Tax Discovery Online

User's Guide

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Introduction

The Tax Discovery Online System is a web application that assists the collector with the major processes in the tax collection process in order to save time in the collection process. This also has support mechanisms that allow collectors to cooperate and support one another through the process and minimize (or eliminate) the need for external spreadsheets and documents.

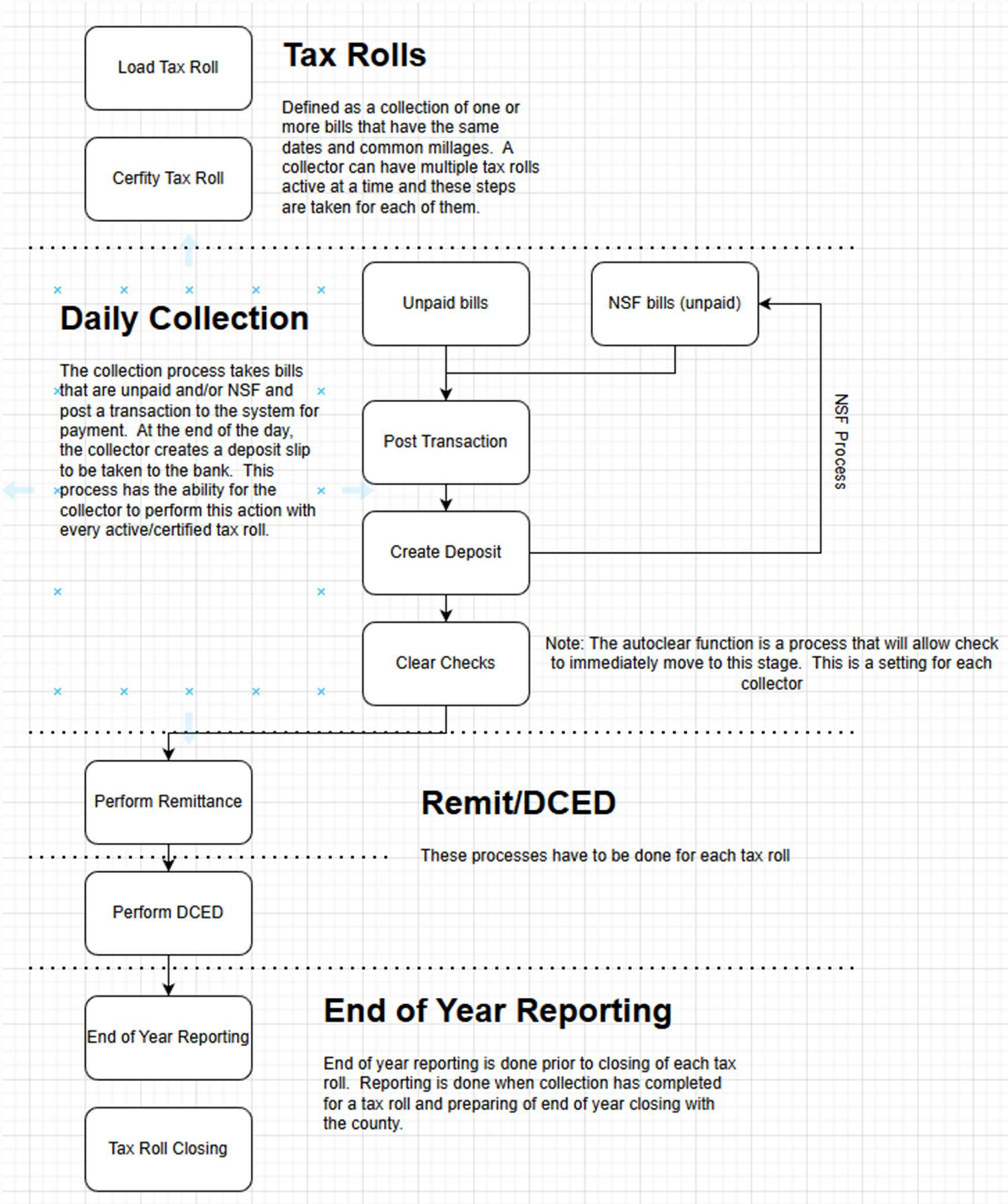
Tax Discovery has been and continues to be for the collector. Collectors have provided the specifications of this application and in the end, they dictate what is/is not needed. Tax Discovery is continuously making improvements to match the needs of the collector based upon the changes of the process and the laws that are passed.

Special Notes on this document:

The screen captures are from when the document was created and are subject to change as the application is enhanced. They are meant to be a guide to adding understanding for the collector. These will be updated with the enhancements as they become available, however, if there are minor differences there could be an out of sync condition. The data captured in the screens are from a variety of different sources and none of it should be considered a reflection of any collectors data. The information displayed on the pages will be different for each collector however the functionality, meaning what you can do, is the same.

Any clarification or additions that a collector believes should be added to this document to assist other collectors is welcome. Please open a ticket in the Tax Discovery System and that information will be added when appropriate.

The Tax Roll Lifecycle Flow



Terms used in Tax Discovery

TDOL

Acronym for Tax Discovery Online

Tax Roll

A tax roll is signified by two pieces of information, fiscal year and fiscal sub year. The fiscal year is the year in which the tax bill has been taxed and the sub year is an indicator of the type of bills within. Sub Years with the prefix of Normal- refers to when every parcel that the collector is responsible for has been billed. Any sub year without the Normal- prefix, is considered an interim bill tax roll. Interim Tax Rolls do not bill every parcel, just specific parcels that have been loaded based upon the taxing authority's specifics.

Parcel

A parcel refers to a property.

Bill

A bill refers to a taxing statement for a parcel that requires payment and collection.

Posting

Posting is the action the tax collector makes toward paying tax bill(s) for a taxpayer. The result of this action is a transaction.

Transaction

The recorded event of paying one or more bills for the taxpayer.

Deposit

The process of taking all the monies collected and creating a deposit slip

NSF

This is when a method of payment from the taxpayer has not been honored.

Remittance

This is the process of marking the specific bill line items as being prepared for the DCED.

DCED

This is the process of taking unremitted items for a taxing authority and prepare a DCED report for payment to the taxing authority.

Unpaid Bill

An unpaid bill is any bill that has not gone through the posting process. A bill is considered “paid” once the posting action has been completed regardless as to whether or not the bill payment has been sent back to the taxing authority.

Paid Bill

A paid bill is any bill that has gone through the posting process. A bill is considered “paid” once the posting action has been completed regardless as to whether or not the bill payment has been sent back to the taxing authority.

Payment Period

There are 3 payment periods in Tax Discovery, Discount, Face and Penalty. Generally, discount period encourages a 2% reduction of face, face is full payment and penalty is a 10% fee.

Payment Status

Payment Status refers to the stage in Tax Discovery a bill resides. Those stages are the following:

- Unpaid
- Posted
- Deposited
- Cleared
- Remitted
- DCED
- NSF

Money Type

Money type refers to the method of payment. In Tax Discovery, those methods are Check, Cash and Credit Card.

Money

This is the method of payment.

Tax Type

A tax type is a specification of line item on a bill. Tax Types are defined as each taxable item on a bill. *Special Note: More than one tax type can be associated with a taxing authority.*

Taxing Authority

A taxing authority is an entity that would be receiving the monies collected associated with assigned tax types (line items) of a bill.

Report

In Tax Discovery, a report is any page that can be printed to a piece of paper. Reports all function exactly the same regardless of the content of the report.

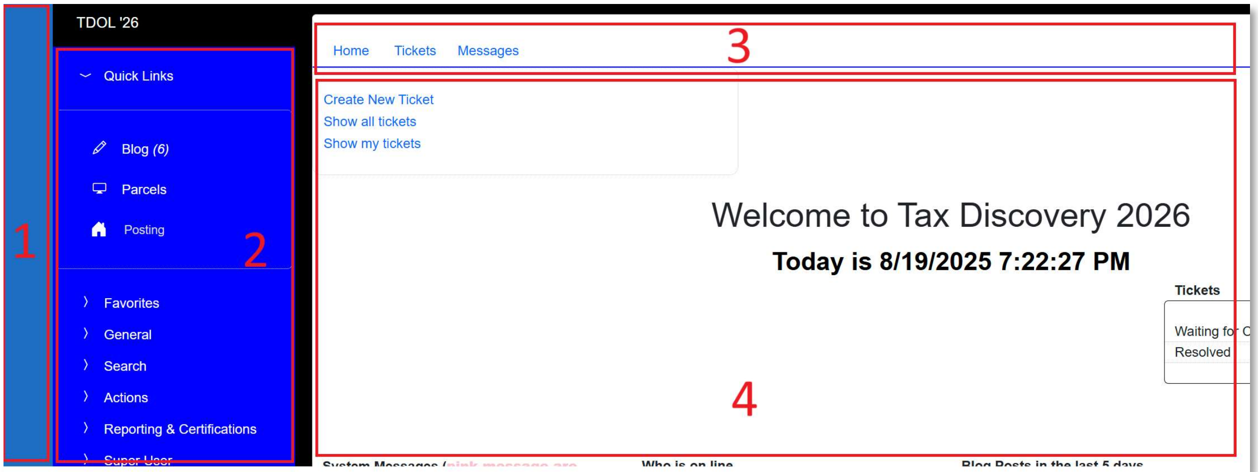
Page

A Page refers to what the collector sees on the screen.

Components of a Page

There are four major sections to each screen. Sections 1, 2 and 3 are on every screen however section 4 changes with each option. They are as follows:

1. Toggle button for Navigation Menu to hide and show
   a. Clicking this button will hide or show the Navigation Menu
2. Navigation Menu
   a. The Navigation Menu show all the functions of Tax Discovery
3. Top banner
   a. 4 main options, Home, Tickets (support), Messages (instant messaging) and Logoff
   b. If there is an urgent message from support, there will be a red marquee message that should be read immediately and possible immediate action taken on the collector
4. Main Page
   a. This is the main body of Tax Discovery based upon the function the collector is performing



Additional thoughts

Although the collector has the ability to make bank deposits, it is not responsible for ensuring that the banking ledgers is kept current. Tax Discovery only gives a utility to the collector toward making a bank deposit slip and nothing further. It is the responsibility of the collector to ensure that the bank accounts are in balance.

The accuracy of all information held within Tax Discovery is ultimately the responsibility of the collector. Tax Discovery is a tool to help the collector with the tax collection process. Skipping steps, not validating the information as needed is the ultimate responsibility of the collector.

Subsequent sections will go into detail of individual functions of Tax Discovery.

Navigational Tips

Whenever a collector sees a link on a particular piece of information, that allows for navigation to an appropriate part of Tax Discovery. Below is examples of those type of links:

Parcel Number – When the parcel number is a link, it will always take the collector to the parcel shown.

Bill #/Installment # - When the bill and installment numbers are a link, it will take the collector to the parcel page and automatically open the details of the bill shown.

Tax Roll – When the Tax Roll is a link, this will take the collector to the Dashboard for the tax roll shown.

Transaction Number – When the transaction number is a link, it will take the collector to the transaction details.

Deposit Number/Sub Number – when the deposit number and sub number are a link, that will take the user to the deposit details shown.

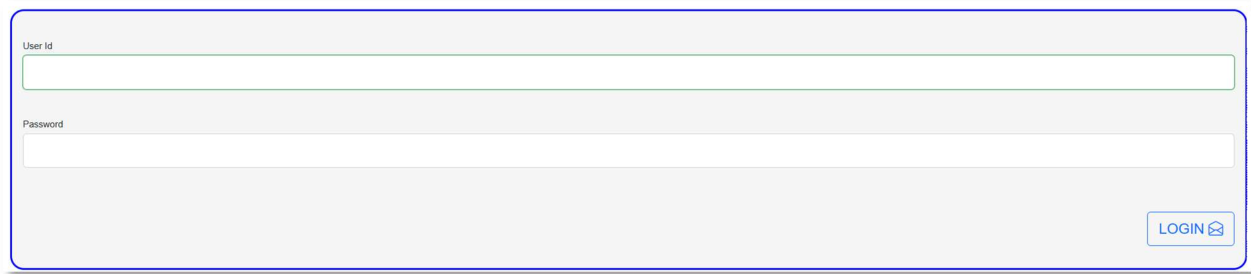
Remittance Number – when the remittance number is a link, it will take the collector to the remittance details shown.

DCED Number – When the DCED number is a link, it will take the collector to the DCED details.

Special Note to New Collectors

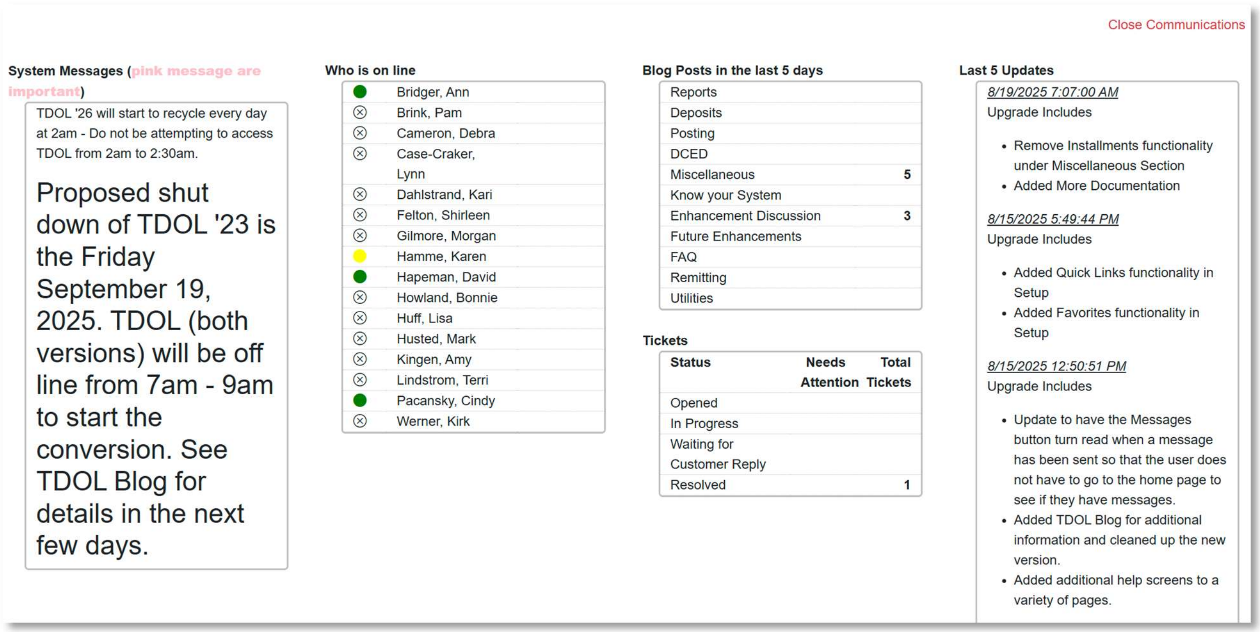
Tax Discovery is a tool to help collectors stay organized and keep records of the day to day activities. There is more to the tax collection process and procedures that may be unique to the collector's needs which Tax Discovery may not handle or a procedure that should be followed to ensure accuracy of the information in Tax Discovery and requirements of being a tax collector. All new collectors of this software are requested to have a sponsor (another collector using Tax Discovery) that will help guide them in the questions that come up throughout the process and best ways to handle it. This document is designed to show you the features and usage of Tax Discovery but does not give instruction on "what to do". When in question, reach out to your sponsor, use the BLOG, use the Messaging System to gain insight toward what you need.

Logging into Tax Discovery



Your HOME page

The home page starts with a communications center for the collector. This shows system (vendor) messages, urgent messages from support, instant messages from collectors, upgrade notations, BLOG Postings in the past 5 days as well as Tickets the require your attention.



Getting back to the home page is done by either:

1. Click Home at the top menu.
2. Click the TDOL '26 Logo in the upper left corner of the page.

Quick Links

This section in the Navigation Menu is always “open” to the user. The Parcel and Blog are defined for all users automatically and cannot be removed, however, the user has the ability to place links of their preference into this section. See the TDOL Settings part of this guide to see details on what is available and how to get additional Tax Discovery Quick Links added to this section

Favorites

This section is a series of web sites that the collector uses frequently. Similar in nature to adding favorites into the browser, the collector can use commonly accessed web sites to this list in order to save them for future use. The advantage of having favorites in Tax Discovery over favorites in a browser is that these links are always available to the collector regardless of which browser is being used or what computer is being used, whereas, favorites in a browser are specifically tied to the browser AND the computer. To maintain favorites, see the TDOL Settings part of this guide for details.

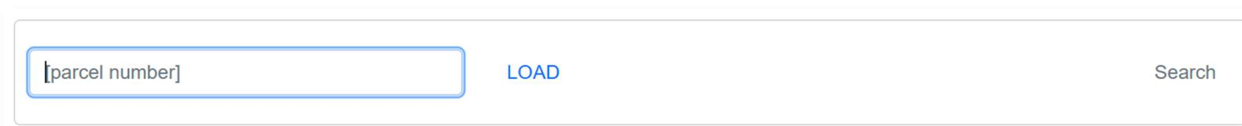
Parcels

Viewing Parcel is probably the most important page in Tax Discovery. This page is the warehouse of information (current and historical) about any parcel which the collector is responsible. The collector has the ability to look at all the bills associated with this parcel*, the details of each bill, ownership of the parcel, as well as make notes on the parcel or specific bill as needed.

* Bills associated with the parcel are those that have been loaded since the collector started with Tax Discovery. Any bills prior to the collector using this product are not available to the collector. If the collector has had Tax Discovery transferred from another collector, those bills may be a part of the historical data not guaranteed.

Getting started

To see a parcel, enter the parcel number in the form provided and click the load button.



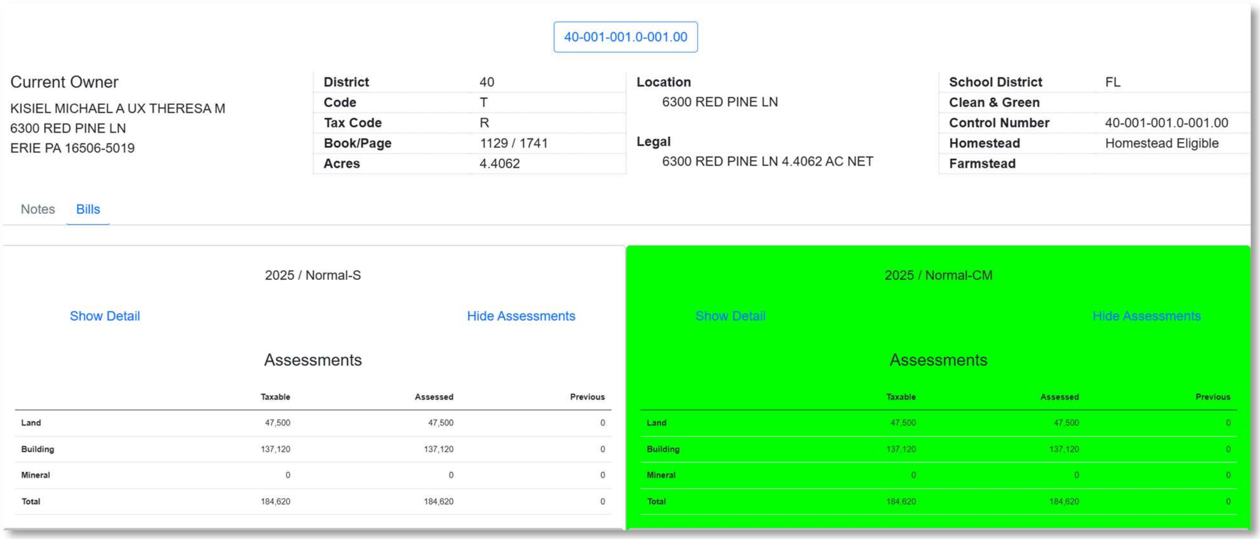
Clicking on the Search button will take the collector to the search mechanisms in Tax Discovery. Refer to the Search Section of this document for details.

