

# My Tax Account User Guide

Individuals with Personal Past Due Balances

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This guide is for new *My Tax Account* users wishing to create a *My Tax Account* profile to manage their personal past due balance owed. Business entities and third party preparers should see our [Getting Started with My Tax Account](#) FAQ for help registering.

To maximize the features available to you in My Tax Account we recommend you create separate professional and personal profiles to ensure the privacy and separation between business and personal tax accounts.

## What is *My Tax Account*?

*My Tax Account* is the free online tax system from the Wisconsin Department of Revenue (DOR) for managing professional and personal tax information. *My Tax Account* allows you to:

- View current account status
- View letters (not accessible by third-parties)
- Make and view payments
- Manage and update account information
- File an appeal
- Check on your refund status (Personal Only)
- View your 1099-G (Personal Only)
- File and amend returns (Businesses/Employers Only)
- Remit wage attachment payments (Businesses/Employers Only)

It's simple, secure and available 24 hours a day, seven days a week.

**The security of your data is of utmost importance to us.** There are multiple layers of security within *My Tax Account* to protect your data. You can maintain this security by doing the following:

- Do not provide your username or password to anyone else.
- Change your password regularly.
- After completing your transactions, always log off and close your web browser.

**IMPORTANT:** The first user to request access automatically receives 'Master' level access. All other users will receive 'Account Manager' access. The user with 'Master' access will manage the access of all 'Account Manager' users and third party preparers. Only Master level users have access to full balance information and customer rather than account specific mail items.

To ensure that you obtain 'Master' account access we suggest you promptly set up a user account for yourself or entity and DO NOT share your letter(s) with parties other than the intended recipient(s).

# Getting Started Tips

## *Tip 1: Use the help features*

As you navigate in *My Tax Account*, you'll see gray boxes at the top or right side of the screen. These boxes have general tips for the screen you're on.

When you're completing a return, you'll see links to instructions and common questions in the upper right.

Click a blue circle with a question mark for help information specific to that field.

If an entry field is red, there is an error. Hover over the field for a brief description of the error.

If an entry field is yellow, it's a required field.

From every screen, you can click below the *My Tax Account* icon in the upper left to link to common questions.

## *Tip 2: Prepare your computer*

Make sure your web browser is updated.

To avoid issues with *My Tax Account*, use the following minimum versions, of these web browsers:

- Microsoft Edge
- Microsoft Internet Explorer 9
- Safari 5
- Chrome 31
- Firefox 3.5
- Opera 10

Since *My Tax Account* opens new browser windows for some functions, you may want to disable the popup blocker on your browser when using the program.

You may also need an up-to-date version of Adobe Acrobat Reader to view PDFs in *My Tax Account*.

## *Tip 3: Follow the steps and let us do the math for you.*

*My Tax Account* forms are similar to the paper forms you may already be familiar with. Amounts due and other calculations appear as you enter information. For longer forms, additional steps appear if needed. Simply click the step link to enter information.

## *Tip 4: Use the menu on the left and the tabs in the middle of your screen.*

The panel on the left has action buttons that change depending on the screen you're on. Look here to submit returns and payments, confirm information and add attachments. There are also tabs across the middle of the screen. Here you'll see third party accounts, pending requests, and many other items.

# New User Registration Process

NOTE: If you want a third party preparer to manage your personal accounts, have them go to the [Getting Started with My Tax Account](#) FAQ for registration instructions.

To set up your personal *My Tax Account*, follow the instructions to get started managing your personal past due balance owed and/or filing. See our [Getting Started with My Tax Account](#) FAQ for help registering business entities.

## Create your My Tax Account Logon

Open the Revenue Home page ([revenue.wi.gov](http://revenue.wi.gov)) and click on the **My Tax Account** Button under Online Services.



Click **New User? Create new username.**

A screenshot of the 'MY tax ACCOUNT - For Business Taxes' login page. The page has a header with the title. Below it is a 'LOGIN' section with fields for 'Username', 'Password', and 'Authorization/Security Code'. There are links for 'Forgot my username' and 'Forgot my password'. A 'Log In' button is present, along with a 'Remember my computer' checkbox. A red rectangle highlights the link 'New User? Create new username'. To the right of the login fields is a 'WHAT YOU SHOULD KNOW' section with links like 'What taxes can I file/pay?', 'Getting started', and 'Security code and log in'. Below that is a 'VIDEOS' section with links to 'Unlocking your account', 'Overview', 'Registration', 'Sales and Use Tax', 'Withholding Tax', and 'Other Payments'. At the bottom right is a 'MORE INFORMATION' section with links to 'Upcoming Training Webinar - Register Now', 'Using My Tax Account', 'Troubleshooting tips', 'Wage attachment payments', 'Tax Refund Intercept Program (TRIP)', and 'Contact us'. At the bottom, there is a 'Go to our website:' section with links for 'Individuals', 'Businesses', and 'Governments'. A video player with a play button is visible on the left side of the page.

