Q&A from January 17-18 MTA Webinars for Manufacturers

Below are the Wisconsin Department of Revenue (DOR) responses to questions from the January 17-18, 2023, My Tax Account (MTA) Webinars for Manufacturers.

1. **Can I print the M-P or M-R Forms after submitting them?**
   Currently this function is not available, however, it should be available mid-February. As an option, you can always save your return as a draft on MTA and have a client review it in the meantime. Once the functionality is enabled, you will be able to go back and print out past submissions. You may also take screenshots in the interim.

2. **Was this session recorded, and will it be sent out?**
   Yes. This session was recorded and will be available on our training web page approximately one week after this presentation.

3. **Can you elaborate on the "Manage My Users' Access" functionality for CPA firms with multiple users?**
   Each third-party preparer is required to have their own My Tax Account (MTA) username and password registered under the accounting firm's credentials. The logon information cannot be shared among multiple preparers. One master MTA user can manage other accountants' access under "Manage My Users' Access." See Third-Party Preparers My Tax Account Access. If you need more information, contact your district office to discuss further.

4. **Can third-party preparers use a Letter ID rather than the multiple pieces of information required to obtain third-party access?**
   Third-party preparers cannot use the Letter ID. They can gain My Tax Account third-party access to clients by providing the 2022 Schedule Y-P/Y-R total values instead. If your client was a paper filer in 2022, contact your district office to discuss the access issue in more detail.

5. **Will third party preparers with access to hundreds of accounts have the ability to get a report of the extended status of clients so that we don't have to click each one to double check?**
   Currently, there is no report available to review accounts. You must review each account separately.

6. **Is the asset list a required attachment only if it is a first-year filing?**
   Yes. The asset list is only required the first year; however, including the fixed asset list is always a good idea and can save time when talking to your district office.

7. **If the M-P Form is filed under a business name and the M-R Form is filed under my personal social security number, do I have to register myself so that I can file my return, or can it be somehow linked to my M-P business account?**
   You can file both M-P and M-R returns under the same MTA logon information. In this example, you can request access to your manufacturing real estate account by going to "Manage My Profile," clicking "Add Access to Third Party Account" and following the steps to confirm necessary information prompted on the screen. Contact your district office for further assistance.

8. **I am a CPA trying to add access to the M-P Form for my client, whom I have prepared for previously through the old portal. I went through the add third-party account access process and it is appearing, but it is also advising that I need to have Form A-777a completed by the account owner. Is this form filed within the MTA system, on paper or what? Please advise so can advise clients.**

   Form A-777a is not filed within the MTA system. The account owner can fill it out by paper or electronically (ex: via DocuSign). You would then keep this form from your client in your records.

9. **So, this Form (A-777a) is not submitted to any DOR agency, just kept in my records and theirs?**
   That is correct. The account owner can fill out Form A-777a by paper or electronically (ex: via DocuSign). This form does not need to be submitted to the Wisconsin Department of Revenue. Both the preparer and client should keep this form in their records.

10. **My current login doesn't show our manufacturing returns. Did I miss how to add them?**
    Your MTA login will not show the manufacturing accounts automatically upon your login. You need to request access to them by going to "Manage My Profile," clicking "Add Access to an Account" (or "Add Access to Third Party

Account" if you own multiple businesses) and following the steps to confirm necessary information prompted on the screen.

11. **If we are already set up as an MTA user, will the M-Forms be added automatically or do we need to add the tax type?**
    You need to add each real estate and personal property account separately using the Letter ID or the previous year's (2022) Schedule Y-P/Y-R value.

12. **If I am a TPA, does the client need to add the accounts to their MTA before I can add them to my TPA?**
    The client does not need to add the manufacturing accounts to their MTA login first. As a third-party accountant, you have functionality to add them by going to "Manage My Profile," clicking "Add Access to Third Party Account" and following the steps to confirm necessary information prompted on the screen. Contact your district office for further assistance.

13. **The property I need to report on was transferred from one sister company to another. Do I need to file a final report for the first company and start a new report for the new company? Or can we transfer the information from the first company?**
    Contact the district office in your area to inquire about this procedure and how to handle it accordingly.

14. **Can I have more than one client going to my email address?**
    Yes. As a third-party preparer, you can add all your clients under your MTA profile.

15. **I have an M-R client who does not have an email. He cannot setup his own account.**
    You may add the client under your MTA profile as a third-party preparer.

16. **When requesting an extension, when will I be alerted that it has been granted?**
    Extension approvals (or denials if submitted after the first business day in March) occur overnight. You can see the extension request response the next day. If you request an extension before the due date, it is granted automatically overnight and your submission is moved to the "Processed" tab. You will not receive a separate alert.

