

Electronic Filing

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1. What is electronic filing?

Electronic filing is a method of filing tax returns where the taxpayer information is transmitted to the revenue agencies electronically over the Internet, a modem, or a phone line.

2. Why should I electronically file my tax return?

Electronic filing offers the taxpayer many benefits that cannot be achieved through paper filing, such as:

- Faster refunds using direct deposit
- Accuracy -- you or a tax preparer enters the information and confirms that it is correct
- Acknowledgment of receipt
- Speeds up processing
- Reduces costs for the Department of Revenue which saves you tax dollars
- Security

3. What are the costs involved in electronic filing?

The costs will vary according to your choice of electronic filing method. Many tax professionals prefer e-filing and encourage their clients to use it by not charging an additional fee. Other tax professionals incorporate the e-filing fee into their cost of doing business. Off-the-shelf software can vary in price from approximately \$30 to \$50. Online filing will also vary in price from approximately \$10 to \$40. You may be eligible for free [online filing](#) or [Wisconsin Free-File](#).

4. How long does it take to electronically file my return?

Simple returns can be prepared and transmitted in approximately 20 minutes. More complicated returns can take up to 2 hours.

5. Is electronic filing secure?

Yes. No one sees your tax information except you, your tax professional (if applicable), the IRS, and the Wisconsin Department of Revenue. There are no worries about delivery or paper shuffling or inappropriate

people seeing your personal or financial information. Internet companies that provide web-based tax preparation use the industry standard Secure Sockets Layer (SSL) protocol to encrypt your personal data.

6. Will my chances of being audited increase if I electronically file?

No. However, you will be notified within 24 hours if there is a mistake on your electronic return. The IRS reviews e-filed returns and rejects those with errors related to social security number, name, or address mismatch.

7. Do I have to electronically file my federal and state income tax returns at the same time?

No. Wisconsin is a "piggyback" state. This means that Wisconsin's electronic filing program works in conjunction with the federal electronic filing program. If you file online or through a tax preparer, you can file both your federal and state income tax returns together. If you e-file your federal return, you can still e-file your Wisconsin return at a later time, if your software supports state-only returns. The Wisconsin Free-File and TeleFile programs are only for filing Wisconsin state individual income tax returns.

8. Can all income tax forms and schedules be filed electronically?

The following Wisconsin forms and schedules can be filed electronically:

1. All federal individual income tax forms and schedules allowed by the IRS appears in their publication Handbook for Electronic Filers (IRS Publication 1345)
2. Form 1, Wisconsin Income Tax Return
3. Form 1A, Wisconsin Income Tax Return
4. Form WI-Z, Wisconsin Income Tax Return
5. Schedule FC, Farmland Preservation Credit
6. Schedule H, Wisconsin Homestead Credit Claim
 - Rent Certificate and Shared Living Expenses
 - Property Tax/Sale of Home Information
 - Homestead Credit Notes
7. Schedule I, Adjustment to Convert 2003 Federal Adjusted Gross Income and Itemized Deductions to the Amounts Allowable Under the Internal Revenue Code
8. Schedule MS, Manufacturer's Sales Tax Credit
9. Schedule MT, Wisconsin Alternative Minimum Tax
10. Schedule RS, Recycling Surcharge
11. Schedule WD, Capital Gains and Losses
12. Schedule U, Underpayment of Estimated Tax by Individuals and Fiduciaries

13. Schedule 2440W, Wisconsin Disability Income Exclusion
14. Schedule EIC-A, Wisconsin Earned Income Credit Qualifying Children
15. Wisconsin Forms require an accompanying copy of the taxpayer's federal return. The software developer will fulfill this requirement by copying the federal data into the unformatted records of the state packet before transmitting returns to the IRS.

Note: Software companies may not support all schedules above.

9. Can sales and use tax returns be electronically filed?

Yes. The Department of Revenue currently has two options available for electronic filing of your sales and use tax returns.

- The Department of Revenue provides its own free Internet-based filing option called Sales Internet Process (SIP). SIP performs calculations, provides a history of your electronically filed returns, provides a receipt and allows you to make your tax payment by Electronic Funds Transfer. More information is available at www.dor.state.wi.us/eserv/sip.html. To apply for a logon ID and password go to www.dor.state.wi.us/forms/sales/s-002.pdf.
- The Department of Revenue also provides a File Transmission option. File Transmission provides a direct electronic interface between your system and the Wisconsin Department of Revenue. More information on how the File Transmission process works is available at www.dor.state.wi.us/faqs/s-trans.html.

10. Is electronic filing completely paperless?

Wisconsin returns that include Homestead or Farmland Preservation Credit Claims will be required to send form W-RA with required attachments.

The Electronic Return Originator (ERO) or taxpayer must retain all income statements, such as W-2, W-2G, and 1099-R forms, normally attached to a paper return, for four years. The Department of Revenue may request these documents from the ERO or taxpayer at a later date.

