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 and 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

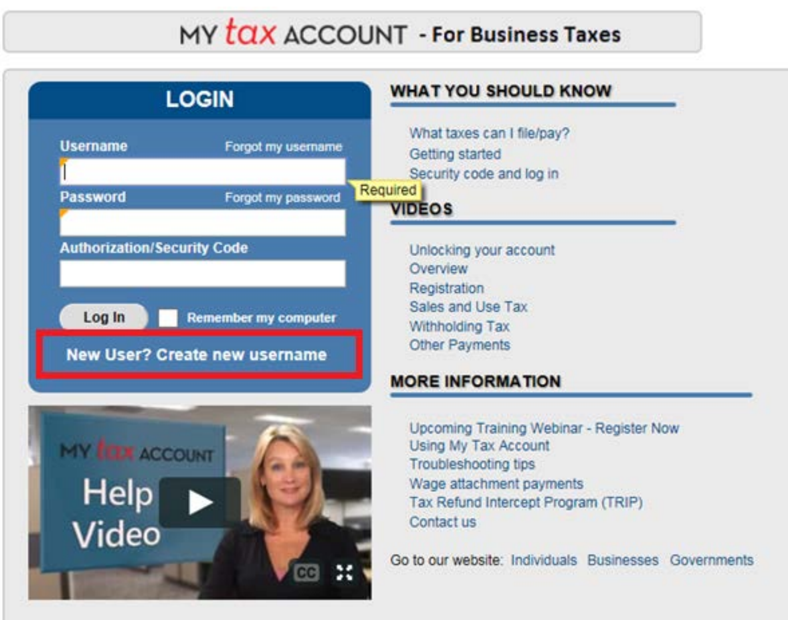
NOTE: If you want a third party preparer to manage your personal accounts, have them go to the Getting Started with *My Tax Account* FAQ for registration instructions.

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) and click on the ***My Tax Account*** Button under Online Services.

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



Enter Profile Info

Click **Step 1: Enter Profile Info**

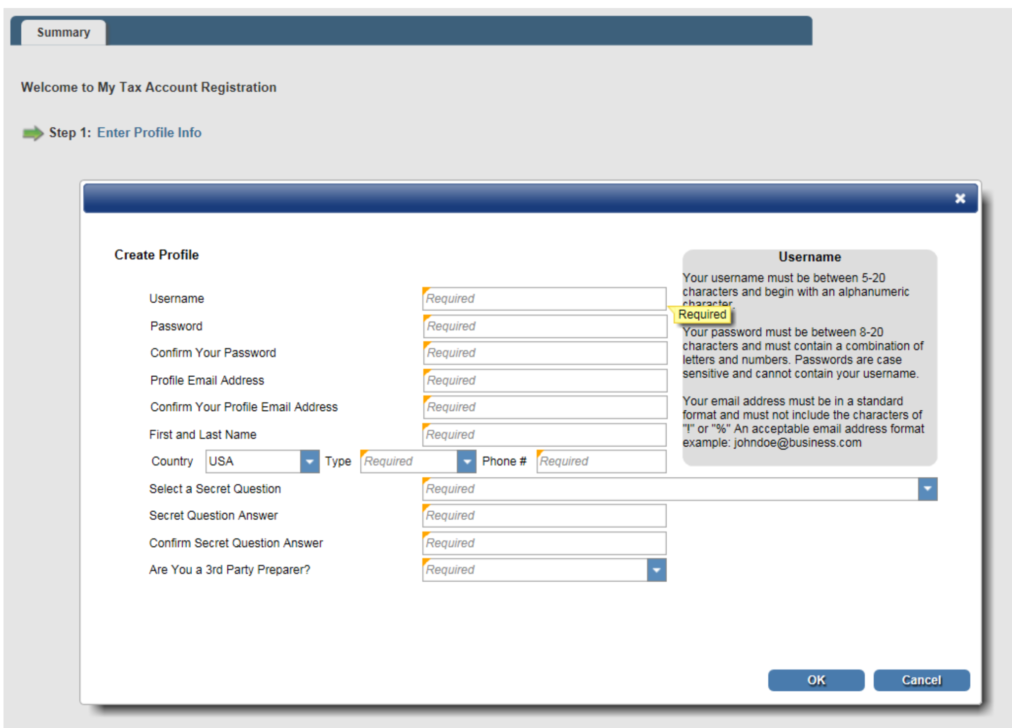
Each *My Tax Account* user needs his or her own username. Enter a unique username, password and profile email address.

