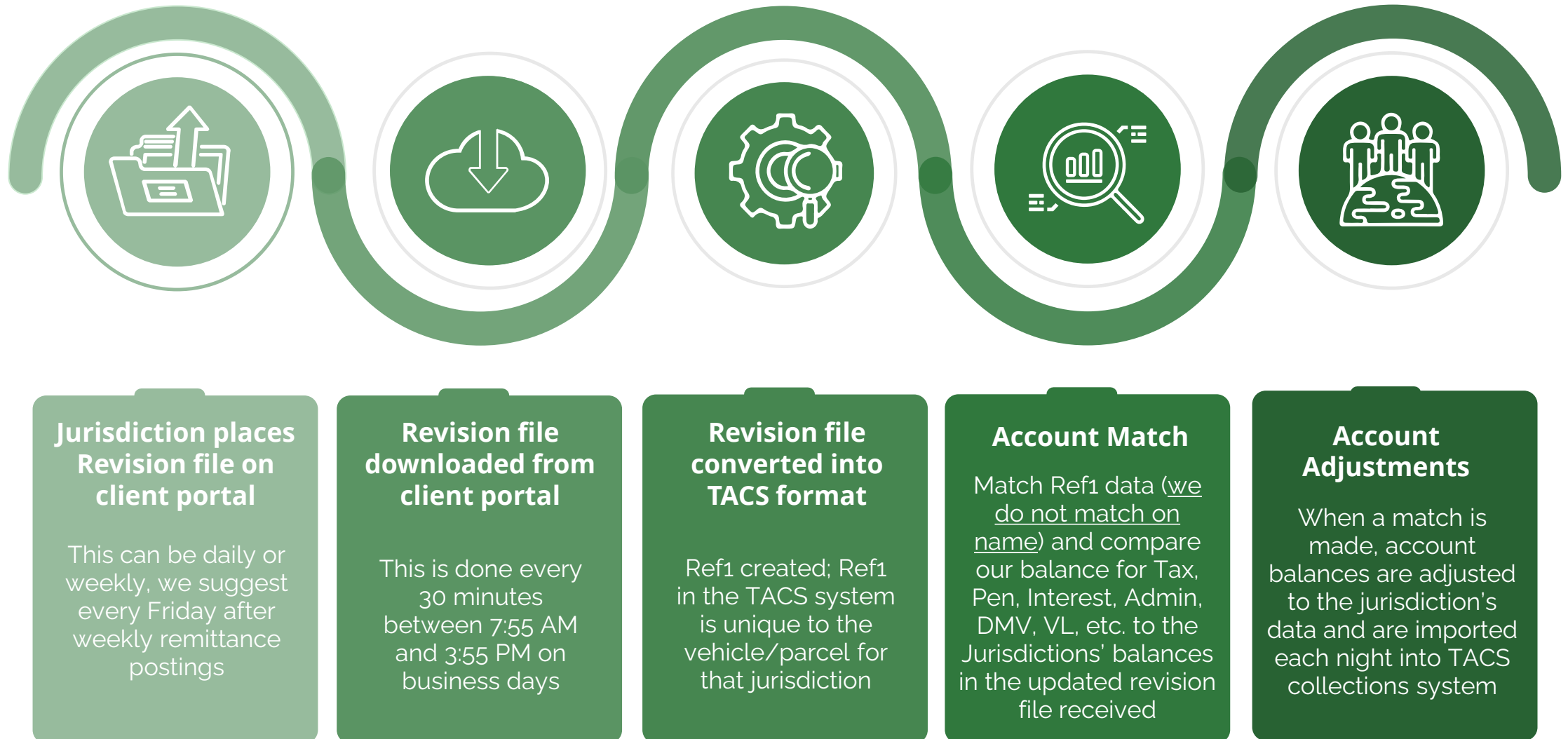


Revision File Transfers

2025 Client Training Sessions

File Transfer Flow

2



Key Items to Know

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01

If the taxpayer **does not** currently exist in our TACS collections system and **is included** in the Jurisdictions' revision file

- we will add this taxpayer and bills as a new account

OR

02

If the taxpayer has an **existing account** in our TACS collections system and **is not** in the Jurisdictions' revision file

- we remove the balances in our TACS system

Reasons this could happen:

1. an adjustment brings the balances to zero or the jurisdiction took a direct payment
2. jurisdiction removes the collection flag on their system which would remove from Jurisdictions' revision file

System with a Collection Flag



Removing an account from TACS

Removing the flag removes the record from your file. This, in turn, removes the balances from TACS



Resending the account to TACS

Place the flag back on the account. This will place the account back in your revision file and cause balances to adjust up at TACS



Remember to send a revision file so we can adjust account balances, or we will not be in sync with your system

