

#### MyDORGov Webinar - New Users Overview

WI Dept of Revenue, State and Local Finance Division May 11, 2022 | 10-11 a.m. (cst)

#### Webinar Information

- To ask a question, use the panel
- Enter a question
- Your response will be in the display section
- All Q&A and the recorded webinar will be posted on our website within a week



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#### Presenters

- Deb Werner-Kelln − Auditor
- Kristin Filipiak Community Services Specialist

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## Topics of Discussion

- Getting started, accessing and navigating the system
- Updating your contact information
- Managing your own access
- Managing others to file on your behalf
- Q&A
- Resources



# Accessing MyDORGov

### MyDORGov



- DOR's e-filing system for local government officials and other representatives
- E-file your required DOR forms or view previously filed forms and notifications

- Manage your access

# Accessing MyDORGov

- MyDORGov icon is on top of these landing pages:
  - Governments
  - o Town, villages and cities
  - Counties
  - School/technical colleges/ special districts
  - TIF information



#### My DOR Government Account (MyDORGov)

DOR's online filing system for local governments.

#### MyDORGov benefits, include:

- · Access to forms is specific to your role
- · View previously filed forms and DOR notifications
- Easy to manage multiple forms and districts/companies

#### Login | Help

#### **Online Services**

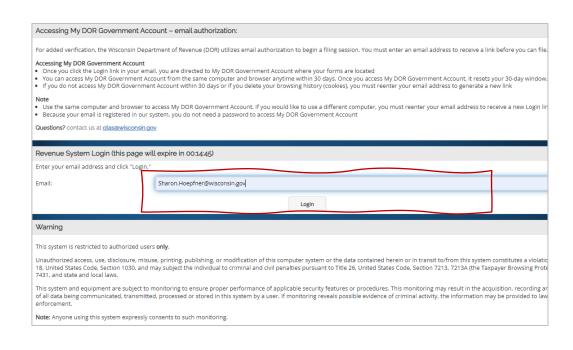


Login | Help

DOR's online filing system for local governments.

## Accessing MyDORGov

- Access to the system is effective for 30 days
- If you access the system from a different computer, you'll be prompted to complete the email authorization process again
- Enter your email address and click 'Login'



#### Email Link



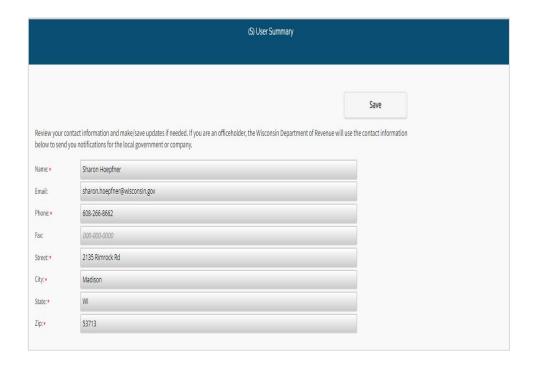
- ➤ You'll receive an email with a link to access MyDORGov
  - Link will take you to the MyDORGov home page
- ▶ Troubleshooting
  - Check your junk or spam folders for the email
  - Add a spam exception for @wisconsin.gov
  - Try using a different browser
  - If you want to access the system using Chrome, but the email with the link is in Microsoft Outlook, copy and paste the link into Chrome rather than just clicking the link



