



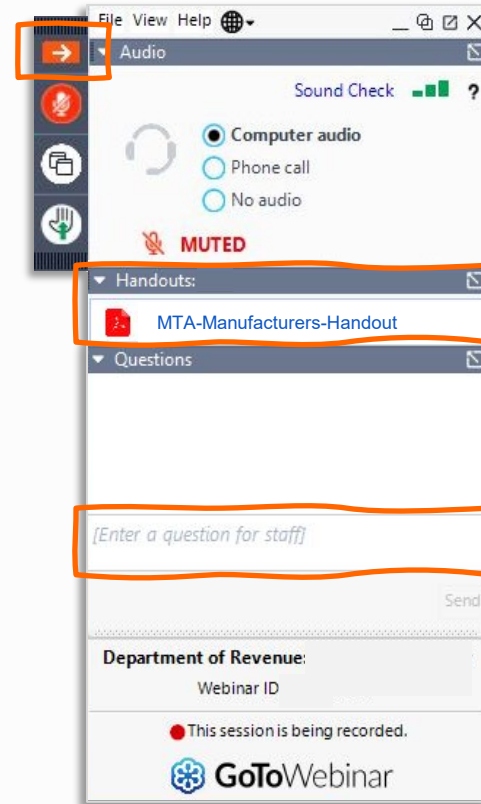
# My Tax Account Webinar

Annual Refresher for Manufacturers

WI Dept of Revenue | State and Local Finance Division  
January 23, 2025 | 10-11 a.m.

# Webinar Information

- ▷ Download today's presentation from the Handouts section
- ▷ To ask a question – type in the 'Enter a question for staff' area
- ▷ We'll respond to your question during the webinar
- ▷ All Q&A and the recorded webinar will be posted on our website within a week



# Presenters

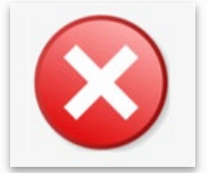
- ▷ David Benish – Property Assessment Specialist
- ▷ Leland Froelke – Property Assessment Supervisor
- ▷ Valerie Thompson – IS Business Automation Senior
- ▷ Dilin Fennell – Property Assessment Supervisor
- ▷ Ava Windsor – Property Assessment Specialist
- ▷ Debbie Crowell – Property Assessment Specialist

# Discussion Topics



- ▷ My Tax Account registration and login
- ▷ General navigation and profile information
- ▷ Requests and notices
- ▷ E-filing an M-R form
- ▷ Additional MTA functionality
- ▷ Q&A

# Reminders



- ▷ We're working in a training environment
- ▷ My Tax Account (MTA) is a live environment
- ▷ Don't submit any returns or requests you complete during this webinar
- ▷ Screens may appear differently in the MTA live environment
- ▷ Contact Customer Service – (608) 261-5338
  - If you accidentally submit a return

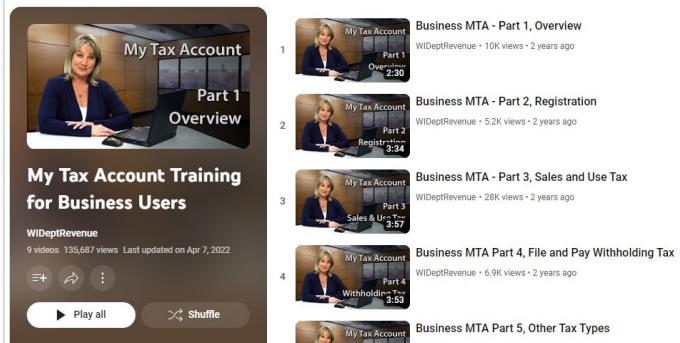
# Registration and Login

My Tax Account



# MTA Home Page

- ▶ Access training videos
  - Resources panel
  - Select "business videos"
- ▶ General to specific



**My Tax Account Training for Business Users**  
9 Videos | 135,567 views | Last updated on Apr 7, 2022

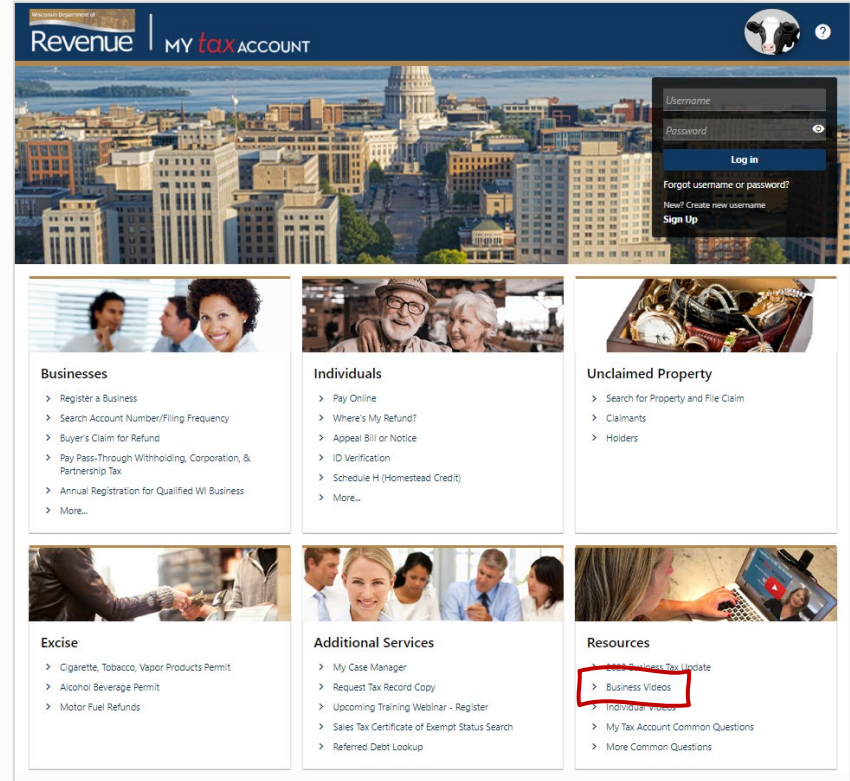
**Business MTA - Part 1, Overview**  
WIDeptRevenue • 10K views • 2 years ago

