



# My Case Manager User Guide

# 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.

Account Type	Account Id	Name	Filing Frequency	Balance
BTR	600- -03	TEST ACCOUNT INC	Biennial	\$0.00
Corporation	200- -06	TEST ACCOUNT INC	Annual	\$0.00
Sales & Use	456- -02	TEST ACCOUNT INC	Monthly	\$0.00
Withholding	036- -04	TEST ACCOUNT INC	Monthly	\$0.00

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

Account Alerts

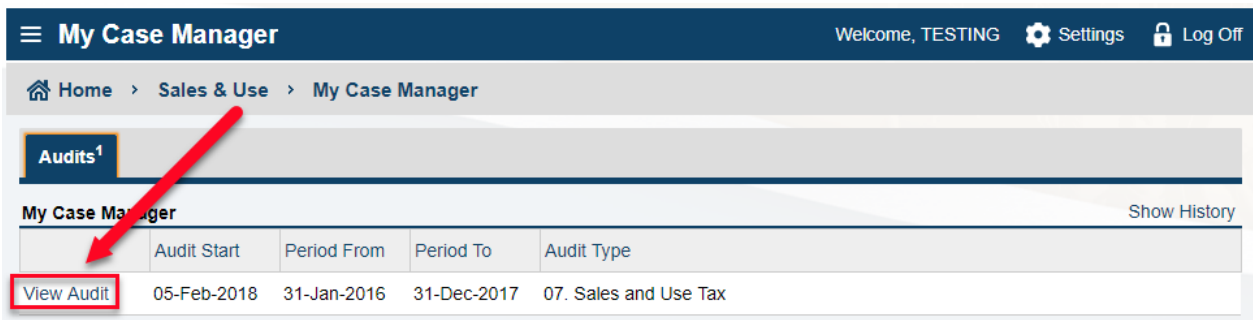
- File return for 30-Apr-2018
- File return for 31-Mar-2018
- File return for 28-Feb-2018
- File return for 31-Jan-2018
- There are 15 more alerts

I Want To...

- View Account Attributes
- Close Account
- Request Extension to File
- Appeal
- View My Case Manager**

