Tax Collector for Polk County Excise

Taxpayer Guide
Management Companies

Tax Collector for Polk County

Post Office Box 2016

Bartow, FL 33831

INTRODUCTION

Tax Collector for Polk County is happy to announce the switch to Excise for our Tourist Development payments.

Logging into the Excise System

Individuals

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

1. Access the county Excise site via the following address:
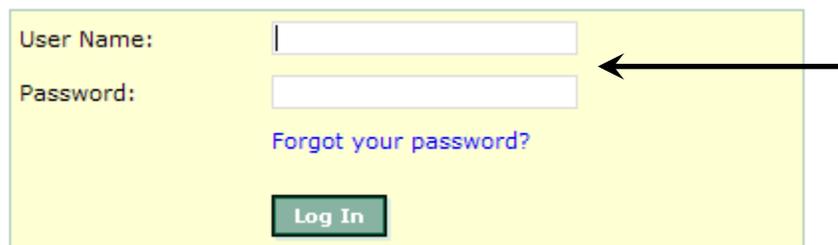
https://excise.ptghome.com/PolkTDT/default.aspx

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

3. **For existing users, you have been pre-registered user name is your existing Tourist Development account number and temporary password is Polk1234!**

4. Click **Log In**.

Tax Collector for Polk County

5. For New Users Contact our office for registration information.

Navigating through the Taxpayer Home Screen

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

You will know you are a management company, if it says you have sub accounts.

How to look at your sub accounts

1. Click on View Sub Accounts

2. To see your whole list, you can export to Excel.

3. To add or delete your subaccounts, please contact our office at (863) 534-4700 or via email at TDT@polktaxes.com

Sub Account Info - WONDER WOMAN

Accounts Managed by 100000002 - WONDER WOMAN

#	Account #	Name	Address	Owner	
1	106064	DIANNA PRINCE *	111 ANY STREET DAVENPORT, FL 33897 unit 0	DIANNA PRINCE	Edit

Click and Drag rows up or down to change account position in subreturn display.
Click Edit next to a row to change a nickname for an account
* - Indicates the listing is a nickname chosen by the management company, hover mouse over the name to see the actual account name.

Export to Excel

Tax Collector for Polk County

Menu Items

The Menu on the left of the screen allows you to perform the following functions:
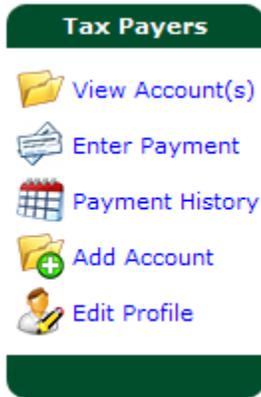
- o **View Account(s)** will bring you back to the Home Page.
- o **Enter Payment** will allow you to go straight to the payment screen to pay any outstanding taxes on submitted returns.
- o **Payment History** will allow you to view prior payments made within the Excise System.
- o **Add Account** will allow you to add a new account. (Note: this option may not be available in all taxing districts).
- o **Edit Profile** allows you to make changes to your contact and login information including changing your password.

Account Information at a Glance

The Home screen gives you a brief overview of basic Account information.

WONDER WOMAN - Account #100000000

Account	Name	Property Address 1/1	Status	Balance Due
View	WONDER WOMAN	207 DILLON ST WINTER HAVEN, FL 33880	Active Account	$0.00

Return Period	Due By	Allowance	Due	Paid	Balance Due	Status
June 2021 R	7/20/2021	$0.00	$0.00	$0.00	$0.00	Active

1. You can view the Account Name, Property Address, the Status of the account, as well as any outstanding balances due or credits available.
2. You can view any outstanding returns due, as well as the next future return due.

VIEWING/EDITING USER PROFILE AND LOGIN INFORMATION

Viewing/Editing Account Information

You have the ability to view 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.

SUBMITTING TAX RETURNS AND PAYMENTS

You have the ability to complete your tax return and submit it to the Tax Collector's Office. You will also be able to view your payment history from your secure login.

