

Wisconsin Department of Revenue Electronic Real Estate Transfer Return - eRETR

Completing the
Real Estate Transfer Fee Transmittal
(P-520)

Revised Real Estate Transmittal - Benefits

All data fields completed through monthly download

- RETRs completed on line: data fields complete without calculating entries
- Few Waivers approved for filing paper return
 - ✓ When receiving: enter on Worksheet page & on Adjustment line of Transmittal
- Enter 80% of fee on Adjustment line
- If exempt from fee, enter 0

No printing & mailing transmittal

- Multiple mailings to bank & DOR no longer accepted
- Save monthly file & e-mail to DOR at utility@revenue.wi.gov

No mailing of checks

- Must use MY *tax* ACCOUNT for monthly payment – <http://www.revenue.wi.gov>
- Payment process is used for withholding & sales tax payments
- Use WAMS ID & password

Assessors & Government Offices Page

<http://www.revenue.wi.gov/ust/retn2.html>

Real Estate Transfer - Assessors and Government Offices

All Users

- [Log-in to eRETR](#) to view or process returns
-

Individual Government Processes

Assessors

- eRETR [Training/Help](#)

Real Property Listers

- eRETR [Training/Help](#)

Register of Deeds

- eRETR [criteria](#) for a completed receipt.
- File an amended [PE-500x](#) for eRETR correction.
- eRETR [Training/Help](#)
- Paper PE-100 [criteria](#) for completed Real Estate Transfer Return.

Treasurers

- Form P-520 [Treasurer's Transmittal](#) Spreadsheet
- **MY tax ACCOUNT**
- eRETR [Training/Help](#)

