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How To Guide: File and Remit a Payment

August 2022

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Step 1: Visit the Tourist Development Tax home page

- Visit <u>www.pbctax.com</u>.
- Select "Other Taxes" in title bar
- Select "Tourist Development Tax"





Step 2: "Login to TDT Portal"

1. Read the How To Guides for each step.

2. When you are ready, click "Login to TDT Portal."



Driver License
Motor Vehicle & Vessel
Property Taxes
Other Taxes
Additional Services
Help & Resources
Help & Resources

About Tourist Development Tax

Tourist Development Tax (TDT) strengthens our local economy by supporting Palm Beach County's tourism industry. Anyone who offers accommodations for short term rental (six months or less) is required to collect Tourist Development Tax from the guest when rent or accommodation charges are collected. TDT is 6% of total taxable rental receipts. It is an add-on tax and must be paid in addition to state sales tax.



Palm Beach County Requirements

Anyone who offers accommodations for short term rental (six months or less) in Palm Beach County must establish a TDT account using our Tourist Development Tax portal. You must also fill out a Business Tax Receipt Application for Short Term Rentals for each rental unit.

All TDT returns and payments must be filed and remitted online using our Tourist Development Tax portal. Remember to check with your local municipality for additional business tax payment information and other requirements.

How To Establish a TDT Account

Please follow these steps to establish your TDT account:

Step 1: Determine how you will manage your property

Determine if your property will be self-managed, agent-managed or company-managed. Read Before Getting Started – Property Owners to learn more.

In This Section

Palm Beach County Requirements Establish a TDT Account BTR for Short Term Rentals File and Remit Payment Information for Agents TDT Registry TDT Exemptions

TDT Support Center

- Payment Options
- Online Forms



Frequently Asked Questions

Step 3: Login to select TDT access

- You will be redirected to the Palm Beach County Public Access Service Portal Home Page
- 3. Select Tourist Development Tax
- 4. Enter your Username and Password.

Click "Login."

If you have forgotten your password, click the **RESET PASSWORD LINK**



🔦 Return

You can now manage your TDT account, file returns and pay online using the TDT online portal.

If you are an existing user, enter your user name and password below and click "Login". If you are a new user you must register by clicking the "Register" button below.

| Username: | Username | |
|-----------|--------------|------|
| Password: | | 0 |
| | Login Car | ncel |
| | Login ber Lo | ain |

Please remember to avoid being assessed a penalty you are still required to file a return by the 20th of the following month, even if rental collections are zero.

Client Service Specialists are available weekdays 8:15 a.m. - 5:00 p.m. to answer your questions. Please call the TDT Hotline at (561) 355-3547 or email ClientAdvocate@pbctax.com.



Step 4: Access Your Account

1. Click "MY ACCOUNTS."

2. Select the account for which you want to file a return.

3. Click on the box with the + sign. This expands the account and reveals the tax year and filing periods.

- Tourist Development Tax Account Access **NEW TDT APPLICATION** + Apply for a new TDT account. Add a location/new TDT Account. **MY ACCOUNTS** File returns and pay Taxes.

File and Remit your taxes

- · Select the account for which you want to file a return to begin
- Open our user friendly HOW TO GUIDE File and Remit Taxes
- If you need more help visit the TDT Support Center
- Returns may be filed up to 6 months in advance, including \$0 Returns for no rental activity.
 Returns are due on the 1st and DELINQUENT after
- the 20th

| ASSIGN | Agent | • |
|--------|-------|---|
| | | |

Total records: 4

| K | 3 | > N | | | | | | | | 10 - |
|---|---|-----------|-----------------------------|-----------|---------------|------------------|------------|--------|--------|--------|
| Ø | ÷ | MORE MORE | 74-43-43-22- 12-008-0010 | 000026420 | New Business | 301 OLIVE | 09/20/2022 | \$0.00 | Self-m | anaged |
| | ÷ | N ORE | 68-43-42-09- 01-065-0010 | 000026417 | Mary Business | 101 ANCHORAGE | 09/20/2022 | \$0.00 | Self-m | anaged |

Step 5: File your return

4. Double click each shaded box from left to right to enter the following:

- Number of Nights rented for the month
- Gross Rental Receipts
- Exemptions for sales that are not subject to TDT. (example: tax exempt government agency). The account owner must maintain adequate records to support the exemption per Florida Statute 212.

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5. When all information is entered, Select the Paper Icon in the Action Box to file your return.

