

**WISCONSIN DEPARTMENT OF REVENUE
DIVISION OF INCOME, SALES, AND EXCISE TAX**

NOTICE OF PROPOSED GUIDANCE DOCUMENTS

Pursuant to sec. 227.112, Wis. Stats., the Wisconsin Department of Revenue, Division of Income, Sales, and Excise Taxes hereby seeks comment on the proposed guidance document listed in the table below.

SUBMITTING PUBLIC COMMENTS

Public comments on proposed or adopted guidance documents may be submitted online at: <https://www.revenue.wi.gov/Pages/contactUs/proposed-Guidance.aspx>.

DEADLINE FOR SUBMISSION

The period for public comment for proposed guidance documents ends 21 days after publication in the Administrative Register, unless the Governor approves a shorter commenting period.

Document Number	Document Title
100061	How to Use Wisconsin e-File - Common Questions

State of Wisconsin
Department of Revenue

How to Use Wisconsin e-File

This is a proposed guidance document. The document has been submitted to the Legislative Reference Bureau for publication in the Administrative Register for public comment as provided by sec. 227.112(1), Wis. Stats.

1. What is Wisconsin e-file?
2. What are the benefits of using Wisconsin e-file?
3. What do I need before I begin to use Wisconsin e-file?
4. How do I begin using Wisconsin e-file?
5. Is there a registration process to use Wisconsin e-file?
6. How do I move through/navigate Wisconsin e-file?
7. If I owe an amount, can I e-file my return now, but go back later to decide how to pay?
8. Is there a limit on how much time I have to complete and e-file my tax return using Wisconsin e-file?
9. What happens if I make a mistake using Wisconsin e-file?
10. Must I round to the nearest dollar amount?
11. How do I sign my income tax return using Wisconsin e-file?
12. How do I know the Wisconsin Department of Revenue has received my income tax return?

13. [Can I file my income tax return using Wisconsin e-file after April 15?](#)
 14. [Can I file my prior income tax returns using Wisconsin e-file?](#)
 15. [Who do I contact if I have a question while using Wisconsin e-file?](#)
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1. **What is Wisconsin e-file?**

Wisconsin e-file is the system almost any full-year, part-year or non-resident of Wisconsin can use to electronically file a Wisconsin income tax return. Wisconsin e-file is free and available 24 hours a day, seven days a week.

2. **What are the benefits to using Wisconsin e-file?**

Wisconsin e-file:

- o Allows you to prepare and e-file your return through the department's secure website
- o Gives you a confirmation number immediately, so you know your tax return has been received
- o Reduces mistakes because the math is done for you, plus the program will compute your net tax and credits
- o Provides line item help and instructions
- o Allows you to print and/or save your tax return
- o Allows you to use direct deposit, so your refund is received faster
- o Allows you to pay an amount owed by direct withdrawal, on the day you specify
- o Allows for a paperless filing of your tax return

3. **What do I need before I begin to use Wisconsin e-file?**

- o Your completed federal income tax return
- o Your W-2, W-2G and 1099 forms
- o Your financial institution account number and routing number, if you choose direct deposit for your refund or direct withdrawal for an amount owed
- o Your credit card information, if you choose to pay an amount owed by credit card. Accepted cards are: American Express, Discover, MasterCard and VISA
- o Your completed and signed rent certificate and/or property tax bill, if you are claiming homestead credit

You must enter the data from your W-2s and 1099s into the Wisconsin e-file W-2s and 1099s.

If you file a Form 1 or 1NPR, you must [attach](#) a complete copy of your federal income tax return to your electronic return.

If you claim any of these credits, you must submit required documents using the [!\[\]\(0d5ec72f61334709c3fc9450209b754f_img.jpg\) Form W-RA](#) within 48 hours of e-filing or you may [attach](#) them to your Wisconsin e-file return:

- o [Homestead credit](#);
- o Net tax paid to another state credit;
- o Eligible veterans and surviving spouse property tax credit; or

- o Farmland preservation credit.

After you have submitted your electronic return, you should:

- o Print and/or save a copy of your return
- o Keep copies of the W-2s, 1099s and other documents used to complete your return
- o Keep all tax records and documents at least four years

4. **How do I begin using Wisconsin e-file?**

- a. Go to revenue.wi.gov/Pages/WI-efile/home.aspx.
- b. Open the INDIVIDUALS tab. Under ONLINE SERVICES, click on the WI e-file icon. From the list, choose the form you would like to complete, and start the filing process.

5. **Is there a registration process to use Wisconsin e-file?**

No. There is no registration process.

You may use Wisconsin e-file if you:

- a. Have a valid social security number or individual tax identification number (ITIN); and
- b. Meet the [qualifications](#).