## View Your Audit Information

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

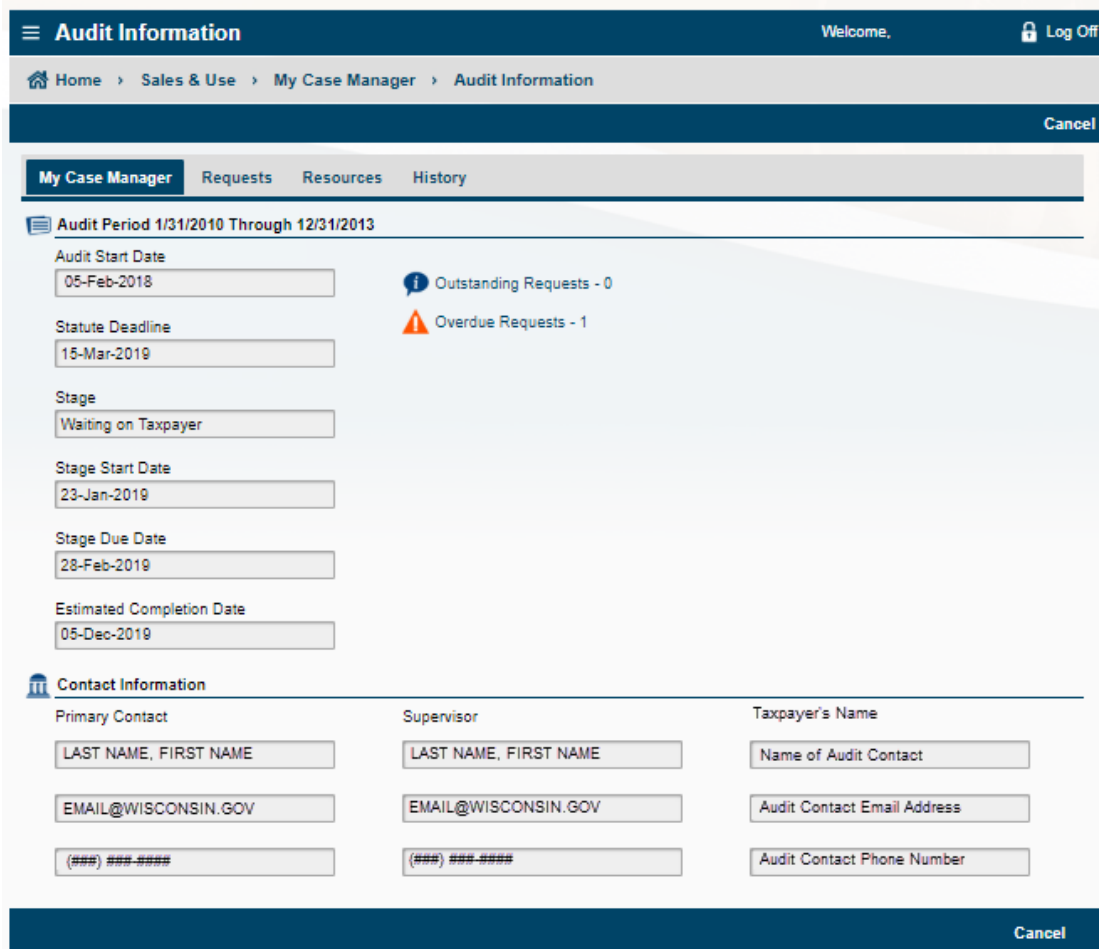


The screenshot shows the 'My Case Manager' interface. At the top, there is a navigation bar with 'My Case Manager' and user information 'Welcome, TESTING', 'Settings', and 'Log Off'. Below this is a breadcrumb trail: 'Home > Sales & Use > My Case Manager'. A tab labeled 'Audits<sup>1</sup>' is active. Underneath, there is a table with columns: 'View Audit', 'Audit Start', 'Period From', 'Period To', and 'Audit Type'. The first row contains the values: '05-Feb-2018', '31-Jan-2016', '31-Dec-2017', and '07. Sales and Use Tax'. A red arrow points from the 'Audits<sup>1</sup>' tab to the 'View Audit' button in the first row.

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.



The screenshot shows the 'Audit Information' page. At the top, there is a navigation bar with 'Audit Information' and user information 'Welcome,' and 'Log Off'. Below this is a breadcrumb trail: 'Home > Sales & Use > My Case Manager > Audit Information'. A 'Cancel' button is visible in the top right. The main content area has tabs: 'My Case Manager', 'Requests', 'Resources', and 'History'. The 'My Case Manager' tab is active. Below the tabs, there is a section titled 'Audit Period 1/31/2010 Through 12/31/2013'. This section contains several input fields for audit details: 'Audit Start Date' (05-Feb-2018), 'Statute Deadline' (15-Mar-2019), 'Stage' (Waiting on Taxpayer), 'Stage Start Date' (23-Jan-2019), 'Stage Due Date' (28-Feb-2019), and 'Estimated Completion Date' (05-Dec-2019). To the right of these fields, there are two status indicators: 'Outstanding Requests - 0' (with an information icon) and 'Overdue Requests - 1' (with a warning icon). Below this section is a 'Contact Information' section with three columns: 'Primary Contact', 'Supervisor', and 'Taxpayer's Name'. Each column has three input fields: 'LAST NAME, FIRST NAME', 'EMAIL@WISCONSIN.GOV', and '(###) ###-####'. A 'Cancel' button is visible at the bottom right.

## 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.

The screenshot shows the 'Requests' tab within the 'Audit Information' section. The page header includes 'Audit Information', 'Welcome, TESTING', and 'Log Off'. The breadcrumb trail is 'Home > Sales & Use > My Case Manager > Audit Information'. The 'Requests' tab is selected, with other tabs being 'My Case Manager', 'Resources', and 'History'. A search filter is present above a table of requests. The table has columns for Type, Due Date, Description, and Status. There are 7 rows of data.

Type	Due Date	Description	Status
Expense Verification	12-May-2018	Thank you for the expense verification! I will review it and get back to you.	Waiting on DOR
Documentation	15-Feb-2018	Please send documentation to support x, as explained in the letter I sent to you on 2/5/2018.	Completed
Documentation	28-Feb-2018	Thank you for the documents! I will review them and respond by the due date.	Completed
Documentation	15-Mar-2018	I have the following question about the documentation you provided: test question?	Completed
Miscellaneous / Other	31-Mar-2018	Please provide abc to support the information in document x that you provided.	Completed
Documentation	15-Apr-2018	Please send records listed in the email dated 3/15/2018	Completed
Expense Verification	30-Apr-2018	Thank you for the explanation! Please provide verification your xyz expenses.	Completed

## Resources Tab

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

The screenshot shows the 'Resources' tab within the 'Audit Information' section. The page header includes 'Audit Information', 'Welcome, TESTING', and 'Log Off'. The breadcrumb trail is 'Home > Sales & Use > My Case Manager > Audit Information'. The 'Resources' tab is selected, with other tabs being 'My Case Manager', 'Requests', and 'History'. A search filter is present above a list of resource links.

- WI Pub 501 Field Audit of Wisconsin Tax Returns
- Wisconsin Administrative Code
- Wisconsin Administrative Code (Tax Rules Only)
- Wisconsin Statutes
- Internal Revenue Publications

## 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.

**Audit Information** Welcome, TESTING Log Off

[Home](#) > [Sales & Use](#) > [My Case Manager](#) > [Audit Information](#)

**Cancel**

[My Case Manager](#) [Requests](#) [Resources](#) **History**

### Audit History

Total Days in Audit	<input type="text" value="104"/>
Total Days Waiting on Taxpayer	<input type="text" value="56"/>
Total Days Waiting on DOR	<input type="text" value="48"/>

Stage	Stage Date	Days in Stage
Waiting on DOR	05-Feb-2018	0
Waiting on Taxpayer	05-Feb-2018	10
Waiting on DOR	15-Feb-2018	13
Waiting on Taxpayer	28-Feb-2018	31
Waiting on DOR	31-Mar-2018	10
Waiting on Taxpayer	10-Apr-2018	15
Waiting on DOR	25-Apr-2018	25

7 Rows

### Appeal History

Appeal Date	Statute Deadline	Appeal Period	Case Closed
18-May-2018	18-Nov-2018	January 31, 2016 to December 31, 2017	

**Cancel**

## Questions about My Case Manager

Visit our [Common Questions page](#) or contact your auditor if you have questions about My Case Manager.