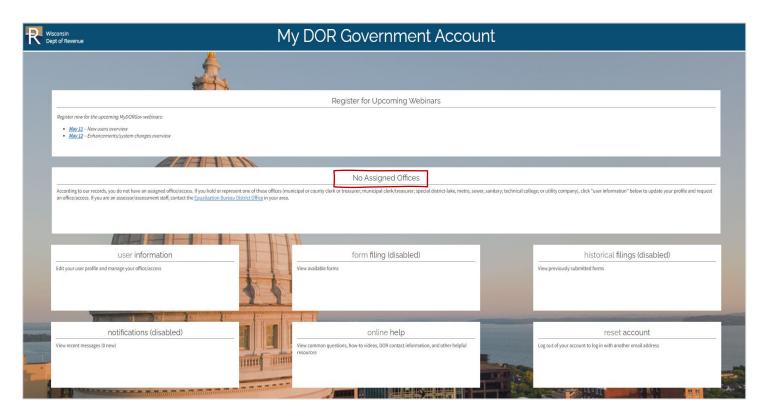
# MyDORGov Home Page

### Home Page – User Summary

- Window appears if this is the first time you log into MyDORGov; verify information once a year thereafter
- Enter your information to create your user profile and save
- This takes you to the home page showing 'No assigned offices'



## Home Page – No Assigned Offices



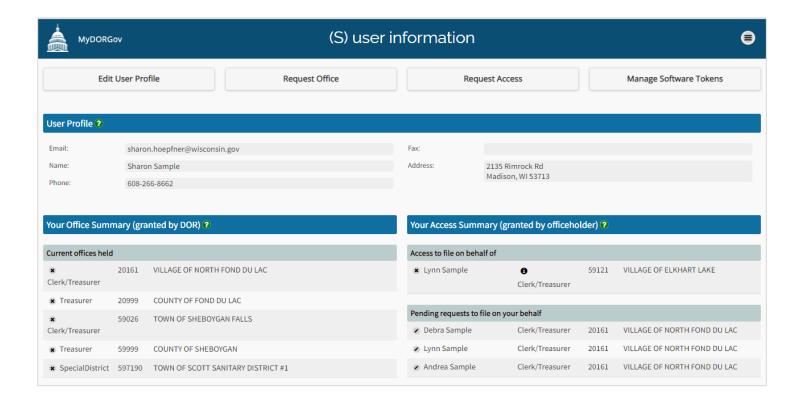
## Home Page – Assigned Offices



# User Information Page

And System Navigation

#### User Information



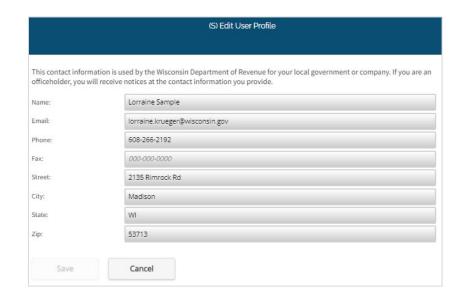
#### User Information



- Edit user profile update your contact information
- > Your office summary shows the offices you hold
- Your access summary − shows the users who can file on your behalf and the officeholders you can file on behalf of
- Request an office or access
- Manage software tokens (this option is for assessors only)
- Note: It's important to verify your profile information and accesses are correct

#### Edit User Profile

- You can update name, phone and fax number, and address
- Contact lgs@wisconsin.gov to:
  - Update your email address
  - Consolidate multiple profiles
  - Create a secondary email address
  - Disable or deactivate a user's profile
- Assessors
  - Update email in eRetr-Manage Users; assessment staff, contact assessor to update your access
  - Contact <u>otas@wisconsin.gov</u> to update your user profile; Note: Assessors can't have a secondary email address



### Your Office Summary

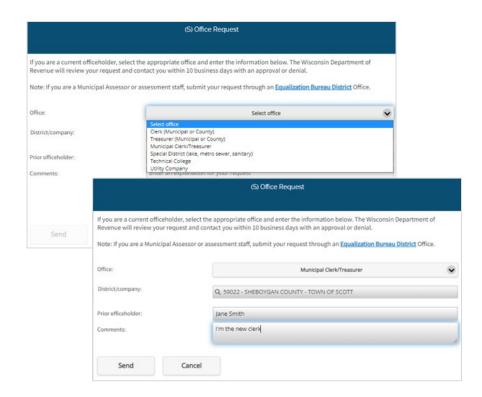
- Only the actual officeholder can request to hold an office
  - Clerk (municipal or county)
  - Treasurer (municipal or county)
  - Municipal Clerk/Treasurer
  - Special District Representative
  - Technical College Representative
  - Utility Company Representative

