



I03-st-parm-Category Levies – Apply Levy

Feature in Govern V6

Release 6.0/6.1 Version 1

Last Revision Update: 2017/11/23

Version History

Version	Date	Modify By	Description
1.0	2016/06/01	Olusegun Olaniyan	Create document
1.1	2016/06/03	Olusegun Olaniyan	Update

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OVERVIEW

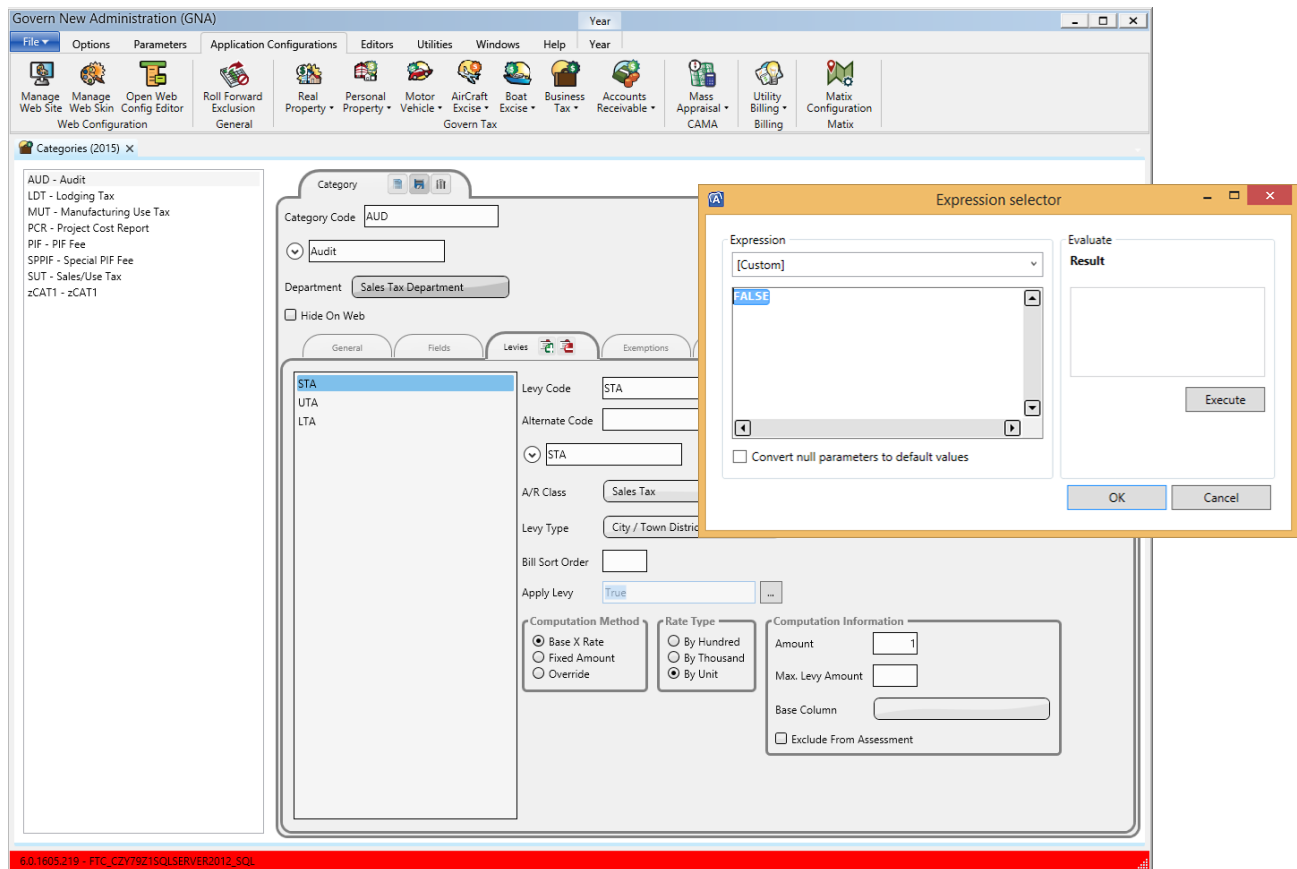
In Governs' Self-Reported Business Tax module, the Self-Reported Business Tax Categories form is used to create categories. In turn these Categories can have penalties and discounts added to them during a computation. The Apply Levy Expression feature enables users to apply Levies based upon a specified condition.

