Excise

Taxpayer Guide

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Table of Contents

INTRODUCTION

Excise provides the Taxpayer the ability to view and manage accounts, as well as, complete and remit coupons and payments online. The following instructions will walk you through using the Excise system to access your Tourist Development Tax account online.

This guide is designed to provide an overview of the basic taxpayer processes within Excise. Pioneer Technology Group reserves the right to update, change, delete or append to this guide at any time.

Please note that some screens and/or text may appear differently.

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Contact Information

If you require further assistance, please contact us.

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GETTING STARTED

This section will take you through the steps of logging into the Excise System as well as give you a quick overview of the Home screen Navigation.

Logging into the Excise System

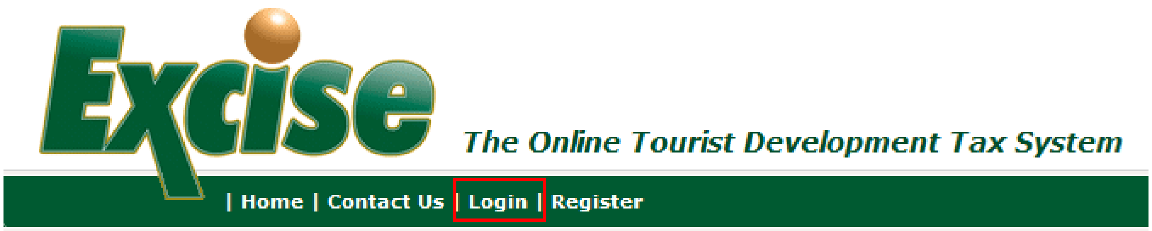
Follow the steps below to access your account(s) in the Excise system.

1. Access the county Excise site via the following address :

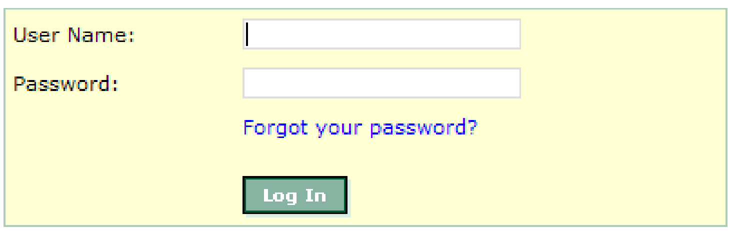
   www.touristtax.com

Note: *Click on the link for the designated county's website.*

2. From the top menu bar, click **Login**.

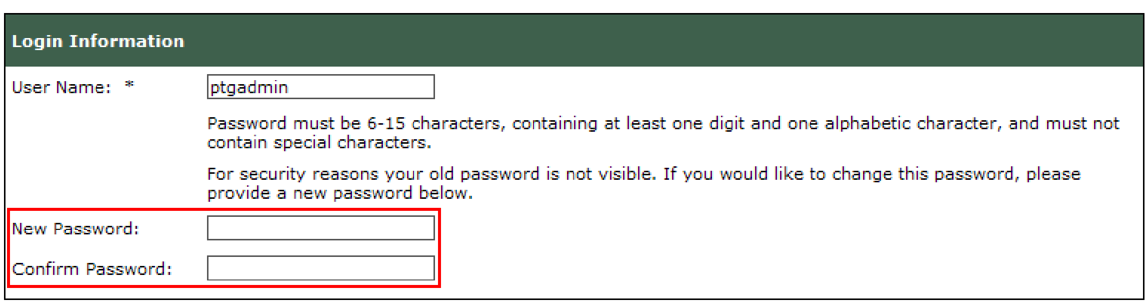


3. At the login screen, enter the user name and password.



Note: *The user will be provided with a User Name and initial password from the taxing authority. Please contact them directly with questions regarding log in information.*

4. Click **Log In**.
5. Is this the first time logging into the Excise System?

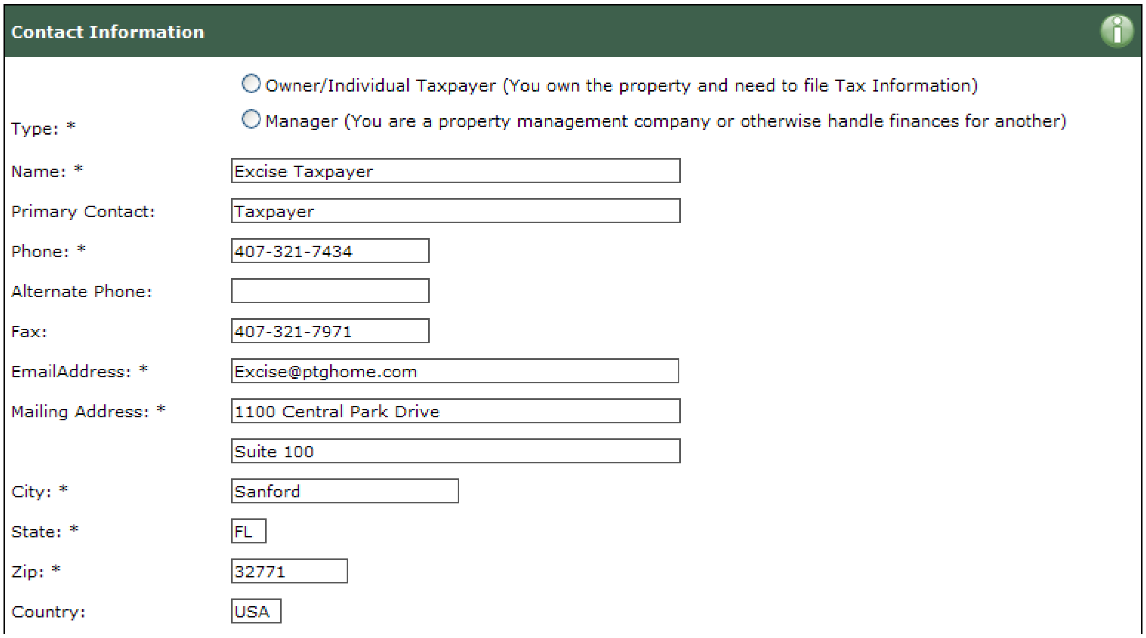


   If NO: Proceed to Step 10.

   If YES: The user will be asked to select a new password.

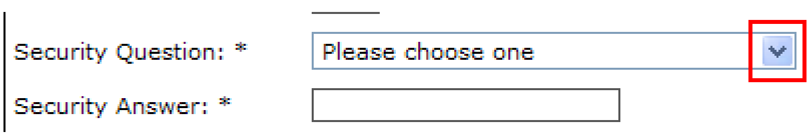
   Note: *Please pay special attention to the password requirements.*

6. Enter and or Update profile information.

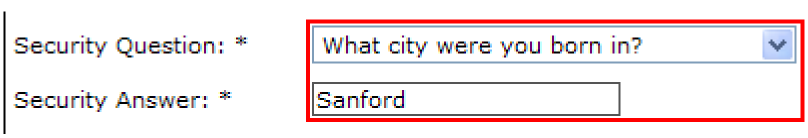


Note: ** - Denotes a required field. You will not be able to proceed until these items are complete.*

7. Choose a security question from the drop down list. (This will allow a user to access their account should they forget their password.)



