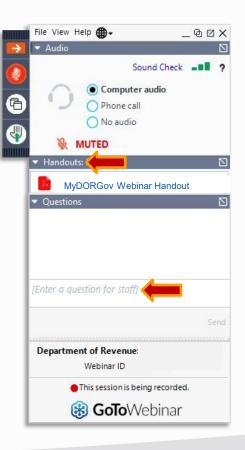


MyDORGov Webinar – Annual Refresher

WI Dept of Revenue | State and Local Finance Division May 15, 2024 | 10-11 a.m. (cst)

Webinar Information

- Download today's presentation from the Handouts section
- ➤ To ask a question type in the 'Enter a question for staff' area
- ▶ We'll respond to your question during the webinar
- ➢ All Q&A and the recorded webinar will be posted on our website within a week





Presenters

- Sara Regenauer − LGS Director
- Deb Werner Auditor
- □ Lauren Franklin SLF Integration and Automation Supervisor



Topics of Discussion



- □ Getting started/accessing the system
- ▶ How to update your contact information
- Managing others to file on your behalf approving, denying, removing access
- Using the system filing a form, viewing historical filings and notifications
- PA-551: Personal Property Report questions



Accessing MyDORGov



MyDORGov



- DOR's e-filing system for local government officials and other representatives
- E-file your required DOR forms or view previously filed forms and notifications
- Most forms are filed with the State and Local Finance Division



Today's Webinar – MyDORGov

Who should attend?

- ▶ Municipalities
- ▶ Counties
- > Technical colleges
- > Special districts
- □ Utility companies
- ▶ Assessors





Accessing MyDORGov

- MyDORGov icon is on top of these landing pages:
 - o Governments
 - o Town, villages and cities
 - o Counties
 - o <u>School/technical colleges/</u> special districts
 - o TIF information



Login | Help

My DOR Government Account (MyDORGov)

DOR's online filing system for local governments.

MyDORGov benefits, include:

- · Access to forms is specific to your role
- · View previously filed forms and DOR notifications
- Easy to manage multiple forms and districts/companies

Online Services



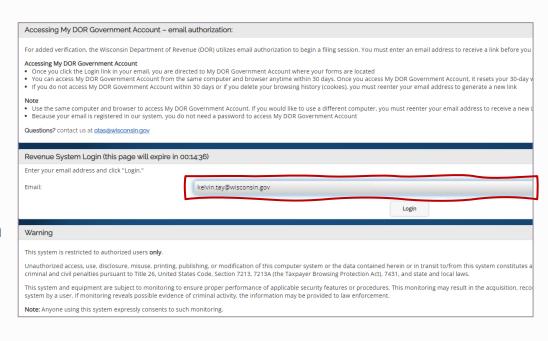
Login | Help

DOR's online filing system for local governments.



Accessing MyDORGov

- Access to the system is effective for 30 days
- If you access the system from a different computer, you'll be prompted to complete the email authorization process again
- Enter your email address and click 'Login'





Email Link



You'll receive an email with a link to access MyDORGov − Link will take you to the MyDORGov home page





Email Link



- ▶ Troubleshooting
 - o Check your junk or spam folders for the email
 - o Add a spam exception for @wisconsin.gov
 - o Try using a different browser
 - O If you want to access the system using Chrome, but the email with the link is in Microsoft Outlook, copy and paste the link into Chrome rather than just clicking the link



MyDORGov Home Page



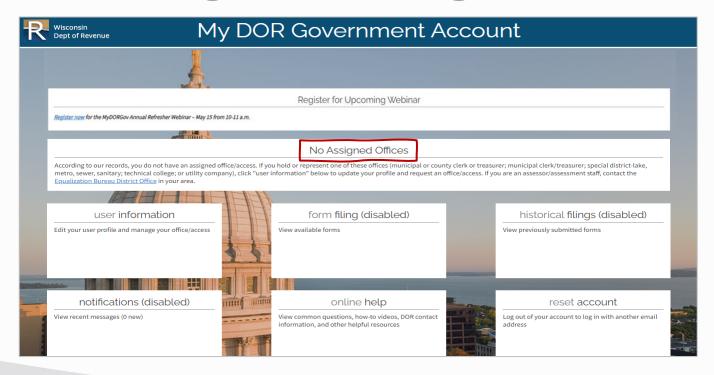
Home Page – User Summary

- Window appears if this is the first time you log into MyDORGov – verify information once a year thereafter
- Enter your information to create your user profile and save
- ➤ Takes you to the home page showing 'No assigned offices'