**Business MTA - Part 2, Registration**  
WIDeptRevenue • 5.2K views • 2 years ago

**Business MTA - Part 3, Sales and Use Tax**  
WIDeptRevenue • 28K views • 2 years ago

**Business MTA Part 4, File and Pay Withholding Tax**  
WIDeptRevenue • 6.9K views • 2 years ago

**Business MTA Part 5, Other Tax Types**



**Revenue | MY tax ACCOUNT**

**Username**  
**Password**  
**Log in**  
Forgot username or password?  
New? Create new username  
**Sign Up**

**Businesses**

- > Register a Business
- > Search Account Number/Filing Frequency
- > Buyer's Claim for Refund
- > Pay Pass-Through Withholding, Corporation, & Partnership Tax
- > Annual Registration for Qualified WI Business
- > More...

**Individuals**

- > Pay Online
- > Where's My Refund?
- > Appeal Bill or Notice
- > ID Verification
- > Schedule H (Homestead Credit)
- > More...

**Unclaimed Property**

- > Search for Property and File Claim
- > Claimants
- > Holders

**Excise**

- > Cigarette, Tobacco, Vapor Products Permit
- > Alcohol Beverage Permit
- > Motor Fuel Refunds

**Additional Services**

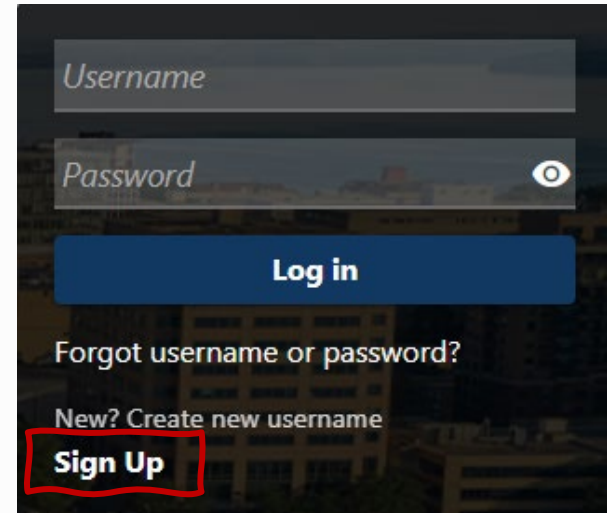
- > My Case Manager
- > Request Tax Record Copy
- > Upcoming Training Webinar - Register
- > Sales Tax Certificate of Exempt Status Search
- > Referred Debt Lookup

**Resources**

- > 2022 Wisconsin Tax Update
- > **Business Videos**
- > Individual Videos
- > My Tax Account Common Questions
- > More Common Questions

# Register as a New User

- ▷ Click "Sign Up"
- ▷ Below "New? Create new username"
- ▷ Follow registration steps



Username

Password

Log in

Forgot username or password?

New? Create new username

**Sign Up**



# Register as a New User

## First Step

- ▷ Enter profile information
  - Review username and password requirements
  - If you don't meet the requirement – you'll receive an error message
- ▷ Take note of – and store in a safe place
  - Email
  - Username
  - Password
  - Secret question and answer

## Enter Profile Information

Username <sup>\*</sup> *Required*

Your username must be between 5-20 characters and begin with an alphanumeric character.

Password <sup>\*</sup> *Required*

Passwords cannot be reused

Confirm Password <sup>\*</sup> *Required*

Minimum 8 characters

Passwords must contain both letters and numbers

Passwords must contain both uppercase and lowercase letters

Passwords must contain at least one special character

Secret Question <sup>\*</sup> *Required*Secret Answer <sup>\*</sup> *Required*Confirm Secret Answer <sup>\*</sup> *Required*Profile Email Address <sup>\*</sup> *Required*

Your email address must be in a standard format and must not include the characters of "!" or "%". An acceptable email address format example: johndoe@business.com.

Confirm Email Address <sup>\*</sup> *Required*First and Last Name <sup>\*</sup> *Required*

Phone Country USA

Phone Type <sup>\*</sup> *Required*Phone Number <sup>\*</sup> *Required*

Are You a Third Party Preparer?

No

Yes

Find Saved Request

Cancel

Save Draft

&lt; Previous

Next &gt;

# Register as a New User

## Second Step

- ▷ Enter customer information
  - Identification number (i.e., federal employer identification number or Wisconsin tax number (WTN))
  - Legal name
  - Zip code associated with mailing address DOR has on file for your business
- ▷ Sole proprietor – use
  - Social security number
  - Personal name
- ▷ WTN – located in top-right of greeting letter

## New Registration



Logon Information



Customer Information

### 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 \*

*Required* 

ID \*

*Required*

Customer Last or Business Name \*

*Required*

Customer Zip Code \*

*Required*

Find Saved Request

Cancel

Save Draft

< Previous

Next >

# Register as a New User

## Third Step

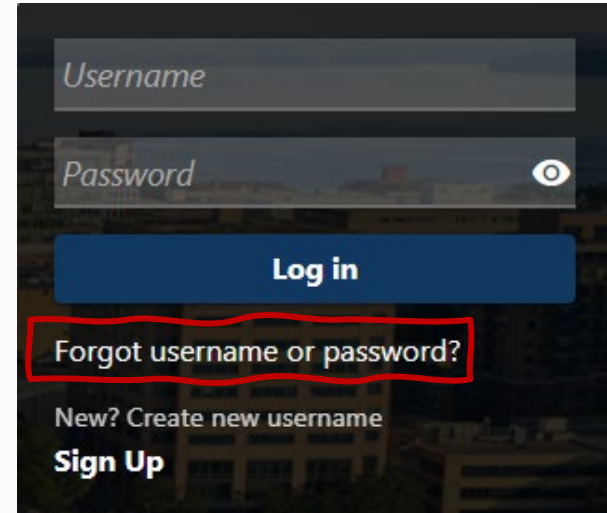
- ▷ Answer the question "Are you an active business customer?"
- ▷ Click "Next"

## Fourth (and final) Step – Account Access

- ▷ Select account in the Tax Account Type drop-down
- ▷ Enter required information
  - Last nine digits of PARID number
  - Total Y-R balance from prior return – for tax year 2023
  - Letter ID – from the top right corner of the greeting letter you received in the mail

# MTA Login

- ▶ Login issues – reset password or have your username emailed to you
- ▶ Click "Forgot Username or Password" link
- ▶ Enter username and password to login

A screenshot of the MTA login interface. It features a dark background with a cityscape. At the top, there are two input fields: 'Username' and 'Password'. The 'Password' field has a toggle icon (an eye) to its right. Below these fields is a blue 'Log in' button. Underneath the button is a link that says 'Forgot username or password?' which is highlighted with a red rectangular border. At the bottom, there is text that says 'New? Create new username' followed by a 'Sign Up' button.

