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Facts & Figures

Leading the way in online information for your jurisdiction | by Chip Cooke

Data – Big Data – Data Warehouse. You can't pick up a newspaper (people still do that, right?) or browse the news outlets on your tablet without reading a story about big data in the United States. The NSA collects virtually every instance of electronic communication in its global war on terror. Large data companies buy and collect massive amounts of data to resell for countless different applications. Quite frankly, the data we create is important. It tells us much about ourselves, our habits, and even our intentions. The ability to correctly decipher data matters, and those who have a strong handle on this function are valuable to everyone else.

We at Tax Management Associates like data – no, wait – we love data. We collect data, we analyze data for trends, and we look at data from our hundreds of different projects. We then give the resulting information back to our clients in a way that improves their day to day lives. To be honest, that is what is important, making a difference to the

state and local government jurisdictions we serve. For the better part of 35 years we have given our clients the information they needed through an

“Informer is made just for you and your jurisdiction. Every TMA service will be displayed on your dashboard. Whether you are utilizing one TMA service or four, all of the information will be at your fingertips.”

oral or written medium. Managers pick up their phone and call clients about important matters or trends. We created hundreds of written reports

detailing project status, numerical values, and summaries of relevant points. Whether on a weekly, monthly or quarterly basis, our clients expected their TMA counterparts to reach out to them to convey the important information around our partnership.

TMA turned the information loop on its head with the launch of the Informer portal. For the first time clients will have real time access to all of their various TMA projects and initiatives. With simple login credentials from any internet connection, TMA clients will be able to peruse statistics and project status pertaining to personal property audits, homestead exemption programs, CAVS statistics, data mining projects, and online listing programs. While we always want to make sure that we keep the personal touch alive and well, we also thought that having unlimited access to your individual project's data sounded pretty cool too.

Informer is made just for you and

If you have any questions or comments about this article, please contact Chip Cooke at 1-800-951-5350

your jurisdiction. Every TMA service will be displayed on your very own dashboard. Whether you are utilizing one TMA service or four, all of the information will be at your fingertips: Audits in process, event calendars, and other important updates are available in real time. As TMA makes changes in our internal control and reporting software, the jurisdiction will see the same changes in Informer. As we know, you know!

Managing data in this way and giving you access with the click of a mouse is our way of being proactive in the information superhighway. For example, let's say that you have a big budget meeting coming up and the finance department or a commission member wants to know the financial impact to the property tax base from the comprehensive audit program you put in place last year. Information like that will be available very soon on the portal in a quick glance. Of course, you can always call your TMA point of contact and we will be happy to send you that information. Or, you can log in to TMA's Informer portal and see the information on your own screen. What if the County Administrator received a call from the local newspaper about the ongoing homestead exemption audit program. The paper would like to know how many exemptions have been denied and how many are left to be examined. Easy, login to Informer and your statistics are right there. Need to know how many taxpayers have already filed personal property extensions this year? Login and your Taxscribe statistics are right in front of you.

Data can be a wonderful tool, but only if your queries are correct and the information it creates is readily accessible. I once had a professor tell me that almost everyone will make a sound decision if they have the correct information. I buy into this concept whole heartily and that's why TMA is doing its best to provide our clients with information in the easiest way possible.

Over the coming weeks and months TMA personnel will be reaching out to your respective offices to demonstrate Informer's capabilities, provide login credentials, and solicit feedback. As with everything that we do, we appreciate your honest feedback on

how we might make this service a more pleasant experience for you. We welcome your comments and suggestions; and after we have tallied all of the responses, we will do our best to implement those changes as quickly as possible. If you would like to jump start the process for your jurisdiction, please don't hesitate to reach out to our corporate office at 1-800-951-5350 and we'll put you in touch with the right individual.

We appreciate the opportunity to work with all of our wonderful clients across the United States and will continue to do our part in making sure your data is useful and accessible. Thank you for your continued support!