Parcel Details

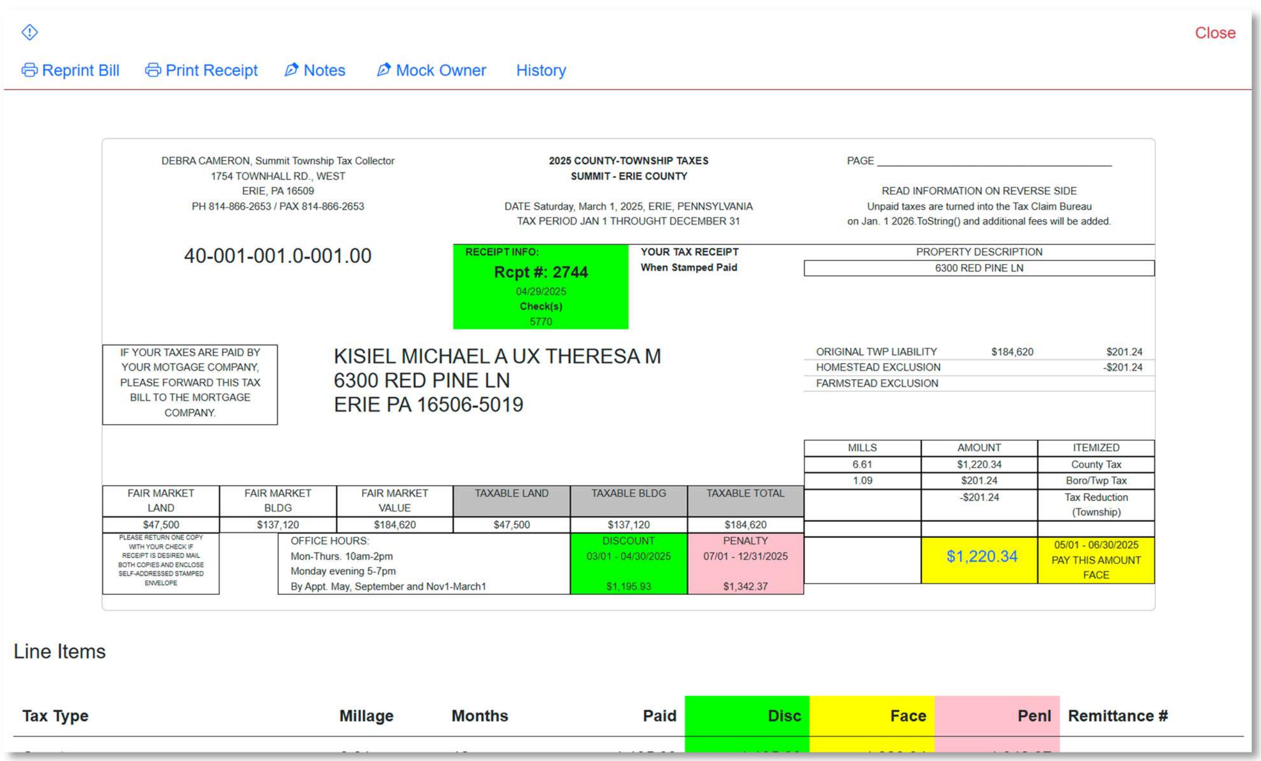
Once the parcel has been loaded, the collector will see a list of the bills (by default). Basic information is shown about the bill. There is a color coding to each bill as follows:

- White – Unpaid
- Green – Paid at Discount
- Yellow – Paid at Face
- Pink – Paid at Penalty
- Grey – Unpaid however attempt to pay resulted in NSF

The collector can view/add notes on a parcel if desired by clicking on the Notes button. There is a form to add additional notes. These notes are for the collector's benefit and it is recommended to be used. Tax Discovery has search features which includes notes to help find information that was entered into the system.



Clicking on the Tax Roll for the bill, the collector will see details of the specified bill.



Information On the bill Details

The first thing the collector sees is a representation of the tax bill similar to that of the paper copy that was mailed. If the bill is paid, the payment information summary is placed in the receipt information block with the appropriate color coding signifying the payment period in which it was paid.

As the collector scrolls down, the following information is also detailed:

1. The line items that make up the bill
2. The transaction that collected the payment (if paid)
3. The money(ies) used to pay the bill (if paid)
4. The DCEDs that were used to remit to the taxing authority(ies)
5. The Owner of the Bill
6. The Exoneration information (if the bill was exonerated)

The collector also has the ability to

1. Reprint the bill
2. Print a receipt (if paid)
3. Add notes to this bill
4. Add a Mock Owner to the bill.
    a. A mock owner is used when the collector wants to create the bill for the taxpayer who is not the taxpayer due to an ownership change. It is a utility to aid the collector in sending professional bills that need to be mailed to the new owner that was not specified prior to printing.
5. Show the history of the bill

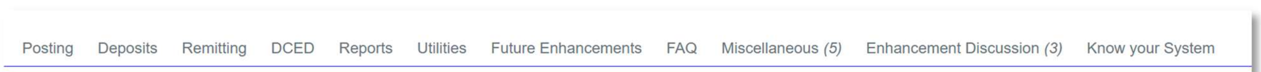
BLOG

The Tax Discovery BLOG is where collectors and support can share and communicate ideas, concerns, tips, etc. so that collaboration is positively fostered. Although it is not required to participate, it is high recommended for the collector to regularly review the BLOG for updates that could help answer questions or get tips from other collectors toward making this process easier. It is also a good way to collaborate on new ideas that can be brought to support toward implementation.

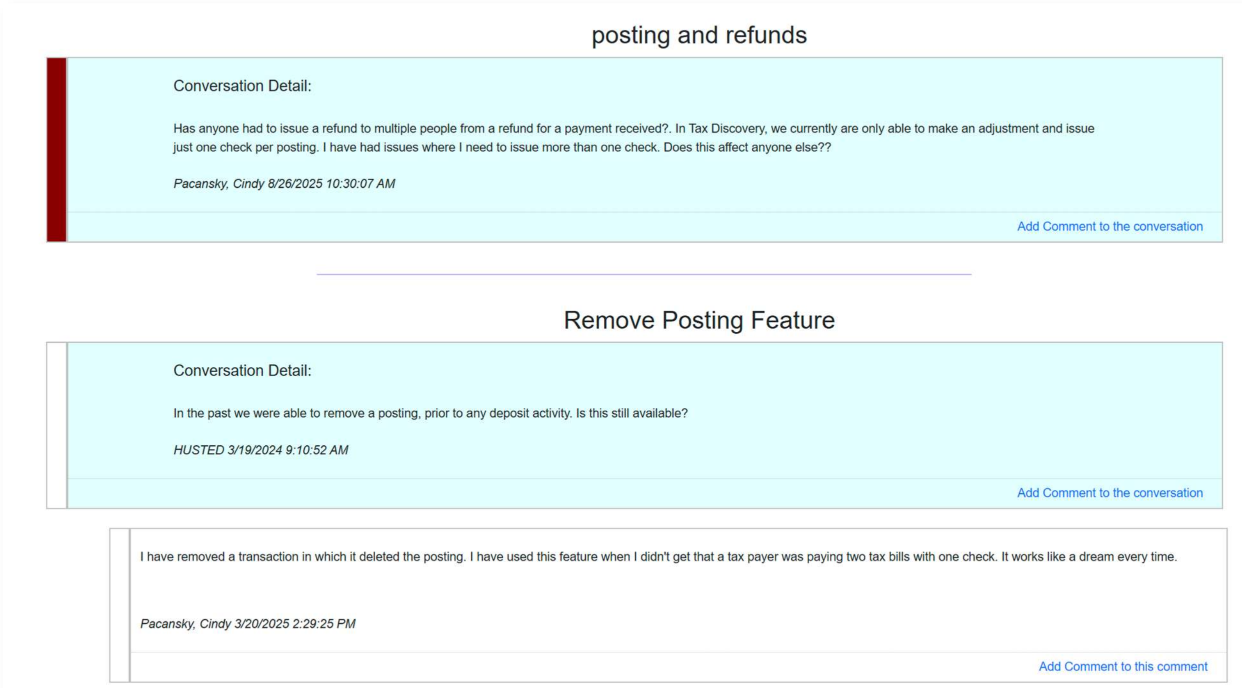
To get to the BLOG, the button can be found under the Quick Links section of the Navigation Menu. The collector will see a number in parenthesis which is the number of entries that have been made in the past 5 days.

BLOG Topics

When entering the BLOG, there are a series of buttons listed that are topics set up by support. These topics are subject to change and topics can be added by contacting support through the Ticketing System.

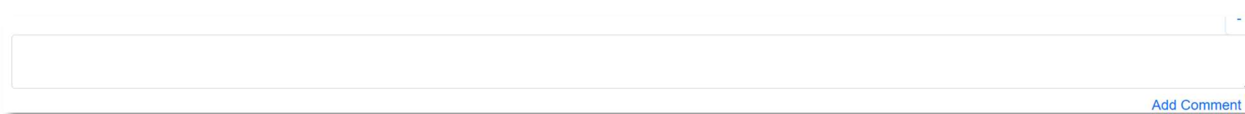


By clicking on a Topic, the user will see the Conversation and comments on that conversation as well as comments on the comments.



To start a new conversation, click on the Start New Conversation button, fill in the form and click the add button. From there, the Conversation will be added for others and yourself to comment upon. New Conversations (within the past 5 days) are backlit in light cyan.

To comment on the conversation, the collector can click on the Add Comment to conversation button, fill in the comment and click on Add. The same is true for a comment. You will see that a comment of a conversation or another comment is indented and in the order (most recent first) they came in. New Comments (within the past 5 days) have a red mark on the left.



Remember, the BLOG is a bulletin board for all. A Conversation starts the process and the collector/support can comment as much as desired for all to read.

Word of Caution: Civility is demanded. This is not a place to swear, complain, or degrade anyone. Support has the right to unilaterally take down any comment that is not professional or is not appropriate.

TDOL Settings

TDOL Settings is where the collector can tailor Tax Discovery that best matches their work style. There are 5 main sections to the settings

- General
- Profiles
- Quick Links
- Favorites
- Banking

General

The general settings is about the office of the tax collector. The name, address, office hours, etc. Enter the appropriate changes needed and then click that Save button. Much of this information is used throughout Tax Discovery so ensure that the information is accurate at all times.

Profiles

In the world of multiple types of devices, desktops, laptops, pads, phones, etc, there is a number of differences from device to device from speed to screen sizes. Tax Discovery gives the collector the ability to create multiple profiles that best match their needs and the individual characteristics of the device being used. These options are items that the collector can alter to best suit their needs. To add a new profile, click the plus sign and begin making the necessary changes and when complete, save the profile.

There is no limit to the number of profiles a user can have. If there are multiple people in the tax collectors office, these are tailored to the individual who signs into Tax Discovery and not global to all users in the office.

***One final note**: If a user has more than one profile, at the login, there will be a second screen requesting "which" profile to use. Select the appropriate profile and click continue.*

Quick Links

There are a number of different functions in Tax Discovery. Some are used more than others. As a result, the user can go to the quick links and add those options available to include them in the quick links section of the Navigation Menu in order to reduce the number of clicks to get to the desired page.

Favorites

Favorites are outside web sites that a collector frequents that assist in the collection process. The collector will add the URL (Address) of the site and give it a name. When clicking the Add button, the favorite is saved under the Favorites section of the Navigation Menu. To remove a favorite, click on the button with a trash can.

There is no limit to the number of favorites. This is a good tool because the favorites the collector saves in Tax Discovery will be available on any other device used.

Banking

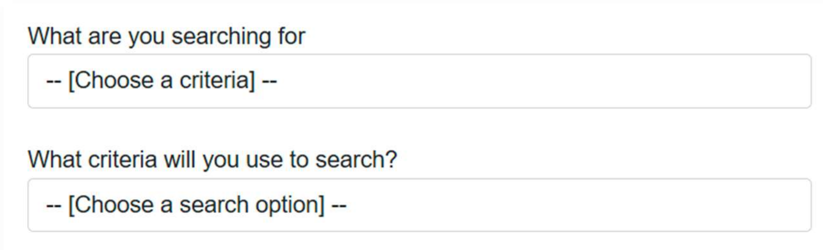
This section is used to give the collector the ability to add banking account information into Tax Discovery for the creation of a Deposit Slip. A collector can have up to 5 bank accounts in Tax Discovery. Enter the bank name and account in the form and click the add button. To remove an account, click the trash button.

Special Notes: Tax Discovery DOES NOT do your banking. It only provides a mechanism to create a deposit slip and this is the sole purpose of this information. If the collector does not wish to enter the entire account number, we recommend using the letter X in place of the numbers with the exception of the last 4 digits so that the collector can at least track where the money was slated to be deposited.

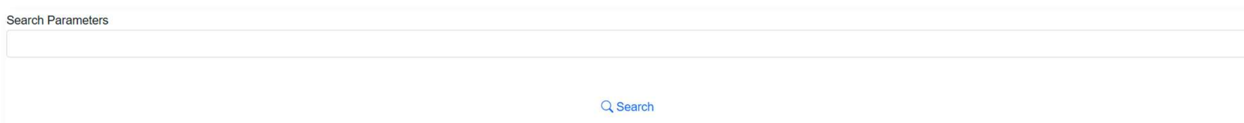
Search Tax Discovery

Tax Discovery has a built in Search Engine for looking up specific data (also known as "data mining").

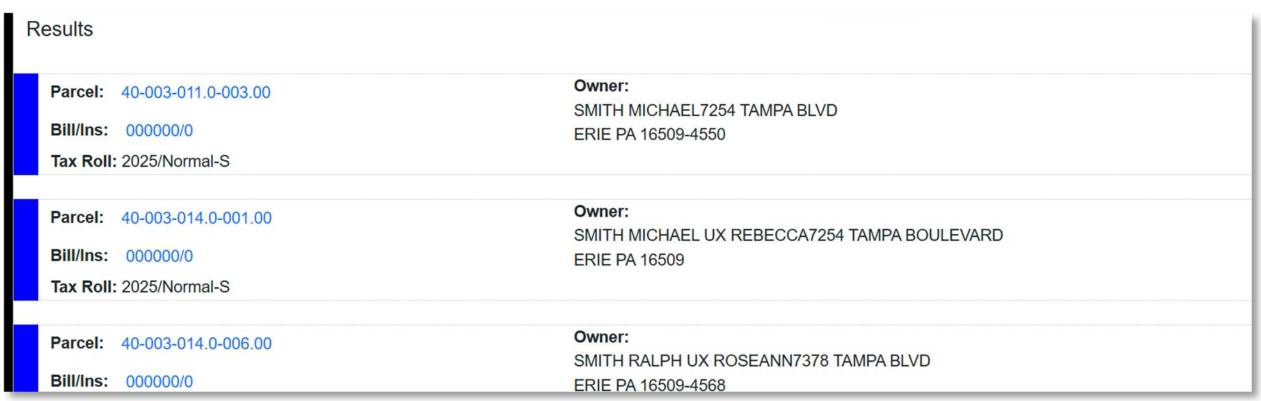
The collector needs to tell the engine "what" to look for first. Once that has been chosen, the next is a list of ways to do the search. Choose the appropriate information for the criteria.



Tax Discovery will provide a search text area for your search data. Enter what you are looking for and click the search button.



The results will be listed if information has been found. Parcel Numbers will open the Parcel, bill numbers will open the specific bill, transaction numbers will open the specific transaction and deposit number will open a specific deposit. There could be additional links (which will always have be blue in color) if the search had more details and can provide additional shortcut navigations.



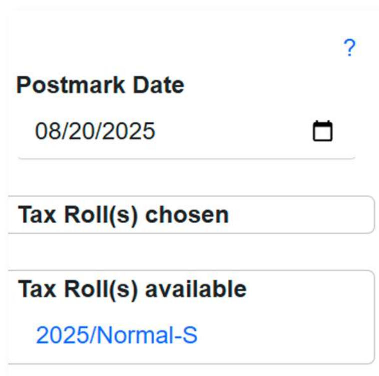
Posting

Posting for the collector is a major function of Tax Discovery. This process creates a transaction in the system.

The best analogy for the posting screen is to consider it similar to a checkout clerk and the posting is used to collect the items and money.

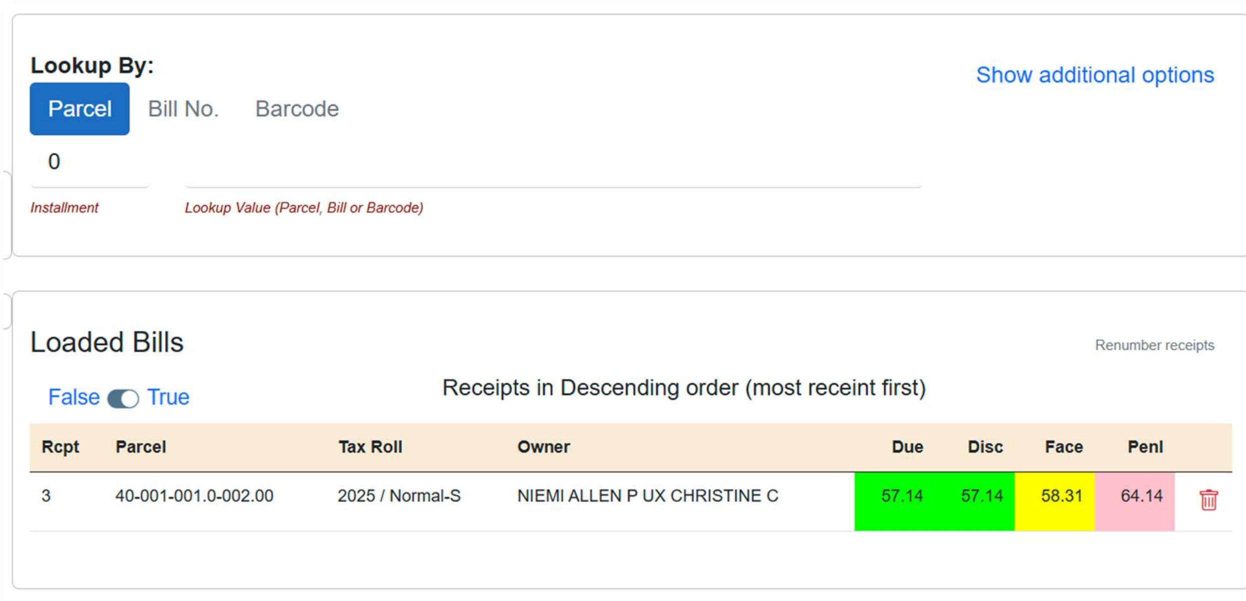
Basic Functionality

The first step for the collector is to choose the tax roll(s) that is to take place as well as the Postmark Date. The Postmark Date drives whether the bill is being collected at discount, face or penalty. By law, the collector is supposed to use the postmark date of the envelope and must be honored. If the collector receives a bill in December, however, the postmark on the envelope is March, the collector can change the date appropriately.



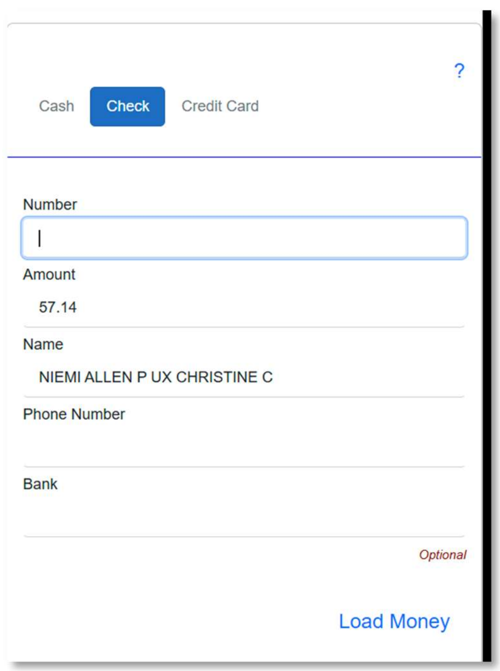
The next step is for the collector to enter the installment number as well as either the parcel, the bill number or scan the barcode depending on which lookup option is chosen. By default, Parcel is chosen and is generally the most complete option.

In Erie County, the option for Parcel or Barcode are exactly the same in that the value of the barcode is the parcel number. *A word of caution, Bill Number is not a recommended choice in that bill numbers are reused from one tax roll to another. If the collector has chosen more than one tax roll and uses the bill number, the possibility of retrieving an invalid bill is possible.*



When the bill has been found, the bill information on how much is due will be displayed to the collector.

The next step is to enter the information on how the bill is paid. Enter the check, cash or credit information appropriate for the payment and click the Load Money button.



