e-Levy User Guide
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Registration & Accessing your e-Levy Account

New User Registration

All new users for the Department of Revenue’s (DOR) My Tax Account system must register for a unique username and password. Shared registrations are not allowed for security purposes. If you are already registered, please skip to Accessing e-Levy. You must have a username before we can grant e-Levy access.

1. Go to https://tap.revenue.wi.gov and click New? Create new username

2. Complete the first section, Enter Profile Information, with your desired username, password, and contact information. Select No for "Are You a Third Party Preparer?" This question does not apply for levy processors. Click Next when complete.
3. Click **Next** to continue and enter the **Customer Information** with your business’ Federal Employer Identification Number (FEIN), name, and zip code. Click **Next** when complete.

**Customer Information**

My Tax Account has Three levels of access: Master, Administrator, and Account Manager. The first user to complete an access request will automatically receive Master access. All subsequent users who request access will initially receive Account Manager access. The Master is able to manage access for all Account Managers. Additionally, the Master is able to promote Account Managers to Administrator access which will allow the logon to manage Account Managers as well.

**ID Type**

Federal Employer ID Number

11-2233456

**Customer Last or Business Name**

THE PIGGY BANK

**Customer Zip Code**

53713
4. If you will only be processing levies, choose "Yes" for "Are you an active business customer?" Click Next.

5. DO NOT ENTER ANYTHING. Click Submit.

6. Click OK on the pop-up acknowledgement to verify your understanding that usernames cannot be shared.
A confirmation screen will display. Click **OK** to go back to the login screen.

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**Confirmation**

Thank you for registering for My Tax Account.

Your confirmation number is **0-843-770-464**. Please keep this for your records.

You will receive an email confirmation from the Wisconsin Department of Revenue that includes an authorization code. You will need this authorization code the first time you login to My Tax Account.

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7. **Login using your new credentials.**

8. **The first time you login, you will be given the different options for two-factor authentication. We highly recommend you use two-factor authentication. Choose your desired type of two-factor notification, enter the appropriate information, and click **Confirm** to continue and enter your account.**

**Protect your My Tax Account profile with two-step verification**

Use two-step verification to protect your My Tax Account profile. Once set up, you will receive a unique security code to verify your identity each time you log in.

<table>
<thead>
<tr>
<th>Authentication App</th>
<th>Text Message</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use an authentication app, such as Google Authenticator, to get security codes.</td>
<td>Receive security codes by text message.</td>
<td>Receive security codes by email.</td>
</tr>
<tr>
<td><strong>Set Up</strong></td>
<td><strong>Add/Change Phone</strong></td>
<td><strong>Add/Change Email</strong></td>
</tr>
<tr>
<td></td>
<td>Message and data rates may apply. To stop receiving SMS messages, remove your number above.</td>
<td></td>
</tr>
</tbody>
</table>

Don’t want to use two-step verification? **Disable**

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9. **STOP. You will not have e-Levy account access until an employee with enough authority at your business submits an **e-Levy User Access Form** authorizing your access to view e-Levy 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 us for processing. DOR staff will notify you by email once access is granted.**
Accessing e-Levy

1. Go to https://tap.revenue.wi.gov and log on with your Logon ID and password. (see New User Registration if you need to create a username and password).

![Login Screen]

2. You may need to authenticate your session. The system will automatically send you a code by email, text, or ask you to review your authentication device. Additionally, you may check the box next to Trust this device to reduce how often you must enter a security code.

   Once you have entered the code, click Confirm.

   ![Verify Security Code]

3. The My Tax Account customer level page displays. The Levy account displays automatically. If you do not see your Levy account, contact us. An e-Levy User Access Form may be required or in process.

   ![My Tax Account]

   THE PIGGY BANK
   2135 RIMROCK RD
   MADISON WI 53713-1443

   Welcome, ELEVY USERGUIDE
   You last logged in on Thursday, Jul 22, 2021 1:28:16 PM
   Manage My Profile
Tabs available:
- **Summary**: Default screen which shows account types user has access to and common actions taken on those account types
- **Action Center**: Unread letters and messages or required actions are highlighted
- **Settings**: Summary of user’s accesses, mail delivery, and payment sources
  - NOTE: Users cannot elect to receive levy notices electronically through My Tax Account. Please contact us if you would like to receive levy notices electronically.
- **More…**: Payments and returns (for users with other types of access), letters, messages, submissions, names and addresses, and W2/1099 submissions

### Processing Levy Orders
**Making No Funds Levy Responses**

1. Logon to **My Tax Account** and scroll to the levy account

2. Click **Update Levy Response**

<table>
<thead>
<tr>
<th>THE PIGGY BANK</th>
</tr>
</thead>
<tbody>
<tr>
<td>2135 RIMROCK RD</td>
</tr>
<tr>
<td>MADISON WI 53713-1443</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Summary</th>
<th>Action Center</th>
<th>Settings</th>
<th>More...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Levy</td>
<td>2135 RIMROCK RD</td>
<td>MADISON WI 53713-1443</td>
<td>Filing Frequency: None</td>
</tr>
<tr>
<td>993-1020000000-02</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Balance</td>
<td>$0.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. A list of levies displays.

