

Local Template Instructions

Locality Information Column by Column Instructions

- A. Enter locality name in cell A6. If you are a county, please include "County" in your name.
- B – E. Enter locality address information in cells B6 through E6.
- F. Enter locality telephone number or telephone number for designated third-party administrator that taxpayers may call for additional information in cell F6. (This will be listed on the Revenue Department's website.)
- G. Select the product from the drop-down menu. Different product types can be entered on lines 6 through 8. (One product per line.)
- H. Enter the rate of taxation for the product type shown in Column G. Complete lines 6 through 8, if applicable.
- I. If the local ordinance levies a tax in the police jurisdiction, enter the rate of taxation for each product type shown in Column G, lines 6 through 8.

Information for Revenue Department Only Row by Row Instructions

- 13. Enter the discount rate for your locality, if applicable, in cell B13.
- 14. Describe how your discount is computed in cell B14. For example, the discount is 2% of the gross tax due.
- 15 – 18. Enter information pertaining to your contact person in cells B15 through B18.
- 19. In cell B19 select "yes" or "no" from the drop-down menu to indicate if your locality will accept the ACH credit method of payment.
- 20. In cell B20, select "yes" or "no" from the drop-down menu to indicate if your local tax is administered by the state.
- 21. If applicable, enter the name of your third-party administrator in cell B21.
- 22. If applicable, enter the contact person of your third-party administrator in cell B22.
- 23. If applicable, enter the telephone number, including area code, of your third-party administrator in cell B23.
- 24. In cell B24, select who will receive information from the return and payment from the drop-down menu.
- 25. **County Only** Indicate if you collect and distribute a portion of your local tax to the municipalities in your county. If you distribute a portion of your local tax to the municipalities, provide details as to how the tax is collected and distributed in cell B25. In cell C25, provide a list of municipalities in your county that participate in this distribution.
- 26. **Municipalities Only** If you are in multiple counties, please list the names of the counties in cell B26.

Additional Information Row by Row Instructions

29 - 35. Please read each statement relating to a Third-Party Designee.

37. In cell B37, select “yes” or “no” from the drop-down menu to indicate if your locality agrees or disagrees with the statements listed on rows 30 through 35.

39. Enter the name and title of the person completing the template in cell B39.

40. Enter date you completed/submitted template to the Department in cell B40.