If filing a \$0.00 tax return, continue to page 14 for instructions.



Important Tip:

✓ The Icon Description is located on the lower right to explain each icon function. Clicking these icons will not perform the function.

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| 1 | Ξ | ⊻ ⊚ [| MORE | 74-43-43-22- 12-008-0010 | 000025791 | AB | С | 301 North OLIVE AVI | E | 06/ | 20/2022 | \$0.00 | | | Self-managed |
|---|---|--------|----------|-----------------------------|-----------|------|--------|------------------------|---|-----|----------|-----------------|---|---------------|--------------|
| | | Action | Tax Year | Filing Perio | od Supple | ment | 1. Num | ber Of Nights | | 0 | 2. Gross | Rental Receipts | 0 | 3. Minus(-) E | xempt Rental |
| | | F | 2022 | 05 | 00 | | 0 | | ~ | ^ | \$0.00 | | | \$0.00 | |
| | | e | 2022 | 06 | 00 | | 0 | | | | \$0.00 | | | \$0.00 | |
| | | e | 2022 | 07 | 00 | | 0 | | | | \$0.00 | | | \$0.00 | |
| | | E | 2022 | 08 | 00 | | 0 | | | | \$0.00 | | | \$0.00 | |
| | | E | 2022 | 09 | 00 | | 0 | | | | \$0.00 | | | \$0.00 | |
| | | F | 2022 | 10 | 00 | | 0 | | | | \$0.00 | | | \$0.00 | |
| | | E | 2022 | 11 | 00 | | 0 | | | | \$0.00 | | | \$0.00 | |

| ICON | DESCRIPTION |
|------------|--|
| | Select account |
| + | Expand row to display filing periods to file and pay returns |
| — | Collapse row to hide filing periods |
| ۲ | View account information and history |
| Ē | File a return |
| \$ | Add return to cart to pay |
| | Correct a previously filed return |
| × | Sends a request to close account (Owner) |
| • | Revoke assignment from Agent (Owner) |
| | Accept assigned account from an owner (Agent) |
| # 1 | Reject assigned account from an owner (Agent) |
| | |

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Step 6: View the Return

- The TDT return will calculate:
 - Line 6. Total Tax Collected
 - Line 7. Collection Allowance- credit for on time filing Up to \$30
 - Line 8-11. Late Filing Penalty, Fees, Interest- if applicable
 - Line 12. Current Month Amount Due

6. Choose one of the 3 options:

- 1. FILE AND ADD TO CART– Proceed to Step 9 to make payment.
- 2. FILE ONLY- If you select FILE ONLY, you may edit the return until the due date.
- 3. CANCEL- Return to "MY ACCOUNTS" screen to edit/update the information if incorrect.
- After choosing an option, the return will close.

| 1. Number of Nights | \$10.00 |
|------------------------------------|-------------|
| 2. Gross Rental Receipts | \$10,000.00 |
| 3. Minus(-) Exempt Rental Receipts | \$0.00 |
| 4. Plus(+) Excess Collections | \$0.00 |

| 6. Total Tax Collected 6% | \$600.00 |
|----------------------------------|----------|
| 7. Minus(-) Collection Allowance | \$15.00 |
| 8. Late Filing Penalty | \$0.00 |
| 9. Bad Check Fee | \$0.00 |
| 10. Plus(+) Penalty | \$0.00 |
| 11. Plus(+) Interest | \$0.00 |
| 12. (=) Current Month Amount Due | \$585.00 |



Important Tip:

FILE ONLY

FILE AND ADD TO CART

- It is recommended to file after the 1st of the month as once the payment is made, no edits can be made.
- ✓ Payments must be made prior to the deadline E.S.T. to avoid penalties and fees.
- ✓ TAXES ARE DUE AT THE TIME OF FILING.

