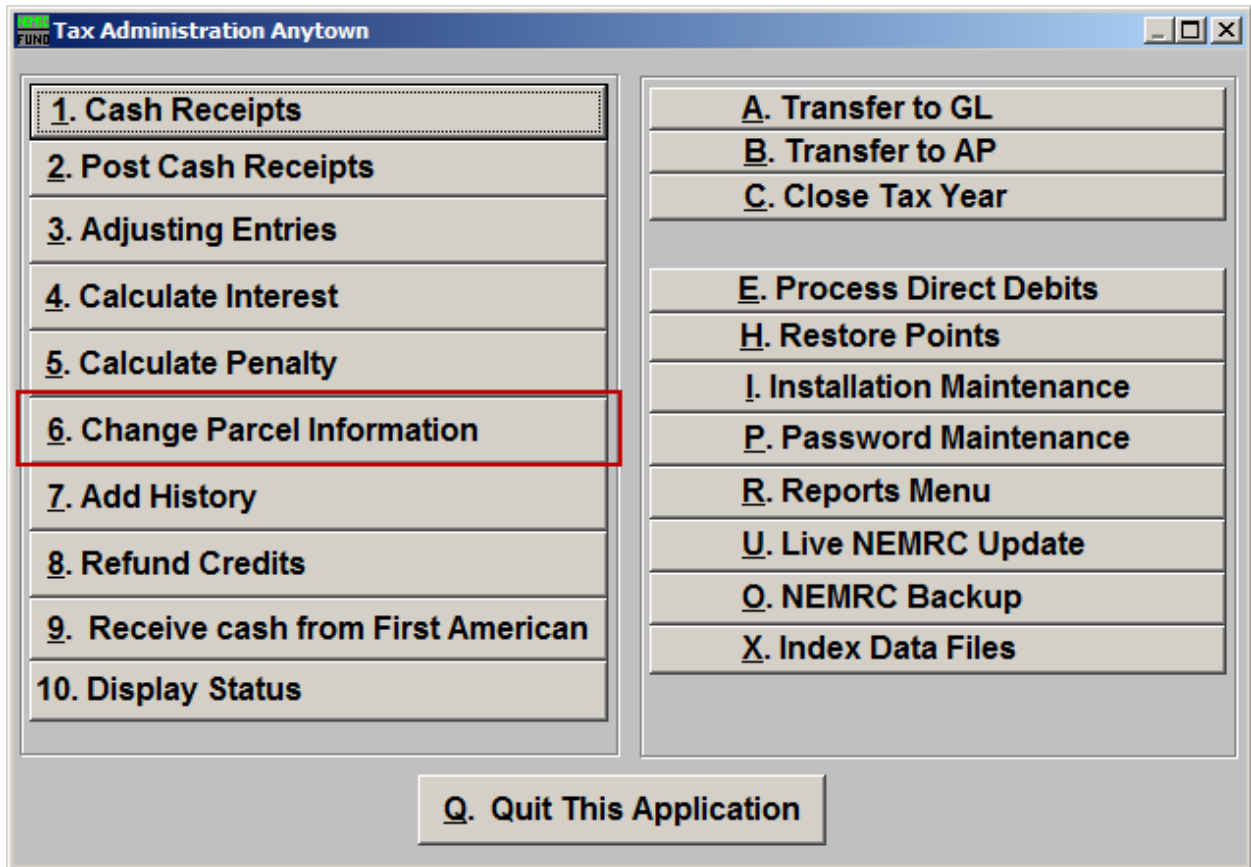


# Tax Administration

## 6. Change Parcel Information

### Table of Contents

Change Parcel Information .....	2
The “General” tab .....	3
The “Miscellaneous” tab .....	5
The “Notes” tab .....	6
The “Agreement” tab .....	7
The “Direct Debit” tab .....	8



Click on “6. Change Parcel Information” from the Main Menu and the following window will appear:

