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# **My DOR Government Account Webinar**

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County Officials

WI Dept of Revenue | March 10, 2020

# Welcome

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Kyle Christianson  
Director of Government Affairs



# Welcome

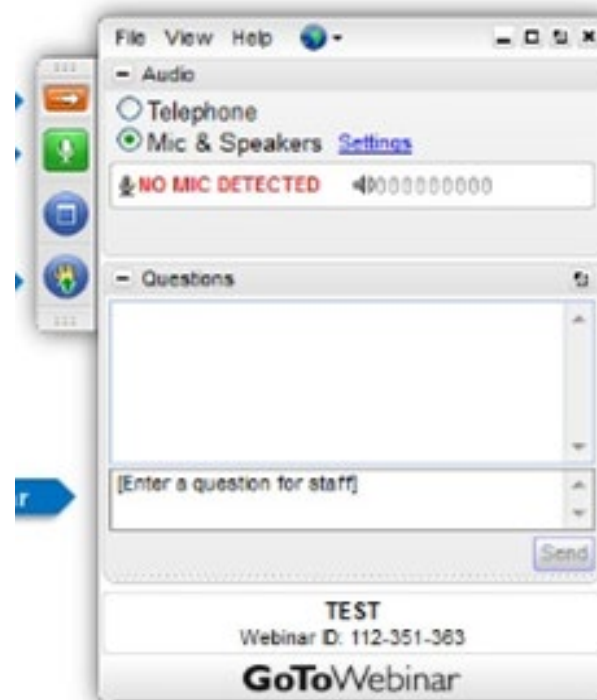
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John Dickert  
SLF Administrator



# Webinar Information

- To ask a question, use the panel
- Enter a question
- Your response will be in the display section
- All Q&A and the recorded webinar will be posted on our website within a week





# Presenters

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- Valeah Foy – SLF Deputy Administrator
- Sharon Hoepfner – Property Assessment Specialist
- Lynn Oldenburg – Auditor
- Deb Werner-Kelln – Auditor



# Topics of Discussion

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- MyDORGov
  - Accessing the system
  - User information
  - Managing your access
  - Managing others access to file on your behalf
  - Resetting your access
  - Submitting a form
- Resources



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# **My DOR Government Account**

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# MyDORGov

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- Launched March 22, 2019
- Enhanced online filing system for local governments
- Formerly *"State and Local Finance Online Filing"*
- Electronically file required forms with DOR
- Maintain your contact information
- Manage who files on your behalf





# Benefits

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- Forms are specific to your role
- Access to filings are assigned/approved
- Ensure appropriate parties are filing your forms
- Easily manage multiple forms and districts/companies
- Directly update your contact information with DOR



# Accessing MyDORGov

MyDORGov icon is on top of these landing pages:

- Governments
- Town, villages and cities
- Counties
- School/tech colleges/  
special districts
- TID information



[Login](#) | [Help](#)

My DOR Government Account (MyDORGov)

MyDORGov contains the majority of DOR's online local government forms.

MyDORGov benefits, include:

- Access to filings are assigned/approved
- Forms are specific to your role
- Ensures appropriate parties are filing your forms
- Easier to manage multiple forms and districts/companies

## Online Services



[Login](#) | [Help](#)

An online filing system for users to file local government related forms with DOR.

# Accessing MyDORGov

## Accessing My DOR Government Account – email authorization:

For added verification, the Wisconsin Department of Revenue (DOR) utilizes email authorization to begin a filing session. You must enter an email address to receive a link before you can file.

### Accessing My DOR Government Account

- Once you click the Login link in your email, you are directed to My DOR Government Account where your forms are located
- You can access My DOR Government Account from the same computer and browser anytime within 30 days. Once you access My DOR Government Account, it resets your 30-day window.
- If you do not access My DOR Government Account within 30 days or if you delete your browsing history (cookies), you must reenter your email address to generate a new link

### Note

- Use the same computer and browser to access My DOR Government Account. If you would like to use a different computer, you must reenter your email address to receive a new Login link.
- Because your email is registered in our system, you do not need a password to access My DOR Government Account

Questions? contact us at [otas@wisconsin.gov](mailto:otas@wisconsin.gov)

## Revenue System Login (this page will expire in 00:14:46)

Enter your email address and click "Login."

