Wisconsin
Department of Revenue

State Debt Collection Initiative
My Tax Account – SDC

http://www.revenue.wi.gov/html/debtcoll.html

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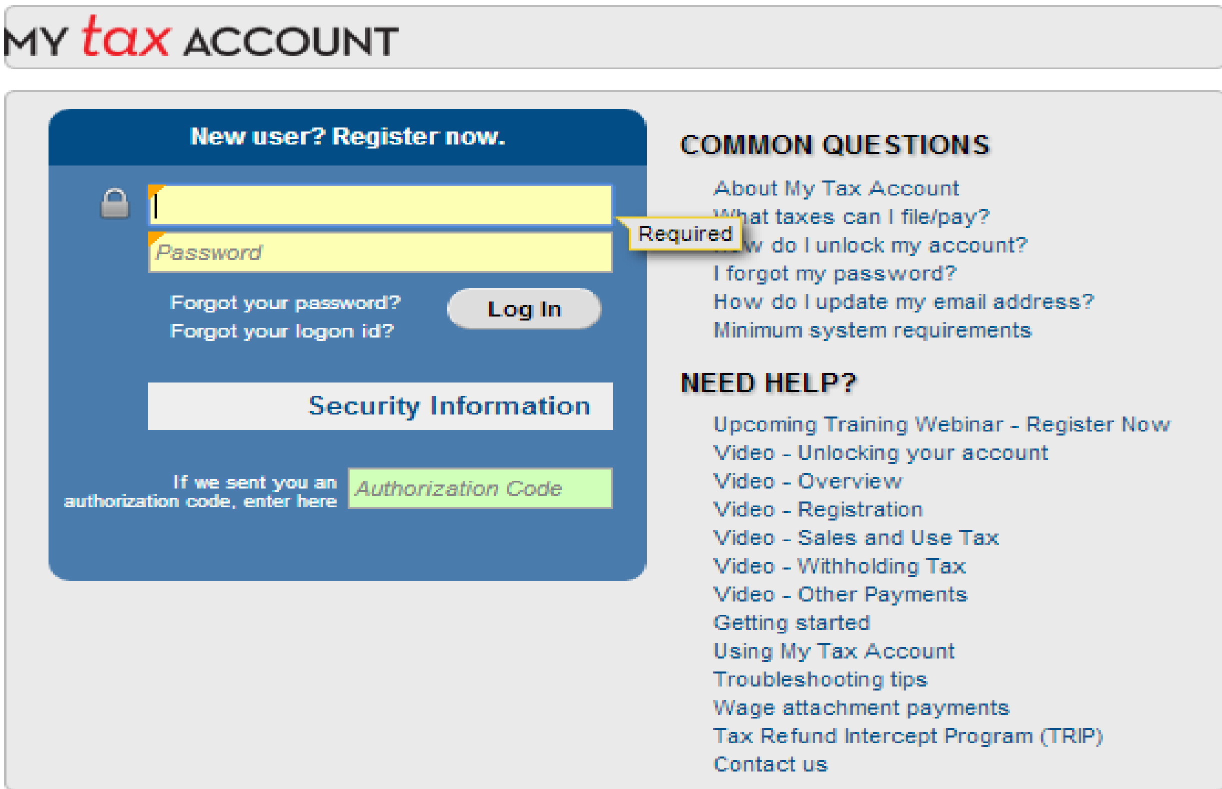
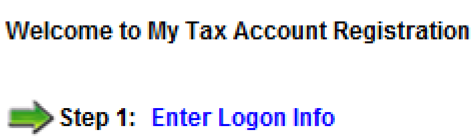
New User Registration Process

- Open the Revenue Home page and click on the *My Tax Account* button.
  https://tap.revenue.wi.gov



- Click on the New User? Register Now link to set up your account profile.

Step 1: Logon Info



- Click the '**Enter Logon Info'** link to open the Logon Information page.

Enter Logon Information

1. Logon Id
2. Password
3. Confirm Your Password
4. Email Address
5. Confirm Your Email Address
6. First and Last Name
7. Country USA Type Phone #
8. Select a Secret Question
9. Secret Question Answer
10. Confirm Secret Question Answer
11. Are You a 3rd Party Preparer?

Logon Id

Required

Your Login Id must be between 5-20 characters.

Your Password must be between 7-20 characters and MUST contain a combination of letters and numbers. Passwords are case sensitive and cannot contain your User Id.

OK Cancel

Step 2: Authentication

Welcome to My Tax Account Registration

Step 1: Enter Logon Info

Logon Id:

Email:

3rd Party Preparer:

Step 2: Authenticate Customer Information

My Tax Account has two levels of access: Master and Account Manager. The first user to complete an access request for a business automatically receives 'Master' access. All other users who request access for the business will receive 'Account Manager' access. The 'Master' can manage access for all 'Account Managers'.

Customer Access Request

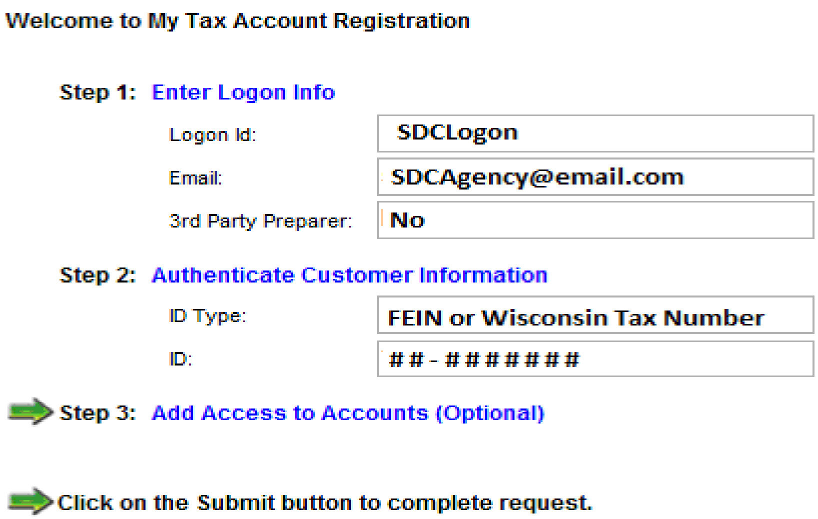
Complete the fields below to request access

1. Select ID Type
2. Enter ID Number
3. Enter Customer Last or Business Name
4. Enter Customer Zip Code

- Enter the ID type and Number. ID Type options include:
  - Federal Employer Identification Number (FEIN)
  - Wisconsin Taxpayer Number (WTN)

- Enter the Business Name as the full legal name to authenticate. State Agency names start with either Wisconsin Department or WI Department.

