# TRIP EXTERNAL (Query Access) User Manual

Version 1.7 dated July 31, 2006

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# INTRODUCTION TO THE USER MANUAL

## How To Use This Manual

Every care has been taken while designing this user manual to ensure that we do not use complicated and long sentences, thus enabling you to better understand the product. This manual is written with the assumption that you are familiar with the concepts and conventions used in Microsoft Office applications and that you have experience with some MS Office applications. The manual is thus user friendly, as it uses graphical representation for explaining various aspects of the TRIP system.

For example, it uses a mouse image to indicate that the user has to click a button or a HTML link to navigate the user to that particular topic or image. The significance/relevance of the symbols used in this manual is explained in the section **Visual Cues.**

An example is provided for every operation throughout the manual to facilitate you in better understanding the DOR TRIP system.

# Visual Cues Used In This Manual

| | |
|---|---|
| | Indicates that you have to type information in the box provided. |
| | Indicates that you have to click a button, image or link. |
| | Indicates what you see when you perform an action. |
| Tip | Provides tips for easy interaction with the product. |
| Note | Cautions a user not to perform a particular act. |

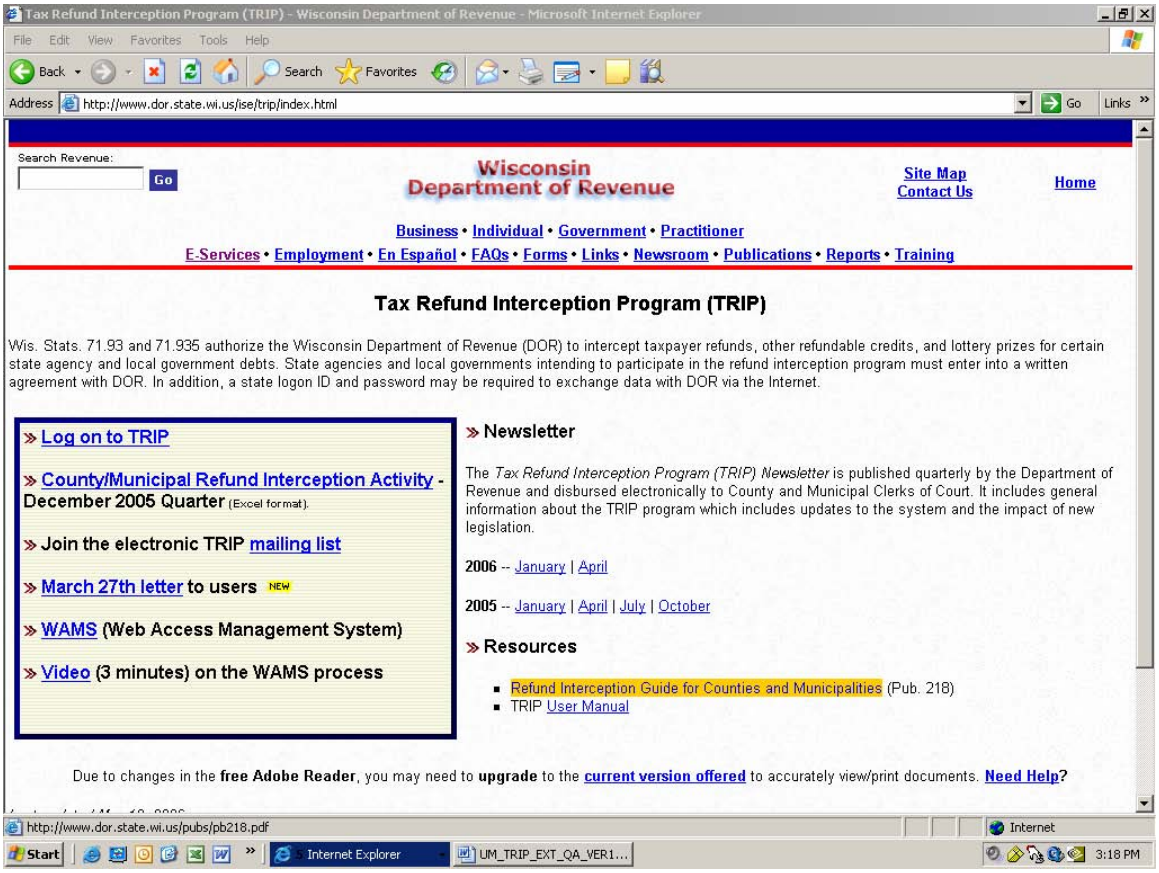
# LOGIN

## TRIP External (Query Access) Login

### What You Should Do

- Open a web browser session and enter the following URL in your address bar: http://www.dor.state.wi.us/ise/trip/index.html.

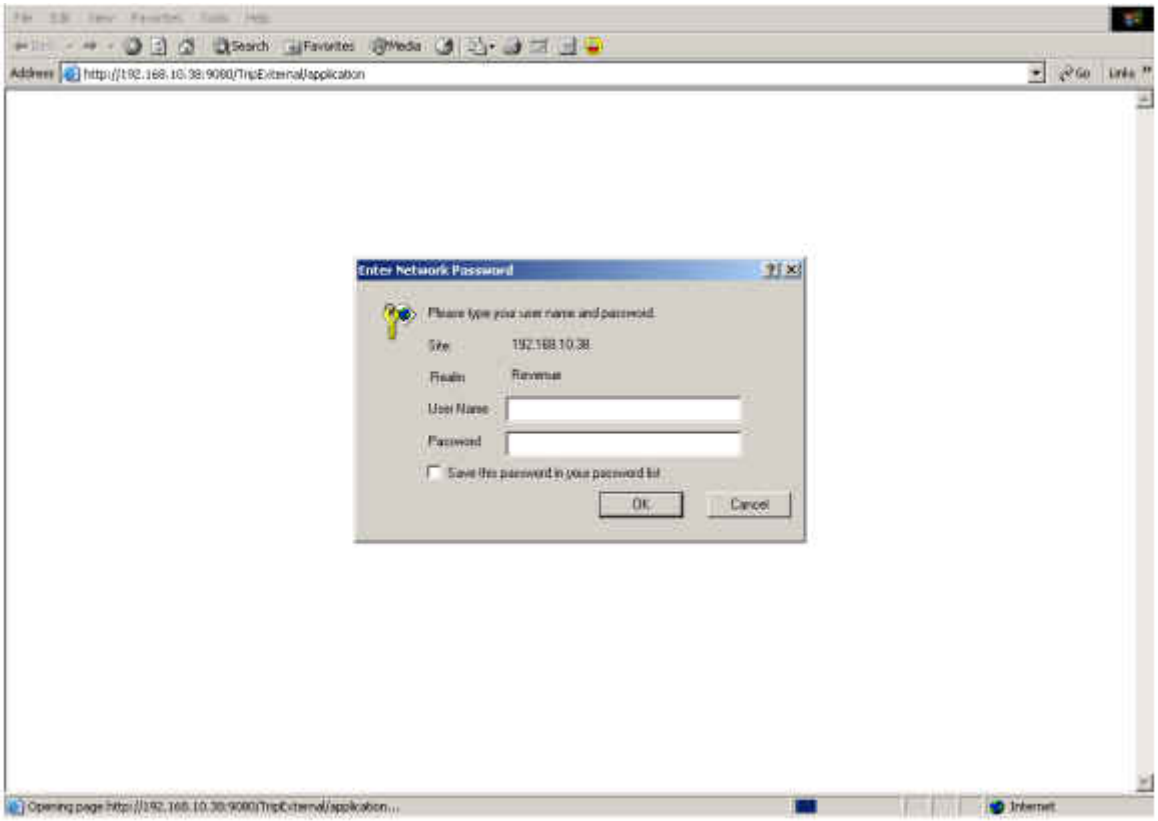
### What You See




### What You Should Do Next

- Click on the 'Log on to TRIP' hyperlink.

