

Taxpayer Access Point (TAP) Industrial Property Reporting
Frequently Asked Questions

FILING AND VIEWING REPORTING FORMS 2

 How do I file my industrial property reporting form? 2

 What is meant by ‘Steps’ in my reporting form? 2

 How do I add an asset? 2

 What do the different items in the asset details screen mean? 2

 How do I complete the General Ledger asset table? 2

 When I select an asset table from the summary page, the ‘Add’, ‘Update’, ‘Transfer’ and ‘Delete’ checkboxes are not functional. How do I make changes to my assets? 3

 I’ve completed my information on the reporting form but it says ‘This step must be corrected before moving on’. How do I find my errors? 3

 How can I save my reporting form and finish it later? 3

 Can I sort assets within a Step to make it easier to find and edit my assets? 3

 How do I use the Import/Export feature? 3

 Can I transfer an asset from one property to another? 4

 We sold a property but not all of the assets located on the property. What do I do? 4

 Where do I find a previously filed reporting form? 4

 How do I change my saved reporting form? 4

 Why can’t I make changes or enter information after saving my reporting form? 4

 What does the ‘Withdraw’ button in TAP do? 5

 I have submitted an Industrial Property Reporting form in TAP. How can I tell if it has been processed or find its status? 5

 How do I amend a previously filed Industrial Property Reporting form? 5

 I submitted my Industrial Property Reporting form, but realized I made a mistake. Can I correct it? 5

FILING AND VIEWING REPORTING FORMS

How do I file my industrial property reporting form?

Follow these steps to file a reporting form:

1. Login to your TAP account
2. Select your Industrial Property Reporting Account ID
3. Select File Report next to the period you wish to file
4. Follow the steps until you have successfully submitted the filing and received a confirmation screen

What is meant by 'Steps' in my reporting form?

In TAP, asset tables are categorized as 'Steps'. Next to each 'Step' you will see an asset table description. These 'Steps' are where you will find the assets that have been reported in prior years and where you will make changes to an asset. Each 'Step' must be reviewed and the checkbox within the 'Step' must be checked, even if there are no assets.

How do I add an asset?

1. Select the 'Step' for the correct asset table
2. Scroll to the bottom of the list of assets
3. Select Add an Asset
4. Complete all required fields
5. Select Add

What do the different items in the asset details screen mean?

- Equipment Type drop-down menu – select the item in the list that most closely describes the asset that you are reporting
- Description is a free-format field and is intended for entry of the property description that you are reporting
- Equipment Class – select the asset class that is closest to the property you are reporting
- Installed Year is the year that you purchased the asset. If this is an older asset and you no longer have the acquired date, provide your best estimate
- Installed Cost is the cost paid for the asset plus costs to get the asset placed and operating
- Plant Location drop-down menu – select the plant location where the asset is located
- Property Number drop-down menu – select the property number where the asset is located. The Property Numbers in the drop-down menu will match the Property Numbers in the Property Summary Table
- Asset # - is the number that you have supplied in past years as your asset identification number

How do I complete the General Ledger asset table?

- Enter the undepreciated costs from your prior year and current year balance sheets in the applicable general ledger columns. Please include all 'Non-current Assets' account from your balance sheet. Also include 'Material & Supplies' from the 'Current Assets' account of your balance sheet.
- Enter the Net Book Cost (less Book Depreciation) of your assets amount from your balance sheet

When I select an asset table from the summary page, the ‘Add’, ‘Update’, ‘Transfer’ and ‘Delete’ checkboxes are not functional. How do I make changes to my assets?

Changes cannot be made on this screen; these checkboxes are for reference only. To make changes to an asset, follow the steps below:

1. Select the [Property ID](#) link for the desired asset
2. Select the appropriate checkbox (update, transfer or delete) within the asset actions section
3. Enter the required fields and make any changes necessary
4. Select [OK](#)

I’ve completed my information on the reporting form but it says ‘This step must be corrected before moving on’. How do I find my errors?

- Errors may be yellow or red fields. Red is incorrect information in a field. Yellow is required information that must be entered to continue
- All fields with errors, whether yellow or red, will have a triangle in the upper left hand corner
- Errors may also be indicated by a red circle with an exclamation point. This indicates that the step either has an asset in error or the ‘Step’ has not been reviewed
- Enter the ‘Step’ showing the error and select the [Show Errors](#) link
- If there are no assets in error, assure that you have marked the ‘review’ checkbox
- All errors must be corrected before you are able to submit a reporting form

How can I save my reporting form and finish it later?

Follow these steps to save a reporting form and finish it later:

1. Select the [Save and Finish Later](#) button
2. Enter your password and Select [OK](#)
3. A Confirmation screen will appear

Can I sort assets within a Step to make it easier to find and edit my assets?

Yes, to sort assets within an asset table in TAP:

- Select your primary sort criteria and select the column header containing the chosen criteria
- To perform a second level sort, hold down the CTRL key and select the column header containing the criteria

How do I use the Import/Export feature?

