

## Working With Taxpayers

Taxpayers are the beginning of the process in WinCollect. Every other record in the system eventually leads back to a taxpayer. The taxpayer list should contain one (and only one) record for each different individual, business, or entity that owes taxes in the county. Each Taxpayer can have one or more parcels assigned. Each parcel then has one or more tax issues, and each tax has transactions. But it all starts with the taxpayer.

The taxpayer record represents the individual or entity paying the taxes. Therefore, a taxpayer can not be considered to be exempt or be in a particular school district, because these are property issues, not taxpayer issues. The taxpayer record itself holds a minimal amount of information relating to name and address and general information.

The taxpayer file is the only file in the Collector's system that can be shared with the Assessor because the taxpayer file itself has no information about years, values, parcels, legals, or owner names. The Assessor and Collector can each tie their own private records to the common list of taxpayers, but even the assignment of parcels is not shared. The taxpayer file is strictly a shared address list that both offices can refer to.

To edit a taxpayer's information, simply select the taxpayer and click the Edit button on the toolbar. The edit window contains standard information like name, address, and phone numbers. An email address field is available for those taxpayers that may want to receive tax statements by email. Note that the TPID field is not available for editing and can not be changed once created.

The Taxpayer Type allows you to categorize your taxpayers into different groups that may need to be handled differently. Typically all the types are special exceptions, and then everybody else falls in to the "Standard" category, which is the default. Examples include mortgage companies and utility companies, that are processed by different rules. Often times counties will only print statements in batch for standard taxpayers, as the other types are handled manually, and this field provides an easy way to filter out the exception. Non-standard taxpayers also cause the payment screen to prompt for number of receipt copies.

There are two comment fields available for each taxpayer: the general comment and the payment comment. The general comment is for your own use and has no predetermined behavior except to give you a place to store information. This is not printed on their statements or receipts. The payment comment is a special place to put important notes that need to be recalled when receiving money from this taxpayer. This comment will pop-up in a message box every time you go to the payment screen. This is a great place to warn about previous bounced checks and other unusual situations that the operator may need to be informed of.

If property needs to be changed from one name to another, it is important to reassign the property to a new taxpayer, and not just edit the current taxpayer and change the information. Remember that multiple parcels in both the Collector's and Assessor's records may be pointing to this one taxpayer, so changing the information will change the billing address for every parcel assigned to it.

To create a new taxpayer from WinCollect, go to the Taxpayer tab and then click the Create button on the toolbar. The same edit window will appear for you to fill in the information. Note that the TPID field will be blank until you click Save, at which time a new TPID number is generated.

In counties using a shared taxpayer file, the Assessor also has the ability to create and edit taxpayer records. This allows address changes to be given to either office and automatically update the other as well.

Of special note is that there is not a way to delete taxpayers in WinCollect (or the Assessor's office) because of the potential for damage caused by deleting a record used by the other offices. Deleting taxpayers can be performed using the separate Taxpayer Maintenance program, which allows you to see assignments in effect from all offices in the courthouse.