Email:

Login


# Home Page

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- The offices you have access to are displayed
- Select an office from the dropdown to see the e-file forms that are available to file
- Forms outside of their filing periods are not displayed
- Officeholders – see all active forms
- Users with 'granted' access – see their approved forms




# Home Page – *no permissions granted*



Wisconsin  
Dept of Revenue

My DOR Government Account

View User Info 

## Getting Started

Welcome to My DOR Government Account, which allows local government officials and others to electronically file (e-file) forms with the Wisconsin Department of Revenue (DOR). According to our records, you do not have an assigned office/access.

### Next Steps

**If you hold or represent one of these offices, click "View User Info" above to update your profile and request an office/access.**

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


### Municipal Assessor

If you are a Municipal Assessor or assessment staff, submit your request through an [Equalization Bureau District](#) Office.

### Questions

- Online filing - [review our online filing help](#)
- General information - contact [otas@wisconsin.gov](mailto:otas@wisconsin.gov) or (608) 266-2149

# Home Page – *permissions granted*

(S) My DOR Government AccountView User Info

**Office Information**

Offices:

Welcome to My DOR Government Account, which allows local government officials and others to electronically (e-file) with the Wisconsin Department of Revenue (DOR). Select a form and submit to DOR by the due date.

**Municipal Clerk**

Form	Name	Due Dates
PA-107	<a href="#">Board of Review Member Training Affidavit</a>	Before Board of Review's first meeting
PA-521	<a href="#">Statement of Assessment</a>	June 11, 2018
PA-632A	<a href="#">Statement of Taxes</a>	December 17, 2018
PC-201	<a href="#">Request for Charge Back of Rescinded or Refunded Taxes</a>	October 1, 2019
PC-202	<a href="#">Tax Increment Worksheet</a>	December 17, 2018
PC-205	<a href="#">Request for Sharing of Non-Manufacturing Omitted Property Taxes</a>	October 1, 2019

# User Information

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- Edit User Profile – to update your contact information
- Your Office Summary – shows the offices you hold
- Your Access Summary – shows the users that can file on your behalf and the officeholders you can file on behalf of
- Important to ensure your information and accesses are correct



# User Information

(S) User Information

Edit User Profile

Request Office

Request Access

Manage Software Tokens

User Profile ?

Email:

Name:

Phone:

Fax:

Address:

Your Office Summary (granted by DOR) ?

Your Access Summary (granted by officeholder) ?

**Current offices held**

* Clerk/Treasurer	59018	TOWN OF RHINE
* SpecialDistrict	597020	RHINE SANITARY DISTRICT #3

**Access to file on behalf of**

* Debra Sample	SpecialDistrict	597030	RHINE & PLYMOUTH SANITARY DISTRICT #1
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**Pending requests to file on behalf of**

* Andrea Sample	Clerk	01002	TOWN OF ADAMS
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**Others authorized to file on your behalf**

* Lynn Sample	Clerk/Treasurer	59018	TOWN OF RHINE
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# Office Requests

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- Only the actual officeholder can request to hold an office
  - Clerk (municipal or county)
  - Treasurer (municipal or county)
  - Municipal Clerk/Treasurer
  - Special District Representative
  - Technical College Representative
  - Utility Company Representative
- If an office is not listed, click "Request Office"
- DOR will review your request and approve/deny within 10 business days

# Access Requests

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- If you need access to file on an officeholder's behalf, click "Request Access"
- The officeholder will review and approve/deny your request
- If you are an officeholder, you can:
  - Review user's requests to file on your behalf
  - Select all forms vs individual forms
  - Remove their access





# Reviewing Access



- Click Info icon – to view the forms a user can file on your behalf

The screenshot shows a web interface titled "Your Access Summary (granted by officeholder) ?". It is divided into two main sections: "Access to file on behalf of" and "Others authorized to file on your behalf".

