Wisconsin Department of Revenue

e-Levy User Guide

R. 10-21

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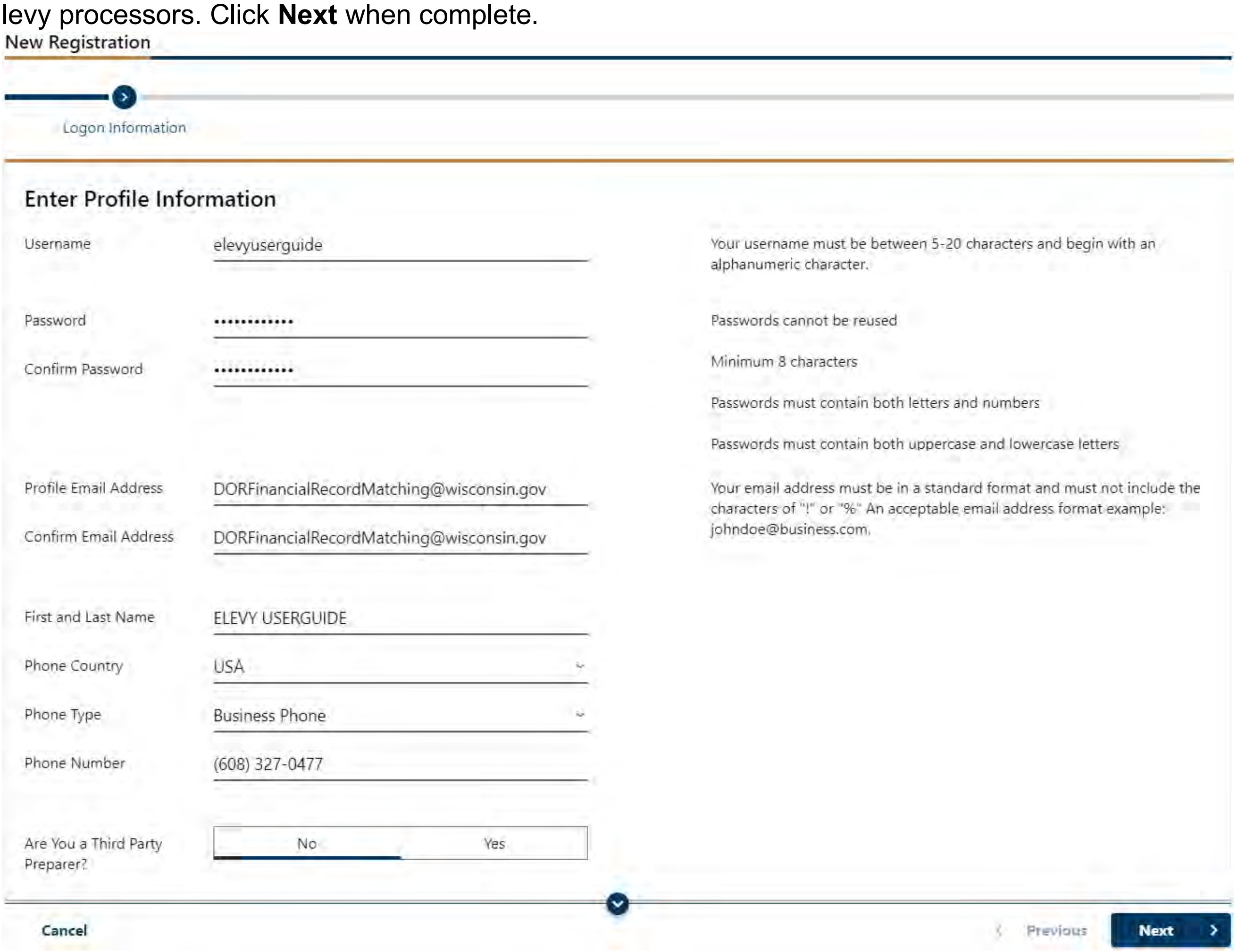
Registration & Accessing your e-Levy Account

New User Registration

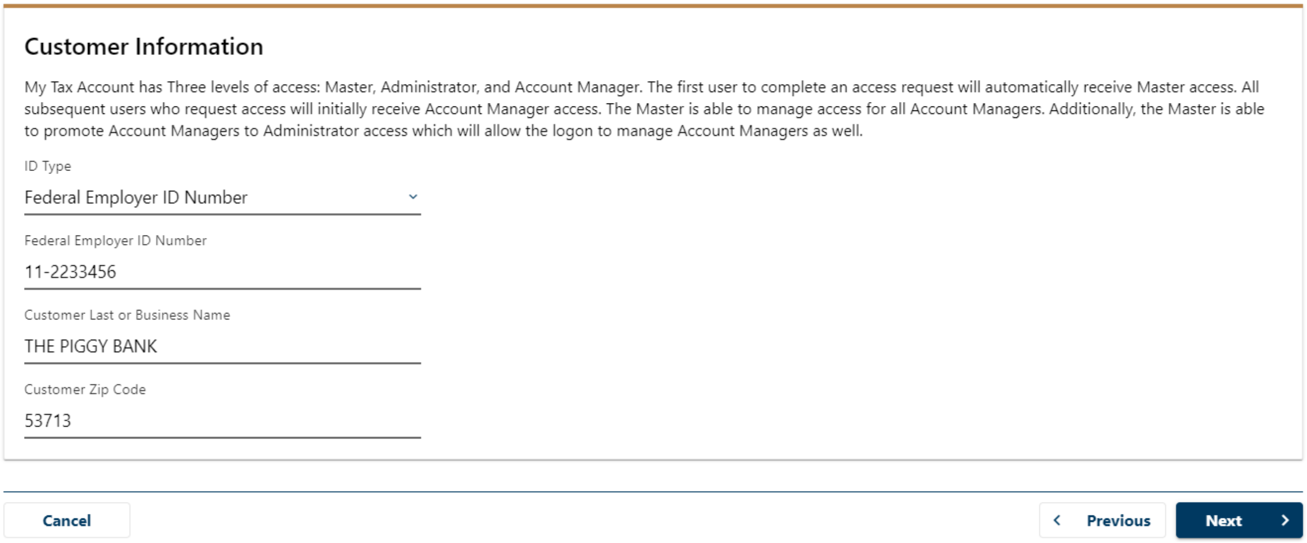
All new users for the Department of Revenue's (DOR) **My Tax Account** system must register for a unique username and password. Shared registrations are not allowed for security purposes. If you are already registered, please skip to [Accessing e-Levy](). **You must have a username before we can grant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



