



Ministry of
Finance

TACS updates may become outdated and are intended for Reference Use only. Please verify the publish date in the footer and check with your TACS Ministry Team Lead to confirm any changes in processes or procedures.

Managing PBA Accounts

Updated: March 16, 2017
Published: February 7, 2017
Proprietary and Confidential – Do not disclose

1 | Page





TACS updates may become outdated and are intended for Reference Use only. Please verify the publish date in the footer and check with your TACS Ministry Team Lead to confirm any changes in processes or procedures.

Table of Contents

INTRODUCTION.....	3
Getting There	4
Account Level.....	4
Folio List	6
Update Folios and Mail Codes	7
Making a Payment with a PBA account.....	8
Account Payment	9
Direct Payments on Folios	10
Position at the Period Level	10
I WANT TO – Direct a Payment on Folios.....	11
Confirmation	12



TACS updates may become outdated and are intended for Reference Use only. Please verify the publish date in the footer and check with your TACS Ministry Team Lead to confirm any changes in processes or procedures.

Introduction

In this tutorial you will learn how to manage a Property Bulk Administration (PBA) Account.

The PBA account will:

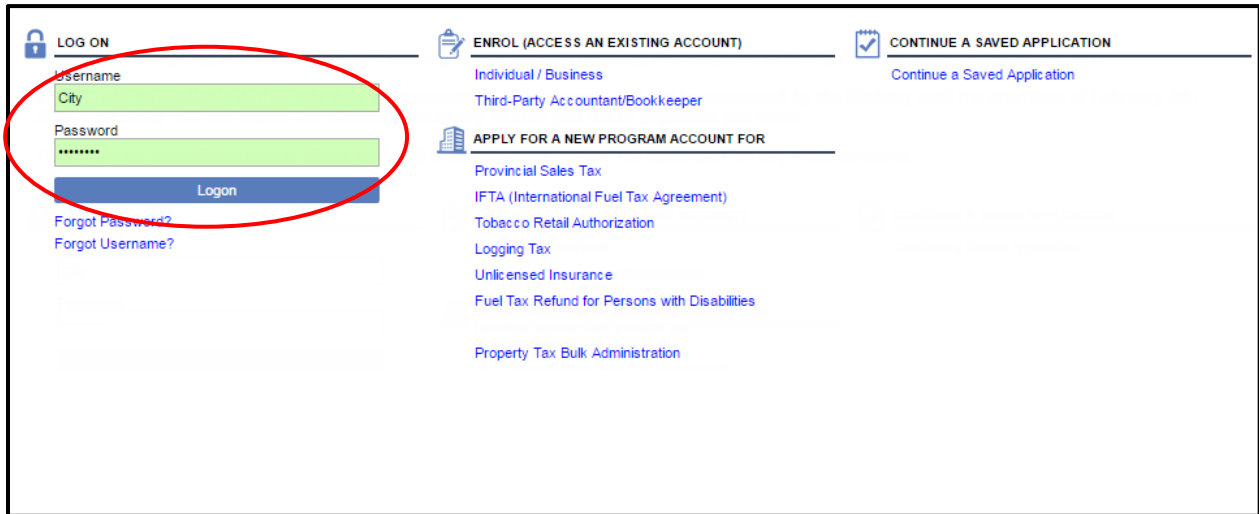
- ✓ Allow property owners with bulk mail codes to view a summary of their folios on eTax (bulk listing)
- ✓ Allow property owners with bulk mail codes to make a payment to some or all of their folios on eTax (bulk listing + MTPS)



TACS updates may become outdated and are intended for Reference Use only. Please verify the publish date in the footer and check with your TACS Ministry Team Lead to confirm any changes in processes or procedures.

