



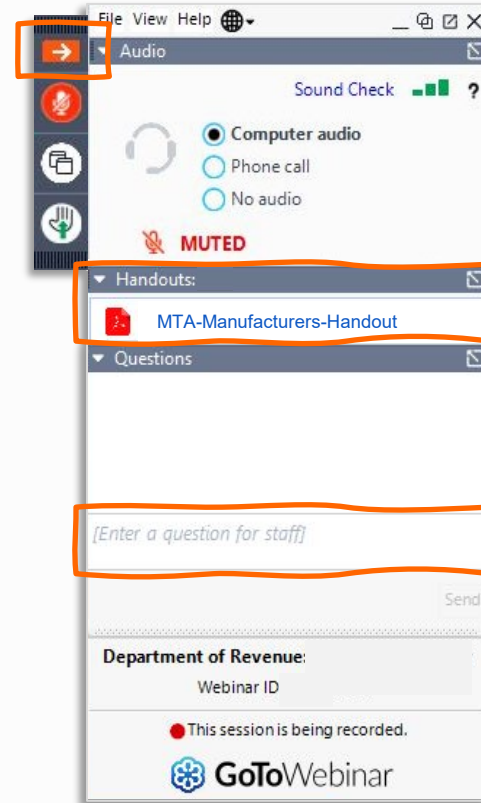
# My Tax Account Webinar

## Annual Refresher for Manufacturers

WI Dept of Revenue | State and Local Finance Division  
January 9, 2024 | 10-11 a.m. (cst)

# Webinar Information

- ▷ Download today's presentation from the Handouts section
- ▷ To ask a question – type in the 'Enter a question for staff' area
- ▷ We'll respond to your question during the webinar
- ▷ All Q&A and the recorded webinar will be posted on our website within a week



# Presenters

- ▷ Leland Froelke – Property Assessment Supervisor
- ▷ Valerie Thompson – IS Business Automation Analyst
- ▷ Dilin Fennell – Property Assessment Specialist Lead
- ▷ Ava Windsor – Property Assessment Technician
- ▷ Debbie Crowell – Property Assessment Specialist Lead

# Discussion Topics



- ▷ My Tax Account registration and login
- ▷ General navigation and profile information
- ▷ Requests and notices
- ▷ E-filing an M-R Form
- ▷ Additional MTA functionality
- ▷ Q&A

# Reminders



- ▷ We're working in a training environment
- ▷ My Tax Account (MTA) is a live environment
- ▷ Don't submit any returns or requests you complete during this webinar
- ▷ Screens may appear differently in the MTA live environment
- ▷ Contact Customer Service – (608) 261-5338
  - If you accidentally submit a return

# Registration and Login

My Tax Account



# MTA Home Page

- ▶ Access training videos
  - Resources panel
  - Select "business videos"
- ▶ General to specific

**My Tax Account Training for Business Users**  
9 videos • 135,687 views • Last updated on Apr 7, 2022

- 1 **Business MTA - Part 1, Overview**  
WIDeptRevenue • 10K views • 2 years ago
- 2 **Business MTA - Part 2, Registration**  
WIDeptRevenue • 5.2K views • 2 years ago
- 3 **Business MTA - Part 3, Sales and Use Tax**  
WIDeptRevenue • 28K views • 2 years ago
- 4 **Business MTA Part 4, File and Pay Withholding Tax**  
WIDeptRevenue • 6.9K views • 2 years ago
- Business MTA Part 5, Other Tax Types**

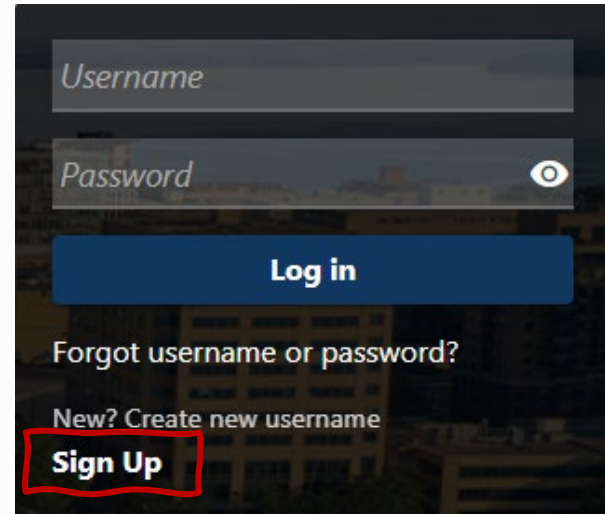
Revenue | MY tax ACCOUNT

Username  
Password  
Log in  
Forgot username or password?  
New? Create new username  
Sign Up

- Businesses**
  - > Register a Business
  - > Search Account Number/Filing Frequency
  - > Buyer's Claim for Refund
  - > Pay Pass-Through Withholding, Corporation, & Partnership Tax
  - > Annual Registration for Qualified WI Business
  - > More...
- Individuals**
  - > Pay Online
  - > Where's My Refund?
  - > Appeal Bill or Notice
  - > ID Verification
  - > Schedule H (Homestead Credit)
  - > More...
- Unclaimed Property**
  - > Search for Property and File Claim
  - > Claimants
  - > Holders
- Excise**
  - > Cigarette, Tobacco, Vapor Products Permit
  - > Alcohol Beverage Permit
  - > Motor Fuel Refunds
- Additional Services**
  - > My Case Manager
  - > Request Tax Record Copy
  - > Upcoming Training Webinar - Register
  - > Sales Tax Certificate of Exempt Status Search
  - > Referred Debt Lookup
- Resources**
  - > 2022 Business Tax Update
  - > **Business Videos**
  - > Individual Videos
  - > My Tax Account Common Questions
  - > More Common Questions