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

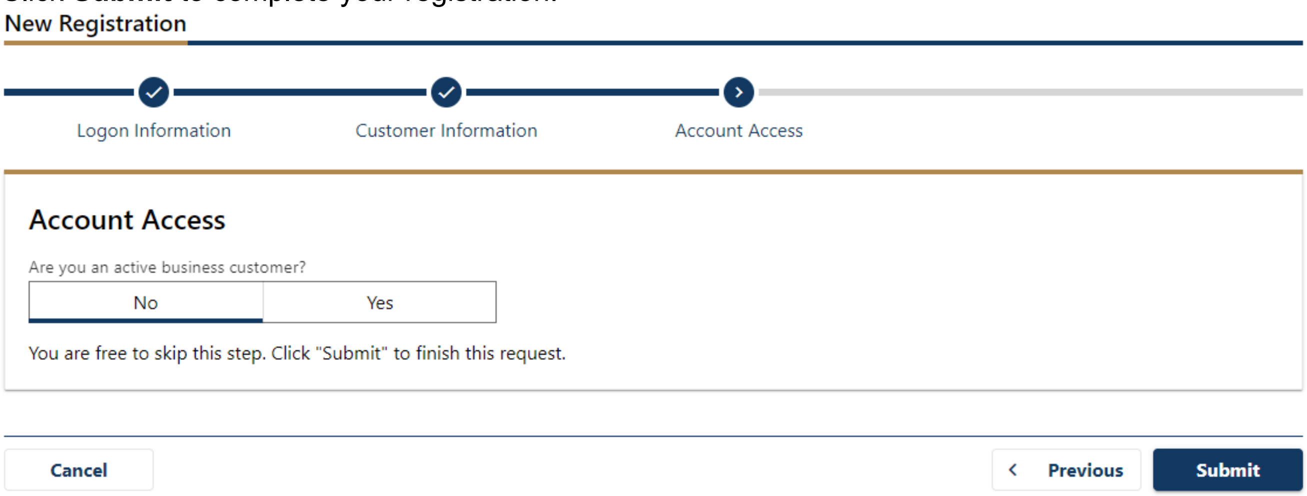
Federal Employer ID Number
11-2233456

Customer Last or Business Name
THE PIGGY BANK

Customer Zip Code
53713

Cancel | Previous | Next

3. **If you will only be processing levies, choose "No" for "Are you an active business customer?"** Click **Submit** to complete your registration.



New Registration

Logon Information | Customer Information | Account Access

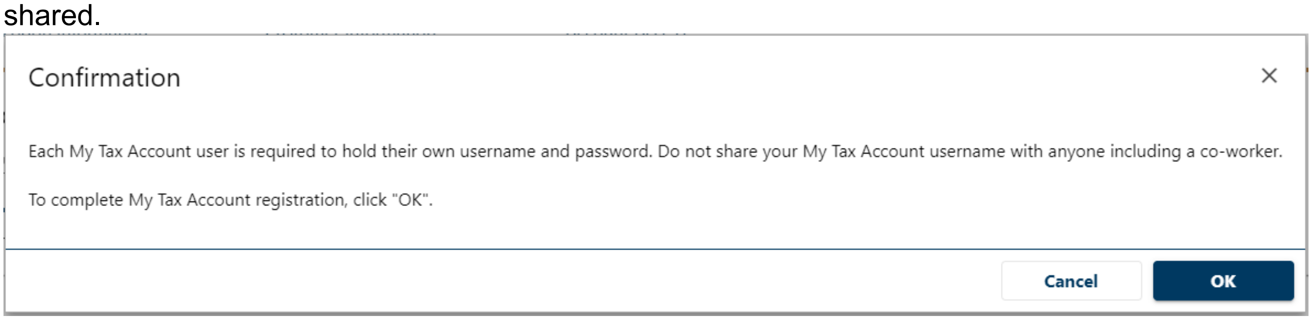
Account Access

Are you an active business customer?
No | Yes

You are free to skip this step. Click "Submit" to finish this request.

Cancel | Previous | Submit

4. Click **OK** on the pop-up acknowledgement to verify your understanding that usernames cannot be shared.



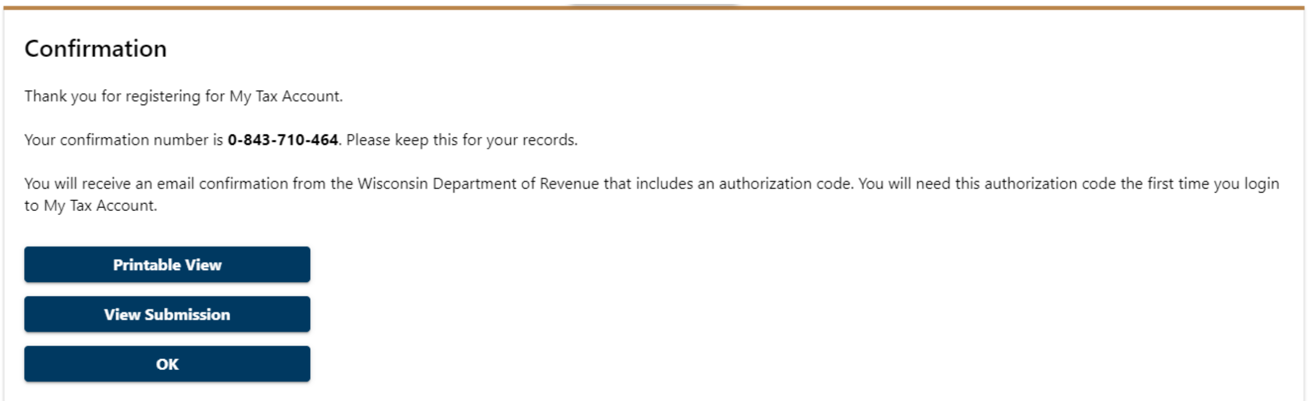
Confirmation

Each My Tax Account user is required to hold their own username and password. Do not share your My Tax Account username with anyone including a co-worker.

To complete My Tax Account registration, click "OK".

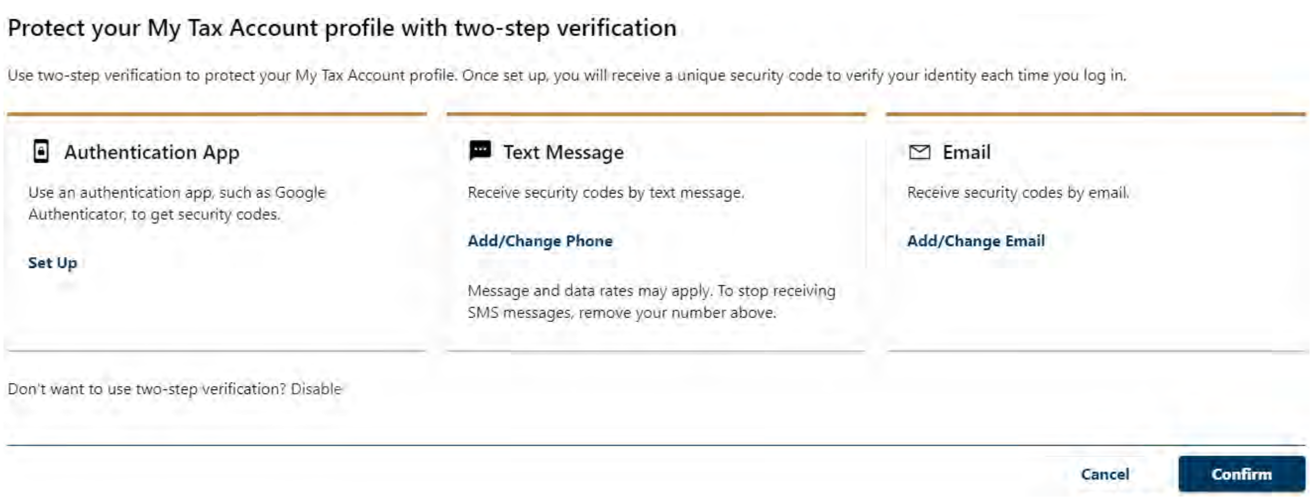
Cancel | OK

A confirmation screen will display. Click **OK** to go back to the login screen.



5. Login using your new credentials.

6. 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.