The final step, once the bills and the money are equal, is to click the POST button displayed to create the transaction.

What is a transaction?

Tax Discovery is designed to accept payment for one or more bills just as it is able to accept more than one method of payment toward that transaction. Here are examples of what a transaction is.

> The taxpayer has one bill and is paying with one method of payment.
>
> The taxpayer has more than one bill and is paying with one method of payment.
>
> The taxpayer has one bill and is paying with more than one method of payment.
>
> The taxpayer has more than one bill and is paying with more than one method of payment

What is NOT a transaction?

Jane brings a bill and check. John brings a bill and check. They are not related toward one another. This is two transactions. Do not put both bills and both method of payments in the same transaction. Why not? Because when marking a method of payment as NSF, you are actually marking the transaction as NSF. If the in the above example was created as one transaction and John's check is invalid, the transaction is marked NSF and both John and Jane's bills are NSF even though Jane's method of payment was fine. Again, the collector needs to think like a "checkout clerk". You do not ring out two customers on the same transaction.

Advanced Functions

Installments – When a taxpayer has the ability to pay the bill in installments, the system converts installment 0 (full bill) to multiple individual bills. All the collector needs to do is change the installment to 1 (paying the first installment) and the conversion will happen and the first bill will be displayed appropriately. It is important for the collector to understand that the first installment must be paid and subsequent installments paid in order (i.e. 1, 2, 3, 4 ..... n).

Multiple Bills – By default, after each bill has been entered, the cursor automatically moves to the check information. If the user has a large number of bills, clicking on the Show additional options button will allow the collector to turn on the multiple bills button to keep the cursor at the lookup field and not advance to the check information.

Adjustments are used by the collector. An adjustment could be that the taxpayer over paid and a refund is due that the collector will mail a check. There are times where the amount of money is off by a few cents and the tax collector is going to absorb the different. This is known a petty cash. This adjustment will be logged into the system. It is the responsibility of the collector to make good toward all adjustments.

Final Notes

Pennsylvania law states that each bill must have a unique receipt number. The receipt numbers are preferred to be in order from 1 to n on EACH tax roll, however, be cautious in that receipt numbers are generated by the system. Gaps may occur as the result of various reasons throughout the life of the collection process. **It is the responsibility of the collector to understand how receipt numbers are utilized.**

In the money section, there are two optional fields, Bank and Phone number. These are at the collector's discretion. If the collector does not wish to have those fields, they can be turned off in TDOL Settings. See TDOL Setting section for additional information.

Transactions

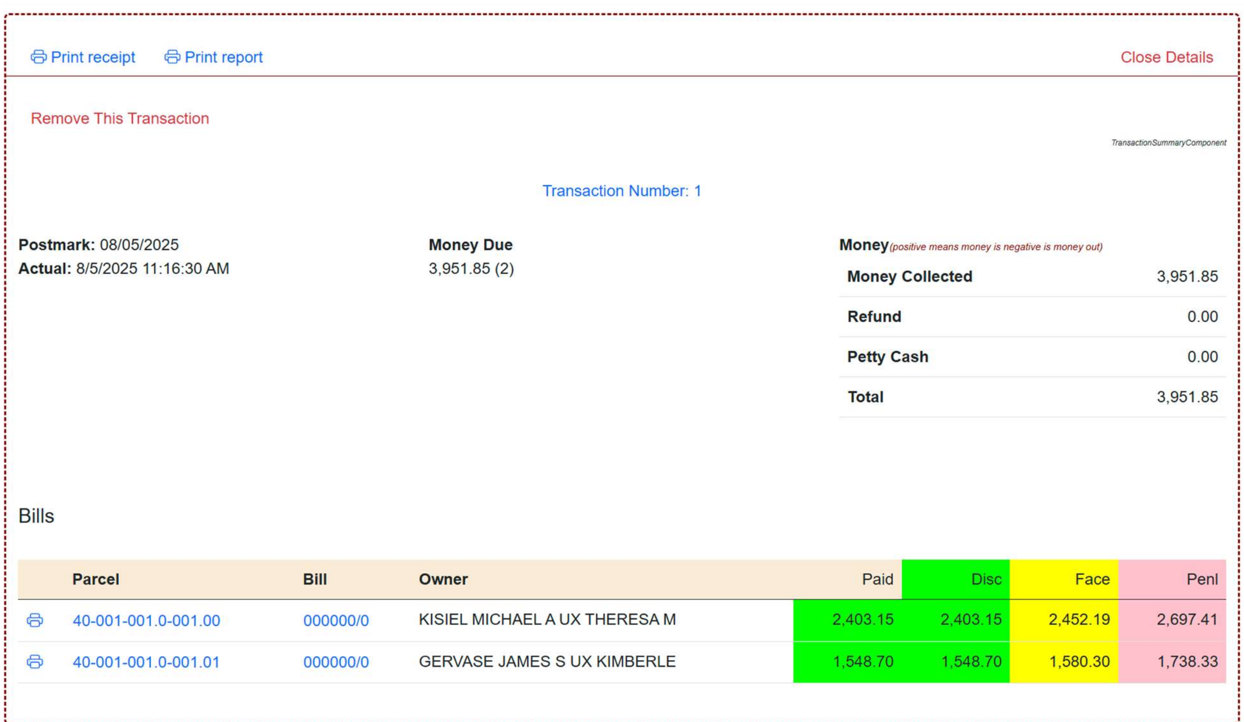
Transactions are created as a result of the Posting process in Tax Discovery. The user is displayed the last 25 transactions made within Tax Discovery. The user can navigate to previous transactions, there are back and forward buttons to allow the next/previous set of transactions to be displayed. To make a transaction, click on the Make Transaction button which will take the user to the posting page. Click on the transaction number to see the details of the transaction.

Make Transaction

Showing 0 - 25 of 1

Transaction #	$ Bill	# Bills	$ Money	$ Refund	$ P Cash	Postmark	Actual
1	3,951.85	2	3,951.85	0.00	0.00	08/05/2025	08/05/2025

In the details, the user can see the information that was entered during the posting process that details the money, bills and adjustments that constitute the transactions. From here, the collector can print a receipt or print a report about the transaction.



Print receipt Print report Close Details

Remove This Transaction

TransactionSummaryComponent

Transaction Number: 1

Postmark: 08/05/2025
Actual: 8/5/2025 11:16:30 AM

Money Due
3,951.85 (2)

Money *(positive means money is negative is money out)*

Money Collected	3,951.85
Refund	0.00
Petty Cash	0.00
Total	3,951.85

Bills

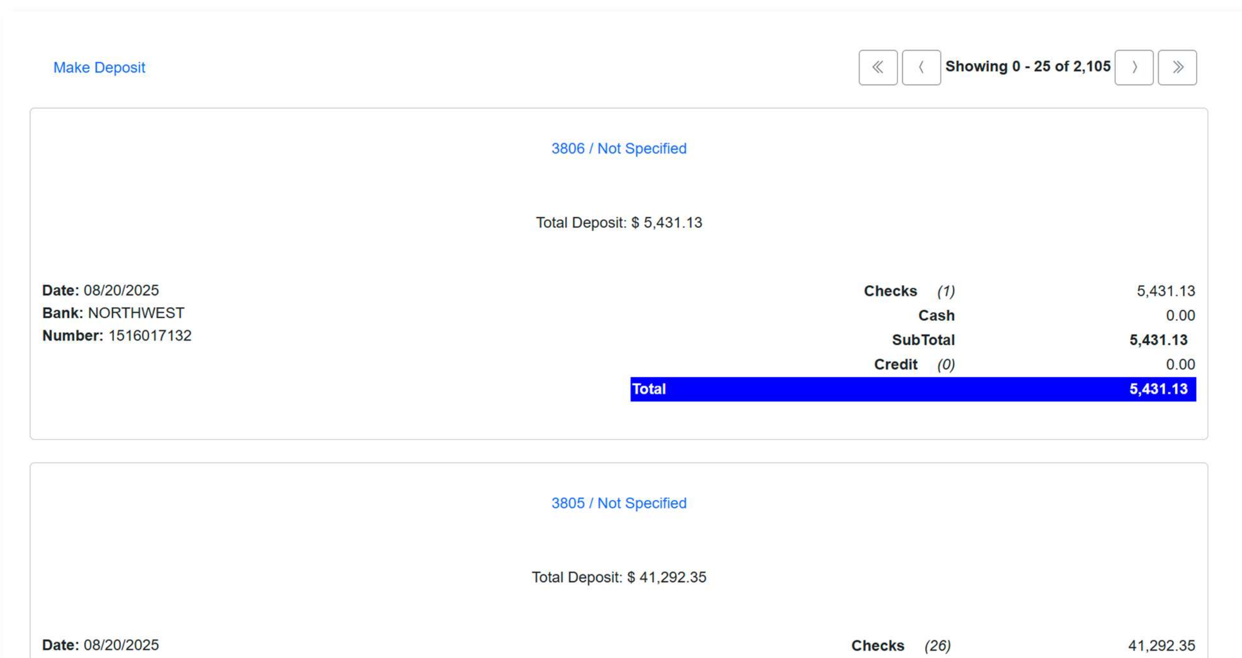
	Parcel	Bill	Owner	Paid	Disc	Face	Penl
	40-001-001.0-001.00	000000/0	KISIEL MICHAEL A UX THERESA M	2,403.15	2,403.15	2,452.19	2,697.41
	40-001-001.0-001.01	000000/0	GERVASE JAMES S UX KIMBERLE	1,548.70	1,548.70	1,580.30	1,738.33

Banking

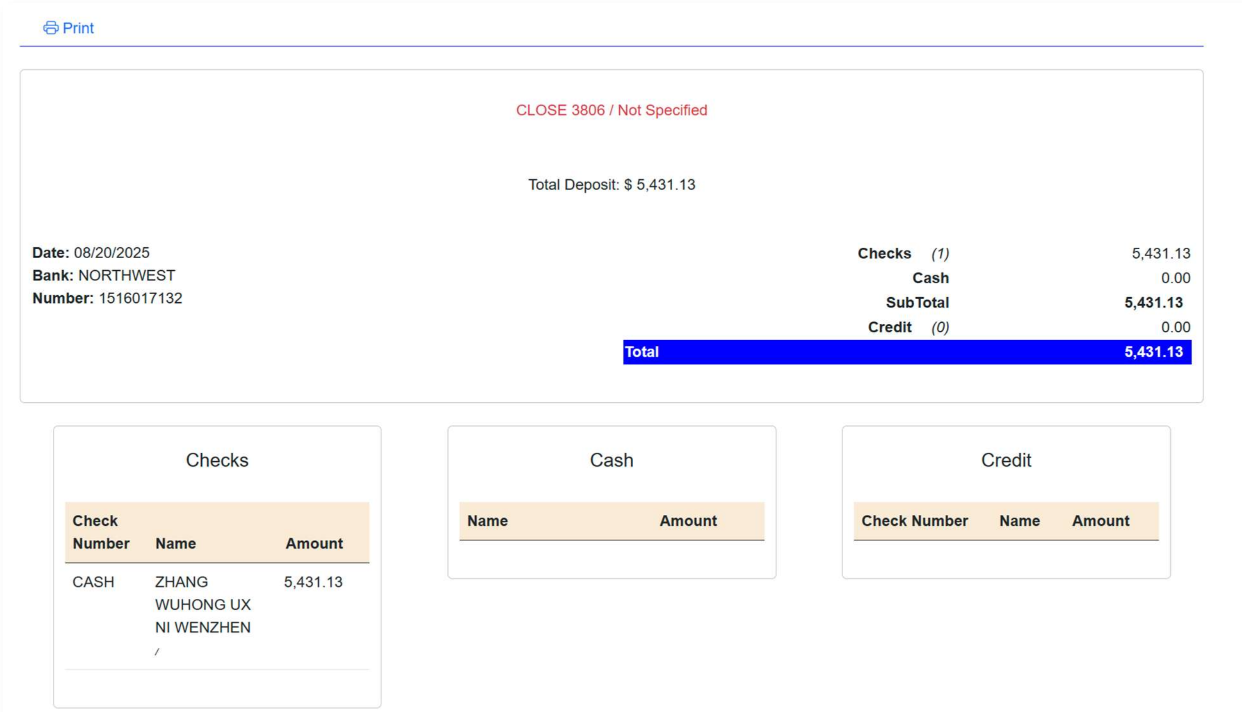
The banking section of Tax Discovery is specific to the creation of bank deposit slips of collected money. Each Deposit identification is determined by a deposit number and a deposit sub number. The Deposit number is an incremental number with each deposit made. The sub number is a user defined number of the collector's desire. Some collectors who deposit multiple times a day, use the sub number to notate "Morning", "Afternoon", etc. If nothing is entered in the sub number, the value of "Not Specified" is added automatically.

The Collector will see the 25 most recent bank deposits and the break down of Checks, Cash and Credit. It is important to note that the credit assumes that the collector has set up a credit card collection method with their bank and is an automatic deposit into the collector's account. TDOL only marks that a credit card payment was used to pay the bill(s) and it is the responsibility of the collector to maintain knowledge of the specifics and post accordingly. There is no direct link to any financial institution within TDOL.

To navigate through the deposits, the collector has back and forward buttons to see the next/previous set of 25 deposits. To see the detail of the deposit, the user clicks on the deposit number/sub number button. To create a new deposit, the collector will click the Make Deposit button.



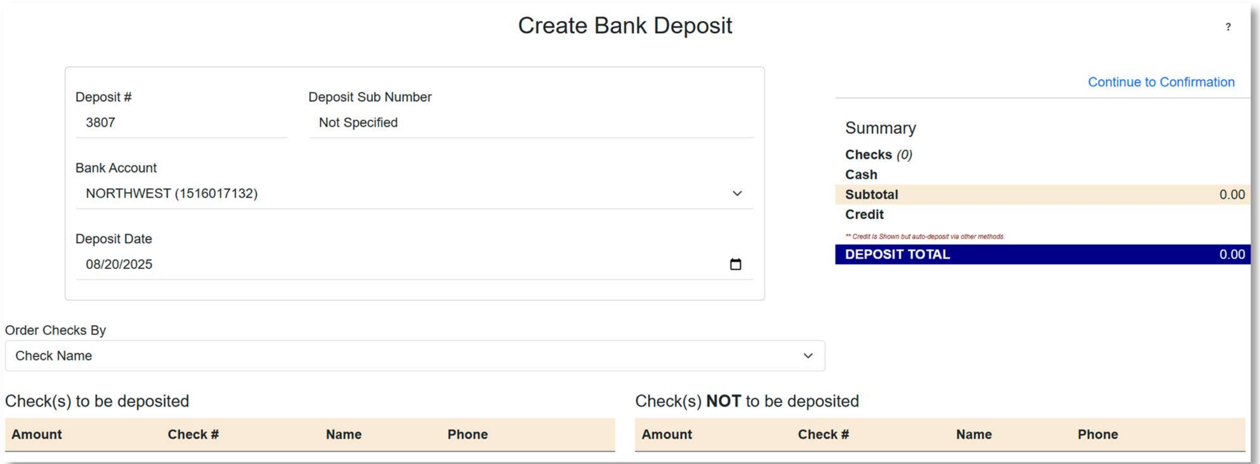
The detail of a deposit shows the Checks, Cash and Credit details that make up the deposit. In the detail section, the collector has the ability to print a copy of the deposit slip that Tax Discovery has generated.



Creating a deposit slip

Once the collector has clicked the make deposit button, the collector defines the deposit number and sub number, chooses the bank account to which the deposit is going to and the date of the deposit. The list of checks that we collected since the last deposit are ready to be deposited, however, if there is a reason that the collector wishes to hold back any checks until the next deposit, the collector simply removes them. If any check is in the NOT to be deposited that should be added, the collector simply adds them.

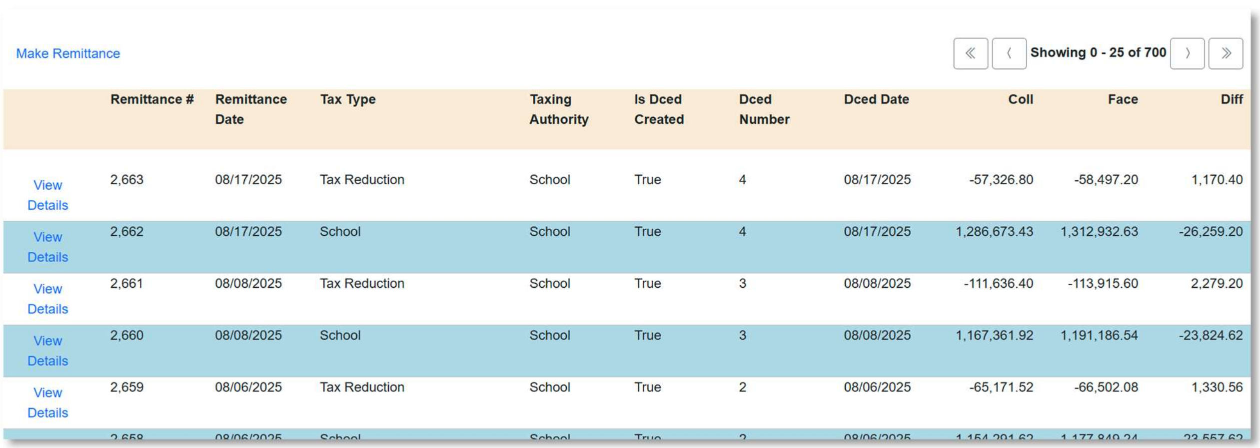
Once the collector is satisfied by the setup, click on the Continue to Confirmation button to review the information for accuracy. If accurate, click on the Make Deposit button and the deposit is logged to the system.


Create Bank Deposit
?
Deposit #
3807
Deposit Sub Number
Not Specified
Bank Account
NORTHWEST (1516017132)
Deposit Date
08/20/2025
Continue to Confirmation
Summary
Checks (0)
Cash
Subtotal 0.00
Credit
** Credit is Shown but auto-deposit via other methods.
DEPOSIT TOTAL 0.00
Order Checks By
Check Name
Check(s) to be deposited
Amount Check # Name Phone
Check(s) NOT to be deposited
Amount Check # Name Phone

Remittances

Each line item of the bills that is collected by the tax collector needs to be remitted in Tax Discovery. The remittance process is designed to allow the collector to mark specific line items of the bill that are being prepared for the DCED process. The collector is ensuring that the individual line items are collected and that the funds are available within the collector's bank account in order to write a check to the taxing authority (or transfer money if applicable).

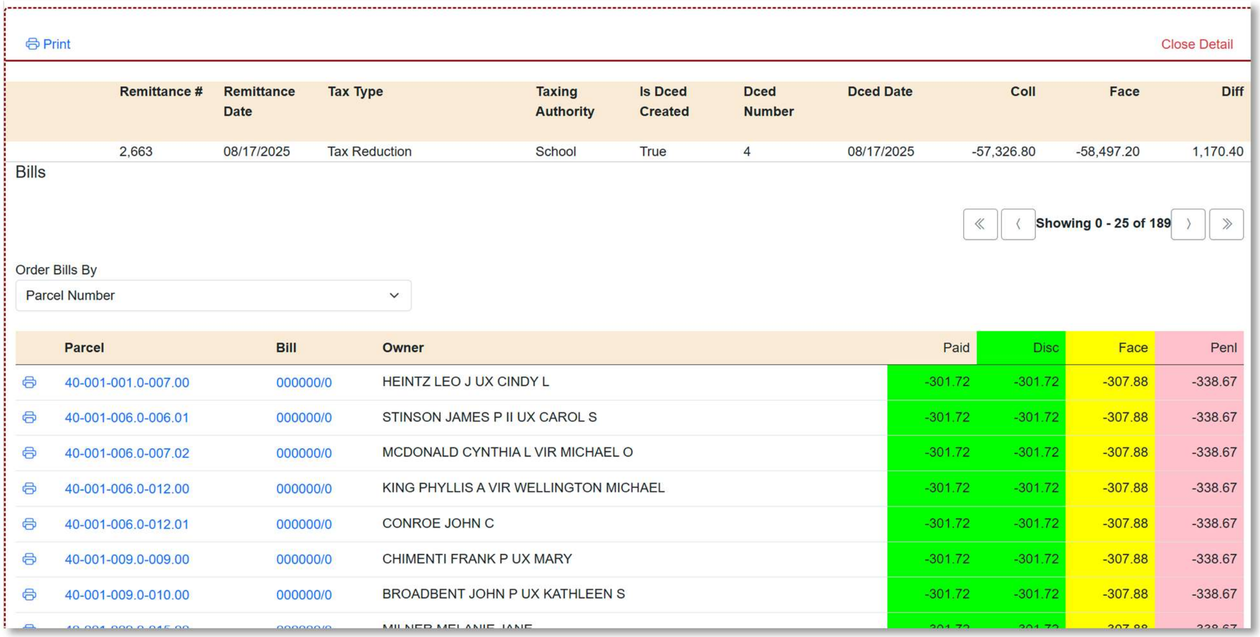
The collector is shown a list of the last 25 remittances that have been performed. The collector can navigate back and forth to show another set of 25 remittances.