# Tax Administration

## Change Parcel Information

The screenshot shows a software window titled "Parcel Information" with a blue header bar. Below the header are five tabs: "General", "Miscellaneous", "Notes", "Agreement", and "Direct Debit". The "General" tab is active and highlighted with a red border. Inside the "General" tab, there is a red box around the top section containing the following elements: a red "1" icon, the text "Press F4 to Recall", a text field with "203020005-", a "Parcel ID" label, a text input field, a hyphen "-", another text input field, a "Find" button, a "Year" label, a text input field, and another "Find" button. Below this red box, there is a "Name" label and a text input field with a "Find" button. Further down are fields for "Name 1", "Name 2", "Address 1", "Address 2", "City St Zip", "Location A", "Location B", and "Location C". To the right of these fields are checkboxes for "Change names/addresses for all years", "Exempt from Interest", "Exempt from Penalty", "Open for Payment", and "Bankrupt". At the bottom of the "General" tab are fields for "911 Data", "Property Description", and "Taxmap". Below the "General" tab are fields for "Homestead" and "Housesite". At the very bottom of the window is a "Cancel" button.

1. Select the Parcel you are seeking. The “General” tab will appear. For additional information on finding Parcels, refer to TA GENERAL PARCEL LOOKUPS.

# Tax Administration

The “General” tab

The “General” tab will be the first tab that appears after you choose a Parcel.

Parcel Information

General Miscellaneous Notes Agreement Direct Debit

Press F4 to Recall 203020005-

Parcel ID 203020005 - Find Year 1998-1999 Find

Name Find

Change names/addresses for all years

Name 1 1

Name 2 2

Address 1 3

Address 2 4

City St Zip 5 6 7

Location A BUILDING AND LOT 8

Location B POND RD 9

Location C 10

Exempt from Interest 15  Open for Payment 17

Exempt from Penalty 16  Bankrupt 18

911 Data 19 0 19 19

Property Description 20

Taxmap 21

Homestead 11 1,336.00 12 133,600.00

Housesite 13

OK 22 Cancel 23

1. **Name 1:** Enter the first owners name in last name, first name order.
2. **Name 2:** Enter the second owners name in last name, first name order.
3. **Address 1:** Enter the first line of the mailing address for the owner.
4. **Address 2:** Enter the second line of the mailing address for the owner.
5. **City St Zip: City:** Enter the city of the mailing address for the owner.
6. **City St Zip: State:** Enter the state of the mailing address for the owner.
7. **City St Zip: Zip-Code:** Enter the zip code of the mailing address for the owner.
8. **Location A:** Enter the information that is usually place in this field by the listers office.
9. **Location B:** Enter the information that is usually place in this field by the listers office.

## Tax Administration

- 10. Location C:** Enter the information that is usually place in this field by the listers office.
- 11.** Enter the grand list value of property for the Tax Year being added.
- 12. Homestead:** Enter the homestead value for this property for the Tax Year.
- 13. Housesite:** Enter the housesite value for this property for the Tax Year.
- 14. Change names/addresses for all years:** Check this box to have all Tax Years with the same Parcel number get updated when saving information on this screen.
- 15. Exempt from Interest:** Check this box to exempt this Parcel from all interest calculations. This is often used when a Parcel goes into bankruptcy.
- 16. Exempt from Penalty:** Check this box to exempt this Parcel from all penalty calculations. This is often used when a Parcel goes into bankruptcy.
- 17. Open for Payment:** Check this box to allow payments to be posted to this Parcel and year. This is often unchecked when a Parcel goes into bankruptcy.
- 18. Bankrupt:** Check this box to indicate this Parcel and Tax Year are in bankruptcy. This option allows not producing delinquent notices for this Parcel that are not needed.
- 19. 911 Data:** Enter the 911 locatable address for this Parcel.
- 20. Property Description:** Enter the Parcel description as defined by the listers.
- 21. Taxmap:** Enter the tax map number for this Parcel if there is one defined.
- 22. OK:** Click this button when you have completed entry on all tabs.
- 23. Cancel:** Click on “Cancel” to return to the previous screen.

# Tax Administration

The “Miscellaneous” tab

Click on the “Miscellaneous” tab and the following window will appear:

The screenshot shows a software window titled "Parcel Information" with a blue header bar. The header bar contains the text "FUNO" and "Parcel Information" along with standard window control icons (minimize, maximize, close). Below the header bar are five tabs: "General", "Miscellaneous", "Notes", "Agreement", and "Direct Debit". The "Miscellaneous" tab is selected and highlighted with a dashed border. The main content area of the window is light gray and contains a red rectangular box labeled "1" which encloses five empty text input fields stacked vertically. At the bottom of the window are two buttons: "OK" labeled "2" and "Cancel" labeled "3".