## What You See

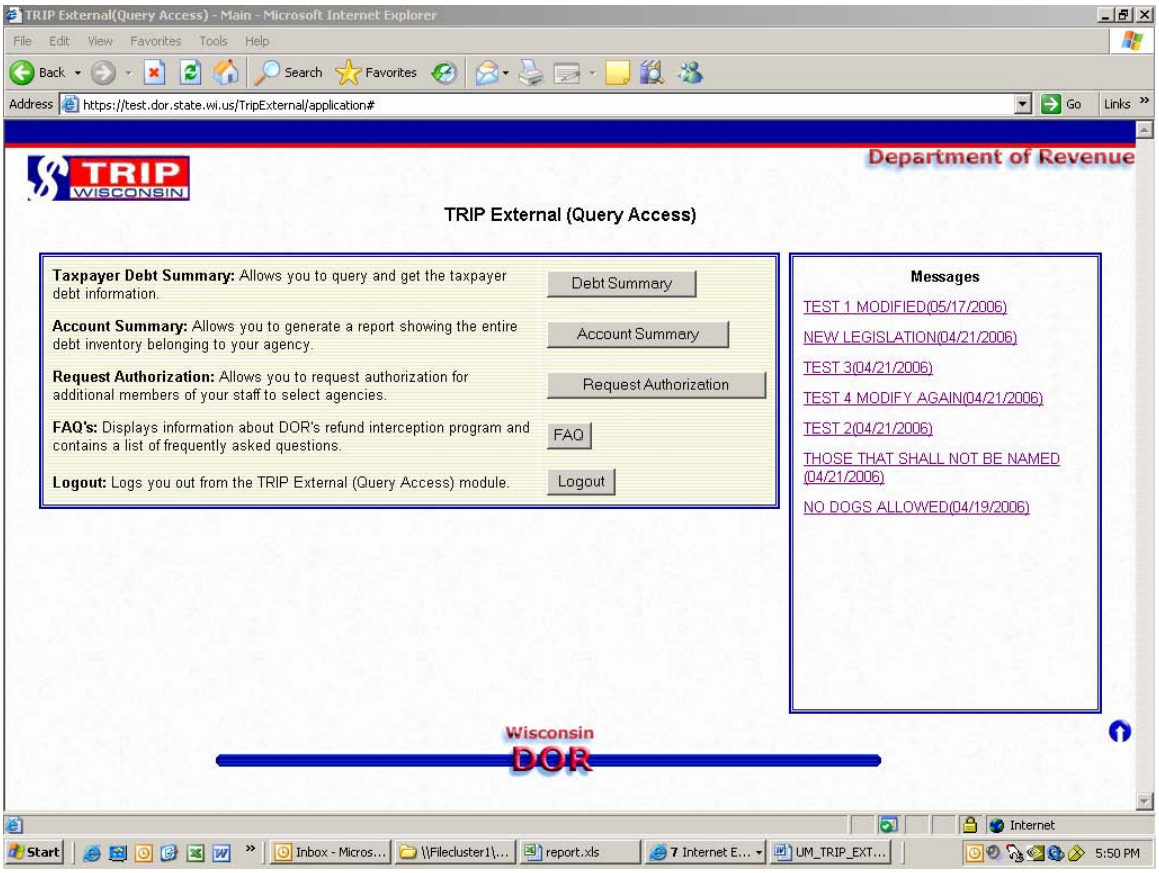



## & What You Should Do Next

- Enter your **WAMS ID** in the **'User Name'** field and your **WAMS password** in the **'Password'** field to access the TRIP system and click **'OK'**.

# TRIP External (Query Access) Main Menu Page

## What You See




- This is the initial screen that is displayed after you successfully logon to the TRIP system as an external user with query-only access.

## What You Can Do Here

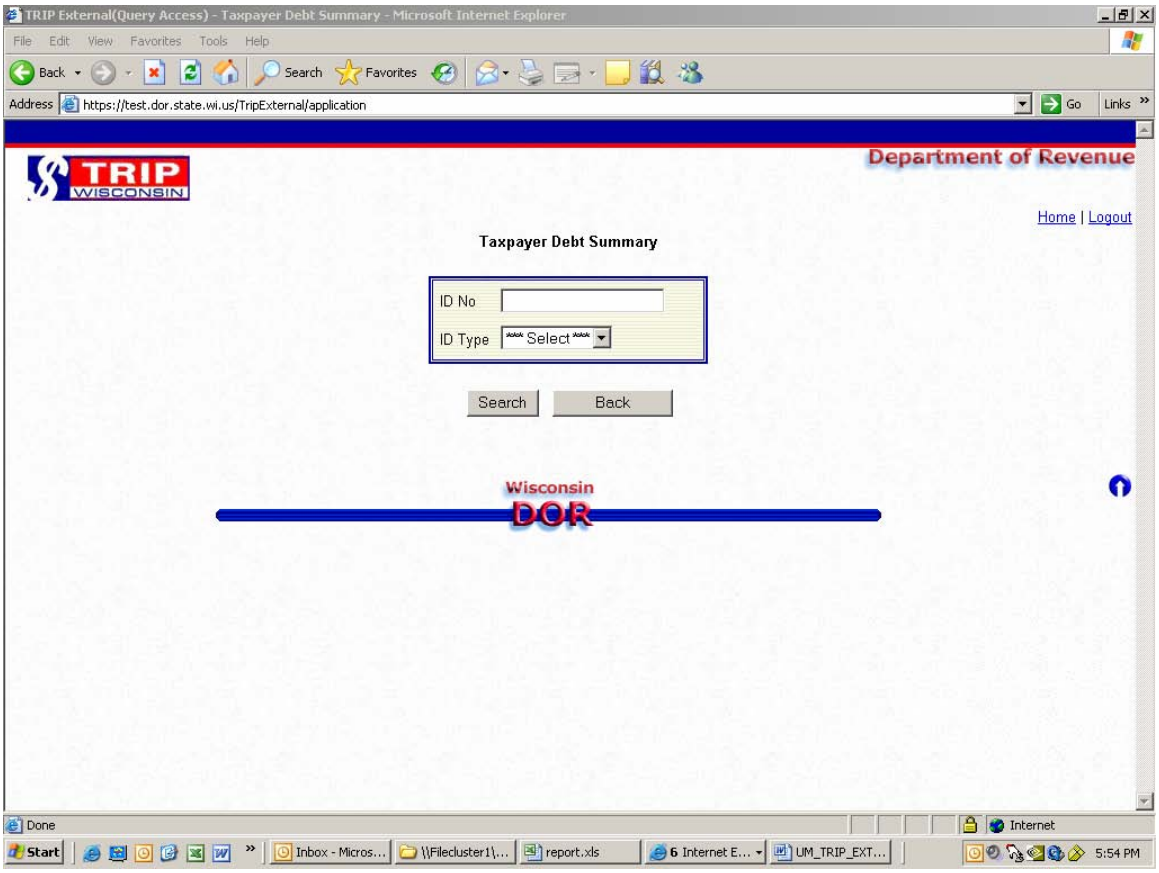
- Navigate to the Debt Summary page to query the system for information on a specific debt or debtor.
- Navigate to the Account Summary page to view or download an agency's account summary.
- Navigate to the FAQ page to get the answers to frequently asked questions related to TRIP.
- Log out from the TRIP system.

# Debt Summary

### What You Should Do

- Click on the **'Debt Summary'** button on the Main Menu page.

