Wisconsin Department of Revenue

My Case Manager User Guide

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My Case Manager User Guide

Taxpayers with an Open Audit

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Using My Tax Account

This guide is for My Tax Account users wishing to view audit information.

If you already have a My Tax Account profile, all you have to do to get started with My Case Manager is log in and follow the instructions in this guide. If not, review the [Using My Tax Account – Business Users]() guide for assistance.

Using My Case Manager

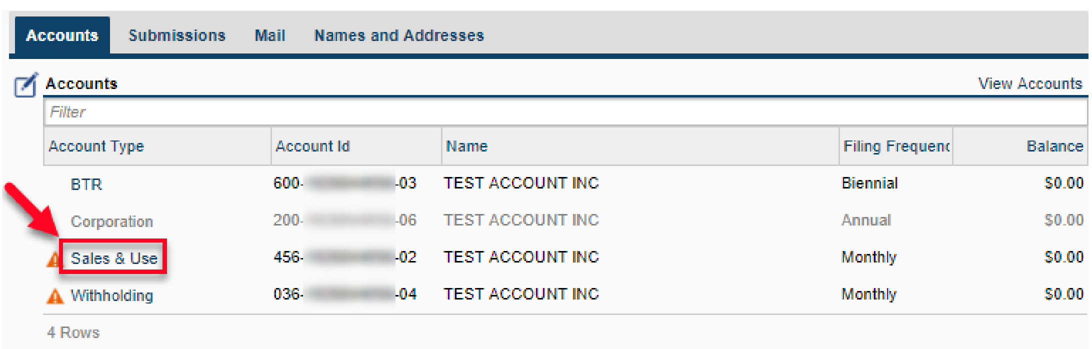
My Case Manager is designed to help you manage and understand the status of your audit. This feature allows you to see audit stage, requests, helpful resources, and history. It also contains contact information for your auditor and your auditor's supervisor.

My Case Manager is available for field audits of the following tax types:

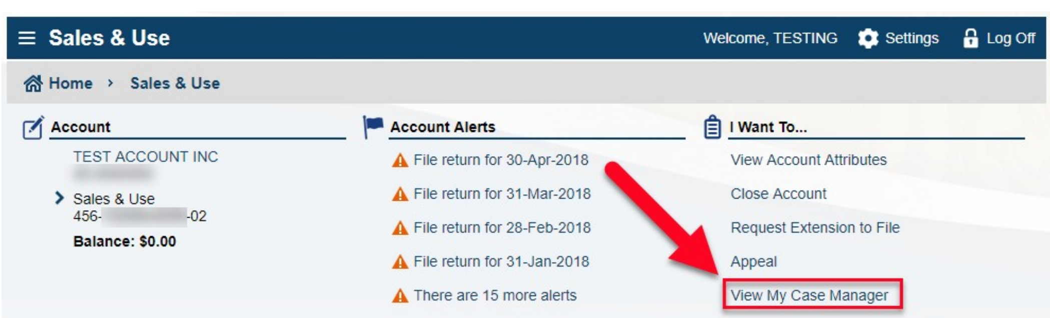
- Corporation Franchise or Income Tax
- Partnership
- Pass-Through Withholding
- Sales & Use
- Local Exposition Tax
- All Excise Tax Types

Navigate to My Case Manager

After logging into your My Tax Account profile, select the account for which you want to view audit information.

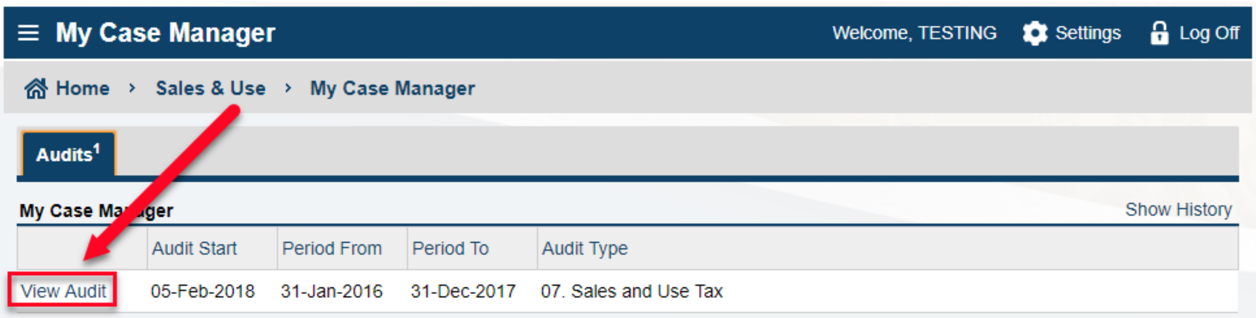


Under the "I Want To…" heading on the top right, click "View My Case Manager."