Make Remittance

Showing 0 - 25 of 700

	Remittance #	Remittance Date	Tax Type	Taxing Authority	Is Dced Created	Dced Number	Dced Date	Coll	Face	Diff
View Details	2,663	08/17/2025	Tax Reduction	School	True	4	08/17/2025	-57,326.80	-58,497.20	1,170.40
View Details	2,662	08/17/2025	School	School	True	4	08/17/2025	1,286,673.43	1,312,932.63	-26,259.20
View Details	2,661	08/08/2025	Tax Reduction	School	True	3	08/08/2025	-111,636.40	-113,915.60	2,279.20
View Details	2,660	08/08/2025	School	School	True	3	08/08/2025	1,167,361.92	1,191,186.54	-23,824.62
View Details	2,659	08/06/2025	Tax Reduction	School	True	2	08/06/2025	-65,171.52	-66,502.08	1,330.56

When clicking on the View Details button, the collector is shown the summary and the bills (25 at a time) that were used within that remittance. It is important to note that the amounts are the amounts of the LINE ITEM and not the amount of the bill as a whole. The remittance process is specific to the bill's line item and not the entire bill. The user has the ability to print a remittance report for their records.



Print | Close Detail

Remittance #	Remittance Date	Tax Type	Taxing Authority	Is Dced Created	Dced Number	Dced Date	Coll	Face	Diff
2,663	08/17/2025	Tax Reduction	School	True	4	08/17/2025	-57,326.80	-58,497.20	1,170.40

Bills

Showing 0 - 25 of 189

Order Bills By

Parcel Number

Parcel	Bill	Owner	Paid	Disc	Face	Penl
40-001-001.0-007.00	000000/0	HEINTZ LEO J UX CINDY L	-301.72	-301.72	-307.88	-338.67
40-001-006.0-006.01	000000/0	STINSON JAMES P II UX CAROL S	-301.72	-301.72	-307.88	-338.67
40-001-006.0-007.02	000000/0	MCDONALD CYNTHIA L VIR MICHAEL O	-301.72	-301.72	-307.88	-338.67
40-001-006.0-012.00	000000/0	KING PHYLLIS A VIR WELLINGTON MICHAEL	-301.72	-301.72	-307.88	-338.67
40-001-006.0-012.01	000000/0	CONROE JOHN C	-301.72	-301.72	-307.88	-338.67
40-001-009.0-009.00	000000/0	CHIMENTI FRANK P UX MARY	-301.72	-301.72	-307.88	-338.67
40-001-009.0-010.00	000000/0	BROADBENT JOHN P UX KATHLEEN S	-301.72	-301.72	-307.88	-338.67

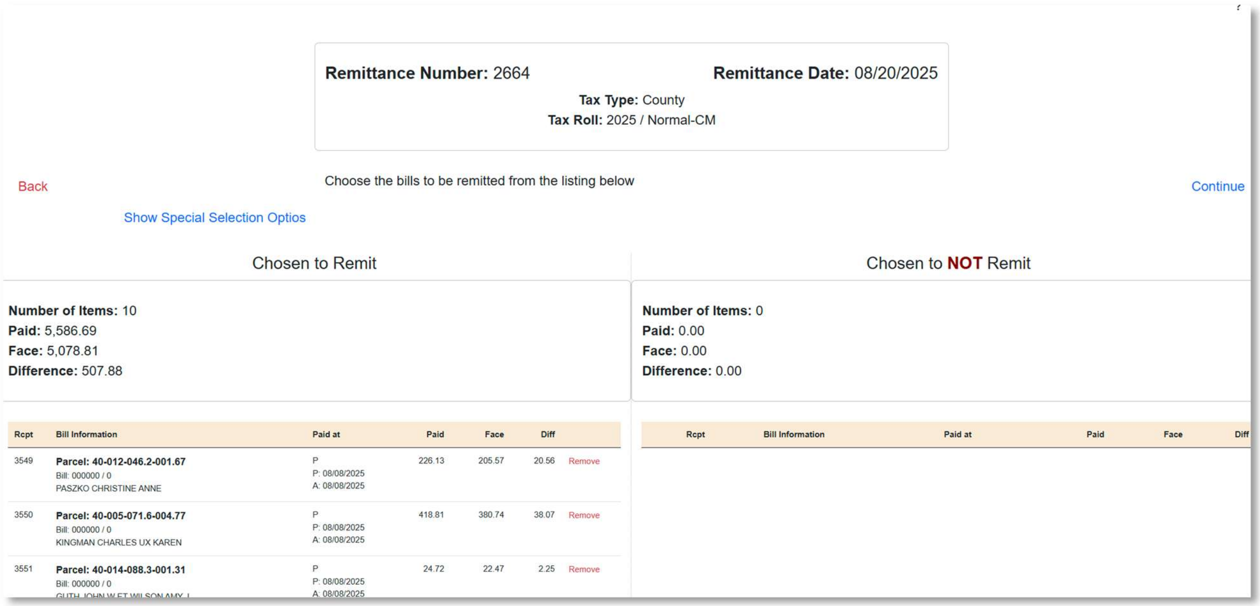
Creating a Remittance

When the collector clicks on the Make Remittance button, the first page shows a list of the line items within each tax roll that are still outstanding. Click on the appropriate button to start the remittance process for that group of line items. If there are no outstanding remittances needed, Tax Discovery will show that there is nothing to remit.

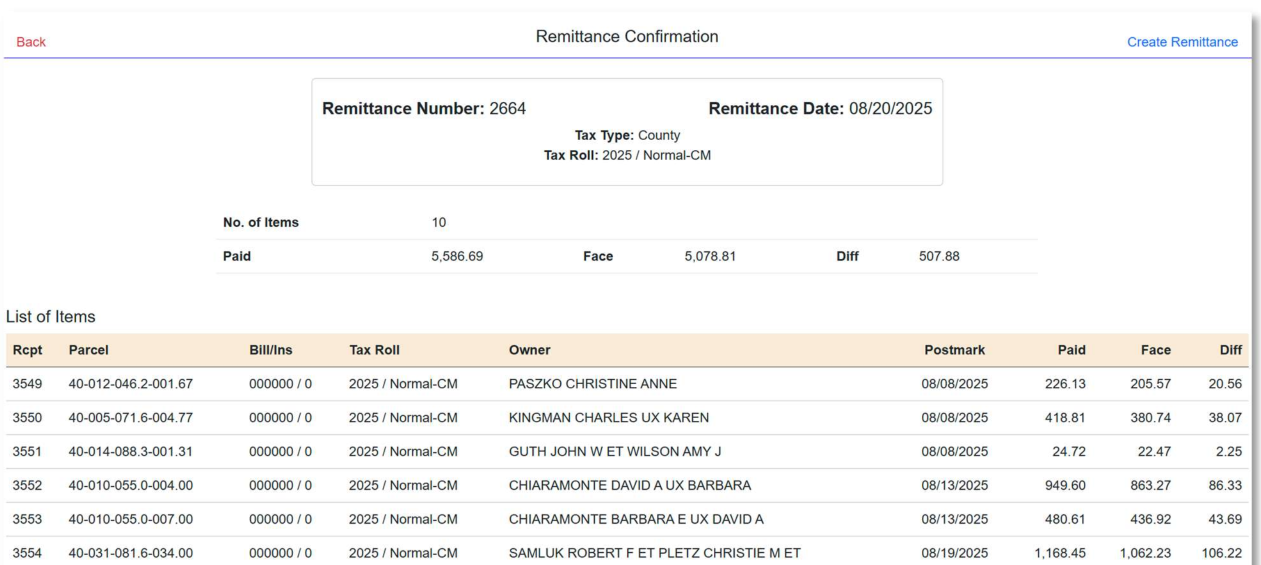
The next screen shows the remittance information and the summary of what is to be remitted. By default, all items are selected to be remitted that are needing this process. If the collector wishes to hold back any item(s), clicking the Remove button will keep that for the next remittance creation process.

Special Note: Be cautious of removing line items. Since a bill has generally more than one line item, remitting a line item of a bill without remitting all line lines could create an out of sync condition and can be confusing to the collector. In the end, it is the choice of the collector, however, it is recommended that the collector remit all line items of a bill as appropriate.

When the setup is complete, the collector clicks the continue button to go to the confirmation screen.



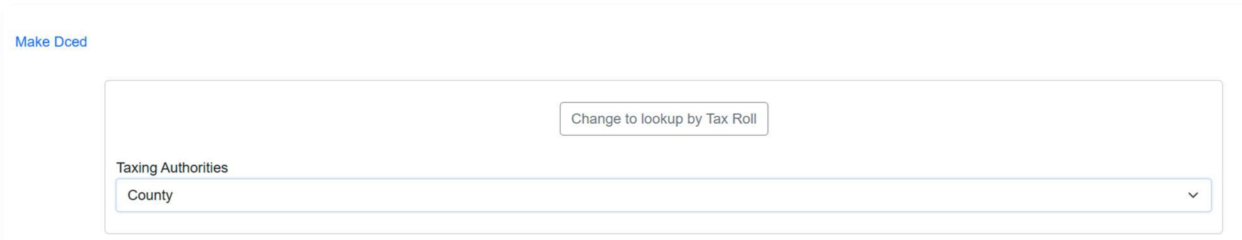
The confirmation screen shows the collector what is about to be submitted. Review the information for accuracy and if accurate, click on the Create Remittance button.



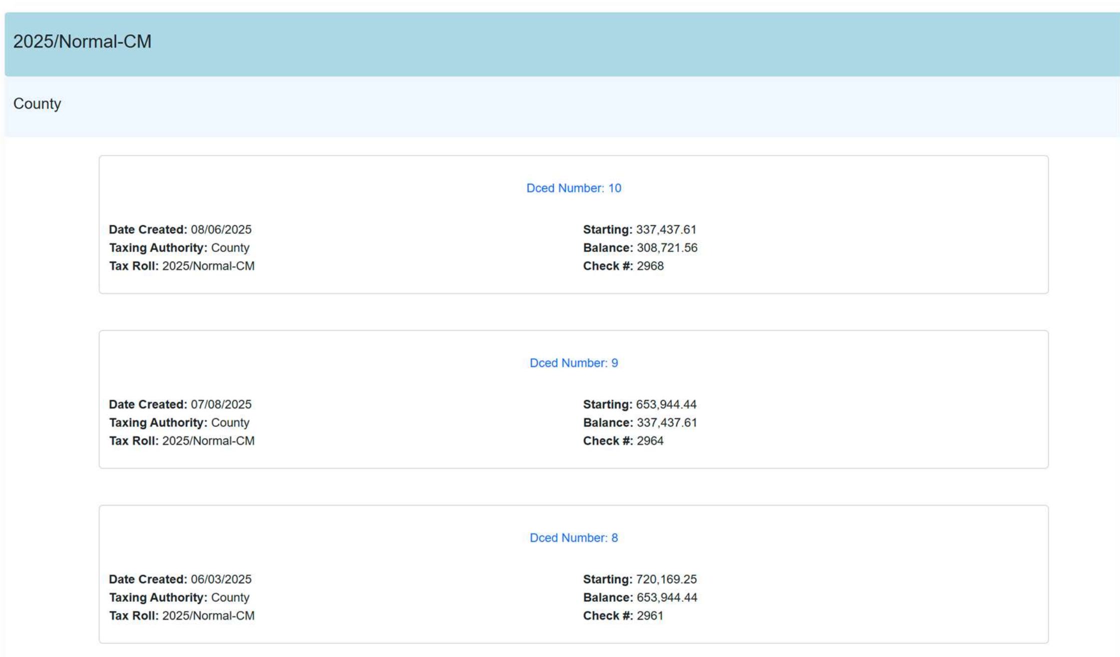
Rcpt	Parcel	Bill/Ins	Tax Roll	Owner	Postmark	Paid	Face	Diff
3549	40-012-046.2-001.67	000000 / 0	2025 / Normal-CM	PASZKO CHRISTINE ANNE	08/08/2025	226.13	205.57	20.56
3550	40-005-071.6-004.77	000000 / 0	2025 / Normal-CM	KINGMAN CHARLES UX KAREN	08/08/2025	418.81	380.74	38.07
3551	40-014-088.3-001.31	000000 / 0	2025 / Normal-CM	GUTH JOHN W ET WILSON AMY J	08/08/2025	24.72	22.47	2.25
3552	40-010-055.0-004.00	000000 / 0	2025 / Normal-CM	CHIARAMONTE DAVID A UX BARBARA	08/13/2025	949.60	863.27	86.33
3553	40-010-055.0-007.00	000000 / 0	2025 / Normal-CM	CHIARAMONTE BARBARA E UX DAVID A	08/13/2025	480.61	436.92	43.69
3554	40-031-081.6-034.00	000000 / 0	2025 / Normal-CM	SAMLUK ROBERT F ET PLETZ CHRISTIE M ET	08/19/2025	1,168.45	1,062.23	106.22

Dceds

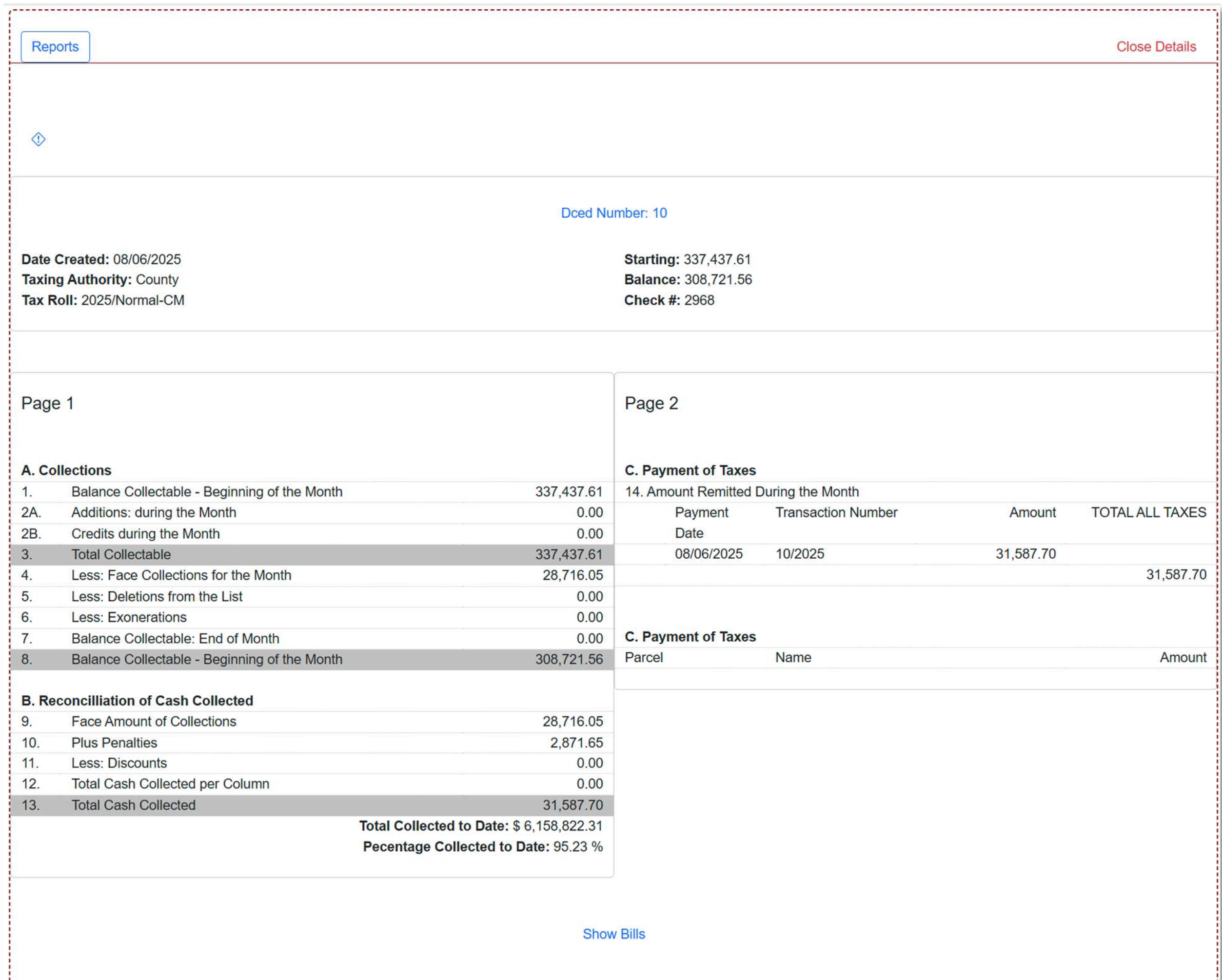
The DCED process is the mechanism that turns money over to the appropriate taxing authority. The collector that wishes to review the DCEDs that have been created in the past has two mechanisms to see the DCEDs. First, the collector can see all the DCEDs created for a Taxing Authority. By choosing the appropriate taxing authority, the list of DCEDs will be provided accordingly. The collector also has the ability to show DCEDs that were created for a tax roll, Clicking the toggle button will switch to a list of tax rolls and when the collector chooses a specific tax roll, Tax Discovery will show the DCEDs created appropriately.



To see the detail of a DCED, click on the DCED number and the details that went into the creation will be shown.



The details of the DCED that was created shows the report that went to the taxing authority. The collector has the ability to print required reports to the taxing authority from the reports button. The collector can also display the bills that made up the DCED by clicking on the Show Bills button.



Reports

Close Details

Dced Number: 10

Date Created: 08/06/2025
Taxing Authority: County
Tax Roll: 2025/Normal-CM

Starting: 337,437.61
Balance: 308,721.56
Check #: 2968

Page 1

A. Collections

1.	Balance Collectable - Beginning of the Month	337,437.61
2A.	Additions: during the Month	0.00
2B.	Credits during the Month	0.00
3.	Total Collectable	337,437.61
4.	Less: Face Collections for the Month	28,716.05
5.	Less: Deletions from the List	0.00
6.	Less: Exonerations	0.00
7.	Balance Collectable: End of Month	0.00
8.	Balance Collectable - Beginning of the Month	308,721.56

B. Reconcilliation of Cash Collected

9.	Face Amount of Collections	28,716.05
10.	Plus Penalties	2,871.65
11.	Less: Discounts	0.00
12.	Total Cash Collected per Column	0.00
13.	Total Cash Collected	31,587.70

Total Collected to Date: $ 6,158,822.31
Pecentage Collected to Date: 95.23 %

Page 2

C. Payment of Taxes

14. Amount Remitted During the Month

Payment Date	Transaction Number	Amount	TOTAL ALL TAXES
08/06/2025	10/2025	31,587.70	
			31,587.70

C. Payment of Taxes

Parcel	Name	Amount

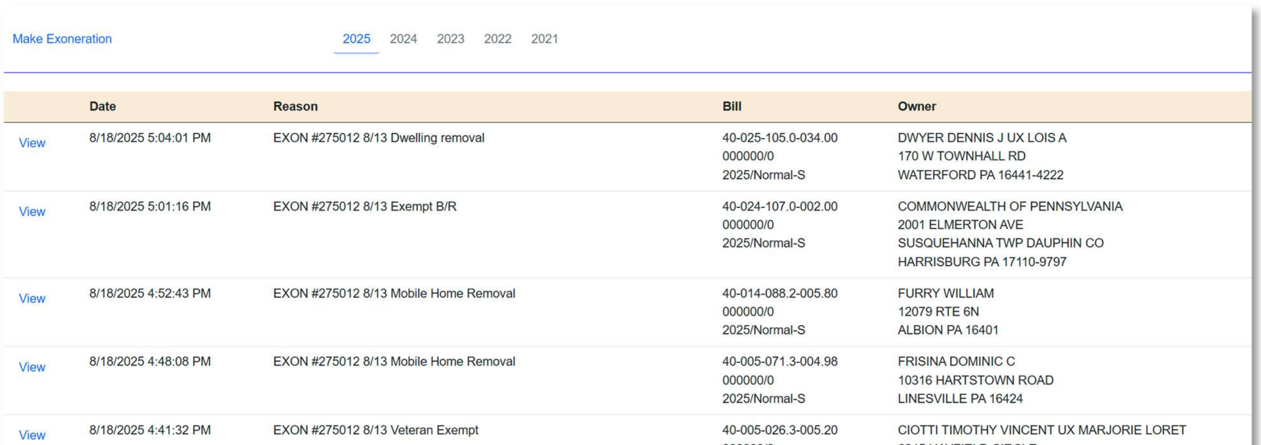
Show Bills

Creating a DCED

Exonerations

The exoneration process is when the collector has been alerted by the Taxing Authority to make a reduction on a bill that has been issued. This is sometimes due to a house demolition or trailer removal, etc. When the collector enters the exonerations page, the exonerations are group by the year in which it was done with the most recent being at the top. Tax Discovery only shows the past 5 years of exonerations, however, the data is always retained within the system. To go further back than 5 years, contact support for assistance.