Open & Save
Transmittal



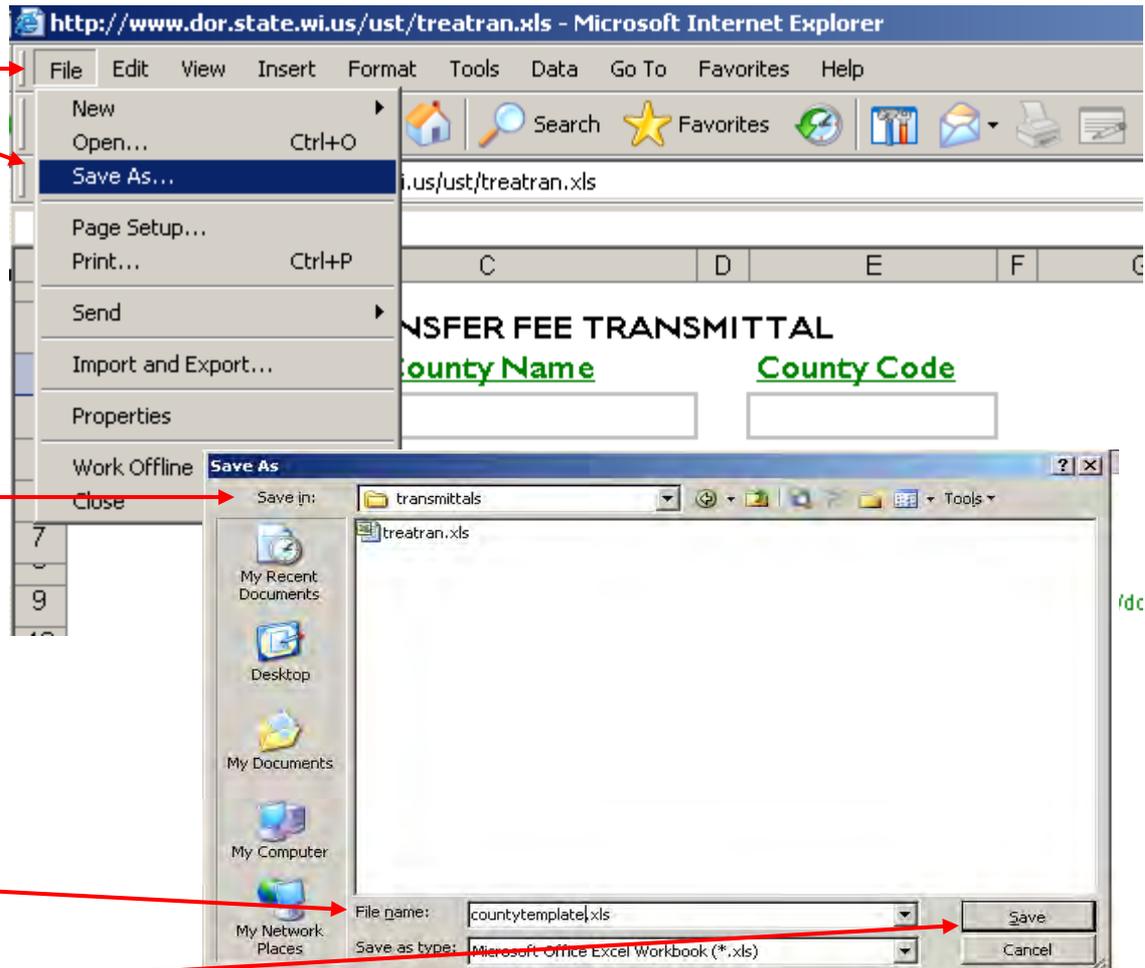
Save the Transmittal as Template

1. Click on File then Save As

2. Select Directory /Folder

3. Select name

4. Save



Open Saved Template & Complete With County Information

1. Fill in county name
county code &
reporting date will
fill in automatically

REAL ESTATE TRANSFER FEE TRANSMITTAL

County Name County Code Reporting collections for Month of

0 January-00

		COLLECTION
1	Number of returns with a fee	0
2	Number of returns without a fee	0
3	TOTAL RETURNS	0
4	Fees collected by COUNTY	\$0.00
5	STATE share of fees collected (80%)	\$ -

Adjustments (explain each, Enter Doc. #)

<input type="text"/>	<input type="text"/>	
6	Total adjustments	\$ -
7	Net due Dept. of Revenue	\$ -

Adjustments include -
- Paper return with a Waiver. List Document #.
- 1 mill payments. Subtract an additional 30% of the total fee to equal your 50% share. List Doc. #

2. Fill in name of preparer, title, telephone number, e-mail & date prepared

Name and address of preparer Title

Telephone Number

E-mail address Date prepared

3. Save as a template for a “master” to use each month

State law (s. 77.24) requires county treasurers to remit the fees and returns to the department by the 15th day of the month following the close of the month in which the fees were collected.

a. E-mail this Real Estate Transfer Fee Transmittal (P-520) and spreadsheet to:

utility@revenue.wi.gov

b. Make payment via **MYtax ACCOUNT**

<http://www.revenue.wi.gov>

Downloading the Monthly Transfer Returns

Real Estate Transfer - Assessors and Government Offices

All Users

Log-in to eRETR
data

- 
- [Log-in to eRETR](#) to view or process returns
-

Individual Government Processes

Assessors

- eRETR [Training/Help](#)

Real Property Listers

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Register of Deeds

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Treasurers

- Form P-520 [Treasurer's Transmittal](#) Spreadsheet
- **MY tax ACCOUNT**
- eRETR [Training/Help](#)

WAMS Log In

1. Enter your User ID
2. Enter your password
3. Login

WAMS
WEB ACCESS
MANAGEMENT SYSTEM

User ID:

Password:

[Click here to bookmark this page](#)

