Managing Tax Bill Flags
(PA482 of 2012) Notification of Delinquent Prior Year Bills in Your Pontem® Property Tax Software

INTRODUCTION

Manage Tax Bill Flags is a tool contained in Pontem's Tax Administration and Tax Receipting software designed to facilitate identifying real parcels where the prior year tax bill/s were delinquent and turned over to the county treasurer in March.   After using this tool, a notification alerting the tax payer to this situation will print on his/her tax bill.

This document describes the use of **Manage Tax Bill Flags** which can be found in the **Tools** tab of two Primary Tasks: **Prepare Tax Bills** and **Tax Bills and Collections.**

When tax roll calculations are done (and before printing bills and rolls), names and addresses should be updated to ensure any name changes are accounted for on current tax billf. As part of your pre-print procedures, add to your checklist **Manage Tax Bills Flags** to pick up any last-minute updates to the delinquent status of your parcels.   This tool can be run as many times as necessary.

The notification flag can be assigned to a bill directly from Pontem Delinquent Tax data in your county database, or by importing an ASCII file which contains the parcel numbers for real property where the prior year tax bills are delinquent. When an ASCII list of unpaid delinquents is required it can be provided by the county treasurer.

Getting Started

Notice in the screen on the top of the next page you can elect to assign the flag for an entire tax year's bills, *if they exist at the time this tool is run.* Using the tax year after creating Summer and Village tax bills will not automatically cause the Winter tax bills to be flagged when they are calculated in the fall.

However, all bills in township/village tax periods with a delinquent bill from the prior year would be flagged for the notification.

If there is an update of delinquencies available before you begin printing tax bills (from a new ASCII file or from the direct link to Pontem's Delinquent Tax software, run the **Managing Tax Bill Flags** tool again before printing to get the latest information. Remember, you may run it as many times as you like until you have made all corrections or selections necessary before printing your tax bills.

Update Options

'From DT Records in this Database'

When setting the flag using 'From DT Records in this Database' the tool will pull bills with an unpaid status from the prior year only. These were transferred to Pontem's Delinquent Tax software after March settlement.   A 'Delinquent Proof Report' can be run from Pontem Delinquent Tax to match the list and count of bills which are eligible to be flagged.

REMINDER: When tax roll calculations are done and before printing bills and rolls, names and addresses should be updated to ensure any changes are accounted for on the current bill. As part of your pre-print procedures add to your checklist **Manage Tax Bill Flags** to pick up any last-minute updates to the delinquent status of your parcels. This tool can be run as many times as necessary.

When there are Summer (Sxx) and Village (Vxx) bills, run this tool using the *tax year* to include both the calculated Village and Summer tax bills.

If bills have had partial or full payments applied – they will appear in the **Preview** list for updating of the flag (see below):
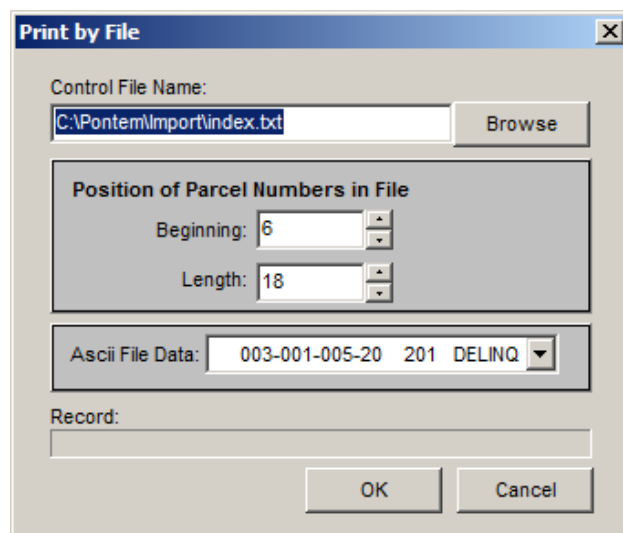

Please note, the two records listed above will be treated differently. Parcel Number 010-001-013-00 received a partial payment since the current bills were flagged. It will remain flagged for the delinquent notice to be included on the current tax bill. The bill for Parcel Number 010-001-018-00 will no longer be flagged because it was paid in full and has dropped off the list of bills as you will see in the screen below:

Load Parcel List from ASCII

This option allows users to import parcel numbers for which the current tax bill must be flagged for notification of delinquent prior year bills. Pontem has always believed our users should be able to interact with data using files generated by other software sources. This option supports that belief.

Browse for the (unzipped) ASCII file.   Increment the 'Beginning Position' by clicking on the up arrow until data appears in the field labeled 'ASCII File Data.' This is the position in the file where the parcel number begins. It is likely this will be '1.'   The field labeled 'Length' defines how many characters are in the parcel number.   Click **OK**.

Configure the Notification Message

To edit the message which will print on the flagged tax bills select **Tax Roll Set Up | Tax Unit General Info (for the appropriate tax period record) | Delinquent** and click on the **Edit** button at the top of the screen. This will enable the message box labeled: '**Tax Bill Message for Prior Year DT**.' The message by default is: "2012 taxes were turned over as delinquent to the County Treasurer." Here you may customize the message, or add treasurer contact information as required, click **Save.**

The button labeled 'Copy to All' is used to replicate this message on all of the tax unit records for the selected tax period. **Note:** Both Village and Summer tax period messages must be edited on this tab.

Test print current tax bills known to have been flagged as having a tax bill go delinquent in the prior year before printing your bills. Make any adjustments necessary.

For your information, here is a sample bill showing where the delinquent tax statement message is located:

Users with a custom tax bill will need to call the Pontem Help Desk to update their custom template to add this message. Please call a member of our Support Team toll-free at 888.237.8531 for assistance.

If you send a file to the printer for printing tax bills using the **Tax Bill Export File – Print Service** option, the new message is located in the last data column. If you require a document describing the file layout for your print service, please contact the Pontem Software Help Desk.

Providing ASCII File Delinquency Lists to Taxing Units That Print Their Own Tax Bills

You can provide an ASCII list of real delinquent parcels to local units which are printing their own tax bills using a special export in Pontem Delinquent Tax.

In DT, select **File | Export Unpaid Delinquent List.** Select 'Export type - Standard ASCII Format.' Enter the tax year for the DELINQ status bills. Include the 'Tax Unit/s' for which you want to create the ASCII files.

If you elect to create a zip file, it will be named for example, 'UnPdDTB2012001.zip'. (The software names the file by adding the year to the name based on Tax Year entered into the filter, and includes the unit number.) The name of the text file inside the zip file that will be created in the example above will be 'UnPdDTB2012001.txt.'

Selecting the option **Create Files in Separate Folders** will place the export file described above in your configured export directory (usually 'C:\Pontem\Settlement\2012\001') as a .txt file.

Pontem Tax Receipting

If your current tax roll has been generated by Pontem's Tax Administration software
Load County Tax Rolls will bring in the flag for the notification on the necessary tax bills as long this tool was used when your tax rolls were calculated.

If you find you need your tax bills flagged, you can ask the county for an ASCII file which you can import by going to **Tax Bills and Collections | Manage Tax Bill Flags** and following the Instructions in this document (before printing your tax bills).

Technical Support…

If you require additional assistance in managing tax bill flags or have questions about your Pontem Property Tax software, please don't hesitate to contact a member of our Support Team. Our goal is to help you get the most out of your Pontem Software investment. We would be happy to help.

Pontem Help Desk

Call **888.237.8531** toll-free
Submit an online support request at: http://www.pontem.com/Support-1
Email: support@pontem.com