# Register as a New User

- ▷ Click "Sign Up"
- ▷ Below "New? Create new username"
- ▷ Follow registration steps





# Register as a New User

## First Step

- ▷ Enter profile information
  - Review username and password requirements
  - If you don't meet the requirement – you'll receive an error message
  
- ▷ Take note of – and store in a safe place
  - Email
  - Username
  - Password
  - Secret question and answer

## Enter Profile Information

Username \* *Required*

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

Password \* *Required*

Passwords cannot be reused

Confirm Password \* *Required*

Minimum 8 characters

Passwords must contain both letters and numbers

Passwords must contain both uppercase and lowercase letters

Passwords must contain at least one special character

Secret Question \* *Required*Secret Answer \* *Required*Confirm Secret Answer \* *Required*Profile Email Address \* *Required*

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.

Confirm Email Address \* *Required*First and Last Name \* *Required*

Phone Country USA

Phone Type \* *Required*Phone Number \* *Required*

Are You a Third Party Preparer?

No

Yes

Find Saved Request

Cancel

Save Draft

&lt; Previous

Next &gt;

# Register as a New User

## Second Step

- ▷ Enter customer information
  - Identification number (i.e., federal employer identification number or Wisconsin tax number (WTN))
  - Legal name
  - Zip code associated with mailing address DOR has on file for your business
- ▷ Sole proprietor – use
  - Social security number
  - Personal name
- ▷ WTN – located in top-right of greeting letter

## New Registration



Logon Information



Customer Information

### Customer Information

My Tax Account has three levels of access: Master, Administrator, and Account Manager. The first user to complete an access request will automatically receive Master access. All subsequent users who request access will initially receive Account Manager access. The Master is able to manage access for all Account Managers. Additionally, the Master is able to promote Account Managers to Administrator access, which will allow the logon to manage Account Managers as well.

ID Type \*

*Required*

ID \*

*Required*

Customer Last or Business Name \*

*Required*

Customer Zip Code \*

*Required*

**Find Saved Request**

Cancel

Save Draft

< Previous

Next >

# Register as a New User

## Third Step

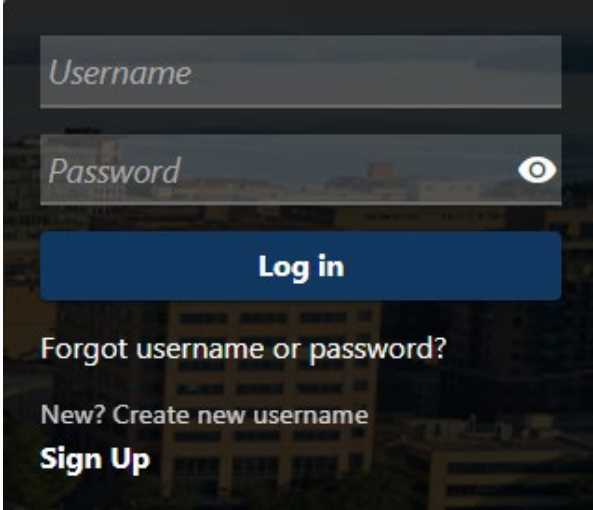
- ▷ Answer the question "Are you an active business customer?"
- ▷ Click "Next"

## Fourth (and final) Step – Account Access

- ▷ Select account in the Tax Account Type drop-down
- ▷ Enter required information
  - Last nine digits of PARID number
  - Total Y-R balance from prior return – tax year 2023
  - Letter ID – from the top right corner of the greeting letter you received in the mail

# MTA Login

- ▶ Login issues – reset password or have your username emailed to you
- ▶ Click "Forgot Username or Password" link
- ▶ Enter username and password to login

A screenshot of the MTA login interface. It features a dark background with a cityscape. At the top, there are two input fields: the first is labeled "Username" and the second is labeled "Password" with a white eye icon to its right. Below these fields is a prominent blue button with the text "Log in" in white. Underneath the button, there are three lines of text: "Forgot username or password?", "New? Create new username", and "Sign Up" in a bold font.

# MTA Login – First Time Logging In

- ▶ Don't wait to login – register before March 1, 2024
  - Allows time to resolve any issues before filing a return
- ▶ Add [MTAsupport@wisconsin.gov](mailto:MTAsupport@wisconsin.gov) as a trusted email address
  - Your security settings may prevent or delay receiving the security code by email
- ▶ Set up a delivery method for your security code
  - Text – default
  - Email – click "More Security Code Delivery Options"
  - Authenticator app
- ▶ Check box to "Trust this device"
  - In the future – you won't have to enter a security code on your device

# General Navigation and Profile Information


My Tax Account






# General Navigation


- ▷ Favorites tab
- ▷ Summary tab
- ▷ Action Center tab
- ▷ Settings tab
- ▷ More...tab
  - Manage payments and returns
  - Request a payment plan and view payment breakdown
  - View or cancel scheduled payments
  - View letters and messages
  - Search submissions/Manage names and addresses

 **Payments and Returns**


- > Manage Payments and Returns
- > Request a Payment Plan
- > View Payment Breakdown
- > Pay Real Estate Transfer Fees
- > View or Cancel Scheduled Payments

 **Letters**


- > View Letters

 **Messages**


- > View Messages

 **Submissions**

- > Search Submissions

 **W2/1099 Submissions**

- > Enter W-2/1099 Information

 **Names and Addresses**

- > Manage Names and Addresses

# Manage My Profile

▷ Profile tab

**Welcome, Manufacturer**

*You last logged in on Friday, Dec 15, 2023 10:49:06 AM*

[Manage My Profile](#) **1**

## Security

Password

Last changed November 15

[Change Password](#)

Secret Question

What is the name of your first pet?