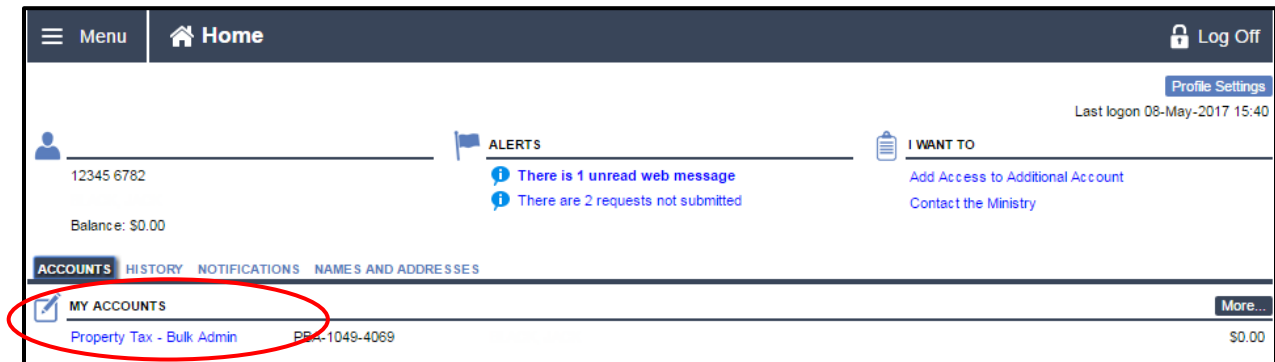
Getting There

From the eTaxBC LOG ON window, log in to your eTaxBC profile.



Account Level

Navigate to the Property Tax – Bulk Admin account. In this example, it’s account PBA-1049-4069.





TACS updates may become outdated and are intended for Reference Use only. Please verify the publish date in the footer and check with your TACS Ministry Team Lead to confirm any changes in processes or procedures.

On the **Account** window, you can see the active **Periods**, **Make a payment**, **Update Folios and Mail Codes**, and **Close This Account** under the **I WANT TO** section.

The screenshot shows the TACS account management interface for account PBA-1049-4069. The top navigation bar includes 'Menu', 'Home', and the account name. Below this, there are three main sections: 'ACCOUNT', 'ACCOUNT ALERTS', and 'I WANT TO'. The 'ACCOUNT' section shows 'Property Tax - Bulk Admin' and a balance of \$0.00. The 'I WANT TO' section contains links for 'Make a payment', 'Contact the Ministry', 'Update Folios and Mail Codes', and 'Close This Account'. Below these sections is a 'PERIODS' section with a table listing tax periods. A 'More...' button and a 'Filter' button are also present.

PERIODS HISTORY NOTIFICATIONS NAMES AND ADDRESSES LOGONS FOLIO LIST

If you want to specify the amount of tax you are paying for each folio, select the period and then click on Direct Payments on Folios in the top right corner.

The property tax due date is July 2nd or the next business day. Any amount outstanding after the due date, including any unclaimed home owner grant amounts, is subject to the following penalties:
 - 5% penalty added after the July due date, and
 - additional 5% penalty added after October 31.
 If the folio has a farm land due date extension, a 10% penalty is applied to the unpaid account balance after the October 31 due date.

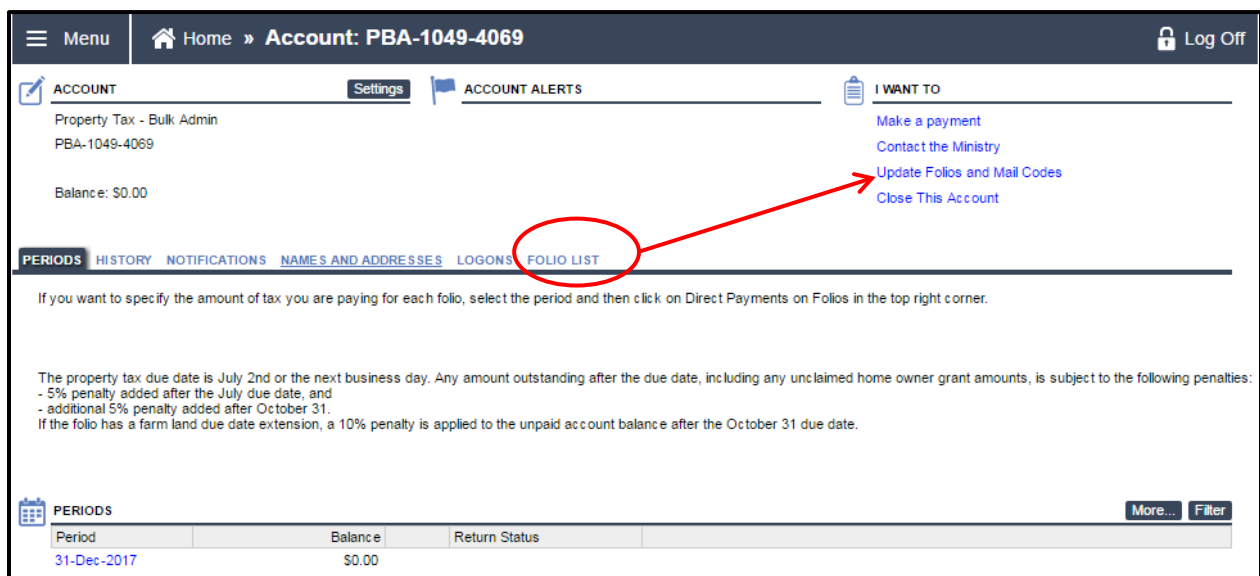
Period	Balance	Return Status
31-Dec-2017	\$0.00	