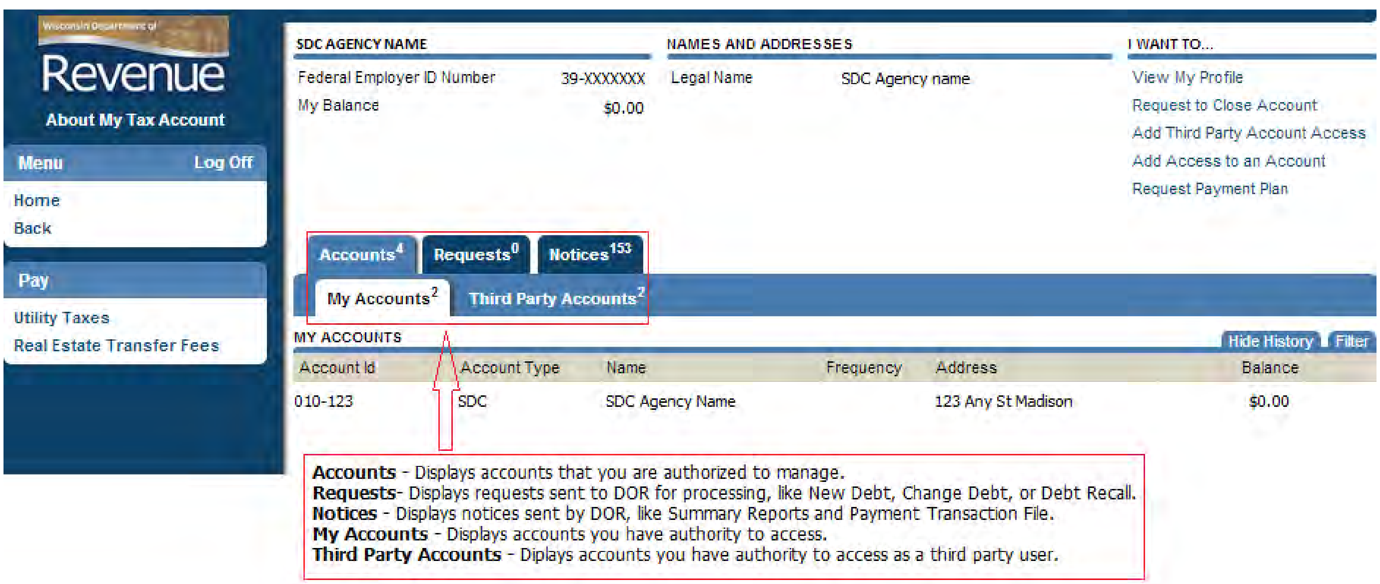
- Skip Step 3 and press the submit button. This screen is used only for adding access to business tax accounts.



- Once you have completed these steps, contact Agency Collection Programs to add SDC account to your profile, email trip@revenue.wi.gov or call 608-264-0344.

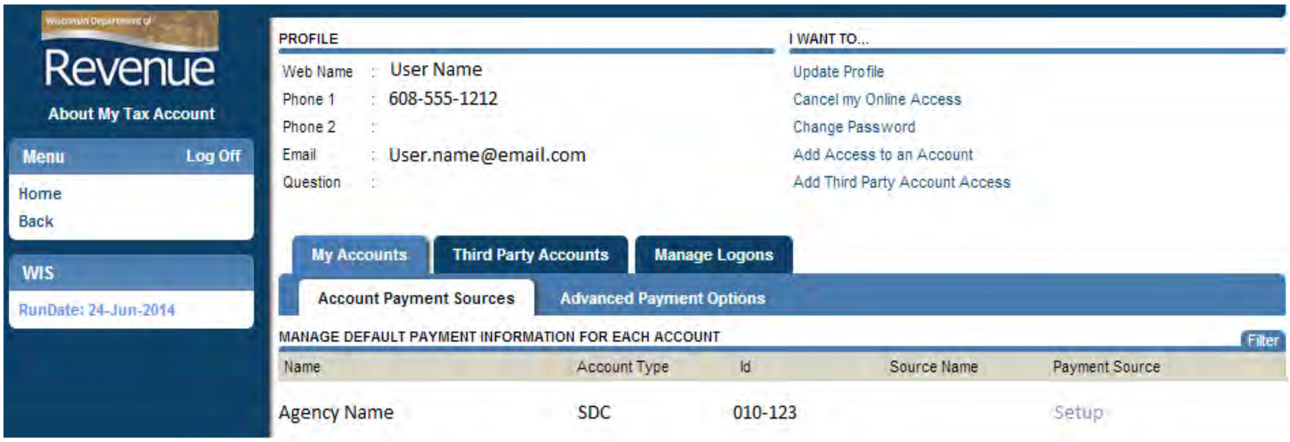
Introduction to *My Tax Account* – SDC

Home Page

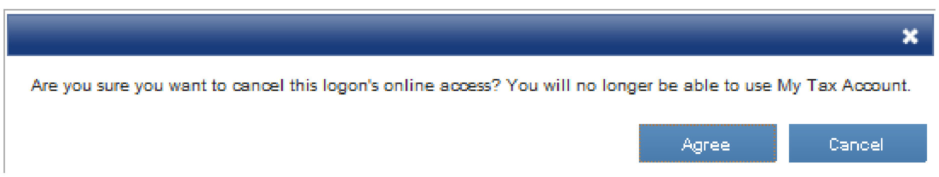


View My Profile

Either you or your account administrator will be able to control your access to accounts or updates to your status in *My Tax Account* in the 'View My Profile' section.



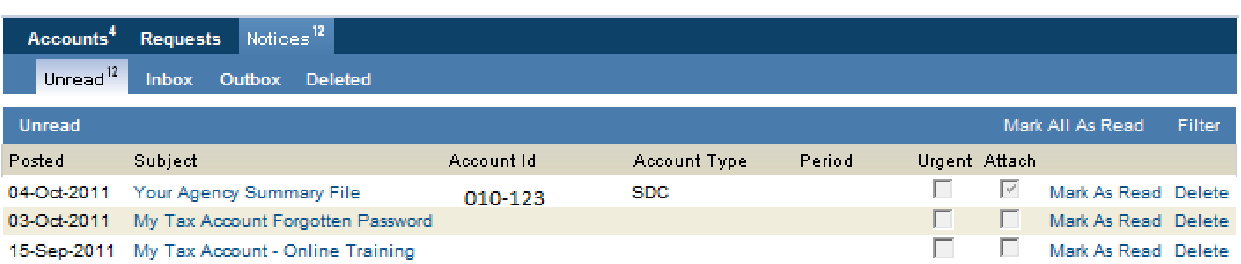
- **Update Profile -** Make changes to your Web Name, Phone, Email or security question.
- **Cancel My Online Access -** Removes your authority to access *My Tax Account*.