In the past

In releases prior to Govern 6.0.1606, when conditional application of levies were required, all permutations for the conditions that were required would also have to be created; an instance could be, If a city has 5 different categories. In addition this city takes filings for 5 different municipalities and each municipality can use different rates or A/R Class (for GL Distribution). In earlier releases of Govern, the City would have to create and maintain 25 categories. By being able to apply conditions with expressions, users can apply levies based upon the Boolean condition returned after evaluating the expression. Now when we create the code, we can add an expression that will state that if an attribute evaluates as TRUE for Municipality A, apply the levy; otherwise, i.e. FALSE, do not apply the levy.

The Enhancement

With this enhancement, when an expression is added to the Levies parameter, it is evaluated during the ST Compute process. When the expression returns a value of TRUE, a preset levy is applied. When the expression returns a value of FALSE, the levy will not be applied.



USER INTERFACE

The principal interface for applying this conditional is in the Business Tax Categories form.

Locating the Apply Levy parameter

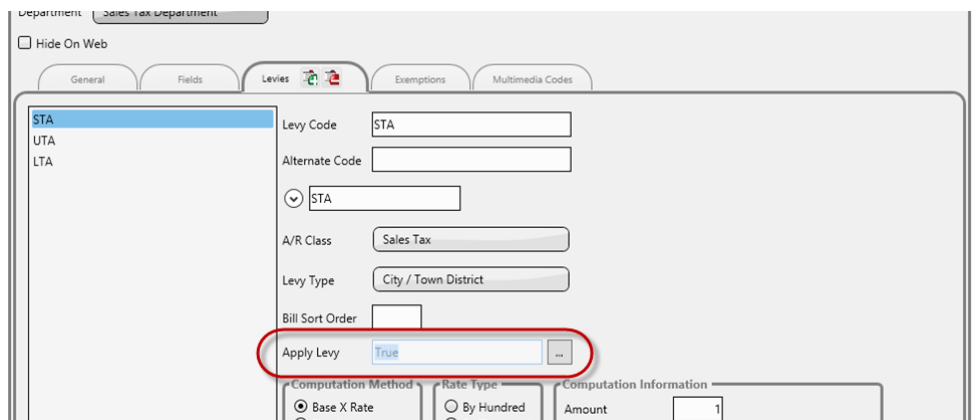
To access this form...:

1. Open the Govern New Administration (GNA)
2. On the ribbon, click the Application Configurations tab.

As is standard with the layout of Govern parameters, created levy codes are listed in the pane on the left hand side. A click on an available levy code will display its properties (i.e. parameter settings) on the right hand side of the interface.

3. Locate and click the Levies sub tab.
4. Below the *Bill Sort Order* parameter is the **Apply Levy** parameter.

NOTE: By default, the Apply Levy parameter is set to TRUE.



Department: Sales Tax Department

☐ Hide On Web

General Fields Levies Exemptions Multimedia Codes

STA UTA LTA

Levy Code: STA

Alternate Code:

STA

A/R Class: Sales Tax

Levy Type: City / Town District

Bill Sort Order:

Apply Levy: True

Computation Method: ☒ Base X Rate ☐ Fixed Amount

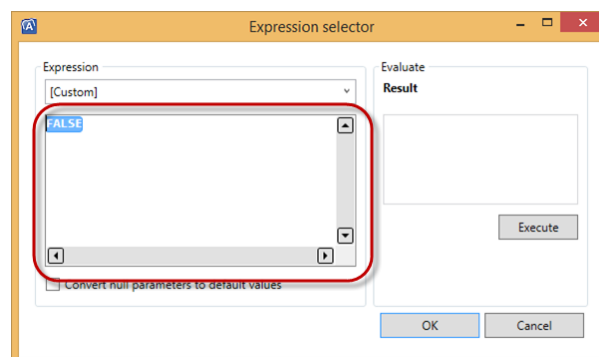
Rate Type: ☐ By Hundred ☐ Per Thousand

Computation Information: Amount: 1

Modifying the Apply Levy parameter

To modify the parameter...:

1. Locate and click the *Levies* sub tab.
2. Click on a levy category that is listed in the left hand pane.
3. On the right hand side of the form, below the *Bill Sort Order* parameter is the Apply Levy parameter.
4. Click the ellipsis button [...] beside the parameter to display the **Expression Selector**.
5. In the edit pane of the Expression Selector, highlight the condition and enter TRUE (default) or FALSE to not apply the Levy when the compute process is run.