TAX

Taxpayers in Alabama, Louisiana, North Carolina, and Tennessee can file business p

Did you know taxpayers in North Carolina, Alabama, Tennessee, and Louisiana can file business personal property listings online? Taxscribe is the only multistate online listing service in the United States. In efforts to cut costs, reduce labor, and increase accuracy in listings: online listing is the answer. Over the past three years North Carolina has already seen a huge growth rate in the number of users.

Think TurboTax[®], but for business personal property listings. Taxpayers may have math anxiety in addition to tax anxiety. Why not reduce their apprehension while saving time and money? In a matter of minutes you can easily navigate through TurboTax to file your state and federal tax returns. Taxscribe[®] is just as easy and you don't have to download anything. There is no software to buy, install, or maintain. Simply log onto: www.taxscribe.com to check out your customized state form.

How many times have you received

an incomplete, inaccurate, or a blank listing form? Stop wasting your time and energy. Taxscribe makes filing easy

“Taxscribe is the only multistate online listing service. Regardless if a jurisdiction has its own online system, taxpayers may still use Taxscribe to easily file taxes online. This customized service utilizes your specific state form”

and efficient. Do you already have an online listing system? Regardless if a jurisdiction has its own online system

taxpayers may still use Taxscribe to easily file taxes online. This customized service utilizes your specific state form, streamlining the filing process. Since TMA uses your state form, taxpayers may sign electronically online, file their information, and even print it to send to the tax official. Want to store your information to save your taxpayers time when filing next year? Taxscribe will store data to prevent having to rekey assets every year.

Here's what one reviewer had to say about Taxscribe, “Boatsman Gillmore Wagner PLLC has been using Taxscribe for the preparation of property tax listings for approximately four years. With listings to prepare for over 200 clients we have found this program to be very time saving and cost efficient for both our clients and us. The extension process could not be easier and allows us to extend the necessary listings with just a few keystrokes. Prior to using the program we were required to send in written requests for any

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online

personal property taxes online using TMA's very own Taxscribe® | by Ryan Hunter

listing we needed to extend the filing process time. Support Staff is very responsive to our questions and request, and any issues are solved promptly. I highly recommend that any CPA firm or small business sign up for Taxscribe!"

Ben Chavis, Tax Director of Guilford County, had this to say about Taxscribe, "Online listing and electronic services is clearly the way of the future. We've been using Taxscribe every year since it was introduced and usage has increased each year. We have seen the process evolve and improve each year. I see electronic listing as a necessary tool for both counties and taxpayers."

Who uses Taxscribe?

From the CPA with clients across several counties, to the mom and pop business with one location, Taxscribe simplifies the business personal property filing process for a variety of users. Additionally, Taxscribe allows the taxpayer or preparer to file extensions,

send listings to clients for approval, upload spreadsheets, and electronically sign listings.

Innovative and Responsive Technology:

TMA developed Taxscribe with the needs of both taxpayers and jurisdictions in mind. TMA understands the taxpayer's wish to file taxes quickly and efficiently while being able to file in multiple jurisdictions from one filing source, or even across multiple states. While the jurisdiction's desire is to obtain accurate listing data as efficiently as possible without the cost of software to buy each year. As a result, Taxscribe comes equipped with the following features:

- File for multiple businesses across counties, cities, and states from one location.
- Text fields that replicate the state form to produce accurate listings for each business.

- Live customer support via email, phone, and chat.

- Payment card industry data standard compliant website with encrypted 256 bit SSL certificate validated by Startfield Technologies.

- Data storage for easy filing in future years. Taxpayers only need to add additions and deletions after their data is entered into Taxscribe the first time.

- Sharing capabilities for CPAs and tax preparers to send listings to clients for approval and signature.

- Secured hosting with PAETEC colocation data-center solutions.