TACS updates may become outdated and are intended for Reference Use only. Please verify the publish date in the footer and check with your TACS Ministry Team Lead to confirm any changes in processes or procedures.

Folio List

Position on the **FOLIO LIST** tab at the **Account** level to see the folios associated with your Bulk Mail Code. If you want to **Add** or **Update** your Bulk Mail Code(s) click on the **Update Folios and Mail Codes** hyperlink within the **I WANT TO** section.



Menu Home » Account: PBA-1049-4069 Log Off

ACCOUNT Settings ACCOUNT ALERTS I WANT TO

Property Tax - Bulk Admin
PBA-1049-4069
Balance: \$0.00

Make a payment
Contact the Ministry
Update Folios and Mail Codes
Close This Account

PERIODS HISTORY NOTIFICATIONS NAMES AND ADDRESSES LOGONS **FOLIO LIST**

If you want to specify the amount of tax you are paying for each folio, select the period and then click on Direct Payments on Folios in the top right corner.

The property tax due date is July 2nd or the next business day. Any amount outstanding after the due date, including any unclaimed home owner grant amounts, is subject to the following penalties:
- 5% penalty added after the July due date, and
- additional 5% penalty added after October 31.
If the folio has a farm land due date extension, a 10% penalty is applied to the unpaid account balance after the October 31 due date.

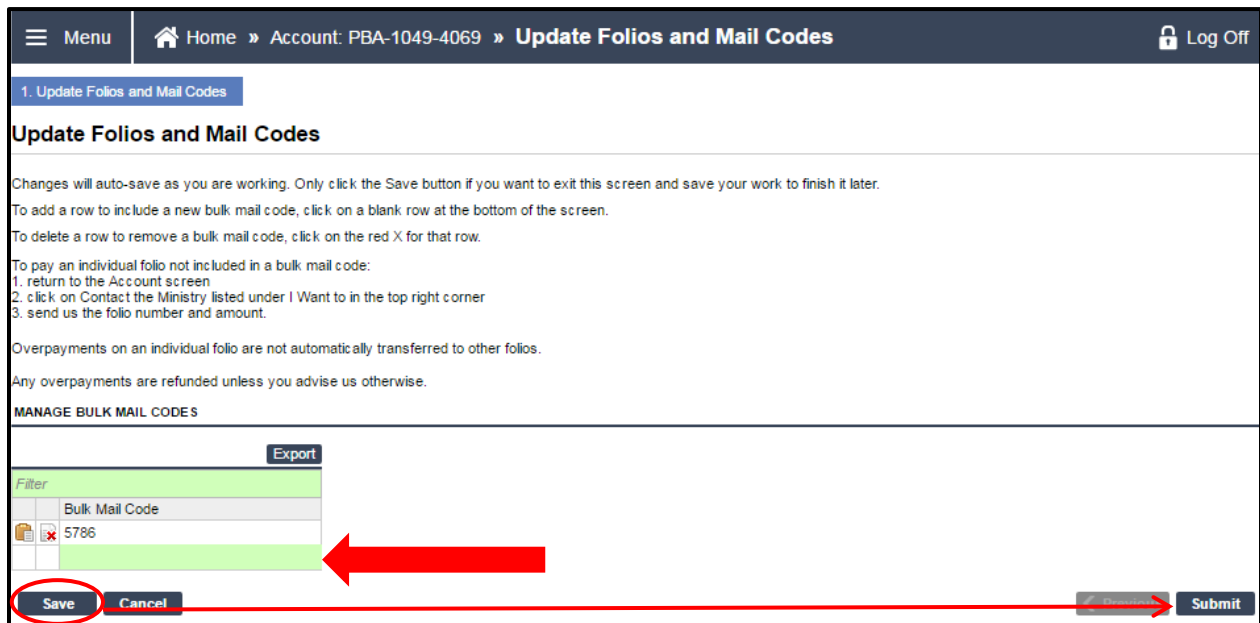
PERIODS More... Filter

Period	Balance	Return Status
31-Dec-2017	\$0.00	

TACS updates may become outdated and are intended for Reference Use only. Please verify the publish date in the footer and check with your TACS Ministry Team Lead to confirm any changes in processes or procedures.