In all other instances, signature documents with attachments must be mailed to this Department, as follows:

ERO Prepared Return and Online Filed Returns

For returns that include a homestead credit claim, the ERO or taxpayer must mail form W-RA * along with all the required attachments (W-2s, W-2Gs, 1099-Rs, original rent certificate(s) or copies of the 2003 property tax bill(s) payable in 2004, homestead credit notes, schedules, deeds, legal documents and statements, and all Schedule H attachments listed in the 2003 Schedule H instructions) to:

When using the U.S. Postal Service

Wisconsin Department of Revenue
P.O. Box 34
Madison WI 53786-0001

When using a private mail service provider

Wisconsin Department of Revenue
Mail Opening - Mail Drop 1-151
2135 Rimrock Road
Madison, WI 53713

For returns that include a farmland preservation credit claim, the ERO or tax payer must mail Form W-RA * along with all the required attachments (W-2s, W-2Gs, 1099-Rs, and all other real estate tax bills, Schedule FC attachments listed in the 2003 Schedule FC instructions) to:

When using the U.S. Postal Service

Farmland Preservation Unit
Wisconsin Department of Revenue
P.O. Box 8967
Madison, WI 53708-8967

When using a private mail service provider

Wisconsin Department of Revenue
Mail Opening - Mail Drop 1-151
2135 Rimrock Road
Madison, WI 53713

* Form W-RA is provided by your tax professional or is part of your software package or web-based filing program. It may be printed from your computer.

Electronic Returns with Amount Due

If you owe money, you will need to send Form EPV (Electronic Payment Voucher) with payment to:

Wisconsin Department of Revenue
PO Box 2942
Milwaukee, WI 53201-2942

Telefile Returns

Telefile is paperless, unless you have tax due or the Wisconsin Department of Revenue requests information.

If you owe money you will need to send Form TPV (Telefile Payment Voucher) with payment to:

Wisconsin Department of Revenue
P.O. Box 2942
Milwaukee, WI 53201-2942

11. When can I electronically file my 2003 income tax return?

You can file any time between January 16 and October 15, 2004. However, if you file after April 15, 2004, you must file a federal extension with the IRS. Wisconsin TeleFile is available from January 15 through October 15, 2004. Wisconsin Free-File is available from January 20, 2004 through October 15, 2004.

12. How do I electronically file my income tax return?

Wisconsin promotes several types of e-filing for individual income taxes. They are professionally prepared electronic returns, online filing, Wisconsin Free-File, and TeleFile.

- Professionally prepared electronic returns involve a tax professional. The tax professional collects your income tax information, prepares your tax return, and transmits the return to the Internal Revenue Service (IRS) and the Wisconsin Department of Revenue. See [Electronic Filing Through a Tax Professional](#) for more information.
- If you have access to a computer with a modem or an Internet connection, online filing can be done in one of two ways.
 - You can purchase off-the-shelf tax preparation software that includes an option for electronic filing.
 - You can go to the web site of a software company that transmits tax returns. The software prepares your tax return for you and performs the mathematical calculations as you

supply the answers to simple interview questions. When you have completed the interview process, you will be prompted to submit your return. If you choose to do so, you will be asked for payment at that time. Some off-the-shelf software now includes the price of transmitting tax returns electronically. **Note:** Not all software supports Wisconsin e-filing. See the information concerning [web-based filing](#) and [off-the-shelf or downloaded software](#).

- To TeleFile, taxpayers file their tax return by using a touch-tone telephone. For more information relating to Wisconsin's TeleFile program, check out [Wisconsin TeleFile of Individual Income Tax Returns](#).
- To file electronically using [Wisconsin Free-File](#)

13. How do I get help?

To get help with your software program, review the instructions, access the help menu, or call the software developer. For help preparing your taxes, call the Wisconsin Department of Revenue taxpayer assistance number (608) 266-2772 or e-mail us at income@dor.state.wi.us. For specific help with electronic filing, call (608) 264-6886 or e-mail us at efiling@dor.state.wi.us. For more information, review the [options](#) on the Wisconsin Department of Revenue web site.

14. How do I know the Department of Revenue received my electronically filed return?

Within 24 hours of transmission, you or your tax preparer will receive an IRS acknowledgment of receipt of your return. You or your tax preparer will receive the state acknowledgment within 72 hours of the original transmission. The state and federal revenue agencies issue acknowledgments in the form of electronic messages. Acknowledgments are transmitted to the software company and they are made available either to you, if filing online, or to your tax preparer. Wisconsin Free-Filers and TeleFilers will receive a confirmation number at the end of their filing process.

15. If I do not receive an acknowledgment within three days of transmitting my return, how do I find out what happened to my return?

First, make sure your software supports Wisconsin filing. If your software package or the online web site you've chosen *does* support Wisconsin filing, call the software company or inquire online. If you are working with a tax preparer, call your preparer. You may also call the Electronic Filing Office at the Wisconsin Department of Revenue. The E-Filing Help Line is (608) 264-6886.