Username

Password

**Log in**

**[Forgot username or password?](#)**

New? Create new username

**Sign Up**

# MTA Login – First Time Logging In

- ▷ Don't wait to login – register before March 3, 2025
  - Allows time to resolve any issues before filing a return
- ▷ Add [MTAsupport@wisconsin.gov](mailto:MTAsupport@wisconsin.gov) as a trusted email address
  - Your security settings may prevent or delay receiving the security code by email
- ▷ Set up a delivery method for your security code
  - Text – default
  - Email – click "More Security Code Delivery Options"
  - Authenticator app
- ▷ Check box to "Trust this device"
  - In the future – you won't have to enter a security code on your device

# *General Navigation* and Profile Information

My Tax Account



# General Navigation

- ▷ Favorites tab
- ▷ Summary tab
- ▷ Action Center tab
- ▷ Settings tab
- ▷ More...tab
  - Manage payments and returns
  - Request a payment plan and view payment breakdown
  - View or cancel scheduled payments
  - View letters and messages
  - Search submissions/Manage names and addresses

### Payments and Returns

- > Manage Payments and Returns
- > Request a Payment Plan
- > View Payment Breakdown
- > Pay Real Estate Transfer Fees
- > View or Cancel Scheduled Payments

### Letters

- > View Letters

### Messages

- > View Messages

### Submissions

- > Search Submissions

### W2/1099 Submissions

- > Enter W-2/1099 Information

### Names and Addresses

- > Manage Names and Addresses

# Manage My Profile

▷ Profile tab

**Welcome, Manufacturer**

*You last logged in on Friday, Dec 15, 2023 10:49:06 AM*

[Manage My Profile](#) **1**

## Security

Password

Last changed November 15

[Change Password](#)

Secret Question

What is the name of your first pet?

[Update Your Secret Question](#)

Two-Step Verification Settings

Codes are sent via text message and email

[Change Two-Step Settings](#)

# Requests and Notices

My Tax Account

# Action Center Tab – More...

- ▷ Manage Access
  - Manage My Access
  - Manage My User's Access
  - Manage Other User's Access
  - Manage Third Party Access
- ▷ Request Access
  - To an account
  - To a third-party account

## Request Additional Access





- > Request Access to an Account
- > Request Access to a Third Party Account

## Manage Access

- > Manage My Access
- > Manage My User's Access
- > Manage Other User's Access
- > Manage Third Party Access
- > Delete My Profile
- > Close Accounts

# Action Center Tab – More...

- ▷ Manage Payment Sources
- ▷ View Messages
- ▷ Search Submissions
- ▷ View Activity

 <b>Payment Sources</b> > Manage Payment Sources	 <b>Messages</b> > View Messages
 <b>Submissions</b> > Search Submissions	 <b>Logon Activity</b> > View Activity

### Request Additional Access

- > Request Access to an Account
- > Request Access to a Third Party Account

### Payment Sources

- > Manage Payment Sources

### Messages

- > View Messages

### Manage Access

- > Manage My Access
- > Manage My User's Access
- > Manage Other User's Access
- > Manage Third Party Access
- > Delete My Profile
- > Close Accounts

### Submissions

- > Search Submissions

### Logon Activity

- > View Activity

# Manufacturing Real Estate Accounts

- ▷ Choose your manufacturing account

Manufacturing Real Estate		24 Manufacturing Real Estate accounts	> View Accounts
<b>Manufacturing Real Estate</b> 123 MAIN ST BADGER WI 54321 Filing Frequency: Annual		237-1234567890-000 Balance \$0.00	<b>&gt; File/View Returns</b> > Record Sale

- ▷ Click "File/View Returns" to begin



# Manufacturing Real Estate Accounts

- ▷ Other options available:
- Appeal
  - Request Extension to File
  - View or Cancel Scheduled Payments

## Returns

Manufacturing Real Estate  
237-1234567890-000  
MANUFACTURING COMPANY LLC

Balance

**\$0.00**

- ▷ Appeal
- ▷ Request Extension to File
- ▷ View or Cancel Scheduled Payments

# E-filing an M-R Form

My Tax Account



# E-filing an M-R Form



- ▷ We're working in a training environment
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- ▷ Don't submit any returns or requests you complete during this webinar
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- ▷ Contact Customer Service – (608) 261-5338
  - If you accidentally submit a return

# E-filing an M-R Form

- ▶ Contact information screen – preparer information is pre-filled
- ▶ Fill in the required fields and click "Next"

**Preparer Information** ⋮ Staging

Name  
OTAS

Email  
otas@wisconsin.gov

Phone  
(608) 000-0000

**Manufacturer/Owner Contact Information**

Name \*

Email \*

Required Required

Phone Country

Phone Type

Phone Number

Ext.