WARNING: This system is for authorized users only; system access is monitored. By using this system you expressly consent to this monitoring. Unauthorized use of, or access to, this system may subject you to criminal prosecution and penalties.

Need a WAMS User ID?

[Forgot your password?](#) | [Is your account locked?](#) | [Request a Wisconsin User ID and Password](#) |

[Change User Info](#)
(Name, E-mail, Password, Logon ID)

Confidentiality Statement

Electronic Real Estate Transfer Return

Department of Revenue

RETR Confidentiality:

The real estate transfer returns filed under Sec. 77.22(1) Wis. Stats., both paper and electronic, are privileged information per Sec. 77.265 Wis. Stats. Assessors, assessment staff, and county officials shall maintain the confidentiality of the real estate transfer returns except as follows:

- 77.265 (2)** *The local assessor shall permit the inspection of all returns filed under this subchapter for property within any local unit of government for which property taxes are levied by the chief elected official, or a person designated by the official, of that unit upon the adoption of a resolution by the governing body of the unit directing the official to inspect the returns for the purpose of reviewing the basis upon which equalized values were established by the department of revenue under s. 70.57, and the official or designee shall maintain the confidentiality of the returns.*
- 77.265 (5)** *The department of revenue, county real property listers under s. 70.09 and local assessors and their employees and agents may use the returns.*
- 77.265 (7)** *In a condemnation proceeding or in an appeal of an assessment of real property, the property owners and the owners' agents may inspect the returns.*
- 77.265 (8)** *A county may use the returns to develop a tract index if the county does not reveal the social security numbers of any buyers or sellers.*

The following exceptions are typically processed through the Department of Revenue:

- 77.265 (3)** *The returns may be used in any proceeding involving the requisite amount of the fee.*
- 77.265 (4)** *The department of workforce development may use the returns under s. 106.50.*
- 77.265 (6)** *Governmental agencies acquiring real property for public purposes may use the returns.*