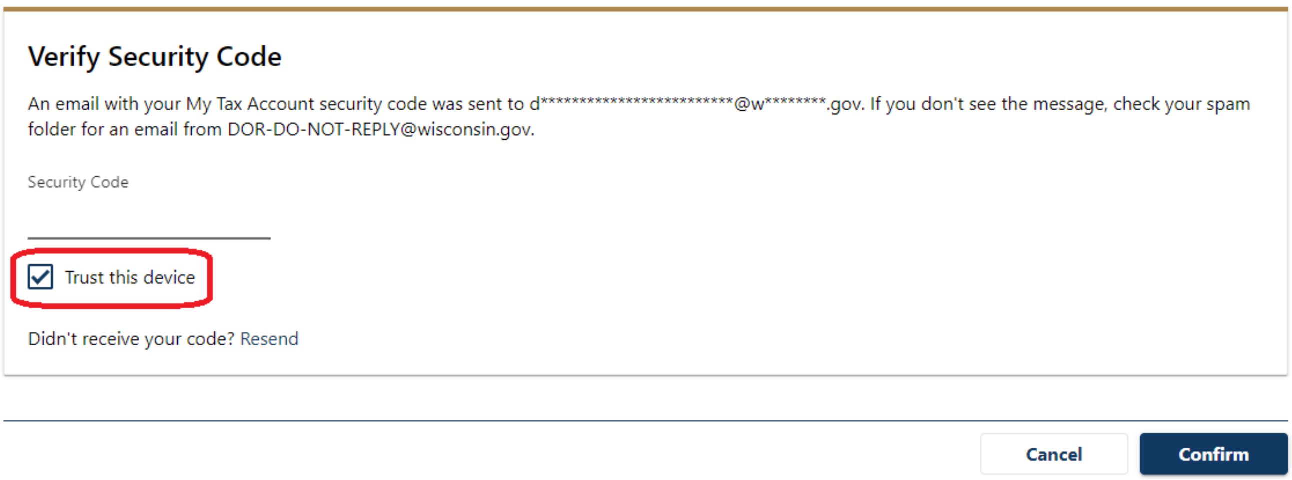
7. **STOP**. You will not have e-Levy account access until an employee with enough authority at your business submits an **e-Levy User Access Form** authorizing your access to view e-Levy data. This form is available at https://www.revenue.wi.gov/Pages/Businesses/E-Levy-home.aspx and includes instructions on how to return it to us for processing. DOR staff will notify you by email once access is granted.

Accessing e-Levy

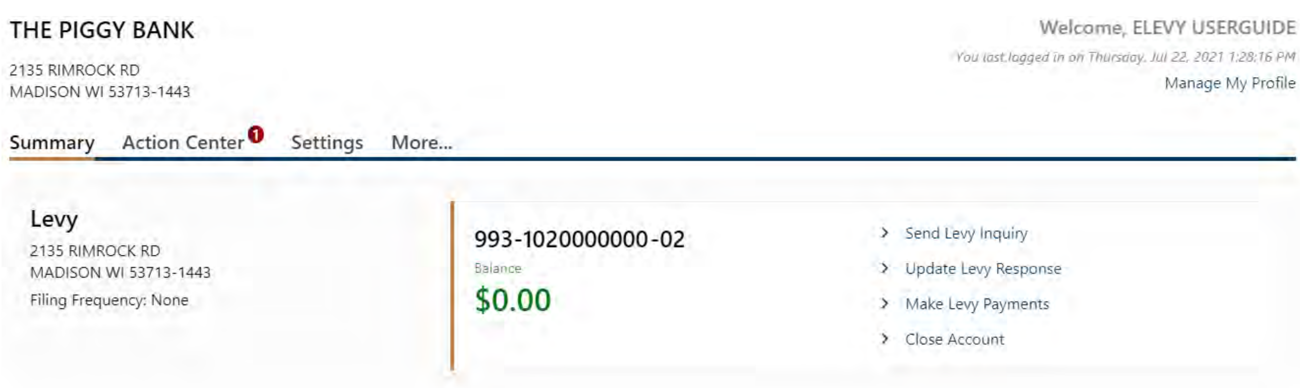
1. Go to https://tap.revenue.wi.gov and log on with your Logon ID and password. (see New User Registration if you need to create a username and password).

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**.



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.



Tabs available:

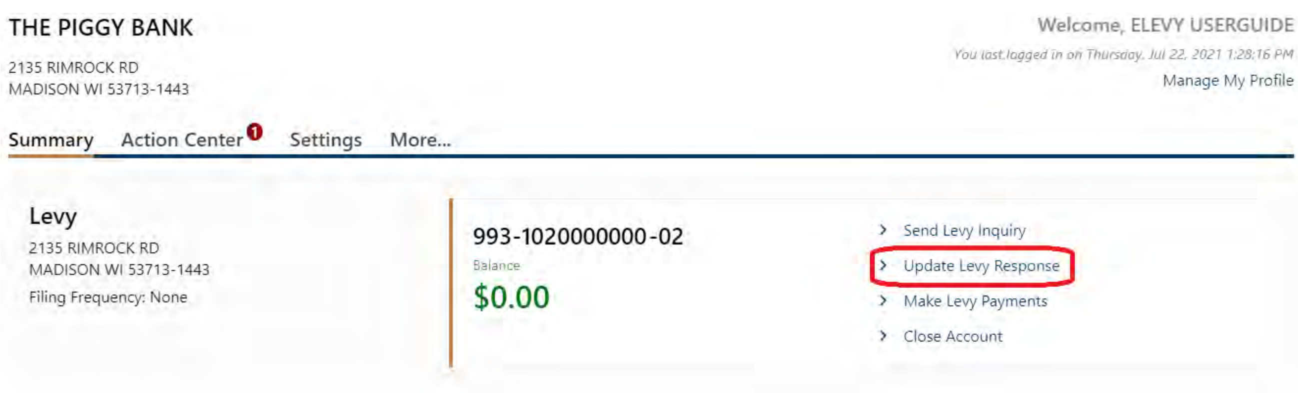
- **Summary**: Default screen which shows account types user has access to and common actions taken on those account types
- **Action Center**: Unread letters and messages or required actions are highlighted
- **Settings**: Summary of user's accesses, mail delivery, and payment sources
    - o **NOTE**: 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**

