

# Homestead Credit Billing Process

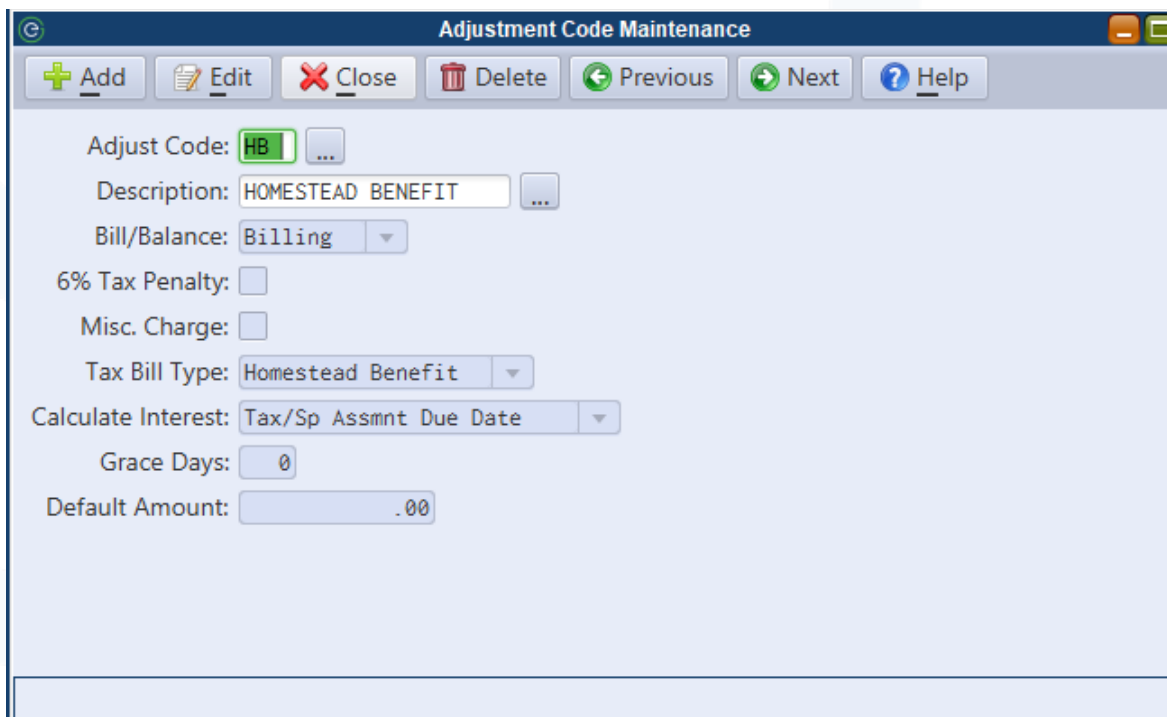
MCSJ SYSTEM CODE NEEDS TO BE August 1, 2019 or greater

## Creating the Adjustments

1. **Create Adjustment Code** - This step is **not** necessary if a Homestead Credit adjustment code already exists.

Go to *Billing/Collections > Tax Collection > Adjustments > Adjustment Code Maintenance*

Click on the **Add** button. Type in a Code and Description. Select *Billing* in the Bill/Balance dropdown. Select *Homestead Benefit* in the Tax Bill Type dropdown. Select *Tax/Sp Assessment Due Date* in the Calculate Interest dropdown. Click **Save**.