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CANCEL



Step 7: Editing Your Return

- If the return is FILED and needs to be updated, Click the Pencil
- Repeat Step 6. Double click each box from left to right to edit the information.
- After the updates are made, Click on the local conto save your changes.
- You can edit as often as you need to until you are ready to file and pay.
- If you select FILE ONLY and payment is due, you must select the \$ Icon to add it to the CART.

| Action | Tax Year | Filing Period | Supplement | 1. Number Of Nights | 0 | 2. Gross Rental Receipts | 0 | 3. Minus(-) Exempt Rental |
|--------|----------|---------------|------------|---------------------|---|--------------------------|---|---------------------------|
| | 2022 | 05 | 00 | 10 | | \$10,000.00 | | \$0.00 |
| • • | 2022 | 06 | 00 | 20 | | \$20,000.00 | | \$0.00 |
| E | 2022 | 07 | 00 | 0 | | \$0.00 | | \$0.00 |

| Action | Tax Year | Filing Period | Supplement | 1. Number Of Nights | | 0 | 2. Gross Rental Receipts | 0 | 3. Minus(-) Exempt Rental | 1 |
|--------|----------|---------------|------------|---------------------|---|---|--------------------------|---|---------------------------|---|
| | 2022 | 05 | 00 | 10 | | | \$10,000.00 | | \$0.00 | |
| F | 2022 | 06 | | 15 | ~ | ~ | \$20,000.00 | | \$0.00 | |
| E | 2022 | 07 | 00 | 0 | | | \$0.00 | | \$0.00 | |

| Action | Tax Year | Filing Period | Supplement | 1. Number Of Nights | 0 | 2. Gross Rental Receipts 🚯 | 3. Minus(-) Exempt Rental |
|--------|----------|---------------|------------|---------------------|---|----------------------------|---------------------------|
| | 2022 | 05 | 00 | 10 | | \$10,000.00 | \$0.00 |
| e | 2022 | 06 | 00 | 15 | | \$15,000.00 | \$0.00 |
| E | 2022 | 07 | 00 | 0 | | \$0.00 | \$0.00 |

ICON DESCRIPTION

- File a return
- Add return to cart to pay
- Correct a previously filed return

| Action | Tax Year | Filing Period | Supplement | 1. Number Of Nights | 0 | 2. Gross Rental Receipts | 0 | 3. Minus(-) Exempt Rental |
|--------|----------|---------------|------------|---------------------|---|--------------------------|---|---------------------------|
| | 2022 | 05 | 00 | 10 | | \$10,000.00 | | \$0.00 |
| (S) , | 2022 | 06 | 00 | 15 | | \$15,000.00 | | \$0.00 |
| E | 2022 | 07 | 00 | 0 | | \$0.00 | | \$0.00 |



Step 8: Preparing to Pay

 If the return is edited and \$ Icon selected, after review, click ADD TO CART.

Important Tips:

- ✓ Once you add amounts due to the cart, the action box will turn blue and you will be unable to edit your return.
- ✓ The amount due will remain in the cart for two hours and will automatically be removed.
- ✓ If this occurs, click on file and add the amount due to the cart again.

Pay

You are filing for the future period which is due 07/20/2022

| 1. Number of Nights | \$15.00 | | | | |
|------------------------------------|-------------|--|--|--|--|
| 2. Gross Rental Receipts | \$15,000.00 | | | | |
| 3. Minus(-) Exempt Rental Receipts | \$0.00 | | | | |
| 4. Plus(+) Excess Collections | \$0.00 | | | | |
| 5. (=) Taxable Rental Receipts | \$15,000.00 | | | | |
| 6. Total Tax Collected 6% | \$900.00 | | | | |
| 7. Minus(-) Collection Allowance | \$22.50 | | | | |
| 8. Late Filing Penalty | \$0.00 | | | | |
| 9. Bad Check Fee | \$0.00 | | | | |
| 10. Plus(+) Penalty | \$0.00 | | | | |
| 11. Plus(+) Interest | \$0.00 | | | | |
| 12. (=) Current Month Amount Due | \$877.50 | | | | |



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ICON DESCRIPTION

| File a return | |
|---------------|--|
|---------------|--|

- Add return to cart to pay
- Correct a previously filed return

×

CANCEL

Step 9: View collection cart

Ready file and pay? Click "CHECKOUT". ٠



To view the collection cart and details, ٠ select the cart icon.



Checkout Home Property Tax Tangible Tax Tourist Development Tax 1,462.50 CHECK DUT 🔦 TDT Main File and Remit your taxes Returns may be filed up to 6 months in advance, including \$0 Returns for no rental activity.
 Returns are due on the 1st and DELINQUENT after · Select the account for which you want to file a return to begin Open our user friendly HOW TO GUIDE - File and Remit Taxes the 20th. If you need more help visit the TDT Support Center ASSIGN Agent • Total records: 4 PIN/PCN TDT# Or ... Due Amount Status Action Business... Address Next Due

Cart

- Once in the cart, to edit a return, • select the box and click "REMOVE" and return to Step 7.
- Ready to file and pay? Click ٠ "CHECKOUT".

