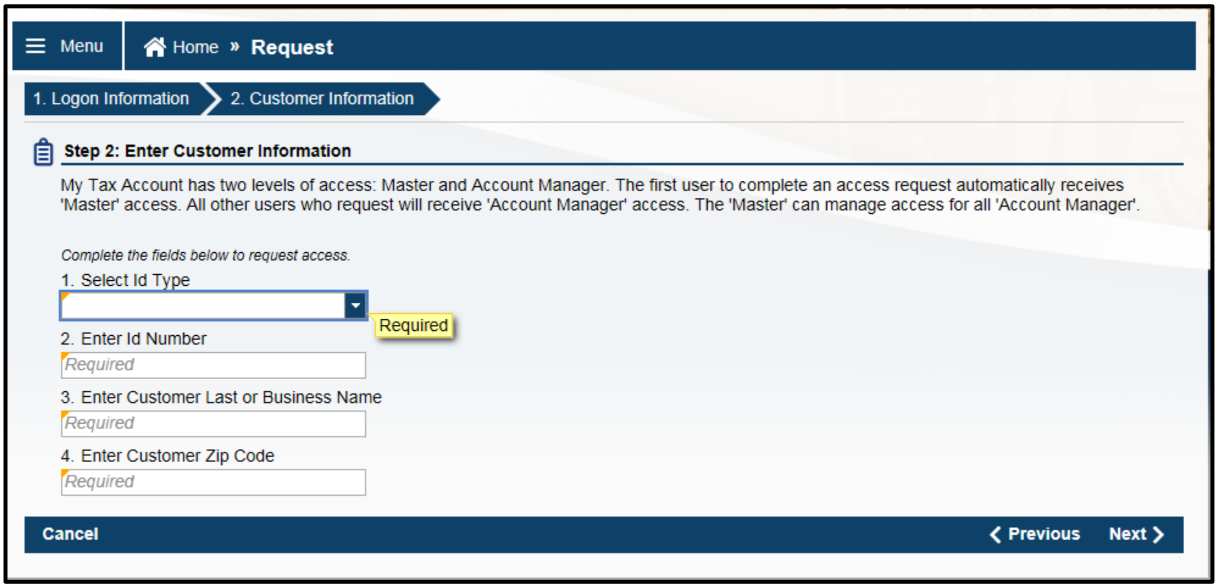
- Click 'New User? Create new username'



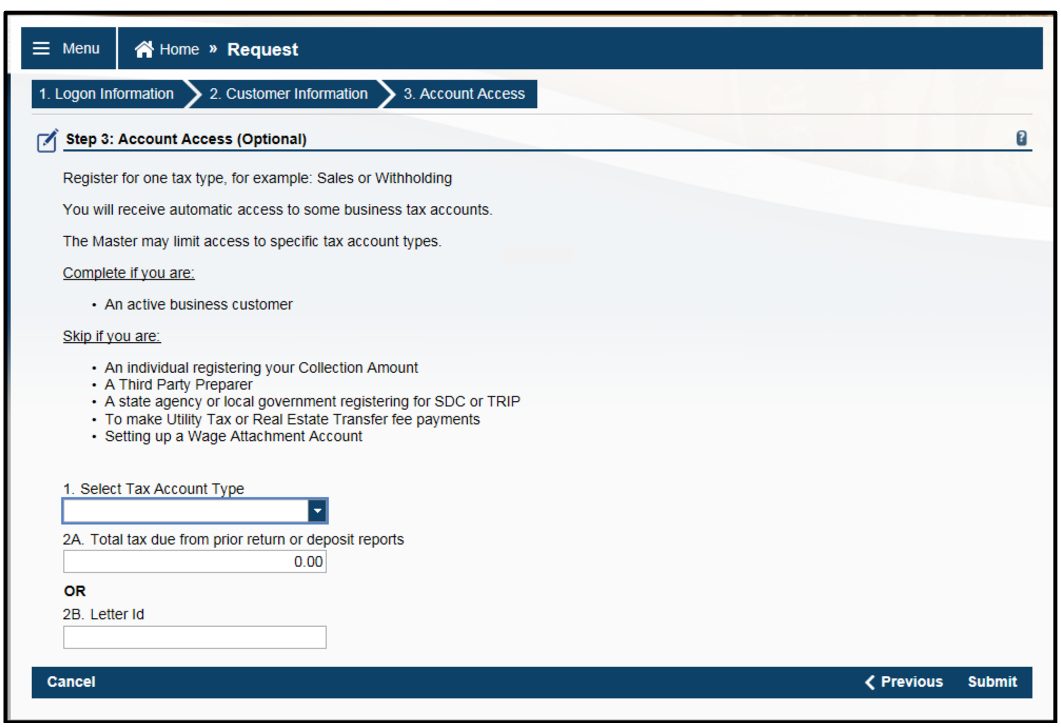
- Enter your profile information. Every My Tax Account user needs their own username. Enter a unique username, password and profile email address. Do not share this information with anyone else.
- Answer 'No' to the 'Are you a 3rd party preparer?' question
- Click **Next**



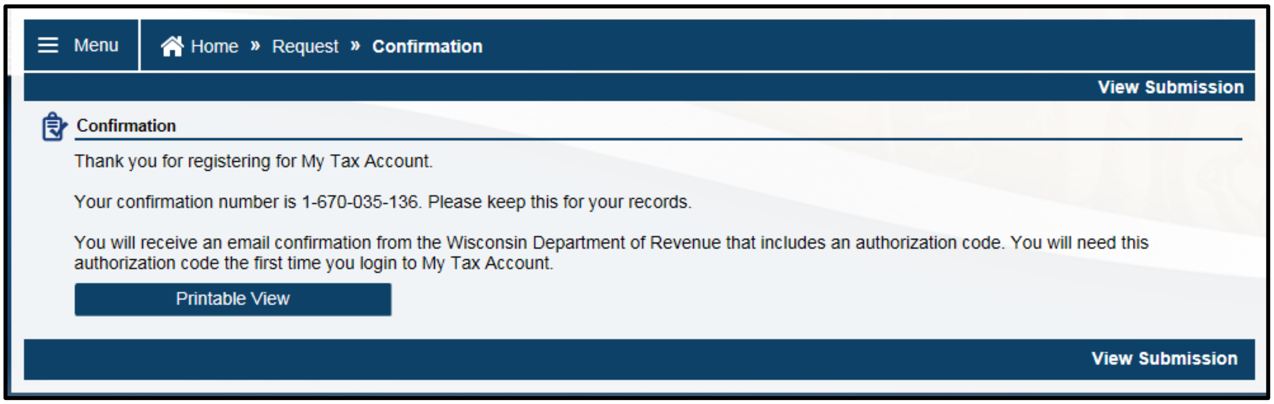
- Select ID Type and enter ID Number. ID Type options include Federal Employer Identification Number (FEIN) or Wisconsin Taxpayer Number (WTN). Use the same ID Number that was used to request the SDC account.
- Enter the Business Name using the full legal name to authenticate. State Agency names start 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**



