

Tax Incremental District Report (TAR) Instructions

I. General Instructions

As an assessor, you are required to file this report with the Wisconsin Department of Revenue (DOR) under state law (sec. 66.1105(6)(a), Wis. Stats.). The TAR captures the total assessed values of all locally assessed real and personal property located in the Tax Incremental District (TID) and is used to determine the value of Tax Incremental Districts. You are responsible to file all TARs timely and with correct information.

A. Summary of new/revised 2016 instructions – there are no changes to the filing application this year

B. Electronically filing the TAR

- Due the 2nd Monday in June
- Your filing type (estimated, final, amended) depends on the status of the Board of Review (BOR)
- You must [electronically file \(e-file\) the TAR](#)
- The form is available from May 1 of the assessment year through January 31 of the following year
- **If DOR doesn't receive your TAR by the 2nd Monday in June, we will certify the previous year's non-manufacturing full value of the TID for the current year's non-manufacturing value**
- **Note:** Failure to file a TAR may result in review of the assessor's certification

C. Three types of TARs to file depending on the BOR's status:

- **Estimated TAR**
 - If the Final BOR does not adjourn by the second Monday in June, you must file an Estimated TAR by the second Monday in June, and a Final TAR within 10 days after the final adjournment
- **Final TAR**
 - If the BOR adjourns by second Monday in June, submit a Final TAR
- **Amended TAR**
 - If you already filed a Final TAR, only submit an Amended TAR to make changes to your final report
 - Submit by December 31, 2016
 - If you need to file a late Amended TAR, the form is on our website until January 31 of the next year
 - **Note:** To create an Amended TAR, you need to save your Final TAR as a **Reusable copy**

D. Accessing the TAR

- You must have a WAMS ID and password to access the form
- WAMS ID is a permanent ID and password from the Wisconsin Department of Administration
- You use the WAMS ID to access many secured state web applications
- **Note:** You use the same login process when accessing Real Estate Transfer Returns and Posting Assessments
- WAMS ID Registration and ID/password help: <https://on.wisconsin.gov/WAMS/home>

If you have questions regarding the TAR, contact the [Equalization Bureau District Office](#) in your area.

II. Form Instructions

A. Getting started

- **Note:** You must have Adobe Reader software (version 9 or greater) on your computer/system to use this form
- Open the TAR and save a reusable (dynamic) copy to your computer (ex: folder or desktop)
- When saving the document, create a unique file name ending in ".pdf" (ex: TAR_Madison.pdf)
- When you open your saved report, if you see an error message about replacing an outdated version, follow the error message instructions
- Navigating through the form
 - "Tab" key or mouse - go to next field
 - "Shift Tab" - go back to previous field
- Certain characters (ex: ?, &, \$) are not recognized in the Adobe filing platform. You will see an error notification if any information you enter contains a symbol that the system does not recognize

B. Form structure

The report has five primary sections:

1. WAMS ID login – page 1
2. General information – page 2
3. Assessor and assessment information – page 2
4. TID information – page 3
5. Completing the filing – last page

1. WAMS ID login – page 1

- a. Enter your WAMS ID and password and click “Login” – the login ID you use determines which municipalities you can complete and submit
- b. Errors and warnings:

Symbols to watch for and their meanings	
	This symbol indicates there is help available for the field. Hold the mouse pointer over the symbol to view the help message. Further information may be available if you click on this symbol.
	This symbol indicates there is something wrong with the field. Hold the mouse pointer over the symbol to view the error message. All error messages must be fixed before you will be able to file this form.
	This symbol indicates there is a caution about what has been entered into the field. Hold the mouse pointer over the symbol to view the message.

- Symbols for some errors and warnings may appear immediately after you enter data in a field - yellow indicates warning and red indicates error
- Other symbols may appear after you click " Submit"
- Warnings are intended to ensure accuracy of entered data
- You must correct errors before you can submit the form
- In some cases an error exists, but the red "X" does not appear until the errors are summarized on the last page of the form

2. General information – page 2

Assessment Year 2016	Report Type ESTIMATED 	Comu Code <input type="text" value="37138"/>	- OR -	MARATHON
		Auth Code <input type="text" value="1012"/>		VILLAGE
				HATLEY

- Assessment Year – this already is filled in with the current assessment year
- Report Type – select the type you are filing (estimated, final, amended)
- **Location**
 - Enter the "Comu Code," *or*
 - Select a county from drop-down menu. After selecting the county, a "Type" menu appears. Choose Town, Village or City. Once you select the type a "Municipality" menu appears. Choose the correct municipality and the "Comu Code" and "Auth Code" boxes will auto-fill.
- If you already submitted a report, you'll see the submit date displayed