| 0 | Removal of items requ | ired to be paid together | or in order will force | removal of the associated item(s) |
|---|-----------------------|--------------------------|------------------------|-----------------------------------|

Business Tax

| Ô | Ren | nove | | | | | |
|---|-----------|----------|--------|-------------|-------------|------------|----------|
| | Ξ | TAX YEAR | PERIOD | TDT ACCOUNT | BILL NUMBER | AMOUNT DUE | AMOUNT |
| 1 | \square | 2022 | 09 | 000026420 | T60335022 | \$877.50 | \$877.50 |
| 2 | | 2022 | 08 | 000026420 | T60335021 | \$585.00 | \$585.00 |

Grand Total: \$1,462.50



IMPORTANT: A return is not considered filed until payment is received.

RETURN

Step 10: Enter billing details- Name, Billing Address

< PREVIOUS

1. After clicking "Checkout", select NEXT.

2. All fields are required except when the payer is a business. In that case, the "First Name" can be left blank.

3. Click "Accept Terms" to go to Bill2Pay.

- This information will be loaded into Bill2Pay, the payment processor.
- 4. Click "PROCEED TO PAY".

| 1 | IAX TEAR | PERIOD | TDT ACCOUNT | BILL NUMBER | AMOUNT DUE | AMOUNT |
|--------------------|--|---|---|---|---|-------------------------|
| | 1 2022 09 | | 000026420 | T60335022 | \$877.50 | \$877.50 |
| 2 | 2022 | 08 | 000026420 | T60335021 | \$585.00 | \$585.00 |
| | | | | | | Total Amount: \$1,462 |
| _ | | | | | | |
| NEXT | > | | | | | PROCEED TO PAY |
| | | | | | | |
| Rev | view your items | | Contact Deta | ils & Terms | | |
| | | | | / | | |
| First Nar | me * | | | Last Name * | | |
| first | | | | last | | |
| Address | Line 1 * | | | | | |
| address | 3 | | | | | |
| Address | Line 2 | | | | | |
| | | | | | | |
| City * | | | State * | | Zip * | |
| city | | | Florida | Ŷ | 33401 | |
| Phone * | | | Email * | | | |
| (561) 3 | 55-1100 | | email@email.com | | | |
| | | | 58 I.S. | | | |
| By makin | ng your payment three your account num | ough this site, you ar ber is not entered co | e accepting responsibility for the rectly) you may be subject to | he accuracy of the information p late penalties and/or returned it | rovided. If your chosen payment em charges | t method is not honored |
| (example | e, your account nam | ber is not entered to | needy), you may be oubjeer to | | em enarges. | |
| (example | ts will be considered | received on the date ousiness days after s | e submitted and will show payr ubmission. | ment pending until funds are act | ually received. Payments will be | posted when funds are |
| Paymen | , usually within 2-3 t | | | | | |
| Paymen received | l, usually within 2-3 t | | | | | |

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PROCEED TO PAY

Step 11: Enter payment details- Bill2Pay

- Enter payment information and click "Submit."
- Clicking "Cancel" will take you back to the TDT site, where payment information will have to be re-entered.

Using the MyWallet Feature of Bill2Pay

- You can save payment methods to MyWallet.
- Credit card and bank account information can be saved for future payments.
- Remember to check the "Save payment method for future use" to add this payment method to MyWallet.

Important Tips:

- ✓ DO NOT use the back button to cancel your payment, click the "Cancel" button.
- ✓ E-checks do not have a fee and can be used to make payments up to \$999,999.99.
- ✓ Credit cards have a 2.4% fee which goes directly to the credit card processor and is not retained by the Palm Beach County Tax Collector.
- ✓ The maximum credit card amount is \$99,999.99.
- ✓ If MyWallet is not used, select and enter payment information for either a credit card or an e-check.

Billing Information

| Payment Options: | 🚍 Credit Card | eCheck | My Wallet | |
|--------------------|----------------------|--------|-----------|---|
| First Name: | | | | |
| first | | | | |
| Last Name/Busines | 5: | | | |
| last | | | | |
| Country: | | | | |
| United States | | | | |
| State: | | | | |
| Florida | | | | |
| Billing Zip: | | | | |
| 33401 | | | | |
| Credit Card Number | : VISA 😂 100-15 | 101 | | |
| Credit Card Number | | | | |
| Expiration Date: | | | CVV: 0 | |
| MM / CCYY | | | CVV | Ē |
| Save payment met | thod for future use? | | | |
| | | | 0 | |
| | | | | |

12



Step 12: Complete the payment

- 1. Agree to the Terms and Conditions.
- 2. Enter your email address to receive payment confirmation.
- 3. Click "Pay Now".
- A confirmation box will appear to show successful payment along with your checkout receipt.