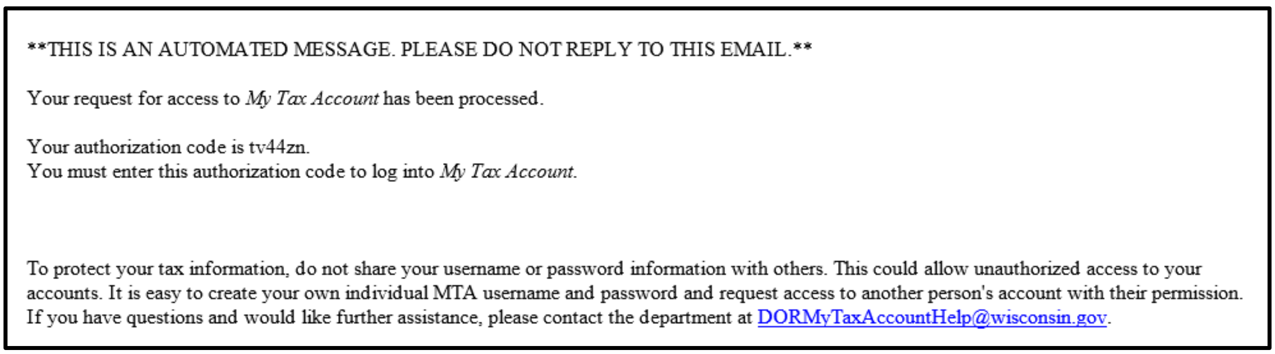
- Skip 'Step 3: Account Access (Optional)' by clicking 'Submit' and then 'Agree'



- 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:



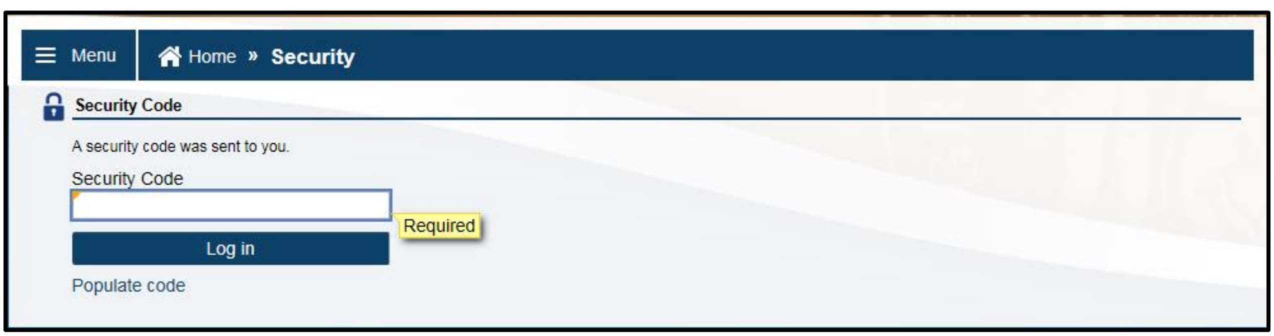
THIS IS AN AUTOMATED MESSAGE. PLEASE DO NOT REPLY TO THIS EMAIL.

Your request for access to *My Tax Account* has been processed.

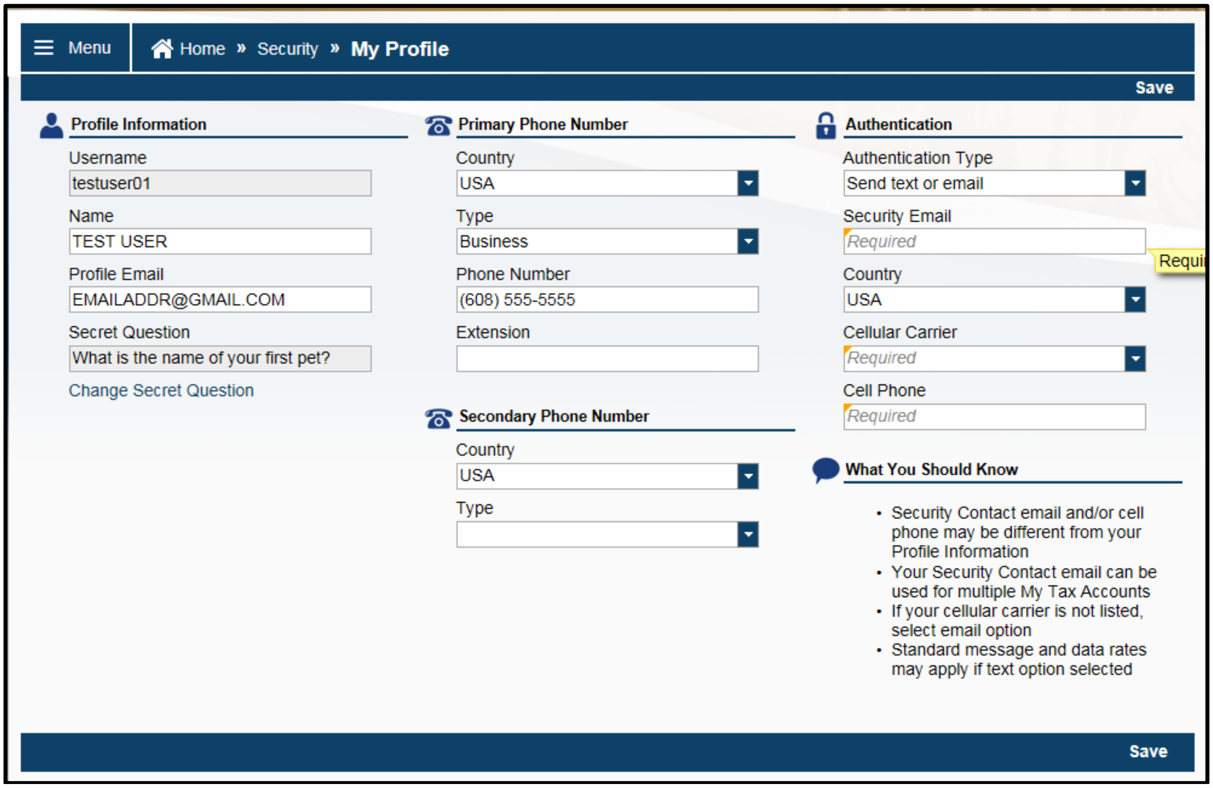
Your authorization code is tv44zn.
You must enter this authorization code to log into *My Tax Account*.

To protect your tax information, do not share your username or password information with others. This could allow unauthorized access to your accounts. It is easy to create your own individual MTA username and password and request access to another person's account with their permission. If you have questions and would like further assistance, please contact the department at DORMyTaxAccountHelp@wisconsin.gov.