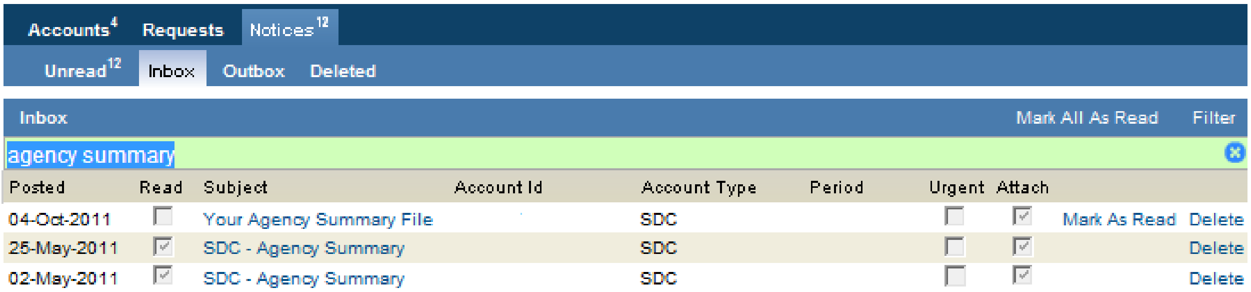
- **Change Password -** Update password. DOR security recommends that you update your password every 60 days.
- **Add Access to an Account -** Not used for the SDC program. If you need to add access to an account, email trip@revenue.wi.gov or call 608-264-0344.
- **Add Third Party Account Access -** Not used for the SDC program.
- **Payment Sources -** Not used in the SDC program.

View Notices

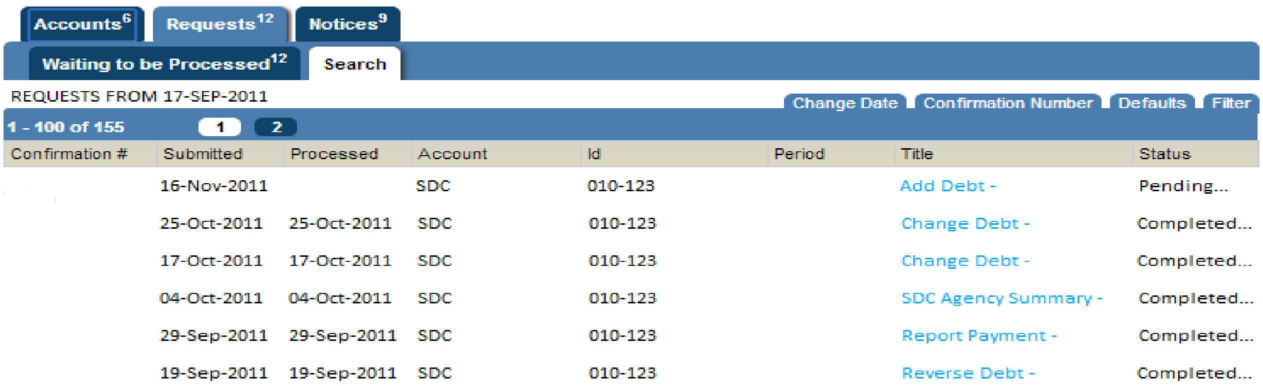
Notices are located in a tab from your home page. SDC Reports and DOR communications are issued through Notices on a monthly basis. Agency Summary, Transaction and Return files are available on the first business day of the month.



- **Filter** - You may filter for a specific notice or notice type by pressing the filter tab. A green box will open and you can type in a key word to filter for a specific notice.



View Requests

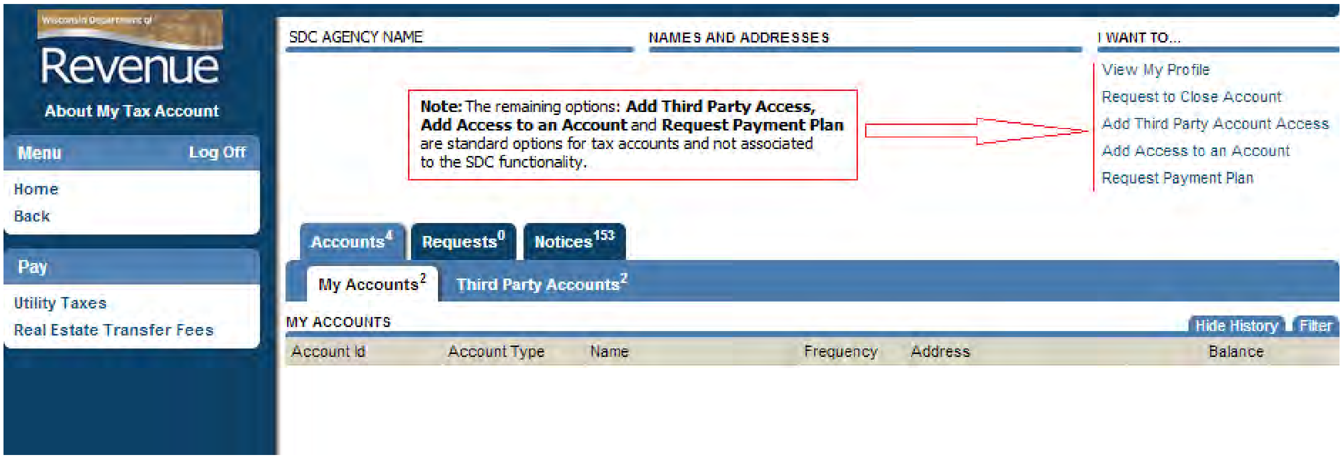


- Requests are actions you are sending to DOR for processing. Pending requests do not have an **Action Taken** date until processed. Processed requests have an action date. Processed or completed requests cannot be withdrawn or changed.

- To view all pending requests, open the **'Waiting to be Processed'** tab. If a request is pending, you may withdraw the request. Click on the action Title (Add Debt, Change Debt, etc.) to open the form. Click the 'Withdraw' button located in the side panel and confirm the action.

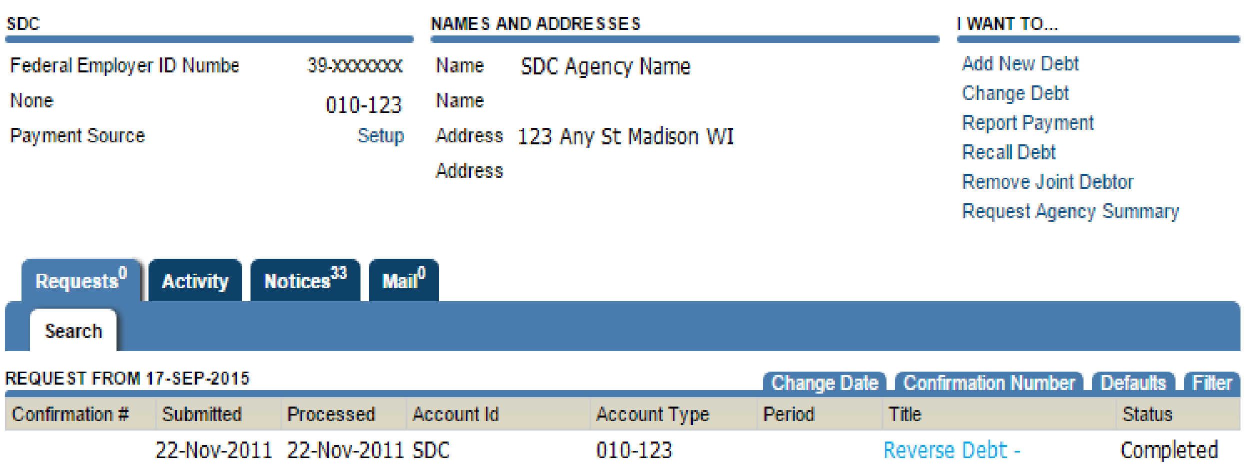
Features:

- **Change Date** - Open this tab to display a different date range.
- **Confirmation Number** - Open this tab to search for a request by the confirmation number.
- **Filter** - You may filter for a specific request by pressing the filter tab. A green box will open and you can type in a key word to filter for a specific request.