View Your Audit Information

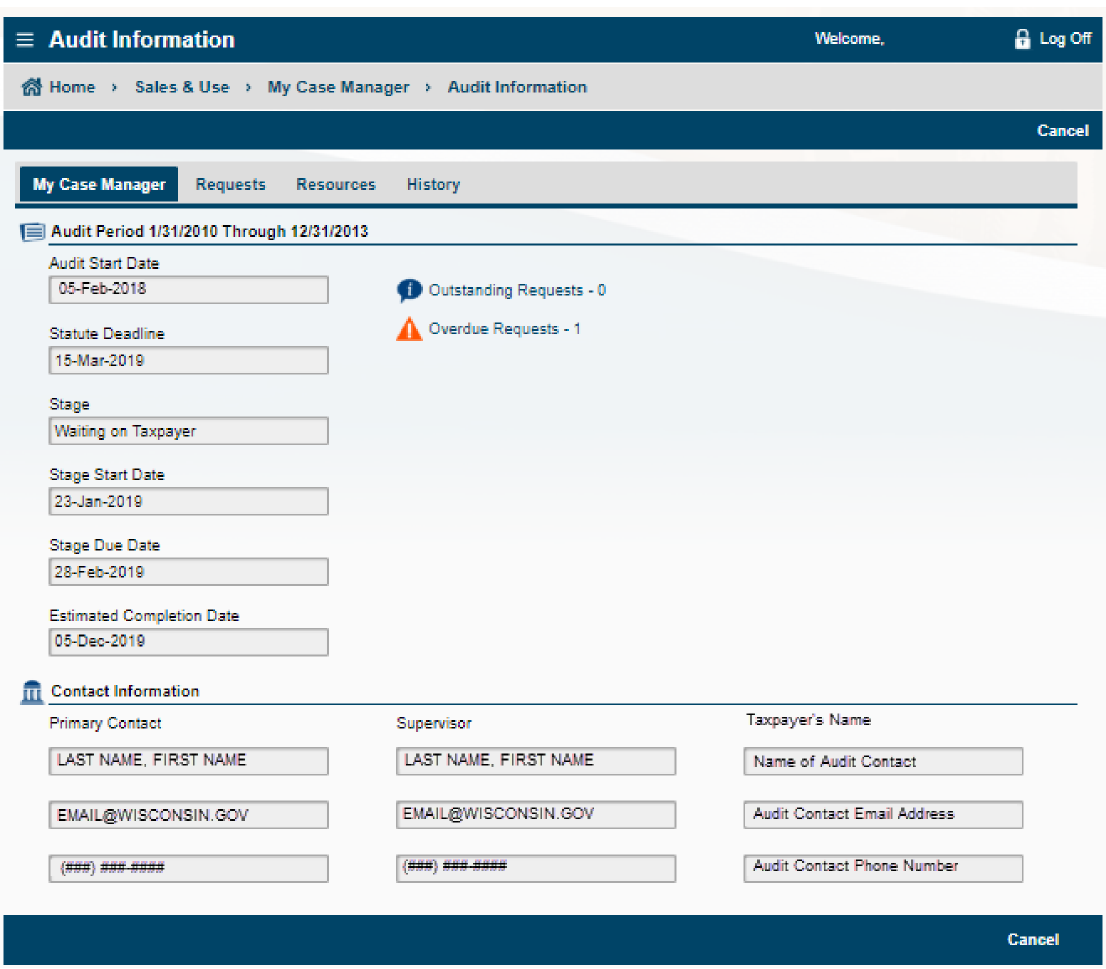
Click "View Audit" for the audit you want to view.



Use the tabs across the top to navigate through My Case Manager.