To change years, the collector just clicks on the year appropriate to see the exonerations done in that year.



Make Exoneration   2025 2024 2023 2022 2021

	Date	Reason	Bill	Owner
View	8/18/2025 5:04:01 PM	EXON #275012 8/13 Dwelling removal	40-025-105.0-034.00 000000/0 2025/Normal-S	DWYER DENNIS J UX LOIS A 170 W TOWNHALL RD WATERFORD PA 16441-4222
View	8/18/2025 5:01:16 PM	EXON #275012 8/13 Exempt B/R	40-024-107.0-002.00 000000/0 2025/Normal-S	COMMONWEALTH OF PENNSYLVANIA 2001 ELMERTON AVE SUSQUEHANNA TWP DAUPHIN CO HARRISBURG PA 17110-9797
View	8/18/2025 4:52:43 PM	EXON #275012 8/13 Mobile Home Removal	40-014-088.2-005.80 000000/0 2025/Normal-S	FURRY WILLIAM 12079 RTE 6N ALBION PA 16401
View	8/18/2025 4:48:08 PM	EXON #275012 8/13 Mobile Home Removal	40-005-071.3-004.98 000000/0 2025/Normal-S	FRISINA DOMINIC C 10316 HARTSTOWN ROAD LINESVILLE PA 16424
View	8/18/2025 4:41:32 PM	EXON #275012 8/13 Veteran Exempt	40-005-026.3-005.20	CIOTTI TIMOTHY VINCENT UX MARJORIE LORET

Clicking on the View button will obtain the exoneration details showing the collector what the bill was (original) and what it became (current). To print a report, click on the print button.

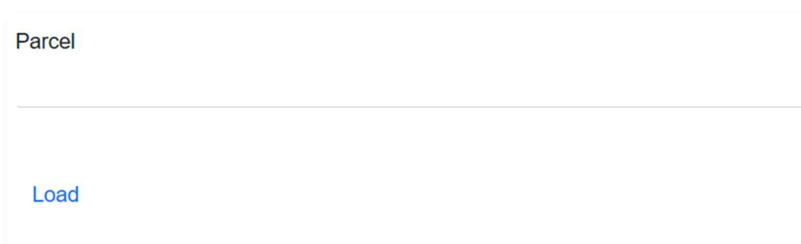
If this exoneration has errors and is still unpaid, the collector can undo the exoneration and return the bill back to its original state. To perform this, click on the REMOVE THIS EXONERATION button.

Creating an exoneration

When creating an exoneration, the following conditions must be met:

1. The bill must be unpaid
2. The bill must belong to an active tax roll
3. The bill must have money due

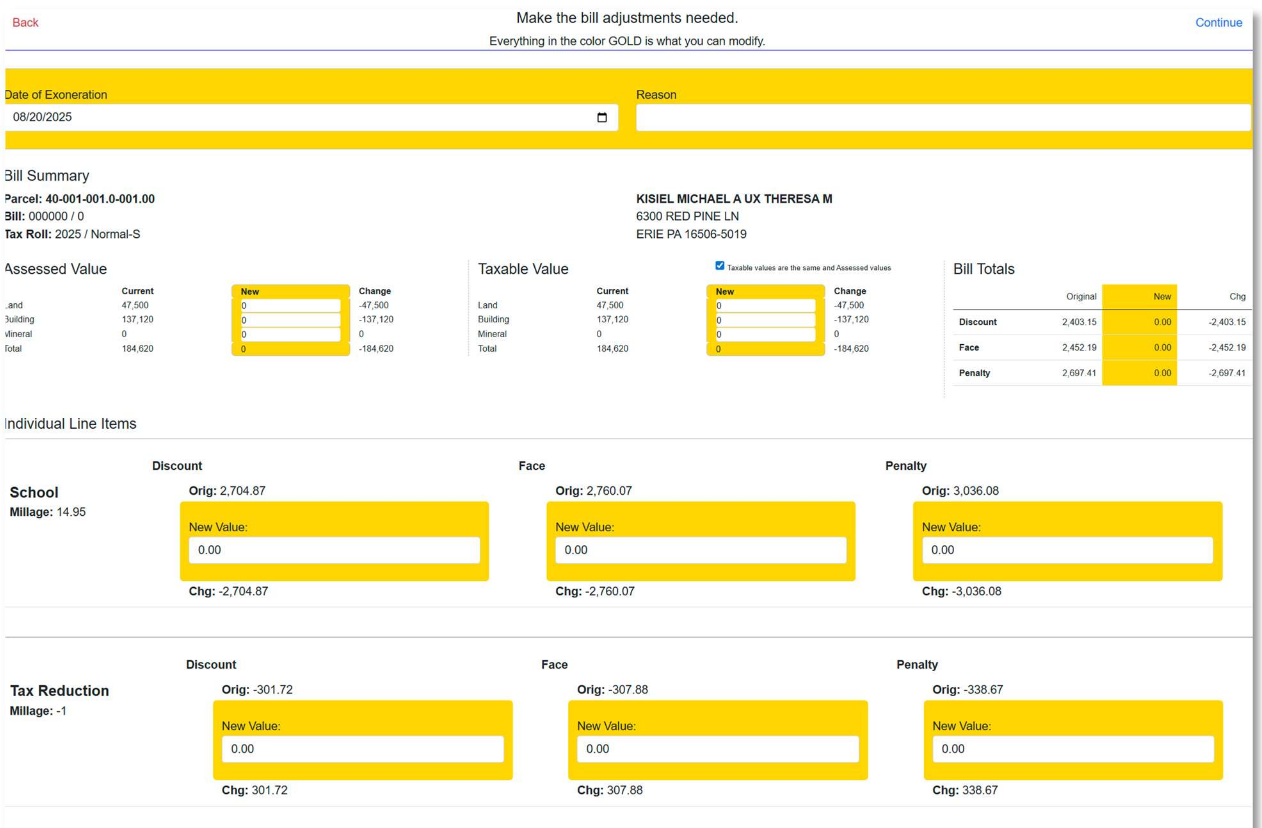
If the three conditions are met, the first step is to load the bill(s) for a parcel that meet these conditions. Enter the parcel number and click the load button



The bills that meet the three conditions are displayed, click the Select button to choose the appropriate bill to be exonerated.

	Bill Detail	Owner
SELECT	**40-001-001.0-001.00** 000000/0 2025/Normal-S	**KISIEL MICHAEL A UX THERESA M** 6300 RED PINE LN ERIE PA 16506-5019

In the next form, complete the information in the white areas that are bordered in gold. Tax Discovery will summarize the information into the total bill and calculate the information as needed. Once the information is complete, click the continue button to advance to the confirmation screen



Back

Make the bill adjustments needed.

Everything in the color GOLD is what you can modify.

Continue

Date of Exoneration: 08/20/2025

Reason:

Bill Summary

Parcel: 40-001-001.0-001.00

Bill: 000000 / 0

Tax Roll: 2025 / Normal-S

KISIEL MICHAEL A UX THERESA M

6300 RED PINE LN

ERIE PA 16506-5019

Assessed Value

	Current	New	Change
Land	47,500	0	-47,500
Building	137,120	0	-137,120
Mineral	0	0	0
Total	184,620	0	-184,620

Taxable Value

Taxable values are the same and Assessed values

	Current	New	Change
Land	47,500	0	-47,500
Building	137,120	0	-137,120
Mineral	0	0	0
Total	184,620	0	-184,620

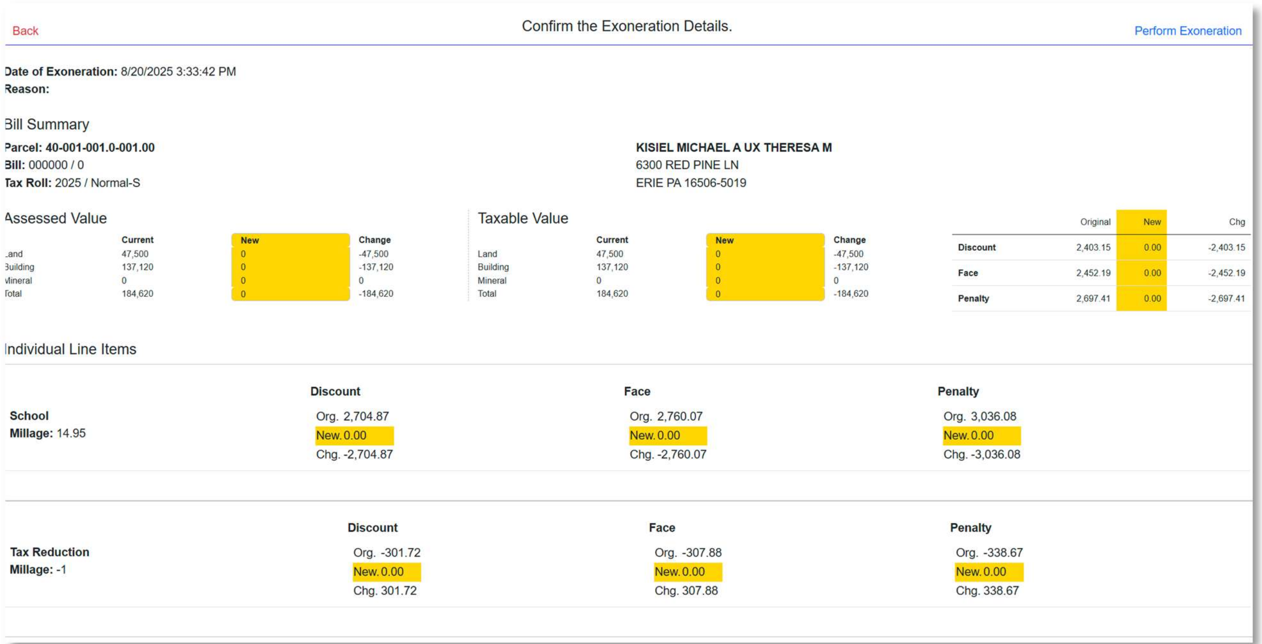
Bill Totals

	Original	New	Chg
Discount	2,403.15	0.00	-2,403.15
Face	2,452.19	0.00	-2,452.19
Penalty	2,697.41	0.00	-2,697.41

Individual Line Items

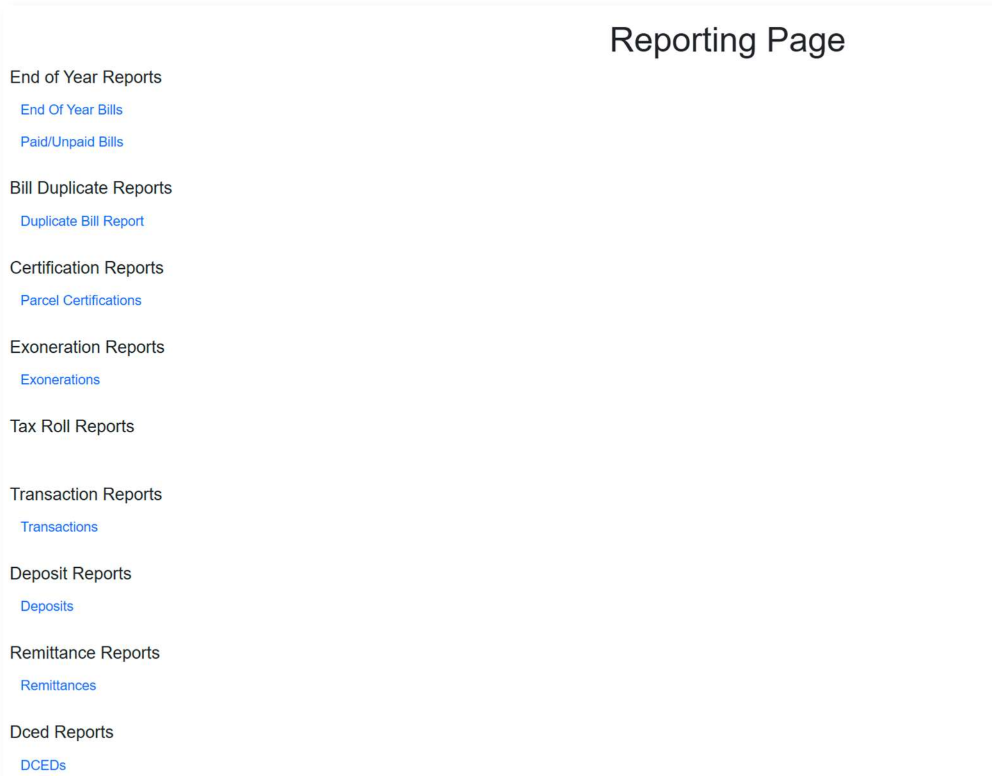
	Discount	Face	Penalty
School **Millage:** 14.95	**Orig:** 2,704.87 New Value: 0.00 **Chg:** -2,704.87	**Orig:** 2,760.07 New Value: 0.00 **Chg:** -2,760.07	**Orig:** 3,036.08 New Value: 0.00 **Chg:** -3,036.08
Tax Reduction **Millage:** -1	**Orig:** -301.72 New Value: 0.00 **Chg:** 301.72	**Orig:** -307.88 New Value: 0.00 **Chg:** 307.88	**Orig:** -338.67 New Value: 0.00 **Chg:** 338.67

The collector verifies the information ensure it is accurate. If acceptable, click the Perform Exoneration button to complete the process.


Back
Confirm the Exoneration Details.
Perform Exoneration
Date of Exoneration: 8/20/2025 3:33:42 PM
Reason:
Bill Summary
Parcel: 40-001-001.0-001.00
Bill: 000000 / 0
Tax Roll: 2025 / Normal-S
KISIEL MICHAEL A UX THERESA M
6300 RED PINE LN
ERIE PA 16506-5019
Assessed Value
Current New Change
Land 47,500 0 -47,500
Building 137,120 0 -137,120
Mineral 0 0 0
Total 184,620 0 -184,620
Taxable Value
Current New Change
Land 47,500 0 -47,500
Building 137,120 0 -137,120
Mineral 0 0 0
Total 184,620 0 -184,620
Original New Chg
Discount 2,403.15 0.00 -2,403.15
Face 2,452.19 0.00 -2,452.19
Penalty 2,697.41 0.00 -2,697.41
Individual Line Items
School
Millage: 14.95
Discount
Org. 2,704.87
New. 0.00
Chg. -2,704.87
Face
Org. 2,760.07
New. 0.00
Chg. -2,760.07
Penalty
Org. 3,036.08
New. 0.00
Chg. -3,036.08
Tax Reduction
Millage: -1
Discount
Org. -301.72
New. 0.00
Chg. 301.72
Face
Org. -307.88
New. 0.00
Chg. 307.88
Penalty
Org. -338.67
New. 0.00
Chg. 338.67

Reporting Page

The reports page in Tax Discovery is where the collector can get links to various reporting mechanisms throughout the application. Some reports will need additional information and those will be detailed as needed and some report links will take the collector to the appropriate area to obtain the desired report.

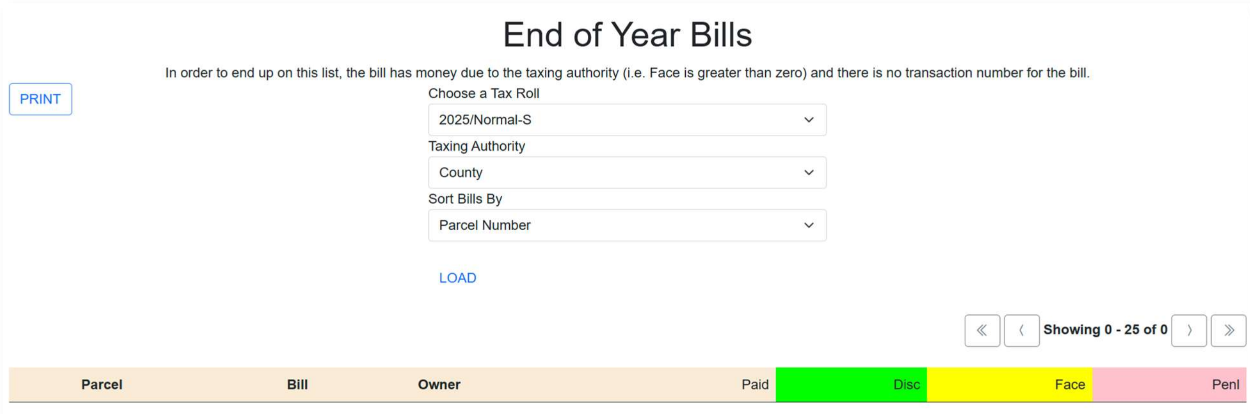


End of Year Bills

This is a specialized report to be produced at year end closing with the taxing authority. It is specifically the list of bills within the tax roll that are either not paid or NSF.

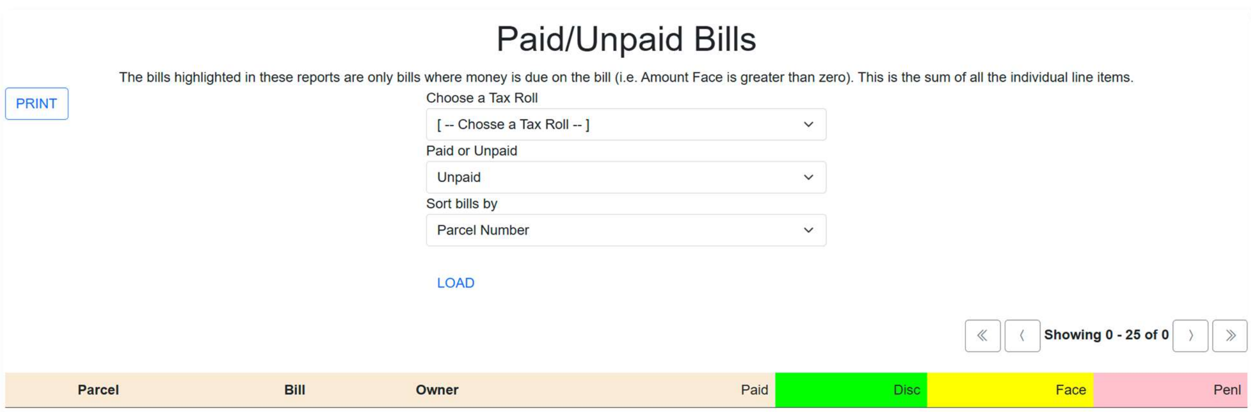
Provide the Tax Roll, Taxing Authority and how to sort the bills. Click the load button to display the bill on the screen. Click the print button to produce the information in a printable report.

Special note: *The amounts in the report IS NOT necessary the total of the bill. It is the amount for the taxing authority. Some tax rolls have more than one taxing authority on the bill and the amounts are set for the taxing authority based on the line items.*



Paid / Unpaid Bills

These reports are designed as a list for the collector of bills either paid or unpaid. Provide the Tax Roll, paid or unpaid and the sorting of the report. Click the Load button to display the bills. Click the Print button to produce the information in a printable report.