Update Folios and Mail Codes

Position within the **Bulk Mail Code** field, and then enter the four-digit Bulk Mail Code. Once entered select the **Save** button and then the **Submit** button to save the changes.




Menu Home » Account: PBA-1049-4069 » Update Folios and Mail Codes Log Off

1. Update Folios and Mail Codes

Update Folios and Mail Codes

Changes will auto-save as you are working. Only click the Save button if you want to exit this screen and save your work to finish it later.
To add a row to include a new bulk mail code, click on a blank row at the bottom of the screen.
To delete a row to remove a bulk mail code, click on the red X for that row.
To pay an individual folio not included in a bulk mail code:
1. return to the Account screen
2. click on Contact the Ministry listed under I Want to in the top right corner
3. send us the folio number and amount.
Overpayments on an individual folio are not automatically transferred to other folios.
Any overpayments are refunded unless you advise us otherwise.

MANAGE BULK MAIL CODES

Filter	Bulk Mail Code
	5786

Export

Save Cancel Export Submit



Ministry of
Finance

TACS updates may become outdated and are intended for Reference Use only. Please verify the publish date in the footer and check with your TACS Ministry Team Lead to confirm any changes in processes or procedures.

Making a Payment with a PBA account

You can make a payment through eTaxBC for Bulk Account Codes. The first time you set up a Payment Channel, you will be prompted to sign the Pre-Authorized Debit (PAD) Agreement. Please see the Ministry of Finance FAQs on the [website](#) to read more about PAD payments. The information in the screenshots is fictitious data.



TACS updates may become outdated and are intended for Reference Use only. Please verify the publish date in the footer and check with your TACS Ministry Team Lead to confirm any changes in processes or procedures.

Account Payment

Enter the **Branch Number**, **Institution Number**, and the **Account Number**. The **Bank Name** will auto populate based on this information. Enter the **Amount** of the payment and click **Submit**.

Menu | Home » Account: PBA-1049-4069 » Account Payment | Log Off

<p>PROPERTY TAX - BULK ADMIN</p> <p>PBA-1049-4069</p> <p>2001 DOUGLAS ST VICTORIA BC V8T 4K9</p>	<p>PAYMENT CHANNEL</p> <p>See example</p> <p>Branch Number <input type="text" value="99560"/></p> <p>Institution Number <input type="text" value="004"/></p> <p>Bank Name <input type="text" value=""/></p> <p>Account Number <input type="text" value="1234567"/></p> <p>Confirm Account Number <input type="text" value="1234567"/></p> <p>Use default name <input type="radio"/> No <input checked="" type="radio"/> Yes</p> <p>Name THE TORONTO-DOMINION BANK - *4567</p>	<p>PAYMENT</p> <p>Payment Type <input type="text" value="Account Payment"/></p> <p>Period <input type="text" value=""/></p> <p>Payment Date <input type="text" value="08-May-2017"/></p> <p>Amount <input type="text" value="10,000.00"/></p> <p>Confirm Amount <input type="text" value="10,000.00"/></p>
---	--	---

PRE-AUTHORIZED DEBIT (PAD) AGREEMENT

When you created this payment channel you agreed to the terms and conditions of the Pre-Authorized Debit Agreement. You can review that agreement here:
[Pre-Authorized Debit Agreement](#)

PAYMENT PROCESSING

You have selected **May 8, 2017** as the payment date for this payment. Per CPA rules, we cannot process this payment until **May 11, 2017**. Your payment will be posted to your account on the payment date you have selected, **May 8, 2017**.

I hereby authorize the Ministry of Finance, British Columbia to debit my account for the amount of \$10,000.00 on May 11, 2017.





TACS updates may become outdated and are intended for Reference Use only. Please verify the publish date in the footer and check with your TACS Ministry Team Lead to confirm any changes in processes or procedures.