Systems without a Collection Flag Ability

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To pull an account

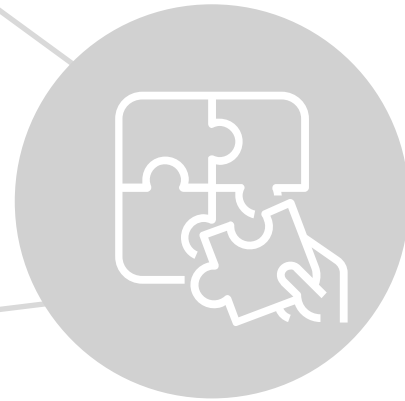
Contact TACS

Notify Super@TAXVA.com that the account will be pulled



If the account is pulled

TACS will manually cancel the account making the balance zero



To resend an account

Contact TACS

Notify Super@TAXVA.com that the account will be resent



If the account is resent

TACS will manually reactivate the account. This will not reflect any payments or adjustments you made while the account was in a cancelled status



A new revision file is needed to update balances with TACS

**WITHOUT A REVISION FILE,
TACS WILL HAVE INCORRECT
BALANCES!**



TACS Adjustment Guidelines Posted Payments

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We find an account that matches Ref1 in the Jurisdictions' Revision file and the TACS file and a payment has been posted on the TACS side

Is the TACS payment date less than 21 days of the revision file date?



Less than 21 days

TACS **does not adjust** to Jurisdictions' balance



This is because we hold payments for 14 days and then send remittance to you for posting in your system.



More than 21 days

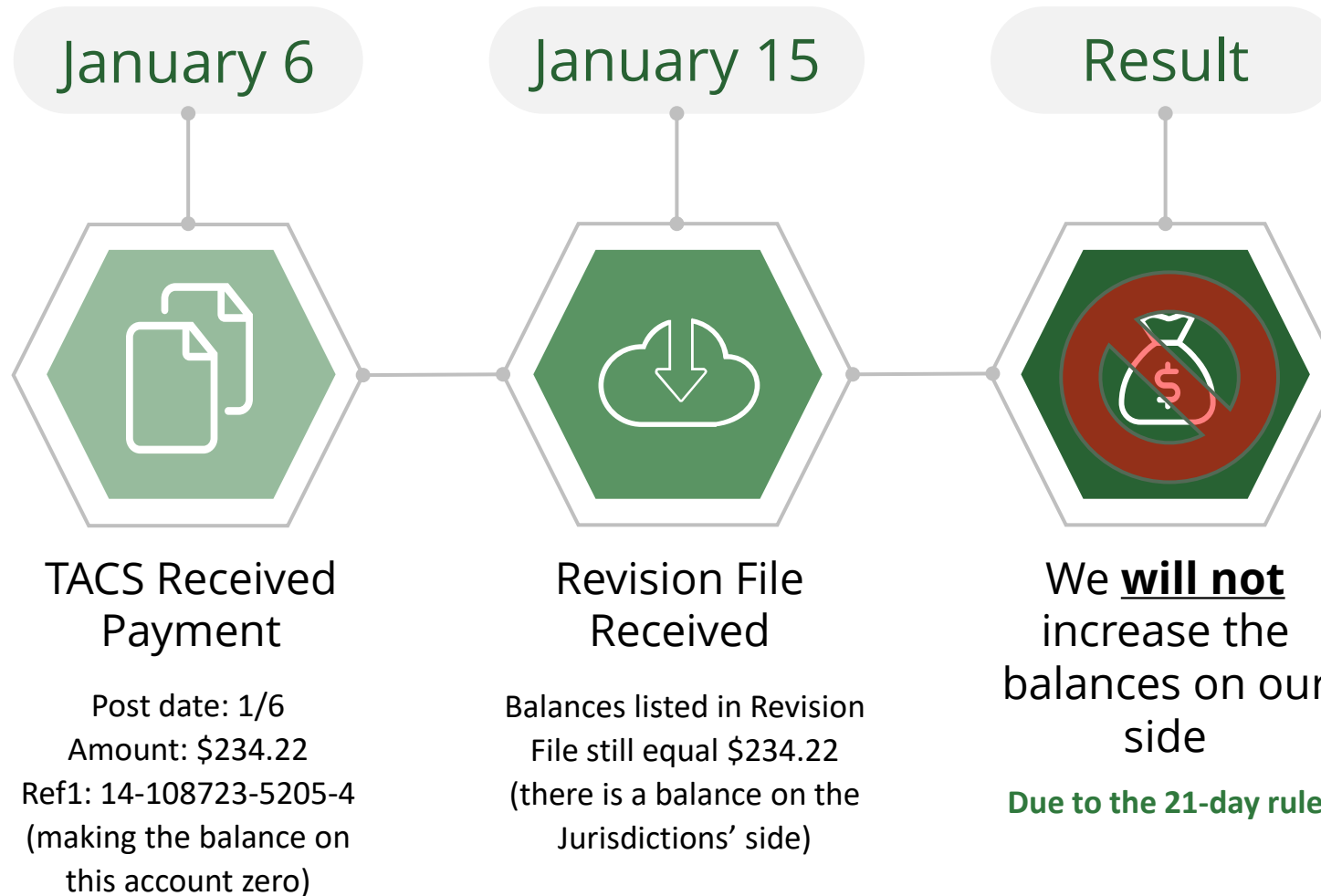
TACS **adjusts** to the Jurisdictions' balances