- 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.



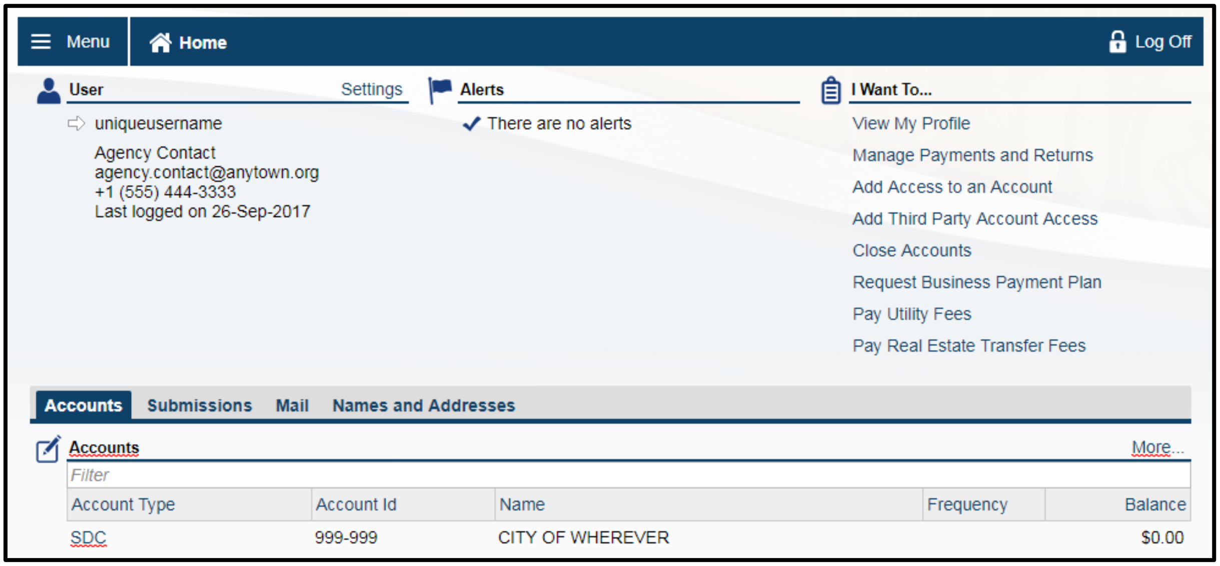
Add SDC Account

- 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.

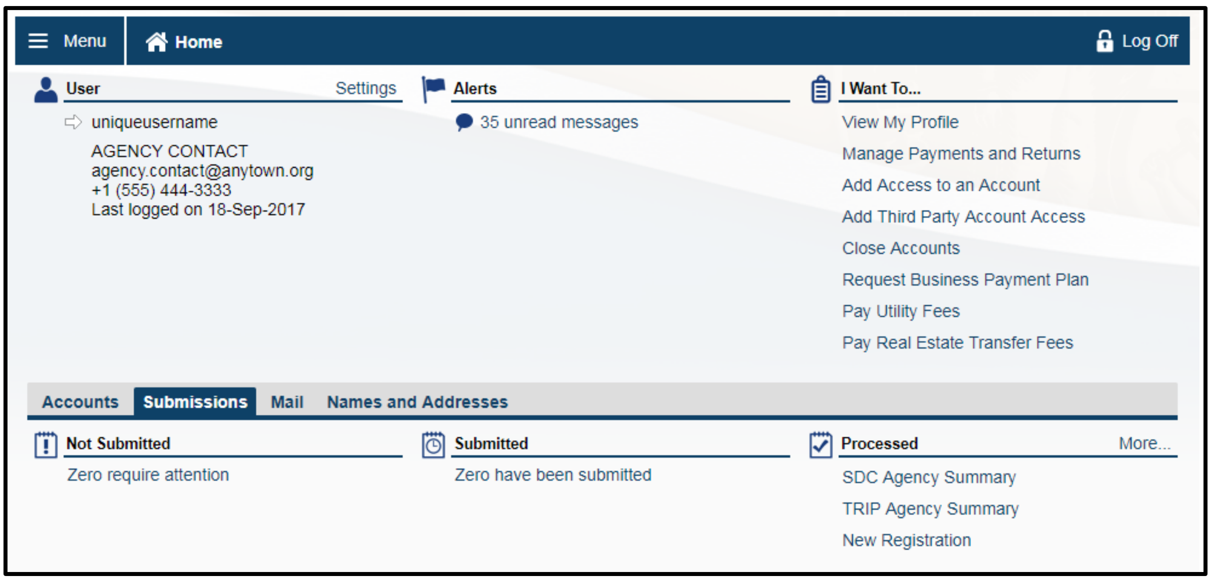
My Tax Account for SDC

Home Page

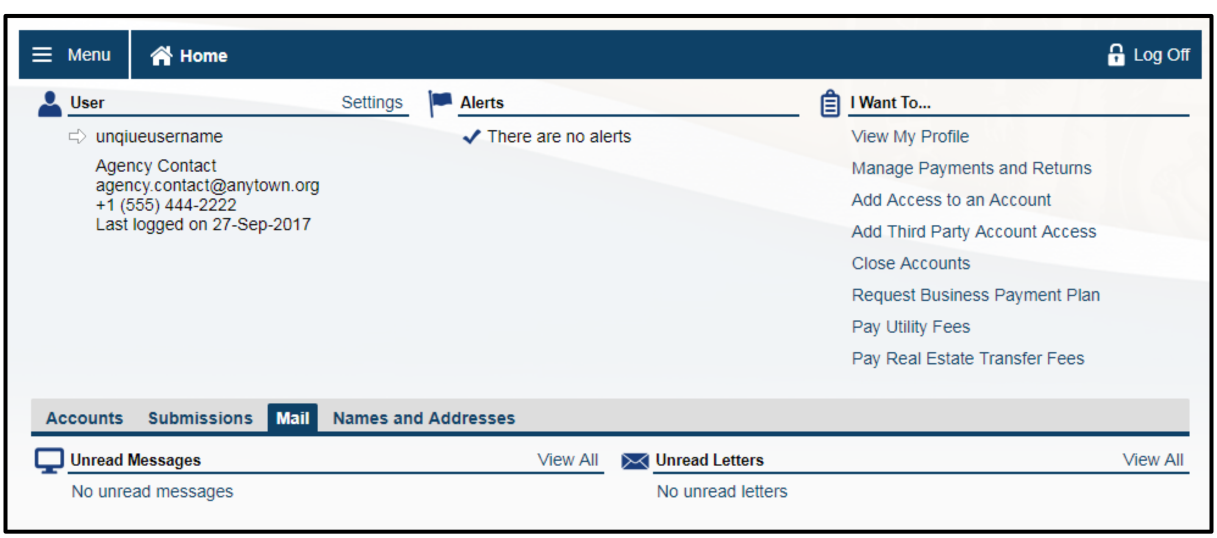
- **Accounts Tab:** This tab displays the Account Types you are authorized to access through your My Tax Account profile