1. These are user defined fields. Use “I. Installation Maintenance,” from the Main Menu, to define your use of these fields.
2. **OK:** Click this button when you have completed entry on all tabs.
3. **Cancel:** Click on “Cancel” to return to the previous screen.

# Tax Administration

The “Notes” tab

Click on the “Notes” tab and the following window will appear:

The screenshot shows a software window titled "Parcel Information" with a blue header bar. Below the header are five tabs: "General", "Miscellaneous", "Notes" (which is selected and has a dashed border), "Agreement", and "Direct Debit". The main area of the window is a large text field containing a red number "1". At the bottom of the text field is a checkbox labeled "2" followed by the text "Change notes/agreements for all years". Below the text field are two buttons: "OK" with a red number "3" and "Cancel" with a red number "4".

1. This field is user defined. Enter in the details of a payment agreement for this Parcel and Tax Year. This information will appear on the agreement report.
2. **Change notes/agreements for all years:** Check this box to have all Tax Years with the same Parcel number get updated when saving information on this screen.
3. **OK:** Check this box to have all Tax Years with the same Parcel number get updated when saving information on this screen.
4. **Cancel:** Click on “Cancel” to return to the previous screen.

# Tax Administration

## The “Agreement” tab

Click on the “Agreement” tab and the following window will appear:

The screenshot shows a software window titled "Parcel Information" with a blue header bar. Below the header are five tabs: "General", "Miscellaneous", "Notes", "Agreement", and "Direct Debit". The "Agreement" tab is selected and highlighted with a dotted border. The main content area is a large white rectangle with a red "1" in the top-left corner. At the bottom of the content area, there is a checkbox labeled "2" followed by the text "Change notes/agreements for all years". Below the content area are two buttons: "OK 3" and "Cancel 4".

1. This field is user defined.
2. **Change notes/agreements for all years:** Check this box to have all Tax Years with the same Parcel number get updated when saving information on this screen.
3. **OK:** Check this box to have all Tax Years with the same Parcel number get updated when saving information on this screen.
4. **Cancel:** Click on “Cancel” to return to the previous screen.

# Tax Administration

The “Direct Debit” tab

Click on the “Direct Debit” tab and the following window will appear:

The screenshot shows a software window titled "Parcel Information" with a blue header bar. Below the header are five tabs: "General", "Miscellaneous", "Notes", "Agreement", and "Direct Debit". The "Direct Debit" tab is selected and highlighted with a dashed border. The main area contains several input fields and labels:

- Direct Debit Last Name**: A text box containing the number "1". Below it is the instruction: "The direct debit last name on this direct debit screen MUST match the last name of the Tax Year".
- Banks Account Holders Name**: A text box containing the number "2". Below it is the instruction: "The name above is the name of the account holder. It will be transferred in the ACH file."
- ABA**: A text box containing the number "3".
- Account**: A text box containing the number "4".
- Account Type**: A label with the number "5" next to it. Below it are two radio buttons: "Checking" (which is selected) and "Savings".
- Phone**: A text box containing the number "6" preceded by two dashes "- -".

At the bottom of the window are two buttons: "OK" with the number "7" next to it, and "Cancel" with the number "8" next to it.

- 1. Direct Debit Last Name:** Direct Debit Last Name must be exactly the same as the Parcel identification name. This is stored for testing year to year in the event of change of ownership. The goal is to avoid an EFT from the old owner.
- 2. Banks Account Holders Name:** Bank Account Holder’s Name must be exactly the same as the account name in the bank records. EFT bank transactions are confirming the name on the account the funds are drawn from.
- 3. ABA:** This should be provided to you by taxpayer, via an enrollment form. Enrollment forms should be available from your bank. This number may be different than what appears on a check from the property owner and should be confirmed from the institution. Some institutions use a different ABA number for electronic banking.
- 4. Account:** This should be provided to you by taxpayer, via an enrollment form. Enrollment forms should be available from your bank.
- 5. Account Type:** This should be provided to you by taxpayer, via an enrollment form. Enrollment forms should be available from your bank.



## Tax Administration

6. **Phone:** Enter a contact phone number for the tax payer in the event the EFT process has a failure.
7. **OK:** Click on “OK” after all information is entered. You will return to the “General” tab, and the information will be saved. Click on “Cancel” to return to Main Menu.
8. **Cancel:** Click on “Cancel” to return to the previous screen.