Your Office Summary (granted by DOR)   Current offices held		
★ Treasurer	20999	COUNTY OF FOND DU LAC
<b>★</b> Clerk/Treasurer	59026	TOWN OF SHEBOYGAN FALLS
<b>★</b> Treasurer	59999	COUNTY OF SHEBOYGAN
<b>★</b> SpecialDistrict	597190	TOWN OF SCOTT SANITARY DISTRICT #1

- - Click (x) you are asked to confirm the office removal
  - Email sent to DOR to process your request
  - o Office moved to 'Pending Office Removals' until DOR removes the office

### Request Office

- DOR grants office permissions
  - DOR will review your request and approve/deny within 10 business days
- Request office enter or select appropriate information
- DOR sends an email notifying you of its decision
  - If approved, log into
     MyDORGov and begin filing
  - If denied, use the contact information in the email to follow-up



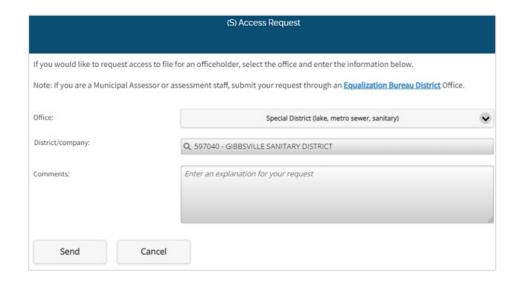
### Your Access Summary

- Access permissions are granted by the officeholder
- Possible sections under this panel
  - Access to file on behalf of lists offices (or other users) you are authorized to file on behalf of
  - Others authorized to file on your behalf
     for officeholders only and shows the
     users authorized to file on their behalf
  - Pending requests to file on your behalf or on behalf of an officeholder
- In each section, lists are sorted by district code



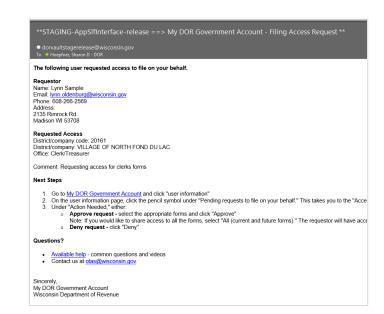
### Request Access

- Click 'Request Access' on the user information page
- Use if you aren't an officeholder, but need to file on their behalf
  - Example: deputy roles, staff roles in a municipal or county office, other representatives filing on behalf of a district/company officeholder (such as a CPA)
- Enter or select appropriate information



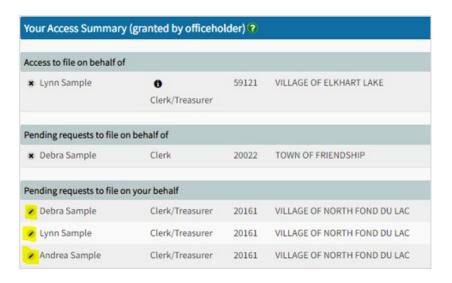
#### Request Access

- Email is sent to the officeholder to process your request
- Your request shows under 'Pending Access to file on behalf of'
  - You will receive an email with the decision
  - If approved, login to MyDORGov to being filing
  - District/office will now be available on your access summary – 'Access to file on behalf of'
- ▶ If you're granted access to file specific forms, but you need to change or add to the list
  - Contact the officeholder directly
  - Officeholder can modify your access