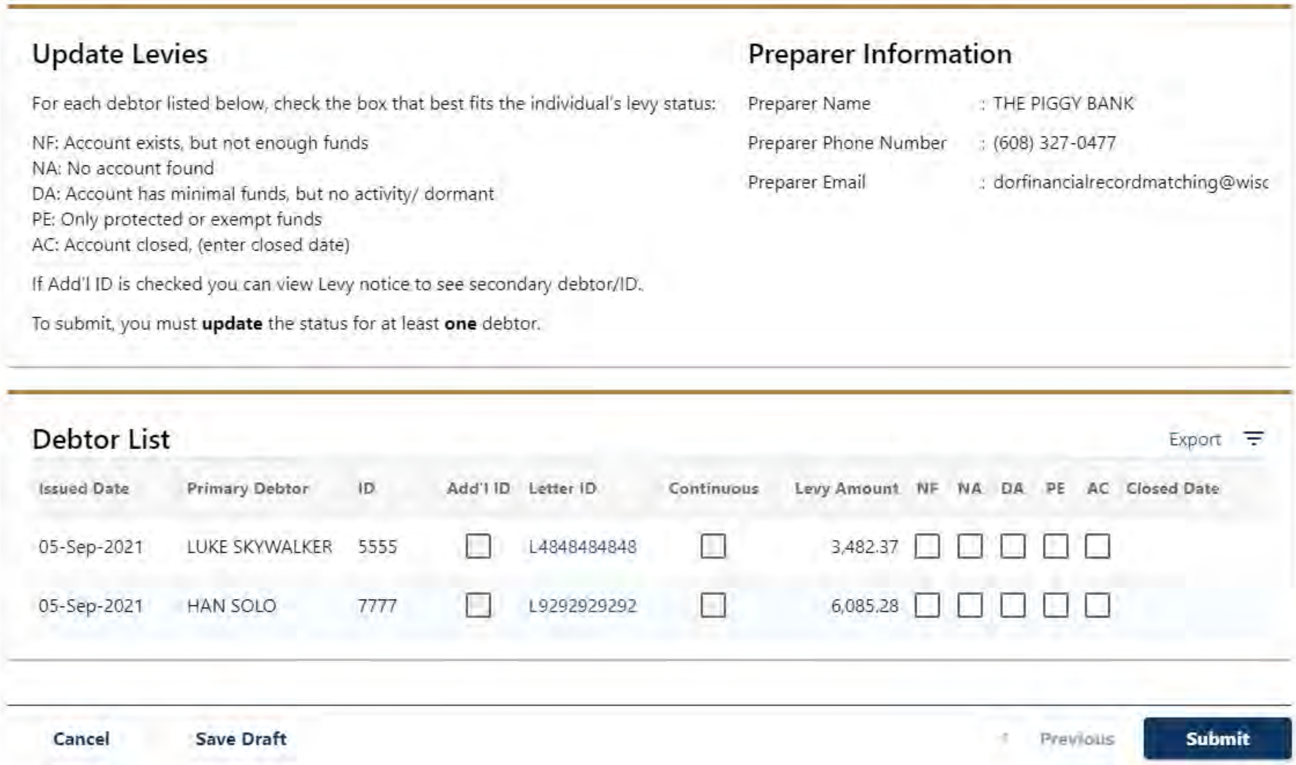


3. A list of levies displays.

   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.



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.

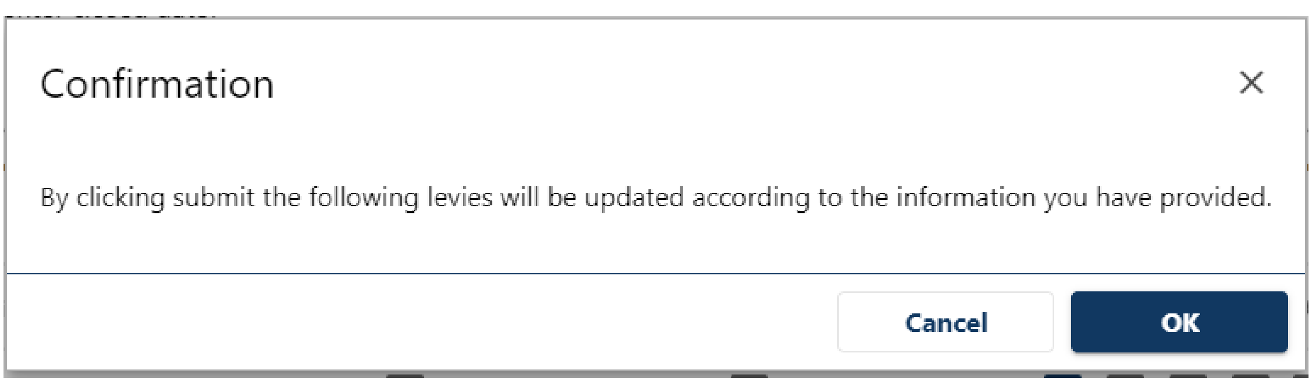
If you are unable to select a response (the box is slightly shaded) the levy is closed. If you have questions on why you are not able to respond to a levy, please contact us.

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.

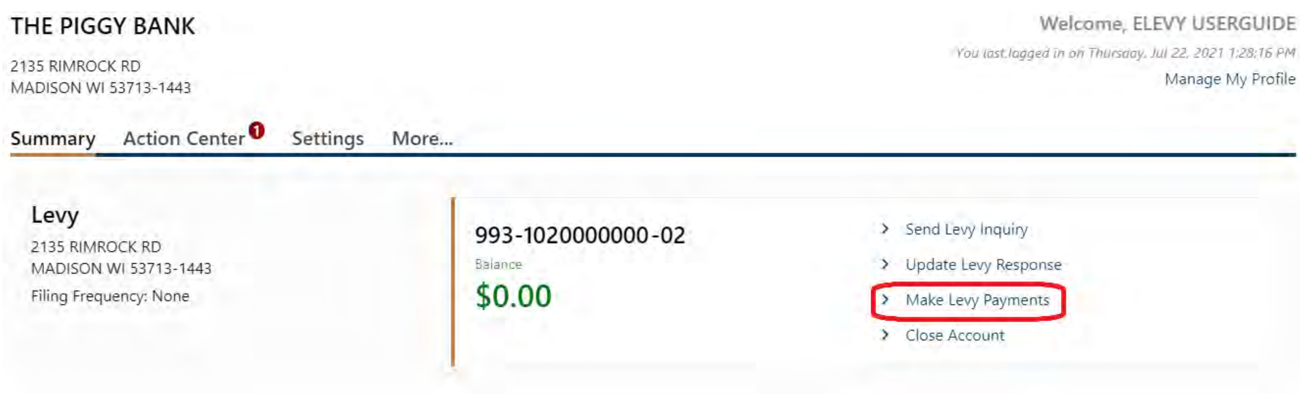
5. You will receive a confirmation number after you submit a request. Requests are processed daily at approximately 4 p.m. CST. Requests submitted after this time will not process until the next business day.



Making Levy Responses with Funds

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

2. Click **Make Levy Payments**



3. The funds responses page displays. The payment source is in the upper left, the payment date and amount confirmation displays in the upper right. A list of levies is towards the bottom.

   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

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

Export

Primary Debtor	ID	Add'l ID	Letter ID	Continuou:	Levy Amount	Levy Proceeds	Issued Dat	Due Date	Changed
LUKE SKYWALKER	5555	☐	L4848484848	☐	3,482.37	0.00	05-Sep-20:	05-Oct-20:	
HAN SOLO	7777	☐	L9292929292	☐	6,085.28	0.00	05-Sep-20:	05-Oct-20:	

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

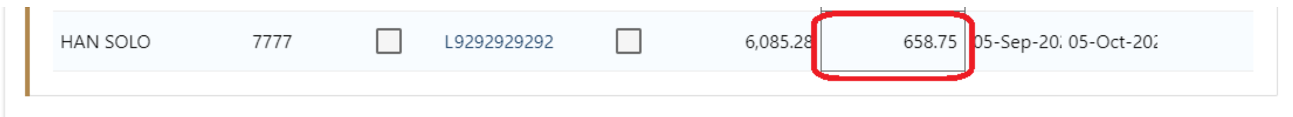
Cancel Submit

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.

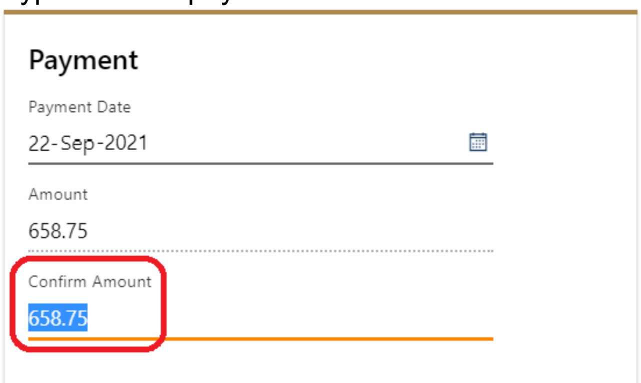
   Indicate the payment date. The date defaults to the current processing day. **DOR strongly advises against choosing a future payment date** because levy orders may be amended or released during the hold period.