The Industrial Property Reporting forms are large and can be time-consuming to hand enter, so we have created the ability for you to export the property reporting forms to your computer’s Excel spreadsheet.

This will allow you to edit the information at your convenience.

1. Select [Export to Excel](#)
2. Save the file to your computer
3. Save your progress in TAP by selecting [Save and Finish Later](#)
4. Make the changes needed to the downloaded spreadsheet, adding and/or deleting assets as needed
5. Do not add or delete columns or change the formatting of the spreadsheet you exported. If you make changes to the spreadsheet’s layout, it will not import correctly into TAP

When you have finished making changes to the property spreadsheet you can import the data back into TAP by following the steps below:

1. Log into your TAP account
2. Perform the necessary corrections and review the required checkboxes to move through the process, until you see the ‘Import/Export’ option on the Summary Screen

3. Select **Import from Excel**
4. Select **Choose File** and navigate to your saved file
5. Select the saved file and select **Open**
6. Select **Import**
7. Your TAP reporting form will be updated immediately. Review each step and mark the review checkbox until all errors are corrected
8. If you get an import error it may be due to the fact that you inadvertently made changes to the layout of the spreadsheet. You will need to start this process over at the **Export to Excel** step 1

Can I transfer an asset from one property to another?

Yes, to transfer an asset from one property to another:

1. From within the asset table, Select the **Property ID** link of the asset you need to transfer
2. Mark the 'Transfer to another property' checkbox
3. Select the appropriate **Property ID** in the Asset Details
4. Correct any errors and complete any required information
5. Select **OK**

We sold a property but not all of the assets located on the property. What do I do?

1. In the Properties screen, select the **Property Number** link you wish to delete
2. Check the **Delete** checkbox to delete the property and select **OK**. All assets that were associated with this property will now be marked as deleted.
3. Check the checkbox stating that you have reviewed the properties
4. Select **Next**
5. Select each asset table and update the assets as needed.
6. Assets that have been marked as deleted, can be reinstated and transferred to a new location by unchecking the **Delete** checkbox, and marking the **Transfer** checkbox and selecting a new Property Number

Where do I find a previously filed reporting form?

1. Login to your TAP account and select the **Account ID** to view a previously filed reporting form
2. Select the **Account ID** for the report you would like to view
3. Under the Requests tab, select link for the period reporting form you would like to view
4. If you do not see previously filed returns, select the **Change Date** tab and enter an earlier date

How do I change my saved reporting form?

1. Login to TAP
2. In the My Accounts tab, click on the blue Account ID link you want to change
3. Assure that the All Periods tab is selected
4. In the All Periods tab, click on **View Request** for the period you want to change
5. Click on **Change** to continue working in your reporting form
6. When you are finished, click on **Submit** to submit your final reporting form

Why can't I make changes or enter information after saving my reporting form?

If you have saved your reporting form, you will need to select **Change** before you will be able to enter any information, make any changes or submit your reporting form.

What does the 'Withdraw' button in TAP do?

If you wish to remove your TAP reporting form and begin a new one, you can select **Withdraw**. Selecting Withdraw will remove all changes that you have made to your reporting form.

I have submitted an Industrial Property Reporting form in TAP. How can I tell if it has been processed or find its status?

1. Login to your TAP account and select the **Account ID** that you would like to view the reporting form status of
2. Select the **Account ID** to view the reporting form status
3. Select the **Requests** tab
4. Select the **Search** tab. If the status says:
 - **Stored** – you have not submitted the reporting form to be processed. Select the title link, and then select **Change** on the left side of your screen. From here you can complete your reporting form and select **Submit** to file with the MT Department of Revenue
 - **Pending** – The reporting form is waiting to be uploaded to our main tax system, which occurs at 5pm each day. A reporting form can be changed if the status is Pending
 - **Complete** – The reporting form has been loaded to our main tax system. If changes need to be made, you will need to contact the industrial appraiser named in TAP between the hours of 8:00 a.m. and 5:00 p.m. MST. You can find the appraiser's name within the property number link

How do I amend a previously filed Industrial Property Reporting form?

Industrial Property Reporting forms cannot be amended through TAP. If you find that you have made an error, contact the industrial appraiser named in TAP between the hours of 8:00 a.m. and 5:00 p.m. MST. You can find the appraiser's name within the property number link.

I submitted my Industrial Property Reporting form, but realized I made a mistake. Can I correct it?

Submitted reporting forms can be changed until 5pm on the day of submission.

To make changes to a submitted reporting form within the time limit, follow these steps:

1. Login to TAP
2. Select Account ID from your Home Page
3. Select View Request for the return you need to update
4. Select Change

If you were unable to make your change prior to that time, please contact the industrial appraiser named in TAP between the hours of 8:00 a.m. and 5:00 p.m. MST. You can find the appraiser's name within the property number link.
