

iTax Update Highlights

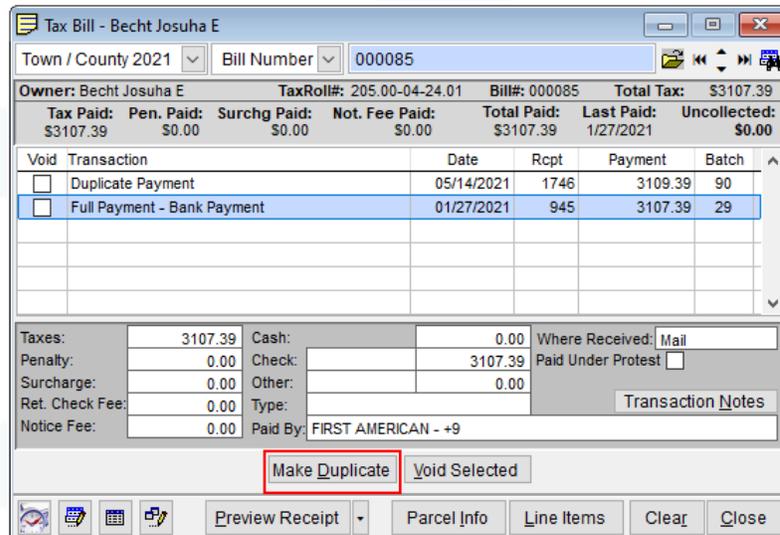
. Please thoroughly review all the update highlights to fully understand the changes that have been made.

Transfer Duplicate Payment Feature

A new feature has been added which allows for the transfer of a duplicate to another payment on the same bill. This is helpful when the collector wishes to refund the payer that paid first, to do so you must transfer the duplicate to the first payer so that a refund may be issued.

Transferring a Duplicate on a Full Payment

Select the non-duplicate payment by clicking on the payment from the **Transactions Tab** on the **Individual Payment** screen and then select the **Make Duplicate** button.



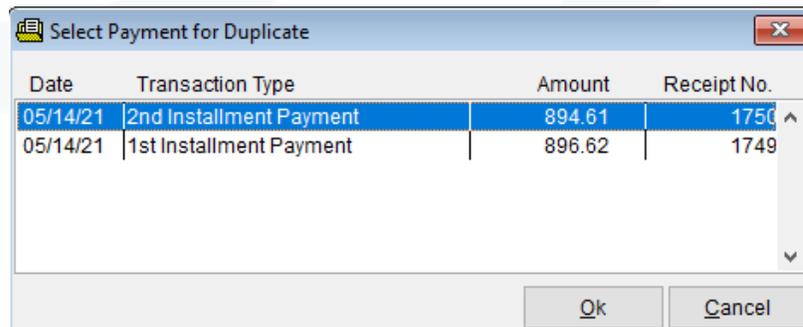
Void	Transaction	Date	Rcpt	Payment	Batch
<input type="checkbox"/>	Duplicate Payment	05/14/2021	1746	3109.39	90
<input checked="" type="checkbox"/>	Full Payment - Bank Payment	01/27/2021	945	3107.39	29

Taxes: 3107.39 Cash: 0.00 Where Received: Mail
 Penalty: 0.00 Check: 3107.39 Paid Under Protest
 Surcharge: 0.00 Other: 0.00
 Ret. Check Fee: 0.00 Type:
 Notice Fee: 0.00 Paid By: FIRST AMERICAN - +9

Buttons: **Make Duplicate** (highlighted), Void Selected, Preview Receipt, Parcel Info, Line Items, Clear, Close