Estimated	05/30/2016
Final	
Amended	

3. Assessor and assessment information – page 2

Assessor Information	Assessment Information
Name of Assessor / Assessment Firm	Estimated Level of Assessment ?
Name of Person Completing Report	Type of Assessment ▼
Phone Number of Person Completing Report	Anticipated Board of Review Date
E-mail Address of Person Completing Report	Board of Review Final Adjournment Date

a. Assessor Information, enter:

- Assessor's name or the assessment firm
- Name, phone number and email address of the person completing the report

b. Assessment Information, enter:

- Estimated level of assessment – this should be the same ratio reported on the Municipal Assessment Report for the taxation district. It cannot be zero.
- Either the anticipated BOR date (if filing an estimate) or the BOR final adjournment date (if filing a final or amended report)

4. Tax Increment District (TID) Information – page 3

Prior Year TID SOA Information Total Assessed Value of Non-Manufacturing Real and Personal Property	District Code	Account Number	TID # 006 POLK COUNTY, CITY OF OF AMERY	Current Year Assessment Information Total Assessed Value of Non- Manufacturing Real and Personal Property WHOLE DOLLARS Round to Nearest 100
14,540,100	480119	0286	SCH D OF AMERY	
14,540,100	Total for Regular School Districts			0
261,700	488030	0290	APPLE RIVER PRO & REHAB DIST	
14,278,400	488140	0300	AMERY LAKES PRO & REHAB DIST	
14,540,100	Total for Special Districts			0
14,540,100	Total Value of TID # 006			
Comments for TID 006				

- You will see a section (similar to box above) for each TID in the taxation district
- Prior Year TID assessed values will display, unless there is a newly created TID

TID section information

- District code, account number and district name will auto-fill
- If a TID is a “Split TID,” the name of the primary county displays in the header of the secondary piece of the affected TID
- Report assessed values of overlapped parcels ONLY in the overlapping TID
- All School districts and special districts associated with a particular TID are displayed
- **Current year assessment information (right column)**
 - **School or special districts** – enter total assessed value of non-manufacturing real and personal property located in the district (school or special) on the appropriate line. The form will auto-fill the calculated total of districts (school and special) by district type.
 - **Total Value of TID** – enter the total assessed value of non-manufacturing real and personal property located in the entire TID
- You will see a warning symbol if certain current year values are outside the range of change normally expected. Double check the values. If the values you entered are correct, you may proceed.

- **Comments for TID**
 - **Required comments** – in certain situations you must enter a comment (ex: where current year values are significantly different than prior year values, comment should explain the significant change in value)
 - If a comment is required, a red error symbol will appear
 - Only use periods and commas for punctuation. If you use any other symbols in the comments field, you will get an error message
 - **Optional comments** – enter a comment if you would like to let DOR know about general issues affecting the reported values or changes to the values

5. Completing the filing – last page

a. Submitting the TAR

Ready to Submit

Have you confirmed the form is complete, correct, and ready to submit?
If so, select "Yes" and press **SUBMIT**.

TIP: You can check for errors by selecting "No" and pressing SUBMIT.

Yes No

Save an Archive Copy

SUBMIT

Print Form

Save a Reusable Copy

- Select "Yes" and click "Submit" to file the form
- Select "No" and click "Submit" to check for errors or to save, close and finish later
- If there are no errors, when you click "Submit" your form is filed and you will see a confirmation number and recording time

b. Error messages

Error Messages (Double-click on the error message to navigate to the field that must be corrected)

You must agree that the form is ready to submit.
The difference between the current year reported value and the prior year reported value exceeds expected parameters.

- If there is an error(s) listed in the "Error Messages" box, you must correct it. You will not be able to submit the report with an error
- Each line in the error box represents one error. If the entire message is not visible, hover over the message to see the entire message.
- If you click on a single error message, you will see the section of the form with the error

c. Save and print

- Make sure you save the form after you successfully submit it
- Save each form with its own unique name. The file name should include the most important information about the submission, including: taxation district, type of report, and date of submission
- Saving the form after you submit it ensures that the confirmation number and recording time is saved with the form
- Confirmation number is the filer’s proof of submission and it is also used by DOR to confirm the exact submission
- With the Adobe fillable format you can save both an archive (static) copy and a reusable (dynamic) copy
 - **Archive (static) copy** – use this type to send to someone for his or her records (ex: clerk of the municipality)
 - **Reusable (dynamic) copy** – if you are working on the report and are unable to finish the entire document, save it as a dynamic copy and complete the report at a later time, or
 - **Note: Use the Reusable copy** to amend the report
- Print the form with the confirmation number as proof of submission

Confirmation	
Confirmation #	TAR201537181E1430148160732
Recording Time	04-27-2015 10:22:40