### What You See



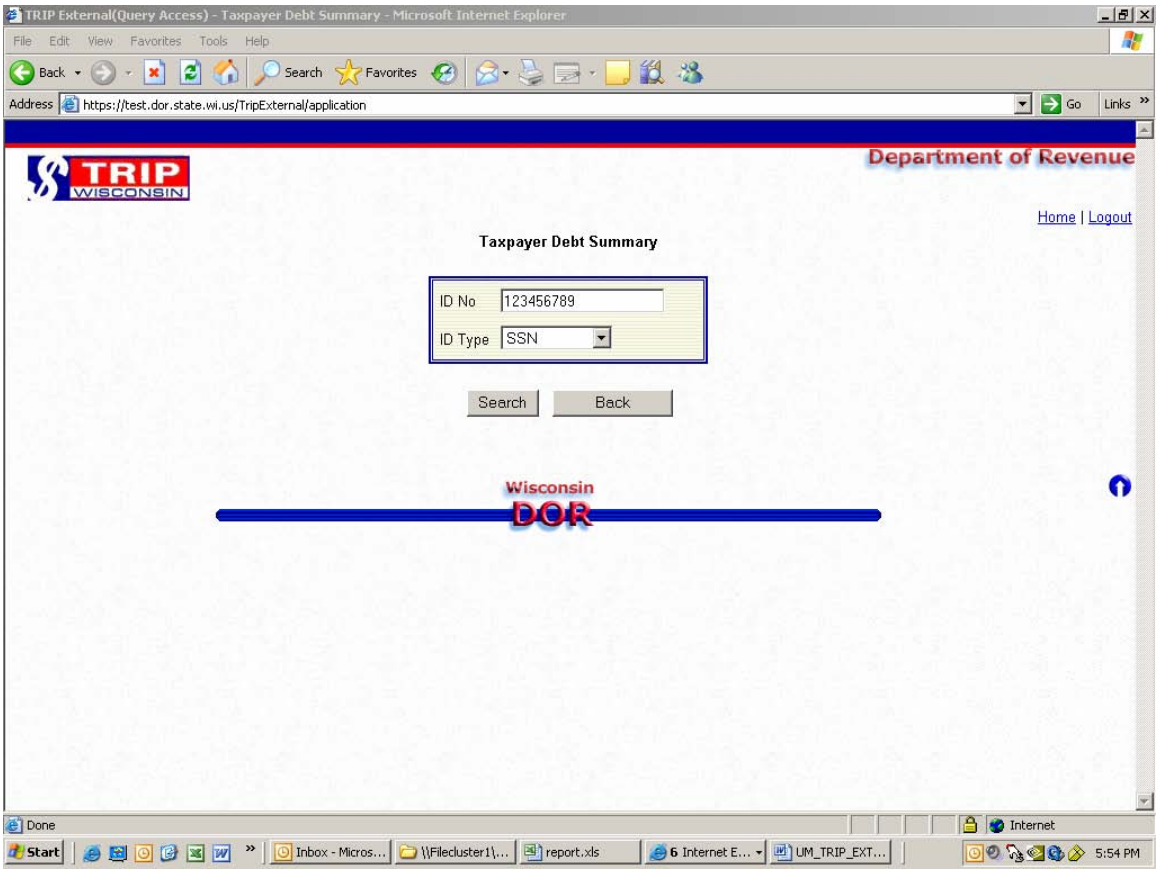

### What You Can Do Here

- You can search for the debt details of a specific debtor.

### & What You Should Do

- Enter an **'ID No'** and select an **'ID Type'.**

## What you see



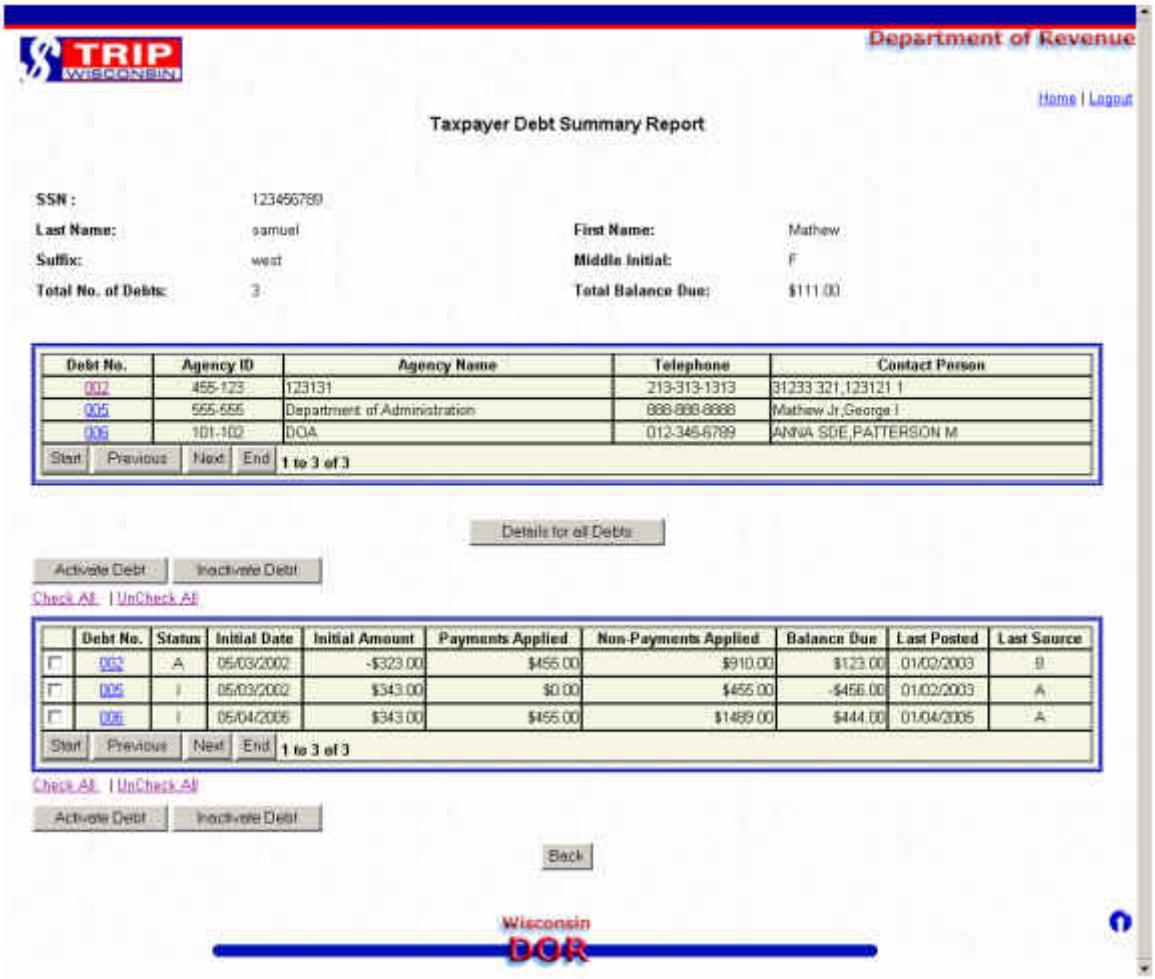

## What You Should Do Next

- Click **'Search'** to bring up the debt details of the debtor.
- Click **'Back'** to return to the previous page.
- Click **'Home'** to return to the Main Menu page.
- Click **'Logout'** to log out from the TRIP system.

## Tip

The **'Back'** button and the **'Home'** and **'Logout'** hyperlinks appear on most pages of the TRIP application. Their functions (as described above) are the same wherever they are found.

## What you see (when you click 'Search')




## What You Should Do Next

- View a summary of all the debts certified by your agency for this particular debtor.
- Click a **'Debt No.'** hyperlink to view the details of a single debt.
- Click the **'Debt Details for all Debts'** button to view the details of all the debts for this debtor.
- Click **'Next'** to go to the next 10 debts on the list.
- Click **'End'** to go to the end of the list of debts.
- Click **'Previous'** to go to the previous 10 debts on the list.

