Excise PST

Taxpayer Guide

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INTRODUCTION

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

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

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

Contact Information

If you require further assistance, please contact us.

Pioneer Technology Group, LLC

1100 Central Park Drive, Suite 100

Sanford, FL 32771

Toll Free: 1.800.280.5281

Office: 407.321.7434

Fax: 407.321.7971

www.pioneertechnologygroup.com

GETTING STARTED

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

Logging into the Excise PST System

Follow the steps below to access a user's account(s) in the Excise PST system.

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

   https://pst.occompt.com/pstorangelive/

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

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

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

4. Click **Log In**.

5. Is this the first time logging into the Excise PST System?

   If NO: Proceed to Step # 10.

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

   Note: Please note the specific password requirements.

6. Enter and or Update profile information.

Contact Information

Type: *	⊙ Taxpayer (You need to file Tax Information for a service)
Name: *	PST Taxpayer
Primary Contact:	
Phone: *	407-555-2424
Alternate Phone:	
Fax:	
EmailAddress: *	PSTTaxpayer@PST.com
Mailing Address: *	123 Main Street
City: *	Any City
State: *	FL
Zip: *	12345
Country:	USA
Security Question: *	What city were you born in?
Security Answer: *	Any City
Correspondence:	☐ Send Email ☐ Send by Mail

Register **Reset**

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

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

Please choose one
Please choose one
What is your mother's maiden name?
What city were you born in?
What is your favorite color?
What is your favorite pet's name?
What was the model of your first car?

8. Enter Security Answer.

Security Question: *	What is your favorite color? ▾
Security Answer: *	blue

9. Click **Save Changes**.

Save Changes

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

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

Logging out of the Excise PST System

Follow the steps below to log out of the Excise PST System.

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

Result: User will be logged out of the Excise PST System and returned to the Home Screen.

Navigating through the Taxpayer Home Screen

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

Menu Items

The Menu on the left of the screen allows a user to perform the following functions:
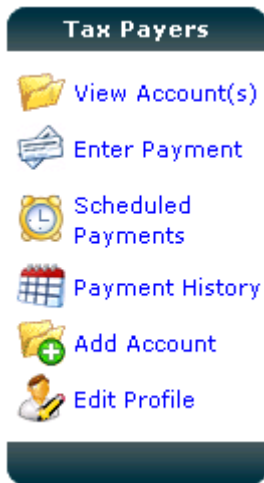
- o **View Account(s)** will bring a user back to the Home Page.

- o **Enter Payment** will allow a user to go straight to the payment screen to pay any outstanding taxes on submitted returns.

- o **Scheduled Payments** will allow a user to view any scheduled (pending) payments on their account.

- o **Payment History** will allow a user to view prior payments made within the Excise PST System.

- o **Add Account** will allow a user to add a new account. (Note: this option may not be available in all taxing districts.)

- o **Edit Profile** allows a user to make changes to their contact and login information including changing their passwords.

Account Information at a Glance

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

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

2. The user can also view any outstanding returns due, as well as the next future return due.

VIEWING AND UPDATING ACCOUNT INFORMATION

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

Viewing/Editing User Profile and Login Information

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

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

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

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

New Password: _____

Confirm Password: _____

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

Save Changes

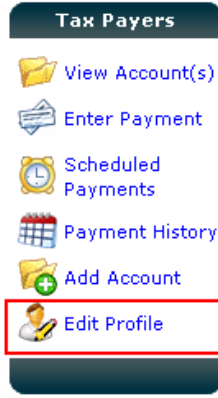**Result:**   The following message will display at the top of the screen confirming changes:

ⓘ Changes Saved.

Viewing/Editing Account Information

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

1. Select **View Accounts** from the Menu.
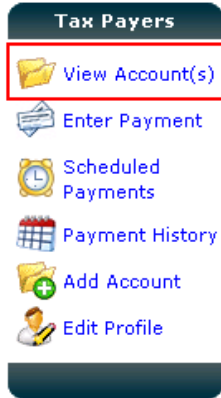
Result: The **View Account Screen** appears.

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

General Account information

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

Editing Account: 23	
Account Name: *	MLM Water Company
Attention:	
View Map of this Address	
Address:	123 Main Street
Address2:	
City:	Any City
State: FL	Zip: 12345
Phone:	407.555.2424
Alternate Phone:	
Fax:	Website:
Tax Type:	Electrical Tax
Federal Tax ID Or SSN:	123456789
Sales Tax Number:	111222333444
Description/Notes:	
First Reporting Date: *	6/1/2008
Owner Information:	
Owner Name:	PST Taxpayer
View Map of this Address	
Address:	123 Main Street
Address2:	
City:	Any City
State: FL	Zip: 12345
Country:	USA
Phone:	407.555.2424
Alternate Phone:	
Fax:	Email: PSTTaxpayer@PST.com

Save Changes   **Cancel**

1. **Account Name:** Name of Business. *(i.e. Joe's Gas Company or Fuel Stop Gas Station)*

2. **Attention:** Business manager's name or the main point of contact.