8. Enter Security Answer.



9. Click **Save Changes**.

Result: User will receive an email informing them that their profile has been updated.

10. User will then be directed to the Excise Taxpayer Account Home Screen.

Logging out of the Excise System

Follow the steps below to log out of the Excise system.

1. From the top menu bar, click **Logout**.

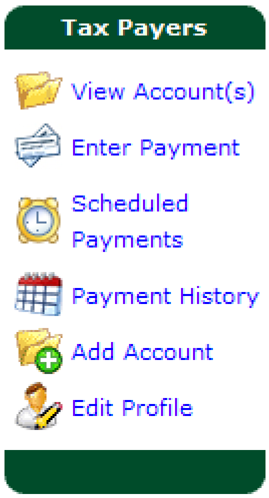
Result: User will be logged out of the Excise System and return to the Home screen.

Navigating through the Taxpayer Home Screen

The following is a screen shot of the Excise Taxpayer Home Screen. Explanations on specific items are described on the next few pages.

Menu Items

The Menu on the left of the screen allows you to perform the following functions:



- **View Account(s)** will bring a user back to the Home Page.
- **Enter Payment** will allow a user to go straight to the payment screen to pay any outstanding taxes on submitted returns.
- **Scheduled Payments** will allow a user to view any scheduled (pending) payments on their account.
- **Payment History** will allow a user to view prior payments made within the Excise System.
- **Add Account** will allow a user to add a new account. (Note: this option may not be available in all taxing districts.)
- **Edit Profile** allows a user to make changes to their contact and login information including changing their passwords.

Account Information at a Glance

The View Account Screen gives a brief overview of basic Account information.

1. From this screen, a user can view the Account Name, Account Number, Tax Type, the Status of the account, as well as any outstanding balances due and/or credits available.
2. The user can also view any outstanding returns due, as well as the next future return due.

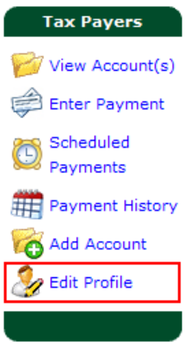
VIEWING AND UPDATING ACCOUNT INFORMATION

Taxpayers have the ability to view account information. The taxing authority will determine if taxpayers will be able to edit their account information or have read only access to the information. If they have read only access, they will need to contact the taxing authority to make changes to their account. Follow the instructions on the next few pages to view/edit account information.

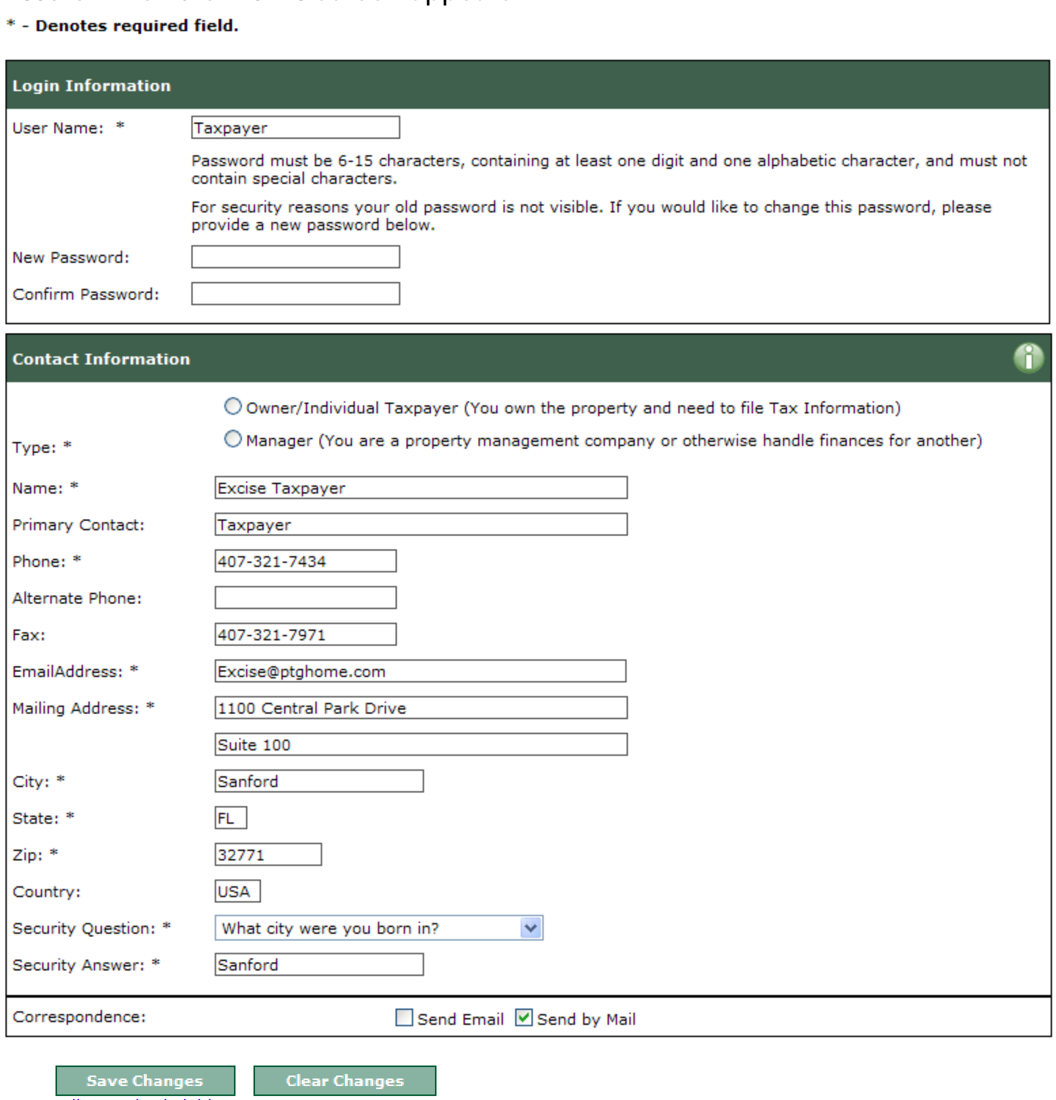
Viewing/Editing User Profile and Login Information

Follow the instructions below to view and edit user profile information.

1. Select **Edit Profile** from the Menu.



Result: The **Edit Profile** screen appears.



*** - Denotes required field.**

Login Information

User Name: * Taxpayer

Password must be 6-15 characters, containing at least one digit and one alphabetic character, and must not contain special characters.