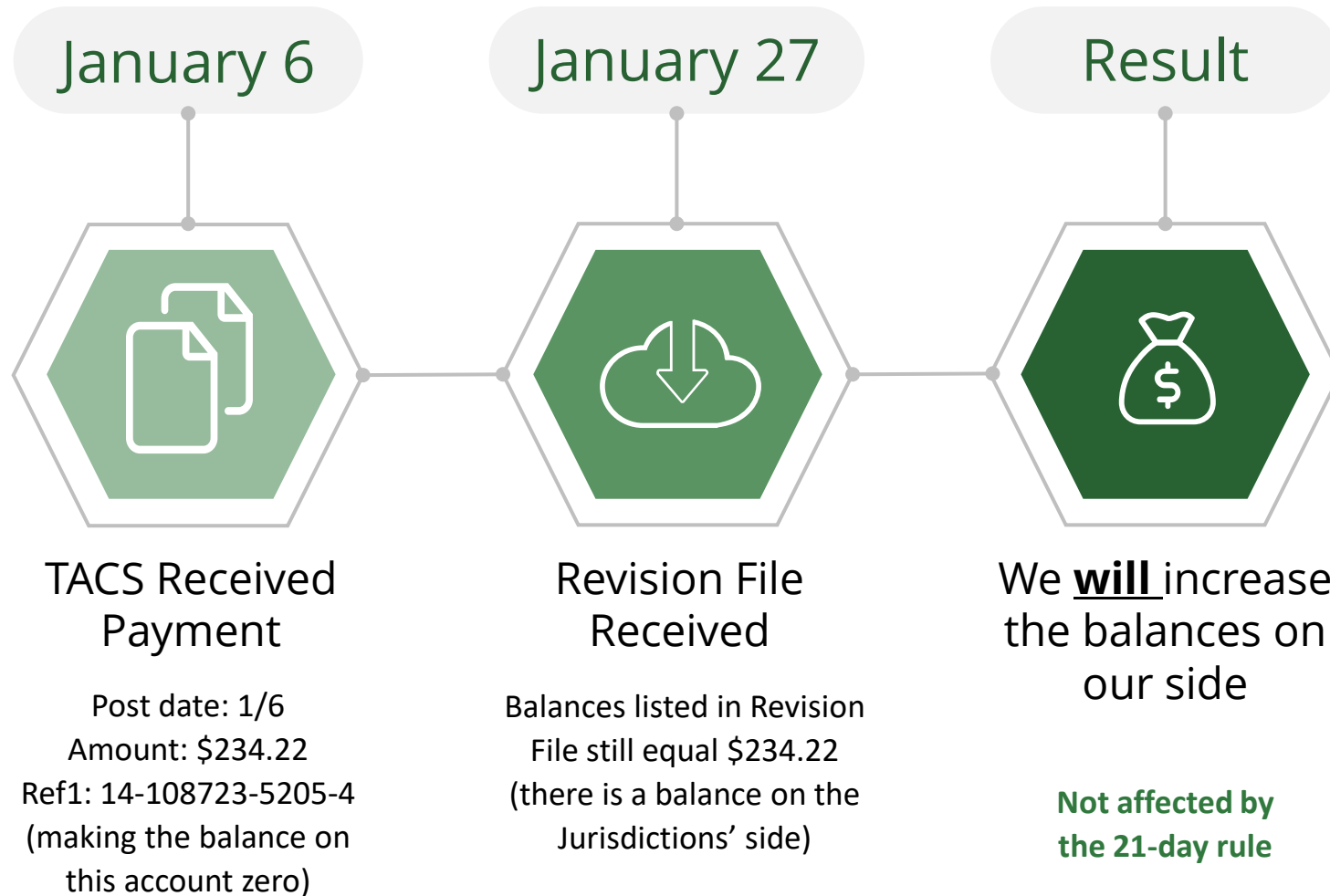
Post remittance payments to Jurisdiction ASAP; if the Jurisdiction does not post payments timely, this will increase TACS system balances

Payment Posting Example #1

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Payment Posting Example #2



Avoiding Common File Issues



Problem #01

Ensure file names do not contain dots



Problem #02

Include a date in each file name to ensure uniqueness



Problem #03

Append "TEST" to the file name if it is intended for testing



Problem #04

Place revision files exclusively in the "Account files for TACS" folder

Portal assistance

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[TACS Client Portal User Help Documentation](#)

[TACS Client Portal Demo Video](#)

[Portal Access Request Form](#)

Emails from noreply-taxva@highq.com or automation@app.smartsheet.com are from tools we use



**TAXING AUTHORITY
CONSULTING SERVICES, P.C.**

Questions?

Contact Information

Files@taxva.com or add a post to your portal's Activity page

**Todd Flax,
IT Manager**

804.893.5177

tflax@taxva.com

**Cathy Keith,
IT Project Manager**

804.293.8604

ckeith@taxva.com

**Gary Sabean,
Operations Manager**

703-791-9958

gsabean@taxva.com