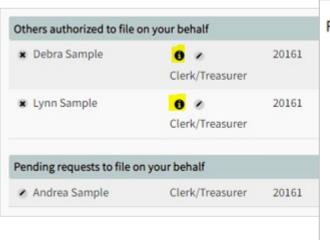
## Review Pending Requests

- Officeholders can approve or deny access requests
- > To process a request
  - Click the 'Pencil' icon
  - Review the requester information
  - Options:
    - Deny the request by clicking deny at the bottom
    - Approve the request by selecting all forms or selecting specific forms
- Approved requester now appears under the 'Others authorized to file on your behalf' section of 'Your Access Summary'



## Reviewing Access

Click info icon – to view the forms a user can file on your behalf

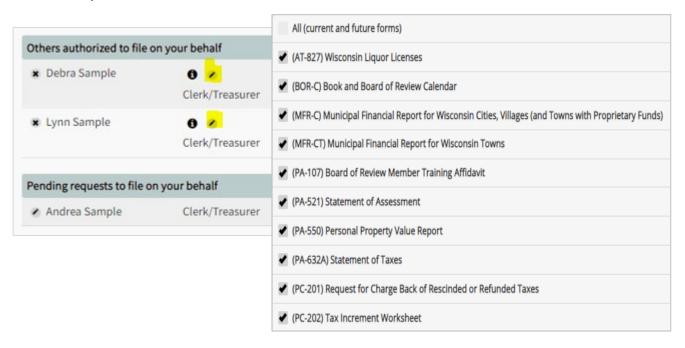


#### Forms you can access:

- PA-521 Statement of Assessment
- PA-550 Personal Property Value Report
- PA-632A Statement of Taxes
- PC-201 Request for Charge Back of Rescinded or Refunded Taxes
- PC-202 Tax Increment Worksheet
- PC-205 Request for Sharing of Non-Manufacturing Omitted Property Taxes
- PC-226 Taxation District Exemption Summary Report

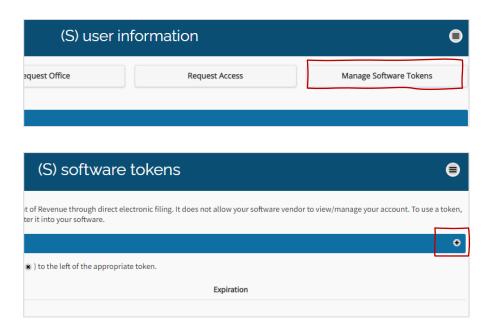
# Changing/Removing Access

#### Click pencil icon – to add/delete forms



### Manage Software Tokens

- Only assessors can access (button grayed out for other users)
- Provide token to your software vendor for direct electronic filing through your CAMA system; acts as an authorization code to provide filing access
- Doesn't allow your software vendor to view/manage your account
- Click (+) to create token; enter a name and click 'Create'
- Click (x) to delete token

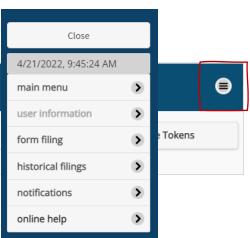


## System Navigation

#### Menu and capitol icon

- - o Return to main menu (home page), or go to other pages (your current page is grayed out)
  - Make a selection or close the menu
- Click capitol icon to return to home page