For security reasons your old password is not visible. If you would like to change this password, please provide a new password below.

New Password:

Confirm Password:

Contact Information

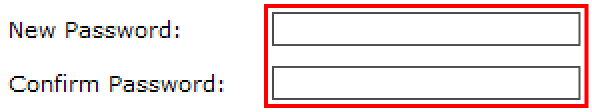
Type: *
- Owner/Individual Taxpayer (You own the property and need to file Tax Information)
- Manager (You are a property management company or otherwise handle finances for another)

Name: *	Excise Taxpayer
Primary Contact:	Taxpayer
Phone: *	407-321-7434
Alternate Phone:	
Fax:	407-321-7971
EmailAddress: *	Excise@ptghome.com
Mailing Address: *	1100 Central Park Drive
	Suite 100
City: *	Sanford
State: *	FL
Zip: *	32771
Country:	USA
Security Question: *	What city were you born in?
Security Answer: *	Sanford

Correspondence: Send Email Send by Mail

Save Changes Clear Changes

2. To change your password, enter in a new password and re-enter the same password into the Confirm Password field.



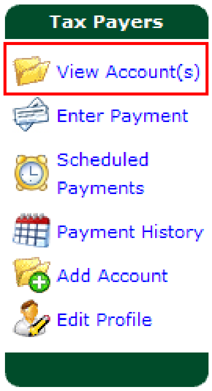
3. Continue making any necessary changes to the profile and click **Save Changes.**

Result: The following message will display at the top of the screen confirming changes:

Viewing/Editing Account Information

Taxpayers have the ability to view account information. If the Taxing Authority permits, they will also have the ability to update their account and property information. Follow the instructions below to view/edit account information.

4. Select **View Accounts** from the Menu.

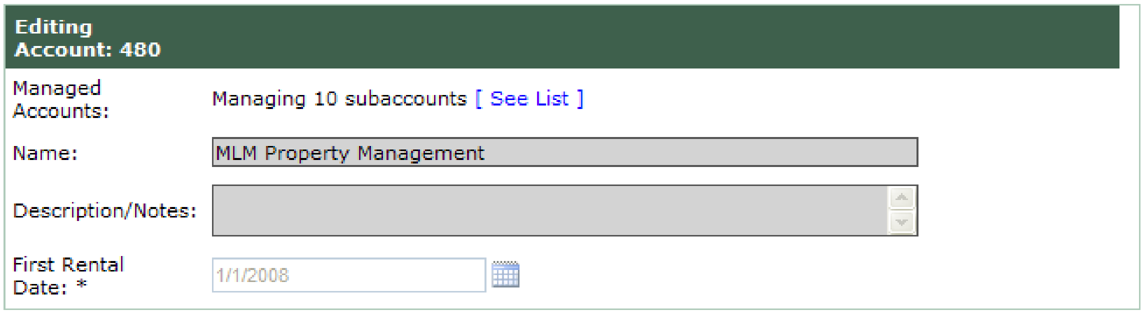


Result: The **View Account** screen appears.

2. Click on the file folder next to the Account you would like to view/edit.

General Account information

From the **Edit Account Screen**, a taxpayer can view/edit their account information.



1. **Managed Accounts:** Will display detail for number of accounts being managed. (If applicable.)

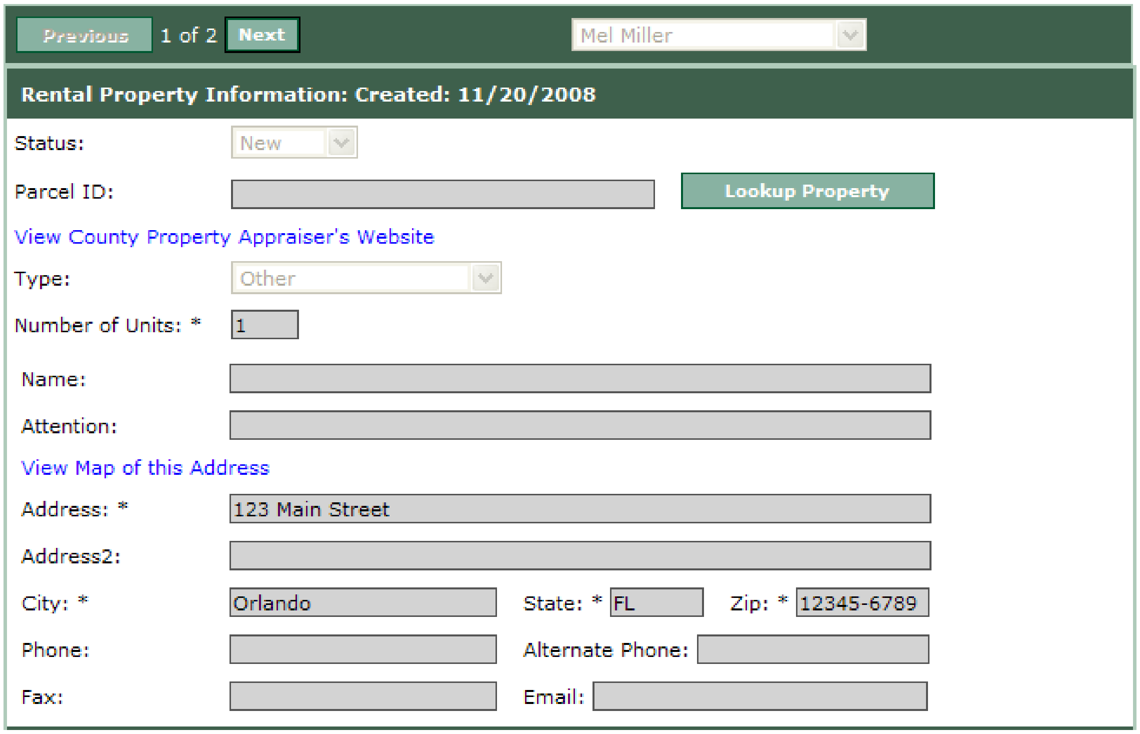
2. **Account Name:** Name of Account. *(i.e. Beachside Motel or XYZ Property Management.)*

3. **Description/Notes:** Any notes or additional information about the account.

4. **First Rental Date:** Indicates first date that tourist taxes were collected for the account.

Rental Property Information

The middle section allows you to view/edit individual property information.



1. **Status:** Status of rental property. *(i.e. New, Active or Inactive)*

2. **Parcel ID:** The rental property's parcel ID number at the Property Appraiser's Office.

Note: *For assistance in finding a Parcel ID (Property Appraiser folio number) click on the* ***County Property Appraiser's Website*** *link. User will be directed to the Taxing Authorities PAO search site.*

3. **Type:** Refers to the type of rental property.

Note*: The list of available property types may vary by Taxing Authority.*

4. **Number of Units:** Refers to the numeric number of units for the property.