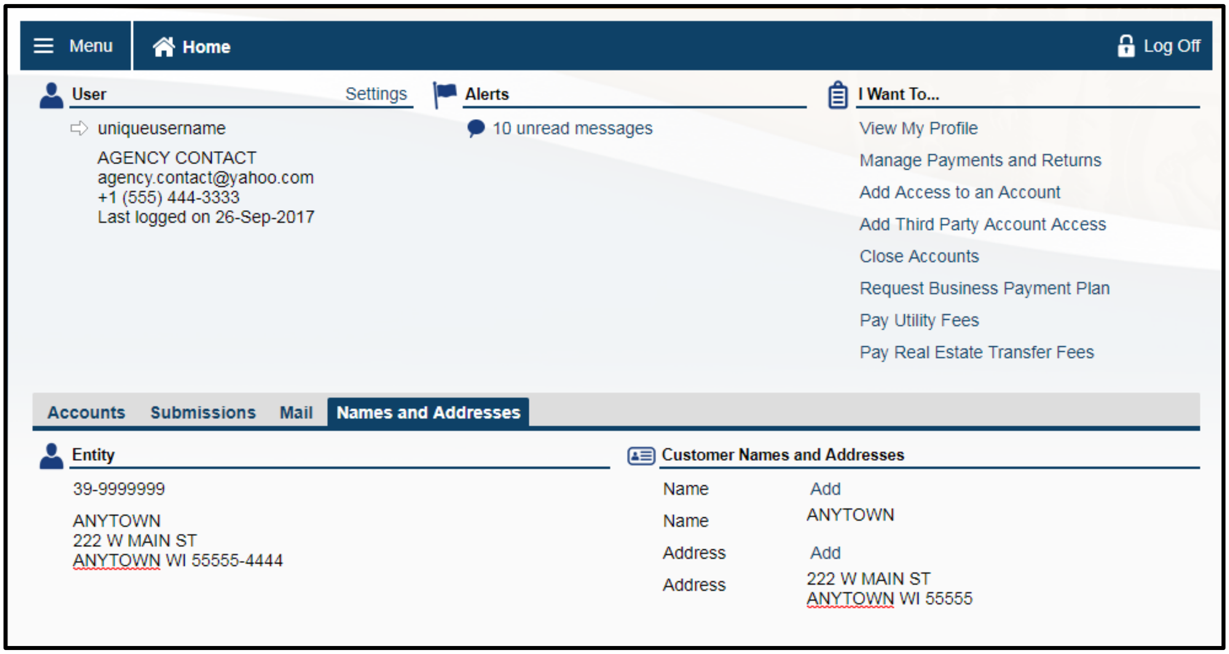
- **Submissions Tab:** Every action in My Tax Account is viewed as a submission
  - Submissions are listed as submitted immediately after you successfully file them
  - Submissions are processed at 4:00 PM CST each business day and can be changed or withdrawn while still in submitted status
  - Submissions 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

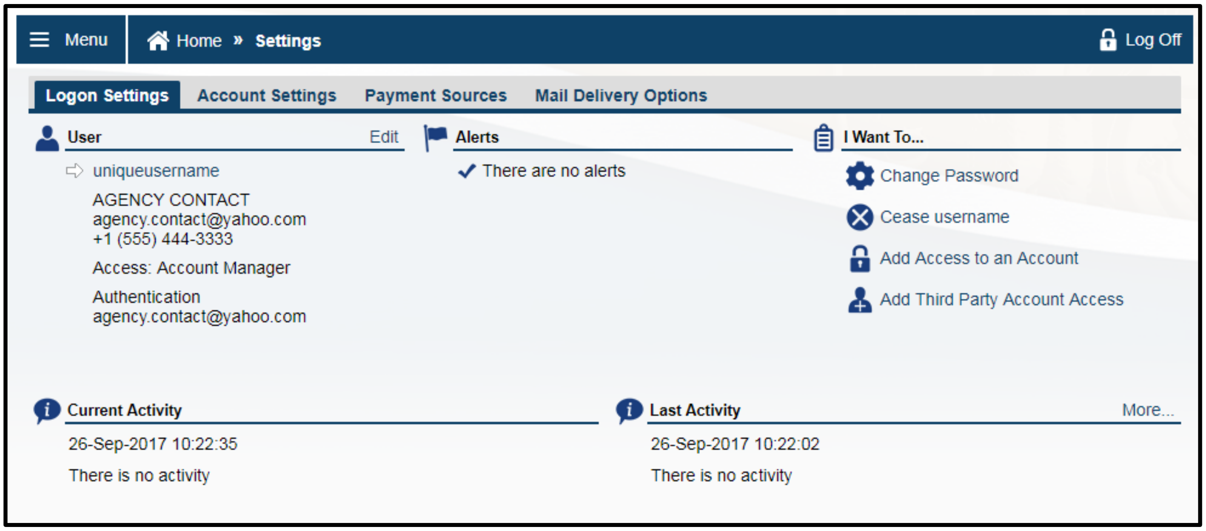


- **Names and Addresses Tab:** This tab displays the legal name and address for the agency
  - Click **Add** across from Name to create a request to add a 'Doing Business As (DBA)' name
  - Click **Add** across from Address to create a request to change your address



View My Profile

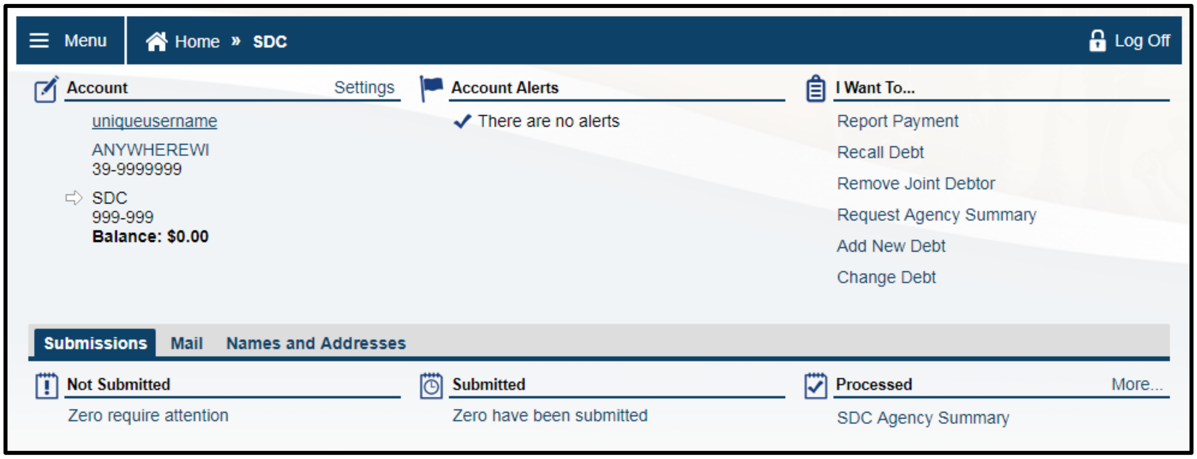
- From your home page, click **View My Profile**