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.*

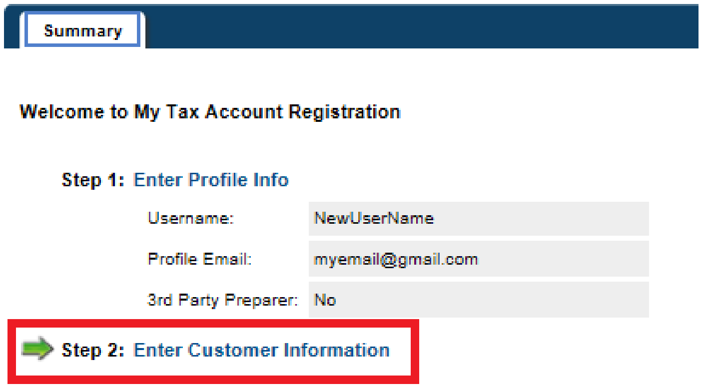


Unless you are managing someone else's account, select "No" to the "Are you a third party preparer" question.

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

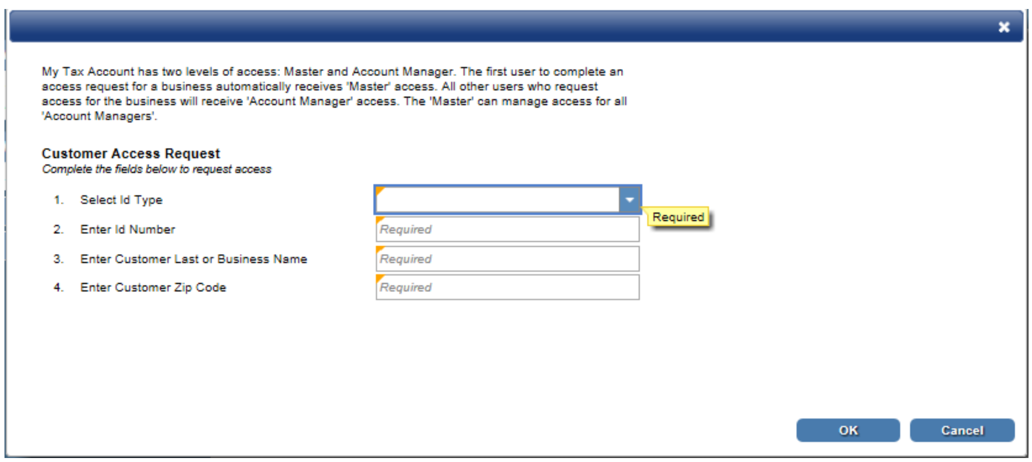
Enter Customer Information

Click **Step 2: Enter Customer Information**



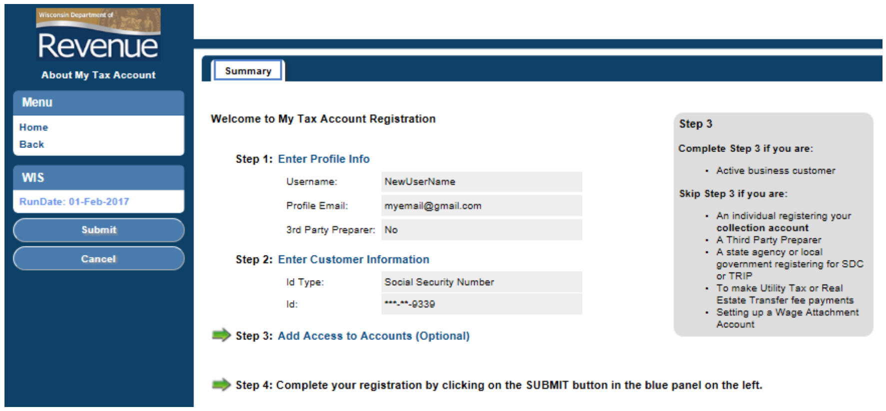
Enter your identification number, name and zip code as it appears on the letter you received from the Department of Revenue asking you to set up your *My Tax Account*.

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



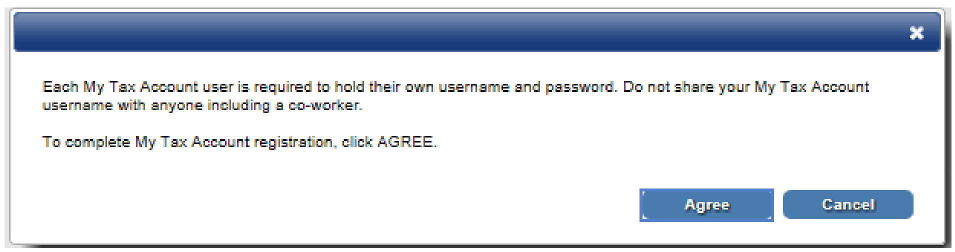
Click **OK** in the lower right hand corner when completed.