5. **Name:** Name of Rental Property. *(i.e. Oceanside Condo-Unit 123)*

6. **Attention:** Property manager's name or the main point of contact.

Note: *You can view a Google® Map of this property if the address is complete by clicking on the* ***View Map of this Address*** *link.*

5. **Address:** Property street address.

6. **Address 2:** Additional property address info – Suite #, Unit #, building name, etc.

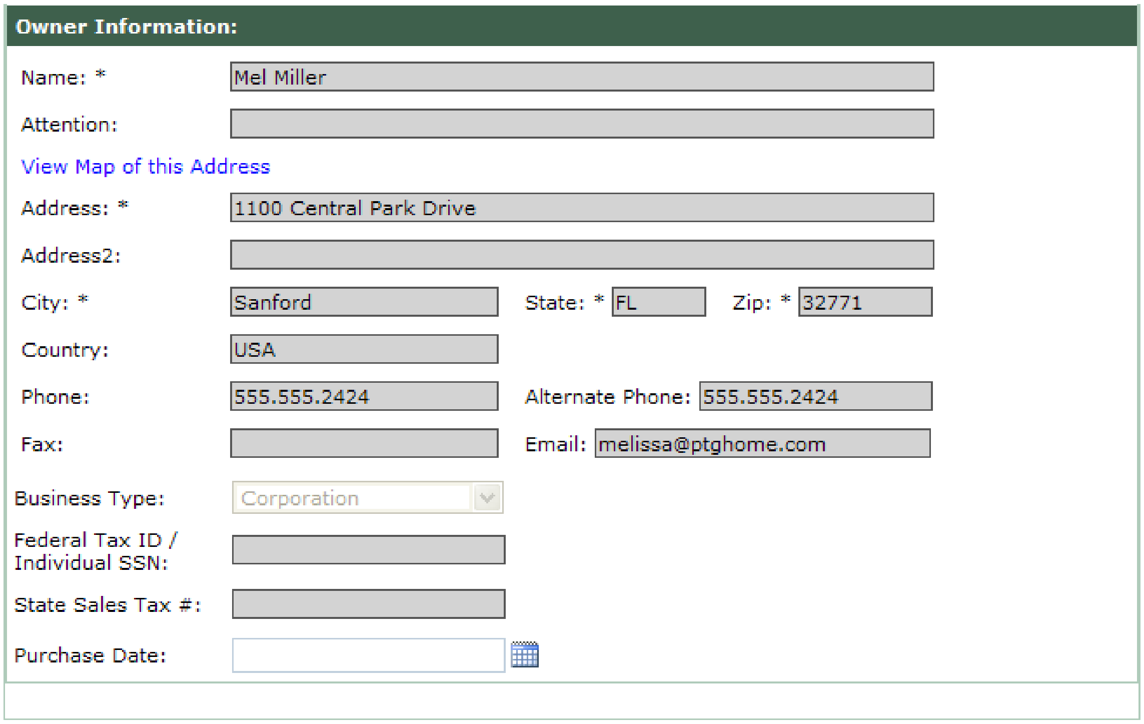
7. **City:** City where property is located.

8. **State:** State where property is located.

9. **Zip:** Zip code where property is located.
10. **Phone/Alternate Phone:** Property's phone number and alternate phone number, such as a cell phone number.
11. **Fax:** Property's fax number.
12. **Email:** Property's email address.

Owner Information

The bottom section allows a user to view/edit property owner information.


Owner Information:

Name: * Mel Miller

Attention:

View Map of this Address

Address: * 1100 Central Park Drive

Address2:

City: * Sanford State: * FL Zip: * 32771

Country: USA

Phone: 555.555.2424 Alternate Phone: 555.555.2424

Fax: Email: melissa@ptghome.com

Business Type: Corporation

Federal Tax ID / Individual SSN:

State Sales Tax #:

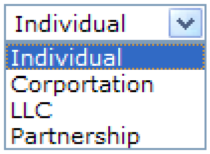
Purchase Date:

1. **Owner Name:** Property owner's name.
2. **Owner Attention:** Property owner's attention or alternate point of contact.

Note: *You can view a Google® Map of this property if the address is complete by clicking on the* ***View Map of this Address*** *link.*

3. **Address:** Property owner's address.
4. **Address 2:** Property owner's address info – Suite #, Unit #, building name, etc.
5. **City:** City where property is located.
6. **State:** Property owner's state.
7. **Zip:** Property owner's zip code.
8. **Phone/Alternate Phone:** Property owner's phone number and alternate phone number, such as a cell phone number.
9. **Fax:** Property owner's fax number.
10. **Email:** Property owner's email address.

11. **Business Type** refers to the owner type.



Note: The list of available business types may vary by Taxing Authority

12. **Federal Tax ID** or **Social Security Number** information for the property owner.

Note: *Federal Tax ID and Social Security Numbers are stored on a secured server (https), and are encrypted upon being entered into Excise.*

13. **Sales Tax Number:** State Sales Tax Number that is registered to the property.

Note: *Sales Tax Numbers are provided by the state Department of Revenue. If you have not yet registered with the Department of Revenue, you need to do so. In the case of a pending tax number please enter "pending" in this field.*

14. **Purchase Date:** The date that the rental property was purchased.

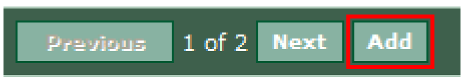
Adding an Additional Rental Property

A Taxing Authority can grant taxpayers the ability to add additional rental properties to their existing account. Please contact your taxing authority directly if you have questions regarding rights on adding new rental properties.

Note: *Taxpayers should use this feature only if they are still planning on submitting one return for multiple properties. These properties must also be within the same taxing district. If a user is planning to submit a separate return for the new property, please use the* ***Add Account*** *feature from the Taxpayer Menu. Please contact the taxing authority with further questions.*

Follow the steps below to add an additional rental property.

1. Click the **Add** button located above the rental property information section.



2. Complete the **Rental Property Information** and **Owner Information** sections.
3. Add additional properties as needed.
4. Click **Save Changes.**

Result: Changes to the account and property information will be saved and user will be returned to their home screen.

Deleting or Inactivating a Rental Property

User must contact their Taxing Authority directly to delete or inactivate a property on an account.

Adding A New Account

Taxpayers have the ability to add a new account to their login profile. By adding a new account they also become responsible for remitting a return and tax payment to the Taxing Authority each month. Once a new account is created, the Taxing Authority staff will review the information and contact them when the account becomes activated.

