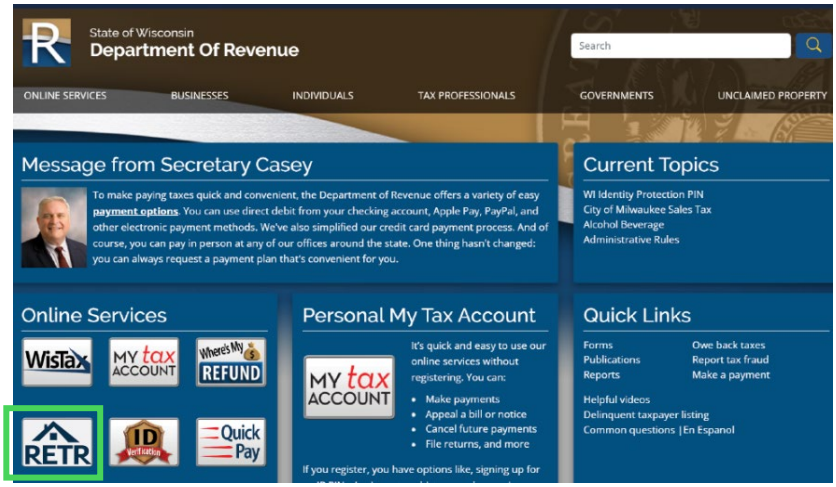
Additional Transfer Fee Amendment RETR Guide

This guide provides information on how to request a refund on a recorded real estate transfer return (RETR) in My Tax Account (MTA). The RETR **must** be recorded and transfer fee paid to request a refund.

- Before you get started, you will need:
  - Receipt Number (include hyphens)
  - Total Value of Real Estate or Sale Price
  - Last Name or Business Name of Grantor or Grantee
- Once you have your information, visit the DOR website – revenue.wi.gov and click the RETR icon under "Online Services"



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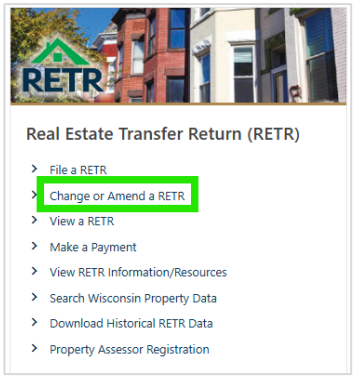
1. Locate Real Estate Transfer Return (RETR) section on the MTA home page

- Go to MTA – tap.revenue.wi.gov/mta/_/
- Scroll to the bottom of the page
- Select "Change or Amend a RETR"



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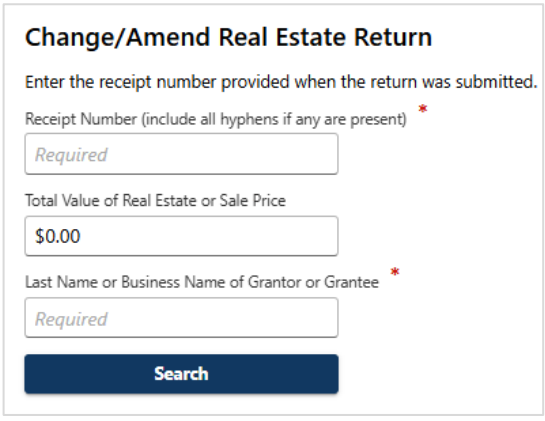
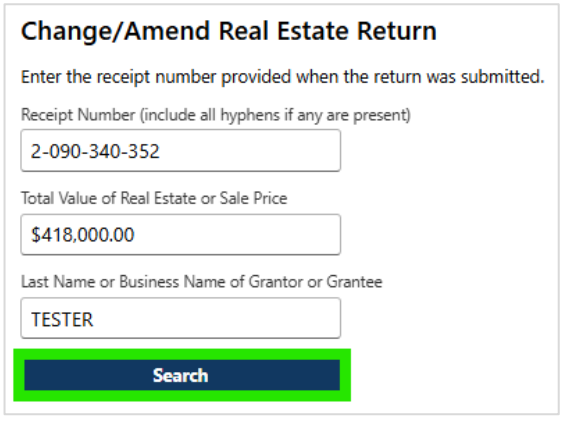
2. Complete the required fields, then select the "Search"





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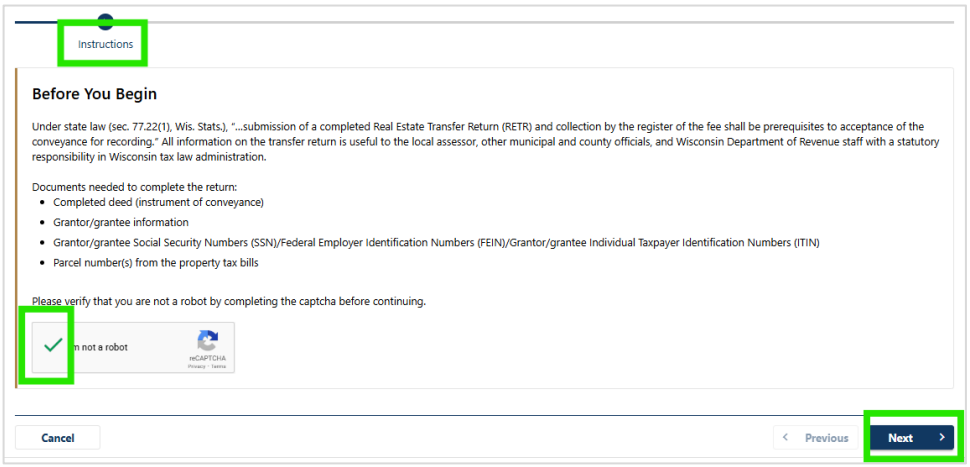
3. Instructions

- Read "Before You Begin" information
- Obtain documents needed to complete the refund amendment
- Select the "I'm not a robot" captcha box
- Click the "Next" button in the lower right-hand corner to continue



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4. County – since this RETR is already recorded the County cannot be changed. Select the Next button

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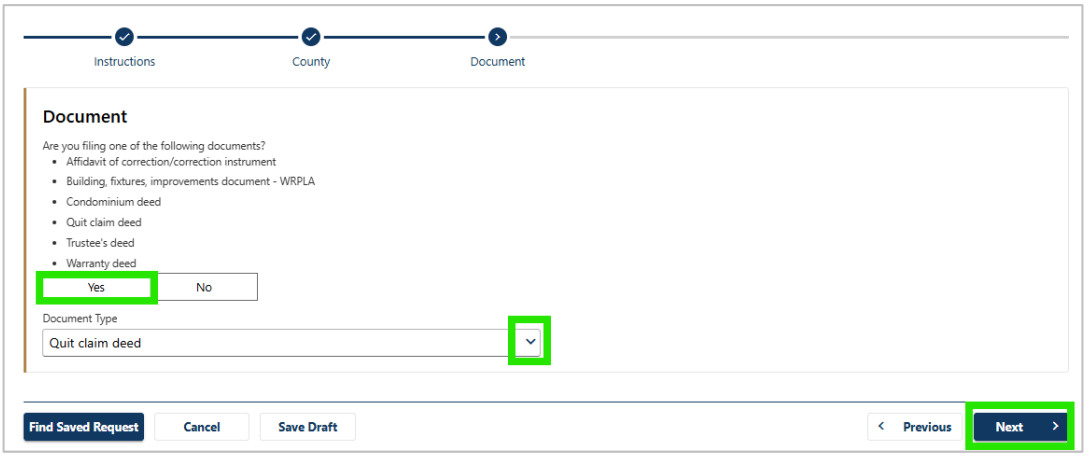
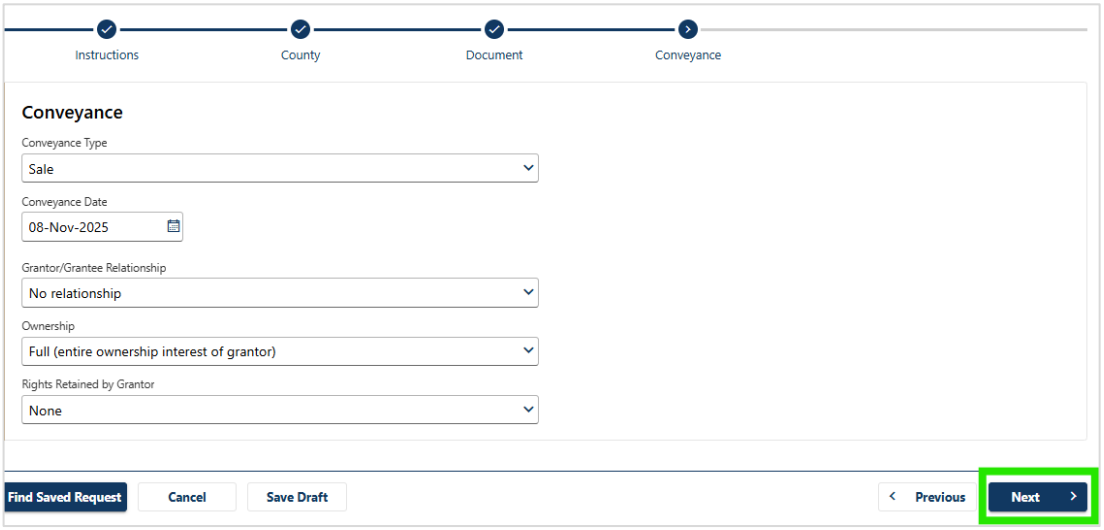
5. Document – update the document if needed, then select "Next"