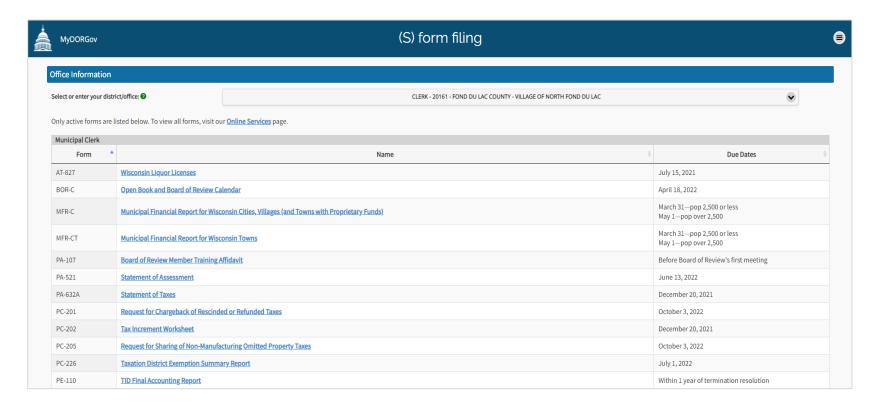




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# Form Filing Page

### Form Filing



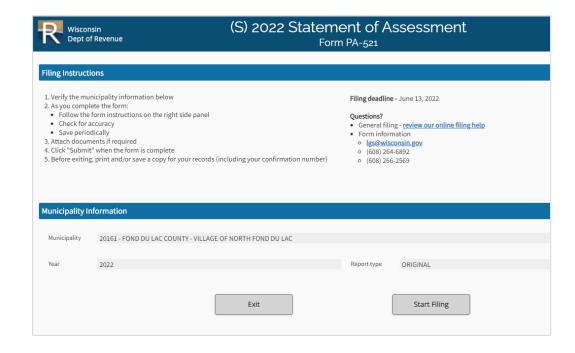
### Form Filing



- Lists your active forms with due dates
- Online Services all local government forms listed with filing reminders
- ▷ Dropdown menu lists your districts/offices
- > Forms table
  - Sorted by form number
  - Use arrows to re-sort columns by form number, name or due date
- Exiting a form without submitting it returns you to the form filing page
- Submitting a form returns you to the MyDORGov home page

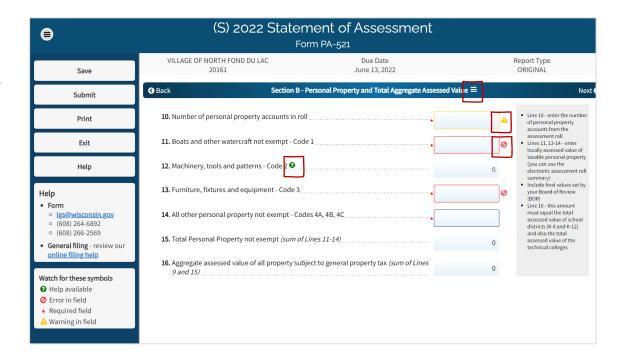
# Submitting a Form

- First page of each form looks similar
  - Includes filing instructions and may also have a link to detailed instructions
  - Contact information for form-specific questions
- When you're ready, select 'Start Filing' to begin



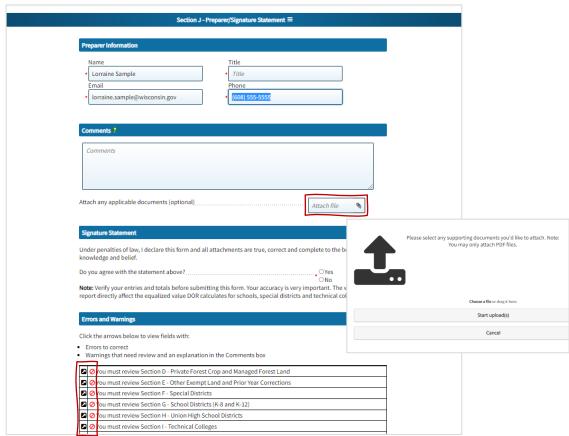
#### Within Form

- > All secondary pages
  - Left blue panel
    - Save, submit, print or exit form
    - Form help
    - General filing help
    - Symbol legend
  - Right gray panel –
     additional instructions
  - Section header menu
  - Help bubbles throughout form
  - Error and warning messages appear