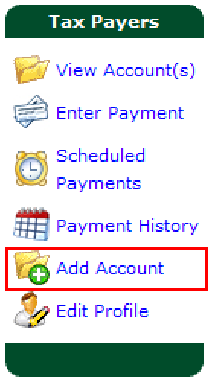
Note: *This option may not be available in all taxing districts. Taxpayers may be required to contact the Taxing Authority directly to create a new account.*

Note: *Please be aware that by creating a new account, taxpayers will be required to submit a return for each account on a monthly basis. Failure to file these returns can result in penalties and interest accruing on the delinquent returns.*

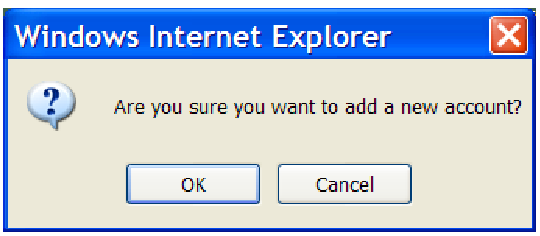
Adding an Account

Follow the instructions below to add a new account to a user profile.

1. Select **Add Account** from the Menu.

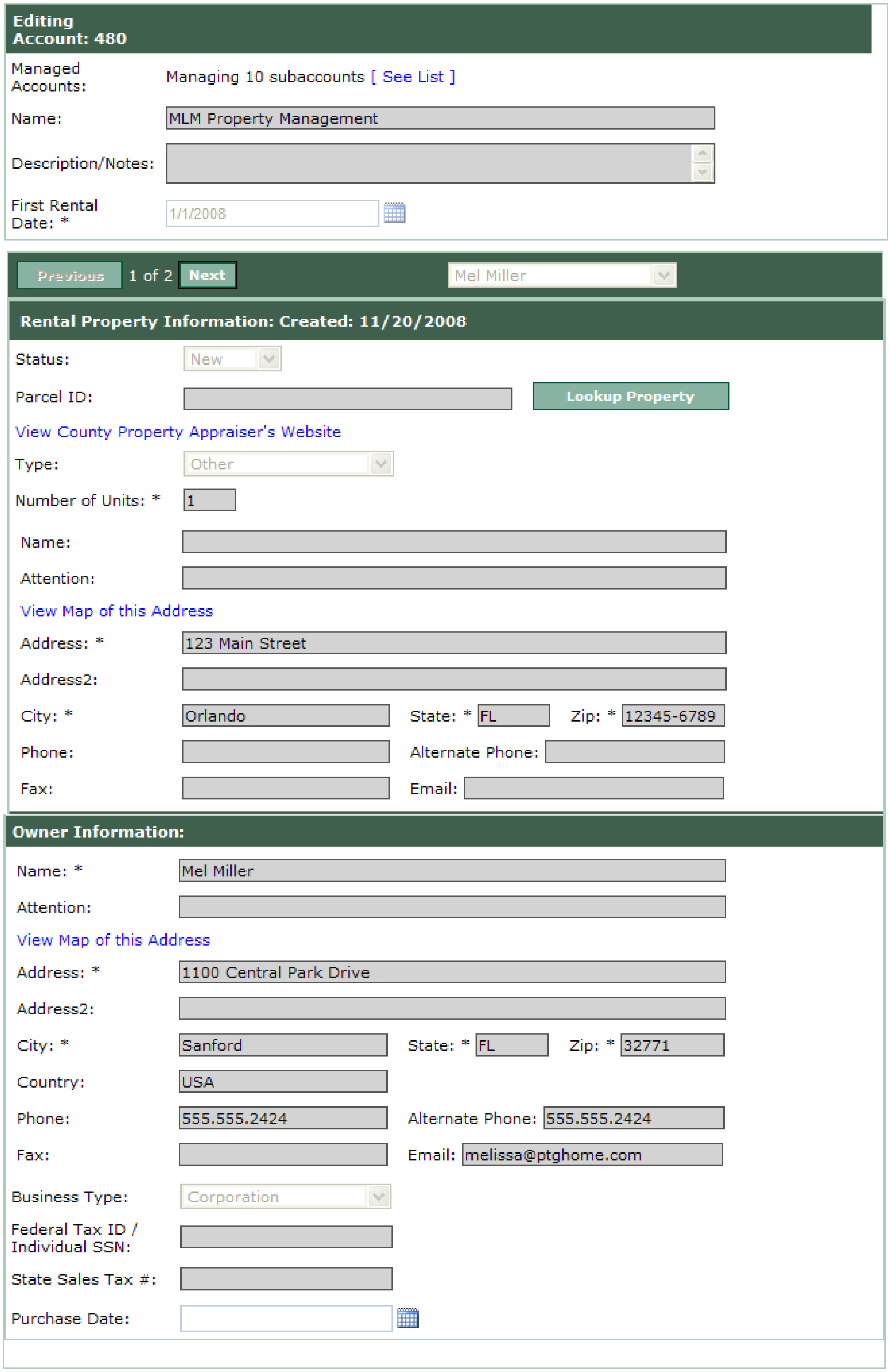


Result: The "**Are you sure you want to add a new account?"** warning appears.



2. Click **OK** to proceed with adding a new account.

Result: The **Edit Account** screen appears.



Main Account Information

1. **Managed Accounts:** If a user is managing multiple accounts, they can be configured by clicking on the **[See List]** link.

Note: *Refer to the Property Manager Taxpayer Guide for detailed instructions.*

2. **Account Name:** Enter the name of the account *(i.e. Beachside Motel or XYZ Property Management, etc.)*

3. **Description/Notes:** Enter any notes or additional information about the account.

4. **First Rental Date:** Enter the first date that tourist taxes were collected for the account.

Note: *This field can not be edited by a taxpayer after it has been initially designated.*

Rental Property Information

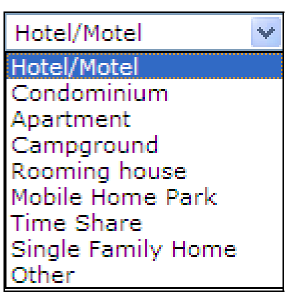
1. **Status:** Enter the status of rental property. *(i.e. New, Active or Inactive)*

Note: *This field may not be editable by a taxpayer. Taxing authorities have the option to have all new properties default to a status of 'New' so that they can be reviewed before they are active within Excise.*

2. **Parcel ID:** Enter the rental property's parcel ID number at the Property Appraiser's Office.

Note: *For assistance in finding a Parcel ID (Property Appraiser folio number) click on the* ***County Property Appraiser's Website*** *link. User will be directed to the Taxing Authorities PAO search site.*

3. **Type:** Select the type of rental property.



Note: *The list of available property types may vary by Taxing Authority.*

4. **Number of Units:** Enter the number of units for the property.

5. **Name:** Enter the name of Rental Property. *(i.e. Oceanside Condo-Unit 123)*

6. **Attention:** Enter the property manager's name or the main point of contact.

