Presenter(s)

Valeah Foy
Acting Deputy Administrator
State and Local Finance Division
Topics of Discussion

- Staff changes
- Division of state and local finance (SLF) overview
- General calendar
- Personal property aid
- My DOR Government Account
- Resources
Staff Changes
Secretary Peter Barca

- Most recently the State Representative for the 64th assembly district
- Served in Congress
- Midwest Regional Administrator of the U.S. Small Business Administration
- President of Aurora Associates International
Deputy Secretary David Casey

- More than 25 years in both public and private sector
- Consultant for state, city and county departments of revenue across the country
SLF Administrator – John Dickert

- Mayor of the City of Racine
- President/CEO of Great Lakes St. Lawrence Cities Initiative
- Residential and commercial real estate
- Political consultant
SLF Overview
Manufacturing & Utility

• District offices – Eau Claire, Green Bay, Madison, Milwaukee

• Manufacturing assessment – general property tax (local)
  o About 10,925 parcels of real property
  o About 9,300 personal property accounts

• Utility tax – state tax (exempt from general property tax)
  o Telephone, pipelines, airlines and railroads – ad valorem assessment
  o Light, heat and power companies – license fee on gross revenues
Equalization

• District offices – Eau Claire, Green Bay, Madison, Milwaukee, Wausau
• Equalized values – municipal and county
• Assessment compliance
• Assessment appeals (70.85)
• Tax incremental district values
• Chargeback and omit requests
• Annual assessor meetings and other training
Local Government Services

- Financial statements and reports
- Equalized values – schools, tech colleges, special districts
- Levy limits, property tax apportionments
- Tax increments
- Real estate transfer fees
- Managed forest land/forest crop withdrawal taxes
- State aids – shared revenue
- Property tax credits
Technical & Assessment Services

• Assessor certification and education
• Assessment standards
• Tax incremental finance
• Technology and application support
• Forms and application updates
General Calendar
General Calendar

May 6
• Distribute personal property aid

May 15
• Finalize 2018 levy limit penalties
• Extended filing deadline – MFR (all municipalities & counties)
General Calendar

June 3
• Filing deadline
  o PA-550: Personal Property Value Report
  o UT-144: Utility Company Assets Report

June 5
• Clerk, Treasurer and Finance Officer Institute
• Wisconsin County Treasurers Association
General Calendar

June 10
• Filing deadline – MAR and SOA (or after Board of Review)
• Post manufacturing full values

June 15
• Post 2018 SOA line summary report
• Post 2018 final Statement of Taxes

July 1
• Filing deadline – PE-300: TID Annual Report
General Calendar

July 22

• Distribute –
  o Exempt computer aid
  o School levy tax credit
  o First dollar credit
  o Expenditure restraint program aid
  o 15 percent of utility aid
  o 15 percent of county and municipal aid
General Calendar

July 31
• Filing deadline – Auditor's report and amended MFR (population over 25,000)
• Submit 2020 form and publication changes

August 1
• Post preliminary 2019 equalized, TID and net new construction values
General Calendar

August 7
• Deadline to provide DOR with any potential errors

August 15
• Post certified 2019 equalized, TID and net new construction values

August 28
• DOR posts county/municipal certificates of equalized value
General Calendar

September 4
• Post tax incremental certification report

September 7
• Post county and municipal levy limit worksheets

September 15
• Post 2019 revised and 2020 original shared revenue estimates
Personal Property Aid
Personal Property Aid

• Sec. 79.096, Wis. Stats.
• Starting in 2019, state will pay each taxing jurisdiction the amount of taxes levied on personal property – machinery, tools, and patterns – based on January 1, 2017 assessments
• First payment was May 6, 2019 (first Monday in May)
• 2019 payment estimates were posted August 15, 2018
Personal Property Aid

- Form PA-550: Personal Property Value Report
- Every municipality is required to e-file
- **Due date** – June 3, 2019
- 2017 locally assessed machinery, tools and patterns (Code 2)
- Report 2017 values by –
  - Municipality – total TID and non-TID
  - 2017 taxing jurisdictions within the municipality
  - 2017 TIDs and taxing jurisdictions within each TID
Personal Property Aid

- Accurate filing on Form PA-550 is extremely important
- DOR will use values reported to calculate 2020 aid
- 2020 aid estimates will be posted August, 2019
My DOR Government Account
MyDORGov

- 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

• 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
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.