Submit Registration

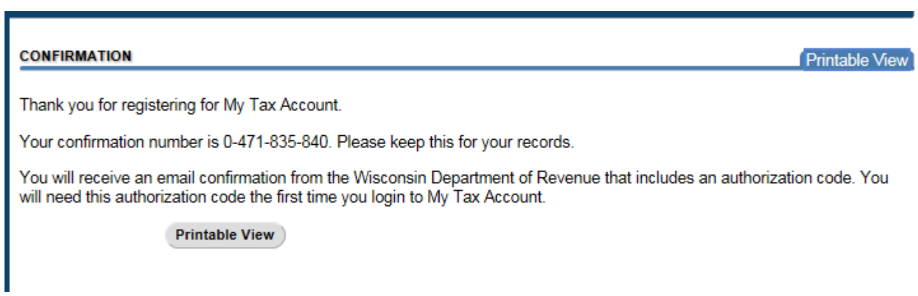


Verify the information on the summary screen.

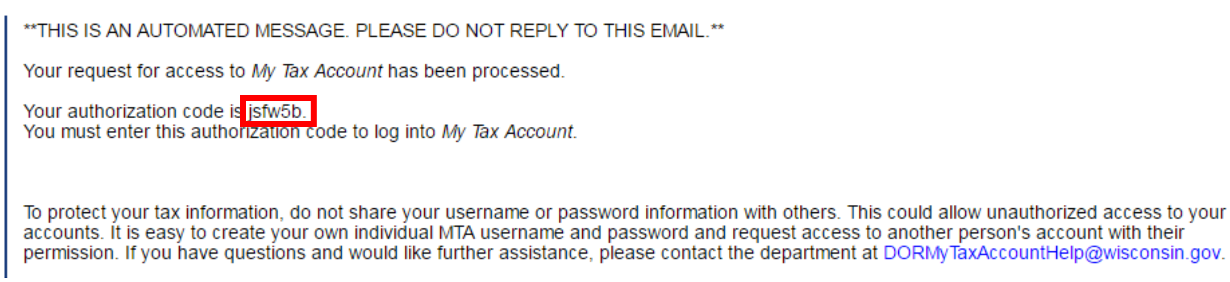
Click **Submit** in the blue panel on the left.



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



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.