- 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

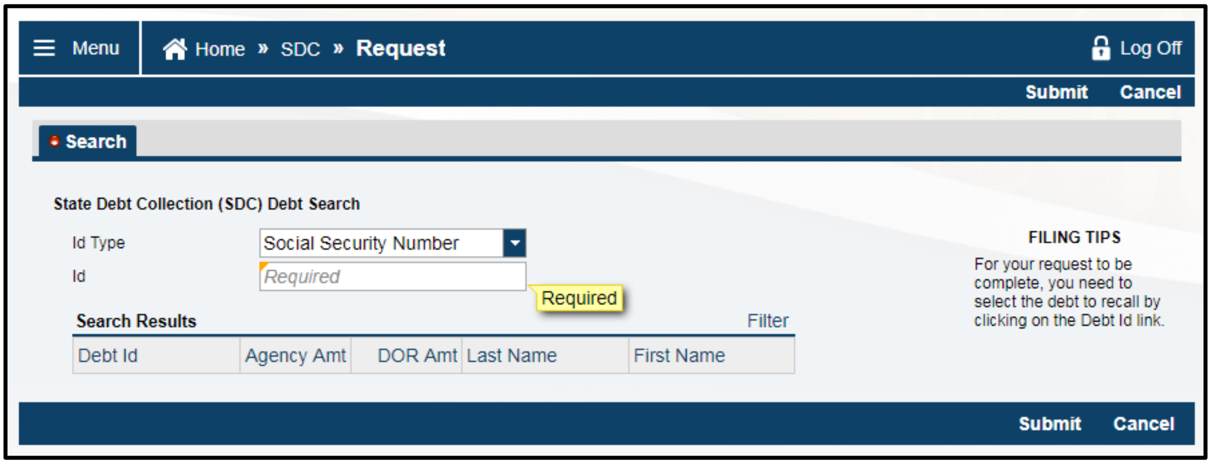
- Click on the SDC **Account Type** to access the SDC account menu options
- The **Account Summary** tab displays your agency information



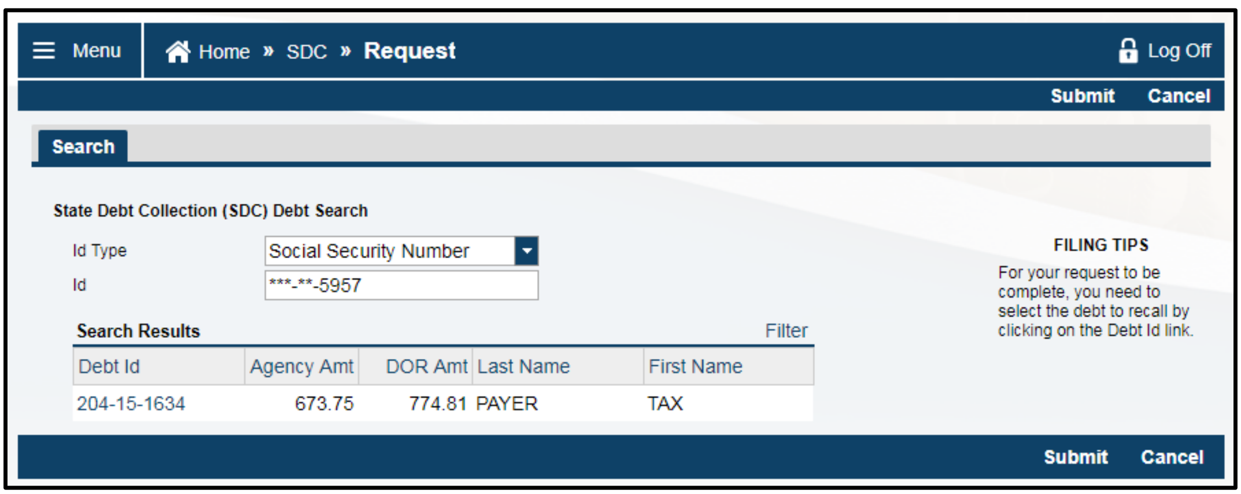
Report Payment

- 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

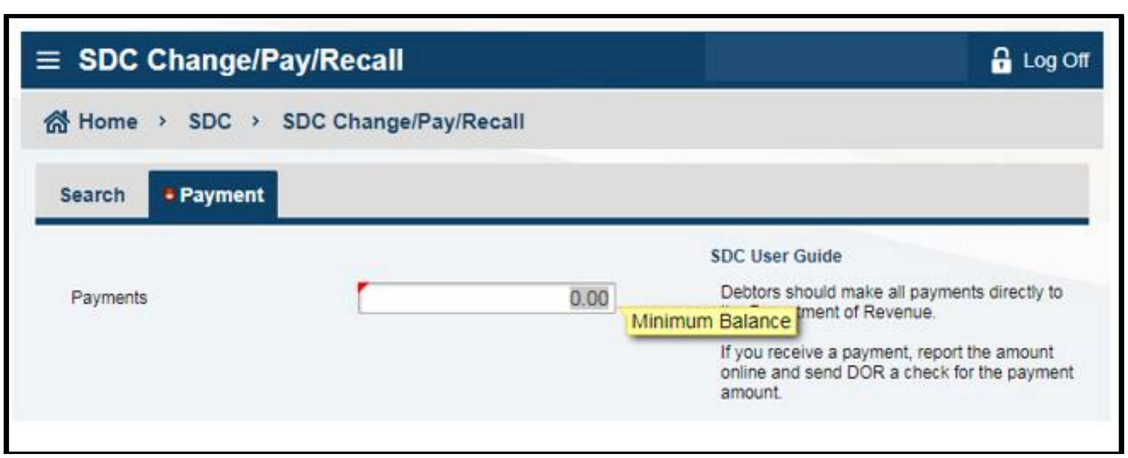
- Select **Report Payment** under 'I Want To...' at the upper right of the SDC account page
- Choose an **ID Type**. The default choice is Social Security Number, but Federal Employer's ID Number (FEIN) and Driver's License Number (DLN) are other valid options.
- Enter the **ID** number and click **Enter**

