



# My Case Manager User Guide

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## 1. INTRODUCTION

This publication provides information about My Case Manager (MCM), an application within My Tax Account (MTA), which is the department's free online tax system. MCM is designed to help you manage and understand the progress of your audit or case. Use this application to:

- Follow the audit or case stage
- Exchange messages with your auditor
- Track requests for records or information
- View helpful resources, such as:
  - Audit or case history
  - Auditor contact information

## 2. NAVIGATING TO MY CASE MANAGER

### A. Registered Access

If you have an [MTA](#) profile, you can access MCM by logging into your account. Contact your auditor with login issues.

**Note: For disregarded entities, skip to section D.**

- i. Under the **Summary** tab, select **View My Case Manager**.
- ii. Select the audit or case ID number.

For more information on accessing accounts, see [Allow a Third-Party Preparer to Access my Business Tax Accounts Online](#).

### B. Unregistered Access

If you do not have a registered MTA profile, you can use a simplified version of MCM. Unregistered access does not include the messaging feature or allow third-party access.

- i. Visit [MTA](#).
- ii. Under **Additional Services**, select **My Case Manager**.
- iii. Enter information in all required fields and search.

### C. Third-Party Access

You can allow third-party access into your MTA to anyone with an MTA profile. You have the flexibility to choose the accounts and level of access for the third party.

For instructions on granting third-party preparer access, see [Using MTA - Allowing Third-Party Access](#).

### D. Disregarded Entities

A disregarded entity is an entity that is wholly owned by another person or entity. For more information, see [disregarded entities common questions](#) on the department's website.

MCM is housed in the tax account of the disregarded entity's owner. Disregarded entities can access MCM for their audit through:

- Third-party access from the entity's owner
- Unregistered access

### 3. USING MY CASE MANAGER

#### A. My Case Manager Tab

View a summary of audit or case information, including the start date, statute deadline, stage, stage begin date, stage due date, and estimated completion date.

You will see a link showing the number of outstanding and overdue requests, if applicable. Select the link or the **Requests** tab to navigate to the list of requests.

Select **Message Auditor** to send a message to your auditor through MCM. Contact information for your auditor and the auditor's supervisor appears at the bottom of the page.

#### B. Messages Tab

MCM includes a messaging platform for you to safely exchange confidential information.

- Send attachments up to 30MB
- Doesn't require you to download additional software

#### C. Requests Tab

See a list of all requests entered by the auditor including due date, extended due date (if applicable), description, and status. Contact your auditor with questions about these requests.

**Note:** The status of a request may be different from the audit stage found in the **My Case Manager** tab. For example, the request status may show **Waiting on Taxpayer** while the audit stage is **Waiting on DOR**. Be sure to review and address any outstanding requests by their due date.

#### D. Resources Tab

Find links to information that may be helpful to you during the audit, such as administrative rules, statutes, fact sheets, and publications.

#### E. History Tab

View a summary of stage history for your audit or case. If you file an appeal, you will also see an **Appeal History** section at the bottom of this area. Remember, audit stage may be different from request status. See the **Requests** tab for the status of your requests.

### 4. QUESTIONS

Visit our [My Case Manager common questions](#) page or contact your auditor.