6. Conveyance – update the conveyance information if needed, then select the Next button



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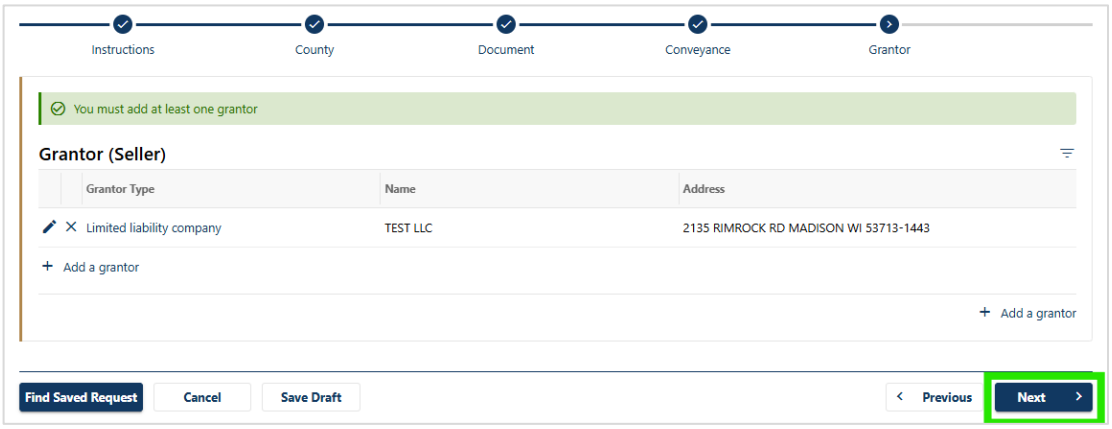
7. Grantor (Seller) – update the grantor information by selecting the pencil, if needed, then click "Next"



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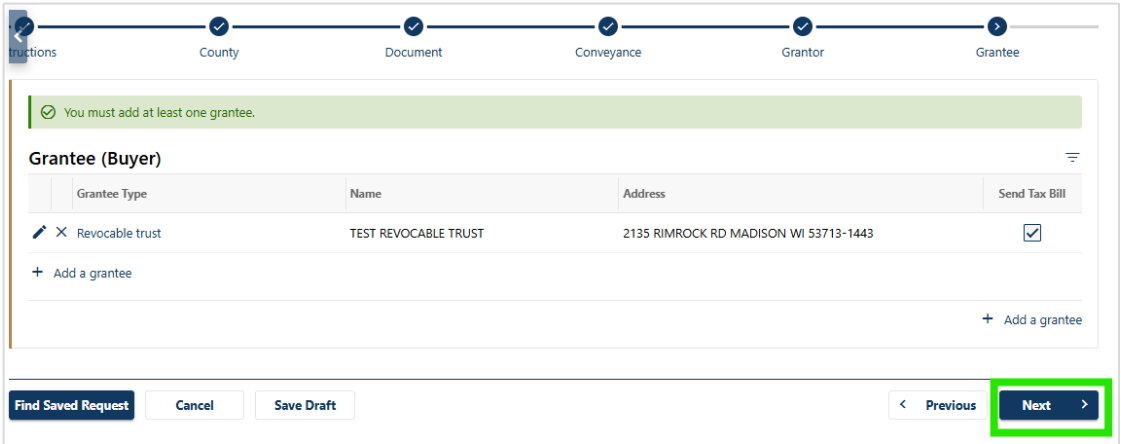
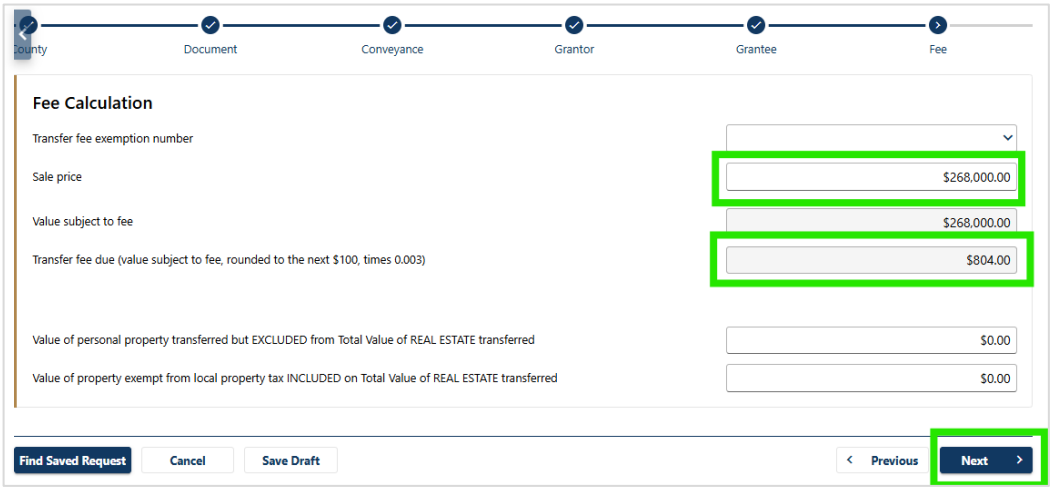
8. Grantee (Buyer) – update the Grantor information by selecting the pencil, if needed, then click "Next"

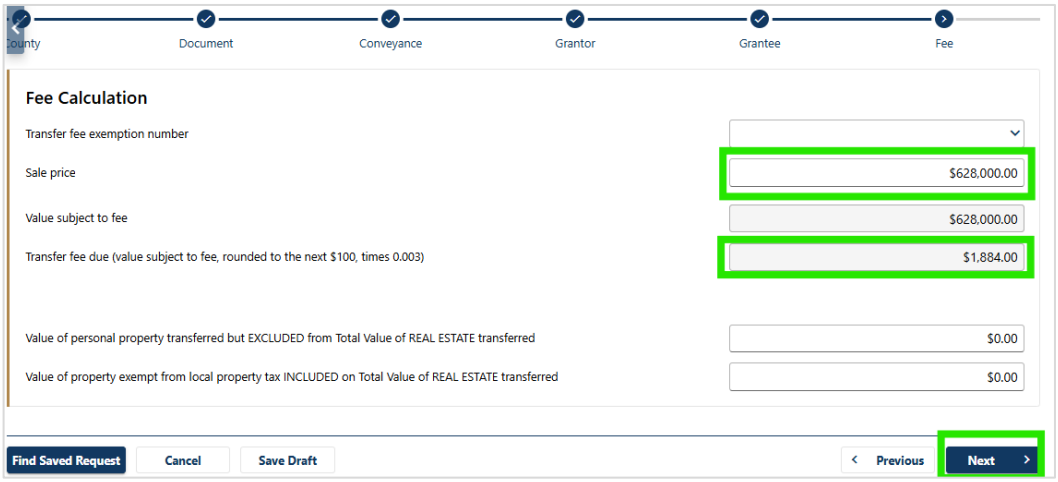


9. Fee Calculation

- Update the fee calculation page, then select "Next"
- In this example, the filer entered sale price $268,000 when the final closing statement supports $628,000
- **Original filing –** sale price $268,000 with transfer fee paid $804.00



- **Additional fee due amendment filing –** enter the correct sale price and the system will recalculate the transfer fee that should have been paid
- In this example, the correct sale price is $628,000; click "Next"



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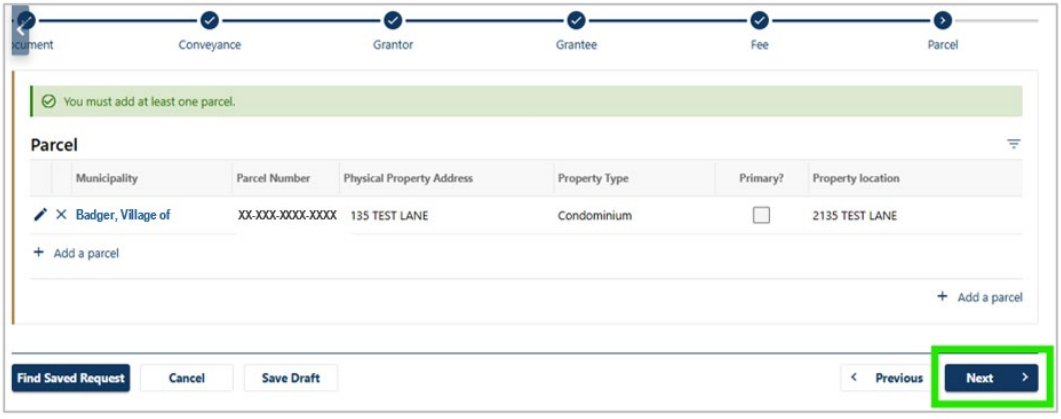
10. Parcel – update parcel information by clicking on the pencil if needed, then click "Next"