[Update Your Secret Question](#)

Two-Step Verification Settings

Codes are sent via text message and email

[Change Two-Step Settings](#)


# Requests and Notices

My Tax Account




# Action Center Tab – More...

- ▷ Manage Access
  - Manage My Access
  - Manage My User's Access
  - Manage Other User's Access
  - Manage Third Party Access
  
- ▷ Request Access
  - To an account
  - To a third-party account

 **Request Additional Access**

- > Request Access to an Account
- > Request Access to a Third Party Account

 **Manage Access**


- > Manage My Access
- > Manage My User's Access
- > Manage Other User's Access
- > Manage Third Party Access
- > Delete My Profile
- > Close Accounts

# Action Center Tab – More...


- ▷ Manage Payment Sources
- ▷ View Messages
- ▷ Search Submissions
- ▷ View Activity

The screenshot displays a grid of four action cards within a white container with a thin border. Each card has a title, an icon, and a sub-action link.


- Payment Sources**: Features a building icon. Below the title is a link: > Manage Payment Sources.
- Messages**: Features a speech bubble icon. Below the title is a link: > View Messages.
- Submissions**: Features a downward arrow icon. Below the title is a link: > Search Submissions.
- Logon Activity**: Features a checkmark icon. Below the title is a link: > View Activity.

 **Request Additional Access**


- > Request Access to an Account
- > Request Access to a Third Party Account

 **Payment Sources**


- > Manage Payment Sources

 **Messages**


- > View Messages

 **Manage Access**

- > Manage My Access
- > Manage My User's Access
- > Manage Other User's Access
- > Manage Third Party Access
- > Delete My Profile
- > Close Accounts

 **Submissions**

- > Search Submissions

 **Logon Activity**

- > View Activity

# Manufacturing Real Estate Accounts

- ▶ Choose your manufacturing account

Manufacturing Real Estate

24 Manufacturing Real Estate accounts > View Accounts

^ Manufacturing Real Estate

123 MAIN ST  
BADGER WI 54321  
Filing Frequency: Annual

237-1234567890-000

Balance  
\$0.00

> File/View Returns  
> Record Sale

- ▶ Click "File/View Returns" to begin



# Manufacturing Real Estate Accounts

- ▷ Other options available:
  - Appeal
  - Request Extension to File
  - View or Cancel Scheduled Payments

<b>Returns</b>	Balance	> Appeal
Manufacturing Real Estate	<b>\$0.00</b>	> Request Extension to File
237-1234567890-000		> View or Cancel Scheduled Payments
MANUFACTURING COMPANY LLC		

# E-filing an M-R Form

My Tax Account



# E-filing an M-R Form



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# E-filing an M-R Form

- ▶ Contact information screen – preparer information is pre-filled
- ▶ Choose "Yes" or "No"
- ▶ If "Yes" – update your information and click "Next"

The screenshot displays the 'Form M-R' e-filing interface. At the top, it shows 'Form M-R' and 'Staging'. Below this is a progress bar with a 'Contact Information' step. The main content area is divided into sections: 'Filling Tips' and 'Form Instructions'. The 'Preparer Information' section is highlighted with a red box and contains fields for Name, Email, and Phone. Below this is the 'Manufacturer/Owner Contact Information' section, also highlighted with a red box. It asks 'Do you need to update contact information?' with 'Yes' and 'No' radio buttons. The 'Yes' button is selected. Below the question are two rows of contact information for 'OTAS TEAM'. The first row shows 'Phone Country' as USA, 'Phone Type' as Business Phone, and 'Phone Number' as (608) 000-0000. The second row shows 'Phone Country' as USA, 'Phone Type' as Fax - Business, and 'Phone Number' as an empty field. At the bottom, there are 'Cancel', 'Save Draft', 'Previous', and 'Next' buttons.

Manufacturer/Owner Contact Information			
Do you need to update contact information?			
<input checked="" type="radio"/> Yes		<input type="radio"/> No	
Name	Email		
OTAS TEAM	otas@wi.gov		
Phone Country	Phone Type	Phone Number	Ext.
USA	Business Phone	(608) 000-0000	
Phone Country	Phone Type	Phone Number	Ext.
USA	Fax - Business		

# E-filing an M-R Form

- ▶ Form instructions – downloads a pdf of the instructions
- ▶ "Save Draft" – use if you will leave the form for more than 15 minutes
- ▶ Will save your work up until that point

The screenshot displays the 'Form M-R' staging interface. At the top, it says 'Form M-R' and 'Staging'. Below this is a progress bar with a dropdown arrow and the text 'Contact Information'. The main content area is divided into three sections: 'Filling Tips', 'Preparer Information', and 'Manufacturer/Owner Contact Information'. In the 'Filling Tips' section, the 'Form Instructions' link is highlighted with a red box. The 'Preparer Information' section has fields for Name, Email, and Phone. The 'Manufacturer/Owner Contact Information' section includes a question 'Do you need to update contact information?' with 'Yes' and 'No' radio buttons. Below this are two rows of contact information, each with fields for Name, Email, Phone Country, Phone Type, Phone Number, and Ext. The first row shows 'OTAS TEAM', 'otas@wi.gov', 'USA', 'Business Phone', and '(608) 000-0000'. The second row shows 'USA', 'Fax - Business', and empty fields for Phone Number and Ext. At the bottom, there are 'Cancel' and 'Save Draft' buttons, with 'Save Draft' highlighted in red. Navigation buttons for 'Previous' and 'Next' are also visible.