Note: *You can view a Google® Map of this property if the address is complete by clicking on the* ***View Map of this Address*** *link.*

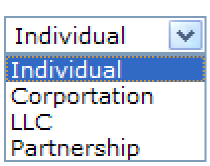
7. **Address:** Enter the property street address.
8. **Address 2:** Enter any additional property address info – Suite #, Unit #, building name, etc.
9. **City:** Enter the city where property is located.
10. **State:** Enter the state where property is located.
11. **Zip:** Enter the zip code where property is located.
12. **Phone/Alternate Phone:** Enter the property's phone number and alternate phone number, such as a cell phone number.
13. **Fax:** Enter the property's fax number.
14. **Email:** Enter the property's email address.

Owner Information

1. **Owner Name:** Enter the property owner's name.
2. **Owner Attention:** Enter the property owner's attention or alternate point of contact.

Note: *You can view a Google® Map of this property if the address is complete by clicking on the **View Map of this Address** link.*

3. **Address:** Enter the property owner's address.
4. **Address 2:** Enter the property owner's address info – Suite #, Unit #, building name, etc.
5. **City:** Enter the city where property is located.
6. **State:** Enter the property owner's state.
7. **Zip:** Enter the property owner's zip code.
8. **Phone/Alternate Phone:** Enter the property owner's phone number and alternate phone number, such as a cell phone number.
9. **Fax:** Enter the property owner's fax number.
10. **Email:** Enter the property owner's email address.
11. **Business Type:** Select the property owner's business type.



***Note**: The list of available business types may vary by Taxing Authority*

12. **Federal Tax ID** or **Social Security Number:** Enter the Federal Tax ID or Social Security information for the property owner.

Note: *Federal Tax ID and Social Security Numbers are stored on a secured server (https), and are encrypted upon being entered into Excise.*

13. **Sales Tax Number:** State Sales Tax Number that is registered to the property.

Note: *Sales Tax Numbers are provided by the state Department of Revenue. If you have not yet registered with the Department of Revenue, you need to do so. In the case of a pending tax number please enter "pending" in this field.*

14. **Purchase Date:** The date that the rental property was purchased.

12. Click on **Save Changes**.

Save Changes

Result: The new account is created and Excise will return to the **View Account Screen.**

Thank you for registering your account, please be advised that it will take 3-5 business days for this account to be activated before you can process a tax return. If you have any questions, please contact us.

Note: *You will not be able to access returns until the Taxing Authority staff reviews your account information and activates the account (see status).*

Shore Properties, Inc. - Account #489

Account	Name	Property Address 1/1	Status	Balance Due
View	Shore Properties, Inc.	123 Main Street Sanford, FL 32771 View Payments Made By Management Company	New Account	$700.00

SUBMITTING TAX RETURNS AND PAYMENTS

Taxpayers have the ability to complete their tax return and submit it to the Taxing Authority using the Excise secure website. Most Taxing Authorities will also allow a taxpayer to remit payments online via an electronic payment through the secure website. The following few pages will walk a user through accessing and completing their tax return, as well as instructions on how to make a payment.

Completing a Tax Return

The Excise system allows a taxpayer access to their currently due and past due tax returns. Follow the steps below to complete a tax return.

1. From the **Account Summary Screen**, select a tax return.

Miller Investment Group - Account #434

Account	Name	Property Address 1/1	Status	Balance Due
View	Miller Investment Group	321 FAIRWAY BLVD Orlando, FL 32806	Active Account	$14,112.46 Credit: $37790.14

Return Period	Due By	Due	Paid	Balance Due	Status
June 2009 R	6/30/2009	$50.00	$0.00	$50.00	Pending
July 2009 R	8/20/2009	$50.00	$0.00	$50.00	Pending
August 2009 R	9/21/2009	$50.00	$0.00	$50.00	Pending
September 2009 R	10/20/2009	$50.00	$0.00	$50.00	Pending
October 2009 R	11/20/2009	$0.00	$0.00	$0.00	Pending
November 2009 R	12/21/2009	$0.00	$0.00	$0.00	Pending

Result: The enter Tax Return window appears.

Enter Tax Return 10/2009 : ACCT# 434 - Mel Miller

Period: October 2009 Normal

Name: Miller Investment Group

Account #: 434

Description: 321 FAIRWAY BLVD
Orlando, FL 32806

As Of Date: 11/17/2009 Due Date: 11/20/2009

Return Status: Pending Submit Date: N/A

Nights Sold	
A. Taxable Nights Sold:	0
B. Tax Exempt Nights Sold:	0

*** NOTE ***
IF YOU ARE ENTERING A LARGE AMOUNT OF RETURN INFORMATION, OR AN AMOUNT OF DATA THAT MAY TAKE LONGER THAN 20 MINUTES. PLEASE CLICK THE "SUBMIT" BUTTON BELOW PERIODICALLY. THIS ACTION WILL SAVE YOUR DATA AND ALLOW YOU TO CONTINUE YOUR ENTRY.

Return Item	Calculated
1. Gross Rental Receipts:	0.00
2. Exempt Rental Receipts:	0.00
3. Taxable Rental Receipts:	0.00
4. Total Tax 6%: ☐ Override	0.00
5. Less - Collection Allowance:	0.00
6. Plus Penalty:	0.00
7. Plus Interest:	0.00
Total Amount Due:	0.00

Filing Return Information

Any late returns will incur a minimum penalty charge of $50 and will be assessed interest, the rate for this month is 9%.

1. **Gross Rental Receipts:** The total amount of rentals for the reporting period.

2. **Exempt Rental Receipts:** Any rentals exempt from the tourist development tax.

3. **Taxable Rental Receipts:** The amount of taxable rentals (line 1 minus (-) line 2).

4. **Total Tax:** The total of local option tourist development tax collected. Please use Override check box if you collected more than the required percentage.

5. **Less – collection allowance:** 2.5% of the first $1,200.00 in taxes due (line 4) if this return is filed within 20 days from the last day of the reporting month. The maximum collection allowance is $30.00.

6. **Plus Penalty:** If delinquent (filed after the 20th day of the month following the reporting period), 10% of the amount of line 4, but in no case shall the delinquent penalty be less $50.00.

7. **Plus Interest:** If delinquent (filed after the 20th day of the month following the reporting period), calculated at the current

Submit | Move | Cancel

2. Enter the **Gross Rental Receipts**.
3. Enter the **Exempt Rental Receipts**.

   Result: The Total Amount Due is calculated.

Note: *The calculation is based on the Return being filed and paid on the current date. If you do not submit full payment as of the current date, the total due may change depending on late penalty and interest. Please refer to the* ***Instructions for completing tax return on the return screen*** *for specific Taxing Authority information.*

4. Did you collect taxes in excess of the calculated amount?

   If **No**, proceed to #5.

   If **Yes**, Check the **Override** box in line 4 and enter in the exact amount you collected.

Note: *This will only allow you to enter an amount in excess of the calculated amount.*

5. Check over the return for the correct period, account # and amounts. Should a taxpayer have questions regarding their calculations, please contact the Taxing Authority.