Parcel Certifications

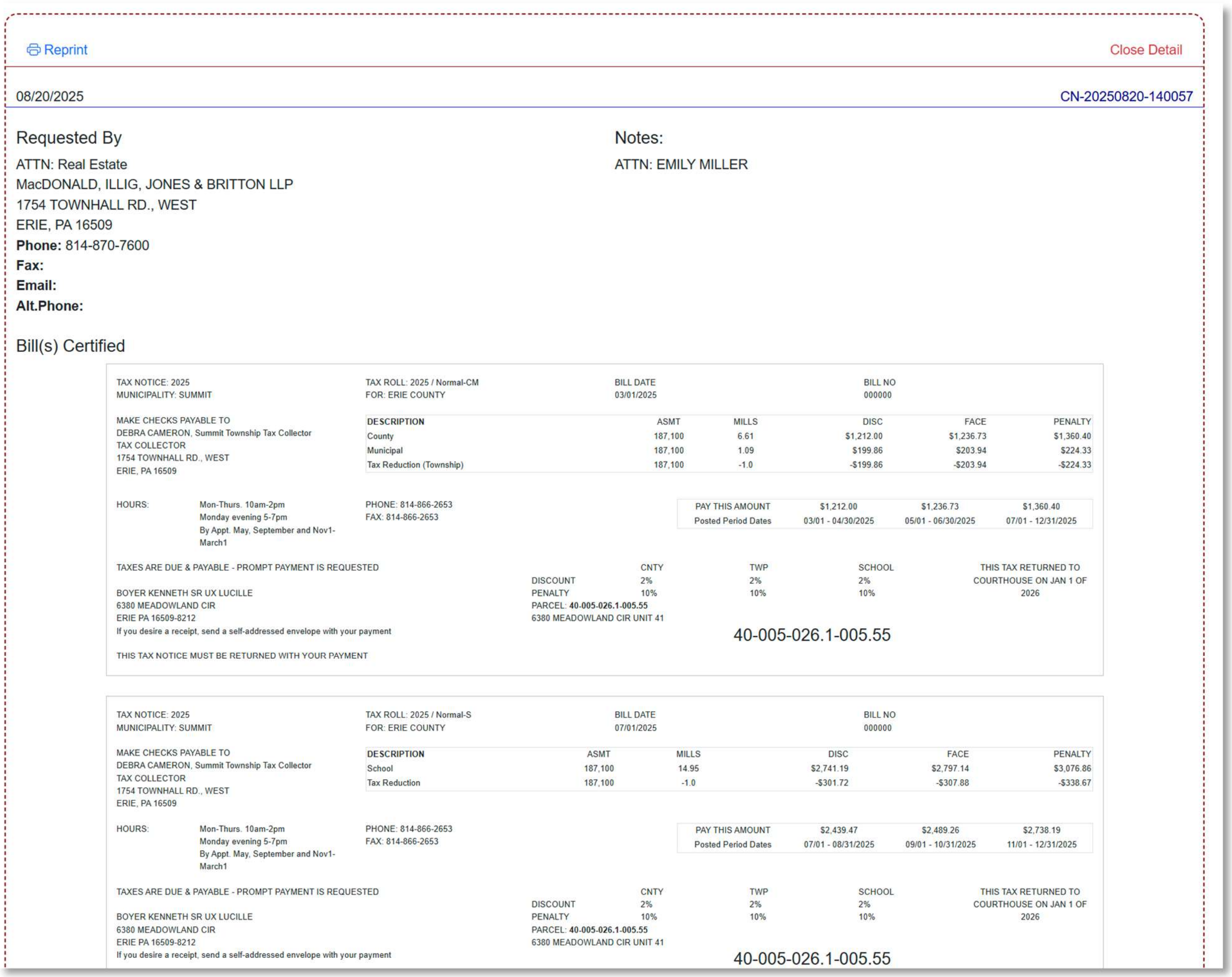
Many times, a collector is requested to certify the status of parcels as to if the taxes were paid or not. This process is called Parcel Certification. When the collector enters this page, the list of the last 25 certifications are displayed. To display the details of the certification, click on the SHOW DETAILS button.

Parcel Certifications

New Certification

	Date	Certification No.	Requested By
Show Details	8/20/2025 2:00:58 PM	CN-20250820-140057	ATTN: Real Estate
Show Details	8/20/2025 1:58:05 PM	CN-20250820-135804	ATTN: Real Estate
Show Details	8/19/2025 10:15:17 AM	CN-20250819-101517	ATTN: Real Estate
Show Details	8/19/2025 10:04:37 AM	CN-20250819-100435	Chicago Title Agency of North Central Ohio, Inc.
Show Details	8/18/2025 6:38:25 PM	CN-20250818-183824	
Show Details	8/14/2025 12:44:01 PM	CN-20250814-124401	Carney & Good
Show Details	8/14/2025 12:38:32 PM	CN-20250814-123829	ATTN: Real Estate

The details show the bill(s) that were certified for the parcel at the time of the certification. Note, this may not be accurate because a bills could have been paid after the certification. These are the details at the time the certification was performed. The information showed who requested the certification, the date & time of the certification, and the CN (Certification Number) for that certification. To print the certification, click the PRINT button.



Reprint | Close Detail

08/20/2025 | CN-20250820-140057

Requested By

ATTN: Real Estate
MacDONALD, ILLIG, JONES & BRITTON LLP
1754 TOWNHALL RD., WEST
ERIE, PA 16509
Phone: 814-870-7600
Fax:
Email:
Alt.Phone:

Notes:

ATTN: EMILY MILLER

Bill(s) Certified

TAX NOTICE: 2025
MUNICIPALITY: SUMMIT

TAX ROLL: 2025 / Normal-CM
FOR: ERIE COUNTY

BILL DATE
03/01/2025

BILL NO
000000

MAKE CHECKS PAYABLE TO
DEBRA CAMERON, Summit Township Tax Collector
TAX COLLECTOR
1754 TOWNHALL RD., WEST
ERIE, PA 16509

DESCRIPTION	ASMT	MILLS	DISC	FACE	PENALTY
County	187,100	6.61	$1,212.00	$1,236.73	$1,360.40
Municipal	187,100	1.09	$199.86	$203.94	$224.33
Tax Reduction (Township)	187,100	-1.0	-$199.86	-$203.94	-$224.33

HOURS: Mon-Thurs. 10am-2pm
Monday evening 5-7pm
By Appt. May, September and Nov1-March1

PHONE: 814-866-2653
FAX: 814-866-2653

PAY THIS AMOUNT	$1,212.00	$1,236.73	$1,360.40
Posted Period Dates	03/01 - 04/30/2025	05/01 - 06/30/2025	07/01 - 12/31/2025

TAXES ARE DUE & PAYABLE - PROMPT PAYMENT IS REQUESTED

	CNTY	TWP	SCHOOL
DISCOUNT	2%	2%	2%
PENALTY	10%	10%	10%

THIS TAX RETURNED TO COURTHOUSE ON JAN 1 OF 2026

BOYER KENNETH SR UX LUCILLE
6380 MEADOWLAND CIR
ERIE PA 16509-8212
If you desire a receipt, send a self-addressed envelope with your payment

PARCEL: **40-005-026.1-005.55**
6380 MEADOWLAND CIR UNIT 41

40-005-026.1-005.55

THIS TAX NOTICE MUST BE RETURNED WITH YOUR PAYMENT

TAX NOTICE: 2025
MUNICIPALITY: SUMMIT

TAX ROLL: 2025 / Normal-S
FOR: ERIE COUNTY

BILL DATE
07/01/2025

BILL NO
000000

MAKE CHECKS PAYABLE TO
DEBRA CAMERON, Summit Township Tax Collector
TAX COLLECTOR
1754 TOWNHALL RD., WEST
ERIE, PA 16509

DESCRIPTION	ASMT	MILLS	DISC	FACE	PENALTY
School	187,100	14.95	$2,741.19	$2,797.14	$3,076.86
Tax Reduction	187,100	-1.0	-$301.72	-$307.88	-$338.67

HOURS: Mon-Thurs. 10am-2pm
Monday evening 5-7pm
By Appt. May, September and Nov1-March1

PHONE: 814-866-2653
FAX: 814-866-2653

PAY THIS AMOUNT	$2,439.47	$2,489.26	$2,738.19
Posted Period Dates	07/01 - 08/31/2025	09/01 - 10/31/2025	11/01 - 12/31/2025

TAXES ARE DUE & PAYABLE - PROMPT PAYMENT IS REQUESTED

	CNTY	TWP	SCHOOL
DISCOUNT	2%	2%	2%
PENALTY	10%	10%	10%

THIS TAX RETURNED TO COURTHOUSE ON JAN 1 OF 2026

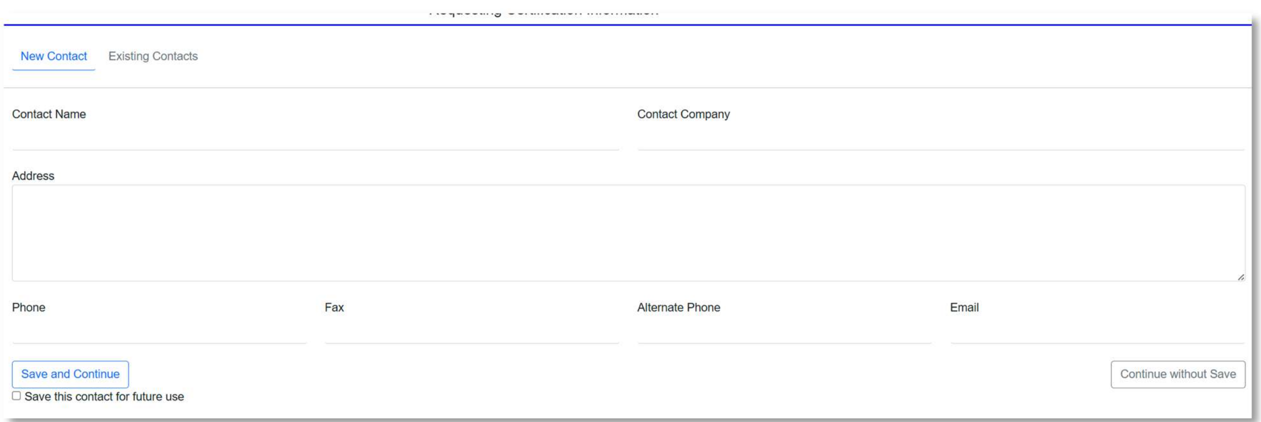
BOYER KENNETH SR UX LUCILLE
6380 MEADOWLAND CIR
ERIE PA 16509-8212
If you desire a receipt, send a self-addressed envelope with your payment

PARCEL: **40-005-026.1-005.55**
6380 MEADOWLAND CIR UNIT 41

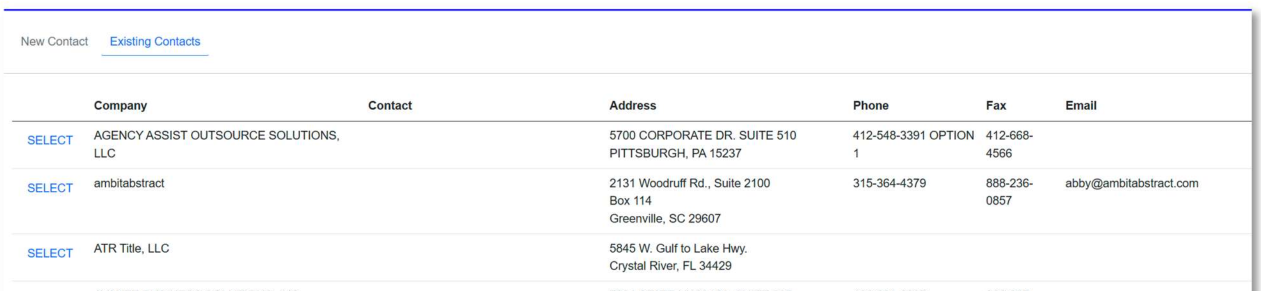
40-005-026.1-005.55

Perform a Certification

Once the collector clicks on the NEW CERTIFICATION button, the first piece of information is who is requesting the certification. The collector has two options. First, manually enter the information in the form provided. Once Complete, the collector can continue and save this information for later use or if the collector does not wish to save the information, the can click on the Continue without save.

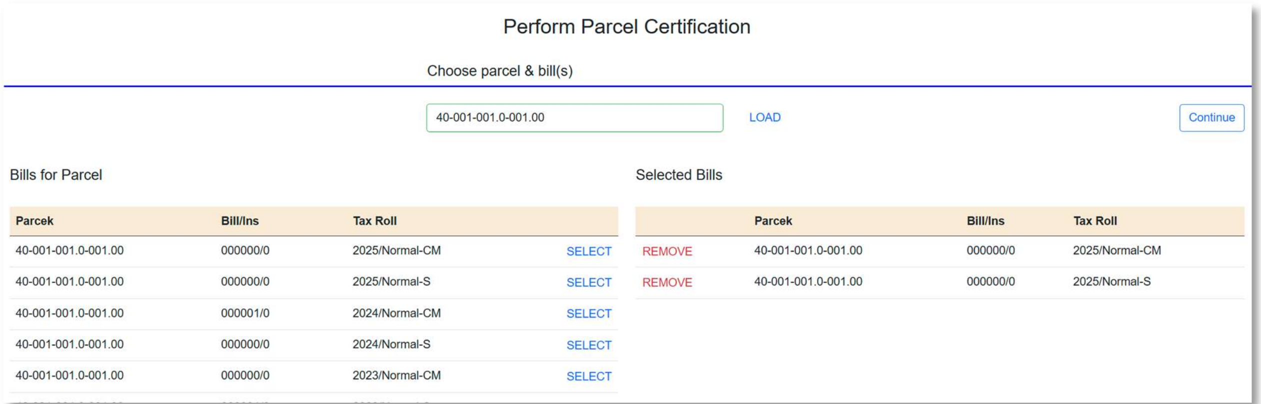


The second option is using an existing contact. By clicking the Existing Contact button, the collector is shown all the saved requestors of certifications and clicking on the SELECT button for the appropriate individual making the request.

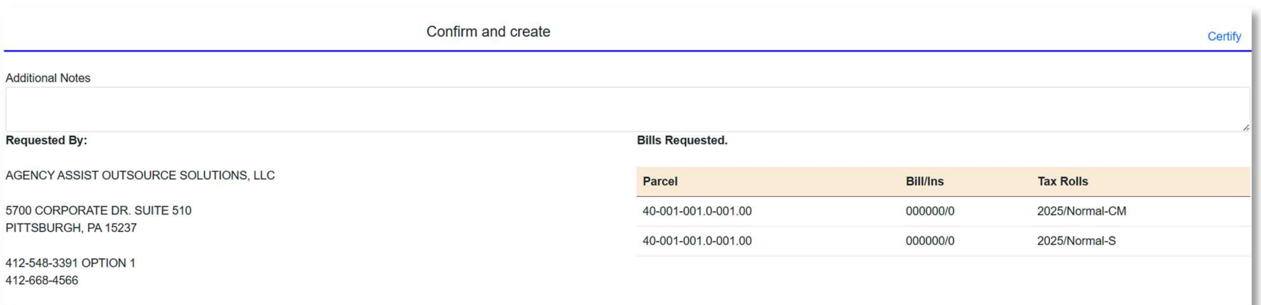


Next, the collector must enter the Parcel number and click the LOAD button to show all the bills for that parcel.

With the list of all the bills shown, click the SELECT button to the bill(s) that are to be certified. If a bill is added in error, click the remove button to unselect the bill.



Finally, the information is displayed to the tax collector, if the information is accurate, click the certify button and the collector will be taken back to the list of certifications where the most recent is at the top to print the report.



Certification Contacts

During the Certification Process, the tax collector was able to add a contact for future use. The collector has the ability to maintain that list.

When the user first enters the page, the list of contacts is presented. From there, the collector can add a contact, view a contact by clicking on the view button to the left of the contact, edit the contact with the pencil on the right, or delete the contact with the trash can on the right.


Add New Contact

	Name	Company	Phone/Fax	Addess	
View	Brown, Jerry	Company	8888888 / 9999999	address	

The for is show with the information for the contact and a button to perform the specific action that was desired from the collector.


Contact Name

Contact Company

Contact Phone

Contact Fax

Alternate Phone

Email

Address

Add Cancel

Remove Installments

There are occasions where a collector converts a bill to installments accidentally and need to return that bill back to full payment. The collector has this ability ONLY if the installments are all unpaid and within a active/certified tax roll.

When the user opens the page, Tax Discovery obtains a list of the qualified bills that can be unconverted. And displays them to the user.

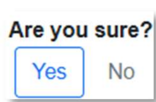
The collector then clicks on the Show Details button of the bill that is to be unconverted. The details shows each installment and the amounts and summarizes them to the final full payment bill. Review and click the remove installments button.

Installment	Discount	Face	Penalty
1	n/a	1,132.14	1,245.36
2	n/a	1,132.14	1,245.36
3	n/a	1,132.15	1,245.35
Total	3,328.50 *	3,396.43	3,736.07

** = total Discount is a calculated field.*

Remove Installments

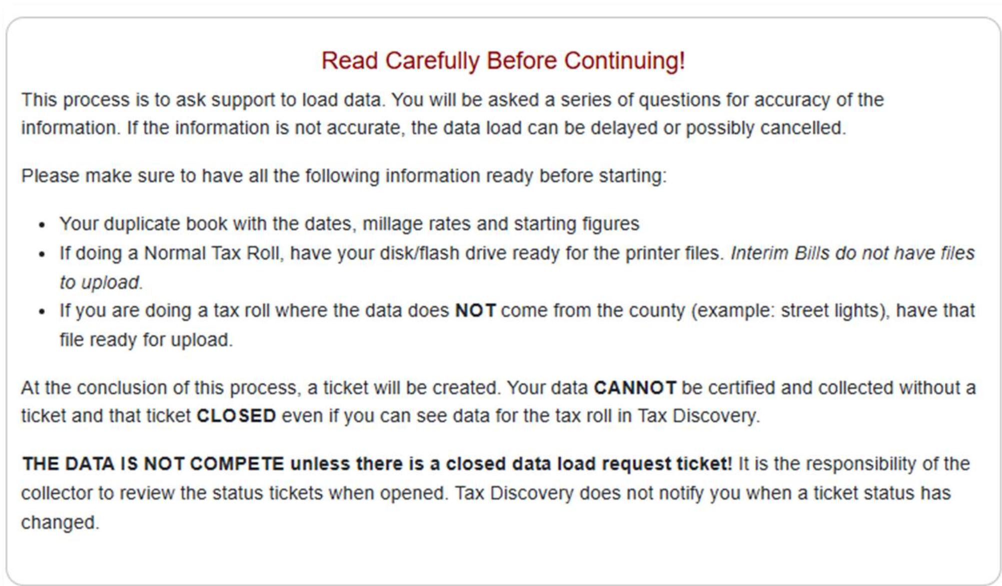
Click Yes to confirm or No to cancel.



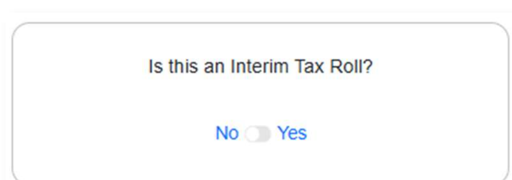
Request Data Load

Tax Discovery support will load data into the system for the collector based upon known files and files that are sent to the tax collector. In order for support to complete the process, the request form needs to be completed. There is information that Tax Discovery needs that is not in the data files as well as information that is needed to confirm that the data has been loaded successfully.

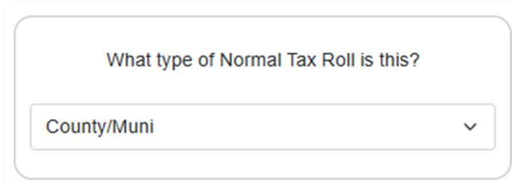
Step 1 – Introduction Page. This gives the tax collector a list of items that are needed for the completion of the request. Make sure to have this information on hand before starting the request. Click the continue button to proceed.



Step 2 – Determine if Interim Bills or not. This process tell the request system what kind of bills are to be loaded. Interim bills are not a full parcel tax roll. If the information is correct, click the continue button. Otherwise click the back button to make appropriate corrections.



