How to create the Delinquent Taxpayer List and Notices

The Tax Collection system has the ability to create delinquent lists, notices, and set custom flags on accounts. This document will guide you through creating receivable groups, flags, setting flags within parameters, and printing delinquent lists and notices on specific receivables.

Creating Receivable Groups

1. Create a receivable group to signify which receivables to use in the delinquent report.

   Tools>Manage Groups

   ![Receivable Group Image]
2. Add a new receivable group by clicking on ‘Add New Group’ button. In this example the group name is TEST.

3. In this example, three receivables have been designated as TEST in the receivable group. Select ‘Done’ to close this screen.
Create a Flag

4. Tools > Manage Flags

These flags can be used to mark accounts for Bad Checks, Tax Sale, delinquent accounts, bankruptcy, etc.

- The ‘Reset to Default’ button at the top of the screen will clear a value for a flag, from all accounts in the system. Should you decide you no longer wish to mark the accounts in the system with a particular flag’s value, select the ‘Reset to Default’ button and this flag’s value will be restored to the default value on all accounts.
- To add a new flag, click on the ‘Add’ button. Enter the flag name, Data Type, and Default Value. Select Save.

- The new flag will be added to all accounts in the system marked with the default value. Click on ‘Close’ to exit the Flag Management screen.
Delinquent Lists

5. Reports>Built-in Reports>Delinquent Taxpayers

Double click on Delinquent Taxpayers. Select Print to open the wizard.
6. The Delinquent Taxpayer report wizard will open. Select Delinquent List from the drop down menu. Click ‘Next’.
7. Notice under Receivable Group, the drop down menu now has the word TEST as an option. Select TEST and this report will only include data from the three receivables marked with the word TEST in step 3.

- Enter the filter criteria.
- Select ‘Next’.

**Receivable Group:** Select a receivable group from the drop down menu. If you do not select a receivable group, the report will gather information from the entire database, not for a specific receivable or group.

**Filter:** This menu offers four ways to filter the list; RP in account, MV in account, Tang in account, or User item in account. If you do not select a filter condition, the report will include all account information within the specified receivable.
Accounts with Flags: To exclude accounts that are marked with certain flags, click on the ‘Accounts with Flags’ button. Select the flag that you would like to exclude, select ‘is no’ on the Operator dropdown menu. Click on the ‘Add Filter’ button and save this filter.

In this example, any account with the flag – COLLECTION AGEN that is marked with ‘YES’ will not be included in this report. The criteria that has been set indicates only flags marked as ‘No’ will be included. This will exclude all accounts that have been sent to the Collection Agency.

![Set Flag Filters](image)

Starting and Ending accounts: The start and end account automatically appears in these fields when the report is opened. You have the option to enter an account range.

Current Tax Year: This field should default to the current tax year, but you can change the tax year if necessary.

Compute Interest as of: Enter the interest computation date.

Test Minimum due criteria on the: Selecting the Account Level will calculate which accounts are delinquent with the minimum due on the overall taxpayer’s account. The Receivable Level option will test the minimum due on each individual receivable within the taxpayer’s account.

Minimum Principle due to be considered delinquent: You can exclude accounts with small balances by using this filter option.

Minimum Interest due to be considered delinquent: You can exclude accounts with a minimum amount of interest by using this filter option.
Include accounts with scheduled ACH: If your system electronically receives payments from taxpayers through the Automated Clearing House, leave this option unchecked to exclude ACH accounts.

Include Tax Item balances: This option, if selected, will break down the balance on each tax item.

Print per Diem Statement: Selecting this option will include the per diem on the delinquent listing or notice.

Collect to Pay in full: Select this option to report the full amount due on the account.

Collect to make current: Select this option to report the amount that will bring the account current.

8. To set a flag on the accounts that meet your criteria, check ‘Set this flag for all accounts that appear on the report’. Select a flag from the drop down menu. Click on the ‘Next’ button.
9. Print or Preview your report. Select ‘Finish’ to close the wizard.
Delinquent Notices

10. Reports>Built-in Reports>Delinquent Taxpayers

Double click on Delinquent Taxpayers. Select Print to open the wizard.

11. The Delinquent Taxpayer report wizard will open. Select Delinquent Notice from the drop down menu. Click ‘Next’.
12. Notice under Receivable Group, the drop down menu now has the word TEST as an option. Select TEST and this report will only include data from the three receivables marked with the word TEST in step 3.

- Enter the filter criteria. (For field descriptions, refer to # 7)
- Select ‘Next’.

13. Select the Notice settings.
Notice Text: You must select the text that will print on the notice.

Notice Due Date: This is the due date that will appear on the notice.

Include Barcode: If you check this option, a barcode will print at the top of the notice. Using a scanner, the barcode allows you to scan the account numbers into the Tax Collection system.

14. To set a flag on the accounts that meet your criteria, check ‘Set this flag for all accounts that appear on the report’. Select a flag from the drop down menu. Click on the ‘Next’ button.
15. Print or Preview your Notices. Select ‘Finish’ to close the wizard.