All other requests to view or access the real estate information provided here must be forwarded, in writing, to:

Real Estate Transfer Return Custodian of Documents:
ATTN: SLF Deputy Division Administrator
P.O. Box 8971, MS 6-97
Madison, WI, 53708-8971

A breach in the confidentiality of the real estate transfer return may lead to a review by the Secretary of Revenue or a designee, per Sec. 73.09(7)(a) Wis. Stats., who may revoke the certification of any assessor, assessment personnel or expert appraiser for the practice of any fraud or deceit in obtaining certification, or any negligence, incompetence or misconduct, including making a fraudulent change in the assessment roll after it is opened for examination under Sec. 70.47(3) Wis. Stats.

I have read the above statutory references and agree that I have statutory authority to view the Wisconsin Real Estate Transfer Return information contained on this website.

4. Must agree to maintain confidentiality

Retrieve Monthly Returns

Home Manage users Help Quit

New to the site? If so, click Help in the menu bar above.

Welcome Russ Reppen: Systems Administrator

Access electronic transfer returns by:

- [Date recorded](#)
- [Date of posting](#)
- [County document ID](#)
- [County/Municipality](#)

1. Select County/
Municipality for monthly
download

Home Help

Browse history
Reselect county > Jefferson

Select county or municipality
(County)
[Aztalan, Town of](#)
[Cambridge, Village of](#)
[Cold Spring, Town of](#)
[Concord, Town of](#)
[Farmington, Town of](#)
[Fort Atkinson, City of](#)

2. Select (County)

Home Help

Browse history
Reselect county > Jefferson > (County)

Select year
[2006](#)
[2007](#)
[2008](#)
[2009](#)
[2010](#)

3. Select Year

Home Help

Browse history
Reselect county > Jefferson > (County) > 2010

Select year to date returns or by month

00 Year-to-date	Download
01 January	Download
02 February	Download
03 March	Download
04 April	Download

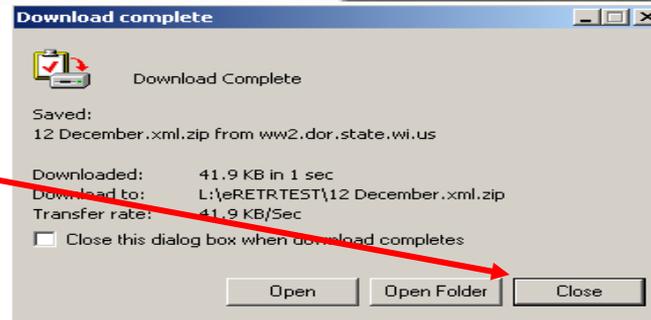
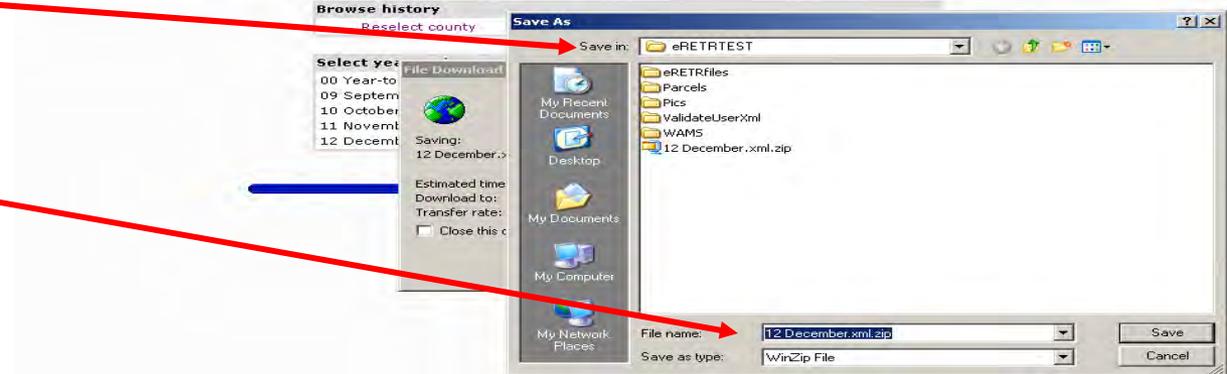
4. Select Month by
clicking on Download