Home Page – No Assigned Offices





Home Page – Assigned Offices



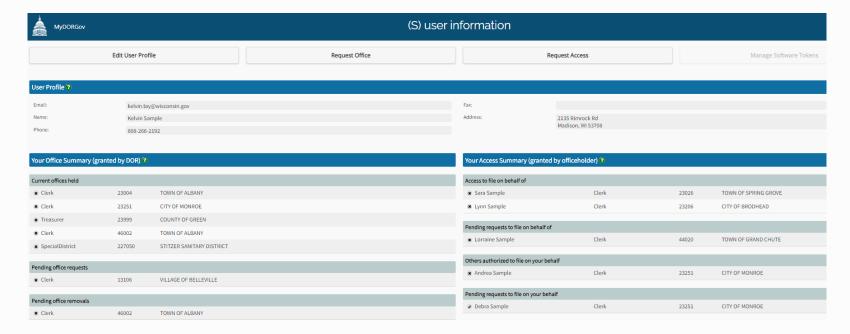


User Information Page

And System Navigation



User Information





User Information



- Edit user profile − update your contact information
- > Your office summary shows the offices you hold
- > Your access summary shows the users who can file on your behalf and the officeholders you can file on behalf of
- Request an office or access
- Manage software tokens (this option is for assessors only)
- Note: It's important to verify your profile information and accesses are correct



Edit User Profile

- ➤ You can update name, phone and fax number, and address
- Contact lgs@wisconsin.gov to:
 - o Update your email address
 - o Consolidate multiple profiles
 - o Create a secondary email address
 - O Disable or deactivate a user's profile
- ▶ Assessors
 - Update email in eRETR assessment staff, contact assessor to update your access
 - O Note: Assessors can't have a secondary email address





Your Office Summary

- Only the actual officeholder can request to hold an office
 - o Clerk (municipal or county)
 - o Treasurer (municipal or county)
 - Municipal Clerk/Treasurer
 - o Special District Representative
 - o Technical College Representative
 - o Utility Company Representative

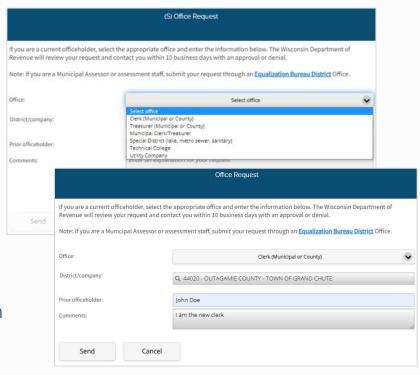
Your Office Summary (granted by DOR) 😨					
Current offices held					
* Clerk	23004	TOWN OF ALBANY			
* Clerk	23251	CITY OF MONROE			
* Treasurer	23999	COUNTY OF GREEN			
* Clerk	46002	TOWN OF ALBANY			
★ SpecialDistrict	227050	STITZER SANITARY DISTRICT			

- ▶ If you no longer hold an office, request to have it removed
 - o Click (x) you are asked to confirm the office removal
 - o Email sent to DOR to process your request
 - o Office moved to 'Pending Office Removals' until DOR removes the office



Request Office

- DOR grants office permissions
 - o DOR will review your request and approve/deny within 10 business days
- Request office − enter or select appropriate information
- DOR sends an email notifying you of its decision
 - o Approved log in and begin filing
 - Denied use the contact information in the email to follow-up





Your Access Summary

- ▶ Permission granted by officeholder
- Possible sections under this panel
 - Access to file on behalf of lists offices (or other users)
 you authorized to file on behalf of
 - o Others authorized to file on your behalf – for officeholders only and shows the users authorized to file on their behalf

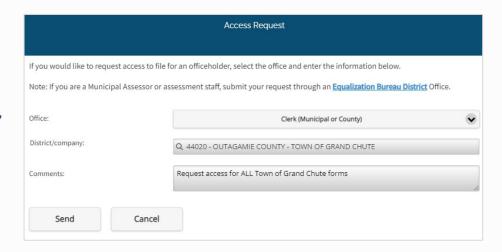
Your Access Summary (granted	by officeholder) 😯		
Access to file on behalf of			
★ Sara Sample	❸ Clerk	23026	TOWN OF SPRING
* Lynn Sample	6 Clerk	23206	CITY OF BRODHEA
Pending requests to file on behalf of			
* Lorraine Sample	Clerk	23004	TOWN OF ALBANY
Others authorized to file on your bel	half		
* Andrea Sample		23251	CITY OF MONROE
Pending requests to file on your beh	alf		
Debra Sample	Clerk/Treasurer	23251	CITY OF MONROE