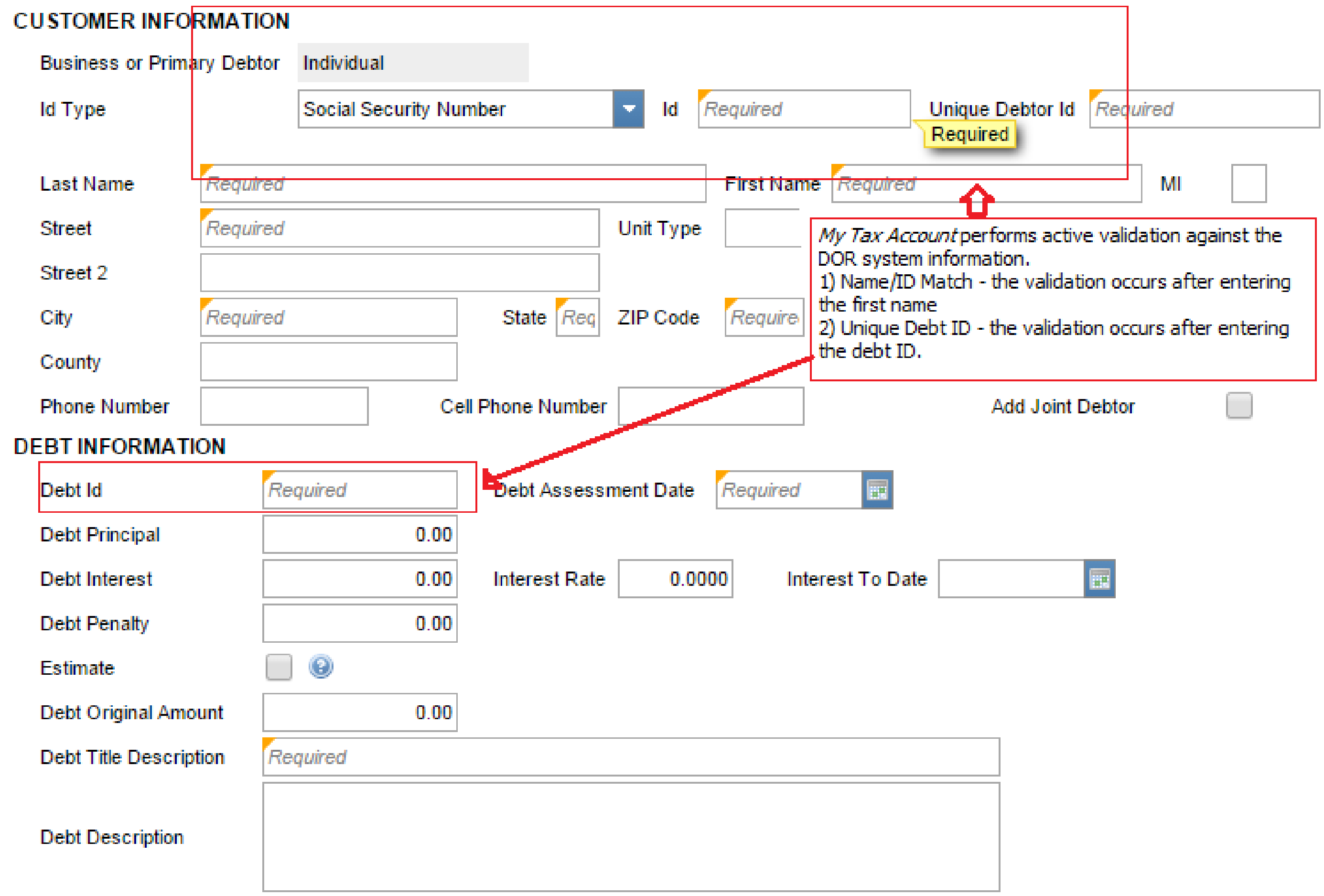
Manage Your SDC Account

- Click on your SDC Account Number to activate the SDC menu options. The Account Summary tab will display your agency information.

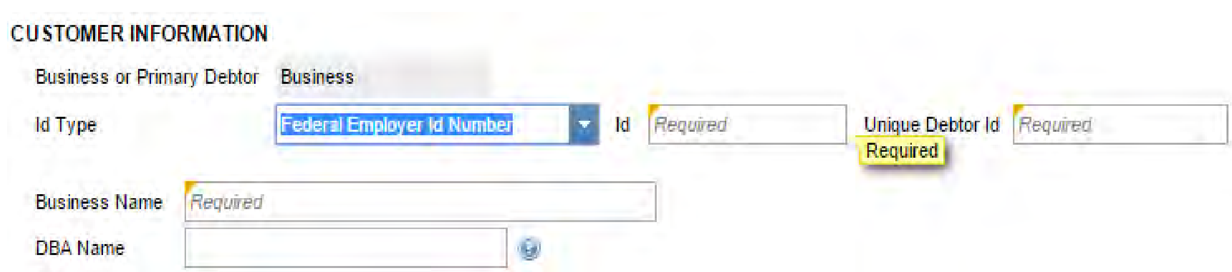


- Pending Requests and Notices specific to the SDC Account from this screen. The Mail tab is not used for SDC purposes at this time.
  - **Change Date:** You can search for different date ranges.
  - **Confirmation Number:** You can search by entering the confirmation number.
  - **Defaults:** Not an option for *My Tax Account.*
  - **Filter:** You can filter to display specific information like name, status or title.

Add New Debt



- The default is set to Individual and is tied to the Id Type. If SSN or DLN is selected as the Id Type, the Business or Individual field will fill in Individual. If FEIN is selected as Id Type, the Business or Individual Field will fill in as Business.



Customer Information

Business or Primary Debtor (Individual) – DOR performs a match on the name and the identifier you send to DOR. It is important to know that an individual can be operating a business. Use these clues to help you determine how you should refer these types of debts.

