

# Electronic Real Estate Transfer Return Overview

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## 1. Introduction

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This document provides an overview of the electronic real estate transfer return system (eRETR). If this is the first time you are electronically submitting a real estate transfer return (RETR), take a few moments and carefully review these instructions.

### eRETR:

- This system makes it easy to submit a complete and correct return. Use eRETR if you are an individual, title company, attorney or other preparer needing to complete a transfer return.
- Information you provide is secure and confidential. The website encrypts information as it travels over the Internet. Social security numbers and federal tax identification numbers cannot be accessed by anyone other than an authorized Wisconsin Department of Revenue (DOR) employee.
- For complete information about real estate transfers, visit our [Real Estate Transfer Fee page](#), which contains the instructions for eRETR, links to eRETR instructional videos and relevant statutes, and other information.

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## 2. Filing a RETR

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### A. Steps

- 1) **Complete the online form** – complete all sections of the eRETR
- 2) **Submit form** – after you complete all sections in the return, click the "Submit" button from any page. This sends the information to the county Register of Deeds and generates the eRETR receipt page. Print the eRETR receipt page. **Note:** The return is not *recorded* until step 4.
- 3) **Mail or deliver the eRETR receipt page, deed and payment to county Register of Deeds** – the receipt includes instructions for delivering the receipt, payment, and deed (or document of conveyance) to your county Register of Deeds
- 4) **County Register of Deeds records the property transfer** – you will receive an email after the deed and RETR are recorded

## B. Difference between submitting and recording

### Submit

When you click "Submit," your return is sent to the county Register of Deeds and eRETR generates your eRETR receipt page. Print the eRETR receipt page. The RETR becomes part of the official record when the county Register of Deeds records the deed. The Register of Deeds uses the eRETR receipt to determine which RETR is associated with the deed.

- **Summary page** – shows all the information electronically transmitted to the county Register of Deeds
- **Receipt**
  - You must deliver or mail your eRETR receipt and RETR fee, with the deed (or other document of conveyance), to the county Register of Deeds. The eRETR receipt has delivery instructions.
  - You must also provide a copy of the eRETR receipt to all grantors and grantees

**Example:** You completed a RETR, clicked "Submit" and printed the eRETR receipt. After reviewing the receipt, you notice that some information is incorrect. In this case, you would complete a new RETR, click "Submit" and mail the new eRETR receipt (with the deed and payment) to the county Register of Deeds. You would discard the first eRETR receipt. Since you sent the second eRETR receipt with the deed, the county Register of Deeds associates that RETR with the deed being recorded. **Note:** You do not have to create a new RETR from scratch; the save and restore feature allows you to load a previously-saved RETR.

### Recording

This happens after you deliver or mail the RETR to the county Register of Deeds. The county Register of Deeds records the transfer when he or she receives the new deed. In other words, *recording* can only occur after the Register of Deeds receives your RETR receipt, fees and deed (or document of conveyance).

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## 3. Features

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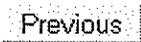
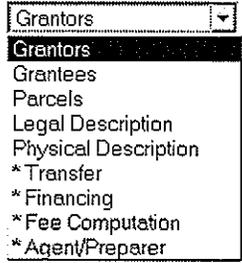
### A. Buttons – below are the buttons in eRETR

<input type="button" value="Next"/> <input type="button" value="Previous"/>	Always use these buttons instead of your browser's "Back" and "Forward" buttons
<input type="button" value="SUBMIT"/>	When the button is green, you can click to send the transfer to the county Register of Deeds
<input type="button" value="Update"/>	Calculates totals and checks the current section for errors
<input type="button" value="Add"/> <input type="button" value="Delete"/>	Add or remove a repeating group (ex: use "Add" to add an additional grantor)
<input type="button" value="Save"/> <input type="button" value="Restore Saved Information"/>	Save your RETR and restore a previously saved electronic return
<input type="button" value="Quit"/>	Quits the application, discarding unsaved changes

### B. Time Clock – this is a 30-minute clock for security. It resets to 30 minutes each time you change a page, select "Next," "Previous," or "Update."

Remaining time:

**C. Navigation** – there are two ways to move from one section to another:

 	<p>Use these buttons at the top of each page to move to the next or previous section. Do <i>not</i> use your Web browser's "Back" and "Forward" buttons.</p>
	<p><b>Dropdown menu</b></p> <ul style="list-style-type: none"> <li>• Each page has a drop-down menu that lists each section</li> <li>• Allows you to go directly to a section</li> </ul> <p><b>Incomplete sections</b></p> <ul style="list-style-type: none"> <li>• Drop-down list shows the sections you have not visited or ones with stop signs</li> <li>• In effect, this provides a "to do" list of sections where you need to provide information</li> <li>• <b>Example:</b> In this dropdown menu, the first five sections are complete. The asterisk (*) next to the other sections shows they were not visited or are incomplete.</li> </ul>
 <p><b>Light bulb</b></p>	<p>If you are unsure what is needed, click the light bulb for useful information</p>
 <p><b>Stop sign</b></p>	<p>If you see a stop sign, you need to fix the field. Click the stop sign to see the error.</p>

**D. Save and restore**

You can fill out part of the RETR, save it and finish the return later.

Saving and restoring your return allows multiple people to work on different sections of the return. **Example:** You could start the RETR, enter and save your information. The next person can then load the saved version, add information, save and submit it.

**Note:** Use the saved version if you made a mistake and need to create a new return. In this case, re-enter the eRETR system and select "Restore Saved Information," load the saved file and make your changes. When your RETR is complete, click the "Submit" button.