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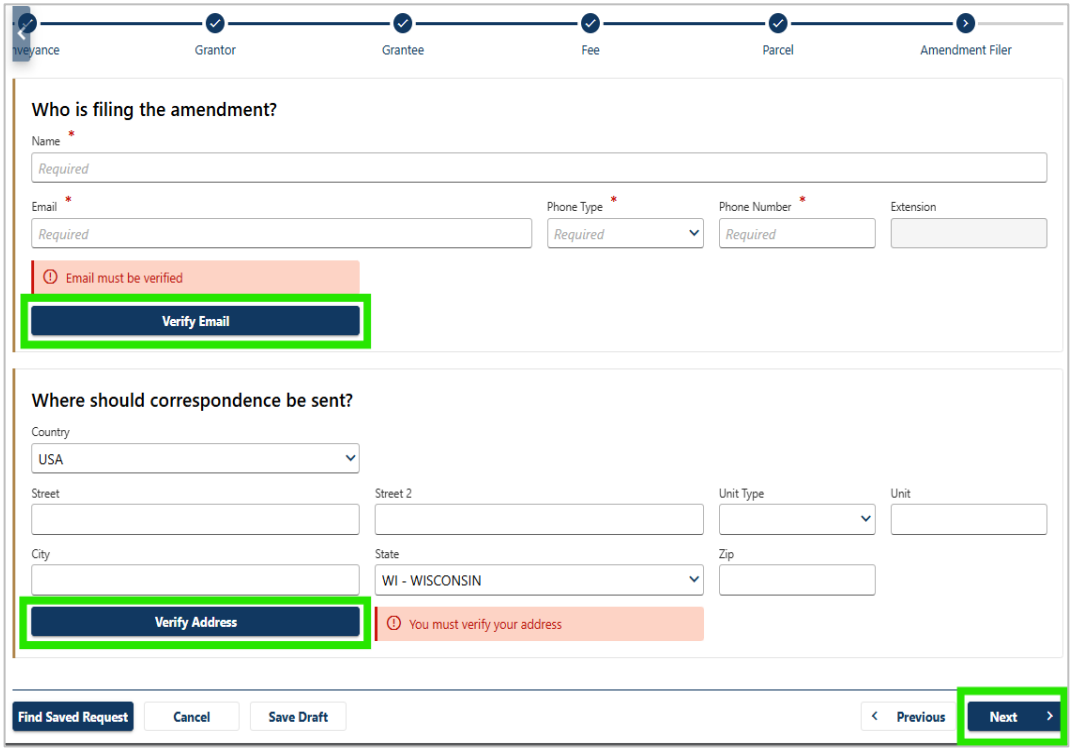
11. Amendment Filer – complete the required fields, select the verify buttons and click "Next"



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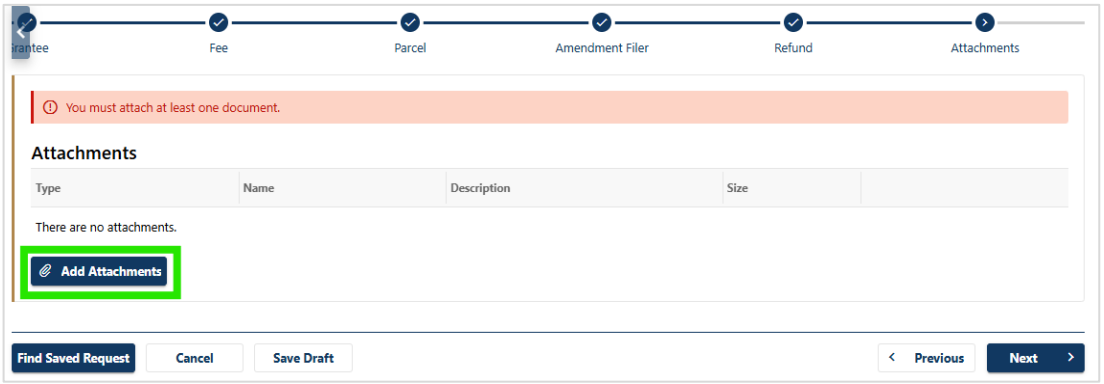
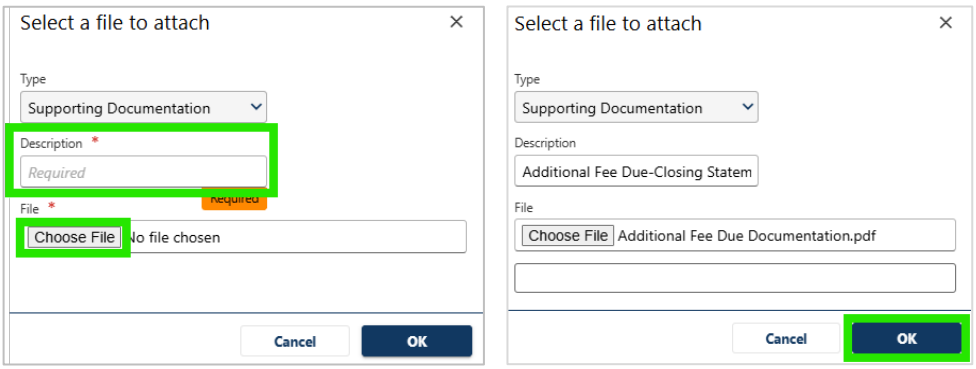
12. Attachments

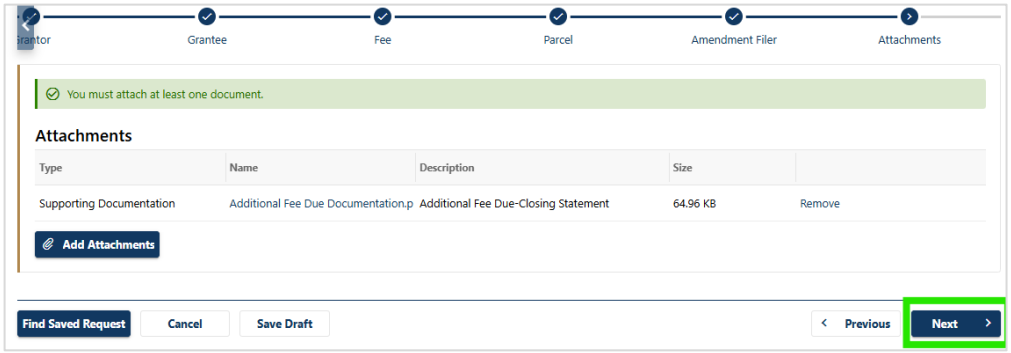
- You must provide documentation that will support the additional fee due amendment
- One common example to support a correction on a sale price is to provide a final closing statement
- Select "Add Attachments" to attach your supporting documentation



- When you select "Add Attachments," a window appears. Enter a description of your supporting documents and choose a file from your computer.
- After you enter your description and choose your file, select "OK"



- The attachment will now display in the Attachments table
- Once you have chosen all necessary attachments to support your refund, select "Next"



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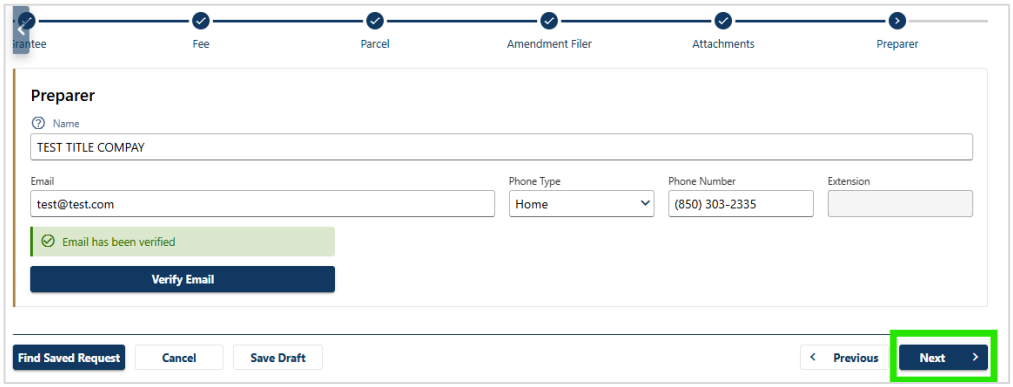
13. Preparer – update preparer information if needed, then click "Next"



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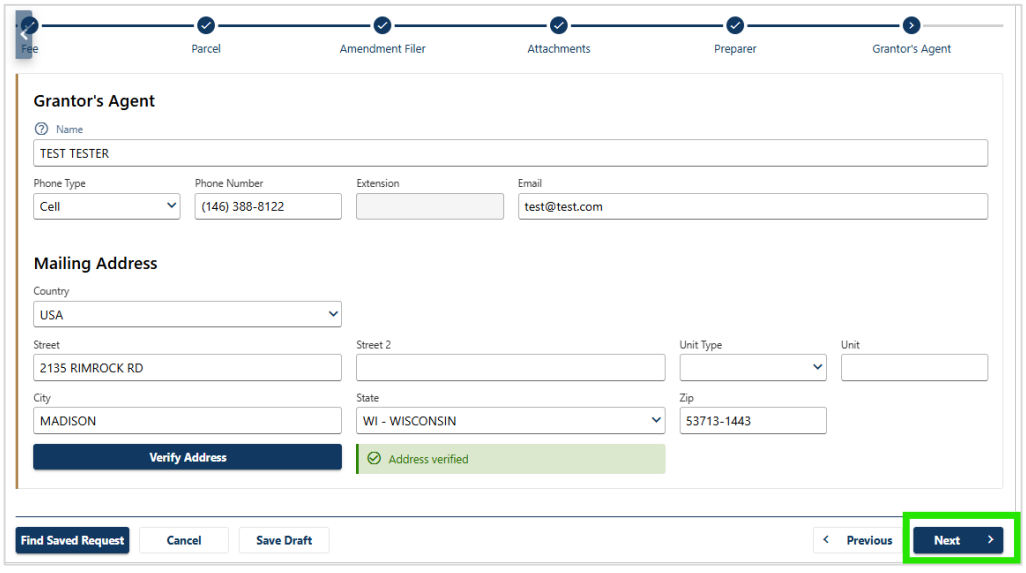
14. Grantor's Agent – update the grantor's agent information if needed, then click "Next"