# E-filing an M-R Form

## Schedule A

- ▷ List of questions that build your report
- ▷ Depending on your answer to the questions,
  - A schedule related to that question may be added to the report – **or** –
  - Immediate additional information is required

Schedule A		
Property Address 201 N 1ST AVE 54401		
1. Is this property <b>Vacant or Non-operating</b> ? If "No", complete Schedule R-5. If "Yes", enter the date and reason vacancy began.	Date	Reason
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	_____	_____
2a. During the last two years, was this property bought/sold?	Date	Price
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	_____	0
2b. During the last two years, was this property listed/offered for sale?	Date	Price
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	_____	0
4. Was this property appraised since January 1, 2023?	Date	Price
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	_____	0
Purpose of Appraisal _____		
4a. Were there any changes to the parcels size or shape between January 1, 2023 - January 1, 2024?		
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
If "Yes" describe and complete Schedule Y-R, Part 1-"Land Size (acres or SF)", Col.3 or Col.4		
For webinar purposes only.		

# E-filing an M-R Form

4b. Were there any changes to new construction or construction in progress from previous years between January 1, 2023 - January 1, 2024?  
If yes, complete Schedule R-1.

<input checked="" type="radio"/> Yes	<input type="radio"/> No
--------------------------------------	--------------------------

4c. Were there any changes to remodeling of any previously existing building between January 1, 2023 - January 1, 2024?  
If yes, complete Schedule R-2.

<input checked="" type="radio"/> Yes	<input type="radio"/> No
--------------------------------------	--------------------------

4d. Were there any changes to demolition between January 1, 2023 - January 1, 2024? \*

If yes, complete Schedule R-3.

<input type="radio"/> Yes	<input type="radio"/> No
---------------------------	--------------------------

4e. Were there any changes to land improvements (ex. paving, fences, lighting, curbs) between January 1, 2023 - January 1, 2024?  
If yes, complete Schedule R-4.

<input checked="" type="radio"/> Yes	<input type="radio"/> No
--------------------------------------	--------------------------

4f. Were you reporting a building on leased land between January 1, 2023 - January 1, 2024?  
If yes, complete Schedule R-5, Part B

<input checked="" type="radio"/> Yes	<input type="radio"/> No
--------------------------------------	--------------------------

4g. Were there any changes to waste treatment facilities between January 1, 2023 - January 1, 2024?  
If yes, complete Schedule R-6.

<input checked="" type="radio"/> Yes	<input type="radio"/> No
--------------------------------------	--------------------------

# E-filing an M-R Form

## Schedule R-1

- ▷ Appears if 4(b) in Schedule A is "yes"
- ▷ If you have more than one structure under construction, you must complete a separate report for each structure
- ▷ Attach a building plan – required



# E-filing an M-R Form

## Schedule R – Part 1

- ▶ Enter description of construction

Schedule R-1

**Part 1 - New Construction and Construction in Progress**

Is new construction a free standing building or an addition to an existing structure? \*

*Required*

**Provide the following for the new construction:**

Ground floor area Sq. Ft. (footprint)	Upper floor area Sq. Ft.	Building height FT
0	0	0

**Structure type by floor area:** The total floor area for office, production and warehouse must equal 100% \*

Percentage Office	Percentage Production	Percentage Warehouse
0	0	0

Foundation *	Basement *
<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Insulation *	Plumbing *
<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Framing *	Exterior wall *	Power *
<i>Required</i> <input type="text"/>	<i>Required</i> <input type="text"/>	<i>Required</i> <input type="text"/>

Heating: Percentage of building area heated  
0

Air Conditioning: Percentage of building area cooled  
0

Fire Protection: Percentage of building area fire protected  
0

# E-filing an M-R Form

## Schedule R – Part 2

▶ Enter construction costs

Schedule R-1

**Part 2 - New Construction and Construction in Progress Costs**

Contractor \*  Name

*Required*

1. Site preparation

2. Foundation, basement and superstructure

3. Electrical/lighting/power

4. Plumbing

5. Sprinkler system

6. HVAC

7. Finish - partitions; interior finish on floors, walls and ceilings

8. Start-up costs

9. Other costs

[Add Other Costs](#)

# E-filing an M-R Form

## Schedule R-2

- ▷ Appears if 4(c) in Schedule A is "yes"
- ▷ Enter the description, cost and estimated value of such things as
  - Roof repair/replacement
  - Building mechanical updates
  - Office remodel
  - Etc.

# E-filing an M-R Form

**Schedule R-2**  
**Remodeling Including Construction in Progress**

**Report:** Use this schedule to identify changes to **existing** structures for this parcel.

	Description of Changes	Cost	Estimated Effective Increase in Value

**Total Cost** \_\_\_\_\_ 0

Enter what you feel is the total effective value increase to the property as a result of these changes. \_\_\_\_\_ 0

# E-filing an M-R Form

## Schedule R-3

- ▷ Appears if 4(d) in Schedule A is "yes"
- ▷ Demolitions – report building(s) or land improvement(s) removed or in progress

# E-filing an M-R Form

**Schedule R-3**  
**Demolitions Including Demolition in Progress**

**Report:** Building or land improvements that were removed from this parcel

	Description	Sq. Ft. Affected	Year Built	Original Cost	Cost to Raze

**Total Cost** \_\_\_\_\_ 0

**Total Cost to Raze** \_\_\_\_\_ 0

Enter what you feel is the total effective value change as a result of the demolition. \_\_\_\_\_ 0

# E-filing an M-R Form

## Schedule R-4

- ▷ Appears if 4(e) in Schedule A is "yes"
- ▷ Enter the description, cost and estimates of land improvements – such as
  - Paving
  - Landscaping
  - Fencing
  - Lot lighting
  - Etc.