Download Monthly File

1. Select directory

2. Save (note name saves as month selected)

3. Download complete (new window) close



4. Finished with web page: Quit

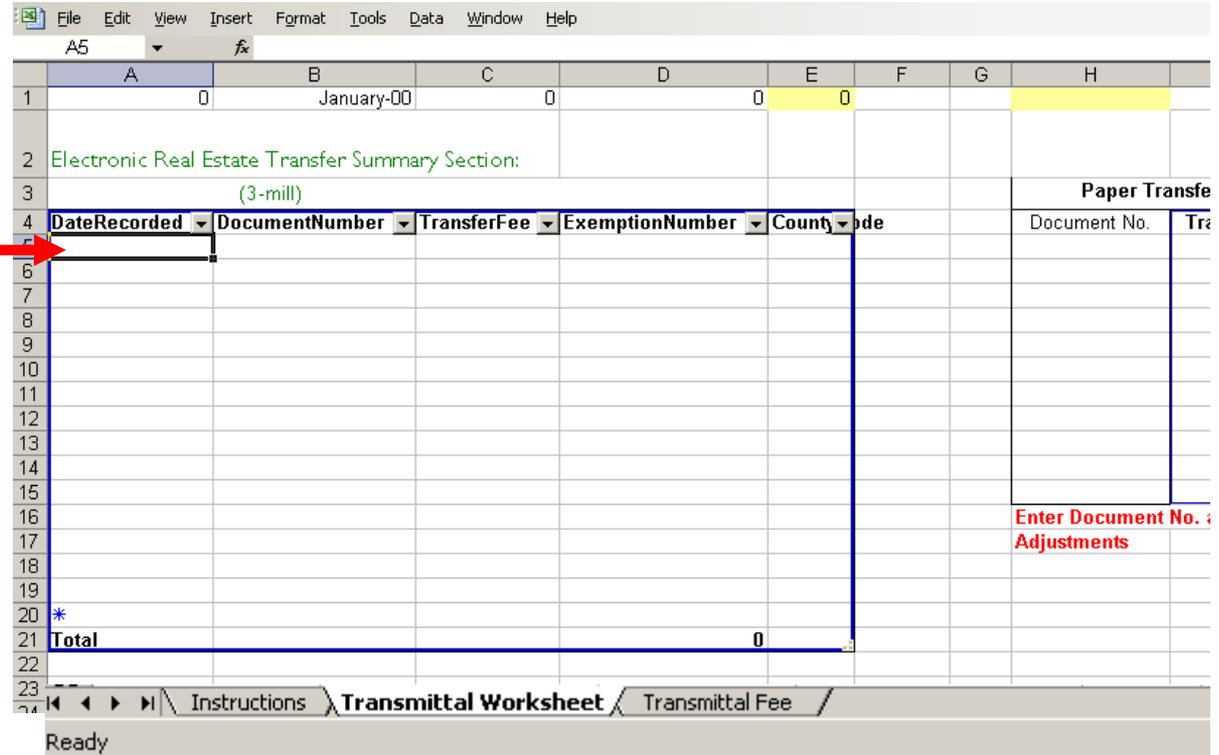


Open Treasurer's Transmittal Spreadsheet Template in Excel

Transmittal Worksheet page

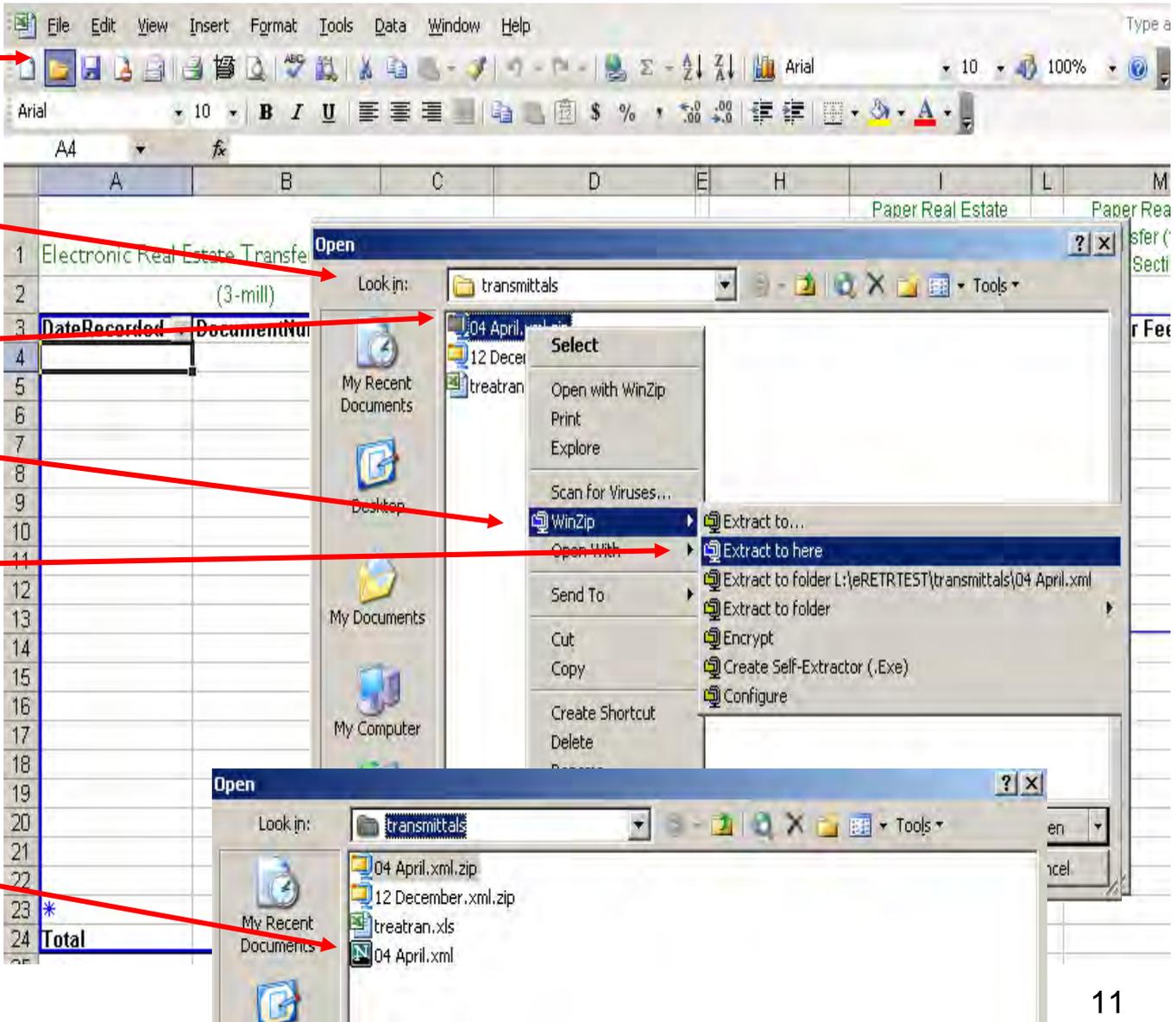
Need Excel 2003 Professional or newer

Place cursor in first cell under Date Recorded - Cell A5



Locate Zipped File - XML Conversion

- 1. Click on Open
- 2. Locate folder where zip file was saved
- 3. Right click on zipped file
- 4. Arrow over WinZip
- 5. Click on Extract to here
- 6. File is now saved in same folder with same name as xml file instead of xml.zip