USA

Business Phone

Cancel

Save Draft

< Previous

Next >

# E-filing an M-R Form

- ▶ Form instructions – downloads a pdf of the instructions
- ▶ "Save Draft" – use if you will leave the form for more than 15 minutes
- ▶ Will save your work up until that point

The screenshot shows the 'Form M-R' staging interface. At the top, there's a 'Form M-R' header and a 'Staging' tab. Below the header is a progress bar with a dropdown arrow. The main content area is divided into sections: 'Contact Information', 'Filling Tips', 'Preparer Information', and 'Manufacturer/Owner Contact Information'. The 'Filling Tips' section has a red box around the 'Form Instructions' link. The 'Preparer Information' section has fields for Name, Email, and Phone. The 'Manufacturer/Owner Contact Information' section has a question 'Do you need to update contact information?' with 'Yes' and 'No' buttons. Below this are fields for Name, Email, Phone Country, Phone Type, Phone Number, and Ext. The 'Save Draft' button at the bottom is also highlighted with a red box.

Form M-R Staging

Contact Information

Filling Tips Form Instructions

Preparer Information

Name

Email

Phone

Manufacturer/Owner Contact Information

Do you need to update contact information?

☒ Yes ☐ No

Name

OTAS TEAM

Email

otas@wi.gov

Phone Country

USA

Phone Type

Business Phone

Phone Number

(608) 000-0000

Ext.

Phone Country

USA

Phone Type

Fax - Business

Phone Number

Ext.

Cancel Save Draft Previous Next

# E-filing an M-R Form

## Schedule A

- ▷ List of questions that build your report
- ▷ Depending on your answer to the questions,
  - A schedule related to that question may be added to the report – or –
  - Immediate additional information is required

Schedule A	
Property Address	
201 N 1ST AVE 54401	
1. Is this property <b>Vacant or Non-operating</b> ? If "No", complete Schedule R-5. If "Yes", enter the date and reason vacancy began.	Date Reason
<input type="button" value="Yes"/> <input checked="" type="button" value="No"/>	
2a. During the last two years, was this property bought/sold?	Date Price
<input type="button" value="Yes"/> <input checked="" type="button" value="No"/>	0
2b. During the last two years, was this property listed/offered for sale?	Date Price
<input type="button" value="Yes"/> <input checked="" type="button" value="No"/>	0
4. Was this property appraised since January 1, 2023?	Date Price
<input type="button" value="Yes"/> <input checked="" type="button" value="No"/>	0
Purpose of Appraisal	
4a. Were there any changes to the parcels size or shape between January 1, 2023 - January 1, 2024?	
<input checked="" type="button" value="Yes"/> <input type="button" value="No"/>	
If "Yes" describe and complete Schedule Y-R, Part 1-"Land Size (acres or SF)", Col.3 or Col.4	
For webinar purposes only.	

# E-filing an M-R Form

4b. Were there any changes to new construction or construction in progress from previous years between January 1, 2024 - January 1, 2025? \*

If yes, complete Schedule R-1.

Yes	No
-----	----

4c. Was there any remodeling of any previously existing building between January 1, 2024 - January 1, 2025? \*

If yes, complete Schedule R-2.

Yes	No
-----	----

4d. Were there any demolitions or removal of building components between January 1, 2024 - January 1, 2025? \*

If yes, complete Schedule R-3.

Yes	No
-----	----

4e. Were there any changes to land improvements (ex. paving, fences, lighting, curbs) between January 1, 2024 - January 1, 2025? \*

If yes, complete Schedule R-4.

Yes	No
-----	----

4f. Were there any changes to waste treatment facilities between January 1, 2024 - January 1, 2025? \*

If yes, complete Schedule R-6.

Yes	No
-----	----

4g. Did someone, other than the land owner, own any buildings on this parcel (building on leased land) between January 1, 2024 - January 1, 2025? If yes, complete schedule R-7. \*

Yes	No
-----	----

# E-filing an M-R Form

## Schedule R-1

- ▷ Appears if 4(b) in Schedule A is "yes"
- ▷ If you have more than one structure under construction, you must complete a separate report for each structure
- ▷ Attach a building plan – required



## Sch. R-1 – Part 1

Enter description of construction

Part 1 - New Construction and Construction in Progress				
<b>Provide the following for the new construction:</b>				
Is new construction a free standing building or an addition to an existing structure?				
<i>Required</i>				
Was this construction in progress reported in a prior year?				
<table><tr><td>Yes</td><td>No</td></tr></table>			Yes	No
Yes	No			
Ground floor area Sq. Ft. (footprint)				
0				
Office Sq. Ft.				
0				
Foundation				
<table><tr><td>Yes</td><td>No</td></tr></table>			Yes	No
Yes	No			
Insulation				
<table><tr><td>Yes</td><td>No</td></tr></table>			Yes	No
Yes	No			
Framing				
<i>Required</i>				
Heating: Square foot of building area heated				
0				
Air Conditioning: Square foot of building area cooled				
0				
Fire Protection: Square foot of building area fire protected				
0				
<b>Finished Area:</b>				
Floor area of (finished) office space Sq. Ft.				
0				
Floor area of other finished areas Sq. Ft. (ex: computer rooms, R & D labs, lunchrooms)				
0				
Floor area of finished production space Sq. Ft. (ex: food preparation areas)				
0				
Miscellaneous - Identify any other significant building components not included above (ex: elevators, ramps, docks, special electrical service, additional foundations)				
Upper floor area Sq. Ft.		Building height Ft.		
0		0		
Majority use of upper floor area:				
<input type="checkbox"/> Office				
<input type="checkbox"/> Production				
<input type="checkbox"/> Storage				
Building dimensions:				
Length				
0				
Production Sq. Ft.				
0				
Basement				
<table><tr><td>Yes</td><td>No</td></tr></table>			Yes	No
Yes	No			
Plumbing				
<table><tr><td>Yes</td><td>No</td></tr></table>			Yes	No
Yes	No			
Exterior wall				
<i>Required</i>				
Power				
<i>Required</i>				

## Sch. R-1 – Part 2

# Enter construction costs

**Part 2 - New Construction and Construction in Progress Costs**

Contractor <sup>+</sup>  
*Required*

Name

1. Site preparation

2. Foundation, basement and superstructure

3. Electrical/lighting/power

4. Plumbing

5. Sprinkler system

6. HVAC

7. Finish - partitions; interior finish on floors, walls and ceilings

8. Start up costs(ex.Soft costs and architect fees)

9. Other costs

**Add Other Costs**

10. If costs include items, you feel may qualify as machinery and equipment used exclusively and directly in the manufacturing process (ex: special machine foundations, production power wiring or process piping), attach an explanation