## Enter Profile Info

### Click **Step 1: Enter Profile Info**

Each *My Tax Account* user needs his or her own username. Enter a unique username, password and profile email address.

The security of your data is of utmost importance to us. There are multiple layers of security within *My Tax Account* to protect your data. You can help maintain this security by doing the following:

- Do not provide your username or password to anyone else
- Change your password regularly
- After completing your transactions, always log off and close your web browser

Create your username and password using the guidelines in the right hand help box.

You must use a valid email address to access *My Tax Account*.

Summary

Welcome to My Tax Account Registration

➔ Step 1: Enter Profile Info

**Create Profile**

Username  Required

Password  Required

Confirm Your Password  Required

Profile Email Address  Required

Confirm Your Profile Email Address  Required

First and Last Name  Required

Country  Type  Required Phone #  Required

Select a Secret Question  Required

Secret Question Answer  Required

Confirm Secret Question Answer  Required

Are You a 3rd Party Preparer?  Required

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

**Required**  
Your password must be between 8-20 characters and must contain a combination of letters and numbers. Passwords are case sensitive and cannot contain your username.

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

OK Cancel

Unless you are managing someone else's account, select "No" to the "Are you a third party preparer" question.

Click **OK** in the lower right hand corner when completed.

## Enter Customer Information

Click **Step 2: Enter Customer Information**

Summary

Welcome to My Tax Account Registration

Step 1: Enter Profile Info

Username: NewUserName

Profile Email: myemail@gmail.com

3rd Party Preparer: No

➔ Step 2: Enter Customer Information

Enter your identification number, name and zip code as it appears on the letter you received from the Department of Revenue asking you to set up your *My Tax Account*.

Acceptable identification numbers include: Federal Employer ID number, Social Security number, Taxpayer ID number (ITIN), or Wisconsin Tax Number (WTN).

My Tax Account has two levels of access: Master and Account Manager. The first user to complete an access request for a business automatically receives 'Master' access. All other users who request access for the business will receive 'Account Manager' access. The 'Master' can manage access for all 'Account Managers'.

**Customer Access Request**  
Complete the fields below to request access

1. Select Id Type
2. Enter Id Number  Required
3. Enter Customer Last or Business Name  Required
4. Enter Customer Zip Code  Required

OK Cancel

Click **OK** in the lower right hand corner when completed.

## Submit Registration

The screenshot shows the 'Summary' page of the 'About My Tax Account' registration process. On the left is a blue sidebar with a 'Menu' (Home, Back) and a 'WIS' section (RunDate: 01-Feb-2017, Submit, Cancel). The main content area is titled 'Welcome to My Tax Account Registration' and shows a progress bar with four steps. Step 1 (Enter Profile Info) is completed, showing fields for Username (NewUserName), Profile Email (myemail@gmail.com), and 3rd Party Preparer (No). Step 2 (Enter Customer Information) is also completed, showing Social Security Number (\*\*\*-\*\*-9339). Step 3 (Add Access to Accounts (Optional)) is the current step, with instructions to complete it if you are an active business customer, an individual registering a collection account, a third-party preparer, a state agency, or making utility/real estate payments. Step 4 (Complete your registration) is the final step, instructing the user to click the SUBMIT button in the blue panel on the left.

Verify the information on the summary screen.

Click **Submit** in the blue panel on the left.

A modal dialog box with a blue header and a close button (X). The text inside reads: 'Each My Tax Account user is required to hold their own username and password. Do not share your My Tax Account username with anyone including a co-worker. To complete My Tax Account registration, click AGREE.' At the bottom right are two buttons: 'Agree' and 'Cancel'.

Click **Agree** to complete the registration process.

The confirmation page has a blue header with 'CONFIRMATION' and a 'Printable View' link. The main text says: 'Thank you for registering for My Tax Account. Your confirmation number is 0-471-835-840. Please keep this for your records. You will receive an email confirmation from the Wisconsin Department of Revenue that includes an authorization code. You will need this authorization code the first time you login to My Tax Account.' At the bottom is a 'Printable View' button.

The confirmation page confirms submission of your registration. You will also receive an email confirmation that includes an authorization code you will need to log in the first time.