17. **What do I do as a Third Party when attempting to add an account, but it is telling me that the FEIN does not match? I have confirmed the FEIN with the business owner.**
    This question requires more detail. Contact your district office to further discuss your question.

18. **What do we do with a client that is an LLC and does not have a FEIN?**
    The Wisconsin Department of Revenue mailed a letter to this client, which contains a Wisconsin Taxpayer Number (WTN). This number can be used to gain third-party My Tax Account access. Contact your district office to further discuss your question.

19. **I've attempted to add accounts as a Third Party, using the LLC name, FEIN, and the Manufacturing account number as listed in the previous Manufacturing Assessment system, but then get an error indicating that the client does not have an account of that type. What do I do?**
    More research needed in this case. Contact the appropriate district office for assistance.

20. **I'm a CPA preparing M-R/M-P Forms for clients. Does every client need to set up M-R/M-P in their MTA accounts and do I then need to turn around and request permission to link to their account? Or is there a simpler way to do this?**
    The client does not need to add the manufacturing accounts to their MTA login first. As a third-party accountant, you have functionality to add them by going to "Manage My Profile," clicking "Add Access to Third Party Account" and following the steps to confirm necessary information prompted on the screen. Contact your district office for further assistance. Refer to the MTA Common Questions for more information on requesting third-party account access.

21. **If we already have a My Tax Account, how do we add the Manufacturing type?**
    You need to request access to the manufacturing account by going to "Manage My Profile," clicking "Add Access to an Account" (or "Add Access to Third Party Account" if you own multiple businesses) and following the steps to confirm necessary information prompted on the screen. You may use your Letter ID or the Schedule Y-P or Y-R value from your previous year's return.

22. **Do you have to add the type for M-P and M-R to each user? And do you have to call in to add them to the summary page?**
Each manufacturing account type needs to be added individually under each user. Once the accounts are added, they will automatically appear on the "Summary" tab of MTA home page.

23. **I am trying to add Manufacturing Personal Property to my MTA. When I enter my account number and column 5, Line 12 Y-P amount, I get a message that the amount is wrong. How do I add access to my MTA account?**
This situation requires more in-depth research. Contact your district office for further assistance.

24. **What is the phone number for my local manufacturing personal property district office for Watertown, WI?**
Contact the Madison district office, which services your location.

25. **I'm a partner in a CPA firm. Two partners have usernames with personal property clients under our usernames. Under MTA should the partners have their own MTA profile for their specific clients, or should all be run through our firm's MTA account?**
Everyone should use their own unique MTA profile.

26. **Is DOR linking our clients to our user account or do we need to do that on our own through "Request Access to a Third-Party Account" even though we already had access under the old system?**
You need to link your accounts on your own. See Need to Access Multiple Businesses.

27. **I did not receive a greeting letter in the mail.**
Contact your district office for assistance.

28. **When I login, none of my client's accounts are listed. How do I regain access to their accounts?**
The clients' accounts will not appear automatically, you need to request third-party account access to them first. It sounds like this question requires more detail. Contact your district office to further discuss your question.

29. **Last year before submission you could click a button to see if there were any errors or omissions before filing. Is there anything that would notify you if there is an error before submitting?**
My Tax Account will not let you submit a return until all the errors are cleared. You will receive error messages throughout filing – if applicable. The system will not proceed to the next step if you encounter errors on the form.

30. **We already have an MTA login with access to areas such as sales tax. Is there a way to get this area added to our account?**
You need to request MTA third-party access to all manufacturing accounts individually. See Access my Business Tax Accounts Online. If you need more information, contact your district office to discuss in more detail.

31. **What about individuals who own multiple businesses and only have one email address? Does each business need its own My Tax Account which would require separate email addresses?**
You have two registration options as a business owner or employee needing access to multiple businesses/governmental entities – see Need to Access Multiple Businesses.

32. **I am trying to add the Manufacturing Real Estate Account, but I get "You are not registered for that account type." What do I do?**
You need to add the account as a third-party user. Use the total value of the previous year's Schedule Y-R. You might not be a third-party user, but that is how the system is setup. If you filed for tax year 2022 by paper, you will not be able to use your 2022 Schedule Y-R balance, you will need to use a Letter ID instead. If you are still experiencing issues, contact the appropriate district office.

33. **When I created my account, it said step 4, adding the manufacturing PPT account, would be done later. Where do I do that in MTA now that I'm logged in?**
Go to "Manage My Profile" to add account access. See Access my Business Tax Accounts Online. If you need more information, contact your district office to discuss in more detail.

34. **What if it says, "new logon disallowed"?**
Your email may already be in use. You can contact MTA customer service at (608) 261-5338 or DORMyTaxAccountHelp@wisconsin.gov for further assistance.

