

# Rebate Reports

## Rebate Worksheet

Refer to  [Case 9597](#)

### Opening and Analyzing

Let's open the Rebate Worksheet.

From the "Edit Rebate" form, click the "Rebate Worksheet" button on the bottom underneath the "Tax Payment Details" subform.

The "Rebate Worksheet" will appear as a report.

#### The Rebate Worksheet:

Where numbers are assigned in the picture, read the details for each section where the numbers relate.

1. Owner information, rebate information
2. Original, corrected, and reduced assessment values and their totals
3. Each tax payment detail record and how the rebate amount for each tax bill was calculated. Can be verified by the user by completing the calculations displayed left to right.
4. The running totals of the individual school, county, and municipal rebate amounts along with the sum of all three for a total rebate amount.

July 23, 2021 12:52 PM

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**Rebate Worksheet**

Control #: 109150  
 Tax Map #: 21-0-0001-0002.0004  
 Begin Date: 1/1/2015 - End Date: 6/30/2016  
 Reason for Rebate: tree collapsed roof, storm damage - edited on 7/23

**1**

Original Assessment	Corrected Assessment	Reduction
Land: \$31,700	- \$31,700	= \$0
Improvement: \$140,500	- \$128,000	= \$12,500
Total: \$172,200	- \$159,700	= \$12,500

**2**

Tax Year	Tax Type	Reduction	Millage	Pmt Period	Days Subject	Rebate Amount
2014	School	\$12,500	x (15.4186 / 1000)	x 0.98 (2% discount)	x 181/365	\$93.66
2015	County	\$12,500	x (3.7100 / 1000)	x 1.00 (paid at face)	x 365/365	\$46.38
2015	Municipal	\$12,500	x (0.9000 / 1000)	x 1.00 (paid at face)	x 365/365	\$11.25
2015	School	\$12,500	x (15.9808 / 1000)	x 1.1 (10% penalty)	x 366/366	\$219.74
2016	County	\$12,500	x (3.7100 / 1000)	x 0.00 (not paid)	x 182/366	\$0.00
2016	Municipal	\$12,500	x (0.9000 / 1000)	x 0.00 (not paid)	x 182/366	\$0.00
2016	School	\$12,500	x (16.3643 / 1000)	x 0.98 (2% discount)	x 0/365	\$0.00

**2****3**

**4**

School Total Rebate:	\$313.40
County Total Rebate:	\$46.38
Muni Total Rebate:	\$11.25
<b>Full Total Rebate:</b>	<b>\$371.03</b>

**Payment Periods and Days Subject****Payment Periods:**

For the sake of demonstrating the rebate worksheet, the payment periods for our scenario have been varied (previously, they were all entered as "Discount").

Let's look at how each payment period type affects the values on the "Rebate Worksheet."

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2016	School	\$12,500	x (16.3643 / 1000)	x 0.98 (2% discount)	x 0/365	\$0.00

The payment period exists as a number with a decimal whose value changes depending on which payment period was selected. For instance, a payment period of "face" will always be 1.00, as no penalty nor discount exist. A payment period of "not paid" will always be 0.00.

For the school tax year of 2015, the penalty percentage is 10%; therefore, the "Pmt Period" value we multiply by is 1.1, which adds the penalty to the running number. The same is true for the 2% discount, except its value exists as the percentage amount less the value of 1.00.

## Days Subject:

The "Days Subject" column signifies the number of days in the tax year per tax type subject to the rebate's scope.

For the school bill in 2014, we can see that the running number is multiplied by the operation, 181 divided by 365.

This means, that since our rebate started January 1st, 2015, we are accounting for the days within the 2014 school bill that the rebate takes effect on (which would be January 1st - June 30th of 2015).

The days in the 2014 school bill between July 1st, 2014 and December 31st, 2014 are not subject to the rebate, so they are excluded from the operation.