- o Pending requests to file on your behalf or on behalf of an officeholder
- In each section, lists are sorted by district code



Request Access

- Click 'Request Access' on the user information page
- Use if you aren't an officeholder, but need to file on their behalf
 - o Example: deputy roles, staff roles in a municipal or county office, other representatives filing on behalf of a district/company officeholder (such as a CPA)

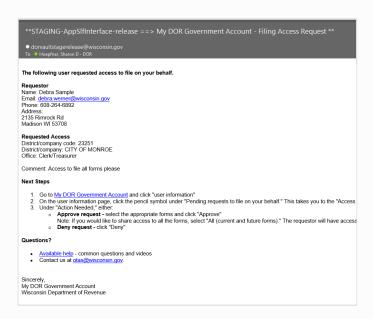


Enter or select appropriate information



Request Access

- Email sent to the officeholder to process your request
- ➤ Your request shows under 'Pending Access to file on behalf of'
 - o You will receive an email with the decision
 - o If approved, login to MyDORGov to being filing
 - District/office will now be available on your access summary – 'Access to file on behalf of'



- ▷ If you're granted access to file specific forms, but need to change/add to the list.
 - o Contact the officeholder directly
 - o Officeholder can modify your access



Review Pending Requests

- Officeholders can approve or deny access requests
- - o Click the 'Pencil' icon
 - o Review the requester information
 - o Options:
 - Deny the request click deny
 - Approve the request select all forms or select specific forms

Your Access Summary (granted by officeholder) 🧿					
Access to file on behalf of					
* Sara Sample	€ Clerk	23026	TOWN OF SPRING O		
* Lynn Sample	1 Clerk	23206	CITY OF BRODHEAD		
Pending requests to file on behalf of					
* Lorraine Sample	Clerk	23004	TOWN OF ALBANY		
Others authorized to file on your behalf					
* Andrea Sample	 	23251	CITY OF MONROE		
Pending requests to file on your behalf					
Pebra Sample	Clerk/Treasurer	23251	CITY OF MONROE		

Approved requester now appears under the 'Others authorized to file on your behalf' section of 'Your Access Summary'



Review Access

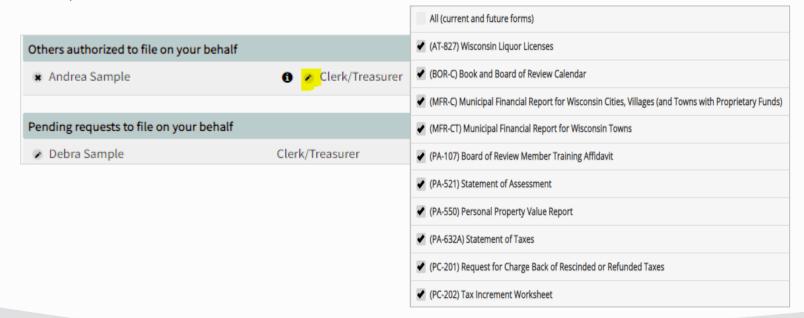
Click info icon – to view the forms you can file, or a user can file on your behalf





Changing/Removing Access

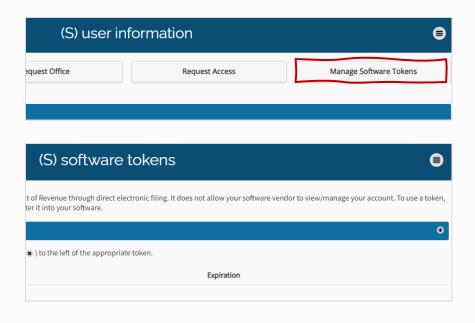
Click pencil icon − to add/delete forms





Manage Software Tokens

- Only assessors can access (button grayed out for other users)
- Provide token to your software vendor for direct electronic filing
- Doesn't allow software vendor to view/manage your account
- Click (+) to create token − enter a name and click 'Create'
- Click (x) to delete token