Expression selector

Expression: [Custom]

FALSE

Convert null parameters to default values

Evaluate Result

Execute

OK Cancel

Example 1 (Basic)

As an example in a city with a municipality that has provisions for a Lodging Tax, there are three types of levies that can be applied in the category of lodging tax.

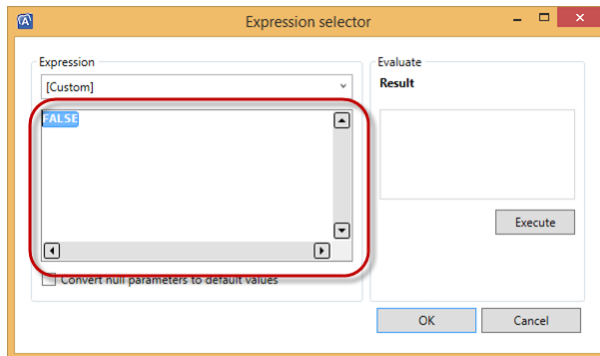
- Excise Tax – EXT_X
- Assessment Fee – AS_FEE
- Lodging Tax – LODG_TX

For the purpose of testing this feature in our example we will set the system to not apply the Lodging tax; currently all are applied, i.e. set to TRUE in the system, when the compute process is run. In order to not apply the Lodging Tax (LODG_TX), we will set the *Apply Levy* flag to **FALSE**.

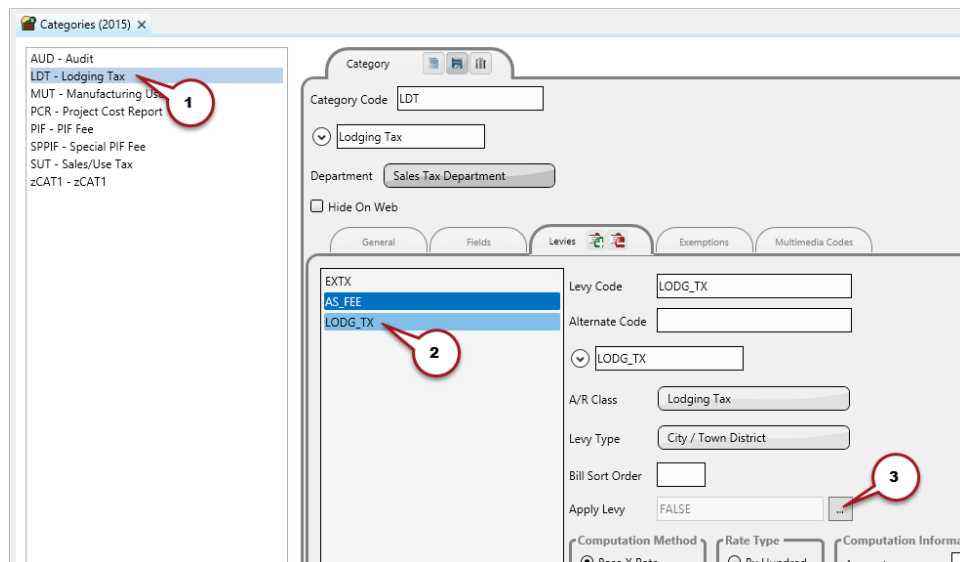
To modify the flag...

1. On the *Levies* sub tab, we will click on the Lodging Tax category in the left hand pane. (1)

2. The right hand pane has the list of codes that are associated with the category; click the Lodging Tax (LODG_TX) code. (2)



3. On the right hand side of the form, below the *Bill Sort Order* parameter is the **Apply Levy** parameter. (3)



4. Click the ellipsis button [...] beside the parameter to display the **Expression Selector**.
5. In the Expression selector form, change the flag to **FALSE**; as with the test of any expression click **Execute**. A result of **FALSE** should be displayed in the Result pane.
6. Click **OK** to confirm the change.
7. Click **Save the current item** on the main Category tab to confirm the change.

Results

The system has now been configured to not apply the *Lodging Tax (LODG_TX)* levy when the *ST Compute* process is run.

