

MMTA Winter Workshop

Tax Tips and Tricks



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Agenda/Topics

- Contact customer support
- Taxpayer Requests for Information
- Reminder Bills (new options)
- Payoff Amounts
- Wild card search character
- Including Interest in Refunds
- Manage Report Library
- Direct imports – special assessments and various items
- ‘Sequentially Search for Various Fields’ report and searching reports
- Blocking and marking
- Table searches
- Payment Utilities
- Report Queries and Report Designer

Contact Customer Support

By phone:

517-641-8900 or 855-BSA-SOFT (855-272-7368)

Email:

taxsupport@bsasoftware.com



Contact Customer Support

Via program:

Help > Contact Technical Support > Request Support Phone Call

BS&A Technical Support Request

Use the form below to submit a technical support request to the Tax support team. Upon submitting your request a Tax support specialist will contact you shortly.

Contact Information

* Full Name:

* Phone #: Ext:

Email:

How can we help?

Reporting Parcel Adjustments Journalizing/Posting Payments to GL

New Database Setup Import/Export Payment Questions (Reversals/Refunds)

General or Not Listed

Description: (1,000 character limit)

Attachments:

File Name	Remove
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Taxpayer Requests for Information

Most common requests can be found under the Print icon of the Edit Parcel screen:

Choose Report to Print

Please select one of the following:

- Tax Bill
- Tax Receipt
- Detailed Tax Certification
- Legal Description Synopsis
- Mailing Labels
- Taxes Billed/Paid for Summer/Winter
- Taxes Billed/Paid for Summer/Winter/Village
- Taxes Billed/Paid for Summer/Winter (All Payments Listed)
- Taxable/PRE/MBT % Adjustment Affidavit
- Adjustment Report
- Deferment Application (Current Season)
- Payment List Report

OK Cancel

Reminder Bills (new options)

- Reports > Bills > Reminder Bill
- New options for 'Use Custom Payoff Dates'

Reminder Bill - Options

Additional Report Options

Use Custom Payoff Dates Include Past Payments

Payoff Date: 01/31/2018 02/14/2018 02/28/2018

Exclude DNR-PILT Parcels Exclude Bills with Zero Tax Exclude Paid Tax Bills

Property Types: Real & Personal Property Exclude Deferred Parcel

Tax Bill Type: Current Bill - All Adjustments Included

**** Barcode Printing Options ****

Print Bar Code

Bar Code Format: Standard Bar Code to be read directly into Equalizer Tax System or E [HELP](#)

Exclude Mortgage Codes

From: To:

Exclude Billing Codes

From: To: [Edit Tax Bill Msg...](#)

Close

Providing Payoff Amounts

'Calculator' button on Edit Parcel screen:

The screenshot shows the 'Edit Parcel' screen with a 'Tax Information' section. A red circle highlights a calculator icon next to the 'Left to Pay' amount of 187.49. A red arrow points from this icon to a 'Tax Payoff Calculator' window that is open in the foreground.

Tax Information

Specials:	0.00
Tax:	178.65
Int/Pen:	8.84
Total:	187.49
Receipts:	0.00
Left to Pay:	187.49

Tax Payoff Calculator for Parcel 140-018-200-005-00, Summer Season

Parcel Information

Parcel Number:	140-018-200-005-00	Total Tax Billed:	187.49
School:	18060	Total Payments:	0.00
Class:	401	Total Due:	187.49

Address Information
SCHMUNSLER LARRY G
1101 GREENWOOD
LANSING MI 48906

Payoff Estimate

Payoff Date:	01/05/2018	02/01/2018	03/01/2018
Base Tax Due:	176.89	176.89	176.89
Admin Fee Due:	1.76	1.76	1.76
Penalty Due:	0.00	0.00	5.31
Interest Due:	8.84	10.61	10.61
TOTAL:	187.49	189.26	194.57

Auto Update Payoff Dates [HELP](#)