My Case Manager Tab

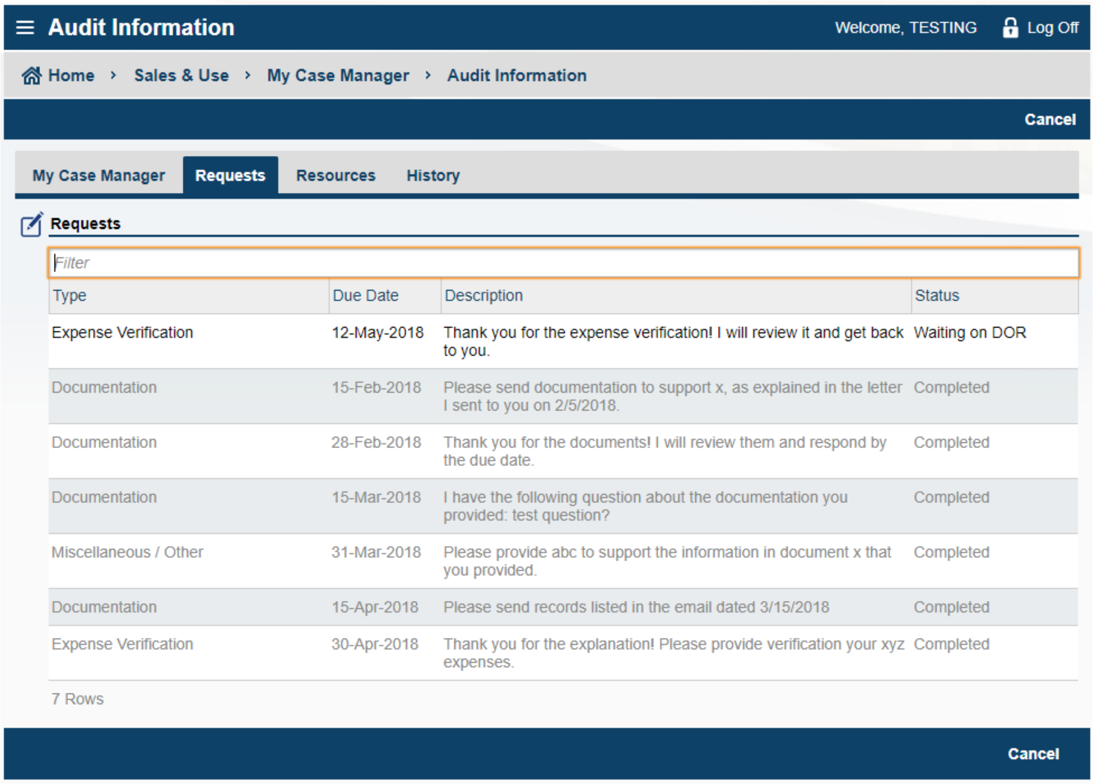
The My Case Manager tab shows a summary of audit information, including the audit start date, statute deadline, audit stage, stage start date, stage due date, and estimated completion date. Contact information for your auditor and the auditor's supervisor appears at the bottom of the page. If any outstanding or overdue requests exist, you will see a link to the right showing the number of outstanding and overdue requests. Click the link or the Requests tab to navigate to the list of requests.



Requests Tab

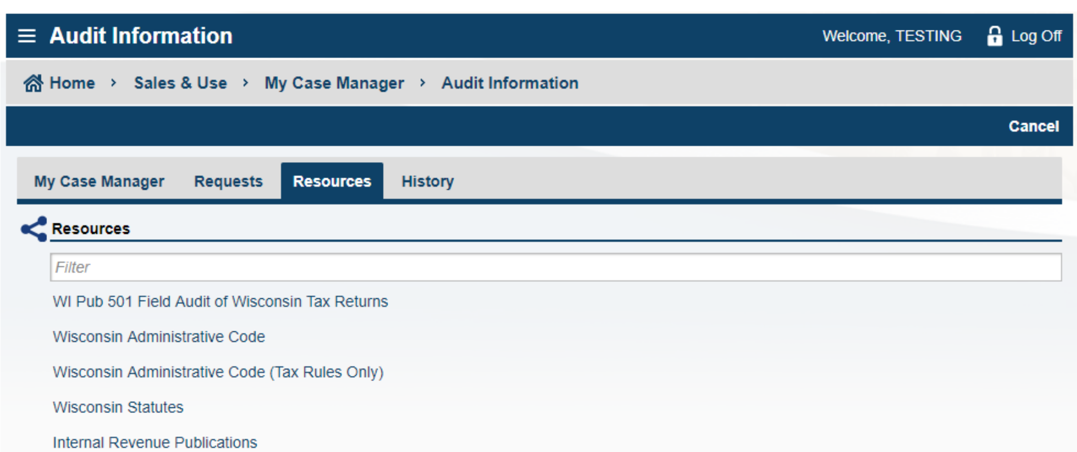
The Requests tab lists all requests entered by the auditor and shows a due date, description, and status for each one. If you have questions about any of the listed requests, contact your auditor.