Applying an Expression

Example 2 (Intermediate)

In this example we will set up a condition that will not allow the application of the levy. We have a situation that if the amount entered in the category called *Gross Sale* is less than \$500.00, a levy should not be applied. Alternatively, any amount over \$500.00 will be subject to the application of a levy. For this example will use the following expression:

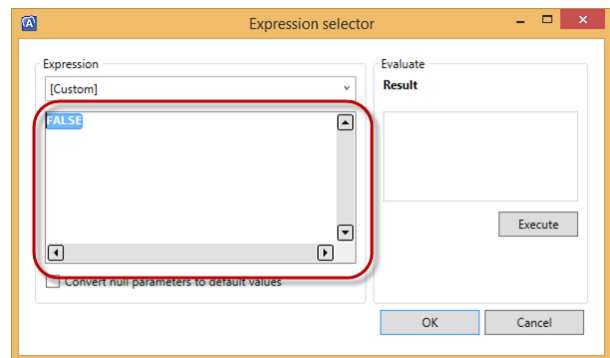
STEP 1: Design the Expression

IF (@attrGR_SAL < 500, FALSE, TRUE)

STEP 2: Apply the Expression

The next step is to locate the levy and apply the conditional to it.

1. Locate and click the *Levies* sub tab.
2. Click on a levy category that is listed in the left hand pane.
3. On the right hand side of the form, locate the Apply Levy parameter.
4. Click the ellipsis button [...] beside the parameter to display the **Expression Selector**.
5. In the edit pane of the Expression Selector, highlight the condition and enter your new expression.
IF (@attrGR_SAL < 500, FALSE, TRUE)
6. Click Execute to test the expression.
7. Click OK to save the expression.



Results

The system has now been configured to not apply the (**GR_SAL**) levy when the *ST Compute* process is run. It will be applied only if an amount that is over \$500.00 is entered, less than \$500.00 is not subject to a levy.

CONFIGURATION

Configuration in the Govern New Administration (GNA)

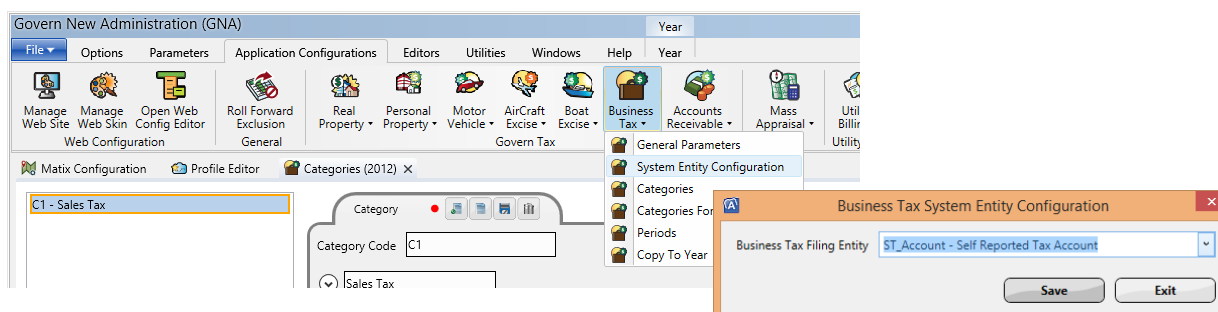
NOTE: As a rule administrators should always endeavor to have the latest versions of the two above files, but they are necessary for the functioning of the enhancement. These updates are performed in the *Govern New Administration (GNA)* using the **Import Data from File** utility in the *Import / Export Tools* group.

1. The latest version of the *OpenForms Reference* file (**FormReference.XML**)
2. A current version of the *Dynamic Search Reference* file (**DynamicSearchReference.XML**)

Business Tax System Entity Configuration

To set the Business Tax System Entity Configuration...

1. On the GNA ribbon click to select Application Configurations (tab).
2. Select *Business Tax* > **System Entity Configuration**.
3. In the Business Tax System Entity Configuration form, select **ST_Account – Self Reported Tax Account** from the combo box.
4. Click Save to confirm the setting.



Aside from the above setting of the Business Tax System Entity Configuration, and the *Apply Levy* flag (Table: **ST_PARM_LEVY.APPLY_LEVY_EXPRESSION**), no additional configuration is required.

APPENDIX A – Tables

The following tables are implicated in this enhancement:

- ST_PARM_LEVY
 - Column added APPLY_LEVY_EXPRESSION; setting – VARCHAR (MAX)