

FILE ELECTRONICALLY – BUSINESS

Getting started:

1. Click: “Login” and a screen will appear. Enter account number, password and all other information requested. Click “Continue”.
2. A screen requesting general information will appear. Please complete blank fields, answer all questions, and make any necessary corrections to existing data displayed. When complete, click “Save & Continue”.

Note: “Help” or “Current Return” can also be viewed or printed from this page.

3. The next screen appearing, displays a list of your assets on Charlotte County’s Tangible Personal Property Tax Roll.


Note: There may be more than 1 page and some line items may be “groupings” of similar assets. Be sure to read instructions first and “Help” screen if needed. You can print a return with assets on the roll prior to changes by clicking “Current Return” at bottom of screen.

- a. To change existing data without deleting items, click on the appropriate field & make change. Click “Update” at lower left of equipment list. To delete items, see 4c below.
- b. To make equipment additions, click on **+** at bottom left or right of equipment list. Select proper class of property, key in description, quantity, etc. and continue across the line. When line is complete, click on **✓** to save. Continue adding property by line until all items reported for the first time are listed. Then click “Update” at lower left of equipment list. If there are no items to be removed, click “Continue”. If you need to remove items, **do not** click “Continue” and see 4c below.
- c. To delete assets physically removed during previous year, click on “Removed/Sold” button at far right of the line item to be removed or adjusted.

Note: You may have physically removed only a portion of the assets appearing on any one line. If so, be certain that the totals are adjusted, rather than deleted.

- (1) A window will appear. Be sure to answer all questions and change data shown to reflect removals. Provide specific description and number of items removed in “Notes”. If the quantity of items to be removed is more than the quantity listed, e.g.: 1 phone system was reported previously for \$1,000, but you remove 3 phones with an

original cost of \$300. Indicate in the “Notes” field that only 3 phones costing \$300 were removed. Click on “Save & Exit” button at bottom left. This takes you back to the “equipment” screen for additional changes if required.

- (2) The line item changed should now be highlighted yellow and say “Mod”, in the “Changed” column. Repeat previous steps as needed.
 - d. When all additions and changes have been made, click on “Update” button before continuing to the next page, which will be “Leased, Rented, Loaned Equipment”.
4. Leased, rented, loaned equipment (equipment held by you but belonging to others): If you have no equipment, etc. belonging to others in your possession, click “Continue”.
- a. **Note:** We understand many taxpayers may not know a lot of information concerning items that are leased, on loan or belong to others. Examples are display coolers, vending machines, etc. belonging to soft drink companies, ice cream companies, or others. Click the **+** button to list items on the screen and complete as much of the following information as possible.
 - (1) Name of owner/lessor.
 - (2) Address of owner/lessor.
 - (3) Description of item(s).
 - (4) Quantity.
 - (5) Year manufactured – if unknown, enter the number, 1.
 - (6) Rent per month – if unknown or inapplicable, enter the number, 1.
 - (7) Retail installed cost new (include sales tax, freight, and installation) - if unknown or inapplicable, enter the number, 1.
 - (8) Review “Purchase Option” and select appropriate choice. Choices are; No, \$1.00, 10%, FMV (Fair Market Value), or Other.
 - (9) Click on  to save this information.


- b. If leased, rented, loaned equipment previously in your possession was removed or sold prior to the most recent January 1, add items as instructed previously under 5a. Then click on the “Removed/Sold” button at far right of line.
 - (1) A window will appear requesting information. Please provide as much information as possible concerning the item’s disposition.
 - (2) If item was purchased, go to the screen’s “Notes” field and type in description of item(s), date of purchase and amount taxpayer paid, then click the “Save & Exit” button.

Note: Any furniture, fixtures, or equipment formerly leased that has been purchased by the taxpayer, should be reported as furniture, fixtures, and equipment owned by the taxpayer in years subsequent to their purchase.

- c. When all data additions and changes have been made, click on the “Update” button before clicking “Continue” to reach the next screen, “Equipment Leases”.

5. Equipment owned by you but rented, leased or held by others:

- a. If the taxpayer is a leasing company or loans/rents equipment to others, or owns equipment at various locations, this section should be completed. For example, pool tables and video machines owned by you and loaned to others on a revenue sharing basis, vending machines, store fixtures placed to display your product, etc. If this section is not applicable click “Continue” to access the “Comments” screen.
- b. If you do own items in another’s possession, click the **+** button to list them on the screen and complete as much of the following information on as possible:
 - (1) Lease/Contract number – if inapplicable, enter the number, 1.
 - (2) Name of lessee.
 - (3) Address of lessee – physical location (street address, job site, project name, etc.).
 - (4) Description Description of item (John Deere 425, MRI, water cooler, pool table, vending machine, etc.).
 - (5) Quantity of items.
 - (6) Year manufactured - if unknown, enter the number, 1.

- (7) Year acquired.
 - (8) Rent per month – if inapplicable, enter the number, 1.
 - (9) Term – enter length of lease, 36 months, 5 years, etc.
 - (10) Estimate of fair market value.
 - (11) Condition.
 - (12) Retail installed cost new (including tax, freight and installation if applicable.).
 - (13) Purchase option – indicate if lessee has an option to buy the leased equipment and if so, at what cost. Choices are: No, \$1.00, 10%, FMV (Fair Market Value) or other.
- c. If equipment previously owned by you but held by others was removed or sold prior to the most recent January 1, add items as instructed in 6a above. Click on  to save, then click the “Removed/Sold” button at far right of line.
- (1) A window will appear requesting information. Please provide as much information as possible concerning the item’s disposition.
 - (2) If item was purchased by the lessee, go to the screen’s “Notes” field and type in description of item(s), date of purchase and amount lessee paid. If item was transferred, traded, or sold to someone other than lessee, provide the information on where it went, then click the “Save & Exit” button.
- d. When all data additions and changes have been made, click the “Update” button before clicking “Continue” to reach the next screen, “Comments”.
6. Comment screen – Enter any comment relative to this return or your account, then click on the “Save & Continue” button.
7. At this point, there are three choices:
- a. “Review Return” This button brings up the return’s current image after all additions/removals have been made and saved. The return can be viewed on-line or printed.
 - b. “File Return” or “File Amended Return”. If the “File Return” button is selected, the tax return will be electronically filed with the Property Appraiser’s office. The current date will be added to the return as the filing

date. The return can then be printed for the taxpayer's records. The "File Amended Return" button is only displayed if a return has already been filed for the current year. Amended returns should be filed to show any changes needed to correct the original filing for the current year.

- c. "Exit" this button closes the electronic filing program.