Close

'Wild Card' Search Characters

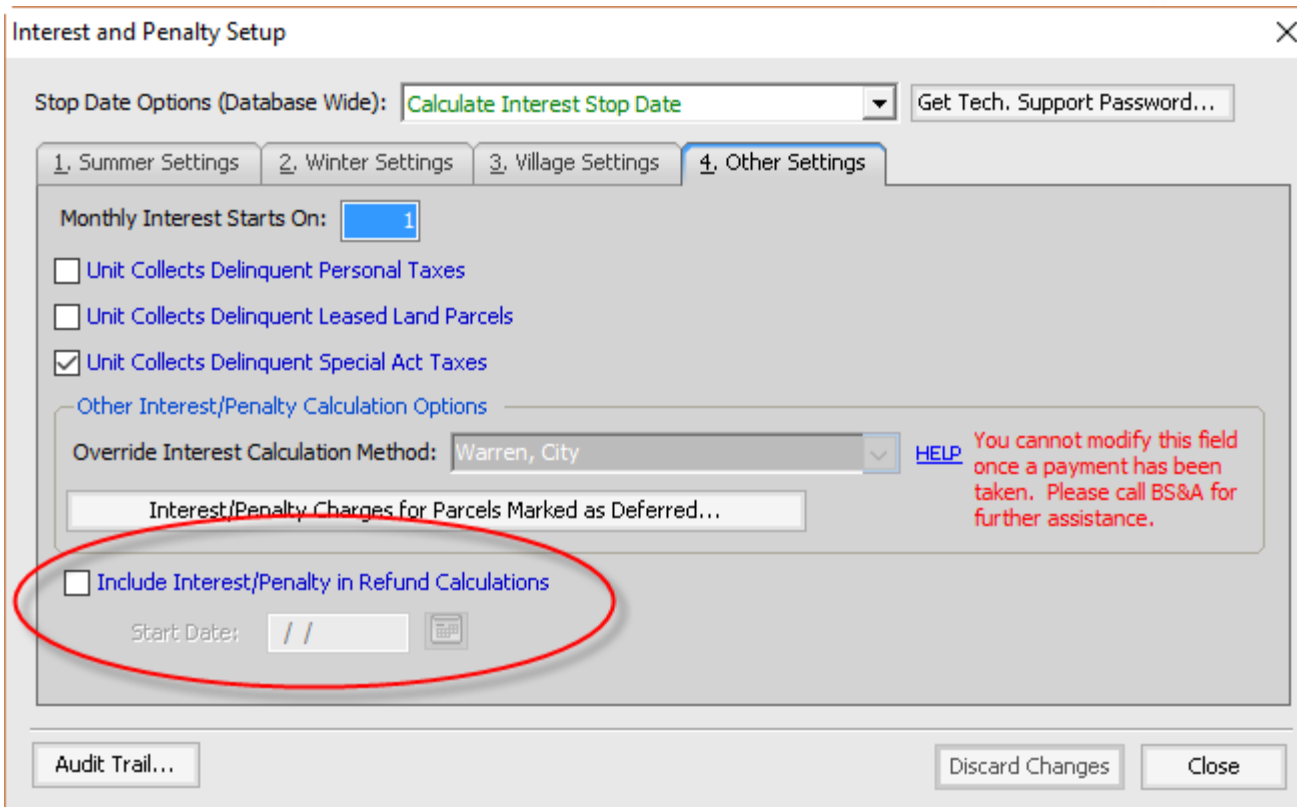
The asterisk (*) acts as a wild card when doing parcel searches

- SMITH
returns any name starting with Smith
- *SMITH
returns any name ending with Smith
- *SMITH*
returns any name containing Smith

Including interest in refunds

By default, program does *not* refund interest on fully paid parcels

To do so requires a program option:



Interest and Penalty Setup

Stop Date Options (Database Wide): **Calculate Interest Stop Date** Get Tech. Support Password...

