

Taxpayer Access Point Personal Property Reporting

Frequently Asked Questions

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FILING AND VIEWING REPORTING FORMS

How do I file my personal property reporting form?

Follow these steps to file a reporting form:

1. Login to your TAP account, select the Personal Property Reporting **Account ID** for the county you would like to complete the reporting form for.
2. If you report property in multiple counties, select the My Personal Property Accts tab.
3. Select the **Account ID** for the appropriate county report that you would like to file.
4. Select **File Report** next to the period you wish to file.

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

In TAP, asset tables are set apart 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**.

Where do I report my livestock numbers?

Livestock owners will not report livestock numbers with their personal property as in previous years. A convenient online process is now available for per capita fee reporting and billing. For more information regarding 2015 livestock reporting, go to ReportYourLivestock.mt.gov.

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

- Asset # is a new field and assists you in matching items from year to year. This is your tracking or asset number.
- Location is the physical location of the asset.
- Table/Sub Table 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 a description of the property that you are reporting.
- Acquired 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.
- Total Acquired Cost is the price that you paid for the asset.
- Company ID refers to the equipment identification number.
- Meets Lease/Rental criteria – to determine if you should check the meets lease/rental checkbox, the equipment must meet all of the following criteria:

- Lease and rental property is owned by a commercial establishment whose primary business is the leasing and renting of property on an hourly, daily, weekly, semi-monthly or monthly basis
- No one customer accounts for more than 10% of the total rental during a calendar year
- The acquired cost of each rental item is less than \$15,000

What types of equipment need to be reported?

Select the links below to find what kinds of equipment need to be reported:

- [Furniture, Fixtures and Miscellaneous Equipment](#)
- [Heavy Equipment](#)
- [Manufacturing and Mining Equipment](#)
- [Farm and Ranch Equipment](#)
- [Oil and Gas Equipment](#)

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?

Since the Personal Property Reporting forms are large and can be time-consuming we have created the ability for you to export the property reporting forms to your computer. 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.

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.

When I select an asset table from the summary page, the 'Personal', 'Deleted', 'New' and 'Updated' 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**.

Can I transfer an asset from one property to another?

Follow these steps to transfer an asset from one property to another:

1. 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**.

Can I transfer an asset from one county to another?

To transfer an asset from one county to another, the asset must be added to the new property using the steps below:

1. Log into your TAP account.
2. Select the **Account ID** link for the county where the asset is located where the asset is currently located.
3. Select the asset class Step and select **Add an Asset**.
4. Add all assets that are now located on this property.
5. Select **Save and Finish Later**.
6. Return to the county **Account ID** and asset table where the asset was originally located.
7. Select the **Property ID** link for the appropriate asset and select the **Delete** checkbox.
8. Repeat this step until all assets have been added to the property where they are currently located.

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

Follow these steps:

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 with the deletion of the property can be reinstated and transferred to a new location by unchecking the **Delete** checkbox, marking the **Transfer** checkbox and selecting a new Property Number

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.

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. If you report property in multiple counties, select the **My Personal Property Accts** tab.

3. Select the **Account ID** for the county report you would like to view.
4. Under the **Requests** tab, select the **Personal Property Reporting** link for the period reporting form you would like to view.
5. If you do not see previously filed returns, select the **Change Date** tab and enter an earlier date.

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.

How do I change my saved reporting form?

1. Login to TAP.
2. In the **My Accounts/My Personal Property Accts** 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 a Personal 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** for the county you would like to view the reporting form status.
2. If you report property in multiple counties, select the **My Personal Property Accts** tab.
3. Select the **Account ID** to view the reporting form status.
4. Select the **Requests** tab.
5. 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 specific county Department of Revenue Property Assessment office in which the property is located.

I have submitted a Personal Property Reporting form in TAP. How do I return to my list of accounts?

To return to your list of Personal Property Reporting accounts select the Home link from the menu bar and select the My Personal Property Accts tab.

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

Personal Property Reporting forms cannot be amended through TAP. If you find that you have made an error, contact the local Department of Revenue Property Assessment office in which the property is located. [Property Assessment Offices](#)

I submitted my Personal 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 local Department of Revenue Property Assessment office in which the property is located.