   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.

Debtor List   Export

Issued Date	Primary Debtor	ID	Add'l ID	Letter ID	Continuous	Levy Amount	NF	NA	DA	PE	AC	Closed Date
10-Sep-2021	CHEWBACCA	3333	☐	L4848484848	☐	3,639.44	☐	☐	☐	☐	☐	
10-Sep-2021	HAN SOLO	7777	☐	L7676767676	☑	6,148.26	☐	☐	☐	☐	☐	
10-Sep-2021	LEIA ORGANA	2222	☐	L3232323232	☐	1,176.86	☐	☐	☐	☐	☐	
10-Sep-2021	LUKE SKYWALKER	5555	☐	L0404040404	☐	3,518.13	☐	☐	☐	☐	☐	
10-Sep-2021	OBI-WAN KENOBI	1111	☐	L6060606060	☐	5,091.15	☐	☐	☐	☐	☐	
10-Sep-2021	PADME AMIDALA	6666	☐	L8888888888	☐	5,091.15	☐	☐	☐	☐	☐	

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.

Debtor List   Export   solo ✕

Issued Date	Primary Debtor	ID	Add'l ID	Letter ID	Continuous	Levy Amount	NF	NA	DA	PE	AC	Closed Date
05-Sep-2021	HAN SOLO	7777	☐	L9292929292	☐	6,085.28	☐	☐	☐	☐	☐	

Exporting

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

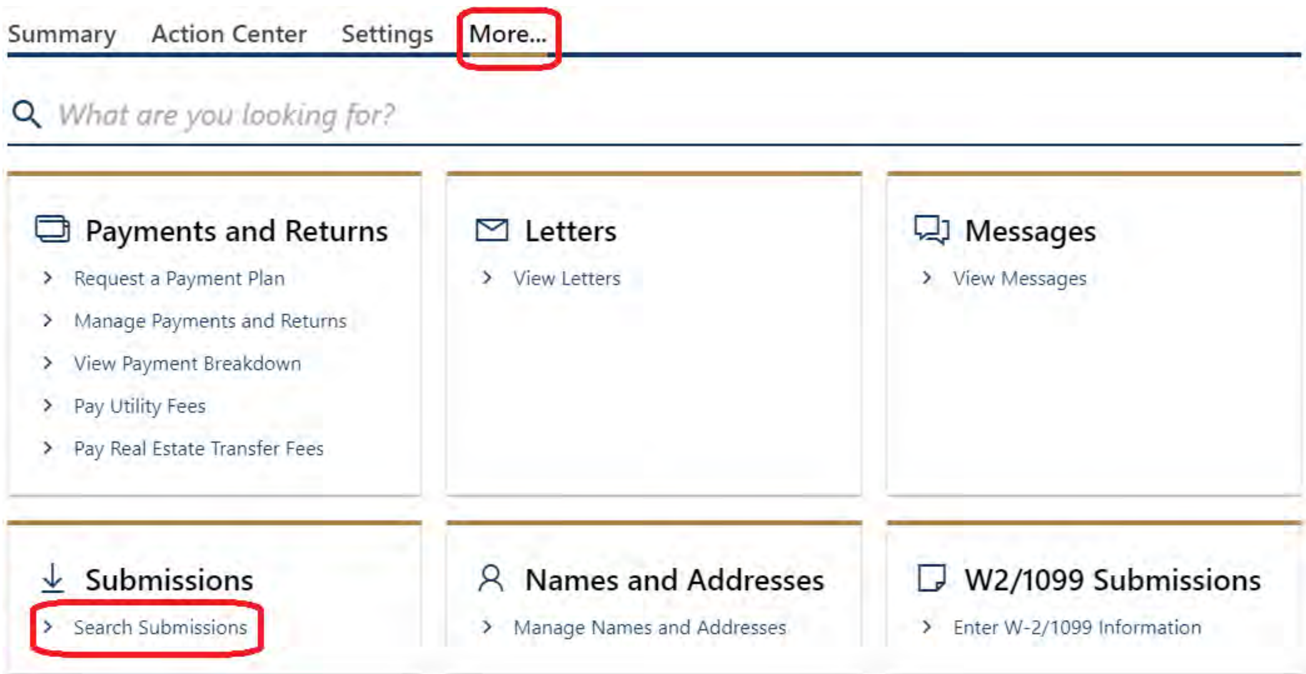
Debtor List   Export

Primary Debtor	ID	Add'l ID	Letter ID	Continuou:	Levy Amount	Levy Proceeds	Issued Dat	Due Date	Changed

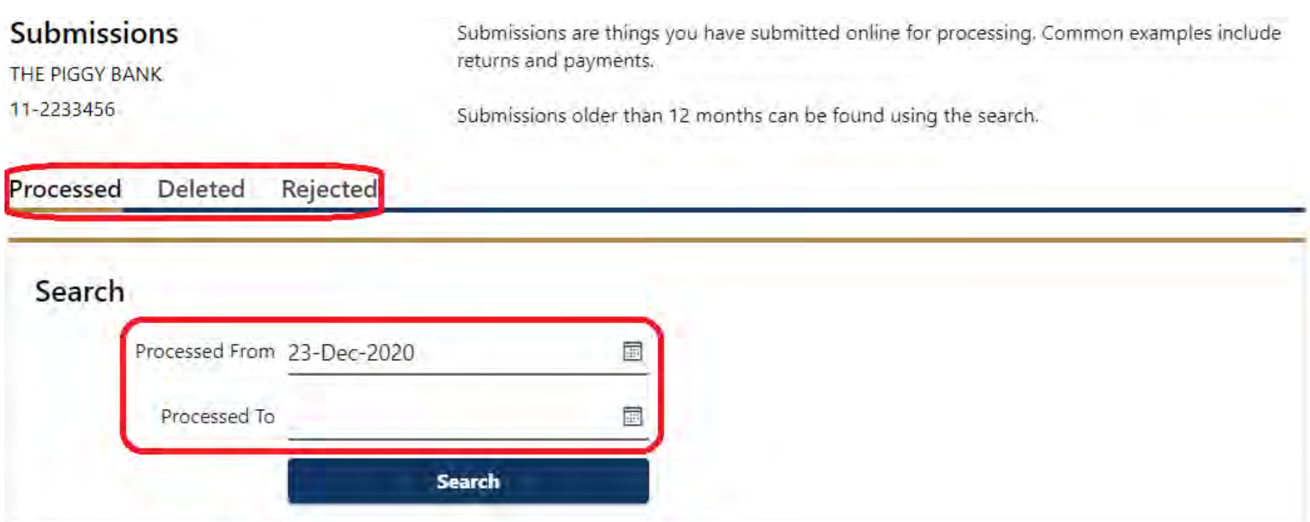
Viewing and Changing Submissions

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.