# E-filing an M-R Form

⋮ Staging

### Schedule R-4 Land Improvements Including Construction in Progress

**Report:** Land improvement changes. Provide a description for "Landscaping" and "Other."

#### Paving

Improvement change <sup>*</sup> <i>Required</i>	Type of pavement
<input type="text"/>	<input type="text"/>
Depth (inches)	SQ FT
<input type="text" value="0"/>	<input type="text" value="0"/>
Paving Cost	
<input type="text" value="0"/>	

#### Landscaping

Describe improvement change

Landscaping Cost

#### Sewer/Drainage System

Improvement change <sup>*</sup> <i>Required</i>	Type of sewer/drainage
<input type="text"/>	<input type="text"/>
Sewer/Drainage Cost	
<input type="text" value="0"/>	

#### Water System

Improvement change <sup>*</sup> <i>Required</i>	Depth (feet)
<input type="text"/>	<input type="text" value="0"/>

CancelSave Draft⌵< PreviousNext >



# E-filing an M-R Form

### Railroad Siding

Lineal FT  
0

Railroad Siding Cost  
0

### Other - (ex: fences, lighting, curbs)

Description	Cost

**Total Cost** 0

Enter what you feel is the total effective value increase as a result of these changes. 0

[Cancel](#) [Save Draft](#) [< Previous](#) [Next >](#)

# E-filing an M-R Form

## Schedule R-5

- ▶ Answered "No" to question 1 and/or "Yes" to question 4(f) in Sch. A
- ▶ This schedule is updated to include questions related to business occupancy and activity. To ensure continued classification as a manufacturer, it is important to answer the questions fully.

Schedule R-5

**Real Estate Occupancy**

**Part A: Owner Occupied**

Name of Business  
OTAS TEAM

Enter the amount of owner-occupied space used for manufacturing or in support of manufacturing (square footage or percentage of total building area)

Percentage Office	Percentage Production	Percentage Warehouse
15	70	15

Product(s) manufactured on site  
Test products

1. Is there a tenant owned building on this property, commonly referred to as building on leased land? (if yes fill part B. below)

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
------------------------------	----------------------------------------

2. Was this property leased on January 1? (if yes fill in part C. below)

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
------------------------------	----------------------------------------

**Part B. Tenant Owned Building on Leased Land**

Business name TEST INC	Size(Sq.ft.) 50	Year Built 2013
Business Activity MFG	Original Cost 450,000	Estimated Market Value 500,000

1. Were any changes made to the tenant owned land or building improvements between January 1, 2023 - January 1, 2024?

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
------------------------------	----------------------------------------

If Yes, review Sch.A question 4(a-f) to be sure the questions are answered correctly and the appropriate schedules completed.

2. Are you related the tenant/occupant?

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
------------------------------	----------------------------------------

# E-filing an M-R Form

## Schedule R-5

- ▶ Answered "No" to question 1 and/or "Yes" to question 4(f) in Sch. A

Schedule R-5 ?

Part C. Tenant/Occupant			Current Lease Information		
Business Name TEST INC			Square foot leased 45	Lease \$SF 45,000.00	Lease Type LEASE
Address 2135 RIMROCK RD			Number of months 12	Start Date 01-Jan-2023	End Date 18-Dec-2023
City MADISON	State WISCONSIN	Zip 53713-0000	Rent Includes (Check all that apply)		
Business			If other, explain		
Email					
Phone					
Briefly describe how tenant uses the leasable space					
1. Does this parcel have leasehold improvements (building components or land improvements)?					
<input type="checkbox"/> Yes <input type="checkbox"/> No					
If Yes, review Sch.A question 4(a-f) to be sure the questions are answered correctly and the appropriate schedules completed.					
2. Are you related to the tenant/occupant?					
<input type="checkbox"/> Yes <input type="checkbox"/> No					
If yes, explain relationship below?					

# E-filing an M-R Form

## Schedule R-6

- ▷ Appears if 4(g) in Schedule A is "yes"
- ▷ Report changes to waste treatment facilities

# E-filing an M-R Form

## Schedule R-6 Waste Treatment Facilities

**Report:** Waste Treatment Activities.

1. Did the waste treatment status change in 2023? (ex: property no longer used for waste treatment; crops on vacant land sold; acreage used for waste treatment increased or decreased) \*

Yes	No
-----	----

2. Did the assets used for waste treatment have any physical changes in 2023? (ex: new construction; remodeling or changes to buildings or structures; demolition) \*

Yes	No
-----	----

If you selected "Yes" for either question, describe below.

Cancel

Save Draft

< Previous

Next >

# E-filing an M-R Form

**Schedule Y-R – summary of your costs** – appears when you have moved through all the schedules

- ▷ If you e-filed last year, your previous values will appear on Schedule Y-R
- ▷ Values in this schedule do not automatically appear. They must be entered.
- ▷ Enter any changes in the additions and deletions columns in the year the cost occurred
- ▷ For help completing this table, use the "View Summary of Costs" button at the top of the page
- ▷ Report changes to waste treatment facilities

# E-filing an M-R Form

## Schedule Y-R

### Part 1 - Total Real Estate Original Costs From Your Accounting Records

**Report:** All real estate costs associated with this parcel.

If you filed a Schedule R-1, R-2, R-3, or R-4, you must have entries for additions and deletions. Click on Summary of Costs to view appropriate entries.