If you would like to know additional information about Taxscribe, how we can customize a form for your state, or to see a demonstration, please call us to schedule a time to show you how you can utilize Taxscribe in your jurisdiction.



Informer

Time is money. Access your data right now. | by Taylor Ennis

Do you use online banking? The ability to transfer money on the spot is awesome. It's so easy to view your current account balance in real time. Now more than 51% of adults in the United States pay bills, transfer funds, and manage their money online.

Think of Informer like your online banking portal but for TMA projects. We know your time is important while instant and accurate data is necessary. We're connecting you to your data, now. If TMA conducts audits for your jurisdiction, you don't have to call us to find out where we are in the process. By logging onto Informer, you can easily access your specific project details.

If you're a TMA client and haven't accessed Informer please contact Renee Abernathy at (704) 814-7206 or Renee.abernathy@tma1.com to receive login information.

Informer's secured access portal is your one stop shop for real time details about

your audits, online listings, homestead exemptions, CAVS estimates, and discovery projects.

Why should I access Informer? It's

"Informer's secured access portal is your one stop shop for real time details about your audits, online listings, homestead exemptions, CAVS estimates, and discovery projects."

your information and you should have access to it. For free. There's no need to download anything, an internet connection will suffice. Should you

need updates regarding your projects right now, Informer can get statistics for that. There's no additional charge for this service.

What if a taxpayer comes into your office with questions regarding their audit performed by TMA? They want specific information. You can log onto Informer and access your audit tab and locate: who performed the audit, when the audit was conducted, its current status in the system, and the discovery status. With the ability to quickly and easily access these details together, TMA and your jurisdiction can resolve any issues in order to assist taxpayers in the most efficient way.

Informer also provides access to statistics in CAVS (Cost Analysis Valuation System). CAVS is typically used to estimate businesses that have not filed a business personal property listing. This valuation software provides an estimated amount for typical business assets. Informer will show the

If you have any questions about this TMA service, please contact Taylor Ennis at 1-800-951-5350

total number of estimates per year, the total value of the estimates, and how much longer you have access to CAVS. Should you need to renew your CAVS subscription, you can do so through Informer.

As a homestead exemption client, you can locate exemptions via name, account number, or address. Informer will also verify the status of the accessed account as: Accepted, rejected, pending, or approved. With authorization you can also change the status of an account.

I spoke with Theresa Gaffney, Property Quality Control Supervisor with DeKalb County Property Appraisal in Georgia about her experience with Informer. Gaffney, along with five others, have access to the Informer Portal in her office. She utilized this tool specifically to manage DeKalb's Homestead Exemption project.

"Informer gave me the ability to sort between TMA recommendations and accounts that still needed review. I could export the information and divide the work between my staff. With numerous parcels it was easier to separate the work into smaller batches.

The ability to export information into an excel spreadsheet was ideal. I could then create an agenda item from the excel spreadsheet with pertinent information to present during Board of Assessor meetings."

Gaffney said how the ability to manipulate the data from Informer and transfer it into her own system without re-keying was essential. It may have taken their project additional years to complete had this not been possible.

"While taxpayers may not respond when we send out letters or call, we always hear from them when they receive a bill. The notes section gave an accurate account of attempts to contact the taxpayer, their questionnaire, and the current status of their account. Homestead exemption research is time sensitive and we work as quickly as possible in order to act upon current and accurate data."

The discovery portion in Informer is similar to homestead and audit. Account information is easily accessed in various ways. You may search by TMA ID, account number, business name, or address. Additional features include a notes section, current status, and the ability to view uploaded listings. You may also view annual totals, category breakdown of a listing, and schedule information.

Informer doesn't limit your data view to the nitty-gritty, it also provides a big

picture of your project data. You can run a real-time status report at any time. By knowing how many accounts need to be reviewed, you can accurately manage work flow and staffing.

Here at TMA, we want to make your job easier. If you have data requests, please let us know. We're always open to suggestions and want to know what you think.





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