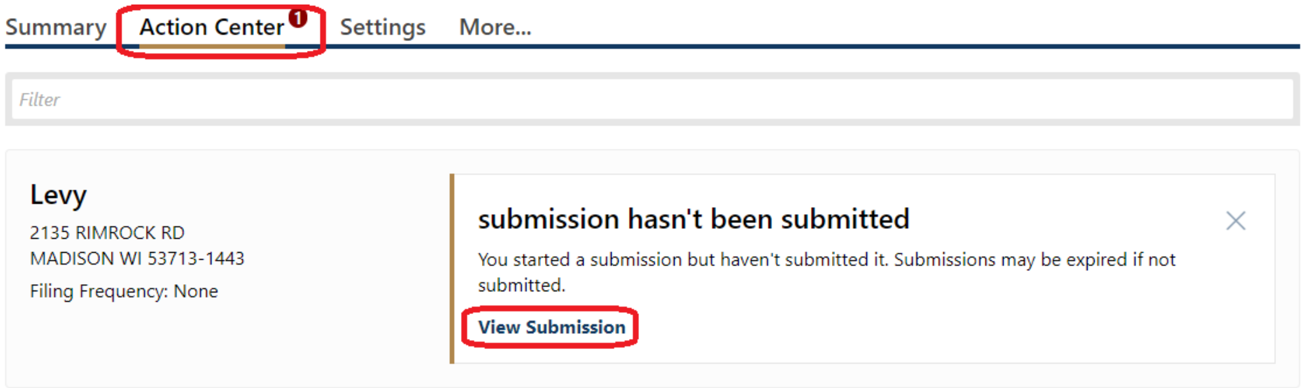


The default view is **Processed** submissions. You may also view **Deleted** or **Rejected** submissions by choosing the appropriate option. You may also change the date range.



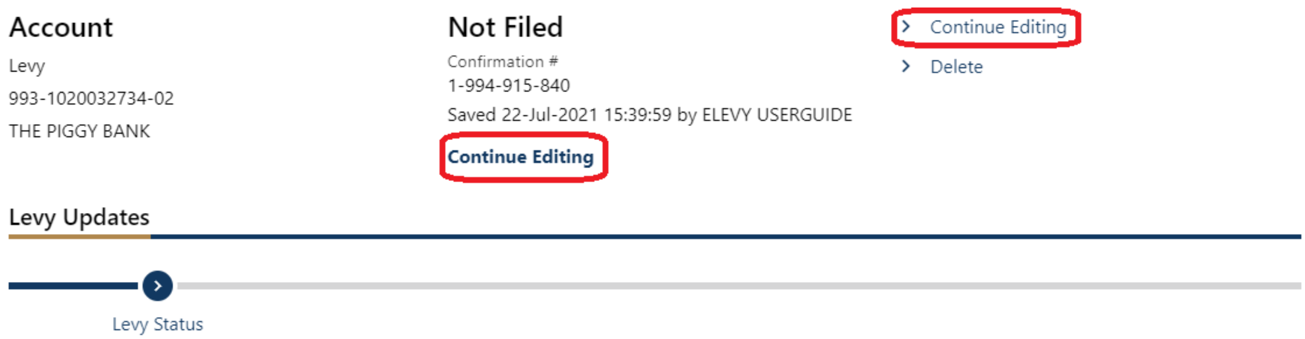
Additional tabs may be available if you have **Draft** or **Pending** submissions.

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**.



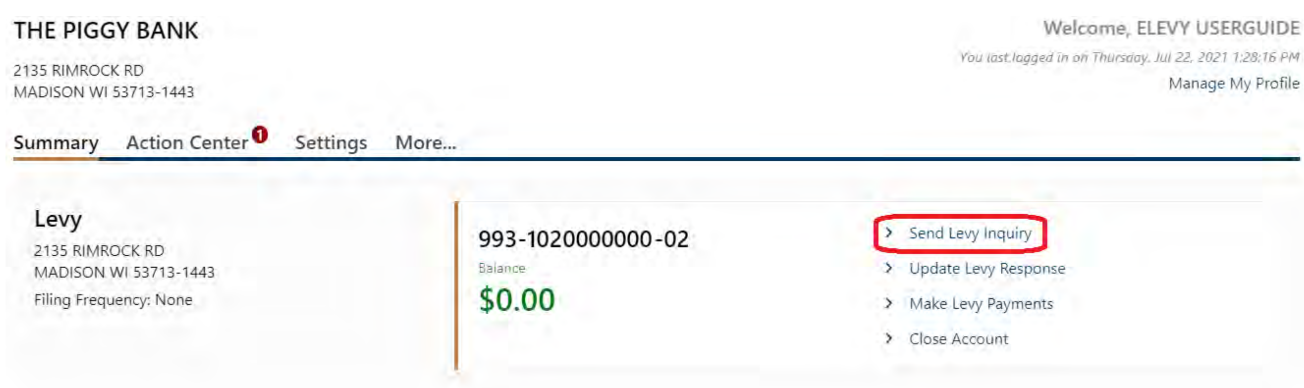
This will reopen the request so you may make the appropriate changes. Once you have made changes, click **Submit** at the bottom.

You may also choose **Delete** to delete the request instead.

Submitting an Inquiry

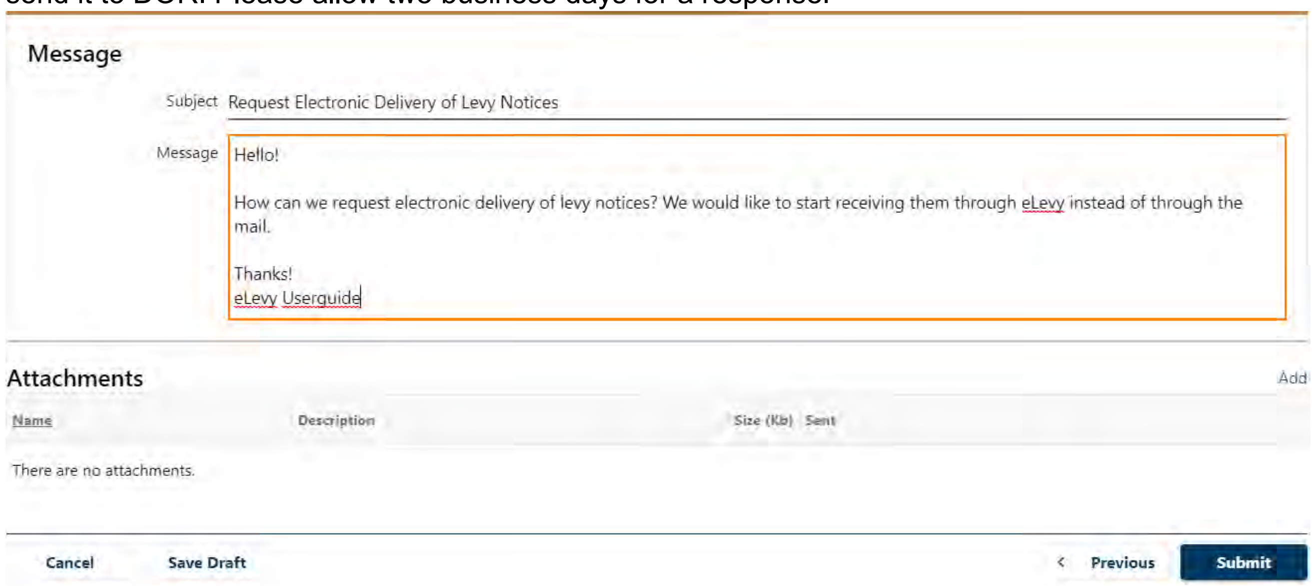
Levy Inquiry is a tool that allows you to communicate with department staff safely and securely. Similar to email, you enter a subject line and comments in a text box, then submit. If you have questions related to a specific levy, you may include details such as a complete SSN and name, and know the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