Completing a Tax Return

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

1. From the Home screen, select a Tax Return from your Account view.

WONDER WOMAN - Account #100000002					
Account	**Name**	**Property Address 1/1**		**Status**	**Balance Due**
📁 View	WONDER WOMAN	1508 MAIN ST E LAKELAND, FL 33801		Active Account	$0.00
		View 1 Sub Accounts			

Return Period	Due By	Allowance	Due	Paid	Balance Due	Status
📄 June 2021 R	7/20/2021	$0.00	$0.00	$0.00	$0.00	Active

Result: The enter Tax Return window and a list of your sub accounts will appear.

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

You do not need to enter anything in these boxes

#	Acct#	Managed Account Name	Gross Receipts	Exempt Receipts
1	106064	DIANNA PRINCE	1500.00	0.00

Enter the **Gross Rental Receipts and exemptions** for each of your sub account. The gross rentals receipts will automatically populate.

Return Item	Calculated
1. Gross Rental Receipts:	1,500.00
2. Exemptions:	0.00
3. Taxable Rental Receipts:	1,500.00
4. Total Tax: 5%: ☐ Override	75.00
5. Less - Collection Allowance:	1.88
6. Plus Penalty: :	0.00
7. Plus Interest:	0.00
Total Amount Due:	73.12

Instructions for completing tax return:

1. Gross Rental Receipts: Enter the total amount of rentals collected for the period, including but not limited to room rental charges (long and short term), cleaning fees, roll-away beds, and cribs. Do not include taxes collected.
2. Exempt Rental Receipts: Enter any rental receipts not subject to the Tourist Development Tax, including but not limited to receipts received from a tax exempt organization as evidenced by a **Florida sales tax exempt certificate** and receipts from a **bona fide written** long term lease as defined in Florida Administrative Code 12A-1.061(15) for a period longer than 6 months.

Your tax will now be calculated by our system.

Please note: per Florida Statutes, all taxes collected in excess of 6% must be remitted.

If you submit and pay your return online by the 20th of the month following the reporting period you will be entitled to a collection allowance of 2.5% of the first $1,200.00 of taxes collected.

If your return is submitted and paid late you will be assessed a penalty of 10% of taxes collected or $50.00, whichever is greater,

2. Check over your return for the correct period, account # and amounts.

3. Click the **Submit** button.

    Result: The payment screen appears.

4. **All payments are required to be made in full and online.**

WONDER WOMAN - Account #100000000 (Active Account)						
Return Period	**Due By**	**Allowance**	**Due**	**Paid**	**Balance**	**Payment Amount**
June 2021 R	7/20/2021	$1.88	$73.12	$0.00	**$73.12**	73.12

Please Select a Payment Option below.

Balance Due: (Mail) $0.00
Balance Due: (OnLine) $73.12

Payment being applied: $73.12

Click Here to Return to the Main Screen Without Making a Payment
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

Click Here to Schedule an Online Payment Now
You can pay online via ECheck by clicking this option.

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

   Result: The **Pay Online by Electronic Check or Credit Card** appears

6. Enter in the requested information and click **Submit**.

   Result: A payment confirmation screen will appear and you will receive a Payment confirmation email.

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

8. Click **Pay Later** to save your return information. This allows for you to return later to pay.

Viewing Payment History

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

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

    Result: The payment history screen appears.

Receipt #	Amount	Date	Status	Pay Type	Ref #		Image?
205	$123.29	2/1/2007	OK	ECHECK	ACCT#: *5437 TID: test1234		N/A

Return Allocation			Account	Amount	Interest	Penalty	Tax
January 2007 R			33	$123.29	$0.00	$0.00	$123.29

Receipt #	Amount	Date	Status	Pay Type	Ref #		Image?
204	$72.48	2/1/2007	OK	ECHECK	ACCT#: *5767 TID: test1234		N/A

Return Allocation			Account	Amount	Interest	Penalty	Tax
January 2007 R			32	$72.48	$0.00	$0.00	$72.48