11. **Total cost** of construction upon completion

12. **Percentage complete** on January 1, 2025 (use cost incurred, not cost paid, to calculate) <sup>+</sup>  
*Required*

13. **Total building cost** incurred before January 1, 2025

14. **Important** - deduct cost of construction reported last year

15. Net amount to be reported this year.

16. **Your estimate** of market value of construction as of January 1, 2025 <sup>+</sup>  
*Required*

Explain your opinion of the effective increase in value here or attach supporting documentation

**Cancel** **Add**

# E-filing an M-R Form

## Schedule R-2

- ▷ Appears if 4(c) in Schedule A is "yes"
- ▷ Enter the description, cost and estimated value of such things as
  - Roof repair/replacement
  - Building mechanical updates
  - Office remodel
  - Etc.

Sch. R-2

**Report:** Use this schedule to identify **changes to existing** structures for this parcel by the real property **owner and tenant**.

Items that may be classified as real estate	
Report any changes to these items on Schedule R-2 and Schedule R-4	
Boilers	Cranes and Craneways
Transformers	Doc levelers
Building electrical service	Railroad siding
Elevators	Truck scales
Building HVAC equipment	Tanks/Silos
Central air conditioning	
Refrigeration Equipment	
Plumbing piping and fixtures	
Sprinkler equipment	

	Description of Changes	Cost	Estimated Effective Increase in Value

<b>Total Cost</b>	0
Enter what you feel is the total effective value increase to the property as a result of these changes.	0

# E-filing an M-R Form

## Schedule R-3

- ▷ Appears if 4(d) in Schedule A is "yes"
- ▷ Demolitions – report building(s) or land improvement(s) removed or in progress

Sch. R-3

Report: Building or land improvements that were removed from this parcel by the real property owner or tenant.

	Description	Sq. Ft. Affected	Year Built	Original Cost	Cost to Raze

Total Cost

0

Total Cost to Raze

0

Enter what you feel is the total effective value change as a result of the demolition.

0

Cancel

Save Draft

< Previous

Next >

# E-filing an M-R Form

## Schedule R-4

- ▷ Appears if 4(e) in Schedule A is "yes"
- ▷ Enter the description, cost and estimates of land improvements – such as
  - Paving
  - Landscaping
  - Fencing
  - Lot lighting
  - Etc.

# Sch. R-4

**Report:** Complete: a separate schedule R-1 for each new Land improvement for Owner and/or tenant  
**Provide:** a description for "Landscaping" and "Other."

Items that may be classified as real estate	
Report any changes to these items on Schedule R-2 and Schedule R-4	
Boilers	Cranes and Cranesways
Transformers	Doc. levelers
Building electrical service	Railroad siding
Elevators	Truck scales
Building HVAC equipment	Tanks/Talos
Central air conditioning	
Refrigeration Equipment	
Plumbing piping and fixtures	
Sprinkler equipment	

## Paving

Improvement change \*  
 Required  Type of pavement   
 Depth (inches)  SQ. FT.   
 Paving Cost   
 \$

## Landscaping

Describe improvement change

Landscaping Cost   
 \$

## Sewer/Drainage System

Improvement change \*  
 Required  Type of sewer/drainage   
 Sewer/Drainage Cost   
 \$

## Water System

Improvement change \*  
 Required  Depth (feet)   
 Water System Cost   
 \$

## Railroad Siding

Linear FT   
 Railroad Siding Cost   
 \$

## Other - (ex: fences, lighting, curbs)

	Description	Cost

## Total Cost

Enter what you feel is the total effective value increase as a result of these changes.

Cancel

Save Draft

< Previous

Next >



# E-filing an M-R Form

## Schedule R-5

- ▷ Answered "No" to question 1 in Sch. A
- ▷ This schedule is updated to include questions related to business occupancy and activity
- ▷ To ensure continued classification as a manufacturer, it is important to answer the questions fully

## Sch. R-5 – Part A

### Real Estate Occupancy

#### Part A: Owner/Tenant Info

1. Are the tenant and real estate owner related or have common ownership? \*

Yes	No
-----	----

If Yes, Explain relationship to tenant/occupant

2. Is the building 100% owner occupied? \*

Yes	No
-----	----

What is the name of the business occupying the building? \*

*Required*

Product(s) manufactured on site. If no manufacturing, how is the building being utilized? (Warehouse, Office, etc.) \*

*Required*

3. Has any tenant vacated the real estate in the last year? \*

Yes	No
-----	----

If yes, add tenant name or explain

☐ 4. This building is occupied by multiple tenants?

5. Was this property leased on January 1? (If yes, fill in part B below)

Yes	No
-----	----

Sch. R-5 – Part B

Answered "No"  
to questions 1  
and 2 in Part A

Part B. Tenant/Occupant			Current Lease Information		
1. Is this a new tenant from the previous year?			Square foot leased	Lease \$ (\$/sqft or \$/mo)	Lease Type (Gross, Single Net, Double Net, Triple Net, Other)
<div>Yes</div> <div>No</div>			0	0.00	
Business Name			Number of months	Start Date	End Date
			0		
Mailing Address			Rent Includes (Select all applies)		
City	State	Zip	<input type="checkbox"/> Common Area Maintenance	<input type="checkbox"/> Real Estate Tax	<input type="checkbox"/> Electric
			<input type="checkbox"/> Heat	<input type="checkbox"/> Other	
Product(s) manufactured on site, if no manufacturing, how is the building being utilized? (Warehouse, Office, etc.)			If other, explain		
Email					
Phone					

Cancel

Add

# E-filing an M-R Form

## Schedule R-6

- ▷ Appears if 4(f) in Schedule A is "yes"
- ▷ Report changes to waste treatment facilities

## Schedule R-6

**Report:** the **real property owner or tenant** waste treatment activities below

1. Did the waste treatment status change in 2024? (ex: property no longer used for waste treatment; crops on vacant land sold; acreage used for waste treatment increased or decreased) \*

Yes	No
-----	----

2. Did the assets used for waste treatment have any physical changes in 2024? (ex: new construction; remodeling or changes to buildings or structures; demolition) \*

Yes	No
-----	----

Note: you may attach construction prints, photos, fixed asset lists or any additional documentation to help describe the project or to outline the changes in 2024

Cancel

Save Draft

< Previous

Next >

# E-filing an M-R Form

## Schedule R-7

- ▷ Appears if 4(g) in Schedule A is "yes"
- ▷ Report buildings on leased land

# Schedule R-7

Record 1

+ Add a Record

Copy Record

Delete this Record

Tenant Owned Building on Leased Land

Business name

Required

Size (Sq. Ft.)

