

My DOR Government Account is an electronic filing system for local government officials and other representatives to file required forms with the Wisconsin Department of Revenue (DOR).

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# 1. Getting Started

## A. How do I access My DOR Government Account?

You can access My DOR Government Account (MyDORGov) from the Government's landing page of the Wisconsin Department of Revenue's (DOR) website: <u>revenue.wi.gov/Pages/Governments/home.aspx</u>.

- Click the "My DOR Gov Account" icon
- The first time you enter the system, you must complete an email authorization
- Enter your email address and click "Login"
- You will receive an email with a link to access MyDORGov. Note: This access remains for 30 days. If you do not access the system for 30 days or access the system from a different computer, you must repeat the email authorization process.
- If requested, enter your contact information. If you are an officeholder, DOR will use this contact information to send notifications for the local government or company you represent.
- Note: You can also access the system from additional landing pages
  - o Town, villages and cities clerk: <u>revenue.wi.gov/Pages/Municipalities/clerk.aspx</u>
  - Town, villages and cities treasurer: <u>revenue.wi.gov/Pages/Municipalities/treasurer.aspx</u>
  - o Counties: revenue.wi.gov/Pages/Counties/home.aspx
  - o School/tech colleges/special districts: <u>revenue.wi.gov/Pages/Schools/Home.aspx</u>
  - TID information: <u>revenue.wi.gov/Pages/SLF/tif.aspx</u>

## B. MyDORGov Home Page

- On the top of your home page, you will see the district or office you have access to
  - o If you have less than 10 offices, use the dropdown to select the appropriate district/office
  - If you have more than 10 offices, enter the appropriate district/office in the search box and select it from the dropdown
- When you select an office, you will see only active forms specific to your role. To view all forms, visit our Online Services page.
- **To e-file** select the form you would like to complete and submit to DOR. Make sure the correct district is listed in the form.
- To review your user profile and access summary click "View User Info" in the top right corner
- To reset your account and login with a different email address, click "Reset MyDORGov" at the bottom of the home page
  - $\circ$   $\;$  This takes you to a logout confirmation page
  - $\circ$   $\;$  Click the MyDORGov Account button to login with another email address  $\;$

## C. How do I update my contact information?

To make contact information updates, click "View User Info" in the top right corner of the MyDORGov home page.

- On the User Information page, click the "Edit User Profile" button
- Make any necessary changes to your contact information and click "Save"
- An email is sent notifying DOR of the change
- Note: You cannot update your email address here. If you have a new email address, contact lgs@wisconsin.gov.

# 2. Officeholder Requests

## A. What is an officeholder?

An officeholder is the person who occupies the official role for a district or company and is responsible for filing forms within MyDORGov. Officeholders include:

- Clerk (municipal or county)
- Treasurer (municipal or county)
- Municipal Clerk/Treasurer
- Special District Representative (lake, metro sewer, sanitary)
- Technical College Representative
- Utility Company Representative

## B. How do I view the offices I hold?

Your current offices are shown on the MyDORGov's User Information page.

- Click "View User Info" in the top right corner
- Under "Your Office Summary" panel, view "Current offices held" to see the list of offices you currently hold
- If an office is not listed, you can add an office by selecting "Request Office" at the top of the page
- If you need to remove an office, click the "x" to the left of the office

# C. How do I add an office?

If you are the officeholder for a local government or company, you can request to add the office to your profile. All requests are reviewed by DOR. To request an office:

- From the MyDORGov home page, click "View User Info" in the top right corner
- If the office is not listed under "Current offices held" or "Pending office requests" in the "Your Office Summary" panel, you can submit a request
- Click "Request Office"
- From the dropdown, select the office (ex: Municipal Clerk) you are requesting
- Enter the district code or name
- Enter the prior officeholder's name and provide an explanation in the Comments box
- Click "Send" to send your request to DOR
- The submitted request will be listed under "Pending office requests" until DOR's review is complete
- DOR will review your request and notify you via email within 10 business days that your request is either approved or denied

## D. How do I remove an office?

If you are no longer the officeholder for a local government or company, you can request to remove the office from your profile. All requests are reviewed by DOR. To remove an office:

- Click "View User Info" in the top right corner
- Under "Your Office Summary" panel, view "Current offices held"
- Click the "x" next to the office you would like to remove
- Select "Yes" to confirm you would like to permanently remove the office
- DOR will review your request and notify you via email within 10 business days that your request is complete

# 3. Access Requests – Filling on Behalf of Others

## A. Who needs to file an access request?

Anyone who would like to file a form for the officeholder must request filing access. If you are not an officeholder (ex: Municipal Clerk), you must submit an access request to e-file on an officeholder's behalf.