- **Individual** – A person or a person operating a business as a sole proprietor or a single member Limited Liability Corporation (LLC). Select Social Security Number (SSN) or Driver's License Number (DLN) as your Id Type.
    - Id Type must be SSN or DLN.
    - Last Name and First Name fields are required.
    - DBA Name is for business or trade name of business the individual is operating.

- **Business** – A business entity operating as a corporation or LLC entity. Business name is required to contain LLC, INC, LLC, etc. Select FEIN as your Id Type.
    - Id Type must be FEIN.
    - Business/Last Name field must be completed with Legal Name.
    - Business DBA Name may be used for trade name.

Note: If the name does not include these indicators then the business may be operating as a sole proprietor and should be referred as an individual with the trade name entered in the DBA Name field.

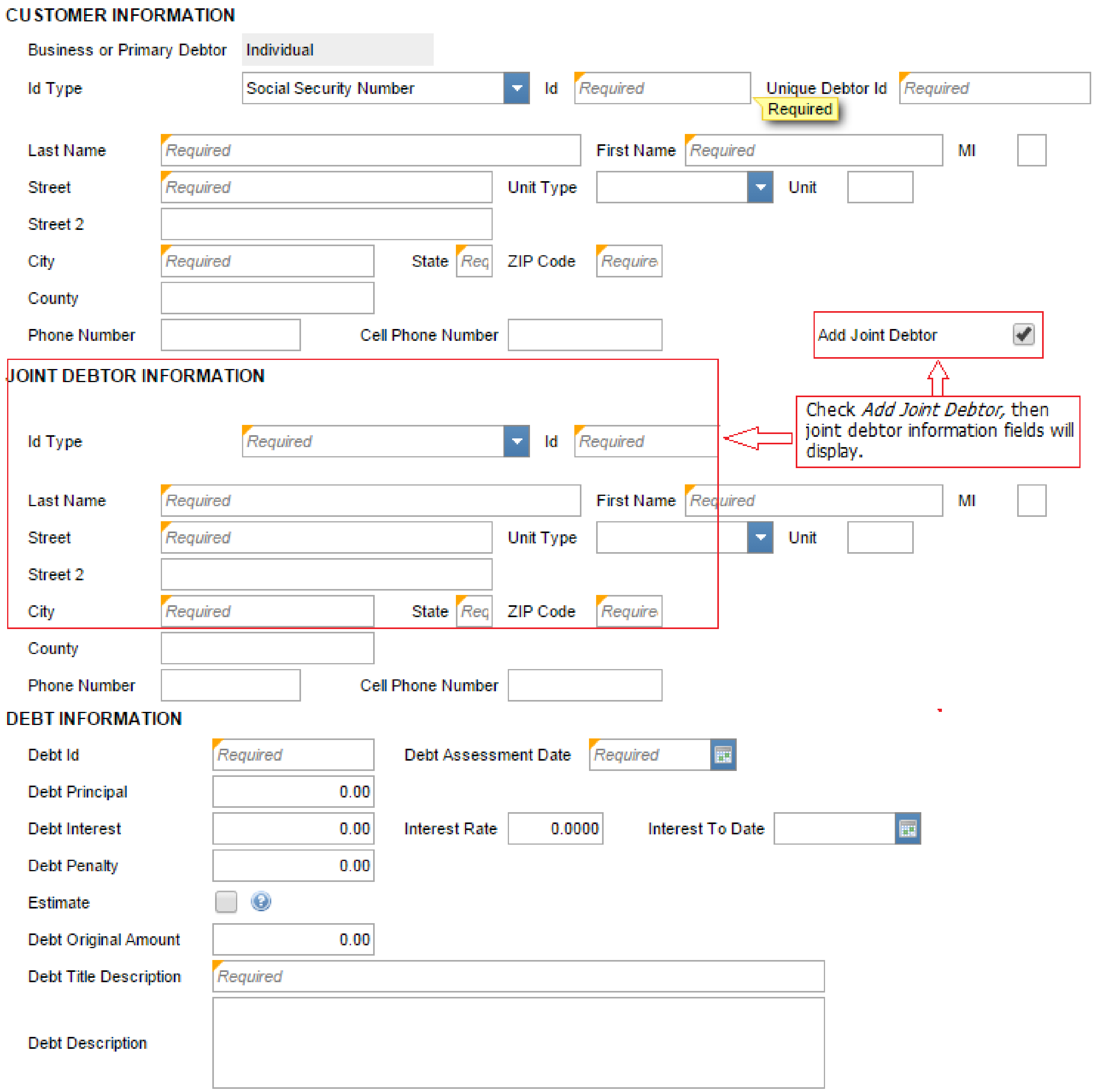
- **Examples:**
  Joe Debtor – Individual (SSN)
  Joe Debtor doing business as Joe's Bar and Grill – Individual (SSN)
  Debtor Enterprises, Inc. doing business as Joe's Bar and Grill – Business (FEIN)
  Joe's Bar and Grill LLC – Business (FEIN)

- **Agency ID (AIN)** – A unique ID assigned to debtor by your agency that is not the SSN.
- **Address & Contact Information** – Street, City, State, and Zip code fields are required. The remaining fields are optional.

Debt Information

- **Debt ID** – A number assigned to this debt by your agency for identification purposes.
- **Debt Assessment Date** – The date your agency assessed the debt to the individual.
- **Amount Fields:**
    - **Debt Amount Principal** – The amount of unpaid debt. If you assess interest, this is the basis upon which interest is calculated.
    - **Debt Amount Interest** – The amount of interest accrued to referral date.
    - **Debt Amount Penalty** – Any other amount assessed that should not be included in the principal field.
    - **Interest Rate Field –** Enter interest as a decimal. If your rate is 12% enter as .1200.

Add Joint Debt



CUSTOMER INFORMATION

Business or Primary Debtor: Individual

Id Type: Social Security Number | Id: Required | Unique Debtor Id: Required

Required

Last Name: Required | First Name: Required | MI

Street: Required | Unit Type | Unit

Street 2

City: Required | State: Req | ZIP Code: Require

County

Phone Number | Cell Phone Number

Add Joint Debtor ✔

Check *Add Joint Debtor,* then joint debtor information fields will display.