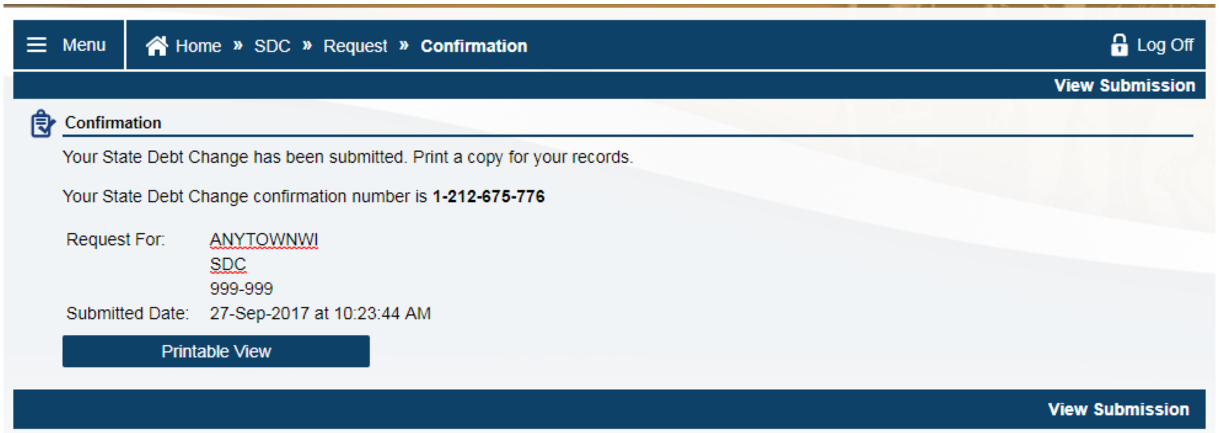


- Click on the Debt ID link



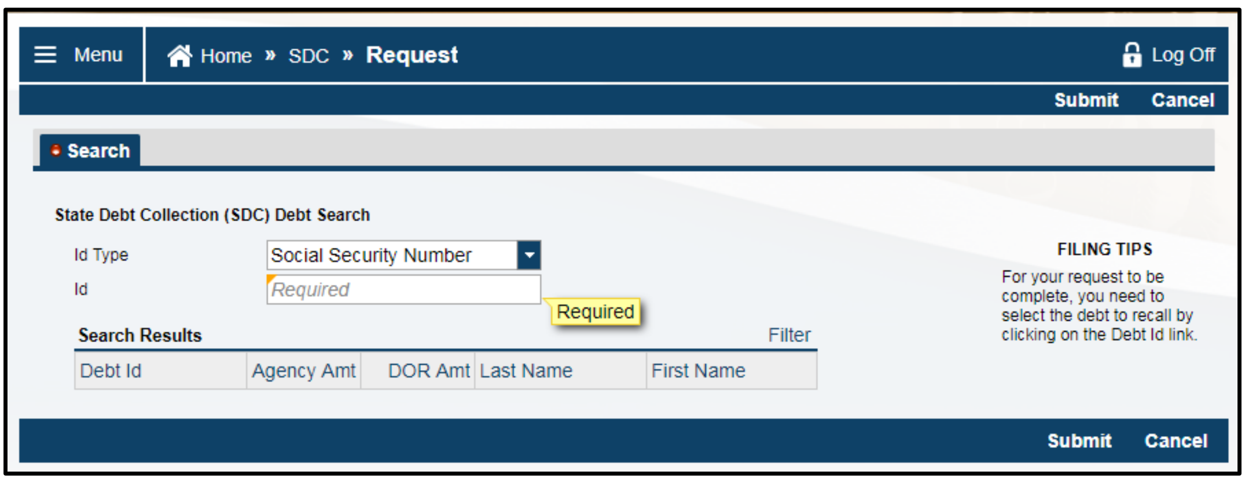
- Enter the amount of the payment and click **Submit**



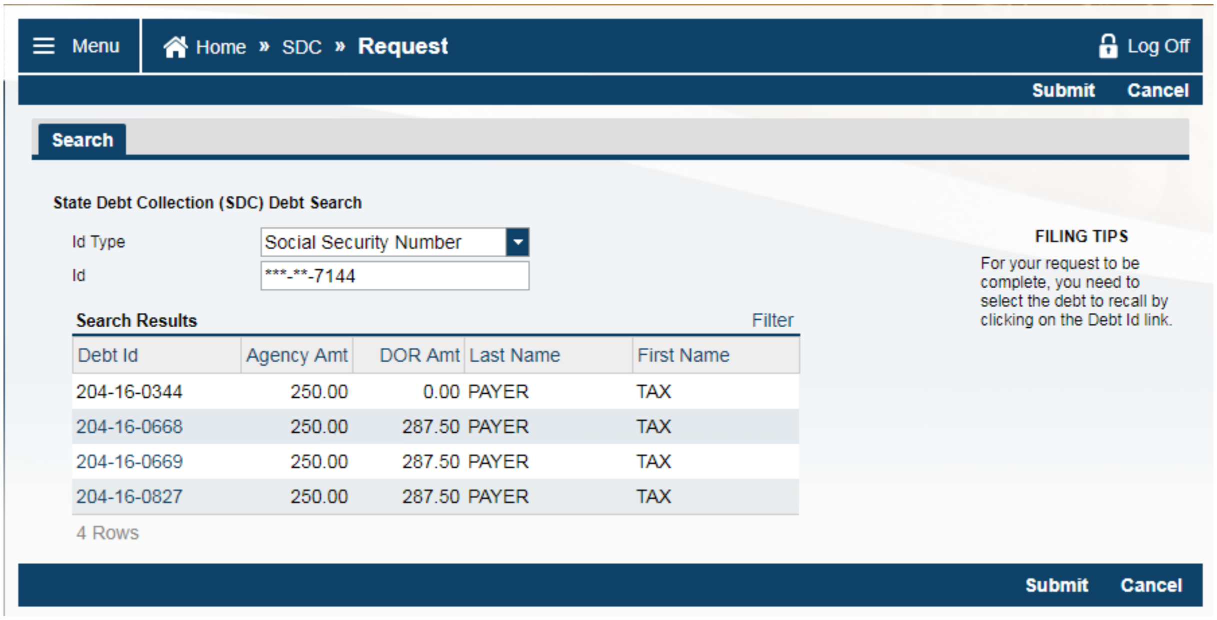


Recall Debt

- 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.