16. If I realize that I made a mistake after I transmit my electronic return, what do I do?

The only way to correct an electronic return once it has been transmitted is to file a paper Wisconsin Amended Tax Return, Form 1X. Amended returns **cannot** be filed electronically. The Form 1X is available on our [Individual Income Tax Forms](#) page.

17. I did not receive a Form 1099-G or misplaced it, but I did receive a refund. What is the Payer's name, address and ID number?

The payer's name is the Wisconsin Department of Revenue. The federal identification number is 39-6006491 and the Wisconsin state identification number is 052202. The mailing address is Wisconsin Department of Revenue, Mail Stop 5-77, PO Box 8949, Madison, WI 53708-8949.

18. If my spouse died in 2003, can I file electronically?

Yes, you can. If you are filing as surviving spouse, you have to use the in care of line. If you are not filing as surviving spouse, you need to fill in Form 1310.

19. Can I use direct deposit?

Yes. If you use Wisconsin Free-File, a tax professional or an online software product, you may have your refund direct deposited. Refunds associated with electronically filed returns are usually received in the taxpayer's bank account within one week. If your refund is delayed for any of the reasons listed in the answer to [Question 21](#), direct deposit of your refund is not possible. A paper check will be issued if you are due a refund. The direct deposit option is **not** available for TeleFile.

20. If I electronically file my income tax return, how long will it take to get my refund?

If you select the direct deposit option, you could receive your refund in as few as three business days compared to several weeks if filing on paper. If you choose to receive a paper check, the check will usually be issued within one week. For TeleFile, refunds are usually issued within a week.

21. If I filed electronically but did not receive my refund as quickly as I expected to, what might be the cause of the delay?

Certain conditions will delay refunds and may change refund amounts. This happens with refunds from electronically filed returns as well as with refunds from paper returns. Some possible reasons for refund delays:

- The proper Homestead Credit attachments were not mailed timely.
- The taxpayer or spouse owes delinquent Wisconsin taxes. *
- The taxpayer or spouse owes a debt to another Wisconsin state agency. *
- The taxpayer or spouse owes a debt to counties or municipalities in Wisconsin. *
- The estimated tax payments claimed on the return do not match the estimated tax payments recorded on the Department of Revenue estimated tax file.
- The refund or balance due amount is adjusted when the electronic return is processed.
- The return acknowledgment contained one or more error codes.
- The return must be reviewed before the refund can be issued. Returns with earned income credit or homestead credit may be reviewed.

* To avoid delays, clear your debts before electronically filing your return.

If your refund is delayed for any of the above reasons, direct deposit of your refund is not possible. A paper check will be issued if you are due a refund.

22. How do I find out about my refund?

If you have not received your state refund from an electronically filed return within ten days of the original transmission date, call the Refund Inquiry Help Line at (608) 266-8100 in Madison or (414) 227-4907 in Milwaukee. This is an automated system. Do not call the system more than once a week. To use the system, you must know your social security number and the expected amount of refund. If after three weeks you still do not have your refund, call the Refund Inquiry Help Line and select the option to speak to a representative.

You can also check on your refund online by filling out the [Internet Refund Inquiry](#) form.

23. If I electronically file my return early and I owe taxes, when do I have to pay?

You can file your income tax return as early as you like and, if you owe taxes, pay your bill on or before April 15, 2004.

24. If I electronically file my tax return on the due date and I owe taxes, when is the payment due?

You must mail your payment to the Department in an envelope postmarked on the due date to avoid interest and delinquent tax collection fees.

25. Can I pay my income taxes by credit card?

Yes. The Wisconsin Department of Revenue does allow taxpayers to pay state income taxes by credit card. For more information, see [Credit Card Payments](#).

26. Can I use direct debit to pay my income taxes?

No. The Wisconsin Department of Revenue does not allow state income tax bills to be paid through direct debit (electronic withdrawal from checking or savings accounts). However, the IRS **does** allow you to pay your federal taxes by direct debit. Visit the [IRS web site](#) for more details.

27. Can I use electronic funds transfer to pay my taxes?

Yes. You can pay all your taxes through the electronic funds transfer method, but you must pre-register before you attempt to make a payment. See [Electronic Funds Transfer](#) for registration information.

28. If I have a balance due on my electronically filed return, where do I send the payment?

For returns prepared using **Wisconsin Free-File, a tax preparer, or an online software product**, use the payment voucher (Form EPV) that is provided by the software. For returns submitted using Telefile use the payment voucher (Form TPV) that is provided in your telefile booklet. Make sure the payment voucher is for tax year 2003, indicated in the upper left corner. Mail the voucher and the payment to the address below:

Wisconsin Department of Revenue
P.O. Box 2942
Milwaukee, WI 53201-2942

FOR MORE INFORMATION PLEASE CONTACT:

WISCONSIN DEPARTMENT OF REVENUE
Electronic Filing Unit
P.O. Box 8949
Madison, WI 53708-8949
Income Phone: (608) 264-6886
Sales Phone: (608) 261-6261

Fax: (608) 266-9829

[E-Mail Additional Questions](#)

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