**\*\*THIS IS AN AUTOMATED MESSAGE. PLEASE DO NOT REPLY TO THIS EMAIL.\*\***

Your request for access to *My Tax Account* has been processed.

Your authorization code is **jsfw5b.**  
You must enter this authorization code to log into *My Tax Account*.

To protect your tax information, do not share your username or password information with others. This could allow unauthorized access to your accounts. It is easy to create your own individual MTA username and password and request access to another person's account with their permission. If you have questions and would like further assistance, please contact the department at [DORMyTaxAccountHelp@wisconsin.gov](mailto:DORMyTaxAccountHelp@wisconsin.gov).

## Enter Security Contact Information

This step asks you to add security contact information. We do this for added protection of your information because My Tax Account will send you a security code as part of the login process.

Log into My Tax Account. Enter your username, password and the authorization code from the email.

**LOGIN**

Username [Forgot my username](#)  
\*\*\*\*\*

Password [Forgot my password](#)  
\*\*\*\*\*

Authorization/Security Code  
**jsfw5b**

☐ Remember my computer

[New User? Create new username](#)

**WHAT YOU SHOULD KNOW**

- [What taxes can I file/pay?](#)
- [Getting started](#)
- [Security code and log in](#)

**VIDEOS**

- [Unlocking your account](#)
- [Overview](#)
- [Registration](#)
- [Sales and Use Tax](#)
- [Withholding Tax](#)
- [Other Payments](#)

**MORE INFORMATION**

### **Click Log In**

You will now be asked to add a Security Contact cell number or email address. Make sure you can access these to get the security code My Tax Account will send you each time you log in.



**PROFILE INFORMATION REQUIRED**

Username

NewUserName

Country

USA

Type

Business

Name

User Name

Phone 1

Extension

Profile Email

myemail@gmail.com

Country

USA

Type

Secret Question

In what city did you meet your spouse/significant

Phone 2

New Question

In what city did you meet your spouse/significant

Answer

\*\*\*\*\*

Confirm

\*\*\*\*\*

**SECURITY CONTACT**

☐ Send Security Code by Text

Country

USA

☐ Send Security Code by Email

Cellular Carrier

Required

☒ Send Security Code by Text or Email

Cell Phone

Required

Security Email

Required

**What you should know:**

- You must add a Security Contact cell number or email address because My Tax Account sends you a security code as part of the login process
- Security Contact email and/or cell phone may be different from your Profile Information
- Your Security Contact email can be used for multiple My Tax Accounts
- If your cellular carrier is not listed, select email option
- Standard message and data rates may apply if text option selected

**OPTIONS FOR MAIL DELIVERY**

☒ Enable for All

☐ Enable for Specific Accounts

☐ Turn Off Electronic Mail Delivery

**Terms and Conditions for Electronic Delivery of Notices and Other Mail**

You are electing to receive notices and other mail from the Wisconsin Department of Revenue through *My Tax Account*. This election means that some notices will not be delivered by the US Postal Service. The Wisconsin Department of Revenue will send you an email to alert you to new notices and other mail available for viewing in *My Tax Account*.

- I agree to keep my email address current so that I receive alerts.
- I agree to login in to *My Tax Account* to read my notices and other mail.
- I understand that some notices offer appeal rights and that I may have 60 days from the day the notice is posted to *My Tax Account* to appeal the notice.
- I agree to check *My Tax Account* periodically (at least monthly) for new notices and other mail.

☒ I agree to these Terms and Conditions for Electronic Delivery of Notices and Other Mail

**Profile Information Required:** This section summarizes the data provided in your registration. You can make changes if you want but nothing is required.

**Security Contact:** Update the method that should be used to deliver the security code required to log on in the future.

**Options for Mail Delivery:** The default selection is to receive notices and other mail from the Department of Revenue through *My Tax Account* rather than by U.S mail. You may change the default here. If you later decide to change your selection, you may do so by updating your profile. The Master user can Enable for All. Account Managers can Enable only for the specific accounts they are authorized for.

**Terms and Conditions for Electronic Delivery of Notices and Other Mail:** Check the box to agree to the terms and conditions or Turn Off Electronic Mail Delivery under Options for Mail Delivery.

Click **Save** in the blue panel on the left.