Required

Year Built

Business Activity

Required

Original Cost

Estimated Market Value

1. Were any changes made to the tenant owned land or building improvements between January 1, 2024 - January 1, 2025?

Yes

No

If yes, explain below.

2. Are the real estate owner and tenant/occupant of the BLL related?

Yes

No

If yes, explain relationship below.

+ Add a Record

Copy Record

Delete this Record

Cancel

Save Draft

< Previous

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# E-filing an M-R Form

## Schedule B – summary of changes

- ▷ Review the totals
- ▷ To go back and correct a completed schedule, or add another schedule by choosing "Yes" to a question on Schedule A – use the report progression line at top of the page to move back and complete the action
- ▷ When you are finished – click the "Submit" button



# Schedule B

Form M-R

✓

Contact Information

✓

Schedule A

>

Schedule B

Filing Tips

Form Instructions

Schedule B

Summary of All Real Estate Changes

Below is a summary of the changes you declared for the real estate owner and/or tenant in this filing.

Changes - Complete the appropriate schedule for values	Cost	Value
1. New construction and construction in progress	0	0
2. Remodeling and construction in progress	0	0
3. Demolitions and demolitions in progress	0	0
4. Land improvements and construction in progress	0	0

Cancel

Save Draft

< Previous

Submit

# *Additional* Functionality

My Tax Account

# Manufacturing Sale Information

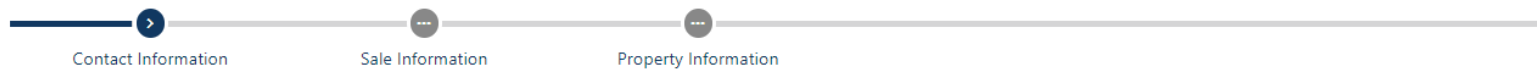
- ▷ Record a sale for manufacturing real estate
- ▷ Locate Wisconsin tax number (WTN) associated with the real estate account that you need to report a sale for
- ▷ Click "Record Sale"

<b>Manufacturing Real Estate</b> 123 MAIN ST BADGER WI 54321 Filing Frequency: Annual	237-1234567890-000 Balance <b>\$0.00</b>	<a href="#">&gt; File/View Returns</a> <a href="#">&gt; Record Sale</a>
--	--	--

# Manufacturing Sale Information

- ▷ Contact Information
  - Verify seller information
  - Make any necessary updates
- ▷ Buyer Information
  - Add buyer information
  - Validate address to proceed to next step

## Sale Information



### Preparer Information

Name

Email

Phone

### Seller Information

Do you need to update this contact information?

Yes	No
-----	----

Name

Email

Phone Country

USA

Phone Type

Business Phone

Phone Number

Ext.

Phone Country

USA

Phone Type

Fax - Business

Phone Number

Ext.

Cancel

Save Draft

< Previous

Next >

# Manufacturing Sale Information

- ▷ Sale Information
  - Date listed
  - Sale date
  - Sale price
- ▷ Identify how you arrived at sale price
- ▷ Was an appraisal done
- ▷ If appraisal was done, attach a copy
- ▷ Complete closing statement

## Sale Information

Contact Information

Sale Information

Property Information

Date Listed 



Sale Date 

Date listed cannot be a future date



Sale Price \*

*Required*

1. How did you arrive at the sale price?



2. Was an appraisal done?

Yes

No

## Attachments

Add Attachments

Type	Name	Description	Size (in kB)
------	------	-------------	--------------

There are no attachments.

Cancel

Save Draft

< Previous

Next >

# Manufacturing Sale Information

## ▷ Property Information

- Provide county register of deeds document number
- Type of sale
- Indicate if personal property was included
- Choose financing method
- Answer questions about seller financing
- Multiple parcels
- Relationship of buyer to seller
- Real estate agent involvement



## Sale Information

Contact Information

Sale Information

Property Information

### Real Estate

Provide county register of deeds document number: \*

Required

1. Type of sale:

☐ Asset

☐ Investment

☐ Lease-buyback

☐ 1031 exchange

☐ Stock

☐ Other

Describe type of sales:

2. Was any personal property included?

Yes

No

If yes, enter value.

0.00

Describe included property:

3. Financing:

☐ Cash

☐ Bank

☐ Land contract

☐ Other

Describe financing:

4. Was there any seller financing?

Yes

No

5. Did the sale include multiple parcels?

Yes	No
-----	----

6. Relationship of the buyer to seller: 1

☐ None

☐ Relative

☐ Business

☐ Tenant

☐ Adjacent owner

☐ Other

Describe relationship:

7. Was a real estate agent involved with the sale?

Yes	No
-----	----

If yes, provide realtor/broker information:

### Realtor Information

Company Name

Street

Street 2

Unit Type

Unit

City

State

Zip Code

Contact First Name

Contact Last Name

Validate Address

Email

Phone

Cancel

Save Draft

< Previous

Submit

# Filing a Valuation Appeal

- ▷ Choose the manufacturing real estate account
- ▷ Click "File/View Returns"

Summary Action Center <sup>1</sup> Settings More...