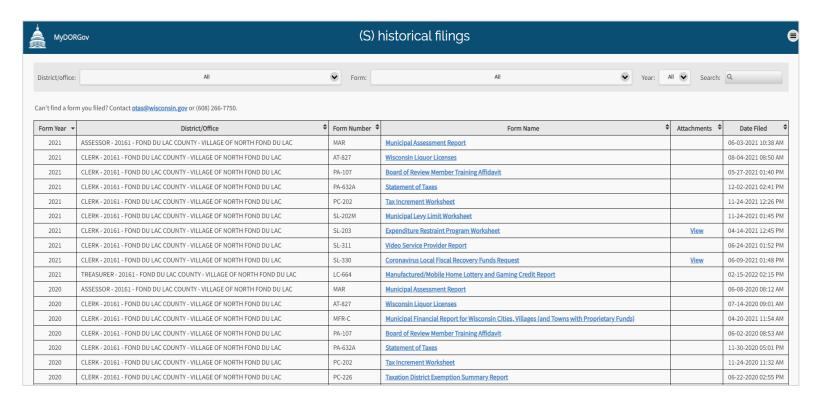
#### Within Form

- Preparer/Signature page
  - Attach files
  - Click arrows to see/fix error and warning messages



# Historical Filings Page

### Historical Filings



### Historical Filings



- Review and print forms filed in the past three years
- ▷ Clerks and treasurers have access to view forms their municipality/county filed
- ▷ If you file on an officeholder's behalf, you can only see the forms you have access to
- Dropdown menus default 'All'
- You can filter by:
  - Your district or office
  - Form number and name
  - Filing year
  - Entering a keyword in the 'Search'
- Click column arrows to sort

# Historical Filings

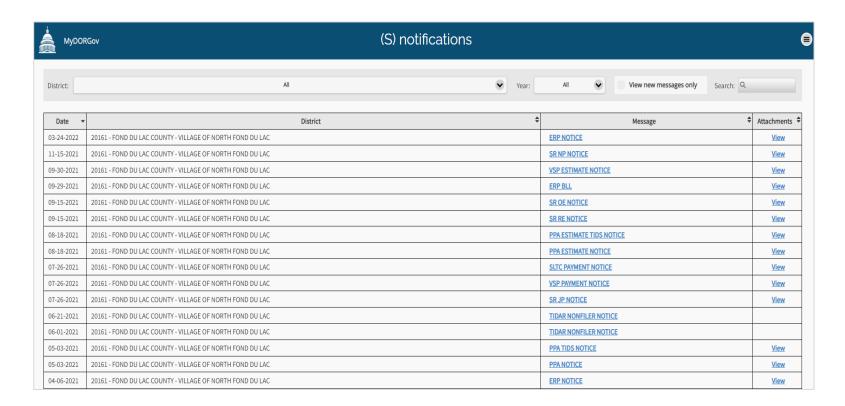


- View PDF of filed form − click form name link
  - Browser must allow pop-ups from the DOR website
  - Form opens in a new tab
  - o Download, print, or save
- Attachments you'll see 'View' in the Attachments column
  - Click link to see attachments (PDFs)
  - Dialog box opens multiple attachments are listed individually
  - Click link to open the attachment opens in a new tab
  - Download, print or save

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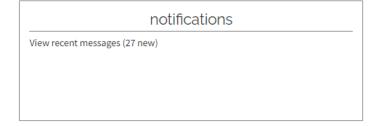
# Notifications Page

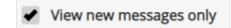
## Notifications



# Notifications

- Important notices and reminders from DOR
- Box on the home page shows how many new messages since your last visit
- Messages specific to your role for the past three years
  - If you only have access to file on behalf of an officeholder, you won't see the notices the officeholder received
- Dropdown menus default 'All'
  - Filter by district or year
  - Search by keyword
- Check 'View new messages only' to see new messages since your last visit to the page





## Notifications



- Click column arrows to sort
- Click link in the message column to view − a dialog box opens with the message
- - A new dialog box opens
  - Click link to open the attachment opens in a new tab
  - Download, print or save

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# Online Help

# Online Help

### State and Local Finance - Online Filing Help

Below is some helpful information for local government officials that must file information with the State and Local Finance Division (SLF) – primarily using My DOR Government Account.