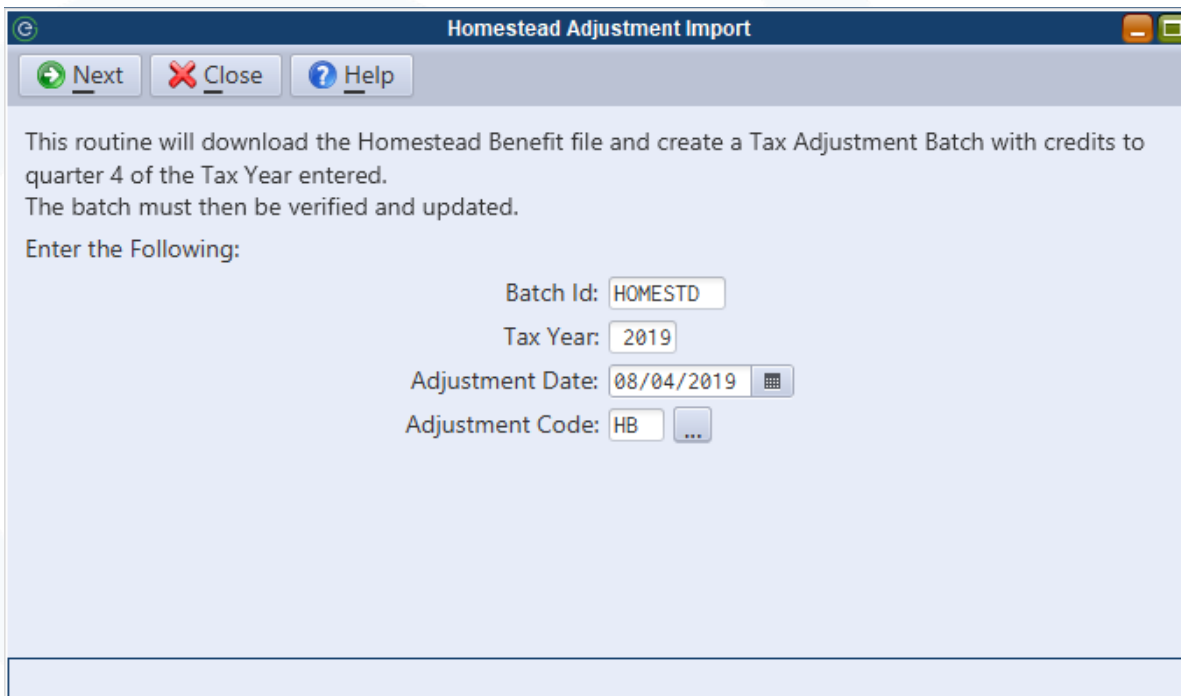
A screenshot of a web application window titled "Adjustment Code Maintenance". The window has a toolbar with buttons for Add, Edit, Close, Delete, Previous, Next, and Help. The form contains the following fields: "Adjust Code:" with a text input containing "HB" and a dropdown arrow; "Description:" with a text input containing "HOMESTEAD BENEFIT" and a dropdown arrow; "Bill/Balance:" with a dropdown menu showing "Billing"; "6% Tax Penalty:" with an unchecked checkbox; "Misc. Charge:" with an unchecked checkbox; "Tax Bill Type:" with a dropdown menu showing "Homestead Benefit"; "Calculate Interest:" with a dropdown menu showing "Tax/Sp Assmnt Due Date"; "Grace Days:" with a text input containing "0"; and "Default Amount:" with a text input containing ".00".

Adjust Code:	HB
Description:	HOMESTEAD BENEFIT
Bill/Balance:	Billing
6% Tax Penalty:	<input type="checkbox"/>
Misc. Charge:	<input type="checkbox"/>
Tax Bill Type:	Homestead Benefit
Calculate Interest:	Tax/Sp Assmnt Due Date
Grace Days:	0
Default Amount:	.00

## 2. Download/Import Credit Adjustments

Go to *Billing/Collections > Tax Collection > Adjustments > Homestead Adjustment Import*

Type in a Batch Id and enter 2019 as the Tax Year. The Adjustment Date will default to the current date. Select the Homestead Benefit Adjustment Code. Click the **Next** button to download and import the adjustments into an Adjustment Batch.