<table>
<thead>
<tr>
<th>Form</th>
<th>Name</th>
<th>Due Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>PA-107</td>
<td>Board of Review Member Training Affidavit</td>
<td>Before Board of Review’s first meeting</td>
</tr>
<tr>
<td>PA-521</td>
<td>Statement of Assessment</td>
<td>June 11, 2018</td>
</tr>
<tr>
<td>PA-632A</td>
<td>Statement of Taxes</td>
<td>December 17, 2018</td>
</tr>
<tr>
<td>PC-201</td>
<td>Request for Charge Back of Rescinded or Refunded Taxes</td>
<td>October 1, 2019</td>
</tr>
<tr>
<td>PC-202</td>
<td>Tax Increment Worksheet</td>
<td>December 17, 2018</td>
</tr>
<tr>
<td>PC-205</td>
<td>Request for Sharing of Non-Manufacturing Omitted Property Taxes</td>
<td>October 1, 2019</td>
</tr>
</tbody>
</table>
Home Screen – no access

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 draf@wisconsin.gov or (608) 266-2149
Home Screen

- 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
# User Information

<table>
<thead>
<tr>
<th>User Profile 🎯</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Email:</strong></td>
<td><a href="mailto:valeah.foy@wisconsin.gov">valeah.foy@wisconsin.gov</a></td>
</tr>
<tr>
<td><strong>Name:</strong></td>
<td>Valeah Foy</td>
</tr>
<tr>
<td><strong>Phone:</strong></td>
<td>608-261-5360</td>
</tr>
<tr>
<td><strong>Fax:</strong></td>
<td>608-264-6887</td>
</tr>
</tbody>
</table>
| **Address:**   | 2135 Rimrock Road
                 | Madison, WI 53713 |

<table>
<thead>
<tr>
<th>Your Office Summary (granted by DOR) 🎯</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current offices held</strong></td>
<td></td>
</tr>
<tr>
<td>✖ Clerk</td>
<td>13251 CITY OF MADISON</td>
</tr>
<tr>
<td>✖ Tech</td>
<td>000900 MILWAUKEE AREA TECHNICAL COLLEGE MILW</td>
</tr>
</tbody>
</table>
User Information

• 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
Office Requests

- 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

• 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:
  o Review user's requests to file on your behalf
  o Remove their access
Help

• Using MyDORGov: [revenue.wi.gov/Pages/FAQS/slf-vault.aspx](revenue.wi.gov/Pages/FAQS/slf-vault.aspx)
  - Common questions
  - Videos

• System issues? Contact [otas@wisconsin.gov](otas@wisconsin.gov)
Resources
Email Updates

• Stay Informed!

• Receive email updates about law changes, filing reminders, updated reports and notifications

• To subscribe:
  o Municipal officials – revenue.wi.gov/Pages/HTML/lists.aspx
  o County officials – email: otas@wisconsin.gov
Resources

• DOR website – revenue.wi.gov
• Online videos – see DOR Video Center
  o Select "Government"
  o Examples: MyDORGov, eRETR, assessment topics, My tax account
• Annual calendar – revenue.wi.gov/slf/cotvc/tvccal.pdf
Resources (cont.)

- Wisconsin Property Assessment Manual –
  [www.revenue.wi.gov/Pages/HTML/govpub.aspx#property](http://www.revenue.wi.gov/Pages/HTML/govpub.aspx#property)
- Publications – [revenue.wi.gov/Pages/HTML/pubs.aspx](http://revenue.wi.gov/Pages/HTML/pubs.aspx)
- Reports – [revenue.wi.gov/Pages/Report/Home.aspx](http://revenue.wi.gov/Pages/Report/Home.aspx)
- Common questions –
  [revenue.wi.gov/Pages/FAQS/home-pt.aspx](http://revenue.wi.gov/Pages/FAQS/home-pt.aspx)
Questions/Comments/Suggestions?
Thank you!