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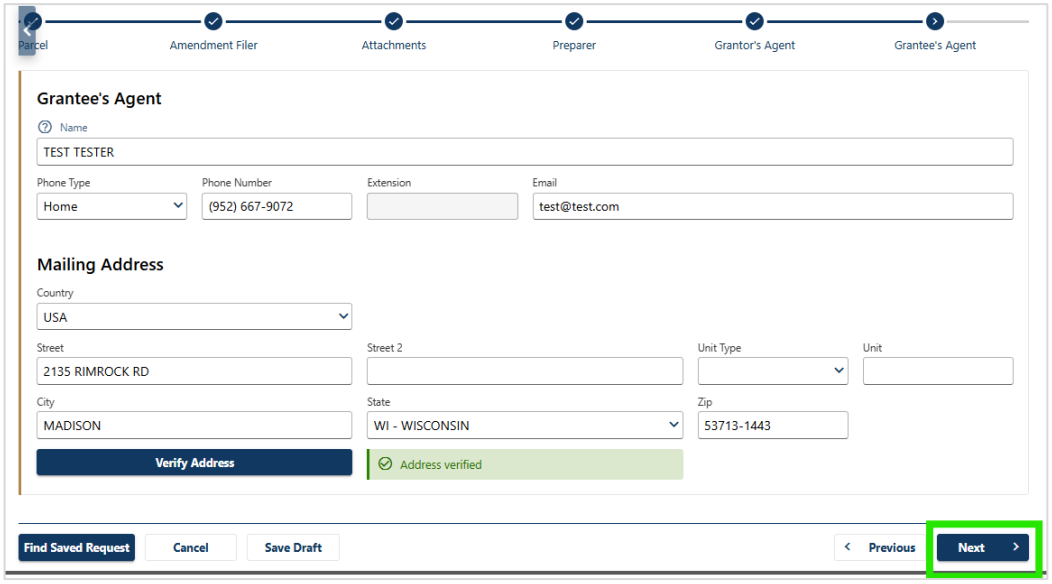
15. Grantee's Agent – update the grantee's agent information if needed, then click "Next"



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16. Other sections – if other sections appear for you such as legal description, financing and marketing simply update any information and select "Next"

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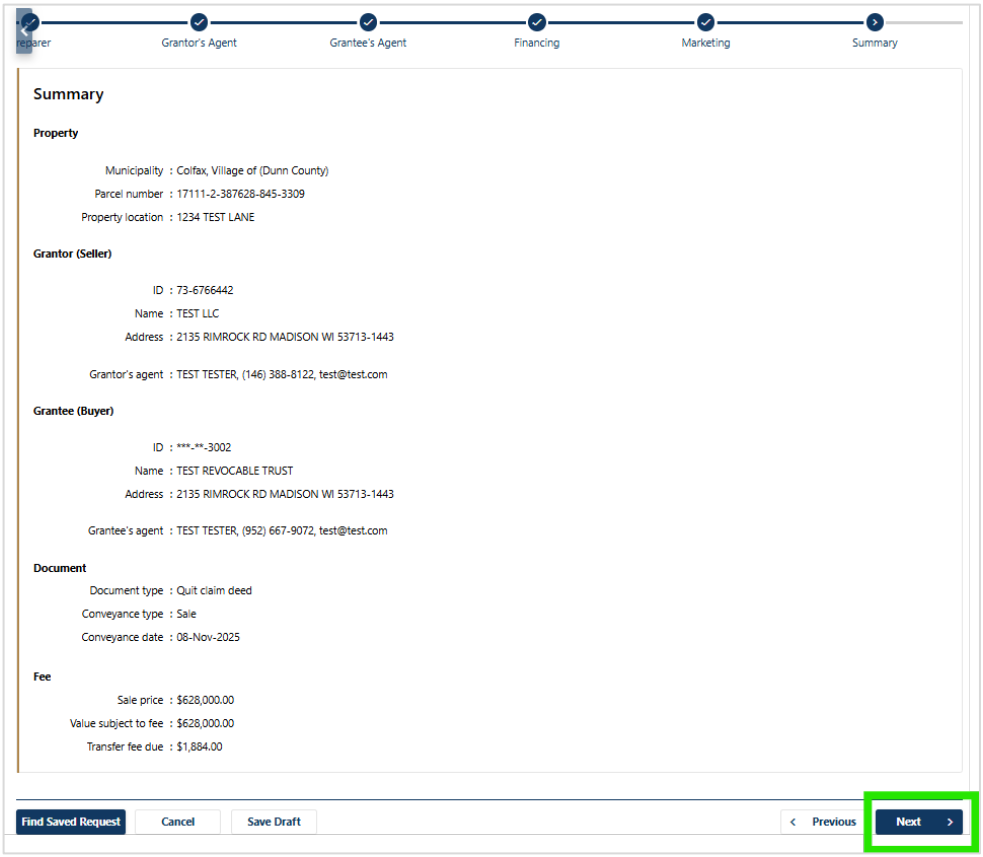
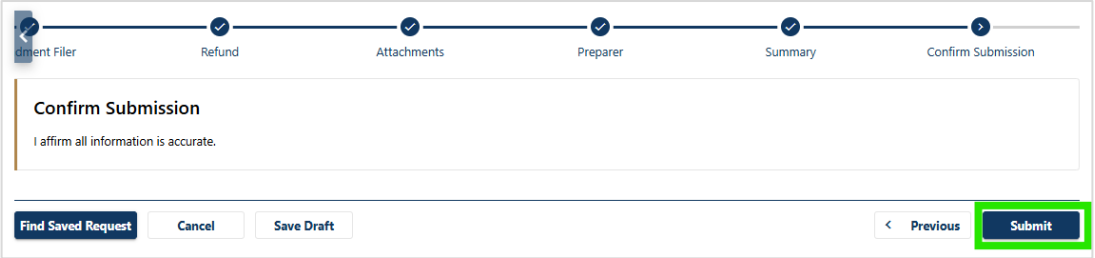
17. Summary

- Data entry sections are summarized for you to review
- Summary does not contain all the transfer return information; it only contains the information that is deemed critical. Click "Next" to continue.

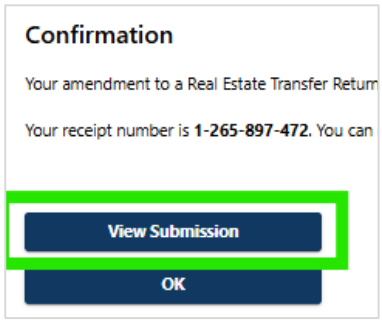


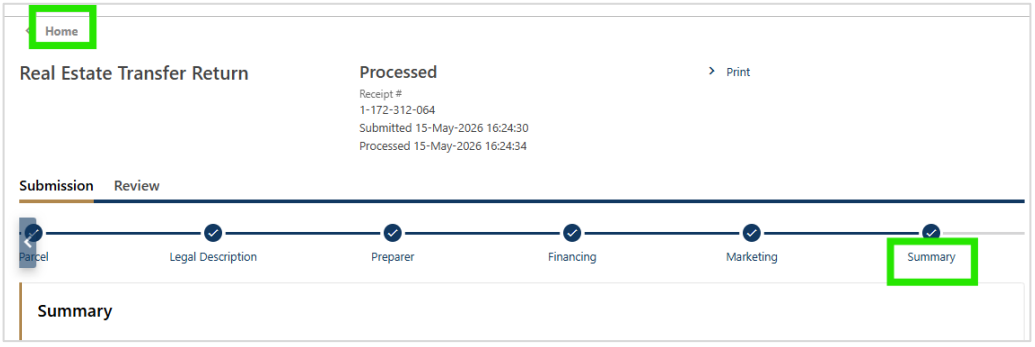
18. Confirm Submission – in this section, the preparer affirms all information entered is accurate and true by clicking "Submit"

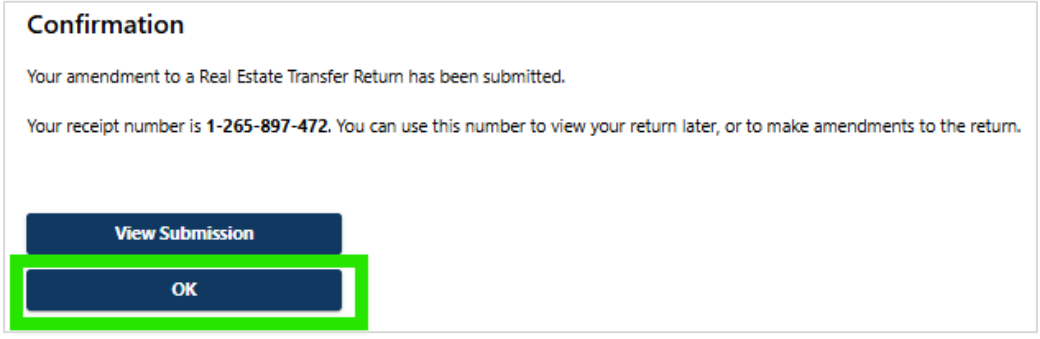


19. Confirmation

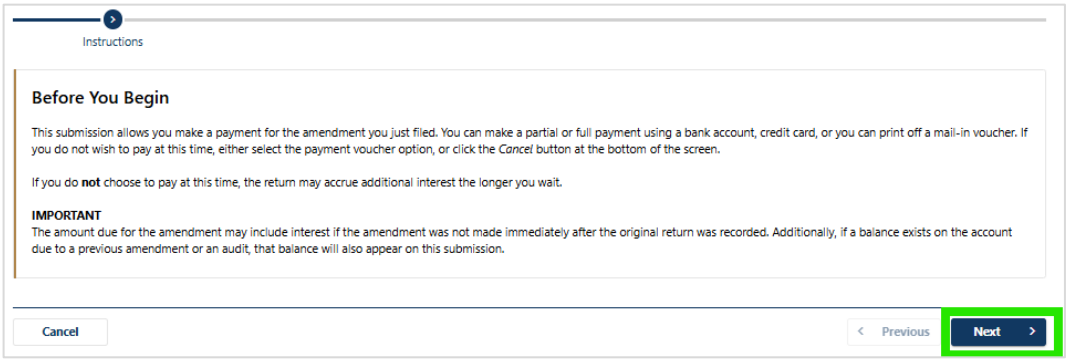
- Confirmation page states the amendment request has been submitted
- If you do not receive a response from DOR within 30 days, contact our office by phone or email
- Receipt number remains the same as the original receipt number
- System displays two buttons to choose from:
  - **View Submission**
    - » Allows you to view each section of the return; however, no changes can be made
    - » Return is displayed through each tab beginning with the County and ending with the Summary
    - » Once you have reached the Summary tab, select "Home" in the upper left-hand corner. The system directs you back to the MTA home page.
  - **OK –** directs you to immediately pay the additional fee due; the system displays information on how to make the additional payment