Thank you for using the Palm Beach County Payment Portal!

Made a payment?

Thank you! We hope your experience was trouble free and easy. You will receive a transaction confirmation by email. Please keep the emailed confirmation for your records (don't forget to check your junk mail and spam folders).

Accidentally canceled your payment at checkout?

No worries! Your item(s) should still be available to pay. Head back to the checkout and proceed to pay.

General Information

For general payment or transaction information or if you need assistance please call our office at 561-355-2264 or email to ClientAdvocate@pbctax.com.

Please help us improve. Feedback about your online payment experience is important to us. Please take our survey now

Note: You can check the status of your payment any time by clicking on your Parcel Number number in the receipt section below:



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Confirm Your Payment

Please review the details of your payment below before clicking Pay Now to complete.

PLEASE NOTE: It is VERY IMPORTANT that you verify all banking information is correct before submitting your electronic payment. Should your electronic payment be rejected, you will be required to submit your payment in the form of a personal check, cashier's check or money order made payable to the Palm Beach County Tax Collector.

| 2 | Product Name | Account # | Amount | |
|-----|-----------------|-----------|------------|--|
| 1 | TDT | T60335022 | \$877.50 | |
| 2 | TDT | T60335021 | \$585.00 | |
| 3 | Convenience Fee | | \$35.10 | |
| Tot | al Amount: | | \$1,497.60 | |

Credit Card Information

Cardholder's Name: sue engl Card Type: Mastercard

Card Number: *********4444

Expiration Date: 12 / 2022



A confirmation email will be sent to the email address below. Please verify before



Cel Pay Now

How to File a \$0.00 Return

Important Tips:

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- ✓ You can file 6 months in advance.
- ✓ Make sure to file \$0.00 Return before the due date to avoid a \$50 penalty. If tax is due and delinquent, additional penalties and interest may apply.
- In the **MY ACCOUNTS** section:
- 1. Click the box with the + sign to view account details.

Click the Paper icon.
 Click "FILE ONLY" in the pop-up box
 The result will be \$0.00 filing.

3. Scroll right to see the status of "Filed."

Congratulations! You have filed your return and paid your taxes!

| 1. Number Of Nights | 0 | 2. Gross Rental Receipts | 0 | 3. Minus(-) Exempt Rental 🚯 | 4. Plus(+) Excess Collectio 🕄 | Status | Due Date | ^ |
|---------------------|---|--------------------------|---|-----------------------------|-------------------------------|---------------------------|------------|---|
| 0 | | \$0.00 | | \$0.00 | \$0.00 | Filed | 06/20/2022 | |
| 0 | | \$0.00 | | \$0.00 | \$0.00 | Filed | 07/20/2022 | |
| 0 | | \$0.00 | | \$0.00 | \$0.00 | • Filed | 08/22/2022 | |
| | | | | | | | | |

| + | ⊎ © [| MORE | 74-43-43-22- 12-008-0010 | 000025791 | ABC | 301 North OLIVE AVE | 06/2 | 0/2022 | \$0.00 | | | Self-managed |
|---|--------|------------------|-----------------------------|------------|------------------|------------------------|------|------------------------------|-----------------|---|---------------|--------------|
| - | × ∞ | MORE | 74-43-43-22- 12-008-0010 | 000025791 | ABC | 301 North OLIVE AVE | 06/ | 20/2022 | \$0.00 | | | Self-managed |
| | Action | Action Tax Year | | od Supplem | Supplement 1. Nu | 1. Number Of Nights | 0 | 2. Gross | Rental Receipts | 0 | 3. Minus(-) E | xempt Rental |
| | (5) 🖊 | 2022 | 05 | 00 | 0 0 | | | \$0.00 | | | \$0.00 | |
| - | (5) 🖌 | 2 2022 06 | | 00 | 0 | 0 | | \$0.00 | \$0.00 | | \$0.00 | |
| | E | 2022 | 07 | 00 | 0 | | | \$0.00 | | | \$0.00 | |





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For additional tutorials, please visit the TDT Support Center at <u>www.pbctax.com/tdt</u>