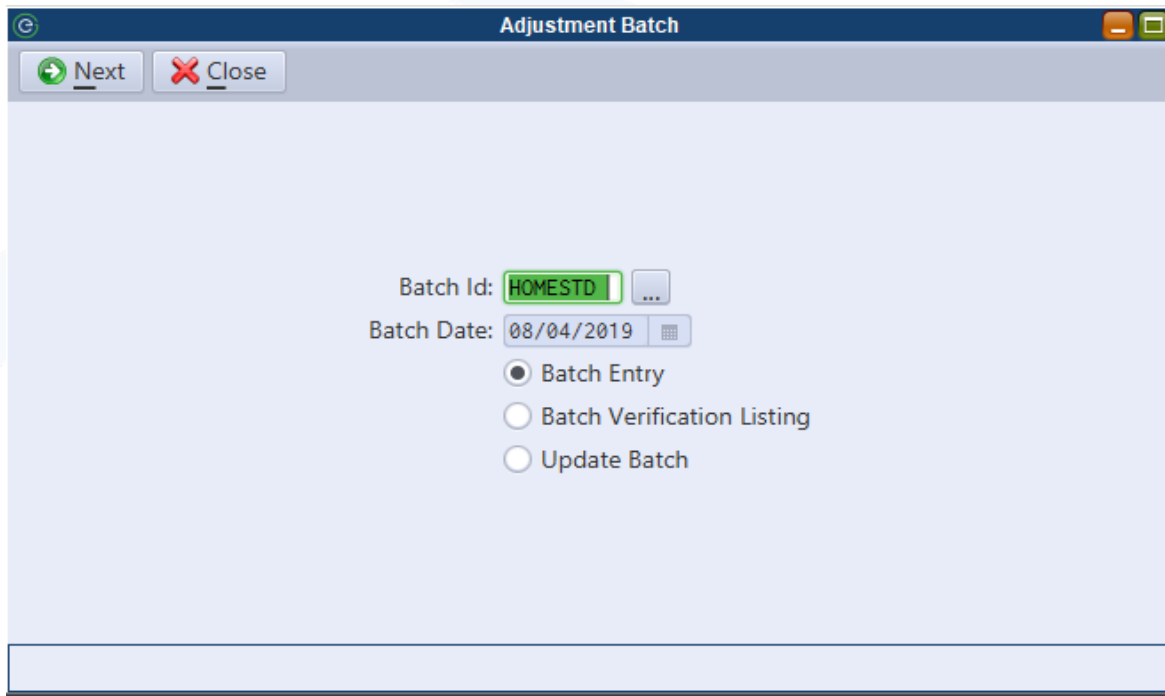
A screenshot of a software dialog box titled "Homestead Adjustment Import". The dialog has a blue header bar with the title and standard window controls. Below the header is a toolbar with three buttons: "Next" (with a green arrow icon), "Close" (with a red X icon), and "Help" (with a blue question mark icon). The main area of the dialog contains the following text: "This routine will download the Homestead Benefit file and create a Tax Adjustment Batch with credits to quarter 4 of the Tax Year entered. The batch must then be verified and updated. Enter the Following:". Below this text are four input fields: "Batch Id:" with the value "HOMESTD", "Tax Year:" with the value "2019", "Adjustment Date:" with the value "08/04/2019" and a calendar icon, and "Adjustment Code:" with the value "HB" and a dropdown arrow icon.

## 3. Verify and Update Adjustment Batch

*Note: Tax Collectors can log in to GovConnect (My New Jersey – <http://Portal.NJ.Gov>) and access a PDF verification form named "2019 Homestead Benefit Credits" that is posted in the Tax Collector Document Library. The information on the PDF should be compared to the Adjustment Batch verification listing to ensure that all the eligible properties are correctly credited. If you need assistance with your GovConnect access to the Document Library please email [egg@dca.state.nj.us](mailto:egg@dca.state.nj.us).*

Go to *Billing/Collections*> *Tax Collection*> *Adjustments*> *Adjustment Batch*

Print the Batch Verification Listing and verify your totals. If the totals are correct, update the batch.

A screenshot of a web application window titled "Adjustment Batch". The window has a dark blue header with the title and standard window controls (minimize, maximize, close). Below the header is a light blue toolbar with two buttons: "Next" (with a green arrow icon) and "Close" (with a red 'X' icon). The main content area is light blue and contains the following fields and options:

- Batch Id: A text input field containing "HOMESTD" and a dropdown arrow icon.
- Batch Date: A date input field containing "08/04/2019" and a calendar icon.
- Three radio button options:
  - Batch Entry
  - Batch Verification Listing
  - Update Batch