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

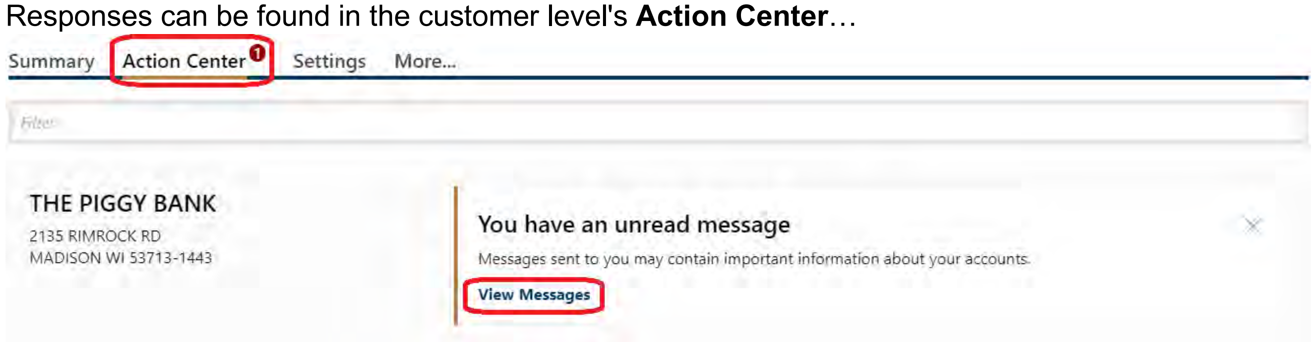


3. Most often your request will be related to a levy issued to your business. Choose your business from the list, then click **Next**.

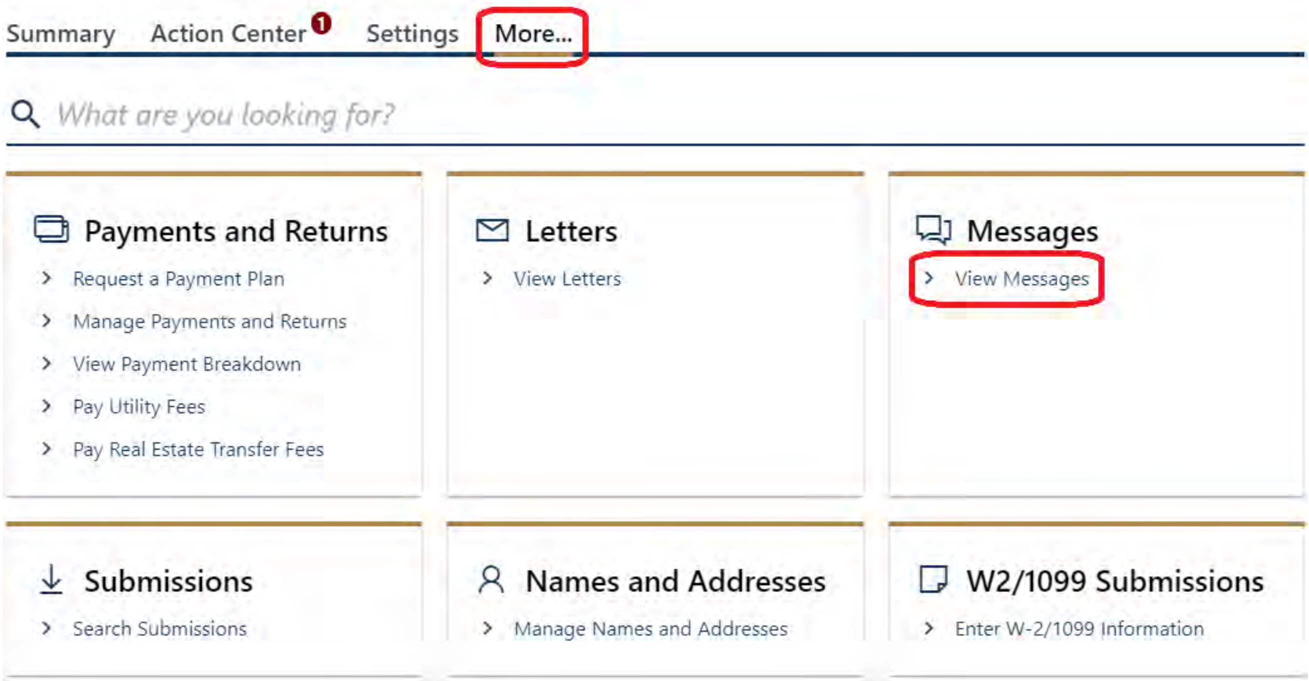
4. Compose your message as you would an email. You may also include attachments. Click **Submit** to send it to DOR. Please allow two business days for a response.



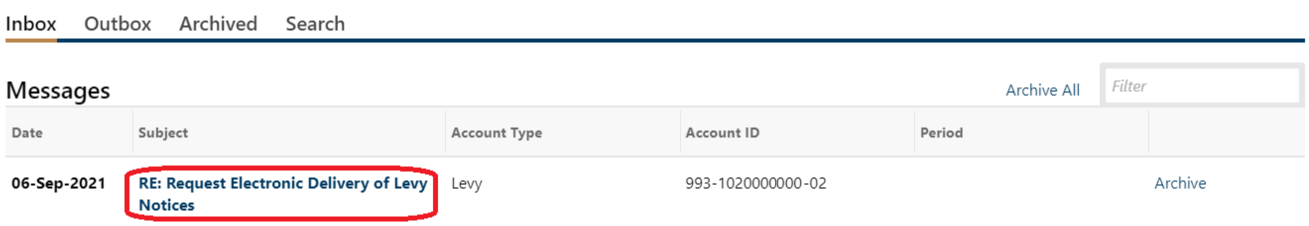
5. Responses can be found in the customer level's **Action Center**…



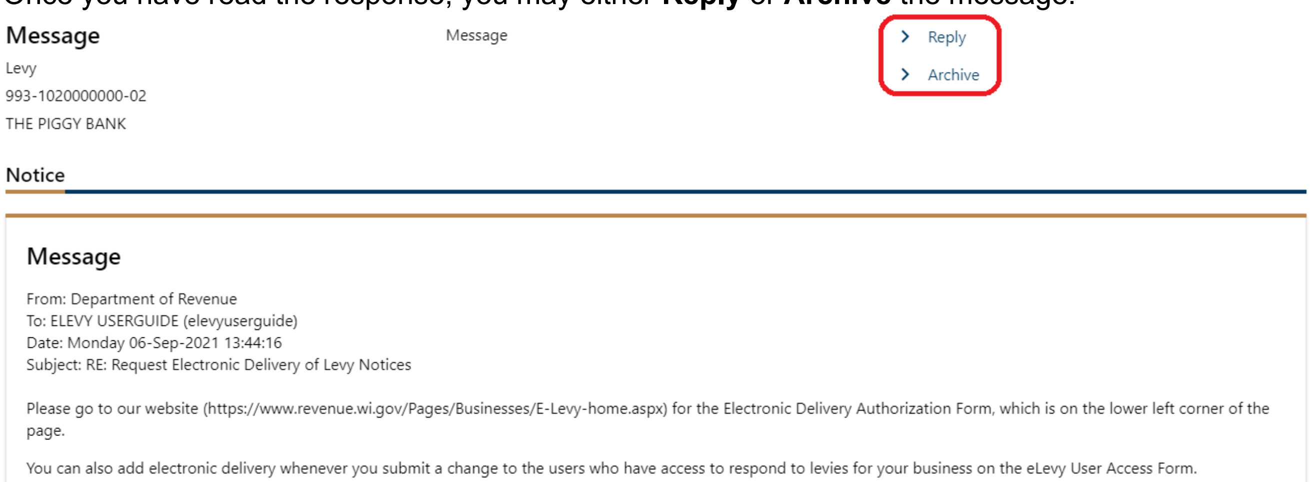
…or under **More…** and **View Messages**.



