eLevy
User Guide

For Financial Institutions

DOR Contact Information for eLevy Questions:
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Registration & Accessing your Bank Levy Account

New User Registration

All new users for the Department of Revenue's (DOR) My Tax Account system must register for a unique user name and password. Shared registrations are not allowed for security purposes. If you are already registered, please skip to Accessing eLevy.

1. Go to [https://tap.revenue.wi.gov](https://tap.revenue.wi.gov) and click New user? Create new username

2. Click Step 1: Enter Profile Information and complete the logon information. Select No for "Are You a 3rd Party Preparer?" This question does not apply for levy processors. Click Next when complete.
3. Click **Step 2: Enter Customer Information** and enter your financial institution’s Federal Employer Identification Number (FEIN), name, and zip code. Click **Next** when complete.

4. Click **Submit** to complete your registration. **Do NOT complete Step 3: Account Access (Optional)**
5. Click **Agree** on the pop up disclosure. A confirmation screen displays.

6. We will send a security code to your email address. You must enter this code the first time you log on to **My Tax Account**. If you do not receive this email, contact us at 608-327-0477.

7. The first time you log in, you will need to choose how you will receive two-stage authentication. Choose an option from the drop down and enter the requested information, then click **Save**.

8. You will not have any eLevy account access until an employee with sufficient authority at your financial institution submits an **eLevy User Access Form** to authorize your access to view eLevy data. This form is available at [https://www.revenue.wi.gov/Pages/Businesses/E-Levy-home.aspx](https://www.revenue.wi.gov/Pages/Businesses/E-Levy-home.aspx) and includes instructions on how to return it to DOR for processing. DOR staff will notify you by email once access is granted.
Accessing eLevy

1. Go to [https://tap.revenue.wi.gov](https://tap.revenue.wi.gov) and log on with your Logon ID and password. (see [New User Registration](#)).

2. You may need to confirm your identification and authenticate your session. Click the button to **Send Security Code**. You should receive it by email or text shortly.

3. Enter the code and log in. You may choose **Yes** under **Trust this Browser** to reduce how often you have to enter a security code. Once you have made your election, click **Log in**.
4. The *My Tax Account* customer level page displays. The *Bank Levy* account displays under *My Accounts*. If you do not see your Bank Levy account, contact us at (608) 327-0477 or email us at DORFinancialRecordMatching@wisconsin.gov.

Tabs available from the customer level:

- **Accounts**: Accounts for which you have access to view or make requests.
- **Submissions**: Requests you make through the *My Tax Account* portal. View details by clicking on submission description.
- **Mail**: Communications from DOR, such as planned system outages or training webinars.
- **Names and Addresses**: Your financial institution’s information.

**I WANT TO…**

This box displays on most screens and contains a menu of available options. Only the *View my Profile* option on the customer level page applies to levy processors. Here you may update your contact information, password, security questions, and saved payment accounts.

5. Click on *Bank Levy* to open your eLevy account. The eLevy account displays.
Tabs available from the account level:

- **All Bank Levy Requests**: Requests made through eLevy to make a levy payment or provide a no funds levy response by anyone at your financial institution and its processing status. View details on each request by clicking the confirmation number.
- **Submissions**: Requests you have created.
- **Mail**: View unread responses to levy inquiry messages and PDF copies of levy letters. Click the letter Type to open. View all will show read messages and PDFs.
  - **Note**: Letters display in the Mail tab only for financial institutions that choose to receive mail electronically. To enroll in electronic delivery, complete an *Electronic Delivery Authorization* form, available at [https://www.revenue.wi.gov/Pages/Businesses/E-Levy-home.aspx](https://www.revenue.wi.gov/Pages/Businesses/E-Levy-home.aspx).
- **Names and Addresses**: Your financial institution's information and account level information.

**I WANT TO…**

- **Close Account**: Bank Levy accounts cannot be closed by users. Please contact us if your institution's Bank Levy account needs to be closed.
- **Make Bank Levy Payments**: To remit captured funds.
- **Send Bank Levy Inquiry**: Send a secure message to us with general questions about levy processing or questions about how to process a specific levy.
- **Update Levy Response**: No fund responses (no account found, account closed, no funds available, dormant account, or protected/exempt funds).
Processing Levy Orders
Making No Funds Levy Responses

1. Logon to My Tax Account and open the Bank Levy account.

2. In the I Want To... section, click on Update Levy Response.

3. A list of active levies displays. Continuous levies have a checkmark in the continuous column. If you need assistance with how to process a continuous levy, please call (609) 327-0477 or email DORFinancialRecordMatching@wisconsin.gov.

If you are not submitting a payment, enter the status of the levy for each debtor and letter ID combination by checking the appropriate box. The key at the top of the page defines available options:

For each debtor listed below, check the box that best fits the individual's levy status:
- NF: Account exists, but not enough funds
- NA: No account found
- DA: Account has minimal funds, but no activity/dormant
- PE: Only protected or exempt funds
- AC: Account closed, (enter closed date)

If the levy is continuous, update the status once per month.