[View Summary of Costs](#)

Property Type or Account	Balance Jan. 1, 2023	Additions (+) during 2023	Deletions (-) during 2023	Balance Jan. 1, 2024
1. Land Cost	505,000	0	0	505,000
2. Land improvement cost	0	0	0	0
3. Building(s) cost	35,000	0	0	35,000
4. Building components cost	0	0	0	0
5. Construction in progress cost (RE only)	0	0	0	0
6. Waste treatment cost (RE only)	0	0	0	0
7. Other	0	0	0	0
	540,000	0	0	540,000

	Jan. 1, 2023	Additions during 2023	Deletions during 2023	Jan. 1, 2024
<b>Land size (Acres or SF)</b>	0.000	0.000	0.000	0.000

# E-filing an M-R Form

## Schedule B – summary of changes

- ▷ Review the totals
- ▷ To go back and correct a completed schedule, or add another schedule by choosing "Yes" to a question on Schedule A – use the report progression line at top of the page to move back and complete the action
- ▷ When you are finished – click the "Submit" button



# E-filing an M-R Form

## Form M-R

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✓ ✓ ✓ ➤

Contact Information      Schedule A      Schedule Y-R      Schedule B

---

**Filing Tips**      Form Instructions

---

### Schedule B

#### Summary of All Real Estate Changes

Below is a summary of the changes you declared in this filing.

**Changes - Complete the appropriate schedule for values**

	Cost	Value
1. New construction and construction in progress	0	0
2. Remodeling and construction in progress	0	0
3. Demolitions and demolitions in progress	0	0
4. Land improvements and construction in progress	0	0

---

# Additional Functionality

My Tax Account



# Manufacturing Sale Information

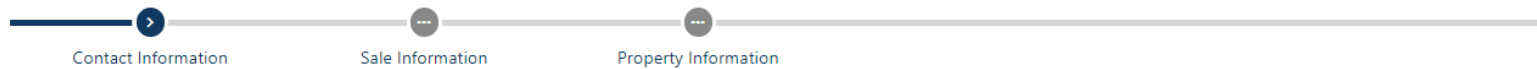
- ▷ Record a sale for manufacturing real estate
- ▷ Locate Wisconsin tax number (WTN) associated with the real estate account that you need to report a sale for
- ▷ Click "Record Sale"

<b>Manufacturing Real Estate</b> 123 MAIN ST BADGER WI 54321 Filing Frequency: Annual	237-1234567890-000 Balance <b>\$0.00</b>	<a href="#">&gt; File/View Returns</a> <a href="#">&gt; Record Sale</a>
------------------------------------------------------------------------------------------------	------------------------------------------------	----------------------------------------------------------------------------

# Manufacturing Sale Information

- ▷ Contact Information
  - Verify seller information
  - Make any necessary updates
- ▷ Buyer Information
  - Add buyer information
  - Validate address to proceed to next step

## Sale Information



### Preparer Information

Name

Email

Phone

### Seller Information

Do you need to update this contact information?

<input type="checkbox"/> Yes	<input type="checkbox"/> No
------------------------------	-----------------------------

Name

Email

Phone Country

USA

Phone Type

Business Phone

Phone Number

Ext.

Phone Country

USA

Phone Type

Fax - Business

Phone Number

Ext.

Cancel

Save Draft

< Previous

Next >

# Manufacturing Sale Information

- ▷ Sale Information
  - Date listed
  - Sale date
  - Sale price
- ▷ Identify how you arrived at sale price
- ▷ Was an appraisal done
- ▷ If appraisal was done, attach a copy
- ▷ Complete closing statement

## Sale Information



Contact Information



Sale Information



Property Information

Date Listed 



Sale Date 

Date listed cannot be a future date



Sale Price \*

*Required*

1. How did you arrive at the sale price?



2. Was an appraisal done?

Yes

No

## Attachments

Add Attachments

Type	Name	Description	Size (in kB)
------	------	-------------	--------------

There are no attachments.

Cancel

Save Draft

< Previous

Next >

# Manufacturing Sale Information

## ▷ Property Information

- Provide county register of deeds document number
- Type of sale
- Indicate if personal property was included
- Choose financing method
- Answer questions about seller financing
- Multiple parcels
- Relationship of buyer to seller
- Real estate agent involvement



## Sale Information

Contact Information

Sale Information

Property Information

### Real Estate

Provide county register of deeds document number: \*

Required

1. Type of sale: !

Asset

Investment

Lease-buyback

1031 exchange

Stock

Other

Describe type of sales:

2. Was any personal property included?

Yes	No
-----	----

If yes, enter value.

0.00

Describe included property:

3. Financing: !

Cash

Bank

Land contract

Other

Describe financing:

4. Was there any seller financing?

Yes	No
-----	----

5. Did the sale include multiple parcels?

Yes	No
-----	----

6. Relationship of the buyer to seller: !

- None  Relative  Business  
 Tenant  Adjacent owner  
 Other

Describe relationship:

7. Was a real estate agent involved with the sale?

Yes	No
-----	----

If yes, provide realtor/broker information:

### Realtor Information

Company Name

Street

Street 2

Unit Type

Unit

City

State

Zip Code

Contact First Name

Contact Last Name

[Validate Address](#)

Email

Phone

Cancel

Save Draft

< Previous

Submit

# Filing a Valuation Appeal

- ▶ Choose the manufacturing real estate account
- ▶ Click "File/View Returns"

The screenshot shows a software interface with a navigation bar at the top containing 'Summary', 'Action Center' (with a red notification icon), 'Settings', and 'More...'. Below the navigation bar is a 'Filter' input field. The main content area displays a card for a 'Manufacturing Real Estate' account. The card includes the address '123 MAIN ST, BADGER WI 54321' and 'Filing Frequency: Annual'. To the right of the address, the account number '237-1234567890-000' is displayed, followed by the label 'Balance' and the amount '\$0.00'. On the far right of the card, there are two buttons: '> File/View Returns' and '> Record Sale'. The 'File/View Returns' button is highlighted with a red rectangular box.