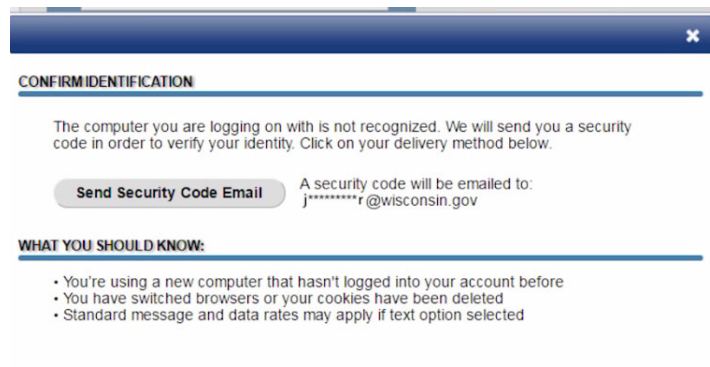
You have now set up your profile, contact information and security information.

**Log off** to start the next process of setting up your accounts.

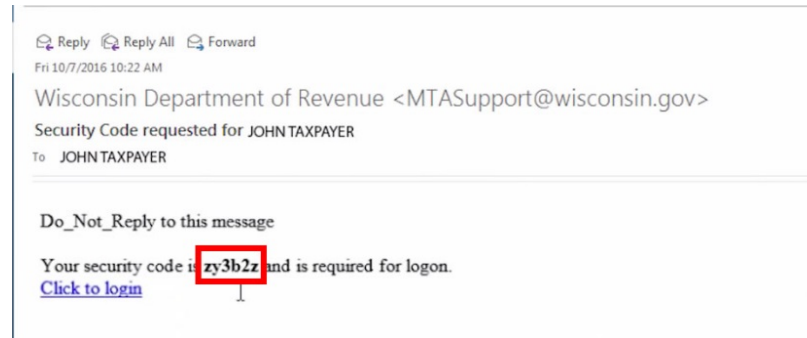
## [Log in to Add Access to your Accounts](#)

Login into My Tax Account. Enter your username and password and click **Log In**.

You will be prompted to request a security code by the text or email that you added to your Security Contact.



It could take several minutes for the text or email to arrive.



Once you receive the security code, enter the six character code into the Authorization Security Code field on the login screen. Remember, a security code is only good once.

**Tip:** Check the "Remember My Computer" box to avoid requesting a security code each time you log in on this computer. However, if you log in for the first time with another browser or another computer, you need a new security code.

Click **Log In**.

You will now be able to set up full access to your accounts.

From the I WANT TO... menu in the upper right hand corner, select **Add Access to an Account**.

Select access type:

#### Register Personal Accounts

You must have your Social Security Number and a letter ID from a notice (Notice of Overdue Tax or Notice of Referred Debt), or your collection ID from your Statement of Account.

- Individual Income Tax
- Homestead
- Referred Debt
  - SDC Municipalities – utilities, property taxes, fines, ambulance bills, fire/rescue
  - SDC – Restitution – court debt owed to a crime victim
  - SDC – State Agencies – tuition, court fines and fees, transportation, workforce development, worker's compensation, military

#### Register Professional Accounts

- Click to view a complete list of business tax or other collection accounts.

#### Wage Attachment Payments

- Employers who have received a wage attachment order from the Wisconsin Department of Revenue to submit amounts withheld from an employee's paycheck.

Select **Register Personal Accounts** to add access to your personal account with a balance due.

You must have your Social Security number. Refer to the letter you received from DOR. You may have received one of the following letters:

- Letter ID from a Notice of Overdue Tax
- Letter ID from a Notice of Referred Debt
- Your collection ID from your Statement of Account

Refer to the letter to select the tax account type. Options include:

- Homestead
- Individual Income Tax
- Lottery
- Miscellaneous Debts/Fees
- SDC-Municipalities
- SDC-Restitution
- SDC-State Agencies
- SLF Manufacturing Penalty

The following accounts will be automatically added to your profile when any other account type is added:

- Miscellaneous Debts/Fees
- Non-Registered Consumer Use
- Occasional Consumer Use

Revenue

About My Tax Account

Menu Log Off

Home  
Back

WIS

RunDate: 09-Feb-2017

### Individual Tax Account

Individual Accounts

1. Select Tax Account Type Miscellaneous Debts/Fees

Social Security Number Required

**AND**

Enter letter ID from Notice of Overdue Tax, Notice of Referred Debt or Notice of Amount Due Required

**OR**

Enter Collection Case from Statement of Account Required

Required

After selecting the tax account type to add, enter your social security number and one of the following included in the letter:

- Letter ID from a Notice of Overdue Tax
- Letter ID from a Notice of Referred Debt
- Letter ID from a Notice of Amount Due
- Collection Case number from a Statement of Account

Click **Submit** in the blue panel on the left.

Repeat for each additional tax account you want to add to your profile.

You can now manage your account. Your "I Want To..." options are customized for your account. You can do things like pay toward your collection balance, view your payment details, and more.