Step 3 – If it is a full tax roll (i.e. the tax collector specified the request was not an interim tax roll in the previous step), the system needs to know if the load is County/Muni bills, School or Other. Other is reserved for when the tax collector is provided a different file from a municipality that is not sent through the county. For example, Street Lights that are not on the county/muni bills. If the information is correct, click the continue button. Otherwise click the back button to make appropriate corrections.

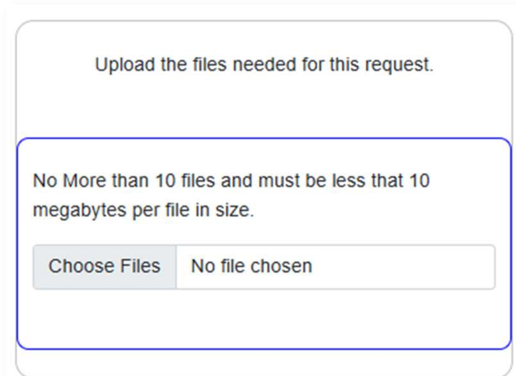


Step 4 – Determine Installments – If there are installments, tell the request how many installments there are. If there are no installments, leave the option as zero. If the information is correct, click the continue button. Otherwise click the back button to make appropriate corrections.

Step 5 – Provide the discount, face and penalty start and end dates for installment zero. If there are installments, provide the due date for each installment. If the information is correct, click the continue button. Otherwise click the back button to make appropriate corrections.

Step 6 – Indicate the Line items that will potentially be on the bills by switching to include the line item. When the collector includes each item, the millage rate and starting figure (the total at face for that line item) must be provided. Special Note: Tax Reductions do not have a millage and the starting figure is a negative number. Include a millage of "-1" and the reduction face total as a negative number. If the information is correct, click the continue button. Otherwise click the back button to make appropriate corrections.

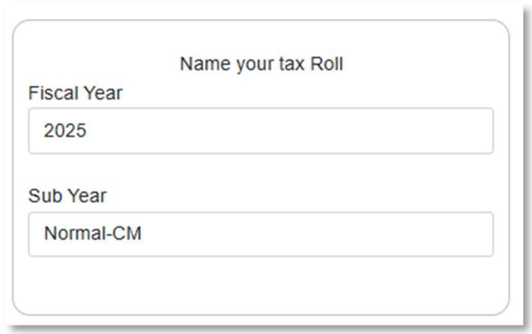
Step 7 – Upload files. In the case of non interim tax rolls, there are files that are given to a tax collector. Tax Discovery will need these files uploaded. DO NOT SKIP THIS STEP! If the files needed are not provided, the request will not be able to be completed and the ticket will be delayed or outright close as incomplete information. If the information is correct, click the continue button. Otherwise click the back button to make appropriate corrections.



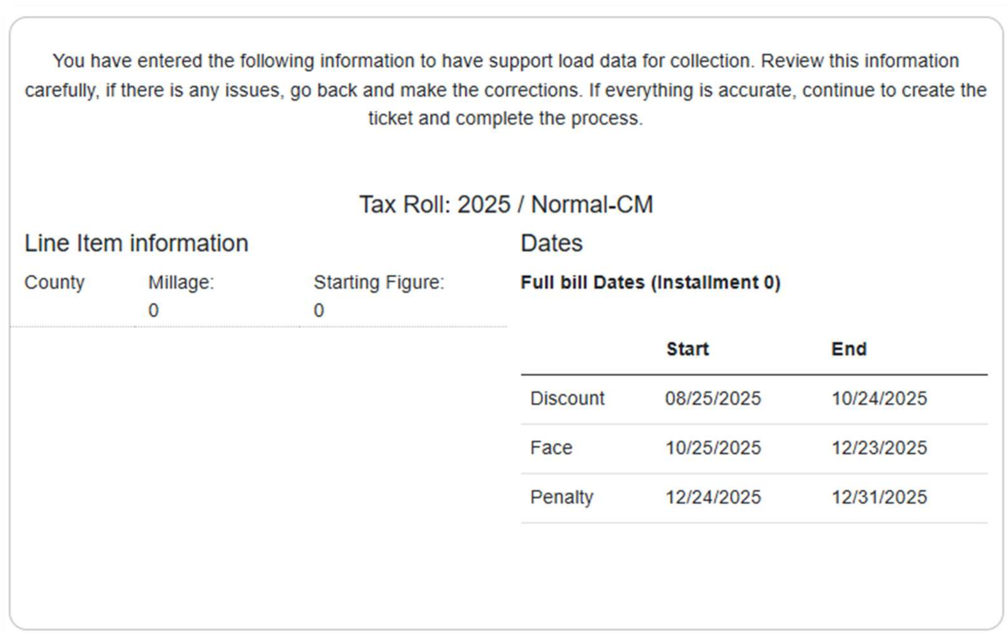
Step 8 – Name the tax Roll. The Fiscal Year is the Year when the bill is issued. The Sub Year describes the tax roll. Interims are usually in the format of A24, B22, etc. whereas the Full Tax Rolls are one of 3 values:

- Normal-CM – full County/Muni tax roll
- Normal-S – full School tax roll
- Normal-SL – full Street Light tax roll (for those collectors where a Street Light is it's own tax roll)
- Normal-PC – full County/Muni Per Capita tax roll
- Normal-SPC – full School Per Capita tax roll

If the information is correct, click the continue button. Otherwise click the back button to make appropriate corrections.

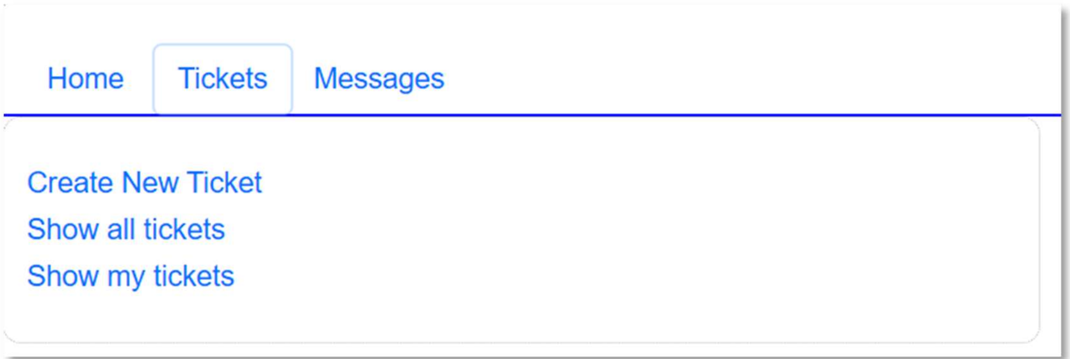


The final step brings all the information to the collector for confirmation. Review the information carefully. If the information is correct, click the continue button. Otherwise click the back button to make appropriate corrections.

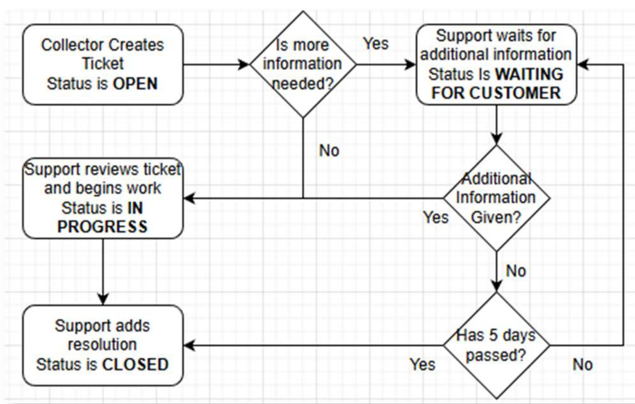


Tickets

Tax Discovery has a built in support system. This is when the collector has a problem that needs to be fixed but cannot fix it themselves. When this occurs, a support ticket is created. The collector can also view all tickets created or just those created by the collector. To access the ticket system, click on the Tickets button at the top of the page. From there, the collector can either create a ticket, show a list of all the tickets or show only those tickets create by the collector.



Below is a diagram that shows the lifecycle of a ticket



Creating A Ticket

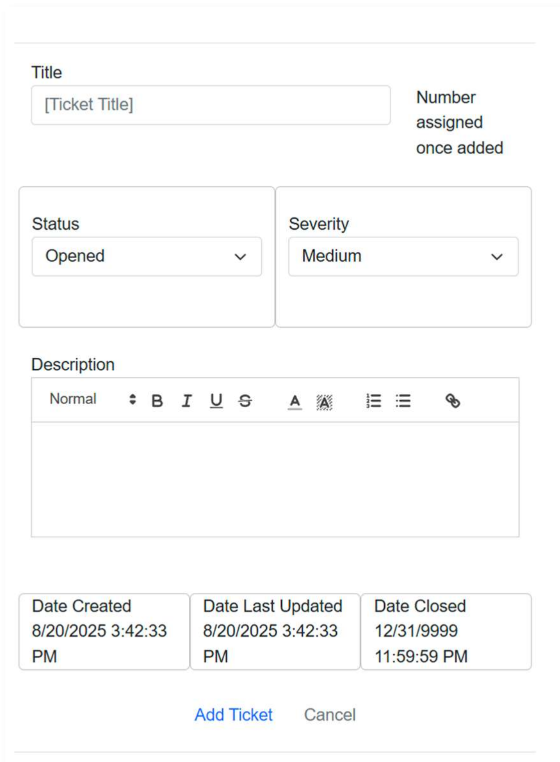
The user should provide a title to the ticket, description and severity. Severity should follow these guidelines:

High – The Collector is at a complete standstill because something is not functioning in the application.

Medium – Most common. The collector needs support but has not come to a complete halt. This is for data related issues or errors in the form and general support.

Low – The collector has identified something and has not bearing on the flow of the system or data for the collector. Things like misspelled words, hard to read pages, etc.

Suggestion – This is reserved for when a collector has an idea and wants to see if it can be incorporated into Tax Discovery for everyone to use.

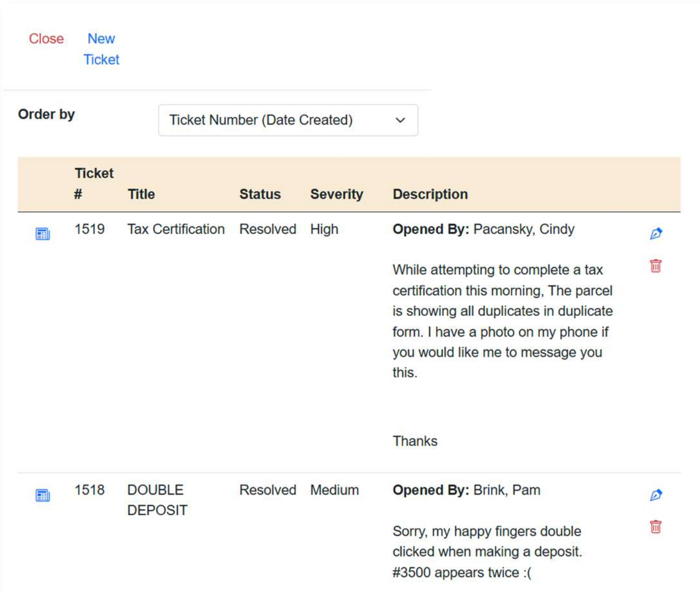


Once the information has been entered, click on the Add Ticket button.

Special Note: *Be as detailed in the description as possible. Provide parcel if you can or whatever can help support zero into where the problem is. Failure to provide clear and detailed information can result in delays in the resolution of the ticket or possibly no resolution at all.*

Viewing tickets

When the collector wants to show all tickets or only their own, this list is provided that shows the status of the tickets. If the user wishes to sort by status, change the dropdown open to change the sorting. The list default to having the most recent ticket at the top. To view the details of the ticket or to add notes, the edit button is to the left of the ticket number.



The detail of the ticket is shown to the collector. The collector can add additional notes a the bottom of the ticket. Simply add the appropriate note and click the add button. The collector and support will add notes when appropriate.

Title
Tax Certification # 1519

Opened by: Pacansky, Cindy

Status	Severity
Resolved	High

Description

While attempting to complete a tax certification this morning, The parcel is showing all duplicates in duplicate form. I have a photo on my phone if you would like me to message you this.

Thanks

Resolution

This is possibly de to a couple of issues, one a double click on the load could cause the problem or two, the browser may be caching the page and it is in need of a cleaning which is done when the browser is restarted or the computer restarted.

Date Created	Date Last Updated	Date Closed
8/19/2025 9:31:05 AM	8/19/2025 9:31:05 AM	12/31/9999 11:59:59 PM

Notes:

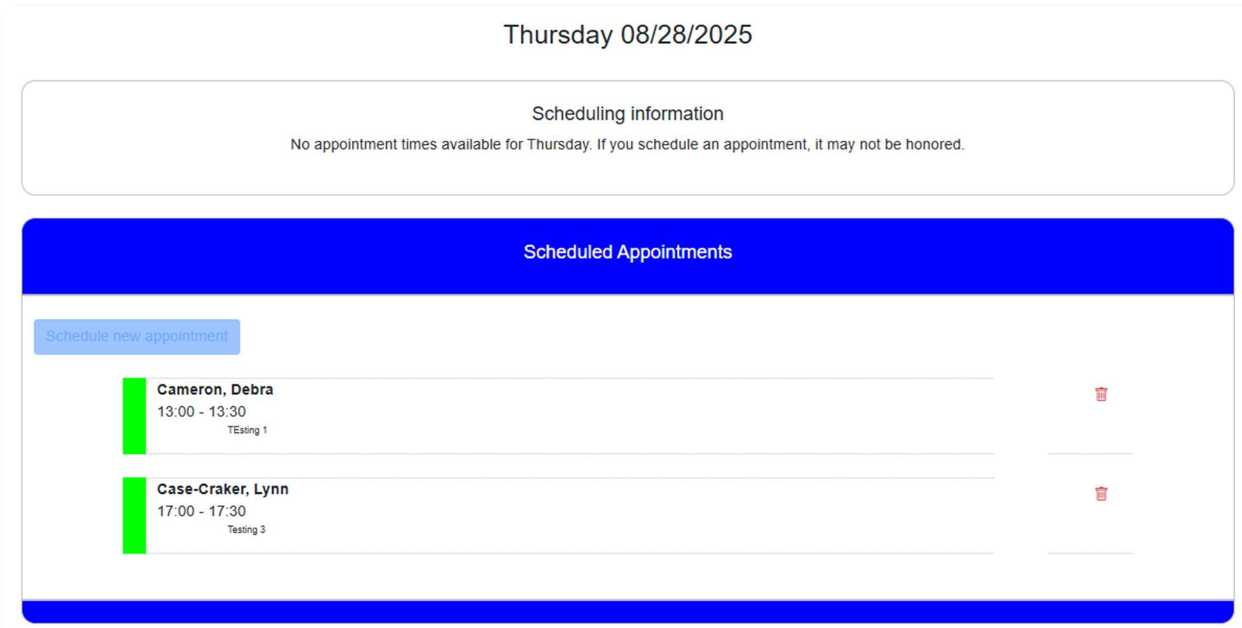
Add a note

Normal B I U S A

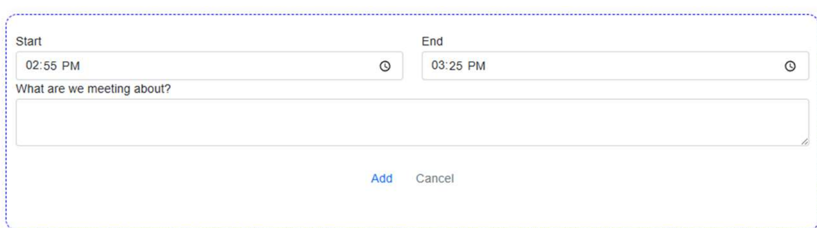
Add

Scheduling an appointment

Support for Tax Discovery offers some limited office hours for appointments. When entering the appointment scheduler, the collector will see today's appointments. Click through the days using the right arrow to go to the next day and the left arrow to go to the previous day. Once the day for the appointment is shown, click on add appointment.



Enter the time start and end (15 minute increments please) as well as the reason for the appointment. Click the add appointment button to schedule. This will put the appointment in a non-confirmed state. Support will review the appointments and confirm them. If an appointment is not confirmed, this means that support does not know of the appointment, follow up with a message or ticket if this remains unconfirmed for more than 48 hours.



Please be respectful of the scheduling of appointments. Schedule appointments at least 24 hours in advance and keep the appointments to an appropriate amount of time so that others can also schedule appointments.

If an appointment is scheduled outside the office hours or a day that office hours are not held, those appointments could be rescheduled or removed.

If the appointment is created by the tax collector, it can be removed by the tax collector if it is no longer needed by clicking the trash button to the right of the appointment. Only support and the collector who created the appointment can remove an appointment. No collector can remove another collector's appointment.

General Office Hours for appointments

Monday, Wednesday and Friday – 6:00pm to 8:00pm

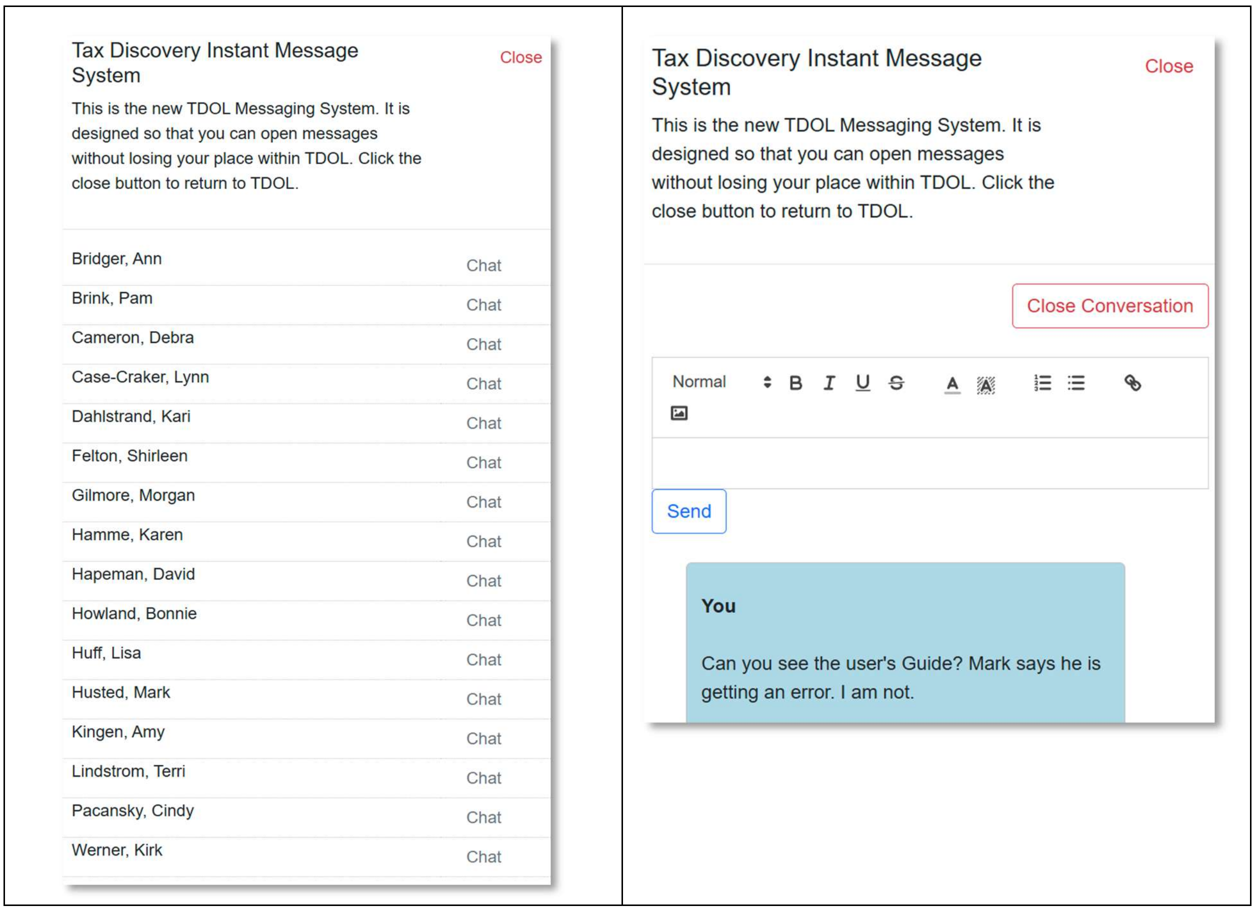
Saturday and Sunday – 11:00am – 3:00pm

The collector has the ability to schedule an appointment outside these hours, however, there is no guarantee the appointment will be honored.