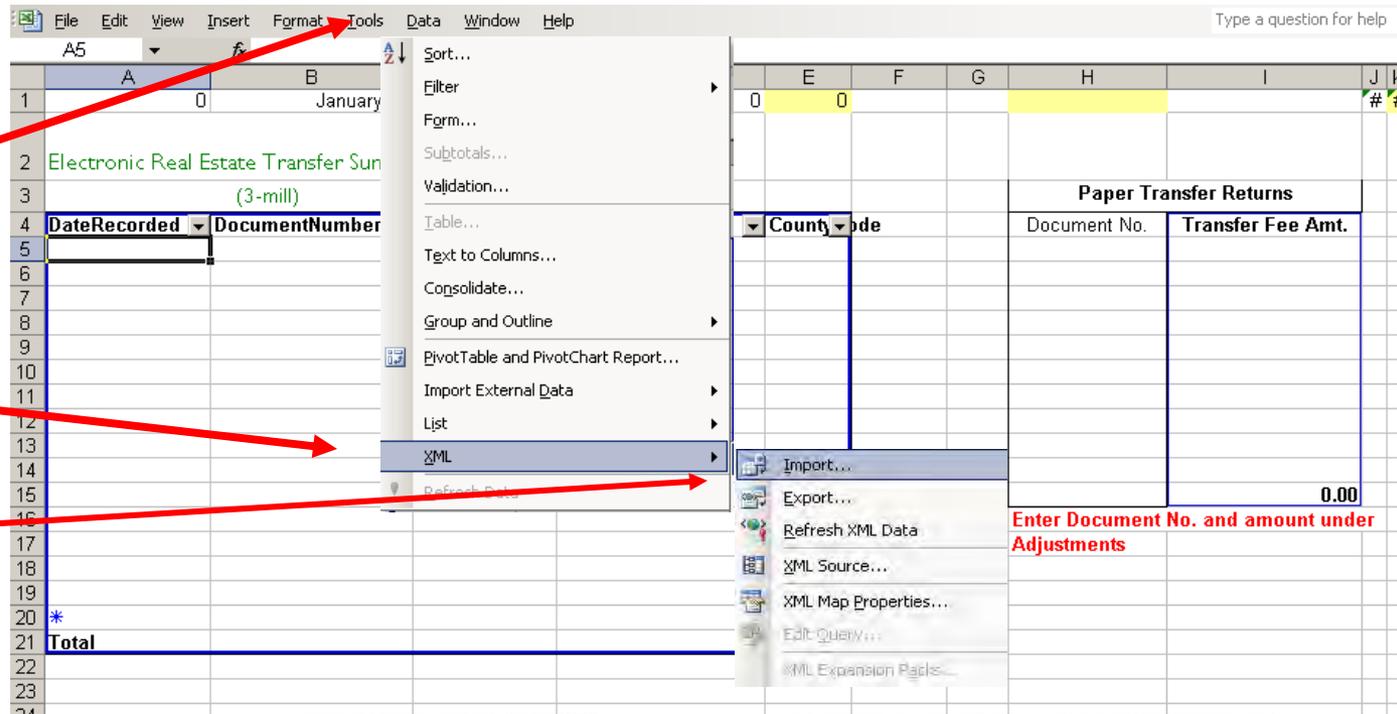
Import XML Monthly File

1. Place cursor in cell under Date Recorded - Cell A5

2. Click on Data

3. Arrow over XML

4. Click on Import



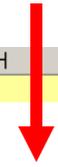
5. Double click on saved monthly XML File



Result of Import to Transmittal Worksheet

1. Enter any paper PE-500 received with a Waiver
2. Enter total fee amount here
3. If exempt from fee, enter 0
4. Enter Doc. # & 80% of fee on Transmittal Adjustment line 6

	A	B	C	D	E	F	G	H	I
1	30	April-10	14	10	24				
2	Electronic Real Estate Transfer Summary Section:								
3	(3-mill)								
4	DateRecorded	DocumentNumber	TransferFee	ExemptionNumber	CountyCode			Paper Transfer Returns	
5	4/1/2010	1614218	249		30			Document No.	Transfer Fee Amt.
6	4/1/2010	1614226	0	14	30				
7	4/1/2010	1614225	0	14	30				
8	4/1/2010	1614224	0	14	30				
9	4/1/2010	1614222	0	14	30				
10	4/1/2010	1614223	2025		30				
11	4/1/2010	1614220	825		30				
12	4/1/2010	1614231	405.3		30				
13	4/1/2010	1614287	248.1		30				
14	4/1/2010	1614283	0	16	30				
15	4/1/2010	1614272	622.5		30				0.0
16	4/1/2010	1614262	279		30			Enter Document No. and amount un	
17	4/1/2010	1614243	465		30			Adjustments	
18	4/23/2010	1615927	195		30				
19	4/26/2010	1615968	363.9		30				
20	4/26/2010	1615970	570		30				
21	4/26/2010	1615984	0	15s	30				
22	4/26/2010	1615985	315		30				
23	4/26/2010	1616005	0	14	30				
24	4/26/2010	1616007	0	14	30				



Result to Transmittal Fee Page

A	B	C	D	E	F	G	H	I
2		REAL ESTATE TRANSFER FEE TRANSMITTAL						
3	<u>County Name</u>	<u>County Code</u>	<u>Reporting collections for Month of</u>					
4	<input type="text"/>		30	April-10				
5								
6								
7								
8	1	Number of returns with a fee		14				
9	2	Number of returns without a fee		10				
10	3	TOTAL RETURNS		24				
11	4	Fees collected by COUNTY		\$7,087.50				
12	5	STATE share of fees collected (80%)		\$ 5,670.00				
13								
15		Adjustments (explain each, Enter Doc. #)						
16		<input type="text"/>						
17		<input type="text"/>						
18		<input type="text"/>						
19		<input type="text"/>						
20		<input type="text"/>						
21	6	Total adjustments		\$ -				
23	7	Net due Dept. of Revenue		\$ 5,670.00				
24				Total Lines 5+6				
25		<u>Name and address of preparer</u>					<u>Title</u>	
26		<input type="text"/>						
27							<u>Telephone Number</u>	
28							<input type="text"/>	
29		<u>E-mail address</u>					<u>Date prepared</u>	
30		<input type="text"/>					<input type="text"/>	
31								
32		State law (s. 77.24) requires county treasurers to remit the fees and returns to the department by the 15th day of the						
33		month following the close of the month in which the fees were collected.						
34		a. E-mail this Real Estate Transfer Fee Transmittal (P-520) and spreadsheet to:					utility@revenue.wi.gov	
35								
36		b. Make payment via MYtaxACCOUNT					http://www.revenue.wi.gov	
37								
38								
39								
40		P-520 (R.4/2010)						