#### Example:

- Deputy County Treasurer may need to file on behalf of the County Treasurer
- Office staff may need to file on behalf of the Municipal Treasurer
- County Treasurer or Municipal Assessor may need to file on behalf of a Municipal Clerk

When you submit an access request, the officeholder will review it and approve or deny the request.

## B. How do I view my current access?

The current accesses are shown on the MyDORGov's User Information page.

- From the MyDORGov home page, click "View User Info" in the top right corner
- On the User Information page, in the "Your Access Summary" panel, view "Access to file on behalf of" to see the list offices you are authorized to file on behalf of
- If an office is not listed, you can submit a request by selecting "Request Access" at the top of the page
- If a form is not listed, you must contact the officeholder to modify your form access
- If you would like to remove access, click the 'x to the left of the name

## C. How do I view who has access to file on my behalf?

The current accesses are shown on the MyDORGov's User Information page.

- Click "View User Info" in the top right corner
- In the "Your Access Summary" panel, view "Others authorized to file on your behalf" to see the users that are currently authorized to file on your behalf
- If a user is incorrectly listed or no longer needs access to file on your behalf, click the "x" to the left of the user to remove their access. Note: the user will be notified.

## D. How do I approve/deny access to file on my behalf?

After a user requests access to file on your behalf, you (the officeholder) will receive an email with information on how to approve/deny the request.

## 1) Pending requests

Go to My DOR Government Account and click "View User Info" in the top right corner. Once on the User Information page, in the "Your Access Summary" panel, look under "Pending requests to file on behalf of" for requests needing action. Click the pencil icon requests to go to the "Access Request Review" page.

## • Approve the request

- Select the appropriate forms you are granting access to file, and click "Approve"
- If you would like to share access to all the forms, select "All (current and future forms)." The requestor will have access to forms when they become active.

## • Deny the request

- o Click "Deny"
- $\circ$   $\;$  You do not need to select any forms
- Email sent after you approve or deny the request, the requestor receives an email informing them of your decision

## 2) Modify/View forms a user can access

Go to <u>My DOR Government Account</u> and click "View User Info" in the top right corner. Once on the <u>User</u> <u>Information page</u>, in the "Your Access Summary" panel, look under "Others authorized to file on your behalf".

- Click information icon 6 to view forms this user can access
- Click the pencil icon rate to go to the "Access Request Review" page
- Select the form(s) you want to add/delete and click "Update"

# E. How do I request access to file on someone's behalf?

If you need to file on behalf of an officeholder for a local government or company, you can request access. All requests are reviewed by the officeholder. To request access:

- From the MyDORGov home page, click "View User Info" in the top right corner
- If the office is not listed under "Access to file on behalf of" or "Pending requests to file on behalf of" in the "Your Access Summary" panel, you can submit a request
- Click "Request Access"
- From the dropdown, select the office (ex: Municipal Clerk) you are requesting
- Enter the district code or name
- Enter an explanation in the Comments box
- Click "Send" to send your request to the officeholder
- The submitted request will be listed under "Pending requests to file on behalf of" until the officeholder's review is complete
- You will receive an email when the officeholder's review is complete and your request is either approved or denied

## F. How do I remove access to file on my behalf?

If a user is incorrectly listed or no longer needs access to file on your behalf, you can remove their access. To remove access to file on your behalf:

- Click "View User Info" in the top right corner
- Under "Your Access Summary" panel, view "Others authorized to file on your behalf"
- Click the "x" next to the user you would like to remove
- Select "Yes" to confirm you would like to permanently remove the user's access to file on your behalf
- Note: the user will be notified

# 4. Troubleshooting – What do I do?

## A. Accessing the System

## 1) I submitted my email address to access the system and did not receive the authorization email

The email should arrive within a few minutes. If it does not appear in your inbox, check your Junk/Spam folders. You might have to add a spam exception for @wisconsin.gov.