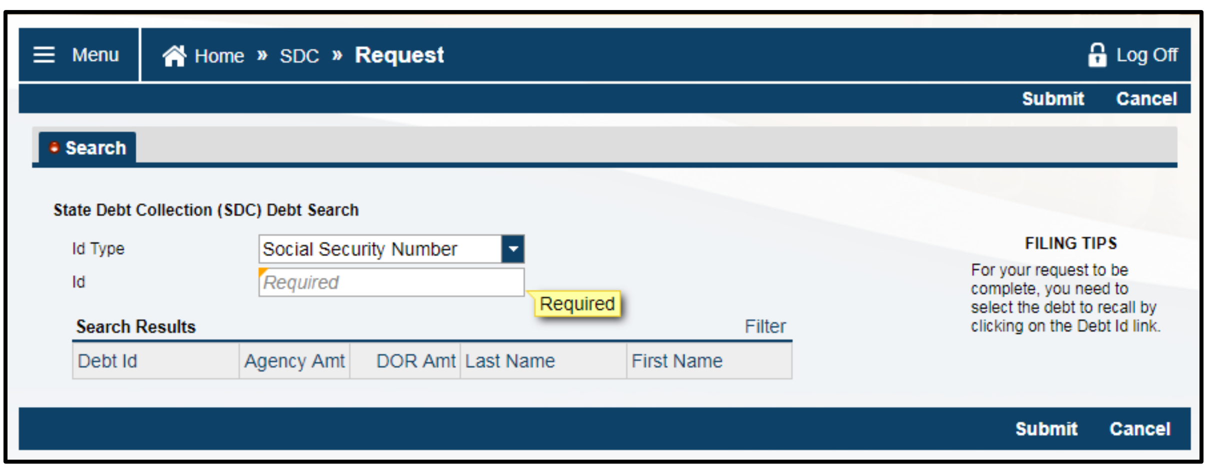


- Select the debt you want to recall by clicking the Debt ID and **Submit**



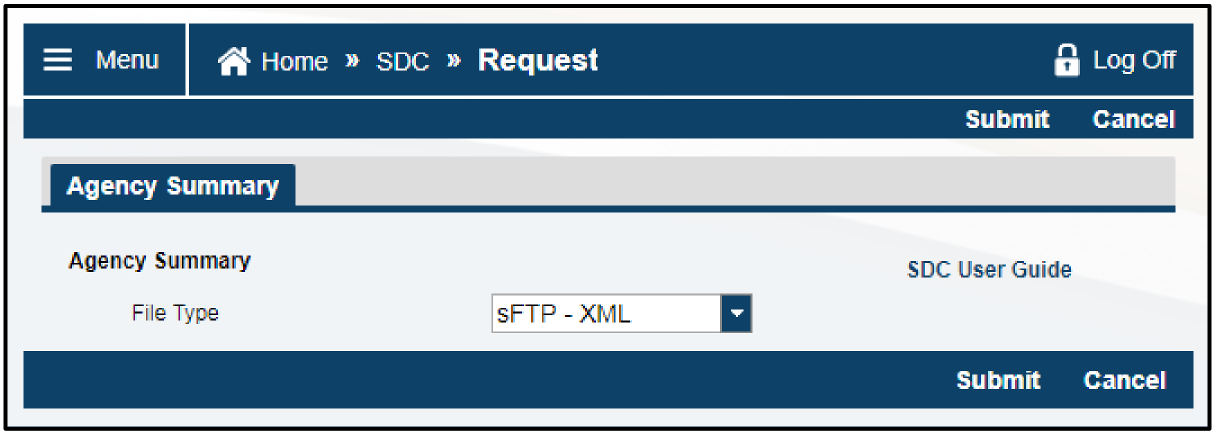
Remove Joint Debtor

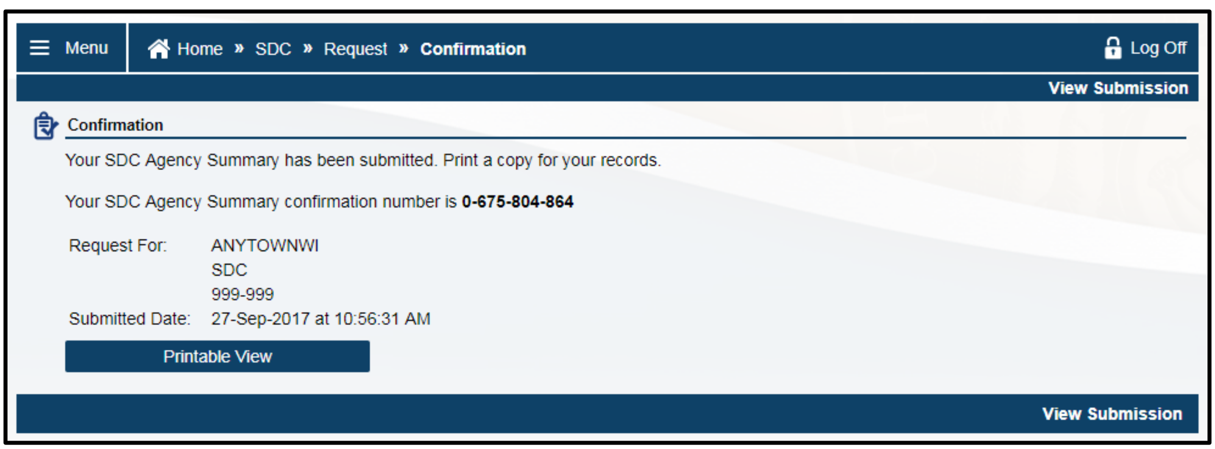
- Select **Remove Joint Debtor** under 'I Want To...' at the upper right of the SDC account page
- Choose an ID Type. The default choice is Social Security Number, but Federal Employer's ID Number (FEIN) and Driver's License Number (DLN) are other valid options.
- Enter the **ID** number and click **Submit**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