3. **Address:** Business street address.

4. **Address 2:** Additional business address info – Suite #, building name, etc.

5. **City:** City where business is located.

6. **State:** State where business is located.

7. **Zip:** Zip code where business is located.

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

8. **Phone/Alternate Phone:** Business phone number and alternate phone number, such as a cell phone number.

9. **Fax:** Business fax number.

10. **Website:** Business website address.

11. **Tax Type:** The business tax type.

    Note: Each different public service tax type requires its own account. Tax type field can only be edited when the account is first setup.

12. **Federal Tax ID or SSN:** The Federal Tax ID number or SSN number that is registered to the business.

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

14. **Description/Notes:** Any notes or additional information about the business.

15. **First Reporting Date:** The first date that PST's were collected for the business.

    Note: The First Reporting Date can only be edited when the account is first setup.

16. **Owner Name:** Business owner's name.

17. **Address:** Business owner's address

18. **Address 2:** Additional business owner's address info – Suite #, building name, etc.

19. **City:** City where business is located.

20. **State:** Business owner's state.

21. **Zip:** Business owner's zip code.

22. **Phone/Alternate Phone:** Business owner's phone number and alternate phone number, such as a cell phone number.

23. **Fax:** Business owner's fax number.

24. **Email:** Business owner's email address.

ADDING A NEW ACCOUNT

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

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

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

Adding an Account

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

1. Select **Add Account** from the Menu.
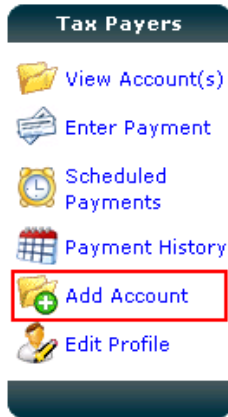
Result: The "**Are you sure you want to add a new account?**" warning appears.
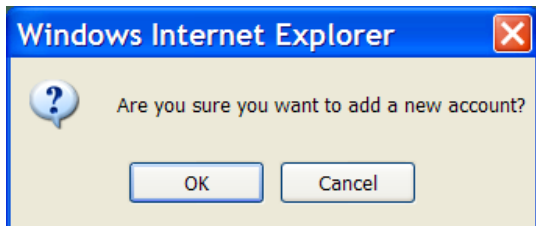
2. Click **OK** to proceed with adding a new account.

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

1. **Account Name:** Enter the name of the business. *(i.e. Joe's Gas Company or Fuel Stop Gas Station)*

2. **Attention:**   Enter the business manager's name or the main point of contact.

3. **Address:**   Enter the business street address.

4. **Address 2:** Enter any additional business address info – Suite #, building name, etc.

5. **City:**   Enter the city where the business is located.

6. **State:**   Enter the state where the business is located.

7. **Zip:**   Enter the zip code where the business is located.

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

8. **Phone/Alternate Phone:**   Enter the business phone number and the alternate phone number, such as a cell phone number.

9. **Fax:**   Enter the business fax number.

10. **Website:**   Enter the business website address.

11. **Tax Type:**   Select the business tax type.

Tax Type:	(Not Selected) ▾
	(Not Selected)
	Electrical Tax
	Fuel Oil Tax
	Natural Gas Tax
	Propane Gas Tax
	Water Tax

    Note: Each different public service tax type requires its own account. Tax type field can only be edited when the account is first setup.

12. **Federal Tax ID or SSN:**   The Federal Tax ID number or SSN number that is registered to the business.

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

    Note: As a taxpayer, you are required to register with the Department of Revenue. In the case of a pending tax number please enter "pending" in this field.

14. **Description/Notes:**   Enter any notes or additional information about the business.

15. **First Reporting Date:**   Enter the first date that PST's were collected for the business.

    Note: The First Reporting Date can only be edited when the account is first setup.

16. **Owner Name:**   Enter the business owner's name.

17. **Address:**   Enter the business owner's address

18. **Address 2:**   Enter any additional business owner's address info – Suite #, building name, etc.

19. **City:**   Enter the city where business is located.

20. **State:**   Enter the business owner's state.

21. **Zip:**   Enter the business owner's zip code.

22. **Phone/Alternate Phone:**   Enter the business owner's phone number and alternate phone number, such as a cell phone number.

23. **Fax:** Enter the business owner's fax number.

24. **Email:** Enter the business owner's email address.

25. Click on **Save Changes**.

.

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

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

SUBMITTING TAX RETURNS AND PAYMENTS

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

Completing a Tax Return

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

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

Result: The enter Tax Return window appears.

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

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

Result: The Total Amount Due is calculated.

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

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

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

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

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

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

Electrical Tax Return Item	Calculated
1. Gross Sales:	10,000.00
2. Exempt Sales:	1,000.00
3. Taxable Sales:	9,000.00
4. Total Electrical Tax 10%: ☑ Override	950.00
5. Plus Penalty:	0.00
6. Plus Interest:	0.00
Total Amount Due:	950.00

6. Click the **Submit** button.

Submit

Result: The payment screen appears.