JOINT DEBTOR INFORMATION

Id Type: Required | Id: Required

Last Name: Required | First Name: Required | MI

Street: Required | Unit Type | Unit

Street 2

City: Required | State: Req | ZIP Code: Require

County

Phone Number | Cell Phone Number

DEBT INFORMATION

Debt Id: Required | Debt Assessment Date: Required

Debt Principal: 0.00

Debt Interest: 0.00 | Interest Rate: 0.0000 | Interest To Date

Debt Penalty: 0.00

Estimate

Debt Original Amount: 0.00

Debt Title Description: Required

Debt Description

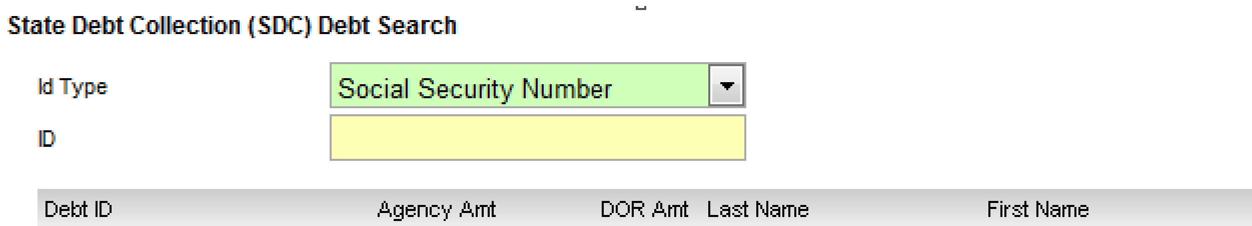
Joint Debtor Information

Individual – A joint debt can be submitted only for individuals. Once primary debtor information is entered you may add a joint debtor (another individual). If you select FEIN as Id type, the option "*Add Joint Debtor*" will not be available. If a business is operating as a sole proprietor, certify the individual who is the owner.

Change a Debt

- Use Change Debt to update a balance if the original amount submitted was in error, or to view the current debt balance.
- Do not use Change Debt to reduce the debt amount for a payment you received. Payments should be reported using the Report Payment option.

- Select the ID Type and enter the ID number. It must be the same ID number you used when you originally submitted the debt. Choices include: Social Security Number or Driver's License Number for individuals and Federal Employer Identification Number for businesses.



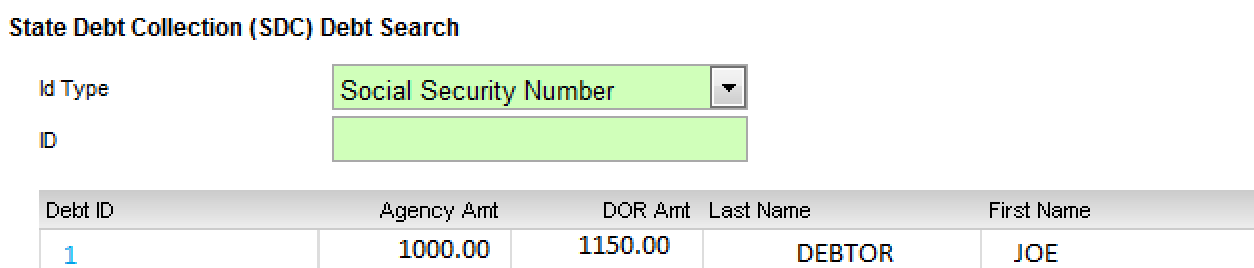
State Debt Collection (SDC) Debt Search

Id Type: Social Security Number

ID

Debt ID	Agency Amt	DOR Amt	Last Name	First Name

- Update a debt by clicking on the Debt ID link.



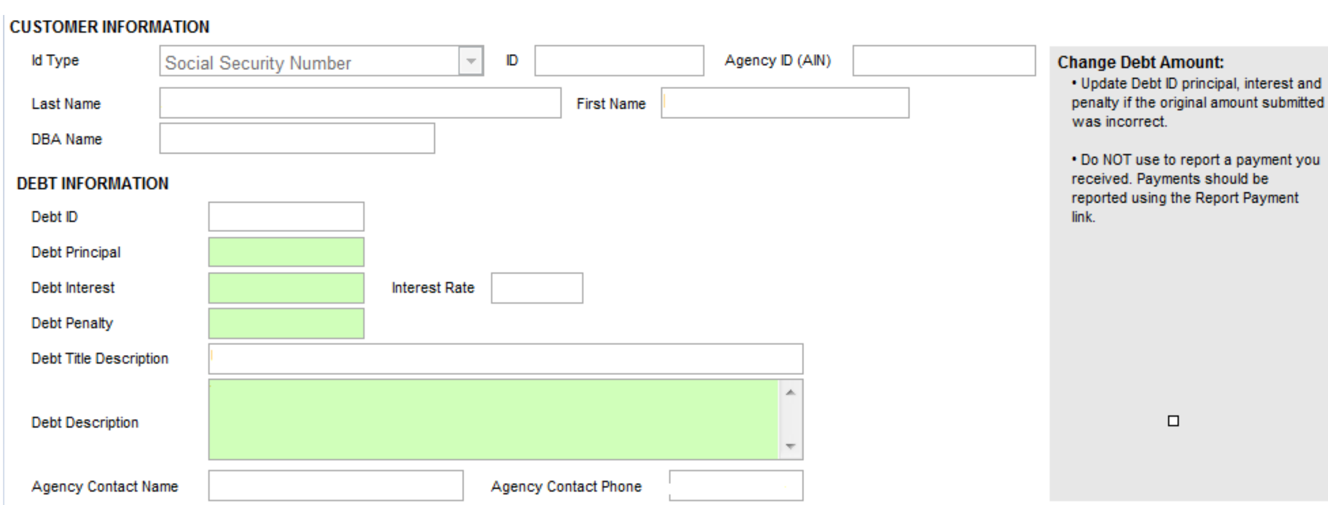
State Debt Collection (SDC) Debt Search

Id Type: Social Security Number

ID

Debt ID	Agency Amt	DOR Amt	Last Name	First Name
1	1000.00	1150.00	DEBTOR	JOE

- A copy of the information originally submitted will be returned. The amount fields and the long description fields are marked in green. These are the allowable update fields.



CUSTOMER INFORMATION

Id Type: Social Security Number | ID | Agency ID (AIN)

Last Name | First Name

DBA Name

DEBT INFORMATION

Debt ID

Debt Principal

Debt Interest | Interest Rate

Debt Penalty

Debt Title Description

Debt Description

Agency Contact Name | Agency Contact Phone

Change Debt Amount:

- Update Debt ID principal, interest and penalty if the original amount submitted was incorrect.
- Do NOT use to report a payment you received. Payments should be reported using the Report Payment link.

- Enter your changes and press the 'Submit' button to proceed.

NOTE: Pending requests are picked up by DOR at 4:00 pm each day. You have until then to withdraw the request.

Report a Payment

- DOR prefers that all payments are made by the debtor directly to the department but we also recognize that some debtors will remit payment directly to the referring agency.
  PARTIAL PAYMENT: If you collect a partial payment, send the amount received to DOR. DOR will apply the payment, adjust the balance due and send a balance statement to the debtor. You will receive your portion of the proceeds in the monthly remittance.

NOTE: If the debtor sends you a check, send the check directly to DOR. We will apply the payment intended for you to the debt and endorse the check appropriately.

- DO NOT use the recall transaction if you received a payment. If the debtor paid your agency, we will apply the payment and continue to collect the fee. Recall should only be used if you sent the debt to DOR in error.
- DO NOT use the debt update transaction to change the amount of the debt if you receive a payment. This will cause an adjustment to the collection fee and any interest calculated to date. Use the debt update transaction only if you sent DOR the wrong amount and need to amend the debt.