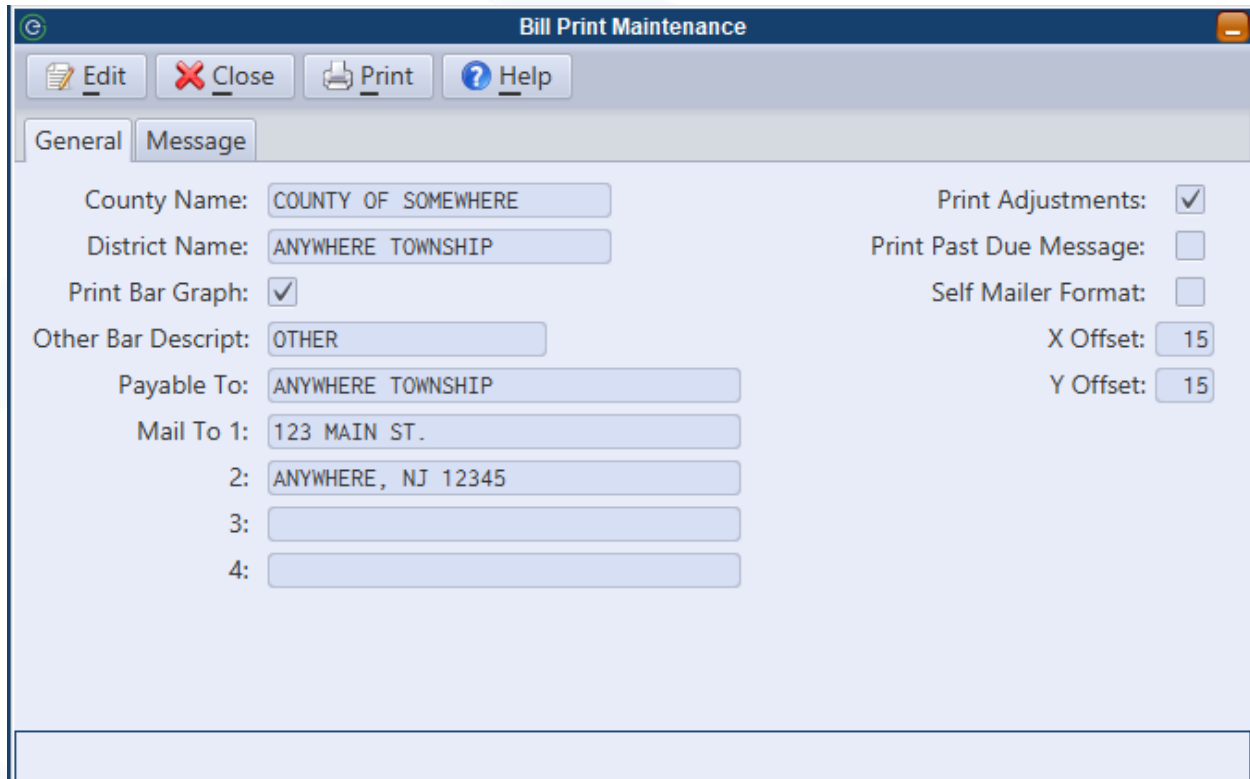
### Printing Homestead Bills (Only required if 4<sup>th</sup> quarter stubs have been previously mailed)

*Note: Separate homestead bills only need to be printed if you've already mailed 4<sup>th</sup> After Estimate bills or your 2019 Final/2020 Preliminary bills. If you've yet to mail tax bills containing the 4<sup>th</sup> quarter stub, the homestead adjustments will be reflected on the appropriate stub of both the 2019 Final and 4<sup>th</sup> After Estimate bills with a message indicating that the Homestead adjustment is included. Please note that you MUST select 'Print Adjustments' in the Bill Print Maintenance PRIOR to running the Create Tax Bill Extract for Regular or 4<sup>th</sup> After Estimate tax bills in order to reflect the Homestead adjustment on these bills. The Bill Print Maintenance is shown in the figure below.*

## 1. Complete Bill Print Maintenance

Go to *Billing/Collections>Tax Collection>Billing>Bill Print Maintenance*

Make sure the District Name and Payable To information is completed.

A screenshot of a software window titled "Bill Print Maintenance". The window has a menu bar with "Edit", "Close", "Print", and "Help" buttons. Below the menu bar are two tabs: "General" (selected) and "Message". The form contains several fields and checkboxes. On the left side, there are fields for "County Name" (COUNTY OF SOMEWHERE), "District Name" (ANYWHERE TOWNSHIP), "Print Bar Graph" (checked), "Other Bar Descript" (OTHER), "Payable To" (ANYWHERE TOWNSHIP), and "Mail To" (123 MAIN ST., ANYWHERE, NJ 12345). On the right side, there are checkboxes for "Print Adjustments" (checked), "Print Past Due Message" (unchecked), and "Self Mailer Format" (unchecked), along with numeric input fields for "X Offset" (15) and "Y Offset" (15).