1. Enter County



2. Adjustment Lines:
Enter any paper PE-500 Doc. # & only 80% of fee from Worksheet. If exempt from fee, enter 0

3. Complete preparer information



Save Completed Monthly Transmittal

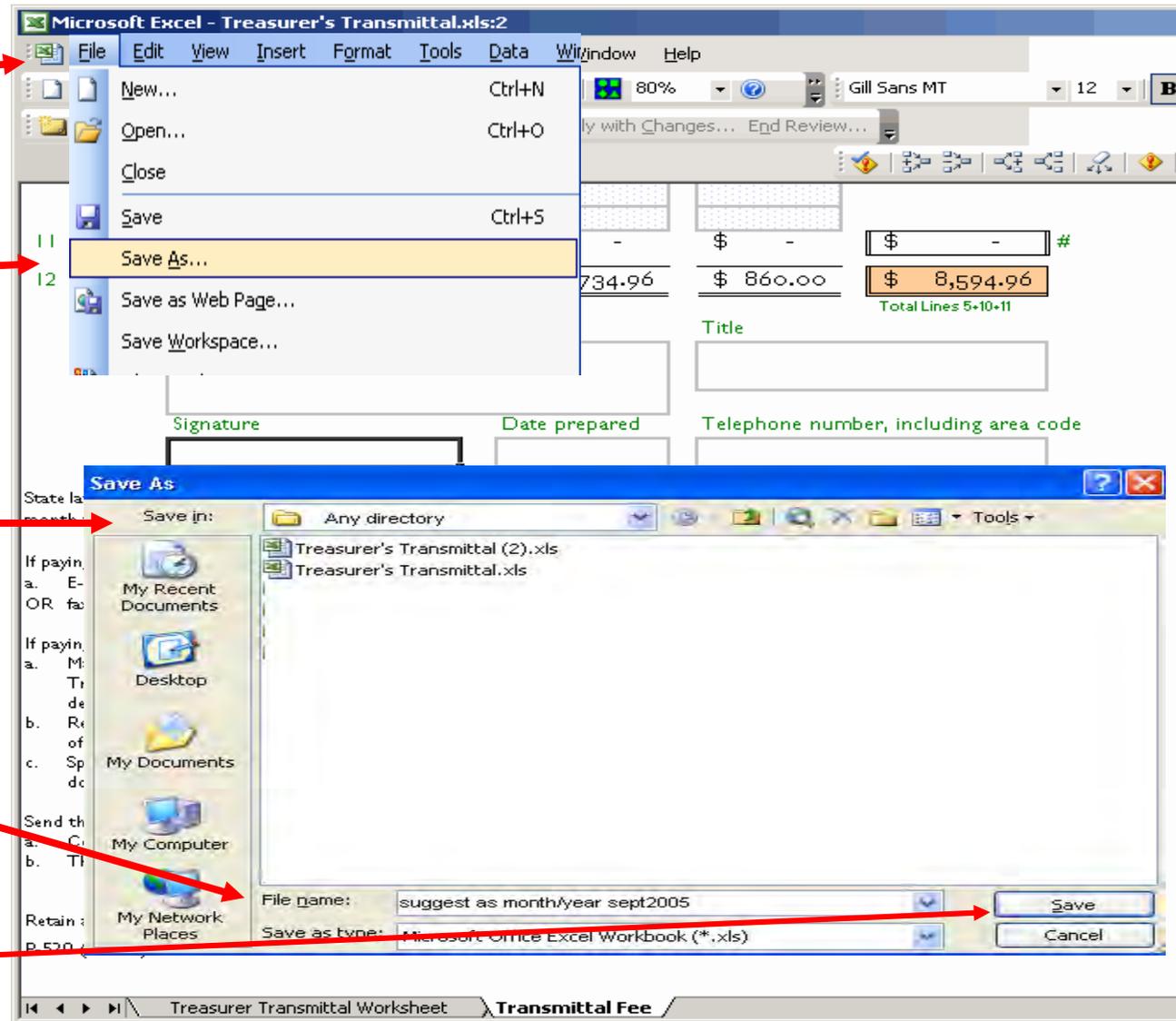
1. Click on File

2. Save As

3. Any directory you select

4. Name file.
Recommend naming it as month & year report is for

5. Save



E-Mail Transmittal To Revenue

DO NOT PRINT & MAIL

25	Name and address of preparer	Title
26		
27		Telephone Number
28		
29	E-mail address	Date prepared
30		
31		

32 State law (s. 77.24) requires county treasurers to remit the fees and returns to the department by the 15th day of the
33 month following the close of the month in which the fees were collected.