Filter

**Manufacturing Real Estate**

123 MAIN ST  
BADGER WI 54321  
Filing Frequency: Annual

237-1234567890-000

Balance  
\$0.00

> File/View Returns  
> Record Sale

# Filing a Valuation Appeal

- ▷ Start filing your appeal
- ▷ Click "Appeal" in upper right corner

<b>Returns</b>	Balance	<a href="#">&gt; Appeal</a>
Manufacturing Real Estate	<b>\$0.00</b>	<a href="#">&gt; View or Cancel Scheduled Payments</a>
237-1234567890-000		
MANUFACTURING COMPANY LLC		


# Filing a Valuation Appeal

## ▷ Appeal Information

- Enter the Letter ID from your Notice of Manufacturing Real Estate Assessment
- Appeal period must be December 31 (of the assessment year you are appealing) – for this year, Dec. 31, 2024

Appeal Information	
Account Type	(237) Manufacturing Assessment Real Estate
Letter ID	L0355698640
Notice Date	
Notice Type	
Appeal Period	31-Dec-2023

	<b>WISCONSIN DEPARTMENT OF REVENUE</b> 819 N 6TH ST RM 530 MILWAUKEE, WI 53203-1606	<b>Contact Information:</b> Milwaukee Manufacturing District - 77 819 N 6TH ST RM 530 MILWAUKEE, WI 53203-1606 ph: 414-227-4406 fax: 414-227-4095 email: mfgtd77@wisconsin.gov website: revenue.wi.gov
000411	Letter ID	L0355698640
MANUFACTURING COMPANY LLC 123 MAIN STREET BADGER WI 54321		
<b>2023 Notice of Manufacturing Real Estate Assessment</b>		

# Filing a Valuation Appeal

- ▷ Enter your opinion of value
  - Assessment as shown on Notice of Assessment auto-fills
  - You must enter your opinion of value
- ▷ If property is exempt
  - Click "Yes" – opinion of value field auto-fills with "0"
  - You must enter a reason/basis explanation if you select "Yes"

### Objection to Manufacturing Real Estate Assessment

Assessment as shown on notice - Total 1,534,900

The property is exempt or has no value. Explain within the Reason and Basis fields below.

☒ Yes ☐ No

Your opinion of value – Total 100,000

Notice of Manufacturing Real Estate Assessment	
Real Estate Assessment	
Land	\$278,300
Improvements	\$1,256,600
<b>Total 2023 Real Estate</b>	<b>\$1,534,900</b>

# Filing a Valuation Appeal

- ▷ Reason for Objection and Basis of Estimate
  - These fields must be filled in
  - If there is no reason or basis entered, the BOA will dismiss your appeal
  - Sec. 70.995(8)(c)(1), Wis. Stats.
  - "N/A" is not acceptable

## Reasons for Objection and Basis of Estimate

Enter your reason(s) for objection

Must enter a reason for objection or your appeal will be dismissed.

Enter basis for your opinion of value

Must enter basis for your opinion of value or your appeal will be dismissed.

# Filing a Valuation Appeal

- ▷ Submitting Additional Information
  - Choose "Yes" if you do not intend to send additional information
  - The BOA will process your appeal faster if there is no 60-day wait for additional information

## Submitting Additional Information

Under state law (sec. 70.995(8)(c)2., Wis. Stats.), you may submit additional information to the State Board of Assessors (BOA) within 60 days of your appeal.

I hereby waive my right to provide additional information to the BOA under sec. 70.995(8)(c)2., Wis. Stats. \*

Yes

No



# Filing a Valuation Appeal

- ▶ Authorized Agent
  - If an authorized agent is filing, they must fill in the agent information
  - Click "Validate address" to continue

**If you are an authorized agent, complete the information below and attach an Agent Authorization Form (PA-105).**



Name		
<hr/>		
Company or Title		
<hr/>		
Street		
<hr/>		
Street 2		
<hr/>		
Unit Type	Unit	Country
<hr/>	<hr/>	USA
City	State	Zip Code
<hr/>	WISCONSIN	<hr/>
<hr/>		
<b>Validate Address</b>		

# Filing a Valuation Appeal

- ▷ Enter date of appeal

Date 

- ▷ If applicable, attach Agent Authorization Form (PA-105)

 Agent authorization attachment required 

**Attachments** Add Attachments

Type	Name	Description	Size (in kB)
There are no attachments.			

Cancel < Previous Next >

# Filing a Valuation Appeal

## ▶ Adding Attachments

- If you have documentation to provide (i.e., agent authorization, an appraisal, lease), attach it here
- Click "Add Attachments"
- Select file to attach
  - Choose file type from the dropdown
  - Enter description
  - Choose your file and click "OK"

Select a file to attach

Type  
Agent Authorization - Property Assessment

Description  
Agent Authorization

File  
Choose File left-102f.pdf

Cancel OK

# Filing a Valuation Appeal

- ▷ Payment due at time of filing – complete the following
  - Select checking or savings
  - Enter bank routing number
  - Enter account number
  - Confirm account number
  - Enter \$200.00 to confirm fee amount
- ▷ If no fee is due – payment screen does not appear

Payment Source	Payment
Type	Payment Date
Direct Debit	09-May-2023
Bank Account Type *	Amount
<input type="radio"/> Checking	200.00
<input type="radio"/> Savings	Confirm Amount
Routing Number *	Required
Required	
Populate Routing Number	
Account Number *	
Required	
Confirm Account Number *	
Required	
Save this payment source for future use	
<input type="button" value="No"/> <input type="button" value="Yes"/>	

# Filing a Valuation Appeal

- ▷ Preparer Information
  - Confirm information and click "Submit"