20. Instructions to make a payment – read the instructions, then select the Next button



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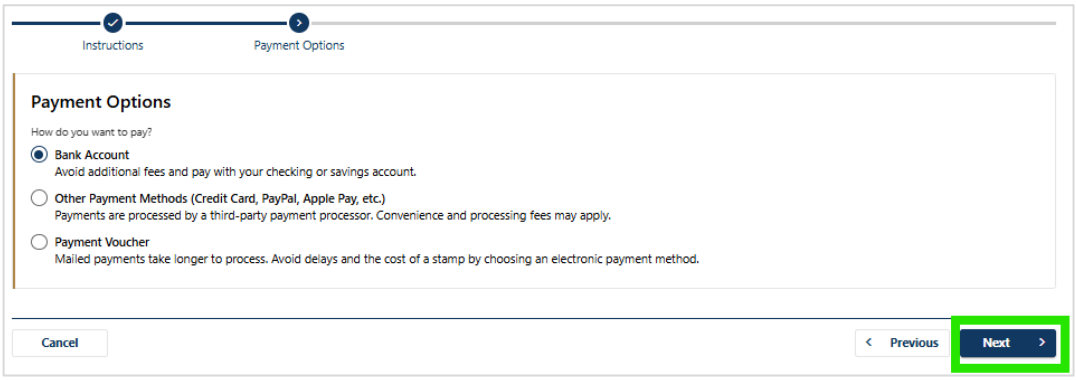
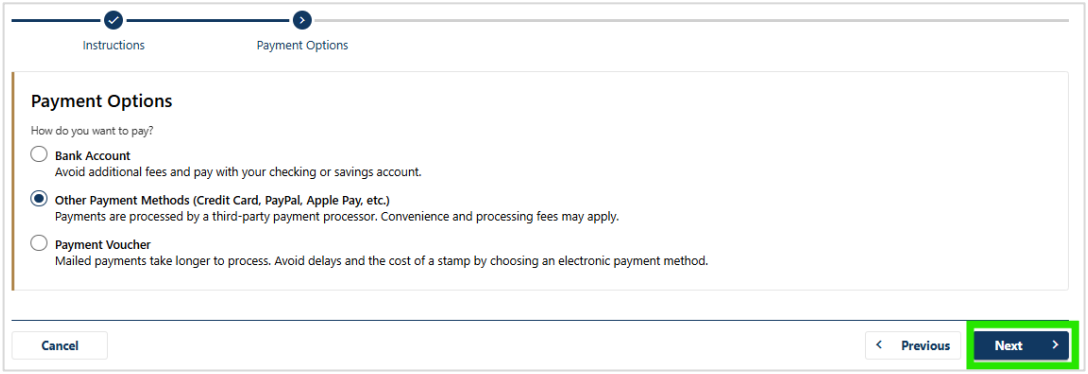
21. Payment Options

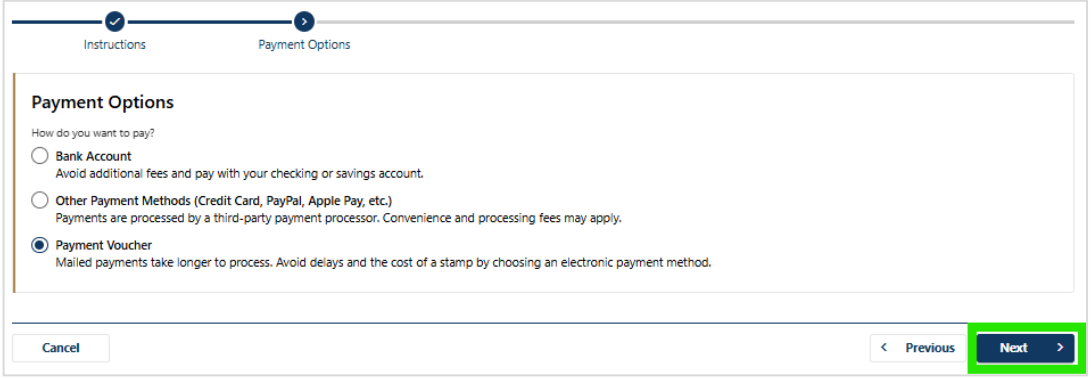
- Displays payment options for making the additional transfer fee payment
- System automatically calculates the difference between what was originally paid and what should have been paid
- **Bank Account –** select a payment option and click "Next"



- **Other Payment Methods (ex: credit card, PayPal) –** select a payment option, then click "Next"