34 a. E-mail this Real Estate Transfer Fee Transmittal (P-520) and spreadsheet to:

utility@revenue.wi.gov

36 b. Make payment via **MYtaxACCOUNT**

<http://www.revenue.wi.gov>

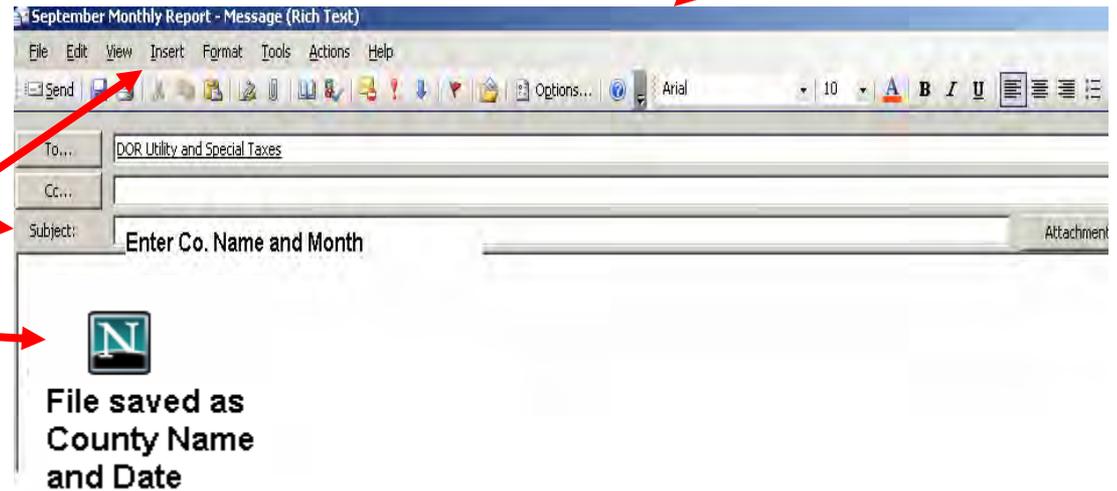
40 P-520 (R.4/2010)

1. Click on E-mail address, opens up your e-mail

2. Add County Name & Month to subject line

3. Insert saved monthly file

4. Send



Payment via MY *tax* ACCOUNT

1. Payments must be made via MY *tax* ACCOUNT
2. Same method for withholding & sales tax
3. Use eRETR WAMS ID & password

25	Name and address of preparer	Title
26	<input type="text"/>	<input type="text"/>
27		Telephone Number
28		<input type="text"/>
29	E-mail address	Date prepared
30	<input type="text"/>	<input type="text"/>
31		

32 State law (s. 77.24) requires county treasurers to remit the fees and returns to the department by the 15th day of the
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<http://www.revenue.wi.gov>

Click on link to
DOR Homepage

40 P-520 (R.4/2010)

The screenshot shows the Wisconsin Department of Revenue website. The header includes the logo and the text "Wisconsin Department of Revenue" and "revenue.wi.gov". Below the header is a navigation menu with links for "Contact Us", "Online Services", "Employment", "En Español", "FAQs", "Forms", "Links", "News", "Publications", and "Reports". The main content area is divided into three columns. The first column is for "INDIVIDUALS" and features a "WI efile" logo, a link to "File Your Tax Return - Free", a "PAY ONLINE" link, and a "Need Help? Watch Our Videos" link. The second column is for "BUSINESS/GOVERNMENTS" and features a "MY tax ACCOUNT" section with a "LOGIN" button, an "IMPORTANT TIPS" link, and a "Need Help? Watch My Tax Account Videos" link. The third column is for "eRETR" and features a "File Your Real Estate Transfer Return | Search Record" link and a "NEWS" section with several news items. A red arrow points from the "Click on link to DOR Homepage" text to the "http://www.revenue.wi.gov" link. Another red arrow points from the "Click on 'IMPORTANT TIPS' or watch Videos for help" text to the "IMPORTANT TIPS" link in the "MY tax ACCOUNT" section.

4/30/10

Click on "IMPORTANT TIPS" or watch Videos for help

17

CONGRATULATIONS!

- You have just successfully completed & submitted the Monthly Real Estate Transfer Fee Transmittal
- Thank you for using eRETR Real Estate Transfer Fee Transmittal
- If you created a Transfer Fee Transmittal template by following Screens 3 & 4, begin next month on Screen 4