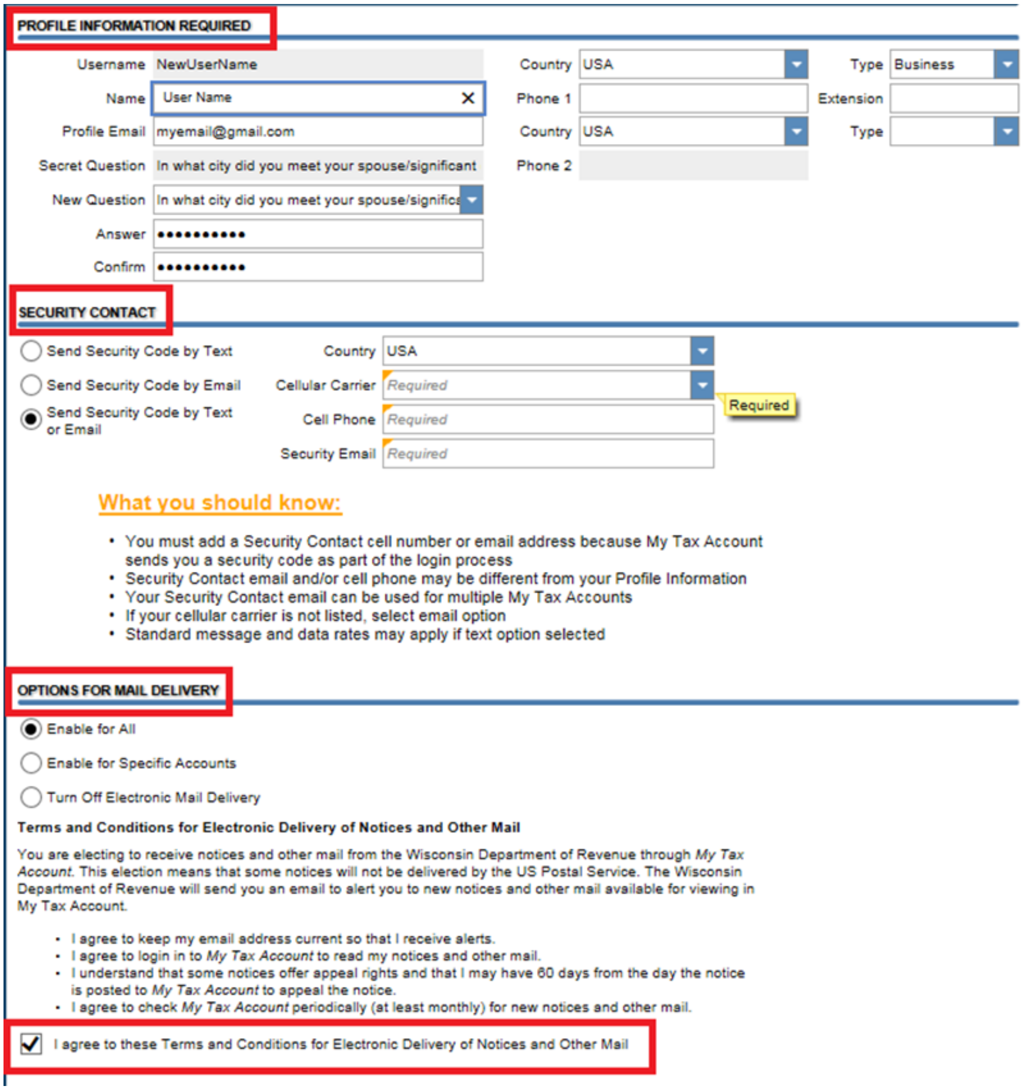
Enter Security Contact Information

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.

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: 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.

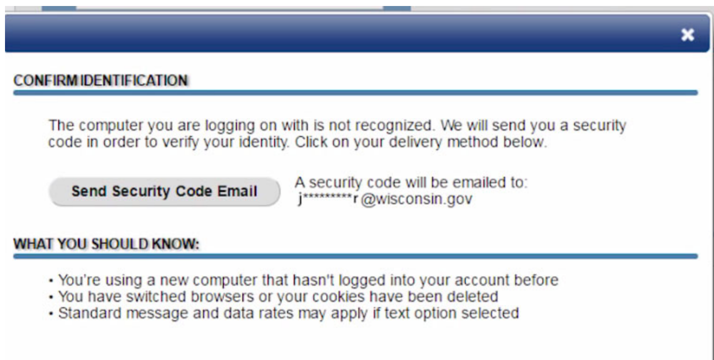
You have now set up your profile, contact information and security information.

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

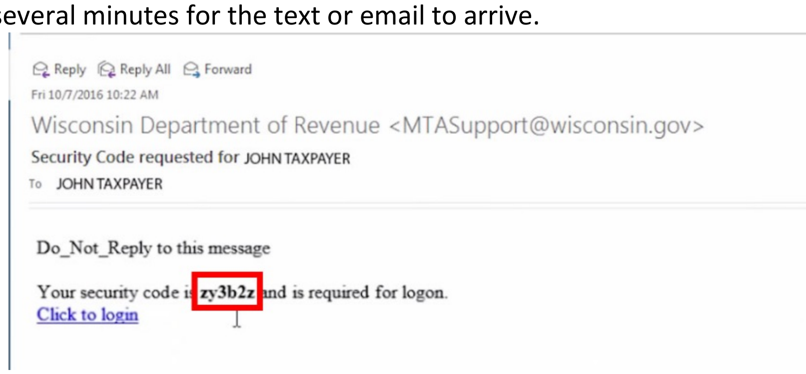
Log in to Add Access to your Accounts

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

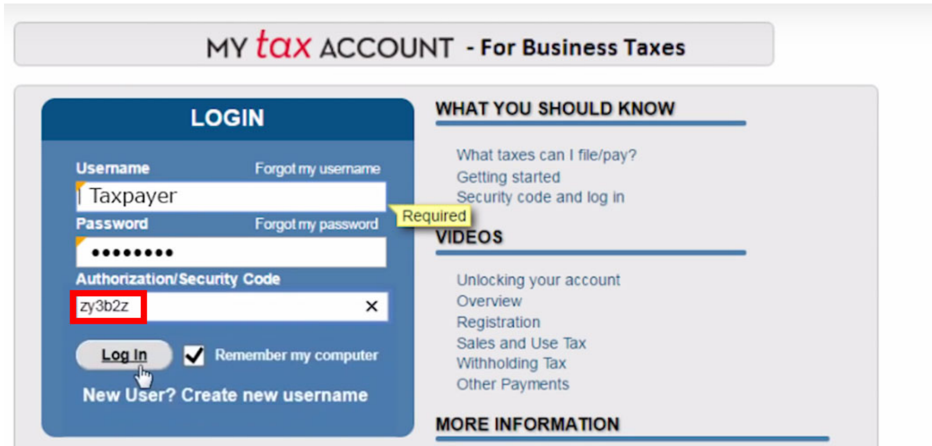
You will be prompted to request a security code by the text or email that you added to your Security Contact.