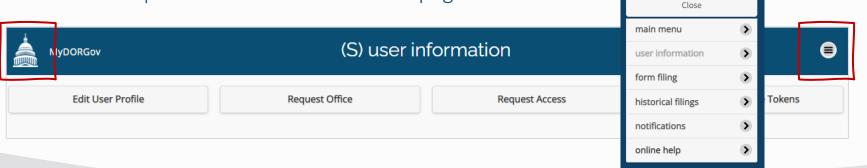




System Navigation

Menu and capitol icon

- - O Return to main menu (home page), or go to other pages (your current page is grayed out)
 - o Make a selection or close the menu
- Click capitol icon to return to home page

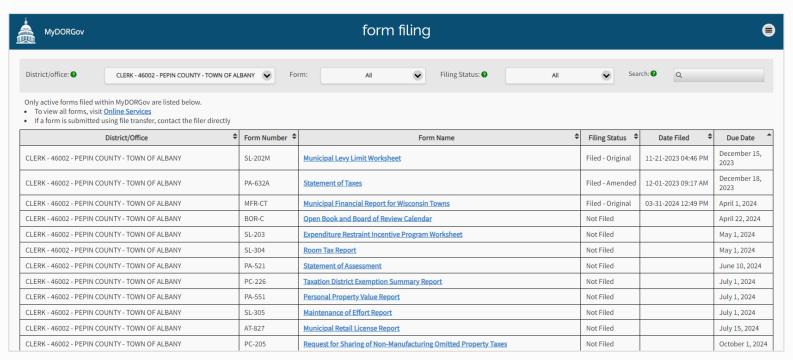




Form Filing Page



Form Filing





Form Filing

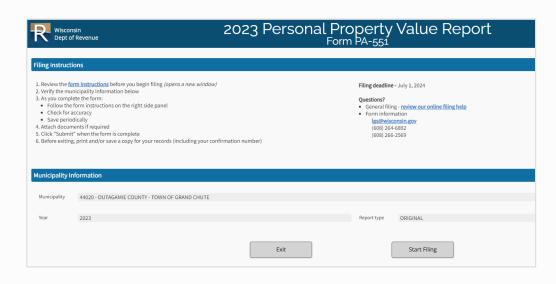


- Lists your active forms with filing status, date filed and due dates
- Online Services all local government forms listed with filing reminders
- ▷ Dropdown menu lists your districts/offices
- Dropdown menus default to 'All'
- > You can filter by:
 - O Your district/office | form number and name | filing status | entering a keyword in the Search box | clicking column arrows to sort | using arrows to re-sort columns by form number, name or due date
- Exiting a form without submitting it returns you to the form filing page
- Submitting a form − returns you to the MyDORGov home page



Submitting a Form

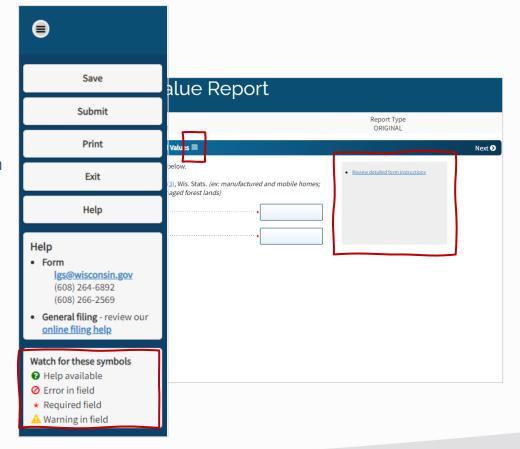
- First page of each form looks similar
 - Includes filing instructions and may also have a link to detailed instructions
 - Contact information for form-specific questions
- When you're ready, select Start Filing to begin