1. Summer Settings 2. Winter Settings 3. Village Settings 4. Other Settings

Monthly Interest Starts On: **1**

Unit Collects Delinquent Personal Taxes

Unit Collects Delinquent Leased Land Parcels


Unit Collects Delinquent Special Act Taxes

Other Interest/Penalty Calculation Options

Override Interest Calculation Method: **Warren, City** [HELP](#) You cannot modify this field once a payment has been taken. Please call BS&A for further assistance.

Interest/Penalty Charges for Parcels Marked as Deferred...

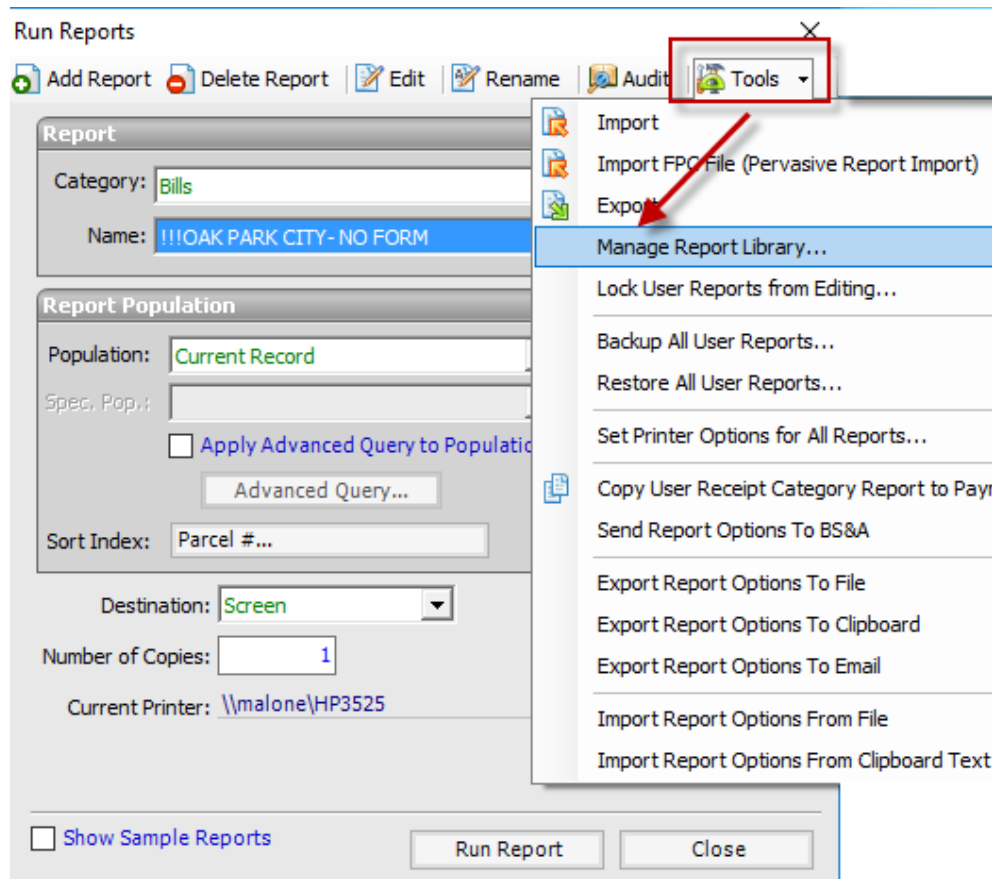
Include Interest/Penalty in Refund Calculations

Start Date: // 

Audit Trail... Discard Changes Close

Manage Report Library

- Tools button in the Run Reports window
- Allows for hiding of unused reports (user-specific)



Direct Imports

- File > Import > Various Imports...>
- Standard Special Assessment Import from Another Equalizer Tax System
or
- Various Items From Another Equalizer Tax System
(mortgage/billing codes, deferment flags, comments, email address, user alpha fields, etc)

