

SynergySoft Pensioners & Seniors Rates (WA)

Overview

This course is designed for Rates Officers and will provide the essential information required to manage Pensioner and Senior Rebate and Deferment Claims in the SynergySoft Rates and Property systems for Western Australian local government areas.

Those wishing to take advantage of a refresher would also benefit from attending this course.

Who You Are

Attendees will need to have:

- Knowledge of Western Australian Local Government Rating functions and concepts
- Knowledge of SynergySoft Rates and Property Systems
- Fundamental knowledge of computers

Learning Outcomes

1. Account Settings
2. Standard Settings
 - A review of the standard settings that affect Pensioners and Seniors
3. General Enquiries
4. Pensioner and Senior Record Maintenance
 - All aspects of creating and maintaining a Pensioner or Senior records
 - a. Creating new records
 - b. Setting Relevant Interest Status
 - c. Changing status from Senior to Pensioner

d. Stopping Pensioner/Senior status upon loss of entitlement

5. Understanding the Rebate Cycle in SynergySoft

6. Rebate Claim Process

How to generate a rebate claim to the WA Office of State Revenue

a. Reconciliation of rebates to be claimed to the General Ledger

b. Reporting of rebates to be claimed

c. Generation of Rebate Claim files

d. Receipting approved rebate claims

7. Rejected Rebate Claims

What to do when the WA Office of State Revenue reject a rebate claim

a. Reversal of rebates given

b. Recreating new claim files

8. Processing Supplementary Rebate Claims

9. Reporting

10. Deferments

All details relating to the deferment of rates and charges for Pensioners

a. General enquiries

b. Maintenance of Deferment details

c. Generation of the Deferred Rates Claim file

d. Reporting Deferred balances

Please note this course will *not* cover any aspects of the following areas, for which separate courses are available:

- Rates and Property Essentials
- Interim Rating, Subdivisions and Amalgamations
- Rates Modelling
- End of Year functions
- Rates Billing