

**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.

<b>Document Number</b>	<b>Document Title</b>
<b>100146</b>	Claim Forms and Instructions - Common Questions

State of Wisconsin  
Department of Revenue

## Claim Forms and Instructions

**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. How can I submit a claim for property?
2. Who is the claimant?
3. What are the relationship types for property owners?
4. Why hasn't my claim form been processed yet?
5. Where do I send my claim form and additional documents?
6. Why is my claim refund coming from the Wisconsin Department of Revenue?
7. I do not have all of the required documents to submit with my claim. What should I do?
8. Why am I being asked to provide additional information after I've submitted my claim?
9. Why was my refund less than I claimed?

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### 1. **How can I submit a claim for property?**

You must complete your claim through My Tax Account to initiate your claim. Paper claims are no longer accepted.

To fill out your claim on our website, begin your search through My Tax Account.

Any property you find during the search can be added to your claim. Please follow the instructions and filing tips provided. To expedite the processing of your claim, please provide all of the information requested during the claims process. You have the option to save your claim and finish it later, if needed. Your claim is not complete and cannot be reviewed until all required documents are provided.

Once you submit your claim, you will see a confirmation screen. Be sure to click on the "Printable View" button as this produces a copy of your claim in .pdf format. The claim document includes important information that you should print or save for your files, such as the claim confirmation number and property being claimed. If additional documents are

required, the claim document also provides an attachment inventory that tells you what you must submit. To ensure timely processing of your claim, you must include the Attachment Inventory page with any additional documents mailed to the department.

If you are unable to complete your claim via our website, you may also call us at (608) 264-4594. Select option 1 to initiate a claim and a letter requesting your documents will be mailed to you.

## 2. **Who is the claimant?**

The claimant is the individual claiming the property, whether for themselves or as an heir to the owner identified on the property.

## 3. **What are the relationship types for property owners?**

If your name appears on the property record for the property you are claiming, then you may be the reported owner. This is the most common relationship type. All of the possible relationship types and definitions are listed below.

Business – your business is the owner of the property and your business name appears on the property record and your business has all rights to the ownership of the property.

Creditor – you received a judgment from a court allowing you to claim the property of the listed owner.

Government – your government agency is listed as the owner of unclaimed property or your government agency is making a claim against their debtor's unclaimed property.

Guardian – you have been appointed by a judge to take care of a minor child (called a "ward") or incompetent adult personally and/or manage that person's affairs who has unclaimed property.

Heir – you are entitled through a legal determination to receive property of a deceased person either by will or under the laws of descent and distribution.

Reported Owner - you are the single owner for the property and your name appears on the property record and you have all rights to the ownership of the property.

Uniform Gift No Longer Minor – you had property gifted to you as a minor under the Uniform Gifts to Minors Act – (UGMA). You are the named owner of the property and have now reached the age of majority.

Uniform Gift Minor – you are the named Custodian or Trustee of a property that was gifted to a minor under the Uniform Gifts to Minors Act – (UGMA).

## 4. **Why hasn't my claim form been processed yet?**

Claims are processed as quickly as possible, once we receive all of the information required to process the claim. At certain times of the year, the number of claims submitted is high and it may take up to 8 weeks for you to receive your payment. We recommend you use the [check the status of your claim](#) on our website.

## 5. **Where do I send my claim form and additional documents?**

If you have to provide additional documents for your claim, please use one of the following methods:

- Secured Electronic Upload at: <https://tap.revenue.wi.gov/UCPAddInfo/> /  
You will need either your claim or confirmation number.
- Fax to: (608) 261-6799
- Mail: Please send all documents with the barcoded Attachment Inventory letter to the address below:

Wisconsin Department of Revenue  
Unclaimed Property Unit  
PO Box 8982  
Madison, WI 53708-8982

If you do not send the barcoded Attachment Inventory letter along with your documents, we may be unable to locate your claim to associate your documents.

**6. Why is my claim refund coming from the Wisconsin Department of Revenue?**

The Wisconsin Department of Revenue administers the Unclaimed Property program for the State of Wisconsin. Your claim refund notice will say "Notice of Refund – Unclaimed Property" to differentiate it from another tax refund.

**7. I do not have all of the required documents to submit with my claim. What should I do?**

You can save your claim and finish it later. Please print a copy of the confirmation page as it contains a confirmation code that you will need to resume your claim. Note: You can upload additional documents for your claim securely at <https://tap.revenue.wi.gov/UCPAddInfo/> / . You will need your claim or confirmation number.

**8. Why am I being asked to provide additional information after I've submitted my claim?**

We make every attempt to process your claim using the information provided with the claim. If we cannot process your claim, we will send you a letter asking for additional information. Please follow the instructions in the letter to expedite the processing of your claim.

**9. Why was my refund less than I claimed?**

Wisconsin statutes authorize the department to collect debt for Wisconsin state agencies, counties, and municipalities, the federal government (including the Internal Revenue Service), other states, and federally recognized tribes. Your Notice of Claim Refund will provide details about the debts owed to other government agencies. These offsets cannot be appealed to the department's Unclaimed Property Unit; however, you should contact the collecting agency regarding the offset if you have any questions.

## Applicable Laws and Rules

This document provides statements or interpretations of the following laws and regulations in effect as of November 27, 2019: Sections 71.93, 71.935, 177.01 and 177.24, Wis. Stats.

Laws enacted and in effect after November 27, 2019, new administrative rules, and court decisions may change the interpretations in this document. Guidance issued prior to November 27, 2019, 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

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Email additional questions to [DORUnclaimedProperty@wisconsin.gov](mailto:DORUnclaimedProperty@wisconsin.gov)

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