<b>Manufacturing Real Estate</b> 123 MAIN ST BADGER WI 54321 Filing Frequency: Annual	237-1234567890-000 Balance <b>\$0.00</b>	<a href="#">&gt; File/View Returns</a> <a href="#">&gt; Record Sale</a>
------------------------------------------------------------------------------------------------	------------------------------------------------	----------------------------------------------------------------------------

# Filing a Valuation Appeal

- ▶ Start filing your appeal
- ▶ Click "Appeal" in upper right corner

<b>Returns</b>	Balance	> Appeal
Manufacturing Real Estate	<b>\$0.00</b>	> View or Cancel Scheduled Payments
237-1234567890-000		
MANUFACTURING COMPANY LLC		

# Filing a Valuation Appeal

## ▷ Appeal Information

- Enter the Letter ID from your Notice of Manufacturing Real Estate Assessment
- Appeal period must be December 31 (of the assessment year you are appealing) – for this year, Dec. 31, 2024

Appeal Information	
Account Type	(237) Manufacturing Assessment Real Estate
Letter ID	L0355698640
Notice Date	<input type="text"/>
Notice Type	<input type="text"/>
Appeal Period	31-Dec-2023

	<b>WISCONSIN DEPARTMENT OF REVENUE</b> 819 N 6TH ST RM 530 MILWAUKEE, WI 53203-1606	<b>Contact Information:</b> Milwaukee Manufacturing District - 77 819 N 6TH ST RM 530 MILWAUKEE, WI 53203-1606 ph: 414-227-4456 fax: 414-227-4095 email: mfgm77@wisconsin.gov website: revenue.wis.gov
000411	Letter ID	L0355698640
<b>MANUFACTURING COMPANY LLC</b> 123 MAIN STREET BADGER WI 54321		
<b>2023 Notice of Manufacturing Real Estate Assessment</b>		

# Filing a Valuation Appeal

- ▶ Enter your opinion of value
  - Assessment as shown on Notice of Assessment auto-fills
  - You must enter your opinion of value
- ▶ If property is exempt
  - Click "Yes" – opinion of value field auto-fills with "0"
  - You must enter a reason/basis explanation if you select "Yes"

### Objection to Manufacturing Real Estate Assessment

Assessment as shown on notice - Total 1,534,900

The property is exempt or has no value. Explain within the Reason and Basis fields below.  Yes  No

Your opinion of value – Total 100,000

### Notice of Manufacturing Real Estate Assessment

Real Estate Assessment	
Land	\$278,300
Improvements	\$1,256,600
<b>Total 2023 Real Estate</b>	<b>\$1,534,900</b>

# Filing a Valuation Appeal

- ▷ Reason for Objection and Basis of Estimate
  - These fields must be filled in
  - If there is no reason or basis entered, the BOA will dismiss your appeal
  - Sec. 70.995(8)(c)(1), Wis. Stats.
  - "N/A" is not acceptable

## Reasons for Objection and Basis of Estimate

Enter your reason(s) for objection

Must enter a reason for objection or your appeal will be dismissed.

Enter basis for your opinion of value

Must enter basis for your opinion of value or your appeal will be dismissed.

# Filing a Valuation Appeal

## ▷ Submitting Additional Information

- Choose "Yes" if you do not intend to send additional information
- The BOA will process your appeal faster if there is no 60-day wait for additional information

### **Submitting Additional Information**

Under state law (sec. 70.995(8)(c)2., Wis. Stats.), you may submit additional information to the State Board of Assessors (BOA) within 60 days of your appeal.

I hereby waive my right to provide additional information to the BOA under sec. 70.995(8)(c)2., Wis. Stats. \*

Yes

No



# Filing a Valuation Appeal

- ▶ Authorized Agent
  - If an authorized agent is filing, they must fill in the agent information
  - Click "Validate address" to continue

**If you are an authorized agent, complete the information below and attach an Agent Authorization Form (PA-105).**



Name		
Company or Title		
Street		
Street 2		
Unit Type	Unit	Country
		USA
City	State	Zip Code
	WISCONSIN	
<b>Validate Address</b>		

# Filing a Valuation Appeal

- ▷ Enter date of appeal

Date 

- ▷ If applicable, attach Agent Authorization Form (PA-105)

 Agent authorization attachment required 

**Attachments** Add Attachments

Type	Name	Description	Size (in kB)
There are no attachments.			

# Filing a Valuation Appeal

## ▷ Adding Attachments

- If you have documentation to provide (i.e., agent authorization, an appraisal, lease), attach it here
- Click "Add Attachments"
- Select file to attach
  - Choose file type from the dropdown
  - Enter description
  - Choose your file and click "OK"

Select a file to attach

Type  
Agent Authorization - Property Assessment

Description  
Agent Authorization

File  
Choose File left-102f.pdf

Cancel OK

# Filing a Valuation Appeal

- ▷ Payment due at time of filing – complete the following
  - Select checking or savings
  - Enter bank routing number
  - Enter account number
  - Confirm account number
  - Enter \$200.00 to confirm fee amount
- ▷ If no fee is due – payment screen does not appear