'Sequentially Search for Various Fields' report

- Under Reports > Balancing/Settlement Reports

Sequentially Search For Various Fields - Options

Additional Report Options

<input type="checkbox"/> List All Overpayments	<input type="checkbox"/> List All Splits/Combinations
<input type="checkbox"/> List Questionable Taxable Values	<input type="checkbox"/> List All CFA/CFR Property
<input type="checkbox"/> List All Inactive Parcels	<input type="checkbox"/> List All Partial PRE/MBT %
<input type="checkbox"/> List All Deferments	<input type="checkbox"/> List Questionable Payments
<input type="checkbox"/> List Parcels that have Interest Only Left to Pay	<input type="checkbox"/> List Parcels that Bill only Spec Assessment
<input type="checkbox"/> List Parcels with negative Intrst/Penlty Balance	<input type="checkbox"/> List Parcels with questionable Admin Fee
<input type="checkbox"/> List Parcels with Taxable Value but No Taxes Billed	<input type="checkbox"/> List Parcels with more than 10 Special Assessments
<input type="checkbox"/> List Parcels with Foreclosures Not Paid	<input type="checkbox"/> List Parcels with Interest/Penalty Overrides
<input type="checkbox"/> Use Range of Taxable Value Filter	<input type="checkbox"/> List Parcels with SET Overridden

Low Taxable Amount: High Taxable Amount:

Use Range of Tax Billed Feature

Low Tax Amount: High Tax Amount:

Include Interest/Penalty

Close

Blocking and Marking

Means of identifying a set of records that we may want to include in a report or utility.

- Block – contiguous set of records
- Marked Records – allows for non-contiguous records. Also allows for re-sorting the table without losing the marked records (not true of a Block)

Blocking

- 'Block Start' button
- Right click menu
(Right click on first record, choose 'Block Start', right click on last record, choose 'Block End')
- Shift + click
(Click on first record, hold Shift and click on last record)
- Quick Block button

Marking

Make sure you start with a clean slate first
(Mark > Unmark All Records)

- Spacebar
- Quick Mark button
- Ctrl + click
- Count button

Marking and Blocking used together

Say you want a report of all payments taken in July, but *excluding* a certain batch (7) from that month:

- Block the entire month (by date)
- Mark that block (Mark > Mark Current Block)
- Index by Batch #, block the batch to exclude
- Unmark that block (Mark > Unmark current block)
- Run report on Marked Records

Table Searches

Can search for data in the 'Sort Index' column by simply typing it

SMELTEKOP WALTER	007-017-002-20			
SMITH ALTON L III	007-004-003-00			
SMITH ALTON L III	007-004-003-10			
SMITH ALTON L III	007-004-003-30			
SMITH BRADFORD A	007-019-004-70			
SMITH JEFF & KARY	007-007-005-10			
SMITH L A FAMILY	007-006-001-10	LIMITED PARTNERS		
SMITH L A FAMILY	007-006-003-00	LIMITED PARTNERS		
SMITH L A FAMILY	007-006-003-20	LIMITED PARTNERS		
SMITH LIVING TRUS	007-015-009-00			
SMITH TREVOR & SU	007-012-007-00			
SNELL C ERIC REVO	007-018-003-50			
SNIDER STEVE & MA	007-015-004-20			
SOFT FURNISHINGS	007-900-021-00		JENNIFER SKINNER	
SORLEY TAMARA V	007-019-004-25		32961 COUNTY ROA	
SPAULDING JOSEPH	007-007-030-02			
SPENCER JOSHUA &	007-029-016-00			
SPLIT TO 006-015-C	007-006-015-00			

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Searching For: **SMIT** ←

Payment Utilities

Utilities > Accept Barcoded Payments En Masse

- Can be used with or without a barcode scanner
- If paying something other than the current season, can enter %S (summer) or %W (winter) to control the season

Utilities > Add Group of Payments En Masse

- Allows for paying a population of parcels (Block, Marked records, etc)
- If paying a block, can also mark records in that block to exclude them