

Searching Taxpayers and Property

The *Taxpayer Search* and *Property Search* screens are designed to make it quick and easy to do the searches you do most often. When combined with the record filter, they also offer a great amount of power and flexibility. The search results lists are used as the starting point for many features in the program from batch printing statements to the taxpayer and property list report options. Mastering these screens will allow you to get the most out of the system. This TSB will look at several typical search examples and show you how to use them.

Taxpayer Searches

The *Taxpayer Search* screen appears to have the basic options for searching, but clicking on the Record Filter shows you a wide range of fields that can be searched by.

The first thing you will notice is that most of the fields in the list relate to property, not taxpayers. These fields allow you to do a secondary search on property characteristics and select taxpayers who have property meeting that criteria. Examples of this type of search would be to batch print statements for all taxpayers with certified land, select all taxpayers about to be converted to delinquent to send them notices, or all taxpayers with property in a particular geographic area (school district, section-township-range, or subdivision) for legal notifications. The most important thing to remember about these types of searches is that ultimately you are selecting taxpayers and not property. What these searches do is identify taxpayers who have at least one property that meets the criteria—even if they have other properties that don't. If they do, that taxpayer is selected. However, if you then print statements for each taxpayer, it will be a complete statement and not just the parcels that met your original filter. If you want to only work with those parcels, you must start at the property search screen.

Keep in mind that the fields *Balance*, *TaxOwed* and *TaxPaid* come from the parcel details and are specific to each individual parcel and not for the overall taxpayer. See the following section for a detailed discussion of the property-related fields.

The Taxpayer Type field (listed as *TPTYPE* in the record filter screen) is another field that is useful when searching. This can be used to filter out (or isolate) exception taxpayers like mortgage companies and utilities.

GeneralComment and *PaymentComment* refer to the comment fields available in the Taxpayer Edit screen. These are best used with the Contains or Does Not Contain filter options.

The Taxpayer Search results can be used to batch print statements and delinquent notices, as well as run the reports listed under Taxpayer Lists.

Property Searches

The most important field to understand on the *Property Search* screen is the checkbox that says Search History. By default this box is unchecked, meaning that your search will only effect “active property”, which is all parcels for the current tax year, plus all delinquencies that are still outstanding. As soon as a delinquent parcel is paid, it immediately disappears from the active property list. This default represents the typical way you will be searching when taxpayers approach your window for payment.

Checking the Search History box will give you access to all records, including paid delinquents as well as current records from prior years. This is important when running the *Property List* reports, because they always assume search history is on. If you do not check the box when searching, and then run a *Property List* report, you may get more results than you intended, so it is recommended to always use Search History when running the Property List reports. Since checking search history opens the search to all years, it is very common to use the *Tax Year*, *Property Type*, and/or *Tax Book* fields on the search screen to narrow your criteria down to the correct set of parcels.

The Record Filter option gives you access to a great number of additional fields beyond the basic search screen. Remember that the record filter works together with the search fields on the main screen, so you can filter as much as you want with the easier search fields, and then use the record filter to further refine your results. Some of the fields are self-explanatory, but listed below is a description of the fields that could use a bit of explanation.

AssessedValue and OrgChgValue—These fields both represent an ad valorem assessed value. The field *AssessedValue* is the value at this moment in the system. The *OrgChgValue* represents the value as it was rolled over from the Assessor. Parcels that were added to the book with a corrections will have a 0 for *OrgChgValue*. These fields are useful during Final Settlement. Examples would be a filter that says *OrgChgValue = 0 and AssessedValue > 0* would show you all the parcels added to the book. This could be reversed for parcels taken off the book. These fields work slightly different for delinquent parcels; in this case the *OrgChgValue* field contains the value that first went delinquent, prior to any further adjustments to value. For parcels that had partial payments and then went delinquent, this will be a pro-rated value based on the balance due at the time it went delinquent.

Balance, TaxOwed, TaxPaid—These fields summarize the tax and payment activity on the parcel. *TaxOwed* represents the tax obligation based on the assessed value and other taxes tied to that parcel. Remember that *TaxOwed* does not reflect payments, but obligation. *TaxPaid* reflects the total amount of payments made against this parcel. Since these reduce the total obligation, *TaxPaid* is usually a negative number. *Balance* is the amount still owed and is computed from the other two fields.

Examples of filters using these fields:

- *Balance > 0*—unpaid parcels. This might be used before converting to delinquent.
- *Balance < 0*—overpaid parcels that have not been refunded.
- *TaxPaid <> 0 and Balance <> 0*—Parcels with a partial payment that have not been completely paid.

DelqYear—This field represents the year of the oldest delinquency associated with this parcel, and is the same regardless of which individual year you are looking at. For example, a parcel with current year taxes for 2008 and prior delinquencies still owed for 2007, 2006, and 2005 will have 4 records in the system, each with the appropriate tax year. But the *DelqYear* field will be 2005 on all 4 records, since that parcels has taxes due back to 2005. If just the 2005 year were to be paid or adjusted off, this field would then change to 2006 for all remaining records. This field is often used to distinguish between first year delinquents and prior year delinquents. It can also be used to select current parcels with no delinquencies by searching for current and then adding *DelqYear is blank*.

DelqBookClose—This field is used on current year parcels and represents the value of the *DelqYear* field at the moment the parcel was converted to delinquent. This enables the system to always know whether it was a first year or prior year delinquent with regards to the books, even after further payment activity has happened. The *DelqYear* field above is dynamic and changes whenever a payment is paid. The *DelqBookClose* field never changes and retains that information as a permanent record.

PropKey—This field is used internally and offers no benefit for filtering.

Taxpayer Fields—Several fields (*TPName*, *TPAddress*, *TPTYPE*, *GeneralComment*, and *PaymentComment*) come from the Taxpayer file, and can be used to further filter property based on the condition of the taxpayer the property is currently assigned to.

The *Property Search* results can be used to run any of the reports listed under *Property Lists*.