Payment Source	Payment
Type Direct Debit	Payment Date 09-May-2023
Bank Account Type * <input type="radio"/> Checking <input type="radio"/> Savings	Amount 200.00
Routing Number * <i>Required</i>	Confirm Amount <i>Required</i>
Populate Routing Number	
Account Number * <i>Required</i>	
Confirm Account Number * <i>Required</i>	
Save this payment source for future use <input type="button" value="No"/> <input type="button" value="Yes"/>	

# Filing a Valuation Appeal

- ▶ Preparer Information
  - Confirm information and click "Submit"

**Account**

Manufacturing Real Estate  
237-1234567890-000  
MANUFACTURING COMPANY LLC

**Appeal Bill or Notice**

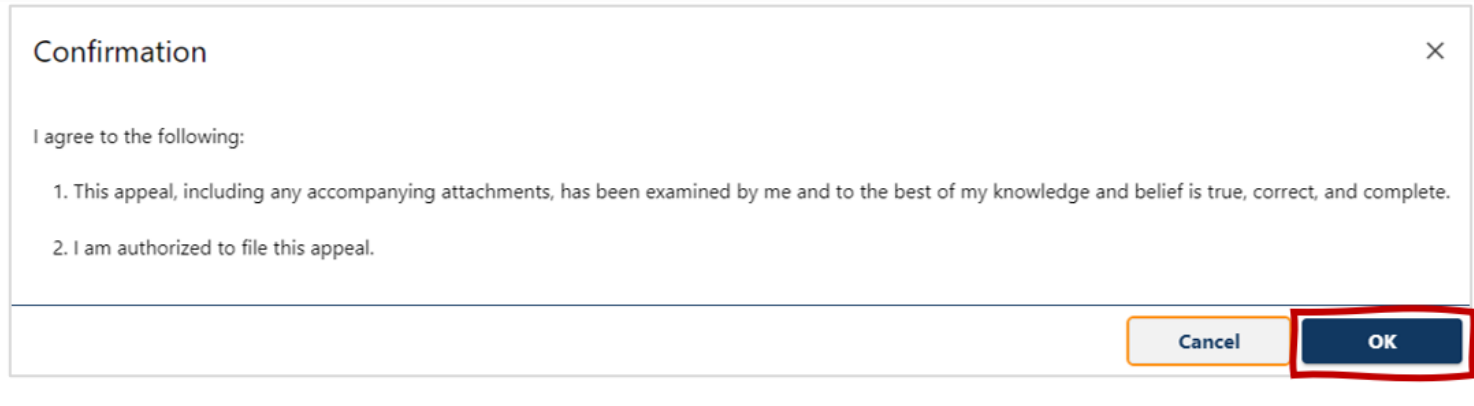
Appeal      Mfg Assessment Appeals      **Preparer**

**Preparer Information**

Name : JOHN MANUFACTURING  
Phone Number : (608) 222-3333  
Email : jmanufact@company.com

# Filing a Valuation Appeal

- ▷ Confirmation agreement screen
  - Click "OK" to continue

A screenshot of a software confirmation dialog box. The dialog has a title bar with the text "Confirmation" and a close button (X) in the top right corner. The main content area contains the text "I agree to the following:" followed by two numbered items: "1. This appeal, including any accompanying attachments, has been examined by me and to the best of my knowledge and belief is true, correct, and complete." and "2. I am authorized to file this appeal." At the bottom right of the dialog, there are two buttons: a light gray "Cancel" button and a dark blue "OK" button. The "OK" button is highlighted with a red rectangular border.

Confirmation ×

I agree to the following:

1. This appeal, including any accompanying attachments, has been examined by me and to the best of my knowledge and belief is true, correct, and complete.
2. I am authorized to file this appeal.

Cancel OK

# Filing a Valuation Appeal

- ▶ Confirmation screen
  - Print a copy for your records

### Confirmation

Your appeal is submitted.

Your confirmation number is **1-454-073-440**.

Appeal for	MANUFACTURING COMPANY LLC
ID number	1234567890
Date submitted	15-Jul-2023 at 11:23:16 AM
Account type	(237) Manufacturing Assessment Real Estate
Letter ID	L0355698640
Appeal period	December 31, 2023
Appeal explanation	
Appeal deposit	No
Prepared by	JOHN MANUFACTURING
Phone	(608) 222-3333
Email	jmanufact@company.com

[Print Confirmation](#)

[View Submission](#)

[OK](#)

# Resources





# MTA Resources



- ▷ Common Questions
  - Manufacturing specific – [revenue.wi.gov/Pages/FAQS/slf-mta-access.aspx](https://revenue.wi.gov/Pages/FAQS/slf-mta-access.aspx)
  - General (for businesses) – [revenue.wi.gov/Pages/FAQS/mta-using-mta.aspx](https://revenue.wi.gov/Pages/FAQS/mta-using-mta.aspx)
  
- ▷ Business videos
  - [youtube.com/playlist?list=PLWzuhzN1RU\\_9nmzATTJFZxpMerT3trz8K](https://youtube.com/playlist?list=PLWzuhzN1RU_9nmzATTJFZxpMerT3trz8K)
  
- ▷ DOR training page
  - [revenue.wi.gov/Pages/Training/Home.aspx](https://revenue.wi.gov/Pages/Training/Home.aspx)
  - Recorded version of this webinar posted within a week
  - Q&A from this webinar as a PDF

# Contact Us

- ▷ General MTA questions
  - [dormytaxaccounthelp@wisconsin.gov](mailto:dormytaxaccounthelp@wisconsin.gov)
  - (608) 261-5338
- ▷ Manufacturing specific MTA questions
  - Contact the district office in your area: [revenue.wi.gov/Documents/slfdoc.pdf](http://revenue.wi.gov/Documents/slfdoc.pdf)

# Thanks!