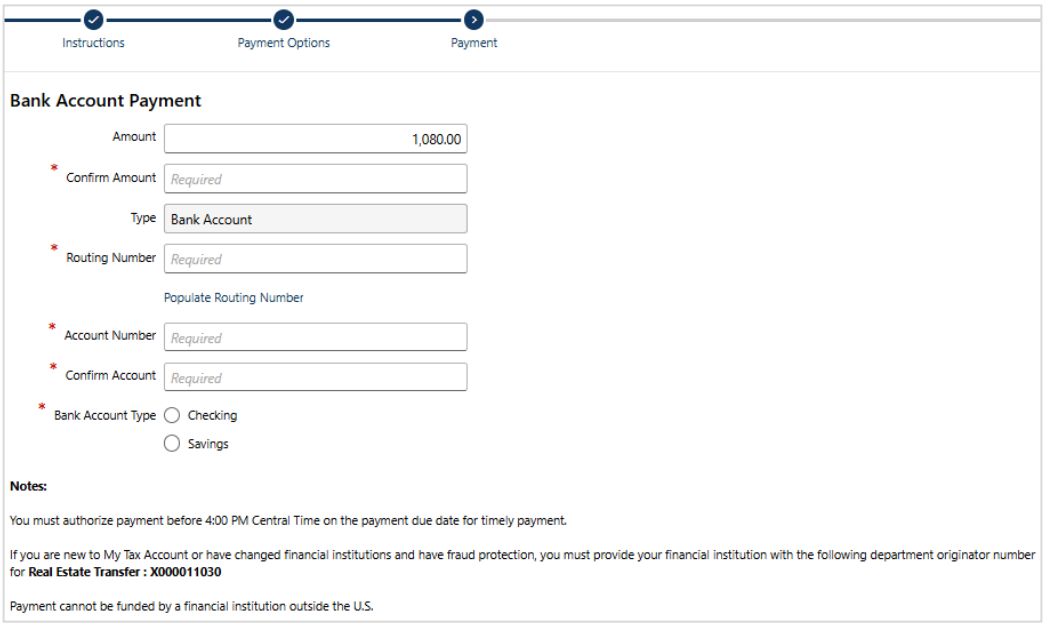


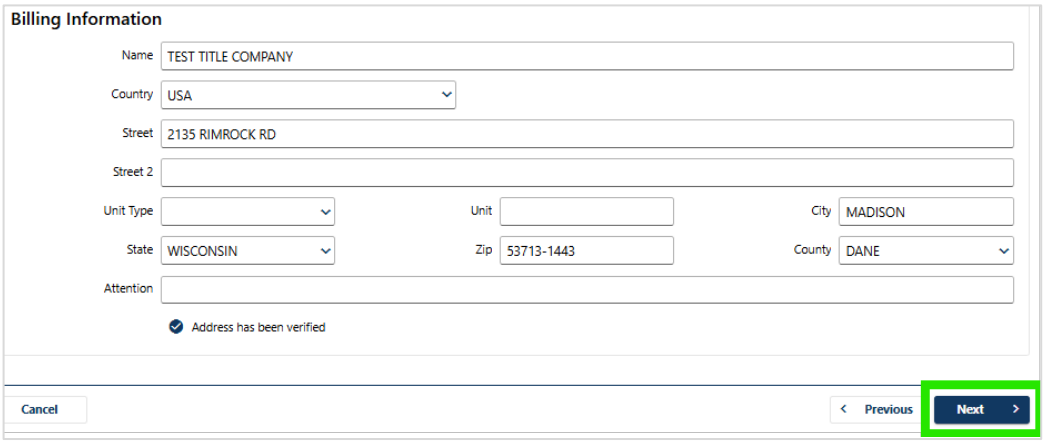
- **Payment Voucher**



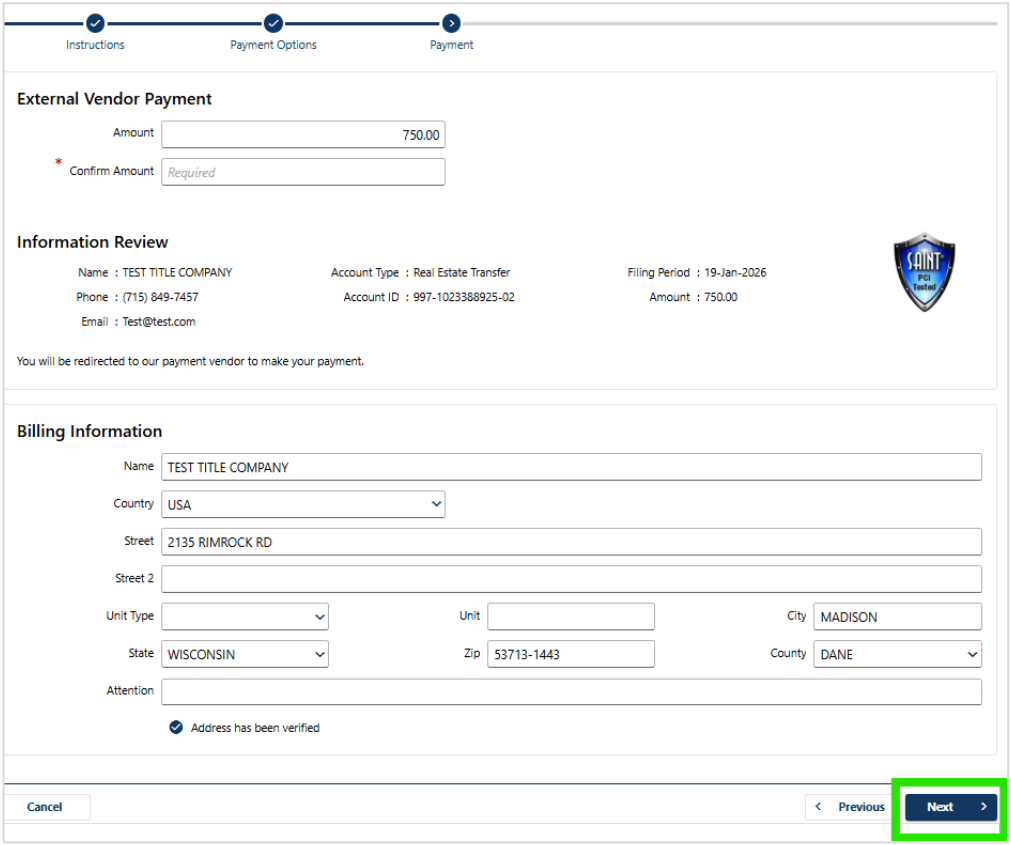
22. Payment

- **Bank Account (example)**
  - System calculates the additional transfer fee due and displays it in the Amount field
  - In this example, the system calculated Amended Transfer Fee due $1,884 minus Original Transfer Fee Paid $804 equals $1,080 additional fee due
  - Complete the required fields and billing information and click "Next"

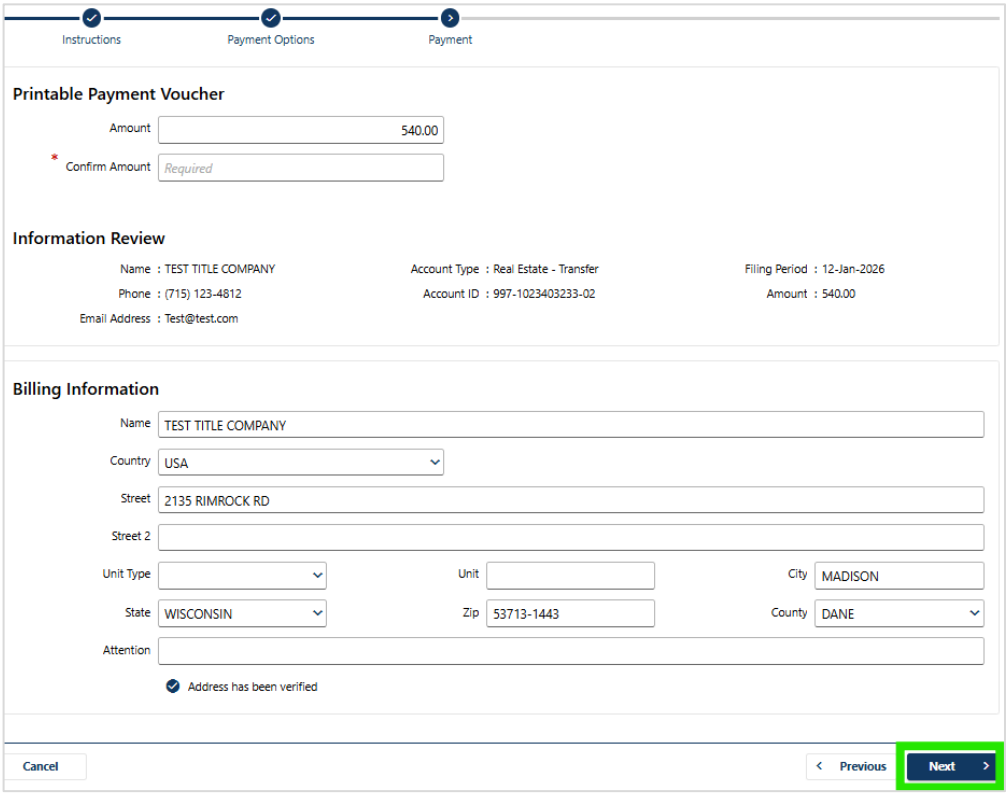




- **Other Payment Method (Credit card, PayPal, etc.) (example)**
  - System calculates the additional transfer fee due and displays it in the Amount field
  - In this example, the system calculated Amended Transfer Fee due $750 minus Original Transfer Fee (used an exemption) paid $0 equals $750 additional transfer fee due.
  - Complete the required fields and billing information and click "Next"

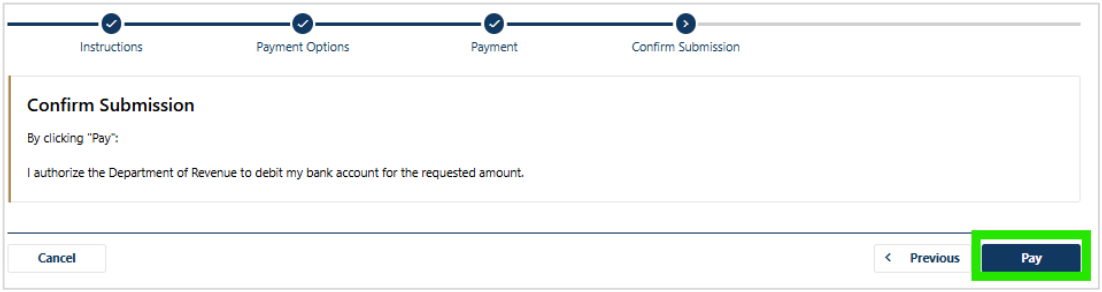


- **Payment Voucher (example) –** complete the required fields and billing information, click "Next"

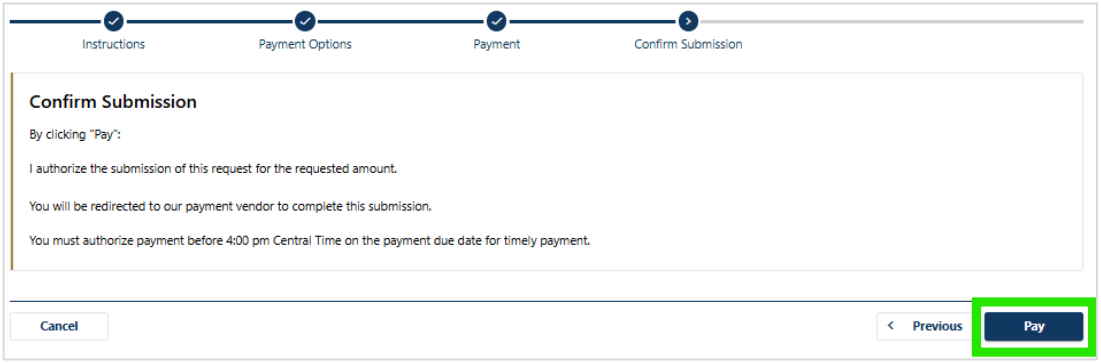


23. Confirm Submission – authorize the Department of Revenue to accept your additional fee due payment. (ex: bank account, credit card, PayPal, etc.) and select "Pay"