A key to describe the nonpayment responses is at the top left. Your user information shows under preparer information on the top right.

The debtor list shows the issued date of the levy, the primary (first listed on the notice) debtor’s name, the last four digits of the primary debtor’s SSN or FEIN, a box to remind you of an additional debtor, the letter ID of the levy notice (and a link to it if you receive levy notices electronically), a box to remind you if a levy is continuous or not, the levy amount, and boxes that can be checked with an appropriate levy response.

If the levy is continuous, place a hold on any funds owned by or due to the debtor, up to the full levy amount. Remit funds to DOR or update the reason for no funds once every 30 days. A certain number of consecutive no funds responses will release a continuous levy. We will send an updated notice after the response processes.
Update Levies

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 Add’l ID is checked you can view Levy notice to see secondary debtor/ID.

To submit, you must **update** the status for at least one debtor.

### Debtor List

<table>
<thead>
<tr>
<th>Issued Date</th>
<th>Primary Debtor</th>
<th>ID</th>
<th>Add’l ID</th>
<th>Letter ID</th>
<th>Continuous</th>
<th>Levy Amount</th>
<th>NF</th>
<th>NA</th>
<th>DA</th>
<th>PE</th>
<th>AC</th>
<th>Closed Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>05-Sep-2021</td>
<td>LUKE SKYWALKER</td>
<td>5555</td>
<td></td>
<td>L484584848484</td>
<td></td>
<td>3.482.37</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>05-Sep-2021</td>
<td>HAN SOLO</td>
<td>7777</td>
<td></td>
<td>L929292929292</td>
<td></td>
<td>6.085.28</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If there will not be a payment, enter the response of the levy for the debtor and letter ID combination by checking the appropriate box.

If you are unable to select a response (the box is slightly shaded) the levy is closed. If you have questions on why you are not able to respond to a levy, please contact us.

4. **When you are done entering levy responses, click Submit at the bottom of the screen.**

You can save your progress at any time by clicking **Save Draft** at the bottom of the screen. The confirmation screen will give you the option to **Continue Editing** or **Finish Later**.

If you **Save Draft** 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 daily at approximately 4 p.m. CST. Requests submitted after this time will not process until the next business day.

### Confirmation

By clicking submit the following levies will be updated according to the information you have provided.
Making Levy Responses with Funds

1. Logon to My Tax Account and scroll to the levy account

2. Click Make Levy Payments

The debtor list shows the primary debtor's (first listed on the notice) name, the last four digits of the primary debtor's SSN or FEIN, a box to remind you of an additional debtor, the letter ID of the levy notice (and a link to it if you receive levy notices electronically), a box to remind you if a levy is continuous or not, the levy amount, a place for you to enter levy proceeds, the issued date, the due date (when we expect a response), and a changed date which is used to alert you that the levy has been amended or released.

Continuous levies have a checkmark in the continuous column. Place a hold on any funds owned by or due to the debtor, up to the full levy amount, and remit them to us at least once every 30 days. We will send you an updated notice after the payment processes.
Payment Source
Type
Direct Debit

Bank Account Type
- Checking
- General Ledger
- Savings

Routing Number
Required

Populate Routing Number
Account Number
Required

Confirm Account Number
Required

Save this payment source for future use
No Yes

Payment
Payment Date
22-Jul-2021

Amount
Required

Confirm Amount
Required

Email Address: dorfinancialrecordmatching@wisconsin.g
Phone Number: (608) 327-0477

If your phone number or email address has changed, go to "Manage My Profile" on your home page and update your information.

You must enter at least one amount below.

Debtor List

<table>
<thead>
<tr>
<th>Primary Debtor</th>
<th>ID</th>
<th>Add'l ID</th>
<th>Letter ID</th>
<th>Continuous</th>
<th>Levy Amount</th>
<th>Levy Proceeds</th>
<th>Issued Date</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>LUKE SKYWALKER</td>
<td>5555</td>
<td></td>
<td>L4848484848</td>
<td></td>
<td>3,482.37</td>
<td>0.00</td>
<td>05-Sep-20</td>
<td>05-Oct-20</td>
</tr>
<tr>
<td>HAN SOLO</td>
<td>7777</td>
<td></td>
<td>L9292929292</td>
<td></td>
<td>6,085.28</td>
<td>0.00</td>
<td>05-Sep-20</td>
<td>05-Oct-20</td>
</tr>
</tbody>
</table>

Notes:
You must authorize payment before 4:00 PM Central Time on the payment due date for timely payment.