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.

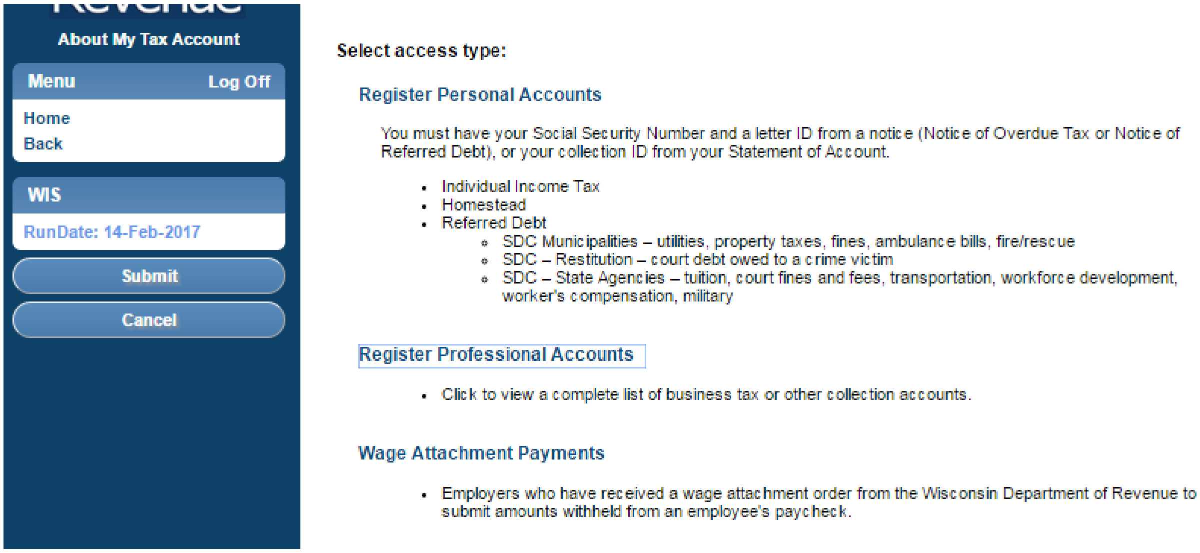


Tip: Check the "Remember My Computer" box to avoid requesting a security code each time you log in on this computer. However, if you log in for the first time with another browser or another computer, you need a new security code.

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 **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:

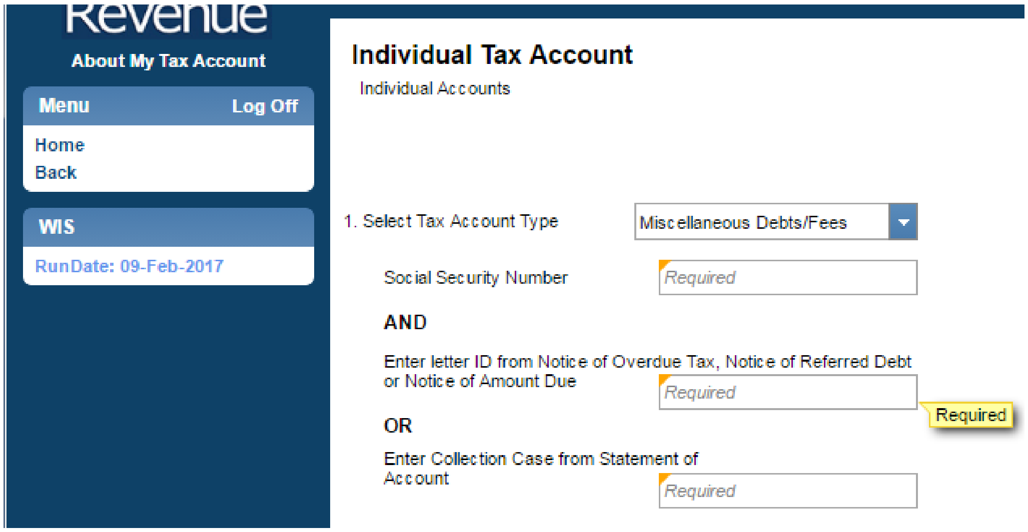
- Letter ID from a Notice of Overdue Tax
- Letter ID from a Notice of Referred Debt
- Your collection ID from your Statement of Account

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



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.