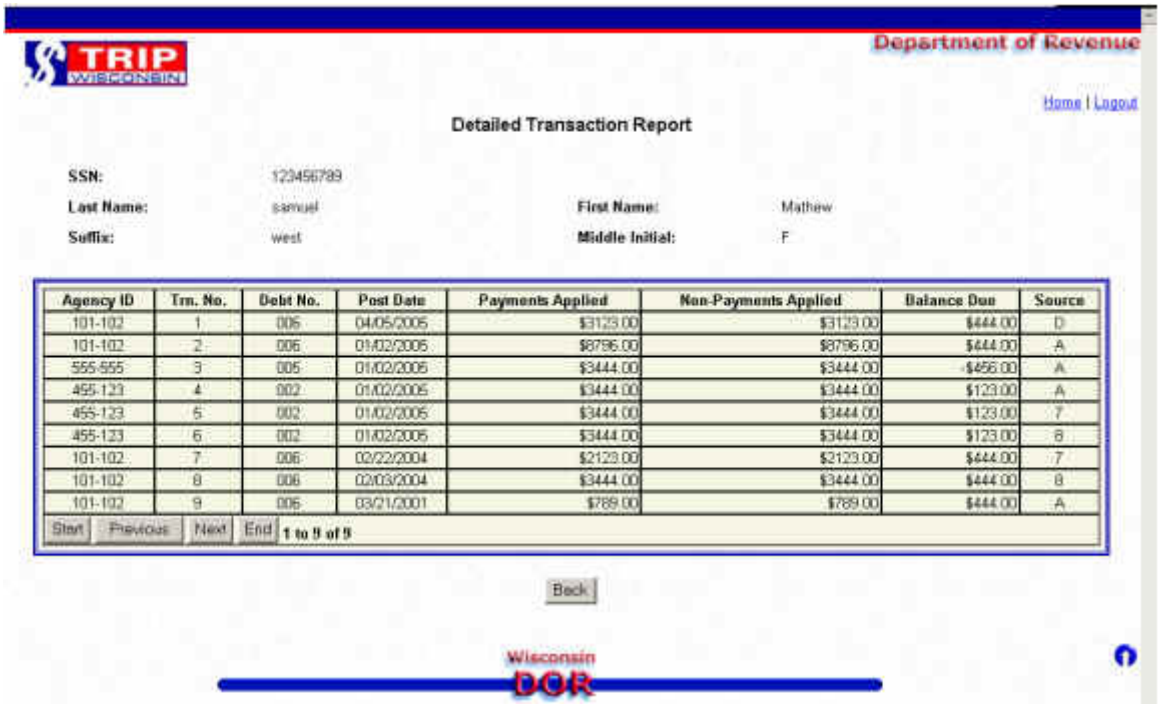
- Click **'Start'** to go to the beginning of the list of debts.

### What You See (when you click on a 'Debt No.' hyperlink)

### What You Should Do Next

- Click **'Next'** to go to the next 10 transactions.
- Click **'End'** to go to the end of the list of transactions.
- Click **'Previous'** to go to the previous 10 transactions.
- Click **'Start'** to go to the beginning of the list of transactions.

## What You See (when you click on the 'Details for all Debts' button)



TRIP WISCONSIN

Department of Revenue

Home | Logout

Detailed Transaction Report

SSN: 123456789

Last Name: samuel

First Name: Mathew

Suffix: west

Middle Initial: F

| Agency ID | Trn. No. | Debt No. | Post Date | Payments Applied | Non-Payments Applied | Balance Due | Source |
|---|---|---|---|---|---|---|---|
| 101-102 | 1 | 006 | 04/05/2005 | $3123.00 | $3123.00 | $444.00 | D |
| 101-102 | 2 | 006 | 01/02/2005 | $8796.00 | $8796.00 | $444.00 | A |
| 555-555 | 3 | 005 | 01/02/2005 | $3444.00 | $3444.00 | -$456.00 | A |
| 455-123 | 4 | 002 | 01/02/2005 | $3444.00 | $3444.00 | $123.00 | A |
| 455-123 | 5 | 002 | 01/02/2005 | $3444.00 | $3444.00 | $123.00 | 7 |
| 455-123 | 6 | 002 | 01/02/2005 | $3444.00 | $3444.00 | $123.00 | 8 |
| 101-102 | 7 | 006 | 02/22/2004 | $2123.00 | $2123.00 | $444.00 | 7 |
| 101-102 | 8 | 006 | 02/03/2004 | $3444.00 | $3444.00 | $444.00 | 8 |
| 101-102 | 9 | 006 | 03/21/2001 | $789.00 | $789.00 | $444.00 | A |

Start Previous Next End 1 to 9 of 9

Back

Wisconsin DOR

## What You Should Do Next

- Click **'Next'** to go to the next 10 transactions.
- Click **'End'** to go to the end of the list of transactions.
- Click **'Previous'** to go to the previous 10 transactions.
- Click **'Start'** to go to the beginning of the list of transactions.

# Account Summary

### What You Should Do

- Click on the **'Account Summary'** button on the Main Menu page.

### What You See

### What You Can Do Here

- You can view the account summary of a particular agency.
- Export the file to Excel, XML or Text format based on your preference.

### What You Should Do

- Select an **'Agency ID'** and choose either **'All Records'**, **'Balance > 0.00'**, or **'Balance = 0.00'**.

## What You See

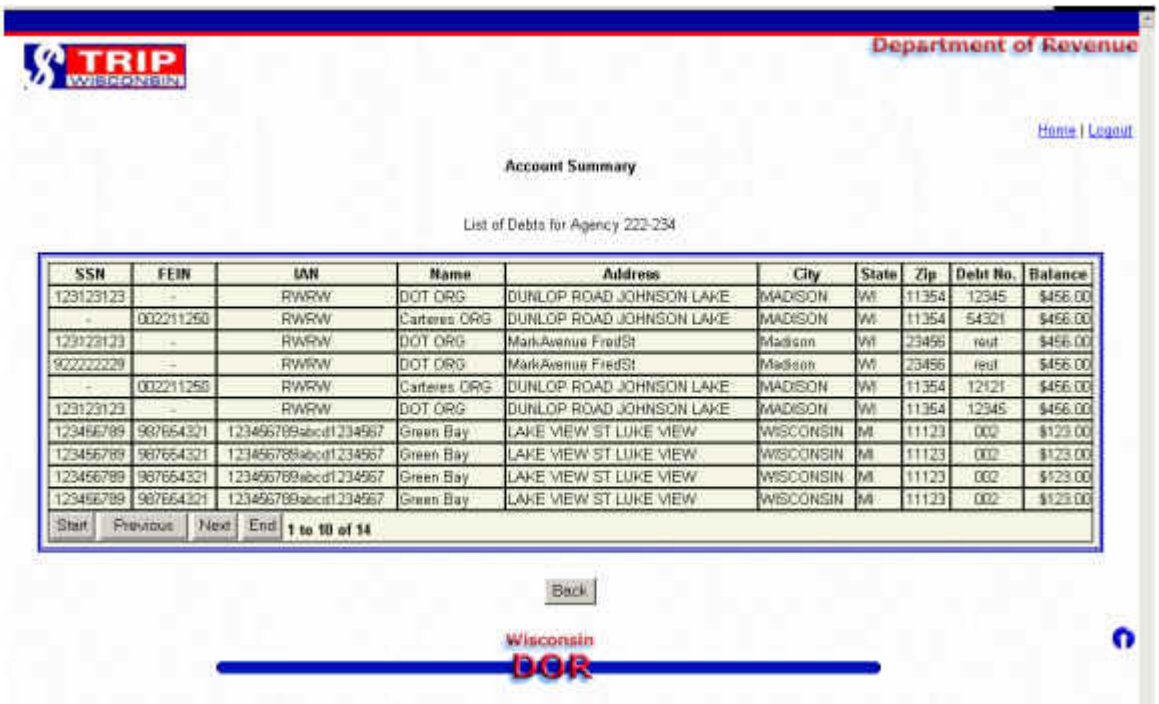
## What You Should Do Next

- Click **'View File'** to generate the file in HTML format.

## Tip

To convert the file to Excel, XML or Text format, click on the appropriate button after selecting an **'Agency ID'** and record type. An **'Open Save'** dialog box appears asking you to open or save the file. Choose the option you want and follow the instructions in the dialog box.