**Access to file on behalf of:**

- ✘ Andrea Sample  Clerk
- ✘ Debra Sample  SpecialDistrict

**Others authorized to file on your behalf:**

- ✘ Lynn Sample   Clerk/Treasu

An information popup window is overlaid on the right side of the screen, titled "Forms you can access:". It contains a list of forms:

- PA-521 - Statement of Assessment
- PA-550 - Personal Property Value Report
- PA-632A - Statement of Taxes
- PC-201 - Request for Charge Back of Rescinded or Refunded Taxes
- PC-202 - Tax Increment Worksheet
- PC-205 - Request for Sharing of Non-Manufacturing Omitted Property Taxes
- PC-226 - Taxation District Exemption Summary Report

Other visible text in the background includes "DISTRICT #1".

# Updating Access

- Click pencil icon – to add/delete the forms another user can file on your behalf

The screenshot displays the 'Your Access Summary (granted by officeholder)' interface. It is divided into two main sections: 'Access to file on behalf of' and 'Others authorized to file on your behalf'. The first section lists two users: Andrea Sample (Clerk) and Debra Sample (Special District). The second section lists Lynn Sample (Clerk/Treasurer), with a yellow pencil icon next to the role, indicating that the list of forms is being edited. A dropdown menu is open, showing a list of forms with checkboxes. The first checkbox is unchecked, while all others are checked.

Your Access Summary (granted by officeholder) ?	
<b>Access to file on behalf of</b>	
✘ Andrea Sample	📘 Clerk
✘ Debra Sample	📘 Special District
<b>Others authorized to file on your behalf</b>	
✘ Lynn Sample	📘 ✏ Clerk/Treasurer

- All (current and future forms)
- (AT-827) Wisconsin Liquor Licenses
- (BOR-C) Book and Board of Review Calendar
- (MFR-C) Municipal Financial Report for Wisconsin Cities, Villages (and Towns with Proprietary Funds)
- (MFR-CT) Municipal Financial Report for Wisconsin Towns
- (PA-107) Board of Review Member Training Affidavit
- (PA-521) Statement of Assessment
- (PA-550) Personal Property Value Report
- (PA-632A) Statement of Taxes
- (PC-201) Request for Charge Back of Rescinded or Refunded Taxes
- (PC-202) Tax Increment Worksheet

# Resetting Your Account

- You can reset (logout) if using multiple emails
  - This is uncommon

## Questions

- General Filing
  - Review our [online filing help](#)
  - Contact [otas@wisconsin.gov](mailto:otas@wisconsin.gov) or (608) 266-7750
- [Reset MyDORGov](#)



## My DOR Government Account Reset

Your login to My DOR Government Account has been reset. To authorize the correct email address, click the MyDORGov icon, enter the email address and click "Login."

Note: This reset does not affect your existing user information.

# Submitting a Form

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- Home page – select the correct district
- Click the form
- Form home page – filing instructions and contacts for help
- Select 'Start Filing'



# Submitting a Form

Left panel

Wisconsin  
Dept of Revenue

☰

Save

Submit

Print

Exit

Help

**Watch for these symbols**

- 🔍 Help available
- ⊘ Error in field
- ★ Required field
- ⚠ Warning in field

Right panel

Accounting methods:

- Cash basis — revenues are recorded when cash is received; expenses are recorded when cash is paid
- Modified accrual — revenues are recorded when they become available and measurable; expenditures are recorded when the liability is incurred