Request Agency Summary

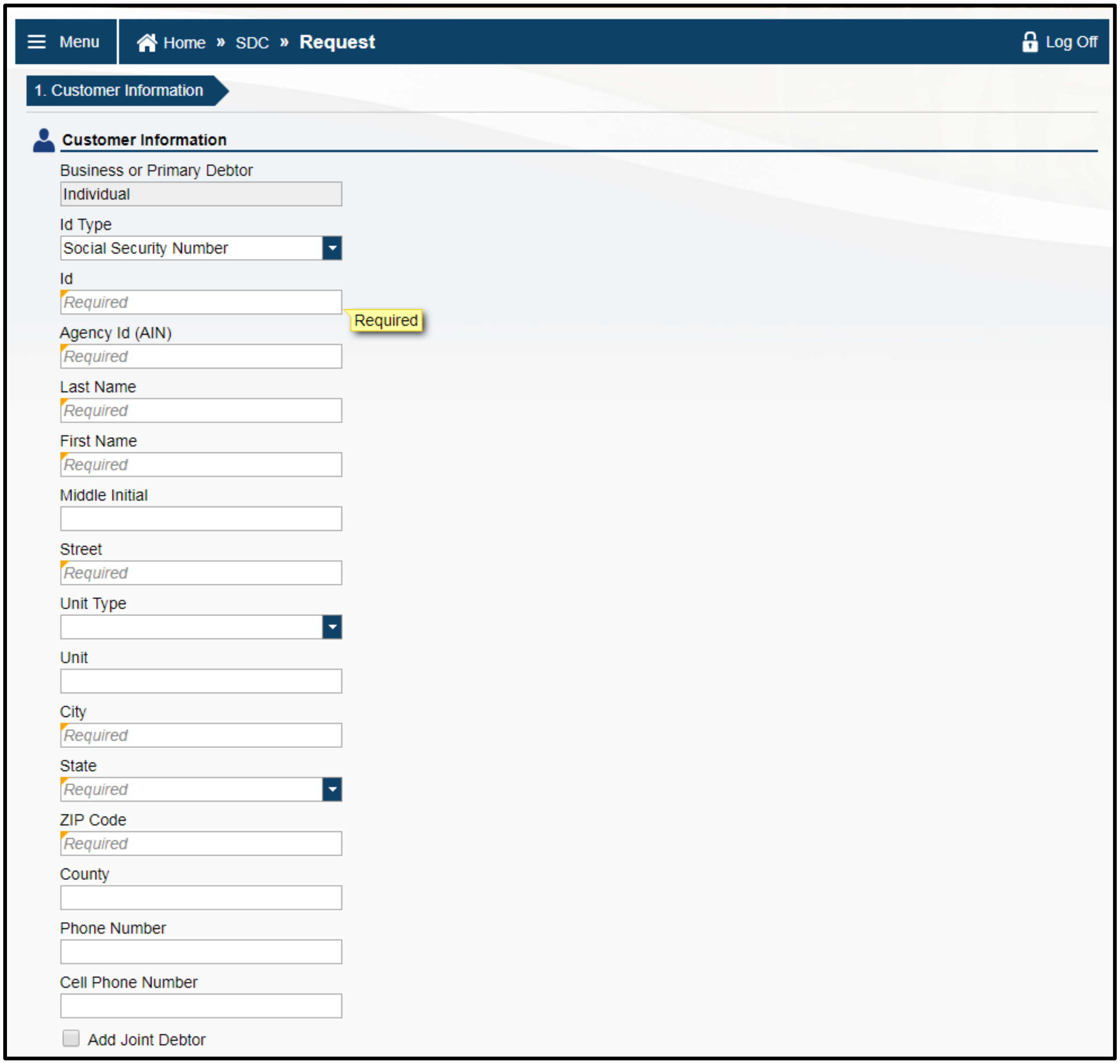
- Select **Request Agency Summary** under 'I Want To...' at the upper right of the SDC account page
- Choose a **File Type**. Choices include:
  - MTA-CSV: Opens in MS Excel, formatted
  - MTA-TXT: Opens in MS Notepad, unformatted
  - sFTP - Flat File: Sent using the flat file layout through DOR's secure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





Add New Debt

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



Customer Information

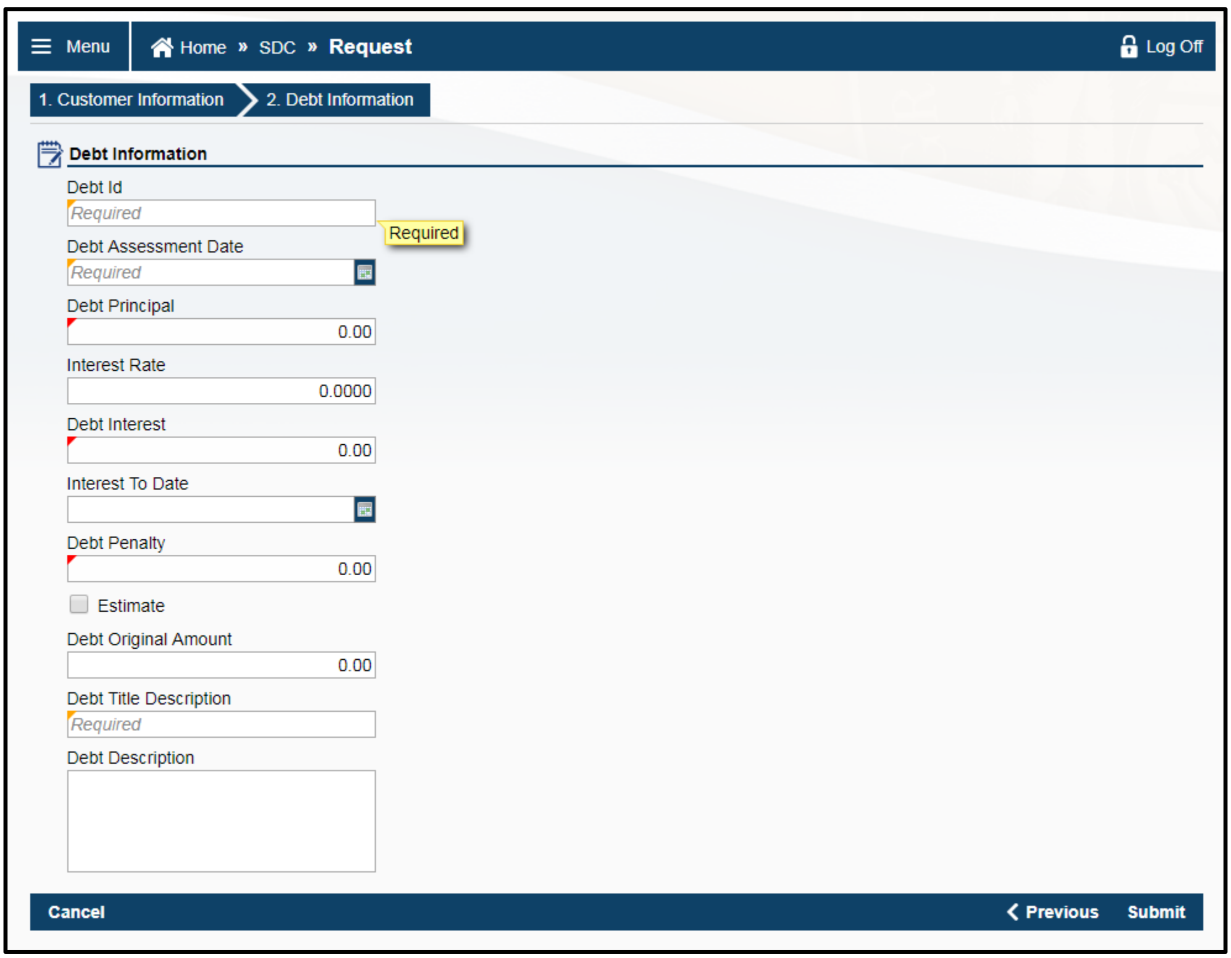
- The **Business or Primary Debtor** field is tied to the **ID Type** that you select
  - If you select an **ID Type** of Social Security Number (SSN) or Driver's License Number (DLN), this field is populated with Individual
  - If you select an **ID Type** of Federal Employer ID Number (FEIN), this 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



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**