Transferring a Duplicate on an Installment Payment

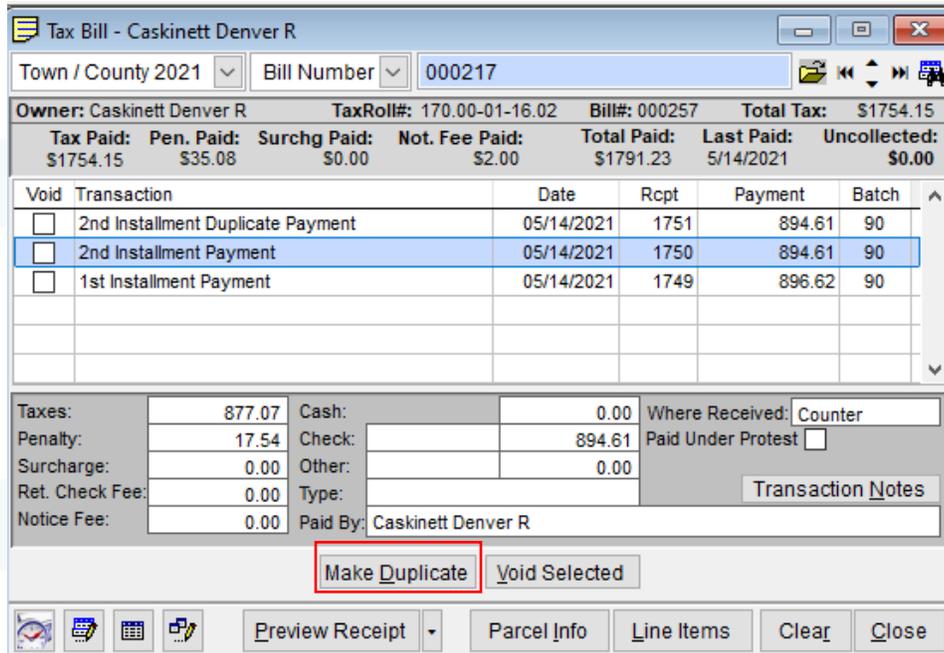
When a duplicate payment is posted on a bill that has installment payments, the system will prompt the user to determine which installment the duplicate is applied to.



Date	Transaction Type	Amount	Receipt No.
05/14/21	2nd Installment Payment	894.61	1750
05/14/21	1st Installment Payment	896.62	1749

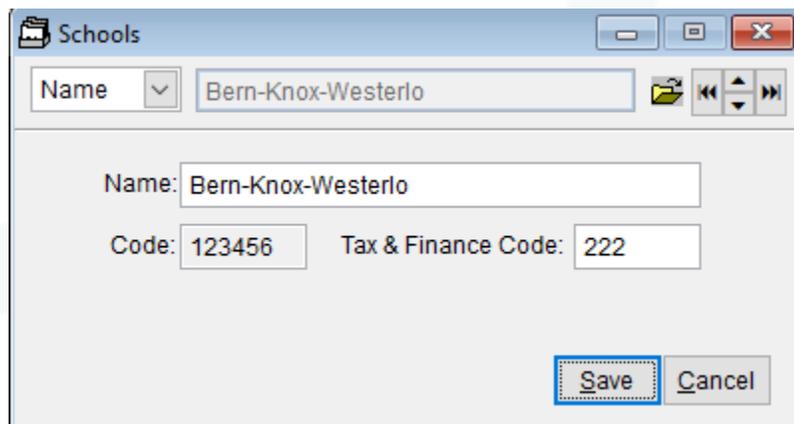
Buttons: Ok, Cancel

After the duplicate is posted, select the non-duplicate payment for the installment you wish to transfer the payment from on the **Transactions Tab** within the **Individual Payment** screen and then select the **Make Duplicate** button.



Update School Name

- If the description of the school district that prints on the iTax bill is not correct you can now update the school's name. Go to Utilities > School Lookup and use the search to locate the desired school, once a change to the name is made and a Tax & Finance code is added the record can be updated.



Other Changes

- Fixed an issue related to partial direct payments displaying improperly on the tax online website and allowing full payments to be made with a partial balance remaining.
- Updated the tax online site to display the proper MUNI name. This mainly effects the school collection in which there can be different towns (SWIS codes) within the district.

The proper town name will now display in the MUNI field online based on the value of the SWIS code.

- Removed the label “Total Taxes Due By” from the bottom of the levy line section of the bill and receipt. This only showed the amount due for the penalty free period and led to confusion. The proper amount to pay based on the date can be determined from the Payment Period section.
- Updated the Rockland Village export to allow for different percentages of penalty based on requirements from the Village of Montebello.
- Addition of an excel file to the Rockland School Unpaid export.
- The remote assistance link has been updated to <https://support.edmundsgovtech.com>