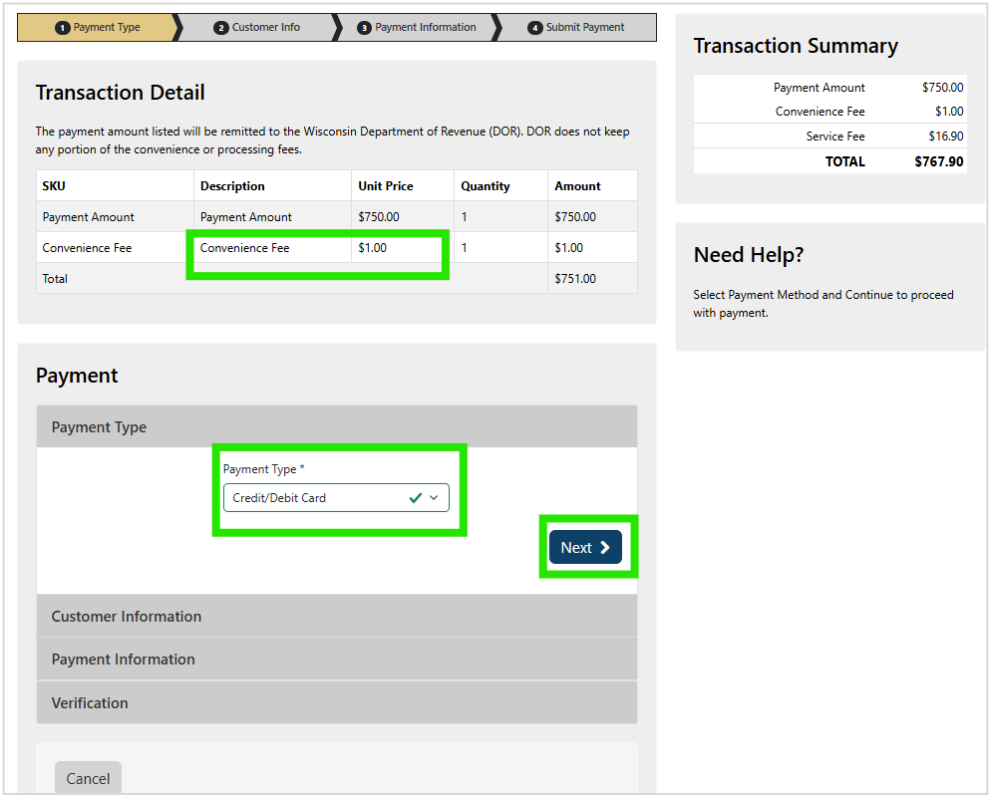
- **Bank Account Payment – Confirm Submission page**



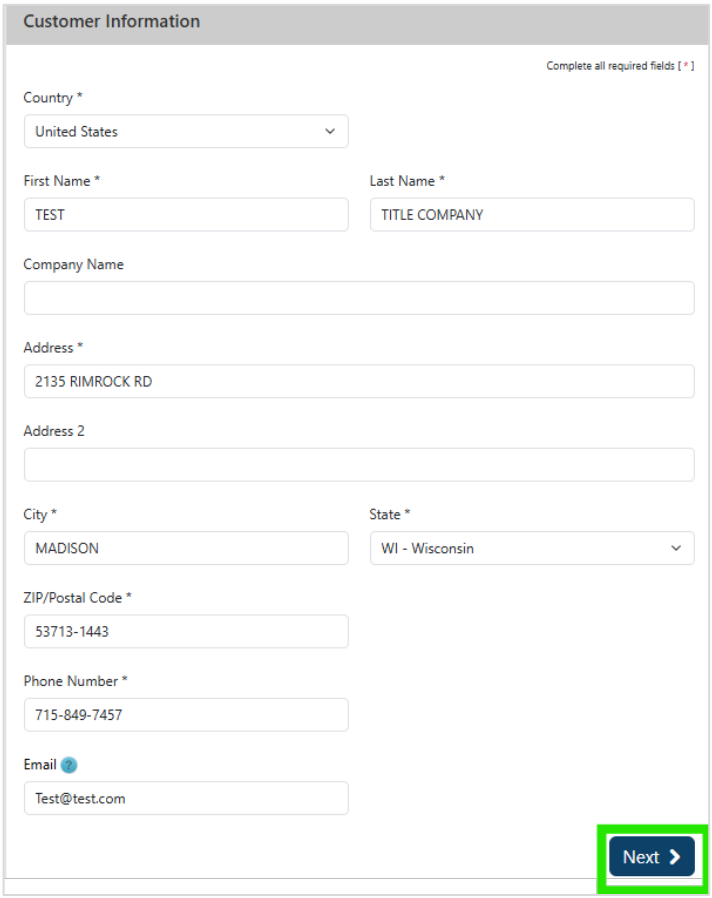
- **Other Method Payment – Confirm Submission page –** when you select "Pay" the system redirects you to our payment vendor to complete the submission



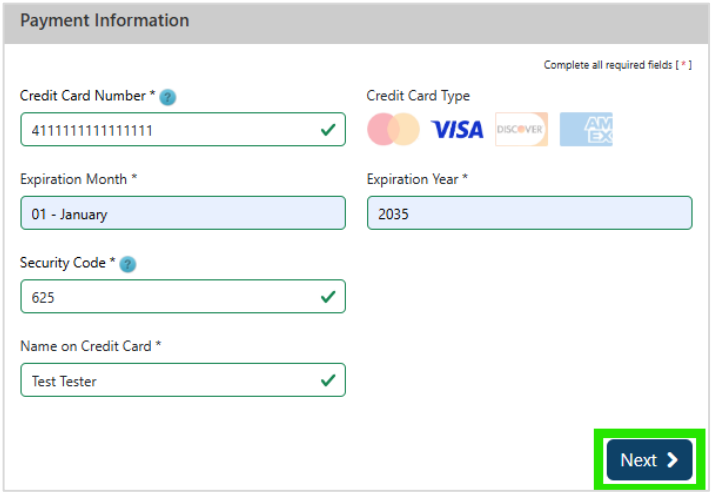
- **Payment Type**
  - Select your payment type, then select "Next".
  - Note: There is a convenience fee of $1 and also a service fee charge for using a credit card, etc.



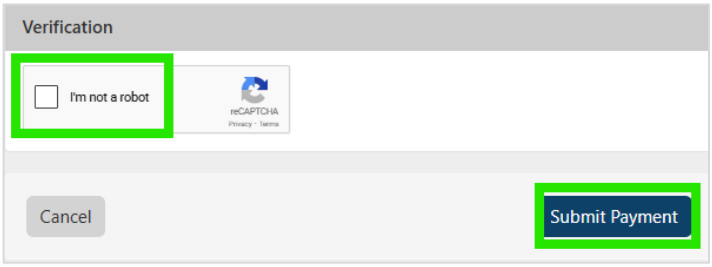
- **Customer Information** – complete required fields in the customer information section, select "Next"



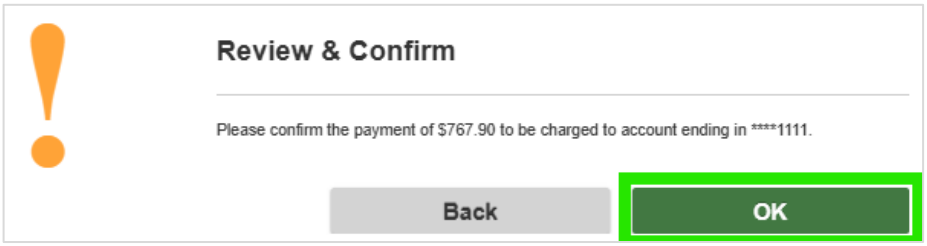
- **Payment Information** – complete the required field and click "Next"



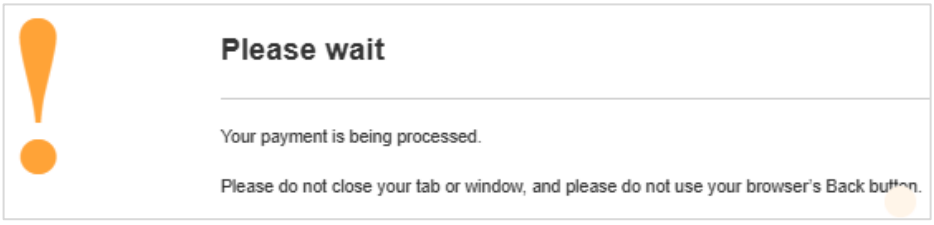
- **Verification** – select I'm not a robot and select the Submit Payment button



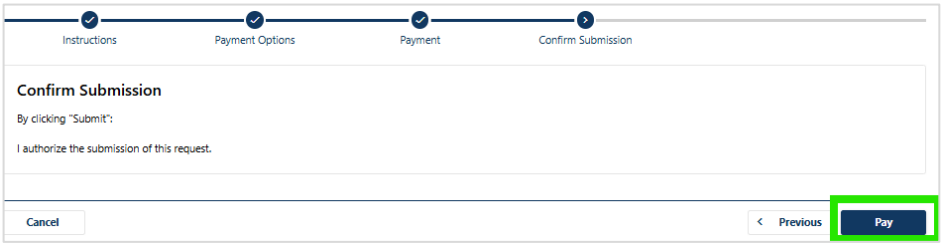
- After you select "Submit Payment" a "Review & Confirm" window appear, click "OK"



- Once you confirm and click ok, the system displays the payment being processed
- When the processing is complete, you receive a confirmation page



- **Voucher payment – Confirm Submission page –** select "Pay"