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.



Electronic Delivery of Levy Correspondence

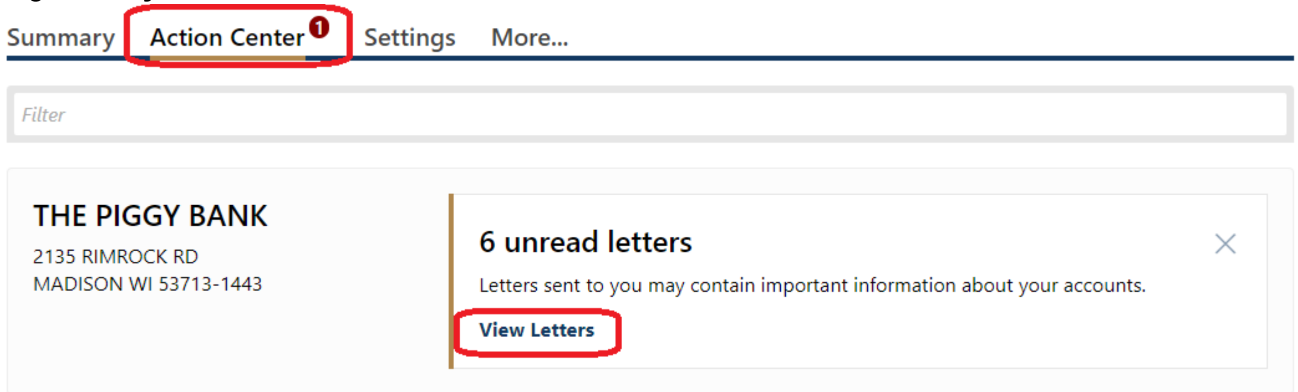
We offer the option to receive all levy correspondence electronically through My Tax Account. With electronic delivery, new levy letters are uploaded as PDF files each night instead of coming to you by postal mail. An email is sent to alert you to review new levies or changes to levy orders.

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

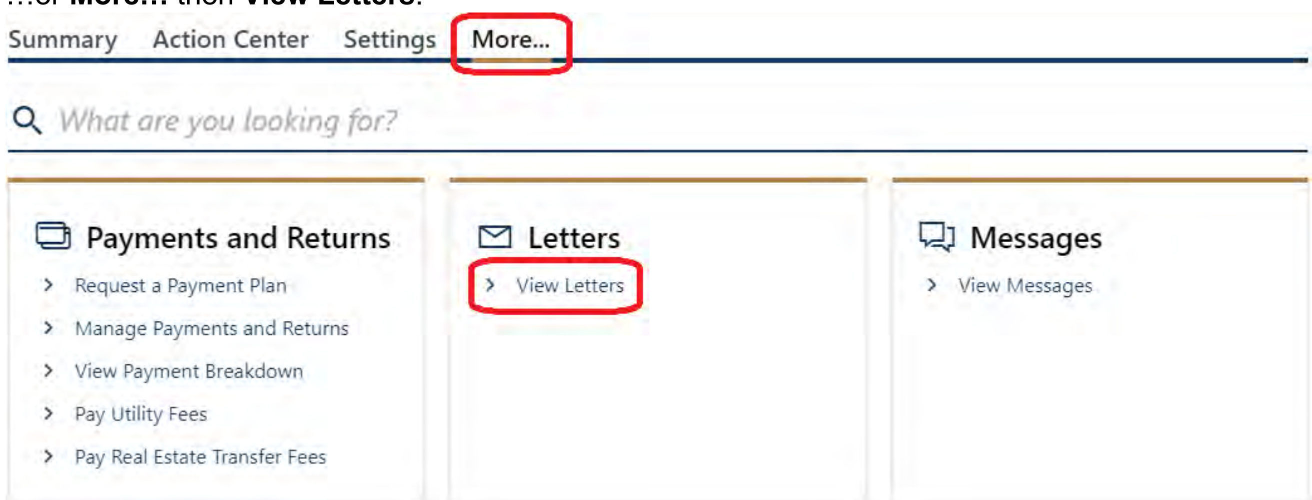
NOTE: Users cannot elect to receive levy notices electronically through My Tax Account. Please contact us if you would like to receive levy notices electronically.

To view new levy mail in **My Tax Account**:

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

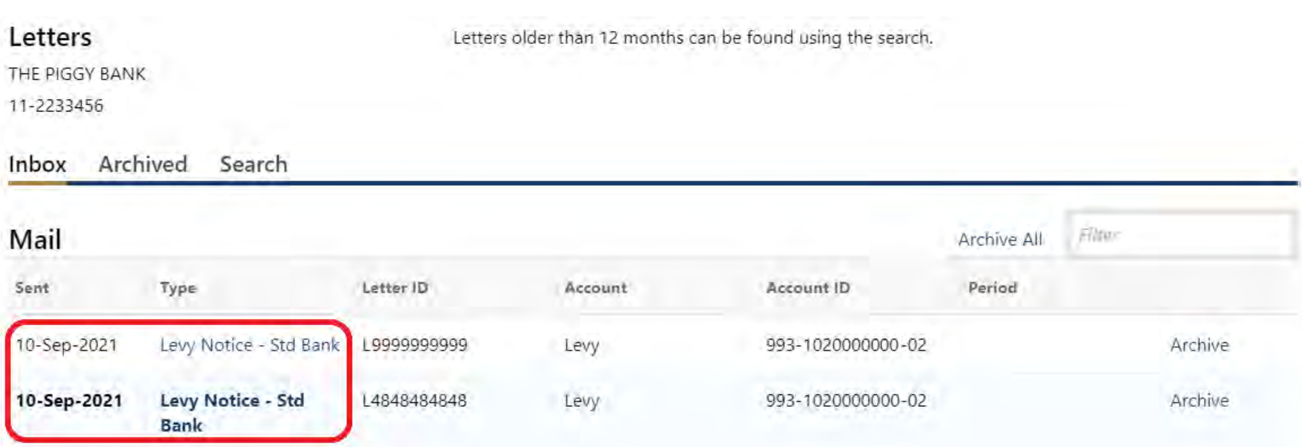


2. …or **More…** then **View Letters**.

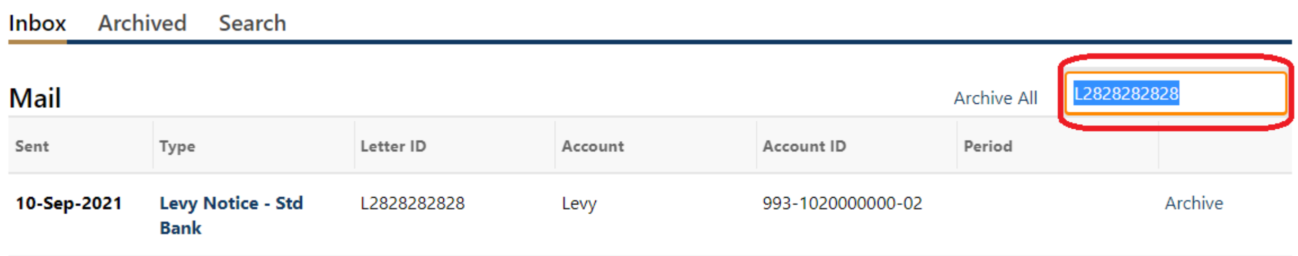


3. Unread letters will be in bold. Read letters will not. Click on the letter type to open a specific letter.

   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.



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