Within Form

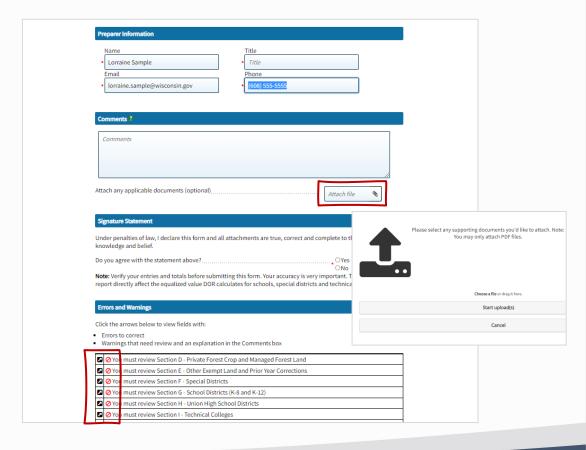
- ➢ All secondary pages
 - o Left blue panel
 - Save, submit, print or exit form
 - Form help
 - General filing help
 - Symbol legend
 - Right gray panel –additional instructions
 - o Section header menu
 - o Help bubbles throughout
 - o Error and warning messages appear





Within Form

- > Preparer/Signature page
 - o Attach files
 - Click arrows to see/fix error and warning messages





Historical Filings Page



Historical Filings





Historical Filings



- Review and print forms filed in the past three years
- Clerks and treasurers have access to view forms their municipality/county filed
- ▶ If you file on an officeholder's behalf, you can only see forms you have access to
- Dropdown menus default to 'All'
- > You can filter by:
 - o Your district or office
 - o Form number and name
 - o Filing year
 - o Entering a keyword in the Search box
 - O Clicking column arrows to sort



Historical Filings



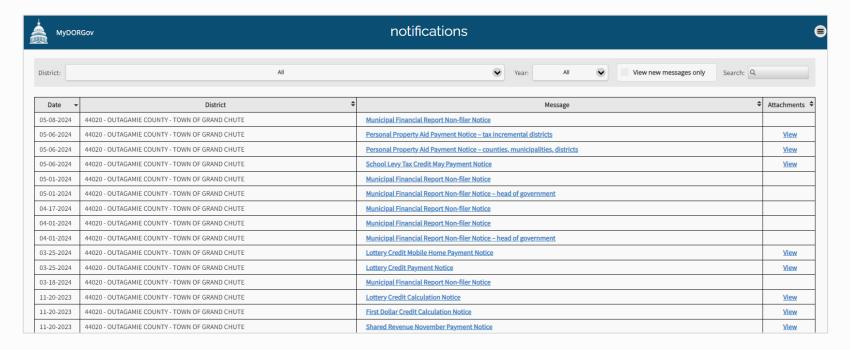
- View PDF of filed form − click form name link
 - o Browser must allow pop-ups from the DOR website
 - o Form opens in a new tab
 - o Download, print, or save
- - o Click link to see attachments (PDFs)
 - O Dialog box opens multiple attachments are listed individually
 - O Click link to open the attachment opens in a new tab
 - o Download, print or save



Notifications Page



Notifications





Notifications

- Important notices and reminders from DOR
- Box on the home page shows how many new messages since your last visit
- Messages specific to your role
 - o If you only have access to file on behalf of an officeholder, you won't see the notices the officeholder received
- Dropdown menus default 'All'
 - o Filter by district or year
 - o Search by keyword
- Check 'View new messages only' to see new messages since last visit to the page



View recent messages (27 new)



View new messages only



Notifications



- Click column arrows to sort
- Click link in the message column to view − a dialog box opens with the message
- □ If a message has attachments (PDFs), click 'View'
 - o A new dialog box opens
 - o Click link to open the attachment opens in a new tab
 - o Download, print or save



Online Help



Online Help

State and Local Finance - Online Filing Help

Below is some helpful information for local government officials that must file information with the State and Local Finance Division (SLF) – primarily using My DOR Government Account

Filing/System Help

- Common questions
- Helpful videos
- File transfer instructions
- Other forms under 'Government'

Resources

- Online Filing Reminders view all forms and download form filing reminders
- Stay informed
 - o Subscribe to DOR E-news to receive updates from SLF
 - Review recent and prior year news for <u>Municipal and County Officials</u> and <u>Assessors</u>
- · Be prepared review:
 - Local Government Calendar
 - o Municipal Staff Filing Timeline & Resources
- Additional local government <u>resources</u>

Contact Us

Municipal and County Officials

- · Contact lgs@wisconsin.gov
 - Update incorrect email address within MyDORGov
 - Form specific questions
- System help contact otas@wisconsin.gov

Assessors and Assessment Staff

- Update incorrect email address within MyDORGov
- Add or remove a municipality within MyDORGov
- Contact
 - o Assessor DOR's Equalization Bureau
 - Assessment staff ask the assessor you are listed under to update your email in the Manage Users system
- System help contact otas@wisconsin.gov