NOTE: The status of a request is not always the same as the stage of the audit. It is possible to have an outstanding request in the "Waiting on Taxpayer" stage at the same time as an outstanding request in the "Waiting on DOR" stage. See the current stage of the audit in the My Case Manager tab, and stage history for the audit in the History tab.



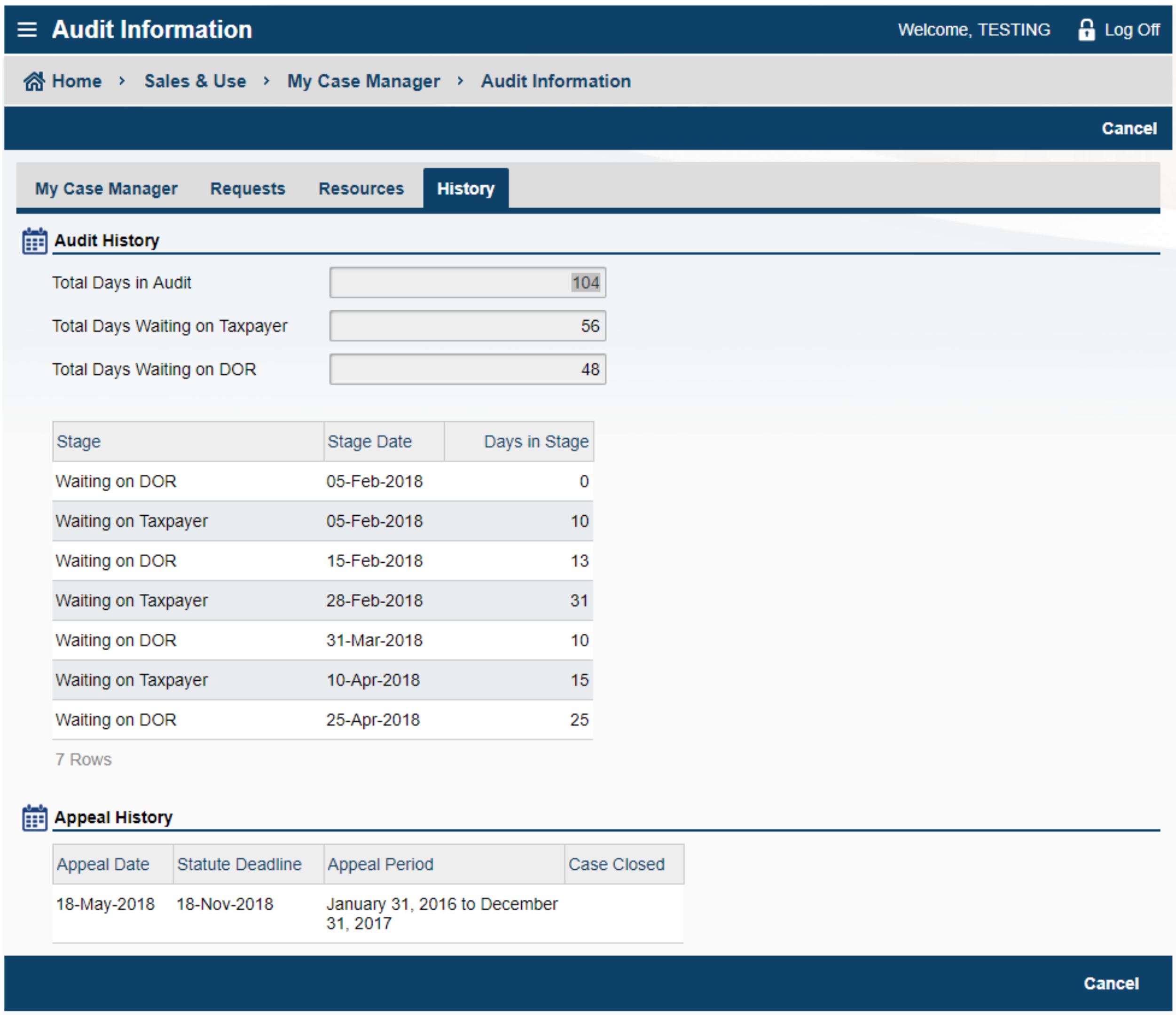
Resources Tab

The Resources tab contains links to publications and other resources that may be helpful to you during the audit.



History Tab

Click the History tab to see a summary of stage history for your audit. If you file an appeal, you will also see an Appeal History section at the bottom of this screen. Remember, audit stage is different from request status. See the Requests tab for the status of your requests.



Questions about My Case Manager

Visit our Common Questions page or contact your auditor if you have questions about My Case Manager.