## What You See (when you click on 'View File')




| SSN | FEIN | IAN | Name | Address | City | State | Zip | Debt No. | Balance |
|---|---|---|---|---|---|---|---|---|---|
| 123123123 | - | RWRW | DOT ORG | DUNLOP ROAD JOHNSON LAKE | MADISON | WI | 11354 | 12345 | $456.00 |
| - | 002211250 | RWRW | Carteres ORG | DUNLOP ROAD JOHNSON LAKE | MADISON | WI | 11354 | 54321 | $456.00 |
| 123123123 | - | RWRW | DOT ORG | MarkAvenue FredSt | Madison | WI | 23456 | rest | $456.00 |
| 922222229 | - | RWRW | DOT ORG | MarkAvenue FredSt | Madison | WI | 23456 | rest | $456.00 |
| - | 002211250 | RWRW | Carteres ORG | DUNLOP ROAD JOHNSON LAKE | MADISON | WI | 11354 | 12121 | $456.00 |
| 123123123 | - | RWRW | DOT ORG | DUNLOP ROAD JOHNSON LAKE | MADISON | WI | 11354 | 12345 | $456.00 |
| 123456789 | 987654321 | 123456789abcd1234567 | Green Bay | LAKE VIEW ST LUKE VIEW | WISCONSIN | MI | 11123 | 002 | $123.00 |
| 123456789 | 987654321 | 123456789abcd1234567 | Green Bay | LAKE VIEW ST LUKE VIEW | WISCONSIN | MI | 11123 | 002 | $123.00 |
| 123456789 | 987654321 | 123456789abcd1234567 | Green Bay | LAKE VIEW ST LUKE VIEW | WISCONSIN | MI | 11123 | 002 | $123.00 |
| 123456789 | 987654321 | 123456789abcd1234567 | Green Bay | LAKE VIEW ST LUKE VIEW | WISCONSIN | MI | 11123 | 002 | $123.00 |

## What You Should Do Next

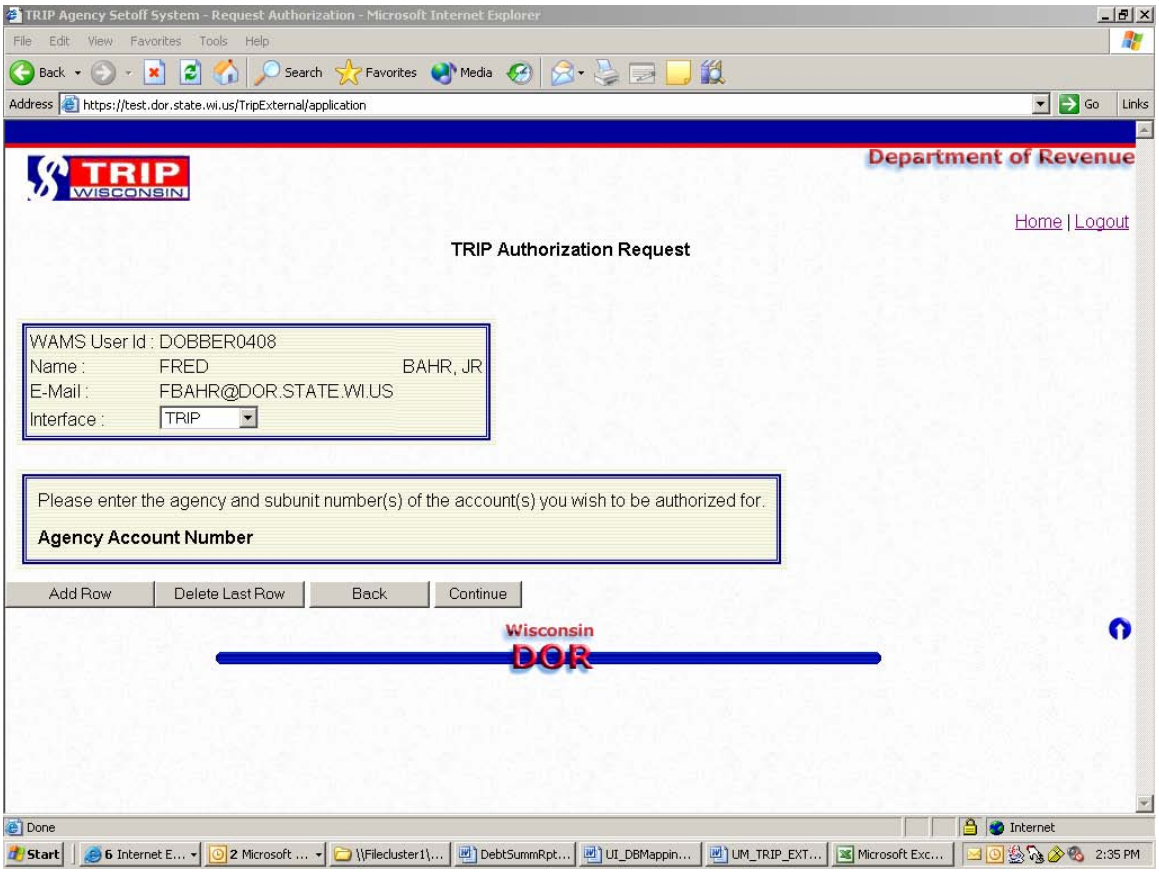
- View the records displayed.
- Click **'Next'** to go to the next 10 debts.
- Click **'End'** to go to the end of the list of debts.
- Click **'Previous'** to go the previous 10 debts.
- Click **'Start'** to go to the beginning of the list of debts.

# Request Authorization

## What You Should Do

- Click on the **'Request Authorization'** button on the Main Menu page.

## What You See



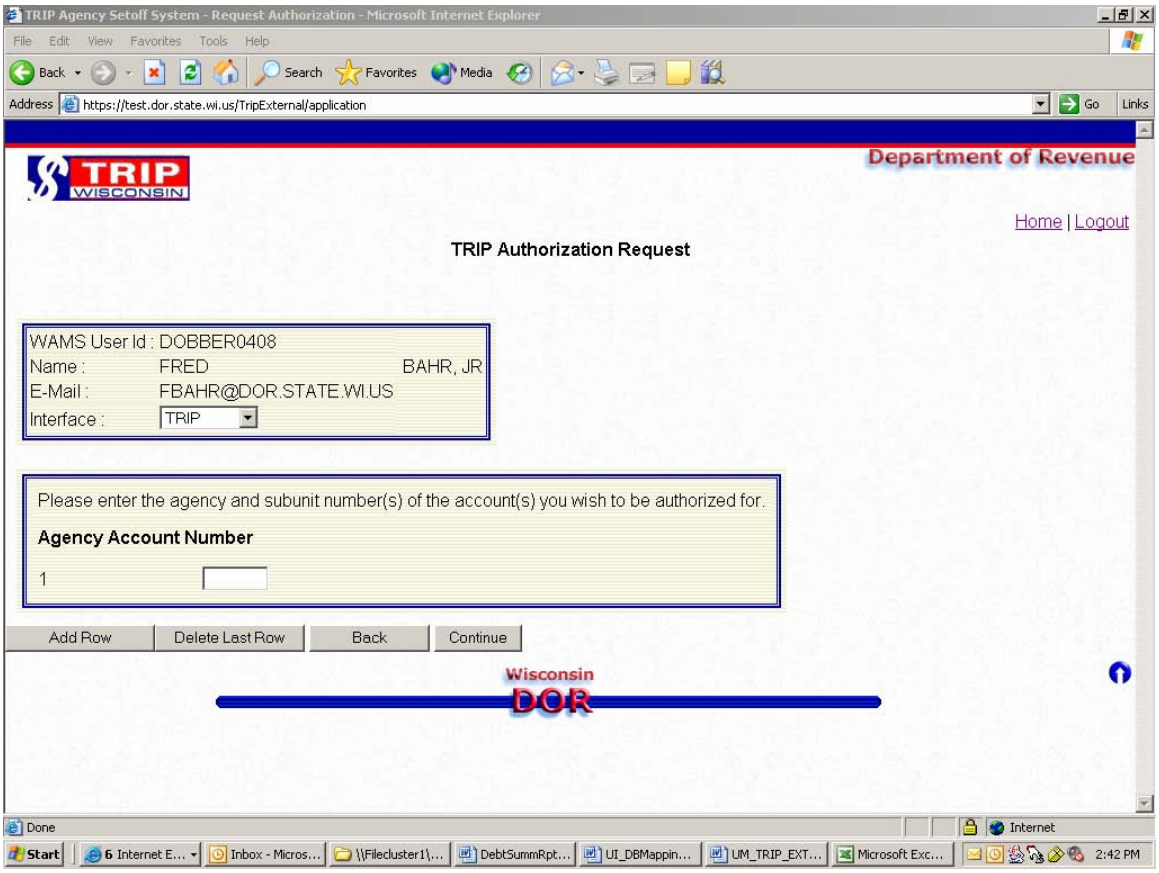

### What You Can Do Here

- Request access to another agency account.