6. **How do I move through/navigate Wisconsin e-file?**

You can move through and to your desired forms/fields within Wisconsin e-file by:

- o using your scroll bar to move from top to bottom or bottom to top of each page;
- o using Tab on your keyboard to go to the next field;
- o clicking your mouse pointer to select a field; or
- o using the arrow buttons on the toolbar to go from page to page.

7. **If I owe an amount, can I e-file my return now, but go back later to decide how to pay?**

No. You have to decide by choosing one of the following ways to pay the amount you owe before you can e-file your return:

- o **Direct Debit/Withdrawal** — You must provide the routing number of your financial institution, your account number, plus the date you want to make your payment, up to April 15. If it's after April 15, you have to pay on the day you e-file your return.
- o **Pay Online** — You can pay using the department's free, online service.
- o **Pay by Credit Card** — You can use American Express, Discover, MasterCard or VISA. A convenience fee will be charged (none of the fee goes to the department). You have to pay the same day you set up the credit card payment.

- Pay by check or money order — You have to complete and print a  [Form EPV](#) (Electronic Payment Voucher). Send this form, along with your payment to the address listed on the form.

8. Is there a limit on how much time I have to complete and e-file my tax return using Wisconsin e-file?

No. There is no time limit.

If you cannot complete your tax return, before closing your return you must save it in a portable document format (PDF) to your computer or other storage device (disk, CD, flash drive, etc.) by clicking "File" and "Save as".

If you do not save your tax return to your computer or other storage device, your return will be lost and you will need to start over from the beginning.

9. What happens if I make a mistake using Wisconsin e-file?

You can correct any mistakes at any time before you submit your tax return. Simply type over or erase any mistakes.

If you realize you have made a mistake *after* you have submitted your return, you will have to file an amended return. You can file an amended return using Wisconsin e-file. You would use the same form you used to originally file, unless you are amending to file on the correct form. Check the box above the taxpayer information line to indicate it is an amended return and be sure to attach the Schedule AR.

10. Must I round to the nearest dollar?

Yes. To round to the nearest dollar amount, you need to:

- Drop amounts under 50 cents; and
- Increase amounts 50 cents to 99 cents.

11. How do I sign my income tax return using Wisconsin e-file?

You (and your spouse, if married filing joint) have to:

- Read the Signature Statement on the last page of the application; and
- Click the "Yes" button.

12. How do I know the Wisconsin Department of Revenue has received my income tax return?

You have to click Submit Return after any mistakes have been fixed and you are ready to e-file.

You will be given a confirmation number after your return has been successfully submitted. Your return has *not* been e-filed until you receive your confirmation number. You should print and save this number for four years.

Before you close your e-filed tax return, you should print and/or save your return in a portable document format (PDF) to your computer or other storage device (disk, CD, flash drive, etc.) by clicking "File" and "Save as".

13. Can I file my income tax return using Wisconsin e-file after April 15?

Yes. Wisconsin e-file is available for you to use after April 15. To avoid any late filing fees, you need to have a valid extension of time to file. Please remember that you may be subject to interest, penalties and other fees for late filing and nonpayment or late payment of your tax liability.

14. Can I file my prior income tax returns using Wisconsin e-file?

You are able to Wisconsin e-file for any open tax year.

15. Who do I contact if I have a question while using Wisconsin e-file?

- Email: DORElectronicFiling@wisconsin.gov (include your name and daytime phone number)
- Phone: (608) 264-6886 - 7:45 a.m.-4:30 p.m. Monday-Friday
- Visit: [DOR Offices](#)

Applicable Laws and Rules

This document provides statements or interpretations of the following laws and regulations in effect as of February 11, 2020: Sections 71.01, 71.03, 71.738 and 71.80, Wis. Stats., and secs. Tax 2.04 and 2.10, Wis. Adm. Code.

Laws enacted and in effect after February 11, 2020, new administrative rules, and court decisions may change the interpretations in this document. Guidance issued prior to February 11, 2020, that is contrary to the information in this document is superseded by this document, pursuant to sec. 73.16(2)(a), Wis. Stats.

FOR QUESTIONS OR COMMENTS CONTACT:

WISCONSIN DEPARTMENT OF REVENUE

Electronic Filing Unit

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Madison, WI 53708-8949

Income Tax Customer Service Phone: (608) 266-2486

Business Tax Customer Service Phone: (608) 266-2776

Customer Service Fax: (608) 267-1030

Email additional questions to DORElectronicFiling@wisconsin.gov

Guidance Document Certification: <https://www.revenue.wi.gov/Pages/Certification-Statement.aspx>

Guidance Document Number: 100061

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