35. **Will the business owner be able to use the same email address for two different MTAs?**
No. You can only use one email per User ID profile. However, you have two registration options as a business owner or employee needing access to multiple businesses/governmental entities – see Need to Access Multiple Businesses.

36. **I tried adding a Manufacturing RE account, and after I entered in the state ID# and prior year balance, I got an error message, "You are not registered for that account type." Not sure what's going on because I was able to add all our other property tax accounts.**
You need to add the account as a third-party preparer. Use the total value of the previous year's Schedule Y-R. You might not be a third-party user, but this is how the system is setup.

    So then how come it worked for our other RE accounts?
    It may be under other entities. Contact your district office for further assistance. They will help you walk through the necessary steps.

37. **Can a third-party preparer set up the M-R or M-P Form even though they do not have an MTA account set up or registered?**
No. The preparer must have their own unique username and email to register and access MTA.

38. **Is the State ID number found on last year's report after the "R" or "P"?**
Yes. The nine-digit number is found within state identification number after the "R" or "P."

39. **If I exceeded my log in attempts and got locked out of account, who do I contact to get unlocked?**
You can contact MTA customer service at (608) 261-5338 or DORMyTaxAccountHelp@wisconsin.gov for further assistance.

40. **Are PDF (paper) forms still acceptable? If so, are these forms available on the Wisconsin Department of Revenue website and/or in MTA?**
We encourage electronic filing; however, you may file a DOR prescribed form when they become available. Paper forms will be available on the DOR website in late January.

41. **Is the extension deadline still March 31, 2023?**
Filing extensions are until April 3, 2023. You must request an extension by March 1, 2023 to receive an extension.

42. **I get an error when trying to add an account saying, "You are not registered for that account type." What am I doing wrong?**
It depends on what identification number, legal (business or individual) name and 2022 Schedule Y-P/Y-R value you are using. Contact your district office for further assistance.

43. **If you have 40 M-R/M-P returns that you file, is there a quick way to add all the accounts to your My Tax Account?**
Unfortunately, there is no quick way – all 40 accounts need to be added separately. You could contact your district office to see if they could provide further assistance.

44. **Is there a way to see if you have all the M-P and M-R Forms that you filed last year?**
You can compare your My Tax Account access to the Manufacturing Assessment System (MAS) where you can review your historical filings. You can identify if all M-Forms have been added in MTA this way.

45. **We are an accounting firm with clients that have multiple M-R Forms that need to be filed. When we request access as a third party, how can we tell which property is associated with the account # because the state ID # does not show on the home screen?**
You can view location (situs) addresses and 2022 values to pinpoint which account is associated with a state identification number. We are considering a future enhancement to display a state ID on the home screen or within the account.

46. **During the webinar, I tried adding our company's real estate and personal property accounts but had an error when asked for the prior return Y-R and Y-P balance. What should I do?**
If you filed by paper, your 2022 Schedule Y-P/Y-R values were not carried over to MTA. You should be able to use a Letter ID instead. If the issue persists, contact your district office for further assistance.

47. **Can the client (business) authorize the entire firm? Or do they have to pick a specific person at the accounting firm?**
The client authorizes the firm as a whole. The accounting firm internally assigns who would prepare the M-Form.

48. **If a principal has multiple business entities with various tax account types for each, should each entity set up an MTA account? Then if the principal wishes to have a quick view to all their entities, should they also set up an individual MTA account and use third-party access for these multiple entities? Confirm that ALL entities must first have THEIR OWN MTA account before an individual can use third-party access to add them?**

    The entities do not have to have their own MTA profile before a third-party preparer requests access online. See Need to Access Multiple Businesses – You have two registration options as a business owner or employee needing access to multiple businesses/governmental entities:

    1. You may log in to your already existing My Tax Account profile, select Manage My Profile, More... and lastly Add Access to a Third-Party Account. This can also be used as an alternative method to register to "File and Pay" for your multiple business entities under one username. Enter the required information to request access to each of your business entities. This registration method does not provide you with "Master" level access for these additional business entities.
       Note: We recommend that the owner/officer of each business entity obtain their own unique username to access their business in My Tax Account. This will allow the business owner to have "Master" level access.
    2. You may also create a My Tax Account profile for each business if you prefer. Each My Tax Account profile requires a unique profile email address.

49. **When you save a report for later editing MTA states, "You have started a submission but haven't submitted it. Submissions may be expired if not submitted" – how long until they expire?**
    The draft does not expire until the third Friday in May when access to the current filing year's forms ends automatically for all manufacturing accounts.