**4. Email**

The eRETR system allows you to enter the email address of grantors, grantees, agents and the preparer. When the deed (or document of conveyance) is recorded by the county Register of Deeds, the eRETR system sends a notice to those email addresses. The notice provides a link with the RETR. To view the RETR, you must enter the receipt number, total value of the real estate transferred, and the last name of one grantor or grantee.

**5. "Review" section**

This is the last section that lists:

- Grantor and grantee responsibilities related to the property value and exemption code
- Grantee information related to whether the property is the primary residence

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## 6. Common questions

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### A. What is the difference between "submitting" and "recording"?

"Submitting" occurs when you click the "Submit" button. This sends the electronic RETR to the county Register of Deeds. "Recording" is done by the county Register of Deeds when he or she receives the new deed. In other words, *recording* can only occur after you sent the eRETR receipt, fees, and deed (or document of conveyance) to the Register of Deeds.

### B. Can I change the RETR after I click "Submit"?

Yes. If you need to change the RETR, use the save and restore feature. This allows you to upload the information into eRETR, make the changes and re-submit. The Register of Deeds uses the eRETR receipt to associate the RETR with the deed. (If you submit the return more than once, make sure you print and send the correct receipt with the deed.)

### C. How do I know the return was recorded?

When the county Register of Deeds records the deed (or document of conveyance) the eRETR system automatically sends you an email confirming the transfer return and deed were recorded.

### D. I am a title company or attorney. What if I do not have all the information until closing?

Use the save and restore feature. How you gather the information at closing is up to you, but one convenient way is to use your browser's print feature to print pages with missing information. Bring those pages to the closing and have the filers fill in what is missing. After the closing restore the information (using the restore feature), enter the information provided and submit the return.

If you have a computer available at the closing and have access to a saved version, you can go to eRETR, use the "Restore Saved Information" button, and enter the information immediately.

### E. I am a title company or attorney. Do I need to gather signatures?

No. The Wisconsin Department of Revenue (DOR) and the county Register of Deeds do not require signatures.

Regardless of who prepares the electronic real estate transfer return, the grantor and grantee are responsible for the information. When the preparer clicks "Submit," the grantors and grantees can read about their responsibilities on the receipt pages, and may view the entire RETR online.

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## 7. System requirements

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To use eRETR you must have a computer with Internet access and a printer. Most Internet browsers work with eRETR. If you make changes to your browser's default setup, do not disable cookies and do not disable JavaScript.

1. Go to: [www.revenue.wi.gov/retr/index.html](http://www.revenue.wi.gov/retr/index.html)
2. Read instructions.
3. Once you have read instructions, click "Submit an eRETR".
4. Any questions, send an email to: [eretr@revenue.wi.gov](mailto:eretr@revenue.wi.gov)

**ELECTRONIC REAL ESTATE TRANSFER RECEIPT**

WISCONSIN DEPARTMENT OF REVENUE  
INSTRUCTIONS

1. Grantors and grantees must review this receipt, noting grantor and grantee responsibilities.

Mail or deliver the following items to:

*Washington County Register of Deeds, 432 E WASHINGTON ST, PO BOX 1986, WEST BEND, WI 53095-7986*

2.
  - This receipt page, along with a transfer fee of \$0.00.
  - The deed or instrument of conveyance, along with a recording fee of \$30.00 regardless of the number of pages.
  - Either the weatherization Certificate of Compliance, Stipulation or Waiver form<sup>3</sup>

To view the details of the real estate transfer return online, go to <https://ww2.revenue.wi.gov/RETRWebPublic/application>. You will need to know the receipt number, the total value of the real estate transferred, and the last name of one grantor or grantee.

Receipt #: \_\_\_\_\_ Filed \_\_\_\_\_ - Washington County, Conveyance date \_\_\_\_\_

Value transferred \_\_\_\_\_ Transfer fee \_\_\_\_\_

Value subject to fee \_\_\_\_\_ Fee exemption number \_\_\_\_\_

Grantors \_\_\_\_\_

Grantees \_\_\_\_\_

Tax bill address \_\_\_\_\_

Property Location \_\_\_\_\_

Parcels \_\_\_\_\_

Short legal description \_\_\_\_\_

Grantor responsibilities: Grantors are responsible for paying the proper fee amount—verify the total property value, fee amount and fee exemption before sending this receipt to the county Register of Deeds.<sup>1</sup>

Grantee responsibilities: Grantees assert that this property is a primary residence<sup>2</sup>, and that the property is subject to weatherization standards.<sup>3</sup>

Preparer \_\_\_\_\_

Grantor agent \_\_\_\_\_

Grantee agent \_\_\_\_\_

If you have any questions about the Real Estate Transfer Return visit the Real Estate Transfer Web site at <http://www.dor.state.wi.us/retr.html>. You can also contact your County Register of Deeds (see <http://www.wrdaonline.org/>).

Information on the real estate transfer return is used to administer Wisconsin's laws of income tax, real estate transfers, rental unit energy efficiency, lottery tax credit and general property tax. The transfer of Wisconsin real estate in a taxable transaction must be reported on your Wisconsin income tax return. This is true whether you were a resident, a part-year resident, or a nonresident of Wisconsin. If you are a nonresident of Wisconsin, you must file Form 1NPR to report the sale.

1 Penalties for use of an improper exemption are imposed per s. 77.26(8), Stats. Penalties for falsifying the property value are imposed per s. 77.27, Stats.

2 Penalties for improperly claiming the Lottery & Gaming Credit as Primary Residence are Imposed per Chapter Tax 20.19.

3 Penalties relating to Weatherization claims are imposed per s. 101.122. Stats.