**Account**  
Manufacturing Real Estate  
237-1234567890-000  
MANUFACTURING COMPANY LLC

**Appeal Bill or Notice**

✓

✓

➔

AppealMfg Assessment AppealsPreparer

**Preparer Information**  
Name : JOHN MANUFACTURING  
Phone Number : (608) 222-3333  
Email : jmanufact@company.com

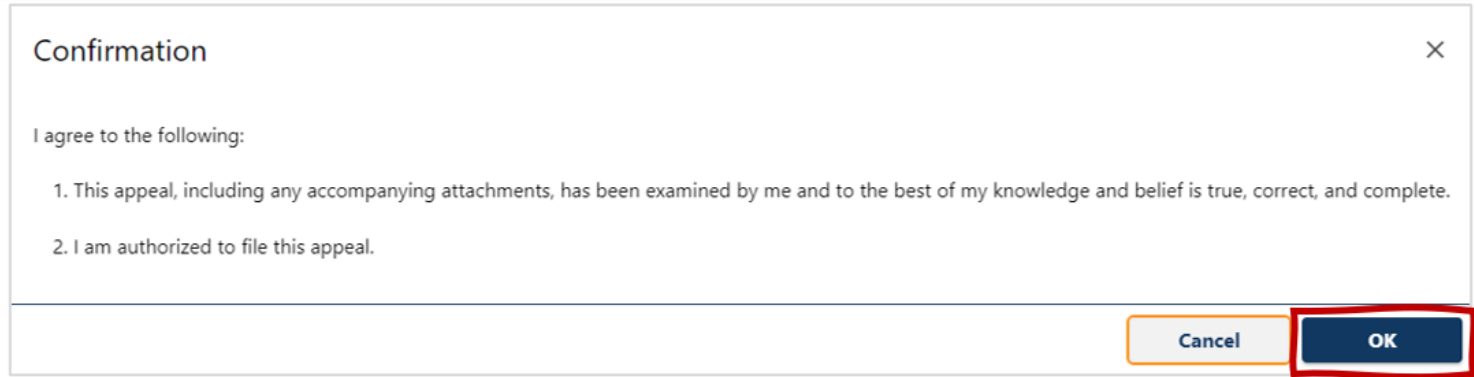
Cancel

< Previous

Submit

# Filing a Valuation Appeal

- ▷ Confirmation agreement screen
  - Click "OK" to continue



A screenshot of a software confirmation dialog box titled "Confirmation" with a close button (X) in the top right corner. The text inside the dialog reads: "I agree to the following:" followed by two numbered items: "1. This appeal, including any accompanying attachments, has been examined by me and to the best of my knowledge and belief is true, correct, and complete." and "2. I am authorized to file this appeal." At the bottom right of the dialog are two buttons: "Cancel" and "OK". The "OK" button is highlighted with a red rectangular border.

Confirmation

I agree to the following:

1. This appeal, including any accompanying attachments, has been examined by me and to the best of my knowledge and belief is true, correct, and complete.
2. I am authorized to file this appeal.

Cancel OK

# Filing a Valuation Appeal

- ▷ Confirmation screen
  - Print a copy for your records

## Confirmation

Your appeal is submitted.

Your confirmation number is **1-454-073-440**.

Appeal for	MANUFACTURING COMPANY LLC
ID number	1234567890
Date submitted	15-Jul-2023 at 11:23:16 AM
Account type	(237) Manufacturing Assessment Real Estate
Letter ID	L0355698640
Appeal period	December 31, 2023
Appeal explanation	
Appeal deposit	No
Prepared by	JOHN MANUFACTURING
Phone	(608) 222-3333
Email	jmanufact@company.com

[Print Confirmation](#)

[View Submission](#)

[OK](#)

# Questionnaire – Potential Manufacturer

▷ <https://www.revenue.wi.gov/Pages/Form/manuf-home.aspx>

Form ▶	Name/Description ▶
<a href="#">EFT-102M (Fill-In Form)</a>	Manufacturing and Utility Electronic Filing Waiver Request
<a href="#">PA-105 (Fill-In Form)</a>	Agent Authorization - Property Assessment Fillable PDF
<a href="#">My Tax Account</a>	Property Owner Objection to Real Estate Assessment ( <a href="#">Filing an Appeal in MTA</a> )
<a href="#">PA-130 (Fill-In Form)</a>	Objection to Manufacturing Classification Decision
<a href="#">PA-132M (Fill-In Form)</a>	Municipal Objection to Manufacturing Real Estate Assessment
<a href="#">PA-133 (Fill-In Form)</a>	Objection to Manufacturing Filing Penalty
<a href="#">PA-138 (Fill-In Form)</a>	Appeal Withdrawal
<a href="#">PA-750R Instructions</a>	Instructions for Completing 2025 Wisconsin Manufacturing Real Estate Return
<a href="#">PA-780 (MTA)</a>	Questionnaire for Potential Manufacturers



# Questionnaire – Potential Manufacturer

**Manufacturers Classification**

Business Owner

**Business owner information**

Business Name \*

Required

Business FEIN \*

Required

Doing Business As (DBA) Name \*

Required

Business Phone Number \*

Required

Business Email Address \*

Required

County \*

Required

Municipality Type \*

City

Town

Village

Municipality Name \*

Required

# Resources

# MTA Resources



- ▷ Common Questions
  - Manufacturing specific – [revenue.wi.gov/Pages/FAQS/slf-mta-access.aspx](https://revenue.wi.gov/Pages/FAQS/slf-mta-access.aspx)
  - General (for businesses) – [revenue.wi.gov/Pages/FAQS/mta-using-mta.aspx](https://revenue.wi.gov/Pages/FAQS/mta-using-mta.aspx)
- ▷ Business videos
  - [youtube.com/playlist?list=PLWzuhzN1RU\\_9nmzATTJFZxpMerT3trz8K](https://youtube.com/playlist?list=PLWzuhzN1RU_9nmzATTJFZxpMerT3trz8K)
- ▷ DOR training page
  - [revenue.wi.gov/Pages/Training/Home.aspx](https://revenue.wi.gov/Pages/Training/Home.aspx)
  - Recorded version of this webinar posted within a week
  - Q&A from this webinar as a PDF

# Contact Us

- ▷ General MTA questions
  - [dormytaxaccounthelp@wisconsin.gov](mailto:dormytaxaccounthelp@wisconsin.gov)
  - (608) 261-5338
- ▷ Manufacturing specific MTA questions
  - Contact the district office in your area: [revenue.wi.gov/Documents/slfdoc.pdf](https://revenue.wi.gov/Documents/slfdoc.pdf)

# Thanks!