Online Help



- Dens a web page on a new tab
- Filing/System Help − links to common questions and how-to videos
- Contact Us lists contacts based on user type
- Resources
 - o Download filing reminders
 - Subscribe to DOR E-News receive emails for due dates, payment dates, law changes, etc.
 - o Recent/past news for municipal and county officials, and assessors
 - o 2023 local government calendar



Reset Account



Reset Account





Reset Account



- Uncommon only use if you need to sign out and log in with another email address
- Example: you use different email addresses because you have multiple officeholder positions
- Pop-up window asks if you are sure you want to log out of your account
- Selecting 'Yes' logs you out of MyDORGov with your current email address
- Click the MyDORGov icon to login with a different email address
- > You'll receive a new link by email to access the system



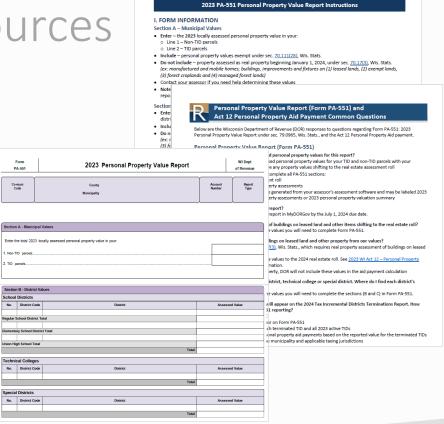
Form PA:551

2023 Personal Property Value Report



Form PA-551 — Resources

- ▶ Form instructions revenue.wi.gov/DORForms/pa551instr.pdf
- Common questions revenue.wi.gov/Documents/ppa-cqs.pdf
- ▶ Blank form − revenue.wi.gov/DORForms/pa-551blank.pdf





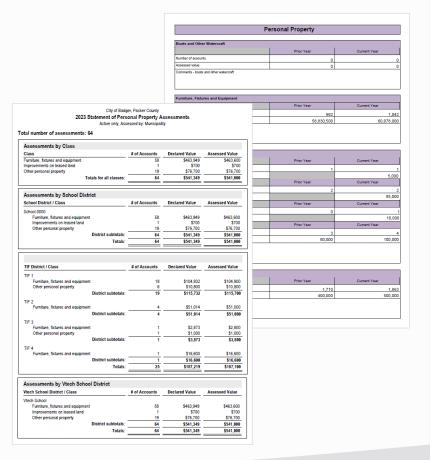
Form PA-551 – Tips

- Consult with your assessor who will:
 - o Use the following reports
 - 2023 MAR Municipal Assessment Report personal property page
 - 2023 Statement of Personal Property Assessments
 - o Identify items shifting to the real estate roll (improvements on leased land, mobile homes) that must be excluded from the values you report on the PA-551
 - O Determine the value of 2023 locally assessed personal property to report on the PA-551



Form PA-551 – Tips

- Share blank version of the form and form instructions with your assessor
- Some reports you may find useful when completing the PA-551:
 - 2023 Statement of Personal Property
 Assessments
 - 2023 Municipal Assessment Report (MAR)
 personal property page





Example

- No TIDs − Tax Incremental Districts
- One school district, technical college, special district

Section A — Municipal Values ≡		
Enter – the 2023 locally assessed personal property values subject to exemption sec 70.111(28), Wis. Stats., below.		
Do not include – property assessed as real property beginning January 1, 2024, under secs. <u>70.03</u> and <u>70.17(3)</u> , Wis. Stats. (ex: manufactured and mobile homes; buildings, improvements and fixtures on (1) leased lands, (2) exempt lands, (3) forest croplands and (4) managed forest lands)		
1. Non-TID parcels		
2. TID parcels		



Section A – Municipal Values

- Use the 2023 MAR Municipal Assessment Report to calculate the value of 2023 locally assessed personal property
- ▶ Personal property page total personal property

Total Personal Property			
	Prior Year	Current Year	
Number of accounts	1,710	1,863	
Assessed value	400,000	500,000	
Comments - total personal property			



Items Shifting to RE Roll

- Tower valued at 5,000
 Assessor identified as real estate for 2024
- □ Buildings on leased land 85,000 value

