PROPERTY TAX

Designed for government entities such as municipalities and school districts, the AccuFund Property Tax Billing module allows the user to manage tax assessments for many different types of property. These properties can be categorized as either real (land, buildings) or personal (automobiles, motorcycles, trailers).

Property Tax Billing allows you to download data from county, state or assessors' records and maintain extensive information on properties and customers. Property tax payments are posted directly to a customer and can be integrated with utility billing. Tax payment activity is linked to customer information in the database, so you can ensure your records are correct. Most importantly, total data entry time is cut in half, allowing you to expedite delivery of tax bills.
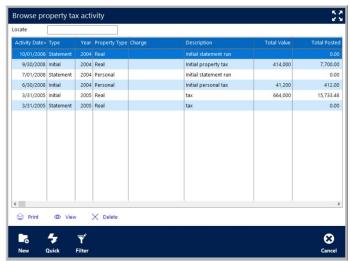
OVERVIEW

The AccuFund Property Tax Billing module has an open format, which allows you to convert easily from another system, make alpha-numeric inputs and add data fields on-the-fly. Multiple assessments can be performed according to various tax values and tax years.

Unlimited calculations are possible without performing additional programming, which means you can create calculations that are unique to your entity, such as surcharges and penalties.

A complete online history of tax activity can be maintained and linked to the customer database for the AccuFund Accounting Suite. As a result, you can perform all interest or penalties calculations on past year activity as well as current year.
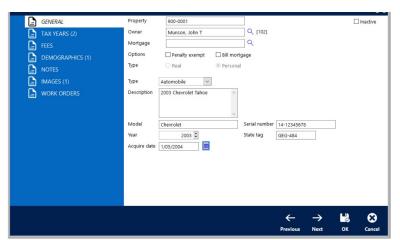
Property Tax Billing can produce a report on any transaction or activity, and all the data in the database can be included. Quick Reports convert what is on the screen to a report or export, sorted by any column. The Reports button runs any defined report for properties, tax activities and customers.

The Report/Forms Designer enables you to create customized statements, full-size 8 ½ x 11 letters , mailers and other reports. Users can generate an entire tax run or reprint any individual statement in a tax run.

The Tax Activity Screen lets the user see each step of the billing process beginning with estimated, through initial billing and to final billing.

The Notes tab in Property Tax Billing is available for inputting any additional information on the property. Notes can be categorized and can include downloaded images of the property.
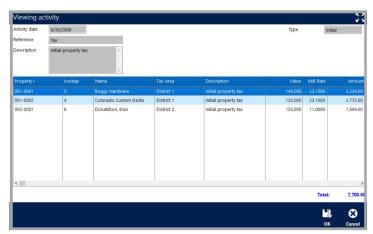

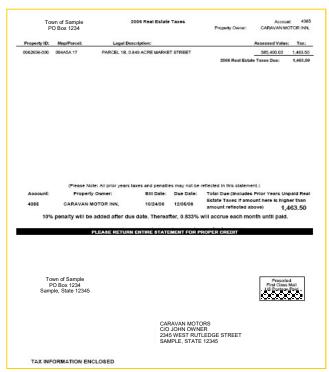*Set up detailed information for each property tax item.*

The AccuFund Property Tax Billing module has several features that offer tremendous value to tax clerks:

- By just clicking on a column header and entering Ctrl L, the user can search for specific information and bring up any activity detail.

- Preliminary reports can be run to review for any needed changes.

- Onscreen options are available that can be checked for specific circumstances, such as "Penalty Exempt" and "Bill Mortgagee."

- Receipts for tax payments applied to the tax record can be created in the AccuFund Accounting Suite Cash Receipts module.

- Manual adjustments can be made and automatically applied.

For each activity, the user can "Drill down to see the detail of all activity by property.

- Additional charges, such as late fees and interest, can also be applied and accrued.

- Supplementary tax services are included, such as generating vehicle decals/stickers.

Sample property tax bill, in this case a self-mailer.

COMPONENT INTEGRATION, AVAILABILITY & REPORTING

The Property Tax Billing module is integrated with:

- General Ledger for financial reporting
- Cash Receipts for cash history
- Fees, Taxes, & Licenses (FTL) for issuing decals

The Property Tax Billing module is available with both the Standard and Professional editions of the AccuFund Accounting Suite. It can also be purchased as a stand-alone product.

AccuFund provides a set of default reports with the Property Tax Billing module. These reports and forms may be modified or added to through the Reports/Forms Designer. The default reports include:

- Personal Property Statement
- Real Property Statement
- Property List
- Property Assessments
- Personal Property Fees