# Submitting a Form

## Section list

Accounting Basis ☰
<a href="#">Accounting Basis</a>
<a href="#">Section A – Indebtedness</a>
<a href="#">Section B – Tax Roll Reconciliation</a>
<a href="#">Section C – Revenues – Taxes</a>
<a href="#">Section D – Revenues – Intergovernmental Revenues</a>
<a href="#">Section E – Revenues – Intergovernmental Revenues (Cont.)</a>
<a href="#">Section F – Revenues – Licenses and Fines</a>
<a href="#">Section G – Revenues – Public Charges for Services</a>
<a href="#">Section H – Revenues – Intergovernmental Charges for Services</a>
<a href="#">Section I – Revenues – Miscellaneous Revenues and Other Financing Sources</a>
<a href="#">Section J – Expenditures – General Government and Public Safety</a>
<a href="#">Section K – Expenditures – Public Works</a>
<a href="#">Section L – Expenditures – Health, Culture and Conservation</a>
<a href="#">Section M – Expenditures – Capital Outlay</a>
<a href="#">Section N – Expenditures – Debt Service and Other Financing Uses</a>
<a href="#">Section O – Cash and Modified Accrual Basis</a>
<a href="#">Section W – Clerk and CPA Information</a>
<a href="#">Preparer/Signature Statement</a>





# Submitting a Form

Preparer/  
signature page

Preparer/Signature Statement

**Preparer Information**

Name	Title
<input type="text" value="Megan Lukens"/>	<input type="text" value="Title"/>
Email	Phone
<input type="text" value="megan.lukens@wisconsin.gov"/>	<input type="text" value="608-266-8139"/>

**Comments**

Comments

Attach any applicable documents (optional)

**Signature Statement**

Under penalties of law, I declare this form is true, correct and complete to the best of my knowledge and belief.

Do you agree with the statement above?  Yes  
 No

**Note:** Verify your entries and totals before submitting this form. Your accuracy is very important. The values you report directly affect the Equalized Value DOR calculates for schools, special districts and technical colleges.

**Errors and Warnings**

Click the arrow next to the:

- Error(s) to view the field(s) that need correction
- Warning(s) to view the field(s) that need review and an explanation in the Comments section





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# Resources

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# MyDORGov Help

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- Using MyDORGov: [revenue.wi.gov/Pages/FAQS/slf-vault.aspx](https://revenue.wi.gov/Pages/FAQS/slf-vault.aspx)
  - Common questions
  - Videos
- System issues – contact [otas@wisconsin.gov](mailto:otas@wisconsin.gov)





# Email Updates

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- Stay Informed!
- Receive email updates about law changes, filing reminders, updated reports and notifications
- To subscribe:
  - Available lists – [revenue.wi.gov/Pages/HTML/lists.aspx](https://revenue.wi.gov/Pages/HTML/lists.aspx)
    - Sales and use tax, withholding tax, municipal clerks and treasurers, etc.
  - County officials – email: [otas@wisconsin.gov](mailto:otas@wisconsin.gov)



# Additional Resources

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- DOR website – [revenue.wi.gov](https://revenue.wi.gov)
- Online videos – see DOR Video Center
  - Select "Government"
  - Examples: My Tax Account, eRETR, assessment topics (frac sand, use-value)
- Annual calendar – [revenue.wi.gov/slf/cotvc/tvccal.pdf](https://revenue.wi.gov/slf/cotvc/tvccal.pdf)



# Additional Resources

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- Wisconsin Property Assessment Manual – [revenue.wi.gov/Pages/HTML/govpub.aspx#property](https://revenue.wi.gov/Pages/HTML/govpub.aspx#property)
- Publications – [revenue.wi.gov/Pages/HTML/pubs.aspx](https://revenue.wi.gov/Pages/HTML/pubs.aspx)
- Reports – [revenue.wi.gov/Pages/Report/Home.aspx](https://revenue.wi.gov/Pages/Report/Home.aspx)
- Common questions – [revenue.wi.gov/Pages/FAQS/home-pt.aspx](https://revenue.wi.gov/Pages/FAQS/home-pt.aspx)



# Follow-up Information

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- DOR training page – <https://www.revenue.wi.gov/Pages/Training/Home.aspx>
- System troubleshooting – [otas@wisconsin.gov](mailto:otas@wisconsin.gov)
- Specific form information – [lgs@wisconsin.gov](mailto:lgs@wisconsin.gov)
- Please take our brief survey after the webinar – opens new tab