MAR – personal property page		
MAR total personal property	500,000	Total value of 2023 taxable personal property
Less buildings on leased land	(85,000)	(Taxable as real estate in 2024)
Less mobile homes	(10,000)	(Taxable as real estate in 2024)
Less other	(5,000)	(Taxable as real estate in 2024)
Exempt personal property 400,000		Total value of exempt personal property for PA-551 report



Section A – Municipal Values

- > \$500,000 (total 2023 personal property)
- Less \$100,000 (personal property shifting to real estate in 2024)
- Equals = \$400,000 total 2023 locally assessed personal property value

Section A — Municipal Values ≡		
Enter – the 2023 locally assessed personal property values subject to exemption sec 70.111(28), Wis. Stats., below.		
Do not include – property assessed as real property beginning January 1, 2024, under secs. <u>70.03</u> and <u>70.17(3)</u> , Wis. Stats. (ex: manufactured and mobile homes; buildings, improvements and fixtures on (1) leased lands, (2) exempt lands, (3) forest croplands and (4) managed forest lands)		
1. Non-TID parcels \$ 400,000		
2. TID parcels \$0		



Section B — District Non-TID Values

School Districts

No.	District Code	District	Non-TID Assessed Value
1.	440147	SCH D OF APPLETON AREA	* \$400,000
Regular School District Total		trict Total	\$ 400,000
Elementary School District Total		l District Total	\$0
Union High School Total		Total	\$ 0
Total		Total	\$ 400,000



Section B — District Non-TID Values

Tech	Technical Colleges			
No.	District Code	District	Non-TID Assessed Value	
1.	001200	FOX VALLEY TECHNICAL COLLEGE APPL	* \$400,000	
		Total	\$ 400,000	

Special Districts

No.	District Code	District	Non-TID Assessed Value
1.	447140	GRAND CHUTE SANITARY DISTRICT #3 *	* \$ 400,000
		Total	\$ 400,000



Section C – TID Values

- □ If your municipality doesn't have any TIDs you won't fill this section out
- ▷ Click 'Next' to go to Preparer/Signature Page

Section C — TID Values ≡

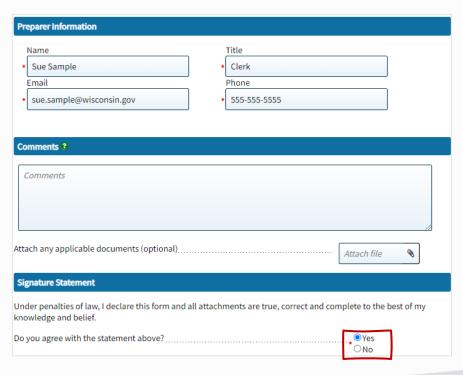
There were no TIDs within your municipality in 2023.



Preparer/Signature Statement

- Final step − verify preparer information is correct
- Enter comment − verified values with our assessor
- Select 'Yes' for signature statement
- Click 'Submit'





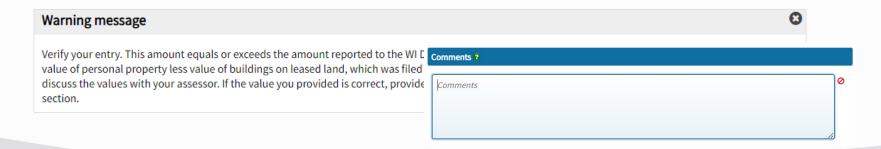


Yellow Triangle – Warning in Field

> You should still be able to file your report

\$ 100,000,000

- ▷ Add a comment explaining entry
- Attach a copy of the 2023 Statement of Personal Property to your form.





Resources



Resources



- Contact information
 - o Phone (608) 264-6892 or (608) 266-2569
 - o Email lgs@wisconsin.gov
- □ Using MyDORGov revenue.wi.gov/Pages/FAQS/slf-vault.aspx
 - o Common questions
 - o Videos
- DOR training page revenue.wi.gov/Pages/Training/Home.aspx
 - O Recorded version of this webinar posted within a week
 - o Q&A from this webinar as a PDF



Thanks!

Any questions?

slf@wisconsin.gov







Mission

Strengthen Wisconsin through fair tax and lottery administration, while educating and serving the public, our customers and communities.

Vision

To be the premier agency in providing innovative, accessible resources, and exceptional customer service built on a foundation of trust, inclusivity and creativity.

Values

- Integrity
- Innovation
- Inclusivity

- Knowledge
- Empathy
- Security