

Class: Preparing for Tax Billing

Duration: 1 Day Session

Overview: This class will teach students how to prepare for sending out tax bills. Each student will learn what needs to be completed before bills are printed. This will include entering tax rates, balancing special assessments running a tax roll and learning to export tax bill print files. At the end of this class students will be confident in all functions of tax bill preparations.

Who Should Attend:

All BSA-Tax users that are responsible to tax bill preparations

Outline:

Lesson 1: General Taxes Setup.

- Entering Unit Address
- Calc Options
- Equalization Factors
- Entry of Tax Bill Message
- Fiscal Years
- Postal Permit Entry

Lesson 2: Tax Rate Entry

- Tax Names and Millage Rates
- Tax Names/Millage Report
- Tax Rate Tools

Lesson 3: Special Assessments

- Single Year Special Assessments
- Specials Assessments x rates
- Balancing Special Assessments
- Reporting for Special Assessments

Lesson 4: Balancing Tax Roll

- Balancing Advlorm
- Balancing Special Acts

Lesson 5: Exporting Tax Bill Data

- Exporting data to print vendor

Pre-requisite(s) – Introduction to BSA-Tax.