## What You Should Do Next

- Select an **'Interface'** type from the drop-down menu (either TRIP, CCAP, IRS, or Mainframe) and then click **'Add Row'**.

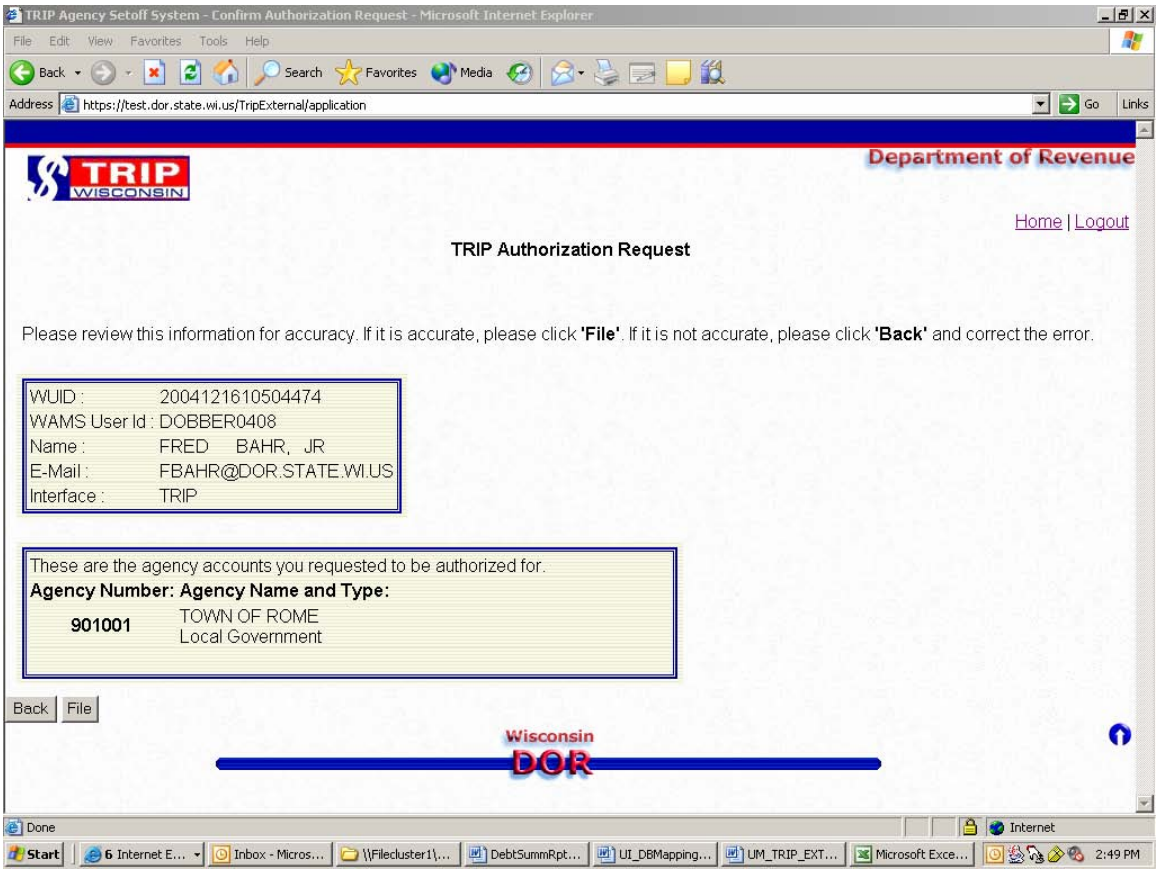
## What You See (when you click 'Add Row')




## & What You Should Do Next

- Enter the six-digit Agency ID number of the agency to which you want access and then click **'Add Row'** (if you want to request access to another agency account) or click **'Continue'**.
- Click **'Delete Last Row'** to delete the last row that was added.

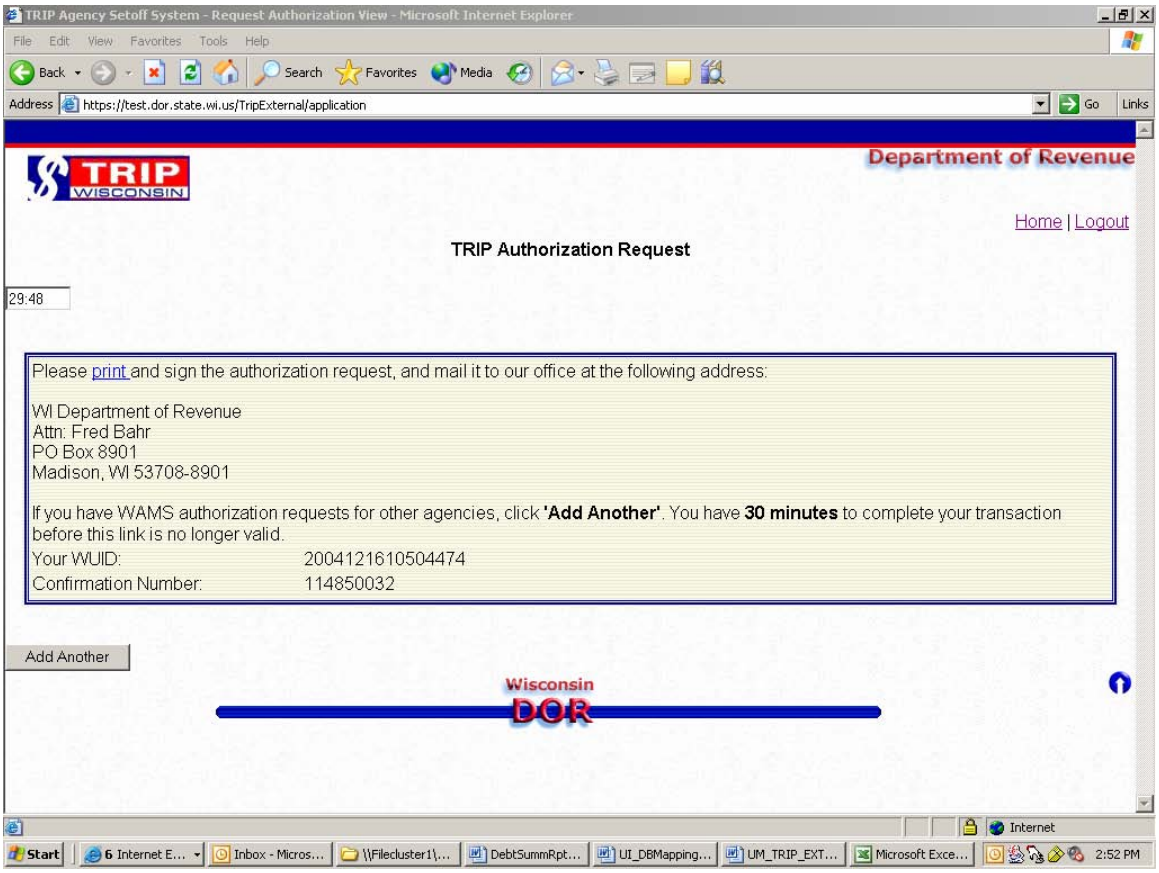
## What You See (when you click 'Continue)




## What You Should Do Next

- Click **'File'** to continue this process.