Return Item	Calculated
1. Gross Rental Receipts:	50,000.00
2. Exempt Rental Receipts:	0.00
3. Taxable Rental Receipts:	50,000.00
4. Total Tax 6%: ☐ Override	3,000.00
5. Less - Collection Allowance:	30.00
6. Plus Penalty:	0.00
7. Plus Interest:	0.00
Total Amount Due:	2,970.00

Submit Move Cancel

6. Click the **Submit** button.

   Submit

Result: The payment screen appears.

7. All outstanding balances will appear. If a taxpayer has items which they do not wish to pay at this time, they may skip over those returns and only enter in payment amounts for the selected return(s) that they wish to submit payment(s) on.

Note: *If the Taxing Authority requires taxpayers to pay all outstanding amounts owed on their account(s) this option will be disabled.*

Miller Investment Group - Account #434

Return Balances Due - Prior Credit Available: $37790.14

Return Period	Due By	Due	Paid	Balance	Payment Amount
March 2008 R	4/20/2008	$50.00	$0.00	**$50.00**	50.00 - Use Credit
June 2008 R	7/21/2008	$16,500.00	$15,000.00	**$1,500.00**	1,500.00 - Use Credit
August 2008 R	9/22/2008	$18,082.46	$6,170.00	**$11,912.46**	11,912.46 - Use Credit
October 2009 R	11/20/2009	$2,970.00	$0.00	**$2,970.00**	2,970.00 - Use Credit

Please Select a Payment Option 1, 2, or 3 below.

Balance Due: $16,432.46
Total Payment: $16432.46
Difference: $0.00

1. Click Here to Pay Now Online
You can pay online via ECheck by clicking this option.

2. Click Here to Pay Later
Please note penalties and interest are applied to any returns submissions and payments that are late.
You may return to this page later by clicking "Enter Payment" on the left

3. Click Here to Print Mail in Form
Click the above link and select your browser's print option (usually under the file menu) and send the printout along with check to:
County Location
1234 Main St.
City, ST 12345

Note: *Payment methods may vary by Taxing Authority. If you choose not to pay online, skip to step # 11.*

8. Click **Pay Now Online** to process your payment immediately.

Result: The **Pay Online by Electronic Check** appears.

Select a payment account: Excise Bank Account (****1112) Edit
New Account:
Schedule On: 11/17/2009

Ref/Check Number: Ck # 12345
Submit Cancel

9. Select an existing stored payment account from the drop down menu or enter a new account. After the desired account is designated, enter the payment amount, the scheduled in date and reference/check number.

Note: *A taxpayer may also opt to enter another account to process their Echeck payment from. Remember to click on the 'Save Account Info for later' box if you wish to retain the newly entered account information for later usage. A taxpayer can also edit this information any anytime on their Edit Profile Screen using the link at the top of the screen.*

Submit

Result: You will receive a payment confirmation email as well as be taken to a payment confirmation screen.

Payment Receipt

Receipt for Tourist Development Tax Payment to Sample County

Receipt #2371	
Taxpayer:	
Receipt Date:	11/17/2009 4:11 PM
AsOf/Postmark Date:	11/17/2009
Accounting Date:	10/14/2009
Payment Type:	E-Check
Account:	Excise Bank Account (****1112)
Reference:	Ck # 12345
Total Paid:	$2,970.00
E-Payment Convenience Fee:	$0.00
Grand Total:	$2,970.00

Returns Paid

Account	Return Period	Amount Paid	History
434 (Miller Investment Group)	October 2009 R	$2,970.00	

Print this page

10. To print the receipt, click on the **Print this page** icon at the bottom of the receipt.

11. Click **Pay Later** to save your return information and return to the Account Summary Screen. This allows a taxpayer to return later to pay. (This option can be used if a taxpayer wants to complete more returns and then pay them all at once.)

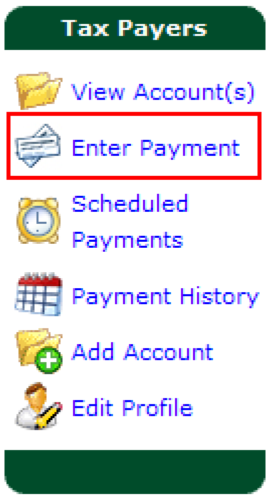
12. Click **Print Mail in Form** to print a copy of the return(s) to mail into the Taxing Authority with payment.

Result: The return(s) and any specific mail in instructions will pop up in printable form.

Entering a Payment

Taxpayers are directed to the Payment Screen at the time of submitting a return. However, a user can also go directly to the Payment Screen to pay outstanding returns by completing the following the steps below.

1. From the menu, select **Enter Payment**.



Result: The Enter Payment Screen appears with any outstanding balances that are due on the account.

Follow steps 7-12 on pages 30 & 31 to complete a payment.

Applying a Credit Payment

Taxpayers are directed to the Payment Screen at the time of submitting a return. However, a user can also go directly to the Payment Screen to pay outstanding returns with credits on their accounts by completing the following the steps below.

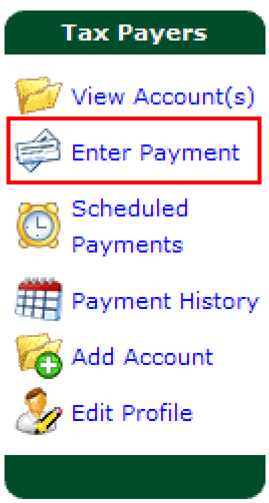
Note: *In order to apply a credit, please ensure that a credit exists on the account by referring to the View Account Screen.*

Property Management - Account #480

Account	Name	Property Address 1/2	Status	Balance Due
View	Property Management	123 Main Street Orlando, FL 12345-6789	Active Account	AU: $14,243.04 REFUND: $50.00 R: $17,718.66 Total: $32,011.70 Credit: $10759.36

Return Period	Due By	Due	Paid	Balance Due	Status
January 2004 AU	2/20/2004	$507.42	$0.00	$507.42	Submitted
March 2004 AU	4/20/2004	$50.00	$0.00	$50.00	Pending
August 2004 REFUND	9/20/2004	$50.00	$0.00	$50.00	Pending

1. From the menu, select **Enter Payment**.



Result: The Enter Payment Screen appears with any outstanding balances that are due on the account.