## 2. Check Grace Days

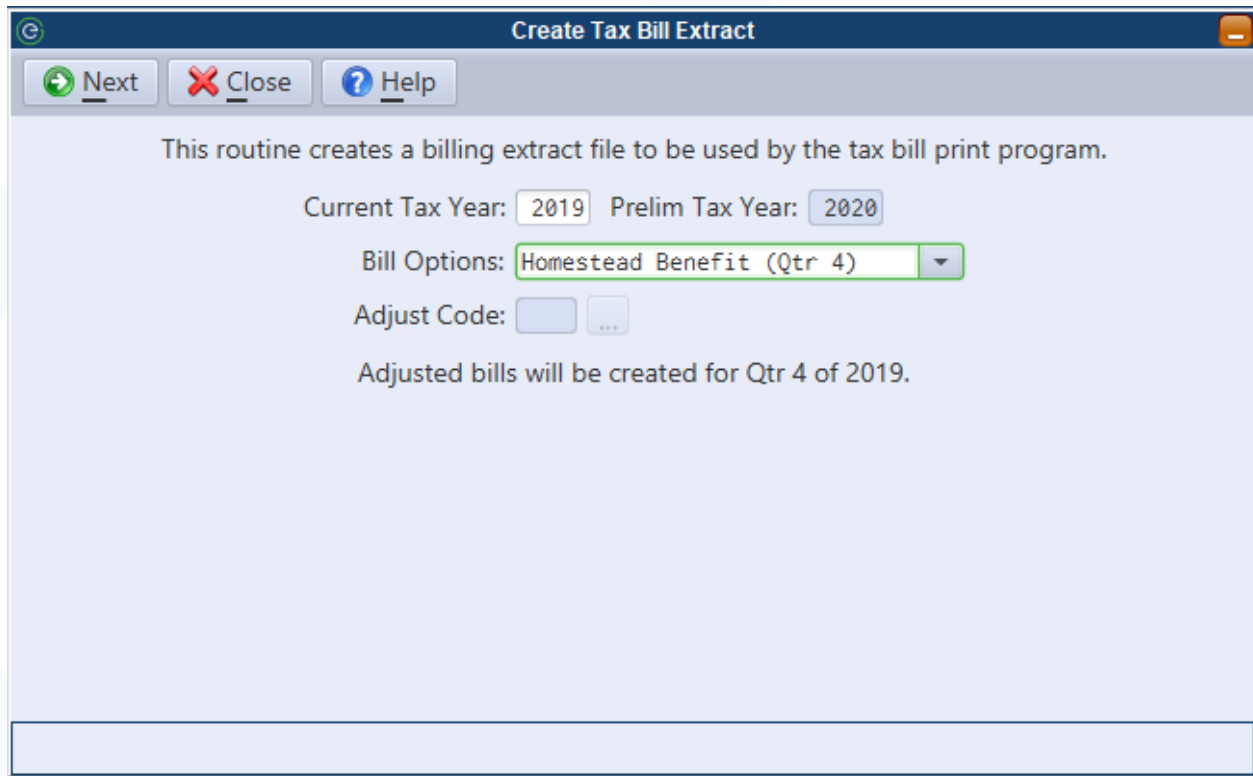
Go to *Billing/Collections>Tax Collection>Update Taxes>Due Date Maintenance*

Make sure the grace days for the 4th quarter of 2019 are correct.

### 3. Create Tax Bill Extract

Go to *Billing/Collections>Tax Collection>Billing>Create Tax Bill Extract*

Choose *Homestead Benefit* in the **Bill Options** drop-down. Click the **Next** button to create the extract.



The screenshot shows a window titled "Create Tax Bill Extract" with a standard Windows-style title bar. Below the title bar are three buttons: "Next" (with a green arrow icon), "Close" (with a red X icon), and "Help" (with a blue question mark icon). The main content area contains the following text and controls:

This routine creates a billing extract file to be used by the tax bill print program.

Current Tax Year:  Prelim Tax Year:

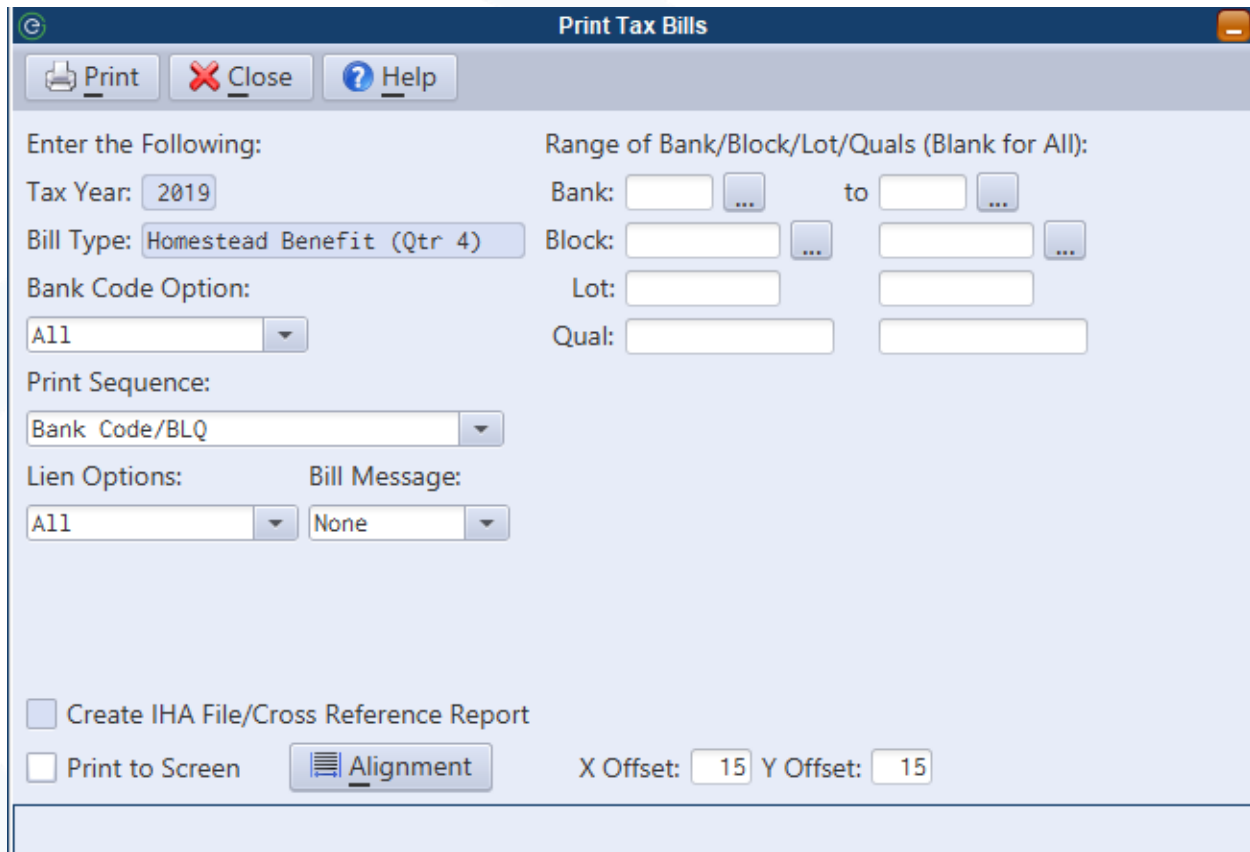
Bill Options:  ▼

Adjust Code:  ...

Adjusted bills will be created for Qtr 4 of 2019.

#### 4. Print Tax Bills

Go to *Billing/Collections>Tax Collection>Billing>Print Tax Bills*



The screenshot shows a web-based application window titled "Print Tax Bills". At the top, there are three buttons: "Print" (with a printer icon), "Close" (with a red X icon), and "Help" (with a question mark icon). Below these buttons, the form is organized into two columns. The left column is titled "Enter the Following:" and contains: "Tax Year:" with a text box containing "2019"; "Bill Type:" with a dropdown menu showing "Homestead Benefit (Qtr 4)"; "Bank Code Option:" with a dropdown menu showing "All"; "Print Sequence:" with a dropdown menu showing "Bank Code/BLQ"; "Lien Options:" with a dropdown menu showing "All"; and "Bill Message:" with a dropdown menu showing "None". The right column is titled "Range of Bank/Block/Lot/Quals (Blank for All):" and contains: "Bank:" with two text boxes and a "to" label; "Block:" with two text boxes; "Lot:" with two text boxes; and "Qual:" with two text boxes. At the bottom of the form, there are two checkboxes: "Create IHA File/Cross Reference Report" and "Print to Screen". To the right of the "Print to Screen" checkbox is an "Alignment" button and two text boxes for "X Offset:" (containing "15") and "Y Offset:" (containing "15").

*Note: Utilize the options in the **Bank Code Option** combo-box to print original and/or advice bills*