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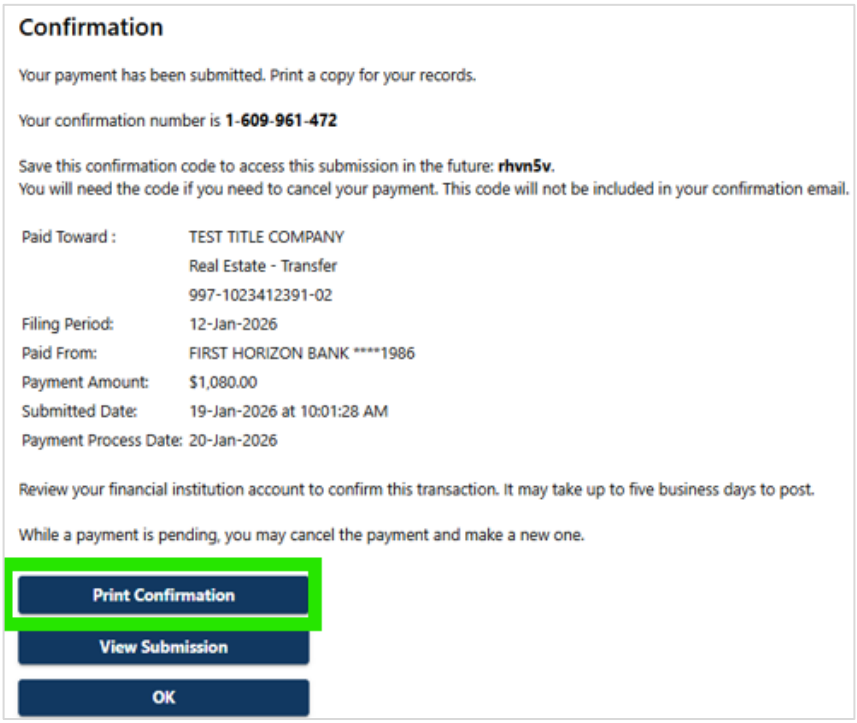
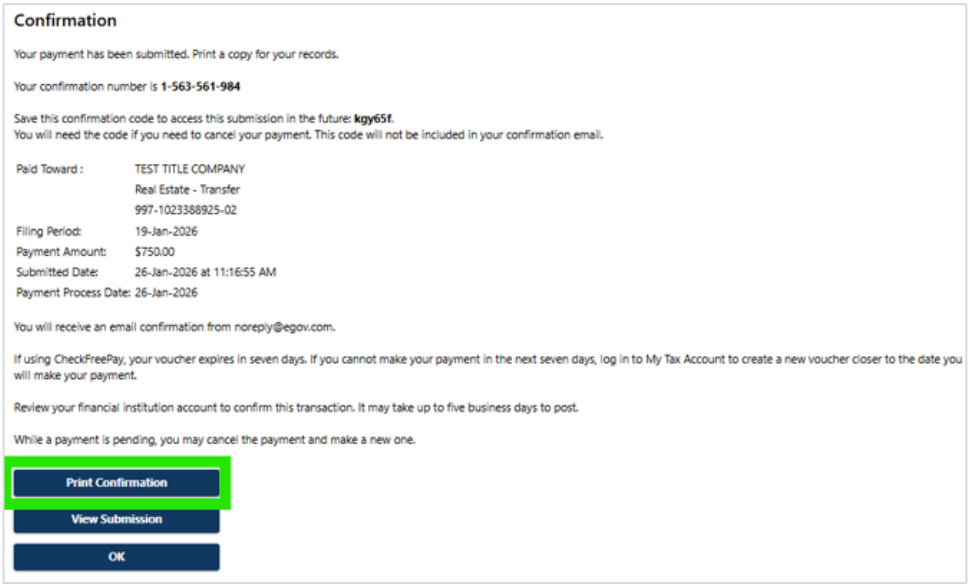
24. Confirmation

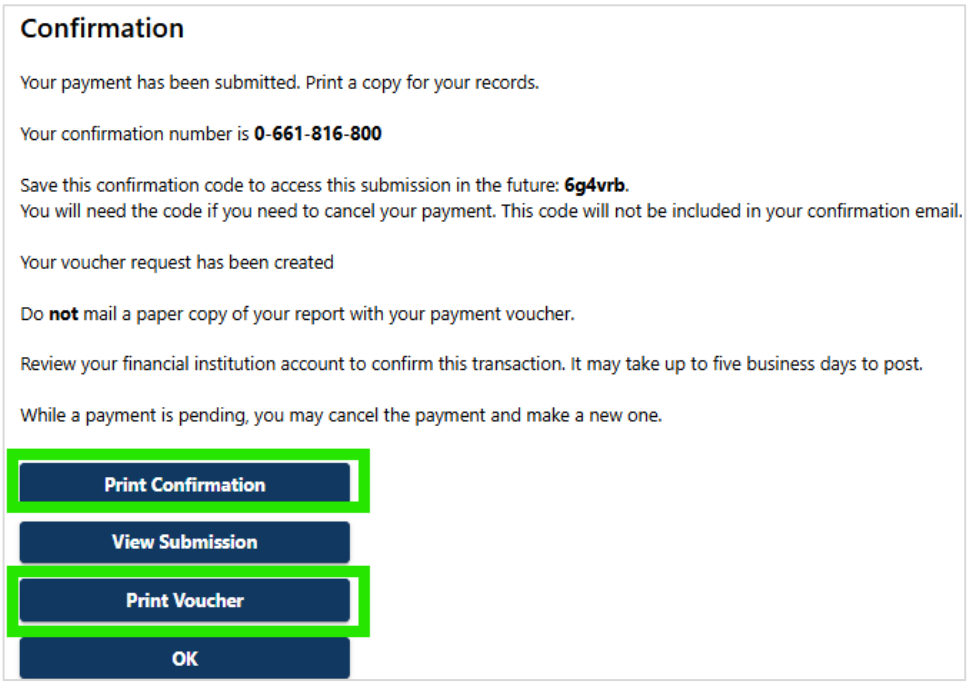
- **Bank Account**



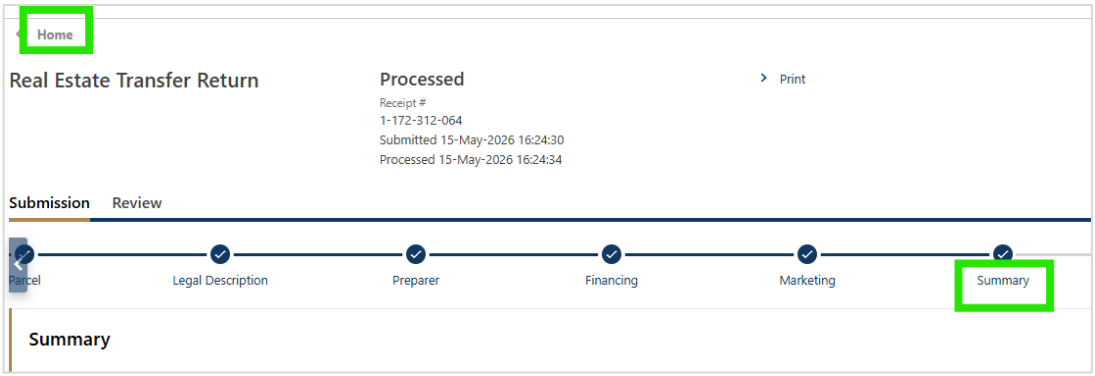
- **Other Payment Method**



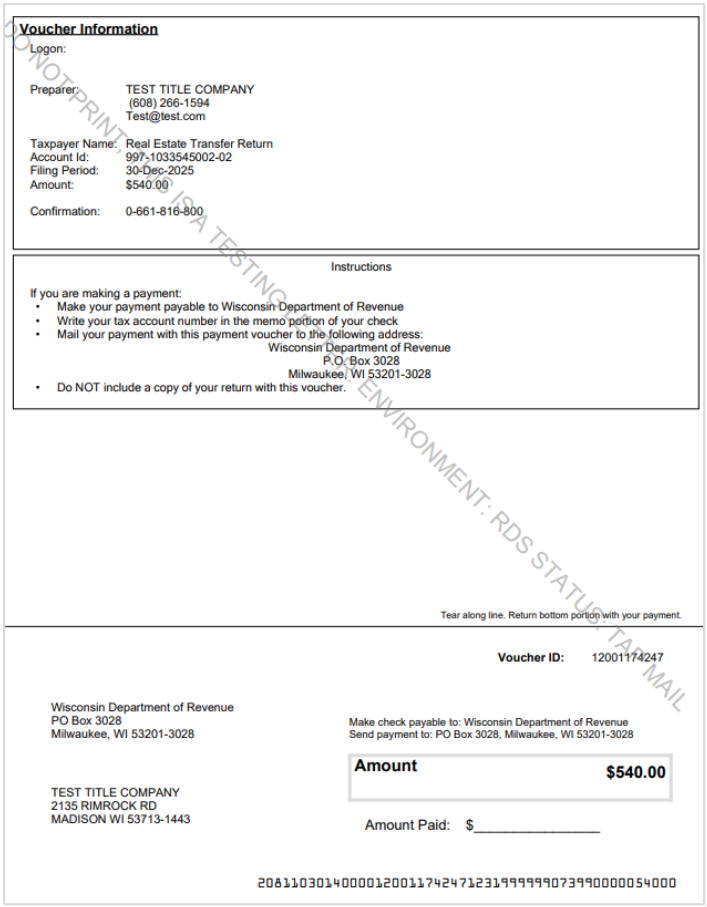
- **Voucher Payment Method**



- **Confirmation Buttons Functionality**
  - **Print Confirmation**
    - » **P**rint the confirmation page that displays on a new tab
    - » Printing the confirmation page serves as a receipt of payment, unless you select to make a payment with a voucher
  - **View Submission**
    - » Allows you to view each section of the return; however, no changes can be made
    - » Return is displayed through each tab beginning with County and ending with the Summary
    - » Once you reached the Summary tab, select "Home" in the upper left-hand corner. The system returns you back to the MTA home page.



- **Print Voucher**
  - » Opens a new tab so you can print the voucher – tear along the line, mail the bottom half of voucher with your additional transfer fee payment, and keep the upper half for your records
  - » Follow the directions on the voucher – shows who to make check payable to and address to mail both the voucher bottom half and payment



- **OK button –** returns you to the MTA home page

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25. Resources/Contact Information

Web pages

- **RETR –** revenue.wi.gov/Pages/retr/Home.aspx
- **MTA –** tap.revenue.wi.gov/mta/_/

Questions? – contact us:

- Email: RETR@wisconsin.gov
- Phone: 608-264-6885 or 608-266-1594