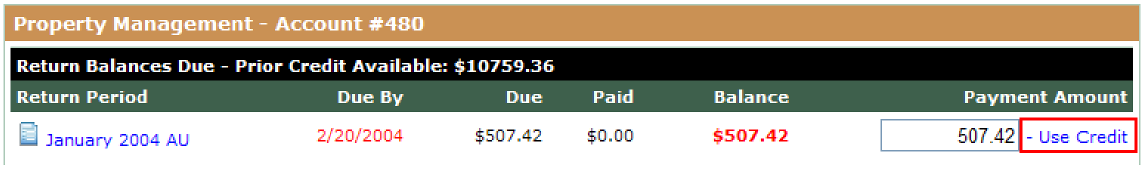
Note: *There will be a blank indicator bar which will indicate the amount of available credit.*

Property Management - Account #480

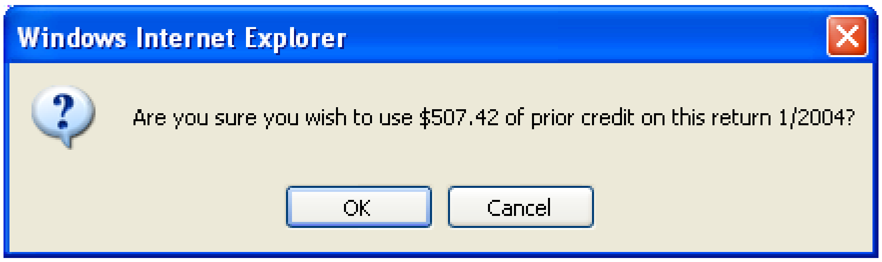
Return Balances Due - Prior Credit Available: $10759.36

Return Period	Due By	Due	Paid	Balance	Payment Amount

2. On the Enter Payment Screen, click on the blue **Use Credit** link next to the payment amount box.

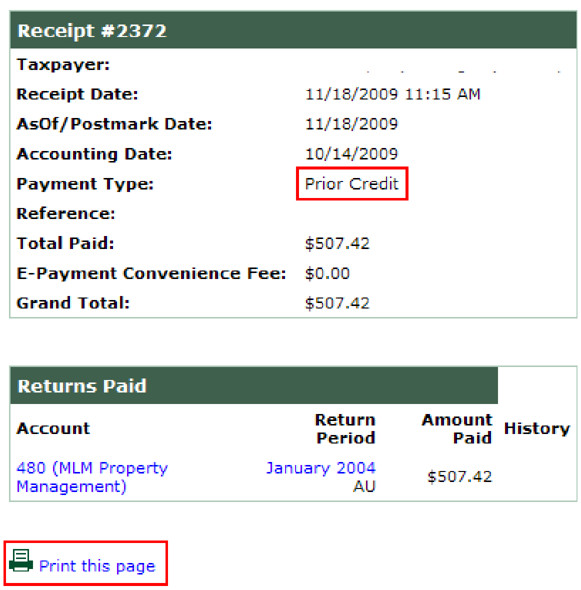


Result: Excise will prompt to confirm application of the credit.



3. Click on **OK** to apply the credit against the return, or click on cancel to return to the Enter Payment Screen.

4. After clicking OK, Excise will display a receipt confirming that the credit was applied against the return.

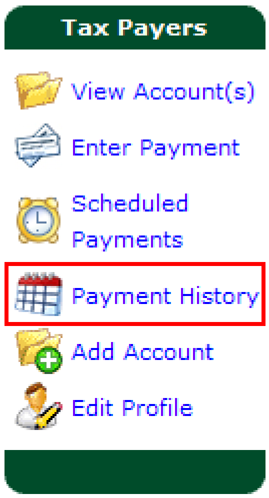


Note: To print the receipt, click on the **Print this page** icon at the bottom of the receipt.

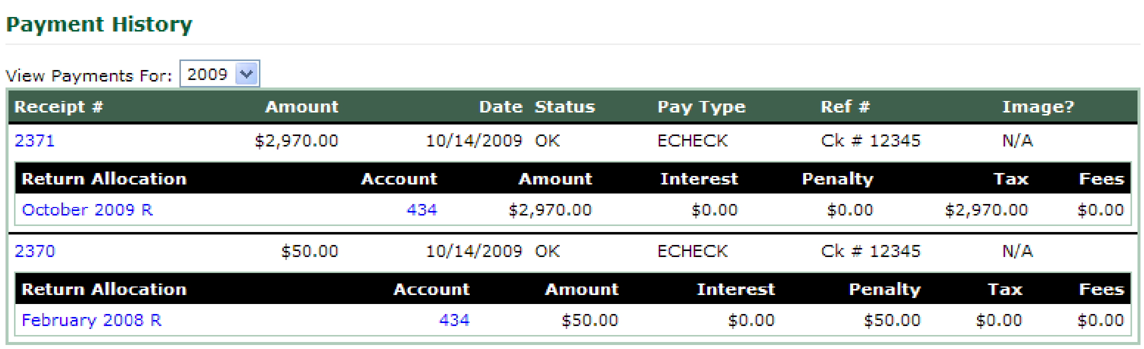
Viewing Payment History

You have the ability to view payment history. Follow the steps below to view your payment history.

1. From the menu, select **Payment History**.



Result: The payment history screen appears.



Payment History

View Payments For: 2009

Receipt #	Amount	Date	Status	Pay Type	Ref #	Image?
2371	$2,970.00	10/14/2009	OK	ECHECK	Ck # 12345	N/A

Return Allocation	Account	Amount	Interest	Penalty	Tax	Fees
October 2009 R	434	$2,970.00	$0.00	$0.00	$2,970.00	$0.00

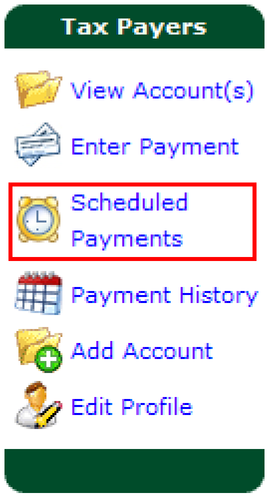
Receipt #	Amount	Date	Status	Pay Type	Ref #	Image?
2370	$50.00	10/14/2009	OK	ECHECK	Ck # 12345	N/A

Return Allocation	Account	Amount	Interest	Penalty	Tax	Fees
February 2008 R	434	$50.00	$0.00	$50.00	$0.00	$0.00

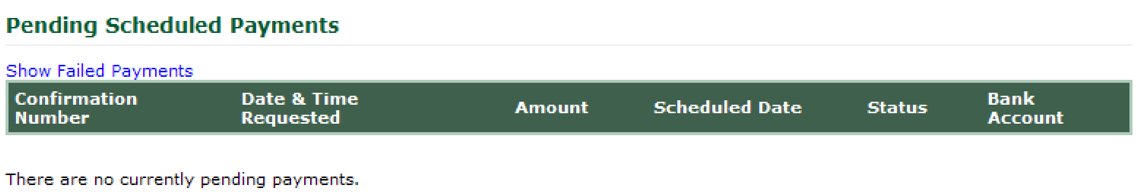
Viewing Scheduled Payments

You have the ability to view scheduled payments on an account. Follow the steps below to view your payment history.

1. From the menu, select **Scheduled Payments**.



Results: The **Pending Scheduled Payment** screen is displayed.



Note: *From this screen, a user may also access a list of failed payments on their account by clicking on the link.*