Messages

Tax Discovery has a built-in Instant Message system. This is where the collector can send a message to another collector or support for a question or help. When one collector sends a message to another, the message button changes color and places a number in parentheses on the button indicating how many messages are waiting to be viewed.

To get to the messaging system, click on the message button and a list of the users will be displayed. Click on the chat button with the person you wish to communicate with. From there, type in a message and hit send. The user will be immediately alerted and will respond signaling the original user appropriately.



Certify a Tax Roll

The Tax Discovery Online Tax Roll Certification process is done when support has loaded data from the taxing authority of bills to be collected. Once that process is completed, it is the responsibility of the collector to validate the data load to ensure that information is accurate and ready to collect.

Getting started

The collector starts by choosing the tax roll to be certified.

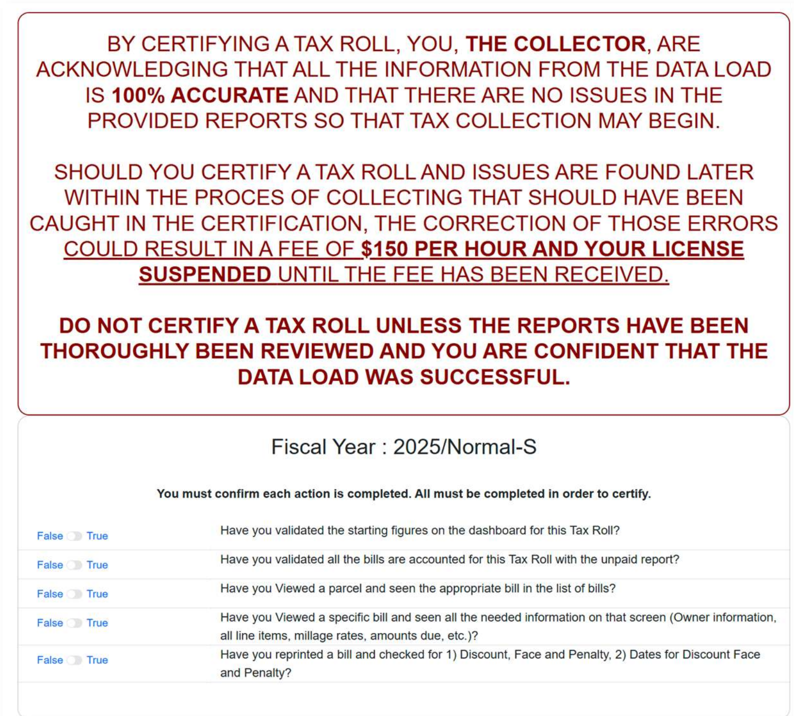
Points of interest

The information is presented to the collector showing a summary of the number of bills, the collection dates, the totals for discount, face and penalty as well as a list of each bill within the tax roll. This page is designed to allow the user to navigate to various parts of Tax Discovery to help certify the tax rolls. Clicking on the printer will reprint a bill. Clicking the parcel will take the collector to the parcel page. Clicking on the bill will take the collector to the specific bill that is to be collected.

Certifying the tax roll

To start the certification process, the collector clicks the CERTIFY NOW button which will display a series of questions that the collector must answer that the task in question has been checked by the collector.

Special note: *There is a warning on this page that this process is critical to the process. If a tax roll has been certified by the collector and collection started, if there is a problem that should have been caught during this process could result in a fee and suspending tax discovery until the problem is corrected. Be extremely thorough through the certification process because this is the starting point and if inaccurate, the collector could severely impact the integrity of the collection process.*



Once all questions are answered as true, a certification button will be displayed, click on the button. A second confirmation button will be displayed confirming that the collector accepts that the data is loaded properly and collection may begin. Click Yes to certify.

Dashboard

The Tax Discovery Online Dashboard allows the tax collector to review the current state of a tax roll. The information is updated as the collector performs tasks throughout the system.

Getting started

The collector first must choose one of the active tax rolls to obtain the dashboard of information for that tax roll.

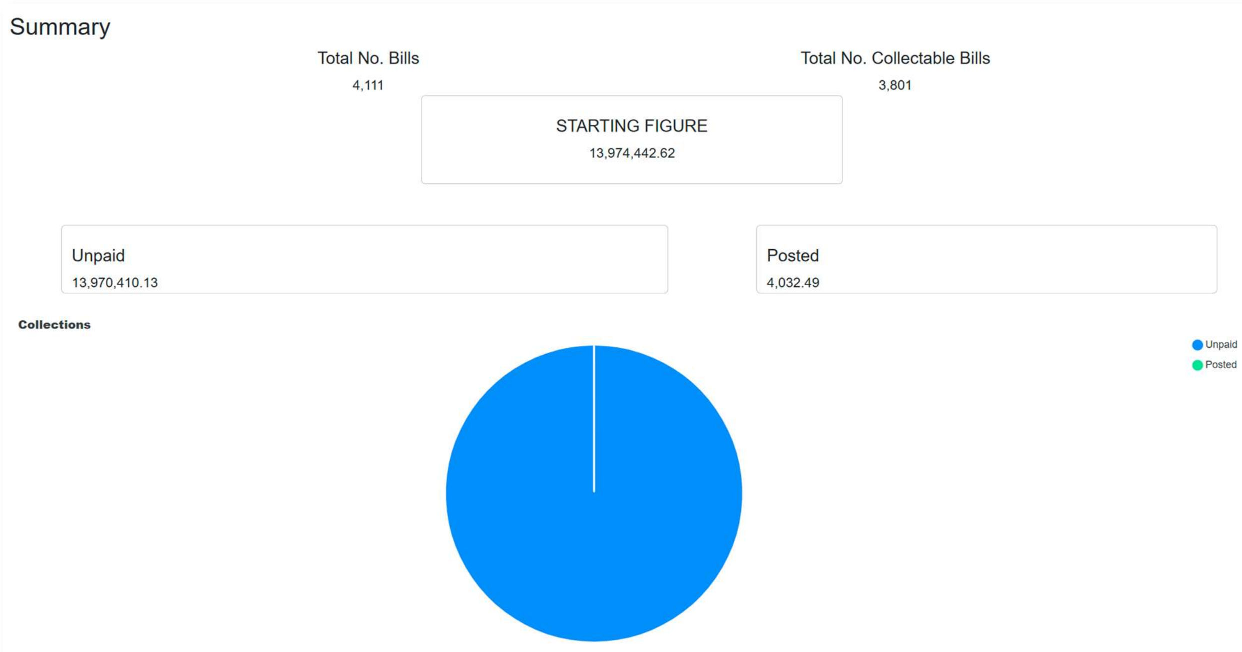
Points of interest

Summary

The summary section shows the tax collector the snapshot of the tax roll. Below are some definitions of the information

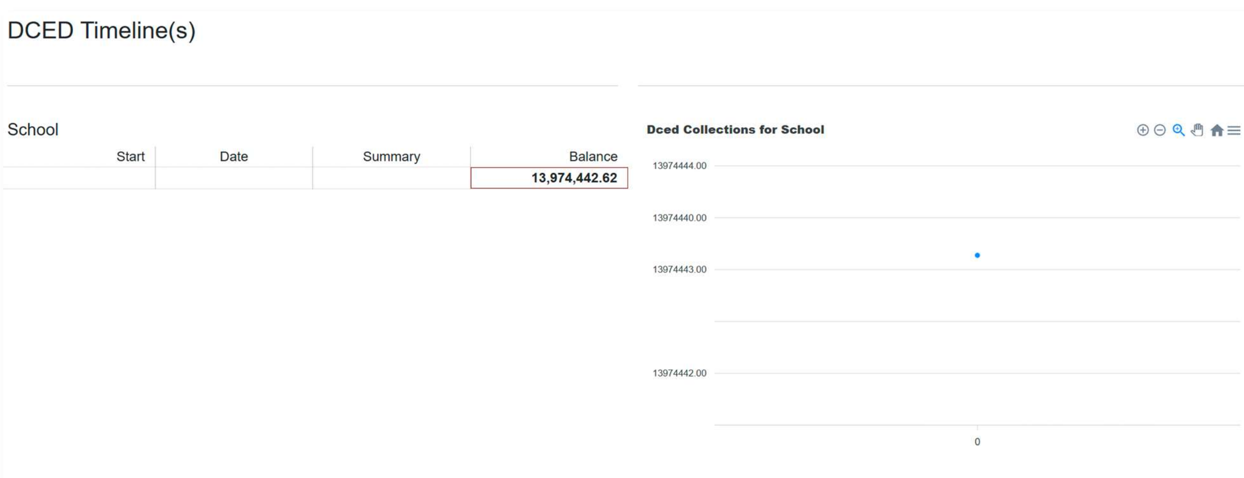
1. Total No. Bills – This is the total count of bills within the tax roll.
2. Total No. Collectable Bills – This is the total number of bills that have money that is to be collected (i.e. Amount at Face is greater than zero)
3. Starting Figure – This is the face amount of all the bills in the tax roll. This will never change.
4. Face amount at various stages
    a. There are 7 stages of the collection process, Unpaid, Posted, Deposited, Cleared, Remitted, DCED, and NSF
    b. The face amount of a bill will be located in one of these 7 stages.
    c. As the collector performs tasks, the face amount will move throughout the 7 stages. At the start, all money will be unpaid. At the end of collection, the money should be in unpaid, DCED and NSF if applicable. The posting, deposit,

cleared and remitted are transitional stages but all should be empty at the end of the collection period.



DCED Timeline(s)

As the Collector completes the DCED process, the information is recorded and shown in this timeline.



Installment Details

This section will show the face amount and stages for each of the installment payments. Installment 0 is default meaning that it is the full bill.

Installment Details

Installment	Starting Figure	Exonerated	Unpaid	Posted	Deposited	Cleared	Remitted	Dced	NSF
0	13,974,442.62		13,970,410.13	4,032.49					

Taxing Authority Details

Since some tax rolls are collecting for multiple taxing authorities, this section shows the face amounts in each of the 7 stages of tax discovery

Taxing Authority Details

Taxing Authority	Starting Figure	Exonerated	Unpaid	Posted	Deposited	Cleared	Remitted	Dced	NSF
School			13,970,410.13	4,032.49					

Bills

Not shown by default, the user has the ability to see a list of the bills that are within the tax roll, by clicking the show bills button, the dashboard will obtain a list of the bills.

Below is a sample list of the bills where the collector can, reprint, go to the parcel or go directly to the bill.

« ‹ **Showing 0 - 25 of 4,111** › »

Note, clicking on the printer, parcel or bill will open in a new tab. Once you are finished in the new tab, it is best to close it to come back to this page.

Parcel	Bill	Owner	Paid	Disc	Face	Penl
40-001-001.0-001.00	000000/0	KISIEL MICHAEL A UX THERESA M	2,403.15	2,403.15	2,452.19	2,697.41
40-001-001.0-001.01	000000/0	GERVASE JAMES S UX KIMBERLE	1,548.70	1,548.70	1,580.30	1,738.33
40-001-001.0-002.00	000000/0	NIEMI ALLEN P UX CHRISTINE C	0.00	57.14	58.31	64.14
40-001-001.0-002.01	000000/0	MCGARVEY DANIEL J UX ANNE J	0.00	57.14	58.31	64.14
40-001-001.0-002.02	000000/0	OTT KRISTA A	0.00	58.60	59.80	65.78
40-001-001.0-003.00	000000/0	SCHOTTS JUSTIN	0.00	2,371.21	2,419.60	2,661.56
40-001-001.0-004.00	000000/0	BROWN MARY L ET KESSLER	0.00	1,535.52	1,566.85	1,723.53
40-001-001.0-005.00	000000/0	SENNETT PATRICK M UX REBECCA	0.00	2,753.45	2,809.64	3,090.60

Daily Ledger

The Tax Discovery Online Daily Ledger allows the collector to see information that has occurred on a specific day of collecting bills.

Getting started

The collector is immediately displayed a list of dates where collections have occurred. In the list shows the number of transactions, how many bills, the actual amount collected and the amount at face. This information is across all tax rolls.

The collector is shown 25 days at a time and can navigate forward and backward through the list.

« ‹ Showing 0 - 25 of 1 › »

	Date	# Transactions	# Number Bills	$ Collected	$ Face
View Details	08/05/2025	1	2	3,951.85	4,032.49

Viewing Details

When viewing the details of a specific day, the collector will see the bills that were collected on the left side and on the right side the transactions that are collecting those bills.

Details

Bill Collected

(Count: 2)

Parcel	Bill	Owner	Paid	Disc	Face	Penl
40-001-001.0-001.00	000000/0	KISIEL MICHAEL A UX THERESA M	2,403.15	2,403.15	2,452.19	2,697.41
40-001-001.0-001.01	000000/0	GERVASE JAMES S UX KIMBERLE	1,548.70	1,548.70	1,580.30	1,738.33

Transactions

(Count: 1)

Transaction #	$ Bill	# Bills	$ Money	$ Refund	$ P Cash	Postmark	Actual
1	3,951.85	2	3,951.85	0.00	0.00	08/05/2025	08/05/2025

Authors & Collaborators

David Hapeman – Support and Author

Debra Cameron – Summit Township Tax Collector and Collaborator

Mark Husted – Greene Township Tax Collector and Collaborator

Revision History

Date	Description
09/01/2025	Creation of the initial document

Appendix A – The Menu

The menu bar of the left is organized as follows. Please note that this is subject to change as items are added, or removed.

Quick Links

- Blog
- Parcels
- [List of quick link from settings]

Favorites

- [List of favorites added in settings]

General

- TDOL Settings

Search

- TDOL Search

Actions

- Posting
- Transactions
- Banking
- Remittances
- Dceds
- Exonerations

Reporting & Certifications

- Reporting Page
- Analytics
    - Dashboard
    - Daily Ledger
- Certifications
    - Parcel Certification
    - Tax Roll Certification

Documentation

- Table of Contents

Miscellaneous

- Remove Installment
- Certification Contacts

Help, Support & Community

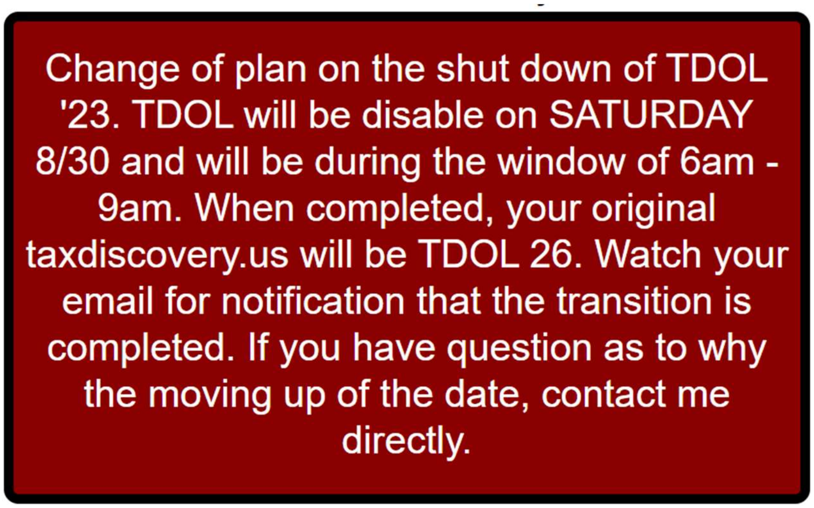
- User's Guide
- Request for Data Load

Appendix B – Details on the Home Page

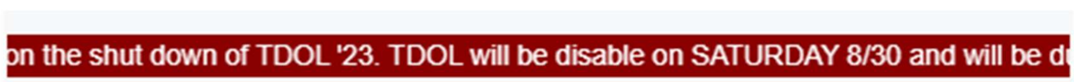
There are pieces of the Home Page that are detailed.

Urgent Messages

This is shown when there is an urgent communication that is needed for all to see immediately. On the home page, it will have a red background and white letters at the top of the page.



At the top of every page, when an urgent message has been produced, there is a marquee with that message scrolling at the top.



It is extremely important that if a message is display in these two areas that the collector read IMMEDIATELY. These are used when the vendor has something that must immediately happen or will happen that effects users of TDOL. These messages will be infrequent and for immediate action/understanding. It is most likely that they appear due to TDOL Downtime or immediate corrections that are required.

System Messages

These are messages that the vendor want to communicate to everyone that are not critical, however, could still be important. If they need close attention of the collection, the message will have a pink background.

System Messages (pink message are important)

> Any missing or needed functions in TDOL will need to have a ticket created for tracking purposes.

Who is on line

This is a list of TDOL Users and the status of their availability for sending messages. If the user has an “X” to the left of their name, it means that they are not on line. If it is a yellow circle, this means that the user is on line but has not done anything for 5 minutes and is probably away from the computer. If it is a green circle, the user is currently active.

Who is on line

⊗	Bridger, Ann
●	Brink, Pam
⊗	Cameron, Debra
⊗	Case-Craker, Lynn
⊗	Dahlstrand, Kari
⊗	Felton, Shirleen
⊗	Gilmore, Morgan
⊗	Hamme, Karen
●	Hapeman, David
●	Howland, Bonnie
⊗	Huff, Lisa
●	Husted, Mark
⊗	Kingen, Amy
⊗	Lindstrom, Terri
⊗	Pacansky, Cindy
⊗	Werner, Kirk

Blog Posts and Tickets

The Blog counter shows all the topics of the TDOL Blog and how many posts in the past 5 days have occurred under each topic.

Tickets show the number of tickets the user has opened and the status of each of them.

Blog Posts in the last 5 days

Reports	
Deposits	
Posting	1
DCED	
Miscellaneous	3
Know your System	2
Enhancement Discussion	7
Future Enhancements	
FAQ	
Remitting	
Utilities	

Tickets

Status	Needs Attention	Total Tickets
Opened		
In Progress		
Waiting for Customer Reply		
Resolved		1

Last 5 Updates

This section shows the last 5 upgrades and what was upgraded. It is a good idea for the collector to review this list each day to keep abreast of the current changes made with TDOL.

Last 5 Updates

8/27/2025 6:34:52 PM

Upgrade Includes

- Updates to documentation
- Upgraded Search Engine
- Certification Contact Maintenance
- Updated Icons and clean-up.
- Updates to inline documentation.
- Fix to DCED Printing and Sorting with changes to profile settings
- Request Data Load Functionality and Documentation

8/22/2025 7:53:04 AM

Upgrade Includes

- Addition of User's Guide under help
- Additional In Line Documentation
- Some clean-up of the blog

8/19/2025 7:07:00 AM

Upgrade Includes

- Remove Installments functionality under Miscellaneous Section
- Added More Documentation

8/15/2025 5:49:44 PM

Upgrade Includes

Appendix C – Details concerning Posting

This appendix is detailing some common scenarios and how best to handle them within the Posting Screen.

Scenario

The collector has received a large number of bills from a mortgage company with one check.

Scenario

The collector has received a number of bills and multiple checks from the same taxpayer.

Scenario

The collector has received a bill during the discount period and the taxpayer paid the face amount.

Scenario

The collector has paid a bill and wrote the check for a penny more than the bill.

Appendix D – Getting Help

Everyone needs help with tax collection, not all situations can be handled through programming but there are ways to get help. Every new collector using Tax Discovery is requested to have "a sponsor". The sponsor's job is to be a point of contact a new user can refer procedural questions or some assistance when confused about a process. Tax Discovery has a number of other ways for a collector to get additional information. These include, inline help, this user's guide, Messaging, Blog and Tickets.

With all these different ways to get help, it is recommended that the collector use this hierarchy of getting assistance

1. In Line Help – "?" on a page
2. User's Guide
3. Blog
4. Message Sponsor
5. Message another Collector
6. Phone call to Sponsor
7. Open Ticket
    a. Mainly when something is wrong. Do not open tickets for questions. Use the blog for open ended questions so that they are available to others and future review.

It is important that each collector respect as much as possible this hierarchy because we all have periods of high and low volumes of work. We are a community of users and use these tools to help not only ourselves but others now and in the future. The vast majority of situations a collector will encounter have been encountered by other collectors. Using the knowledge of collectors enhance the process for all. Support, the vendor, will adjust tax discovery but may not have specific knowledge in the "why" a process needs to be done.