50. **On the screen "Request Access to an Account," how do I change the business that defaults on the top of the screen?**
    The business listed as default at the top of the screen cannot be changed as your My Tax Account username has been associated with it upon initial registration. If you need access to multiple businesses, you may log in to your already existing My Tax Account profile, select "Manage My Profile," "More..." and lastly "Add Access to a Third-Party Account." Complete the remaining steps and verify necessary information in the prompted fields. Contact your district office for further assistance.

51. **Is there a way to see a "draft" prior to submission like there was in the previous platform?**
    You can save your submission as a draft. This option is located in the bottom-left corner of the return. You can then view the draft from the "Submissions" tab, edit it with necessary changes, review and submit.

52. **When I add the Manufacturing account, I missed what you said about the letter?**
    If you are the business owner, employee, or property owner, you may use the Letter ID (located in the top right corner of the letter that was sent to you) to add your manufacturing account.

53. **I have been trying to request third-party access for some of my clients that I filed M-R reports for in past years. I have the account number and prior year amounts as requested in MTA...but I have been receiving error messages such as, "Client does not have the account type you selected" or "Invalid ID or ID type." How can I get third-party access for these clients?**
    This will require more research as to how these manufacturing accounts have been linked to the clients. Contact your district office for further assistance.

54. **How do I add the manufacturing return to the summary page to access it?**
    You need to request access as an individual or third-party preparer under "Manage My Profile."

55. **I have a client who does not use the internet or have an email address. He has a M-R return I need to file. In order to file, does he need to setup an MTA user, or can I get his M-R assigned to me so I can file the return?**
    You may setup an MTA account as a third-party preparer to file for your client. If you are an existing MTA user, you can request third-party account access to this client under "Manage My Profile."

56. **How do you know what supporting documents to include?**
    - Manufacturing personal property return – when filing for the first time, you must attach an asset list. An asset list is a list of all personal property with years of acquisition and correlating values.

- Manufacturing real estate return – have required attachments if Schedule R-1 (new construction) is filed, if exempt building materials on Schedule R-1 are claimed (an additional attachment), and if Schedule R-3 (demolition) is filed

Refer to the manufacturing returns instructions or contact your district office for further assistance.

57. **If we purchase new land, will we be sent the State ID number?**
Contact your district office for further assistance with this specific question. They might require you to submit paperwork to get a state identification number issued.

58. **How do the account numbers in MTA correlate to the M-P or M-R account numbers? For example, 238-xxxxxxxxxx-009 versus 79-55-176-Pxxxxxxxxx?**
The 16-digit Wisconsin Taxpayer Numbers (WTNs) have locations (situs addresses) associated with them which, in turn, correlates with the situs address on file for the state identification number. The first three digits in WTNs identify an account type – in this case, this is a manufacturing personal property account as it starts with 238 and letter "P" is a preceding letter before the last nine digits in the state ID number. Contact your district office to discuss your question in more detail.

59. **How long does a taxpayer have to amend a return once submitted?**
I recommend contacting your district office if you're going to amend a form.

60. **I was trying to add a client so I can file the M-P return. I entered the amount on the Y-P schedule from last year's return and I am getting an error, "invalid authorized amount."**
Based on the error message, your records might have an incorrect amount on Schedule Y-P/Y-R. Contact your district office for further assistance.

61. **Will old IDs be brought over from the old system, or do we need to request to them all in MTA?**
You need an MTA profile to access MTA. WAMS IDs used in the Manufacturing Assessment System (MAS) are not used in MTA.

62. **Previously we could download an M-R Form, fill it out and then upload it. Is this still possible?**
You no longer need to download forms since they are now web-based. You fill them out step-by-step in MTA.

63. **We have very complex personal property returns. Is there one available to use as reference when filing?**
The Wisconsin Department of Revenue does not provide samples of complex manufacturing personal property returns. You can reference the instructions to make sure the schedules are filled out accurately. You may also file a complex personal property return in MTA and save it as a draft for reference as needed. Keep in mind, drafts are automatically removed by the system approximately every 6 months.

64. **How do I add a Manufacturing Real Estate return from another business entity in MTA that is not already listed in MTA?**
See Third Party Preparer to Access my Business Tax Accounts Online. If you need more information, contact your district office to discuss in more detail.

65. **Can you view an M-form after you file it?**
Yes. You may view your submission electronically within MTA. It is located on the MTA home page under "More…" tab > "View Submissions."

66. **We have always used a third-party to prepare our M-R and M-P Forms. We already have an MTA. Do we add the M-Forms to our account and give third-party provider access, or can they file them under their MTA account?**
A third-party preparer uses their own username and password and adds access to each of the manufacturing accounts they are filing on behalf of. See Accounting Firms/Third Party Preparers.