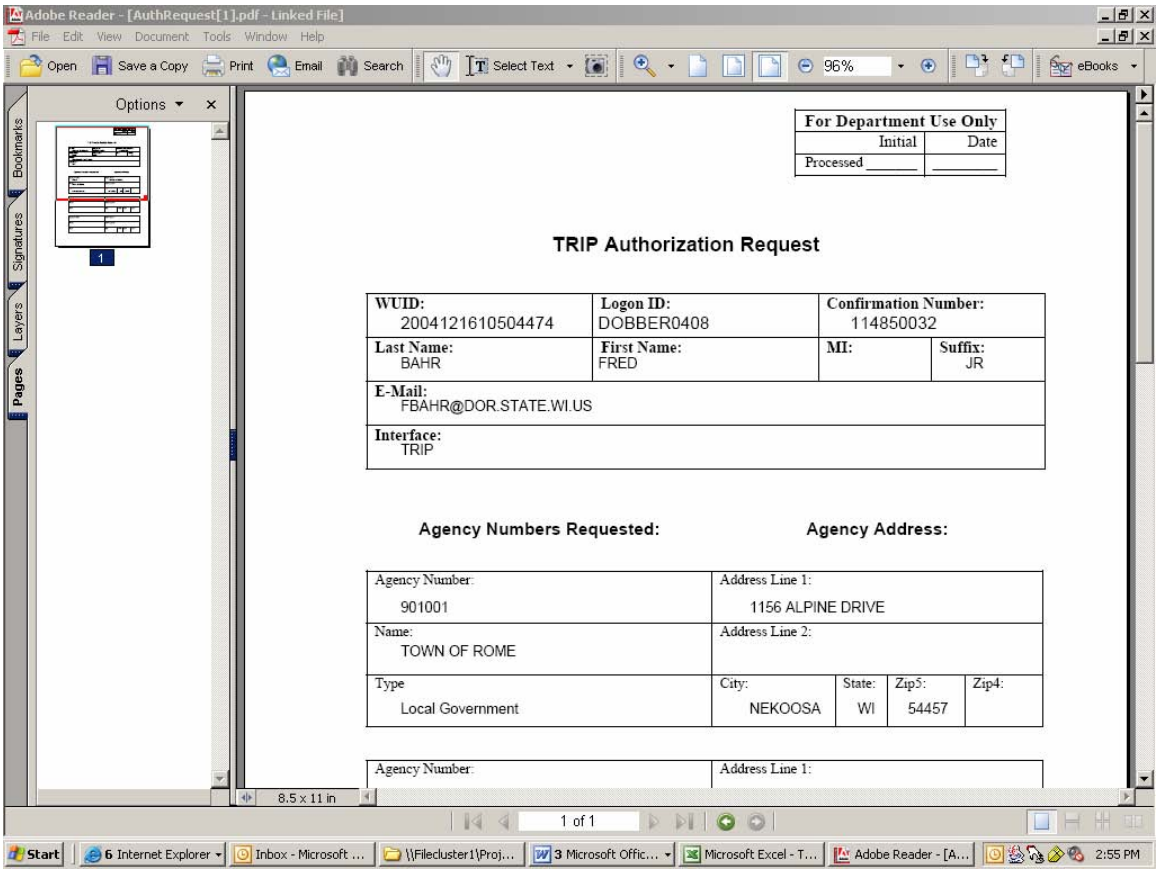
## What You See (when you click 'File')




## What You Should Do Next

- Click **'Print'** to continue this process.
- Click **'Add Another'** to return to the 'TRIP Authorization Request' page and repeat this process.

## What You See (when you click 'Print')



| For Department Use Only | |
|---|---|
| Initial | Date |
| Processed _____ | _____ |

**TRIP Authorization Request**

| | | | |
|---|---|---|---|
| **WUID:** 2004121610504474 | **Logon ID:** DOBBER0408 | **Confirmation Number:** 114850032 | |
| **Last Name:** BAHR | **First Name:** FRED | **MI:** | **Suffix:** JR |
| **E-Mail:** FBAHR@DOR.STATE.WI.US | | | |
| **Interface:** TRIP | | | |

**Agency Numbers Requested:** **Agency Address:**

| | | | | |
|---|---|---|---|---|
| Agency Number: 901001 | Address Line 1: 1156 ALPINE DRIVE | | | |
| Name: TOWN OF ROME | Address Line 2: | | | |
| Type Local Government | City: NEKOOSA | State: WI | Zip5: 54457 | Zip4: |
| Agency Number: | Address Line 1: | | | |

## What You Should Do Next

- Print and sign the authorization request form and mail it to DOR at the following address:

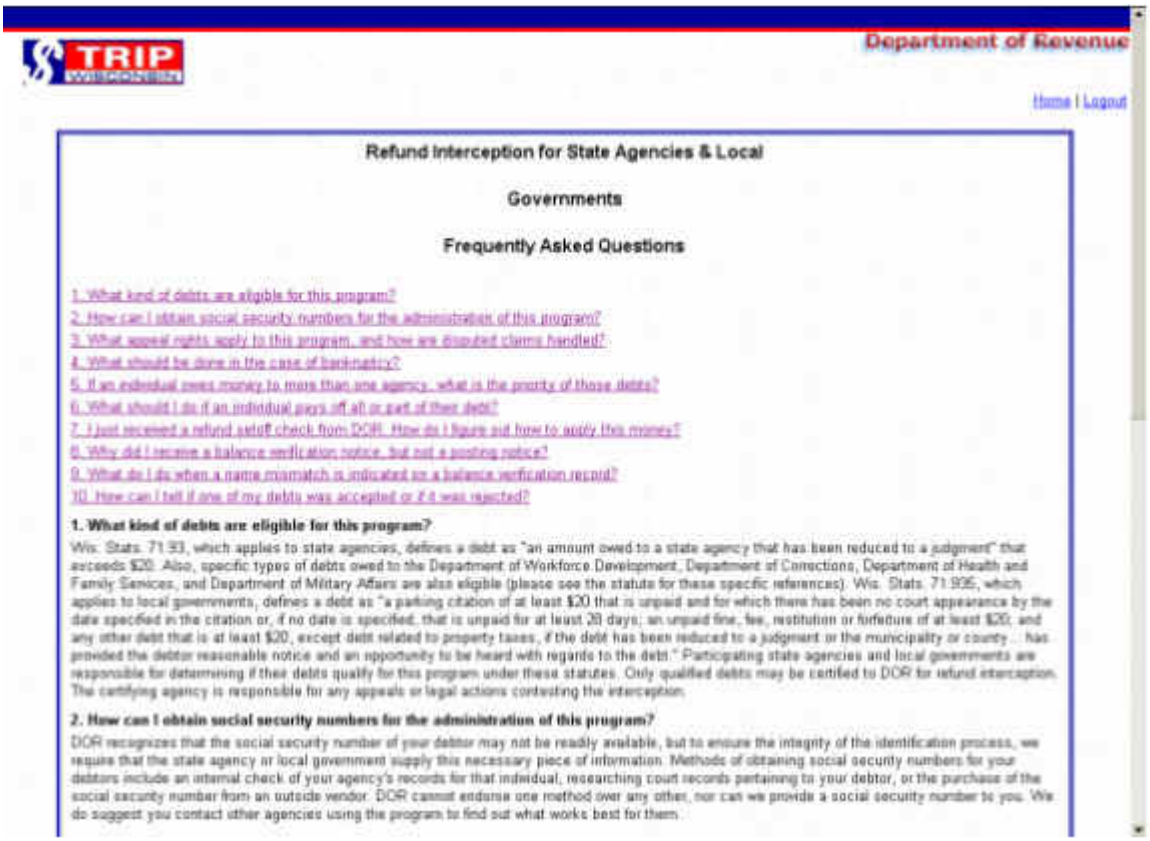
  WI Department of Revenue
  Attn: Fred Bahr
  PO Box 8901
  Madison, WI 53708-8901

# FAQ'S

## What You Should Do

- Click on the **'FAQ'** button on the Main Menu page.