PAYMENT IN FULL: If you collect the total amount due, including the DOR collection fee, report the payment through *My Tax Account* or through the New Debt/Debt Update File (tran type 4). Send DOR the full amount or the fee amount.

Send a check for the collection fee to:

Department of Revenue
Mail Stop 4-206
PO Box 8901
Madison, WI 53708-8901

- To begin, select the ID Type and enter the ID number. Must be the same ID you used when submitting the debt. Choices include: Social Security Number or Driver's License Number for individuals and Federal Employer Identification Number for businesses.
-

State Debt Collection (SDC) Debt Search

Id Type: Social Security Number

ID:

Debt ID	Agency Amt	DOR Amt	Last Name	First Name
1	1000.00	1150.00	DEBTOR	JOE

- Click on the Debt ID link.
- Enter the payment amount and click the 'Submit' button.

Payments: 0.00

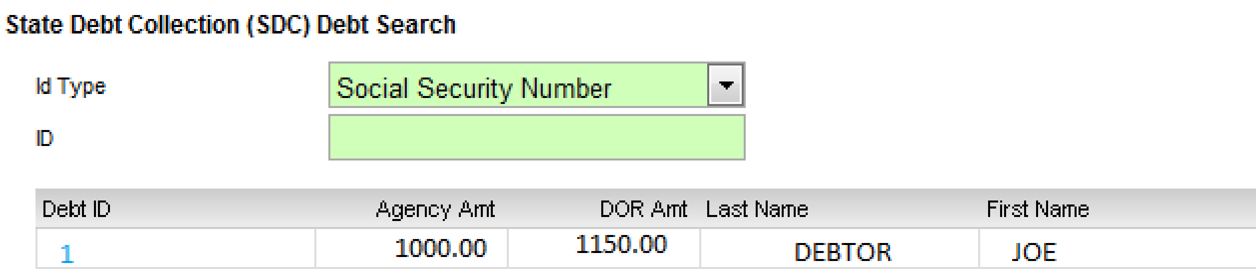
Debtors should make all payments directly to the Department of Revenue.

If you receive a payment, report the amount online and send DOR a check for the payment amount.

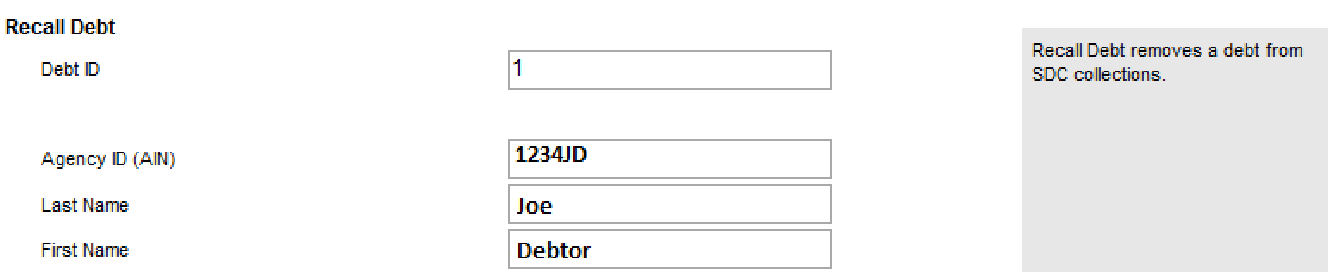
Recall a Debt

- To begin, select the ID Type and enter the ID number. Must be the same ID you used when submitting the debt. Choices include: Social Security Number or Driver's License Number for individuals and Federal Employer Identification Number for businesses.

DO NOT use the recall transaction if you received a payment. Recall should only be used if you sent the debt to DOR in error.

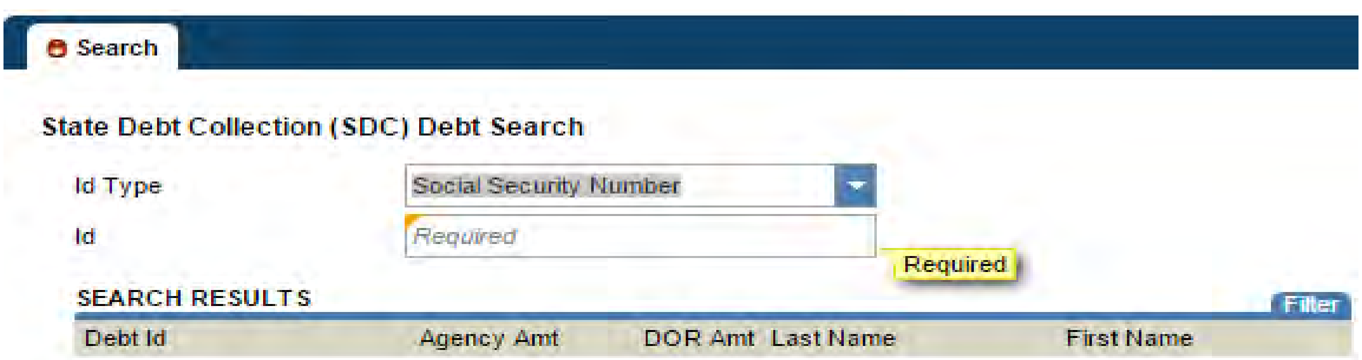


- Select the debt to recall by clicking on the Debt ID link.



- Once you submit this request to DOR, the debt balance will be removed from our system. This action cannot be undone.

Remove Joint Debtor



- To begin, select the ID Type and enter the ID number. Must be the same ID (for primary debtor) you used when submitting the debt. Choices include: Social Security Number or Driver's License Number for individuals.

State Debt Collection (SDC) Debt Search

Id Type: Social Security Number

ID:

Debt ID	Agency Amt	DOR Amt	Last Name	First Name
1	1000.00	1150.00	DEBTOR	JOE

- Select the debt to remove by clicking on the debt ID link.

JOINT DEBTOR INFORMATION

Id Type	Social Security Number	Id	***-**-1234		
Last Name	ANDERSON	First Name	LEON	Middle Int.	

- This request only removes the joint debtor. The primary debtor will remain in collections.

Note: To remove the primary debtor, you need to recall the debt.

Agency Summary

- Request a report of all active debtors currently referred to the SDC program. Select how you would like to receive the report.