If you are new to My Tax Account or have changed financial institutions and have fraud protection, you must provide your financial institution with the following department originator number for Levy: X000015200

Cancel Submit
4. Choose your payment source. If you have a saved payment account, verify that Default is highlighted and the correct saved account is showing. 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. DOR strongly advises against choosing a future payment date because levy orders may be amended or released during the hold period.

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 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 contact us.

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

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

You will receive a confirmation number after you submit a payment. Requests are processed daily at approximately 4 p.m. CST.
Other Features of e-Levy

Searching for a Specific Levy

Sort by Column

e-Levy defaults levy orders from oldest to newest. You can change the sort order by clicking the heading of any column.

For example, clicking the Primary Debtor column header once will sort the list by debtor name from A to Z. Clicking on the column header twice will reverse the order Z to A.

You may also find it useful to sort by Issued Date while inputting responses or payments.

Filtering

Click the to open a search box. You can search for any criteria (name, last four 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 the blue X in the right side of the search box.

Exporting

Click Export to download an XML file of submissions or debtor lists. XML files can be opened in Microsoft Excel for review.
Viewing and Changing Submissions

You may view submissions made by you or any other user at your business for the account types you have authority to view.

To find submissions, click More... at the top of the customer level, then click Search Submissions under Submissions on the lower left.

The default view is Processed submissions. You may also view Deleted or Rejected submissions by choosing the appropriate option. You may also change the date range.

Draft submissions were saved to finish later. You can find them either through the Action Center or the Submissions screen described above. Pending submissions have been submitted but not yet processed and are only under the Submissions screen.
You can only change your own submissions, and only if they are drafts or pending. Requests process daily at approximately 4 p.m. CST.

To edit a draft or pending request, open the submission then click Continue Editing.

This will reopen the request so you may make the appropriate changes. Once you have made changes, click Submit at the bottom.

You may also choose Delete to delete the request instead.

Submitting an Inquiry

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. Logon to My Tax Account and scroll to the levy account
2. Click Send Levy Inquiry.

3. Most often your request will be related to a levy issued to your business. Choose your business from the list, then click Next.
4. Compose your message as you would an email. You may also include attachments. Click **Submit** to send it to DOR. Please allow two business days for a response.

**Message**

**Subject:** Request Electronic Delivery of Levy Notices

**Message:**

Hello:

How can we request electronic delivery of levy notices? We would like to start receiving them through e Levy instead of through the mail.

Thank you,

e Levy Userguide

**Attachments**

There are no attachments.

5. Responses can be found in the customer level's **Action Center**…

**THE PIGGY BANK**

2135 RIMROCK RD

MADISON WI 53713-1443

You have an unread message

Messages sent to you may contain important information about your accounts.

**View Messages**
6. **The Inbox** will display. Click the message’s subject line to read our response.

7. Once you have read the response, you may either **Reply** or **Archive** the message.

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**Electronic Delivery of Levy Correspondence**

We offer the option to receive all levy correspondence electronically through My Tax Account. With electronic delivery, new levy letters are uploaded as PDF files each night instead of coming to you by postal mail. An email is sent to alert you to review new levies or changes to levy orders.

To enroll in electronic delivery, complete and return 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)
NOTE: Users cannot elect to receive levy notices electronically through My Tax Account. Please contact us if you would like to receive levy notices electronically.

To view new levy mail in My Tax Account:

1. Logon to My Tax Account and click either Action Center then View Letters…

2. …or More… then View Letters.

3. Unread letters will be in bold. Read letters will not. Click on the letter type to open a specific letter.

NOTE: Letters will show as unread for any user who has not read it. If you know another user has reviewed a levy, you may archive it.

Letters

Letters older than 12 months can be found using the search.

THE PIGGY BANK
2135 RIMROCK RD
MADISON WI 53713-1443

Inbox Archived Search

Mail

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Letter ID</th>
<th>Account</th>
<th>Account ID</th>
<th>Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>10-Sep-2021</td>
<td>Levy Notice - Std Bank</td>
<td>L99999999999</td>
<td>Levy</td>
<td>993-1020000000-02</td>
<td>Archive</td>
</tr>
<tr>
<td>10-Sep-2021</td>
<td>Levy Notice - Std Bank</td>
<td>L48404848484</td>
<td>Levy</td>
<td>993-1020000000-02</td>
<td>Archive</td>
</tr>
</tbody>
</table>

4. Archived letters may be viewed under the Archived tab, while you may also Search for a specific letter by date range, or Filter for a letter ID.
5. 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.

6. Letters are also available on both the Update Levy Response and Make Levy Payments screens but will return you to the home page if you open them there.

**Contact/Questions**

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

- **Phone:** (608) 327-0477
- **Email:** DORFinancialRecordMatching@wisconsin.gov
- **Fax:** (608) 223-6541
- **Mail:**
  Financial Record Matching & Levy Unit
  Wisconsin Department of Revenue
  PO Box 8901
  Madison, WI 53708-8901