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

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

Enter Payment - PST Taxpayer

MLM Water Company - Account #23 - Electrical Tax

Return Period	Due By	Due	Paid	Balance	Payment Amount
July 2008 R	8/20/2008	$3,079.51	$2,600.00	$479.51	
October 2008 AU	11/20/2008	$165.57	$50.00	$115.57	
August 2009 R	9/21/2009	$950.00	$0.00	$950.00	950.00

MLM Water Company - Account #28 - Water Tax

Return Period	Due By	Due	Paid	Balance	Payment Amount
September 2008 R	10/20/2008	$15.00	$0.00	$15.00	
October 2008 R	11/20/2008	$6,724.52	$100.00	$6,624.52	

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

Balance Due: $12,739.25
Total Payment: **$950.00**
Difference: $-11789.25

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

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

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

Note: Payment methods may vary by Taxing Authority.   If you choose not to pay online, skip to step # 12.

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

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

9. Select an existing stored payment account from the drop down menu and enter the payment amount, the Scheduled in date and reference/check number.

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

10. After all payment information has been entered, click on the **Submit** button.
Submit.

Result: Excise PST will refresh to the **Payment Receipt/Confirmation Screen.**

Payment Receipt - PST Taxpayer

Receipt for Public Service Tax Payment to PTG Test
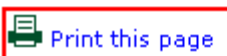
Receipt #84	
Taxpayer:	PST Taxpayer (PSTTaxpayer)
Receipt Date:	9/9/2009 11:43 PM
AsOf/Postmark Date:	9/9/2009
Accounting Date:	12/1/2008
Payment Type:	E-Check
Account:	PST Checking Account (****1112)
Reference:	Check # 2345
Total Paid:	$950.00
E-Payment Convenience Fee:	$0.00
Grand Total:	$950.00

Returns Paid			
Account	Return Period	Amount Paid	History
23 (MLM Water Company)	August 2009 R	$950.00	
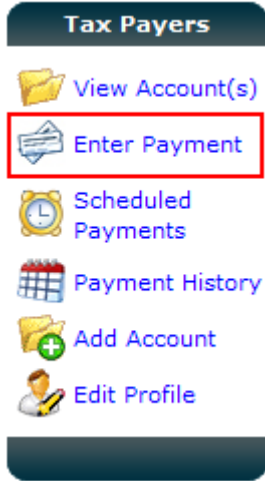
🖶 Print this page

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

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

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

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

Entering a Payment

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

Tax Payers

View Account(s)
Enter Payment
Scheduled Payments
Payment History
Add Account
Edit Profile

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

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

Enter Payment - **PST Taxpayer**

MLM Water Company - Account #23 - Electrical Tax					
Return Period	**Due By**	**Due**	**Paid**	**Balance**	**Payment Amount**
July 2008 R	8/20/2008	$3,079.51	$2,600.00	$479.51	
October 2008 AU	11/20/2008	$165.70	$50.00	$115.70	

2. Follow steps 7-12 on pages 25 & 26 to complete a payment.

Viewing Payment History

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

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

Tax Payers

- View Account(s)
- Enter Payment
- Scheduled Payments
- Payment History
- Add Account
- Edit Profile

Result: The Payment History Screen appears.

Payment History - PST Taxpayer

View Payments For: 2008

Receipt #	Amount	Date	Status	Pay Type	Ref #	Image?
84	$950.00	12/1/2008	OK	ECHECK	Check # 2345	N/A

Return Allocation	Account	Amount	Interest	Penalty	Tax	Fees
August 2009 R	23	$950.00	$0.00	$0.00	$950.00	$0.00

Receipt #	Amount	Date	Status	Pay Type	Ref #	Image?
83	$500.00	12/1/2008	OK	CHECK		N/A

Return Allocation	Account	Amount	Interest	Penalty	Tax	Fees
July 2008 R	23	$100.00	$79.51	$20.49	$0.00	$0.00
September 2008 R	24	$100.00	$0.00	$0.00	$100.00	$0.00
September 2008 R	26	$100.00	$0.00	$0.00	$100.00	$0.00
September 2008 R	27	$100.00	$0.00	$0.00	$100.00	$0.00
October 2008 R	28	$100.00	$0.00	$0.00	$100.00	$0.00

Receipt #	Amount	Date	Status	Pay Type	Ref #	Image?
82	$500.00	12/1/2008	OK	CHECK		N/A

Return Allocation	Account	Amount	Interest	Penalty	Tax	Fees
October 2008 AU	23	$50.00	$0.00	$0.00	$50.00	$0.00
June 2008 R	24	$15.00	$0.00	$15.00	$0.00	$0.00
September 2008 R	24	$100.00	$0.00	$0.00	$100.00	$0.00
September 2008 R	26	$100.00	$0.00	$0.00	$100.00	$0.00
October 2008 R	26	$50.00	$0.00	$50.00	$0.00	$0.00
September 2008 R	27	$100.00	$0.00	$0.00	$100.00	$0.00