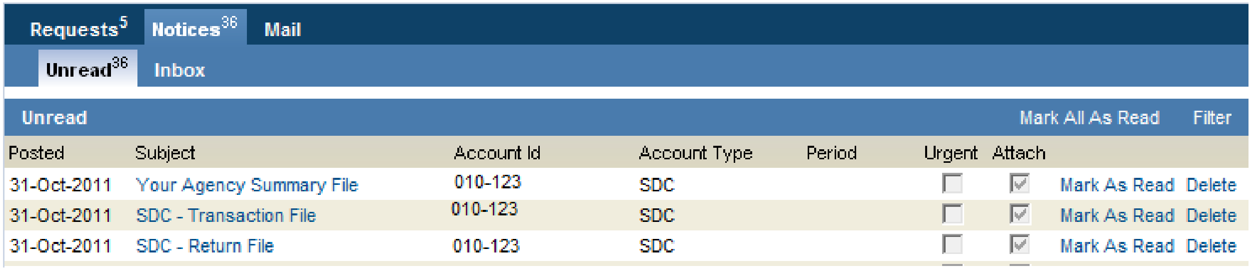
Agency Summary

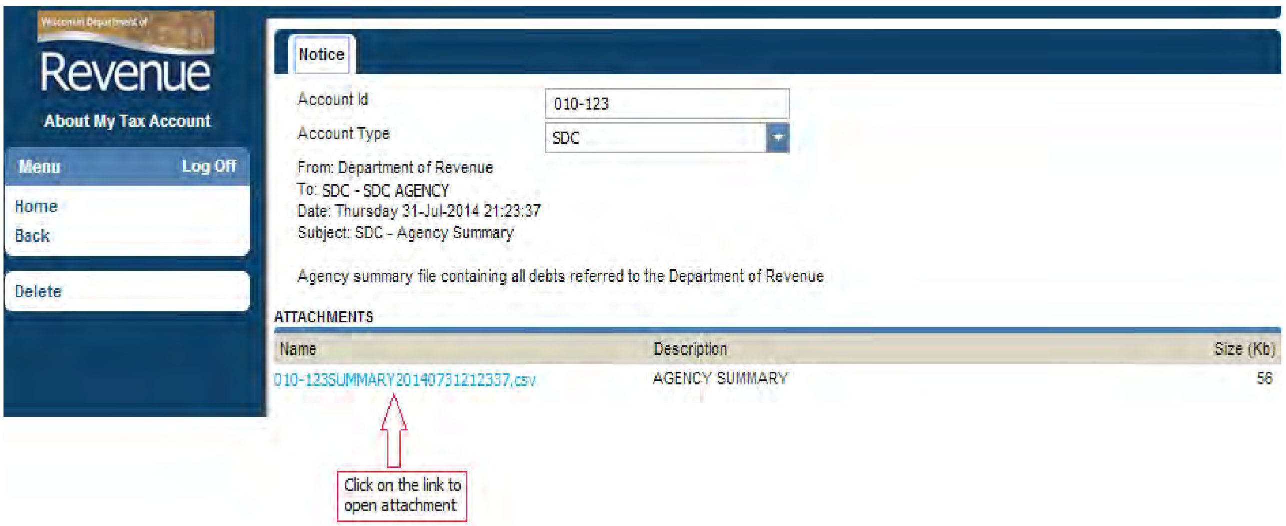
File Type: MTA-CSV

- MTA-CSV
- MTA-TXT
- sFTP - Flat File
- sFTP - XML

  - MTA-CSV – Opens in MS Excel, formatted.
  - MTA-TXT – Opens in MS Notepad, unformatted.
  - sFTP-Flat File - sent using the flat file layout through DOR's secure portal.
  - sFTP-XML - sent using the XML File through DOR's secure portal

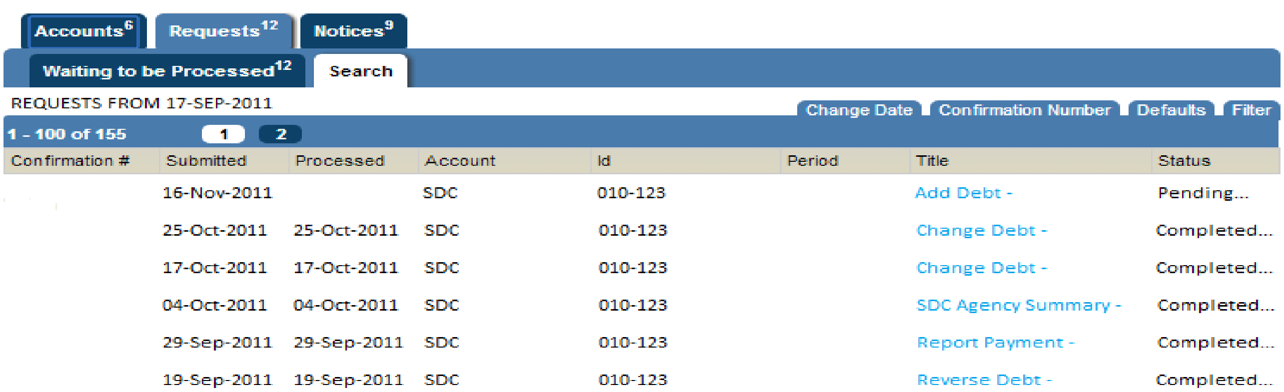
- The My Tax Account report types will be sent to you through an attachment in a Notice.





View Requests

- Every action you take to submit a new debt or update a debt becomes a request. Requests are stored for your reference.

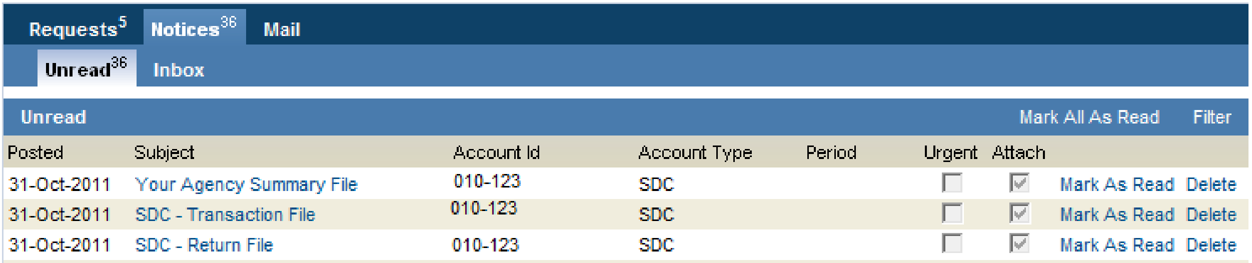


- All requests are displayed together. Pending requests are requests that have been submitted but not yet processed by DOR. A pending request can be withdrawn and resubmitted. DOR picks up requests for processing at 4:00 pm every business day.

  - **Change Date:** You can search for different date ranges.
  - **Confirmation Number:** You can search by entering the confirmation number.
  - **Defaults:** Not an option for *My Tax Account.*
  - **Filter:** You can filter to display specific information like name, status or title.

- To view pending requests, click on the **'Waiting to be Processed'** tab. The number of pending requests is displayed next to the tab.

Notices



- Notices are a mechanism for DOR to communicate with My Tax Account users. If your agency selected to use the portal to submit debts, then all reports will be distributed to your agency using attachments in Notices.
  - Transaction File
  - Return File
  - Account Summary File