To add a spam exception in Outlook 2013:

- On the Home tab, click "Junk"
- Select "Junk E-mail Options"
- On the Safe Senders tab, click "Add"
- Type "@wisconsin.gov" into the text box and click "OK"
- If you still don't see the authorization email, go back to the web page and re-enter your email address to receive a new message in your inbox

# 2) I logged into the system with an incorrect email address or I need to log in with my alternate email address and I am unable to access my account

You must log out of My DOR Government Account to reauthorize your email address

- Click link on My DOR Government Account page to reset your account
- Log into the system using the correct email address
- This reset does not affect your existing user information
- See How do I access My DOR Government Account? to complete request to access the system
- If your email address is incorrect within the system, contact DOR at lgs@wisconsin.gov to update the system with the correct email address(s)

## 3) The forms page is empty or will not finish loading

Close all your open browser windows and try again. If that does not help, clear your cookies and cache, then reauthorize your browser.

#### a) Chrome:

- Click the three vertical dots in the upper right corner of your browser
- Hover over "More tools" and select "Clear browsing data"
- Check the boxes next to "Cookies and other site data" and "Cached images and files"
- Select "Clear Data"
- Close all your open browser windows
- Access MyDORGov from the DOR website
- Enter your email address to receive a new login link
- Click the new link in your email to use your default browser, or copy and paste the link into the browser of your choice
- Whichever browser you chose for email authorization, use the same browser every time you access MyDORGov

#### b) Internet Explorer:

- Click the "Tools" (gear wheel) icon in the upper right corner of your browser
- Select "Internet options"
- On the General tab page, under Browsing history, click "Delete"
- Check the boxes next to "Temporary Internet files and website files" and "Cookies and website data"
- Select "Delete"
- Close all your open browser windows
- Access MyDORGov from the DOR website
- Enter your email address to receive a new login link
- Click the new link in your email to use your default browser, or copy and paste the link into the browser of your choice
- Whichever browser you chose for email authorization, use the same browser every time you access MyDORGov

## B. E-filing

#### 1) When e-filing, I click "Start Filing" and nothing happens

When you enter the appropriate district code or name, a dropdown menu appears. Select the appropriate code and name from this list before clicking "Start Filing."

## 2) When e-filing, I cannot view all of the form columns on my page

First, try closing the left panel by clicking the Panel button above the Exit button. Click the Panel button again to reopen the panel.

◉←
Exit
Save
Submit
Print

If that does not help, zoom out or change your display to a higher screen resolution.

#### To zoom out:

- Hold "Ctrl" and scroll down, or
- Hold "Ctrl" and press "-"

#### To zoom in:

- Hold "Ctrl" and scroll up, or
- Hold "Ctrl" and press "+"

If you still cannot view all the columns after zooming out, try increasing your screen resolution. Visit your operating system's website for more information.

- Windows 7
- Windows 10

#### 3) When e-filing, I get an error while trying to upload an attachment

- Verify file being attached is the correct type (Example: PDF file)
- Remove any special characters from the filename and try again.
  Examples: ! () / % \$ " : \_ , . :

#### 4) When e-filing, I click "Print" and it's not working

The Print button loads a .pdf that you can print. If you click "Print" and nothing happens, there may be a pop-up blocker on your system preventing the .pdf from opening. In Google Chrome, the pop-up blocker is on by default.

To disable the pop-up blocker in Chrome:

- Click "Print" to activate the pop-up blocker
- Look for an icon in the address bar in the top right of the browser, to the left of the bookmark star



- Click the icon and choose "Always Allow" then "Done"
- You should be able to load the .pdf now by clicking "Print"
- Depending on your settings, you may be asked if you want to open or save the .pdf file

To disable the pop-up blocker in Internet Explorer:

- Select "Tools" (gear wheel) icon, and then select "Internet options"
- On the Privacy tab, under Pop-up Blocker, uncheck the "Turn on Pop-up Blocker" box, and select "OK"
- You should be able to load the .pdf now by clicking "Print"
- Depending on your settings, you may be asked if you want to open or save the .pdf file

#### 5) When e-filing, I cannot submit. I have errors, but cannot find them.

#### Watch for these symbols

- Help is available for the field
- O There is an error for the field
- \* This is a required field
- A There is a warning for the field
- You can view a list of the errors and warnings in the last section "Preparer/Signature Statement"
- You must correct all errors. You can click the error symbol for a description of the error.
- After all errors are corrected, you can submit the e-file form

#### 6) I submitted the form and forgot to print

You must select "Print" on the left side panel before leaving the confirmation page. If you exit the e-file form without printing a copy of your submitted form, you must contact DOR at otas@wisconsin.gov for a copy.