## What You See




## What You Should Do Next

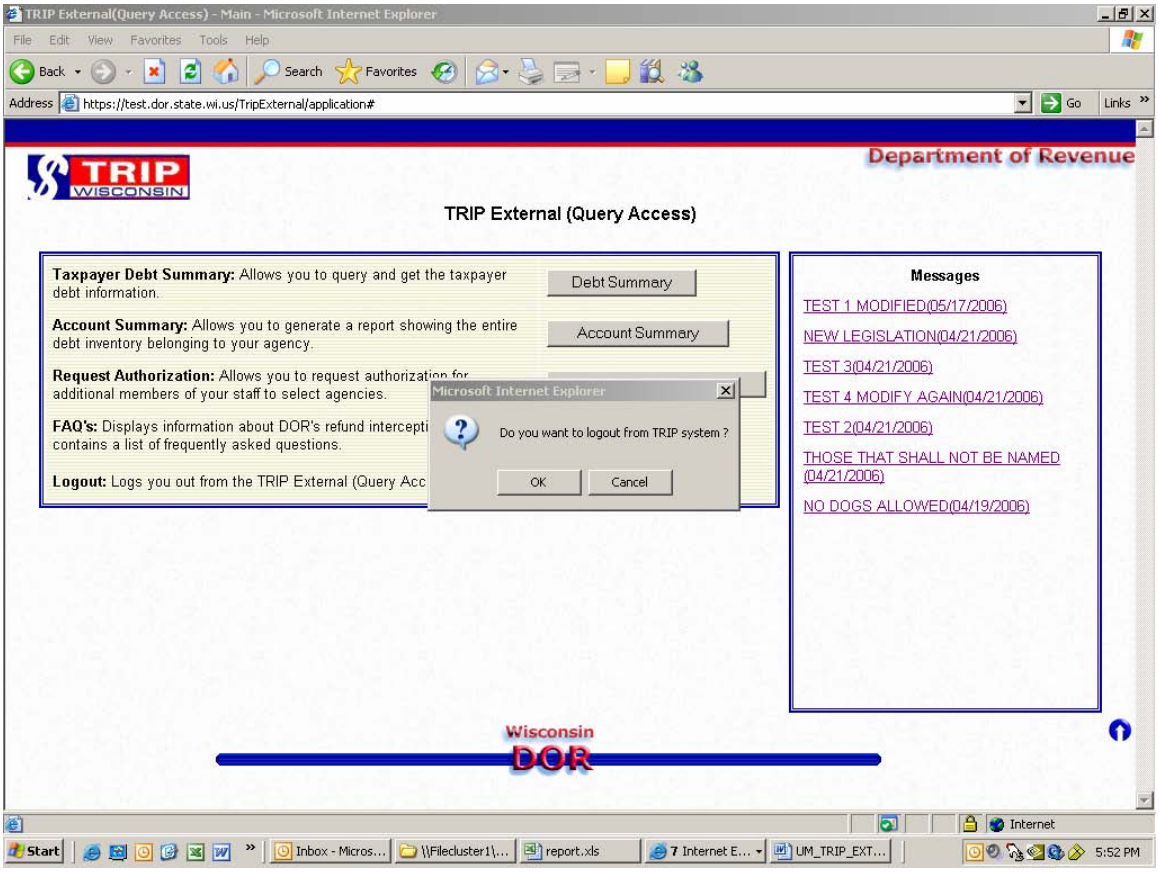
- Click on the link to a specific FAQ to go to the answer to that particular question.

# Logout

## What You Should Do

- Click on the **'Logout'** button on the Main Menu page.

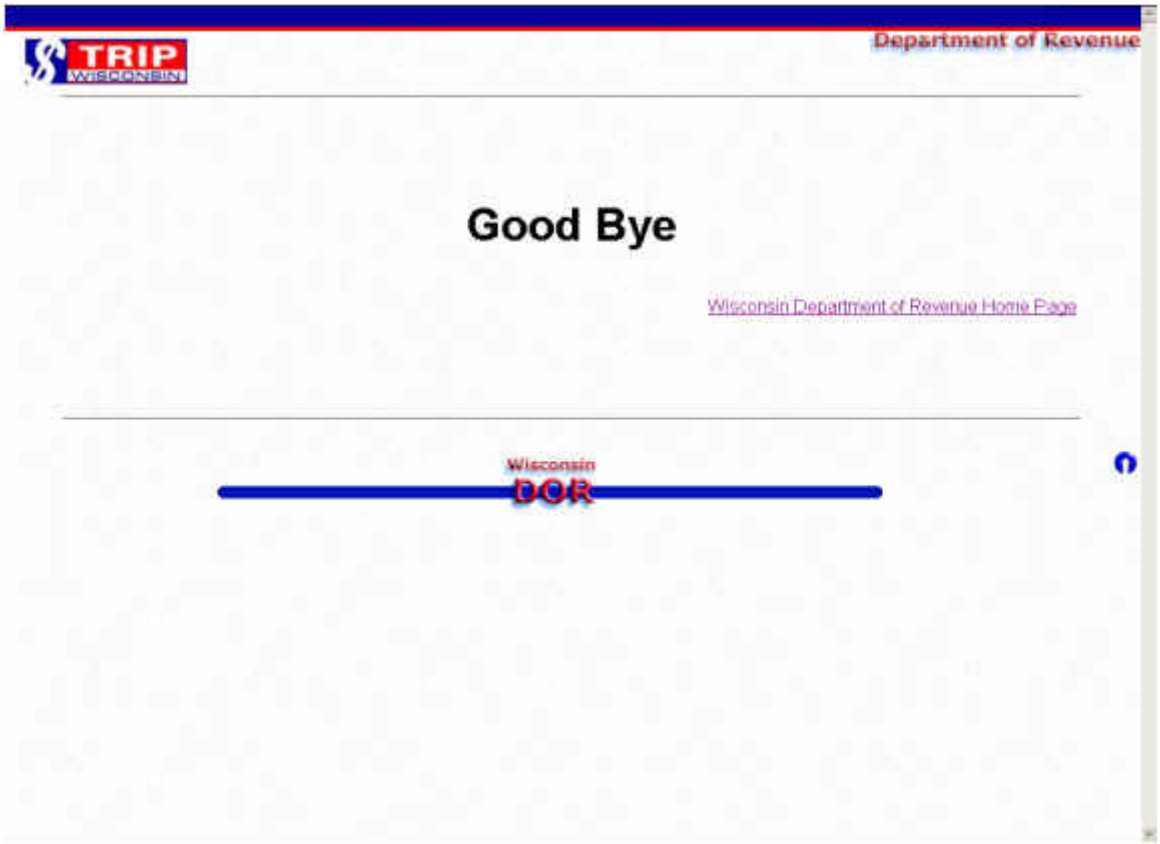
## What You See




## What You Should Do Next

- Click **'OK'** to log out from the TRIP system.
- Click **'Cancel'** if you choose not to exit the system at this time.

## What You See




## What You Should Do Next

- Click on the **'Wisconsin Department of Revenue Home Page'** hyperlink, or close your browser session.

# APPENDIX

## Account Summary file record layout received from DOR

This report lists all of the debts currently in our system that were certified by your agency.

| Field Name | Description | Starting Position | Length | Field Type |
|---|---|---|---|---|
| SSN | Social Security Number | 1 | 9 | CHAR |
| FEIN | Federal Identification Number | 10 | 9 | CHAR |
| DLN | Drivers License Number | 19 | 14 | CHAR |
| IAN | Internal Agency Number | 33 | 20 | CHAR |
| Last Name | Taxpayer Last Name | 53 | 20 | CHAR |
| Last Name Suffix | Taxpayer Last Name Suffix | 73 | 5 | CHAR |
| First Name | Taxpayer First Name | 78 | 20 | CHAR |
| Middle Initial | Taxpayer Middle Initial | 98 | 1 | CHAR |
| Address Line 1 | Street Address | 99 | 40 | CHAR |
| City | City | 139 | 40 | CHAR |
| State | State Abbreviation | 179 | 2 | CHAR |
| Zip Code | Zip Code | 181 | 5 | CHAR |
| Zip Code Extension | Zip Code Extension | 186 | 4 | CHAR |
| Debt Number | Assigned by DOR | 190 | 5 | CHAR |
| Current Balance | Account Balance | 195 | 1 | DECIMAL |

## Notes