### Filing/System Help

- · My DOR Government Account:
  - · Register now for the upcoming MyDORGov webinars:
    - May 11 New users overview
    - <u>May 12</u> Enhancements and system changes overview
  - Common questions
  - Helpful videos
- File transfer <u>instructions</u>
- Other forms under 'Government'

### Resources

- Online Filing Reminders view all forms and download form filing reminders
- · Stay informed
  - o Subscribe to DOR E-news to receive updates from SLF
  - Review recent and prior year news for <u>Municipal and County</u> <u>Officials</u> and <u>Assessors</u>
- Be prepared review the 
   2022 Local Government Calendar
- · Additional local government resources

#### Contact Us

#### **Municipal and County Officials**

- · Contact lgs@wisconsin.gov
  - Update incorrect email address within MyDORGov
  - Form specific questions
- System help contact otas@wisconsin.gov

#### Assessors and Assessment Staff

- · Update incorrect email address within MyDORGov
- · Add or remove a municipality within MyDORGov
- Contact
  - Assessor 🖾 DOR's Equalization Bureau
  - Assessment staff ask the assessor you are listed under to update your email in the Manage Users system
- System help contact otas@wisconsin.gov

# Online Help



- Dens a web page on a new tab
- Contact Us − lists contacts based on user type
- Resources
  - Download filing reminders
  - Subscribe to DOR E-News receive emails for due dates, payment dates, law changes, etc.
  - Recent/past news for municipal and county officials, and assessors
  - o 2022 local government calendar

# Reset Account

# Reset Account





### My DOR Government Account Reset

Your login to My DOR Government Account has been reset. To authorize the correct email address, click the MyDORGov icon, enter the email address and click "Login."

Note: This reset does not affect your existing user information.

## Reset Account



- Uncommon only use if you need to sign out and log in with another email address
- Example: you use different email addresses because you have multiple officeholder positions
- Pop-up window asks if you are sure you want to log out of your account
- ▷ Selecting 'Yes' logs you out of MyDORGov with your current email address
- Click the MyDORGov icon to login with a different email address
- ➤ You'll receive a new link by email to access the system

# Resources

## Resources



- □ Using MyDORGov revenue.wi.gov/Pages/FAQS/slf-vault.aspx
  - Common questions
  - Videos
- DOR training page revenue.wi.gov/Pages/Training/Home.aspx
  - Recorded version of this webinar posted within a week
  - Q&A from this webinar as a PDF

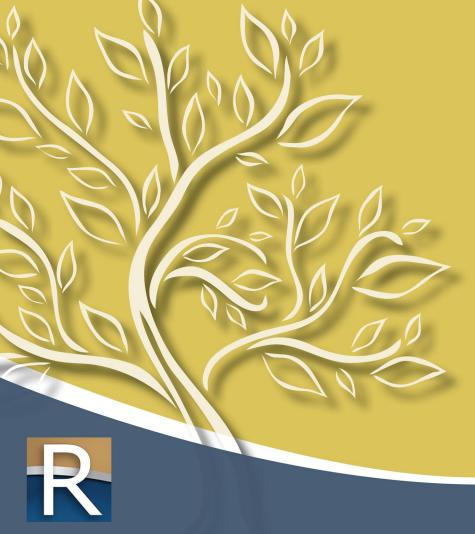
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# Thanks!

Any questions?



slf@wisconsin.gov



## **Mission**

Strengthen Wisconsin through fair tax and lottery administration, while educating and serving the public, our customers and communities.

### **Vision**

To be the premier agency in providing innovative, accessible resources, and exceptional customer service built on a foundation of trust, inclusivity and creativity.

## **Values**

- Integrity
- Innovation
- Inclusivity

- Knowledge
- Empathy
- Security