If you are unable to select a response (the box is slightly shaded), then the levy is closed. If you have questions on why you are not able to respond to a levy, please call (608) 327-0477 or email DORFinancialRecordMatching@wisconsin.gov.
4. When you are done entering levy responses, click **Submit** at the top of the screen.

You can save your progress at any time by clicking **Save** at the top or bottom of the screen. Once saved, you have the option to **Continue Editing** or **Finish Later**.

If you **Save** and **Finish Later**, see [Viewing and Changing Requests](#) to complete and submit your request.

5. You will receive a confirmation number after you submit a request. Requests are processed at approximately 4:00pm daily.
Making Levy Responses with Funds

1. Logon to My Tax Account and open the Bank Levy account.

2. In the I Want To... section, click on Make a Bank Levy Payments.

3. A list of active levies displays. Continuous (ongoing) levies have a checkmark in the continuous column; otherwise the levy is a non-continuous (one-time) levy.

To remit funds, type the amount you are sending in the Levy Proceeds box for each levy. You may enter any amount between $0.01 and the full amount of the levy. You are not required to send levy payments if less than $20.00 is available for capture, and may respond "NF" under the Update Levy Response page instead.

If you are unable to enter an amount in the Levy Proceeds column, then the levy is closed. If you have questions on why you are not able to remit funds, please call (608) 327-0477 or email DORFinancialRecordMatching@wisconsin.gov.
4. Choose your payment source. If you have a saved payment account, click Default. Otherwise, click New and enter the type of account and the routing and account number. All payments must originate from US-based accounts.

Indicate the payment date. The date defaults to the current processing day. You may schedule a future payment, however we strongly advise against it. Many levy orders are amended or released during the hold period.

Type the total payment amount into the Confirm Amount box to confirm your total payment.

5. Click the Submit button at the top or bottom of the page. Selecting Cancel deletes your request.

You will receive a confirmation number after you submit a payment. Requests are processed at approximately 4:00pm daily.
Other Features of eLevy
Searching for a Specific Levy

1. Sort by Column

eLevy defaults levy orders from oldest to newest. You can change the sort order by clicking on the heading of any column. For example, clicking on the Primary Debtor column will sort the list by debtor name from A to Z.

Clicking twice on a column header will reverse the order Z to A.

You may also find it useful to sort by issued date while inputting responses or payments.

2. Filter Tab

Click on Filter to open a search box. You can search for any criteria (name, last 4 digits of SSN, Letter ID, due date, etc.). The list of accounts now displays only the results containing the search criteria. You can close the filter by clicking on the blue X in the far right side of the search box.
Viewing and Changing Requests

The **Submission** tab on the Bank Levy account level allows you to view all requests made through eLevy. You can check the status of a request, make changes to requests that are **Pending** or **Not Filed**, or review processed requests.

Requests process at 4:00pm daily. Until that time, submitted requests are considered **Pending** and can be changed or deleted.

Requests saved to complete later are considered **Not Filed** and can be reopened at any time to finish.

To edit a submitted request that is still pending or has not been filed:

1. To make changes to a request you submitted, but is still pending, click **Submissions**. Under **Submitted** will be a list of requests submitted that day. Click the type of request to open it.

   ![View, Edit, or Delete pending request](image)

   Click **View, Edit**, or **Delete** to view, edit, or delete the pending request. If no changes are made, it will process as originally submitted at approximately 4:00pm.

2. If you saved a request to complete later, click **Submissions**. Under **Not Submitted** will be a list of all requests created and saved but not submitted. Click the type of request to open it.

   ![View, Edit, or Delete unfiled request](image)

   Click **View, Edit**, or **Delete** to view, edit, or delete the unfiled request. If no changes are made, it will remain **Not Filed**.
Submitting an Inquiry

Bank Levy Inquiry is a tool that allows you to communicate with department staff safely and securely. Similar to email, you enter a subject line and comments in a text box, then submit. If you have questions related to a specific levy, you may include details such as a complete SSN and name, and know the data is secure.

1. On the eLevy homepage, click **Send Bank Levy Inquiry** in the I Want To… section.

2. Fill in a subject and a message. If you are asking about a specific levy, please include identifying information about that levy for department staff to reference. Click **Submit** at the top or bottom when complete.

3. DOR reviews and responds to inquiries within two business days. Responses display in the **Mail** tab at the Bank Levy account level. Click the blue subject link to view the response.
Electronic Delivery of Levy Correspondence

We offer the option for financial institutions to receive all levy correspondence electronically through their Bank Levy account. With electronic delivery, levy letters are saved to your Bank Levy account as PDF files each night, and can be viewed in the Mail tab. An email is sent to alert you to review new levies or changes to levy orders.


To view new levy mail in My Tax Account:

1. Open your Bank Levy account and click the Mail tab. New levy mail will show under Unread Letters. Click a letter type to open a specific letter.

2. If your mail has already been read, click View All or No unread letters to view. Click a letter type to open a specific letter.

3. You can choose to print or save the PDF file. To view and print My Tax Account documents, you must have a current version of Adobe Reader.
Contact/Questions

We are always happy to help. Our contact information is:

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