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2016	Municipal	\$12,500	x ( 0.9000 / 1000 )	x 0.00 (not paid)	x 182/366	= \$0.00
2016	School	\$12,500	x ( 16.3643 / 1000 )	x 0.98 (2% discount)	x 0/365	= \$0.00

## Rebate Letter

Refer to  Case 9606

## Opening and Analyzing

Generate a rebate letter with the rebate amounts to be sent to the taxing districts.

From the "Edit Rebate" form, click the "Rebate Letter" button on the bottom underneath the "Tax Payment Details" subform. The "Rebate Letter" will appear as a report.

### The Rebate Letter:

Where numbers are assigned in the picture, read the details for each section where the numbers relate.

1. The header - recipient's address
2. Property owner(s)' information
3. Corrected amounts/Rebate amounts

## Wayne County Board for the Assessment and Revision of Taxes

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TWP.  
WENDELL KAY, SOLICITOR

WAYNE COUNTY COURT HOUSE  
925 COURT STREET  
HONESDALE, PA 18431-1996  
570-253-5970 EXT. 4010 FAX: 570-253-5418

JOHN MCCORMICK  
CHIEF ASSESSOR, CPE  
CHERYL DAVIES  
DIRECTOR, CPE

July 23, 2021

WAYNE COUNTY COURTHOUSE  
925 COURT STREET  
HONESDALE, PA 18431  
████████████████████████████████

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### REBATE

The following property owner(s):

Tax Map #: 21-0-0001-0002.0004 Control #: 109150  
County: WAYNE COUNTY, PA  
School District: WAYNE HIGHLANDS SCHOOL DISTRICT  
Municipality: PROMPTON BOROUGH  
Mailing Address: WOLFE MICHAEL J & ALLISON M  
92 RIVER RD  
PO BOX 12  
PROMPTON, PA 18456-0012

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are to be rebated the correct amounts below. Please refer to the enclosed Rebate Worksheet.

Rebate Reason: tree collapsed roof, storm damage - edited on 7/23

County/Municipal Tax Year	School Tax	County Rebate	Muni Rebate	School Rebate
	2014 - 2015	---	---	\$93.66
2015	2015 - 2016	\$46.38	\$11.25	\$219.74
2016	2016 - 2017	\$0.00	\$0.00	\$0.00
Rebate Totals:		<b>\$46.38</b>	<b>\$11.25</b>	<b>\$313.40</b>

*John McCormick*

JOHN MCCORMICK  
Chief Assessor

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## Report Types

At the bottom of the "Rebate Letter" report window, you should see a "Page" selector.

Clicking the right arrow will cycle through the three pages that should be returned.  
Each page is a separate report for each of the taxing districts:

- Page 1 is the County Rebate
- Page 2 is the Municipal Rebate
- Page 3 is the School Rebate

As you cycle through the reports, you will notice the relevant values will be in bold.

*Also, the recipient's address changes based on which taxing district the report is for.*

## Finalizing a Rebate

*Caution: finalizing the rebate prevents you from directly editing the rebate from the "Edit Rebate" table. You can still amend a rebate, though.*

The last step in the rebate process is to finalize the rebate. Here's how:

1. Open the rebate letter from the "Edit Rebate" form and ensure accurate details.
2. Close out of the report. You will see the following prompt: "**Did the letter print correctly?**"
  1. *On clicking "No," the prompt disappears, and the "Edit Rebate" form will be visible with no changes.*
3. If the letter has been printed correctly and you are ready to finalize the rebate, **click "Yes."**
4. After clicking "Yes," you will notice that the "Edit Rebate" form refreshes, and you can no longer make changes to the rebate as the controls are locked.
5. Underneath the "Rebate Letter" button in the "Edit Rebate" form, you will find a text that reads, "Letter Sent On: " with the current date next to it. This date is recorded as the day a user finalized and sent out the rebate letter to the taxing districts for record purposes.

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