Direct Payments on Folios

After the payment amount has been submitted, you need to direct the payments on folios.

Position at the Period Level

Once positioned at the **Account** level, click on the **Period** hyperlink.

The screenshot shows the TACS web interface for account PBA-1049-4069. The account details include: Property Tax - Bulk Admin, PBA-1049-4069, BLACK, JACK, and a balance of (\$10,000.00). The 'PERIODS' tab is selected, showing a table with one entry: 31-Dec-2017 with a balance of \$0.00. This entry is circled in red.

Period	Balance	Return Status
31-Dec-2017	\$0.00	





TACS updates may become outdated and are intended for Reference Use only. Please verify the publish date in the footer and check with your TACS Ministry Team Lead to confirm any changes in processes or procedures.

I WANT TO – Direct Payments on Folios

Once positioned on the **Period** level, click on the **Direct Payments on Folios**.

Menu Home » Account: PBA-1049-4069 » 31-Dec-2017 Log Off

PERIOD
31-Dec-2017
Property Tax - Bulk Admin
PBA-1049-4069
Balance: \$0.00

PERIOD ALERTS

I WANT TO
[Make a payment](#)
[Contact the Ministry](#)
[Direct Payments on Folios](#)

SUMMARY
There has been no financial activity

PERIOD ACTIVITY
 08-May-2017 Not Submitted [PBA Direct Payment](#)
 08-May-2017 Not Submitted [PBA Direct Payment](#)
 01-Jan-2017 Not Submitted [PBA Direct Payment](#)

- The folios associated with the Bulk Mail Code will display in a list. Select the **(A) Gross Tax**, **(B) Regular**, **(C) Additional** or **Other** depending on the payment amount for each folio. Once completed, click the **Submit** button.

Menu Home » Account: PBA-1049-4069 » 31-Dec-2017 » PBA Direct Payment Log Off

PAYMENT DIRECTIONS FOR THE PROPERTY TAX BULK ADMINISTRATION (PBA) ACCOUNT

This list only displays folios with an amount due by the indicated due date or the next business day. The amounts in columns A, B and C may differ based on home owner grant eligibility. **Your payment must match the Total Payment Due.** If your payment does not match, it may cause delays and penalties may apply. Your work will auto-save as you complete it.

Total Payment Due Export

Folio Id	Owner Name	(A) Gross Tax	(B) Regular	(C) Additional	A	B	C	Other	Payment	Legal Description	Bulk Code
727 049121.000		14.20	14.20	14.20	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	14.20		5786
727 049109.000		19.33	19.33	19.33	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	19.33		5786
727 049106.000		12.24	12.24	12.24	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	12.24		5786
727 049115.000		723.56	350.00	100.00	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	723.56		5786
727 049128.000		12.84	12.84	12.84	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	12.84		5786
727 007697.000		63.30	63.30	63.30	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	0.00		5786
727 003929.100		15.25	15.25	15.25	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	15.25		5786

Submit **Save and Finish Later** **Cancel**





TACS updates may become outdated and are intended for Reference Use only. Please verify the publish date in the footer and check with your TACS Ministry Team Lead to confirm any changes in processes or procedures.

Confirmation

Once the **Submit** button has been selected you will be positioned on the **CONFIRMATION** page. This page will give you a brief description of your request, an estimated time when the request will be processed and a Confirmation Number. If you would like your confirmation printed, select the **Print Confirmation** button. Select the **OK** button.

Menu Home » Account: PBA-1049-4069 » 31-Dec-2017 » PBA Direct Payment » Confirmation Log Off

CONFIRMATION

Confirmation

Your PBA Payment Directions have been submitted and your confirmation number is 0-022-380-544. You can review or change this request until it is processed. We estimate that this request will be processed at the end of the next business day.

Please include your PBA account number (shown below) when paying by cheque or EFT.

Request Information

Status	Pending
Confirmation Number	0-022-380-544
Logon	jack99
Name	BLACK, JACK
Property Tax - Bulk Admin	PBA-1049-4069
Period	31-Dec-2017
Submitted Date	08-May-2017 16:11:09
Total Payment Due	748.64

Ok Print Confirmation

If you have any question please contact the Surveyor of Taxes office in Victoria (250) 356-5495 toll free at 1 888-355-2700 and request a transfer to (250) 356-5495.

