

Occupancy Tax Application Tutorial

Warren County Tourism Department



Your Home Page

From the Warren County Website, you will be directed to this page. All applicants will initially need to register as a New User. Subsequent logins will bypass this process.

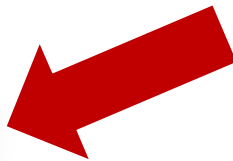


Occupancy Tax and Sponsorship Applications are now submitted online via this portal.

In order to submit an application you must register an account. If you already have an account, click the sign in button to view your Dashboard.

New User Registration

Existing User Login



Organization Name The legal entity Warren County will be contracting with. Please include PC, LLC, etc. designations

Organization Type From drop down box, choose profit status of the organization

Event Name Proper full name of the event, no year designation

Primary Contact This is the main organizer of the event the County will be working with

Please complete all fields, including Title of the organizer.

When all of the information has been reviewed, click “Submit Request” button

Occupancy Tax New User Registration

Save Cancel

Organization Name * Warren County Tourism Department

Organization Type * Non-Profit (501-c-3)

Event Name * Event Example

Primary Contact

First Name * Paul

Last Name * Tackett

Email * @gmail.com

Phone * 518-761-6369

Title Tourism Coordinator

Address1 1340 State Route 9

Address2

City Lake George

State NY

Zip 12845

Submit Request

Submitted On

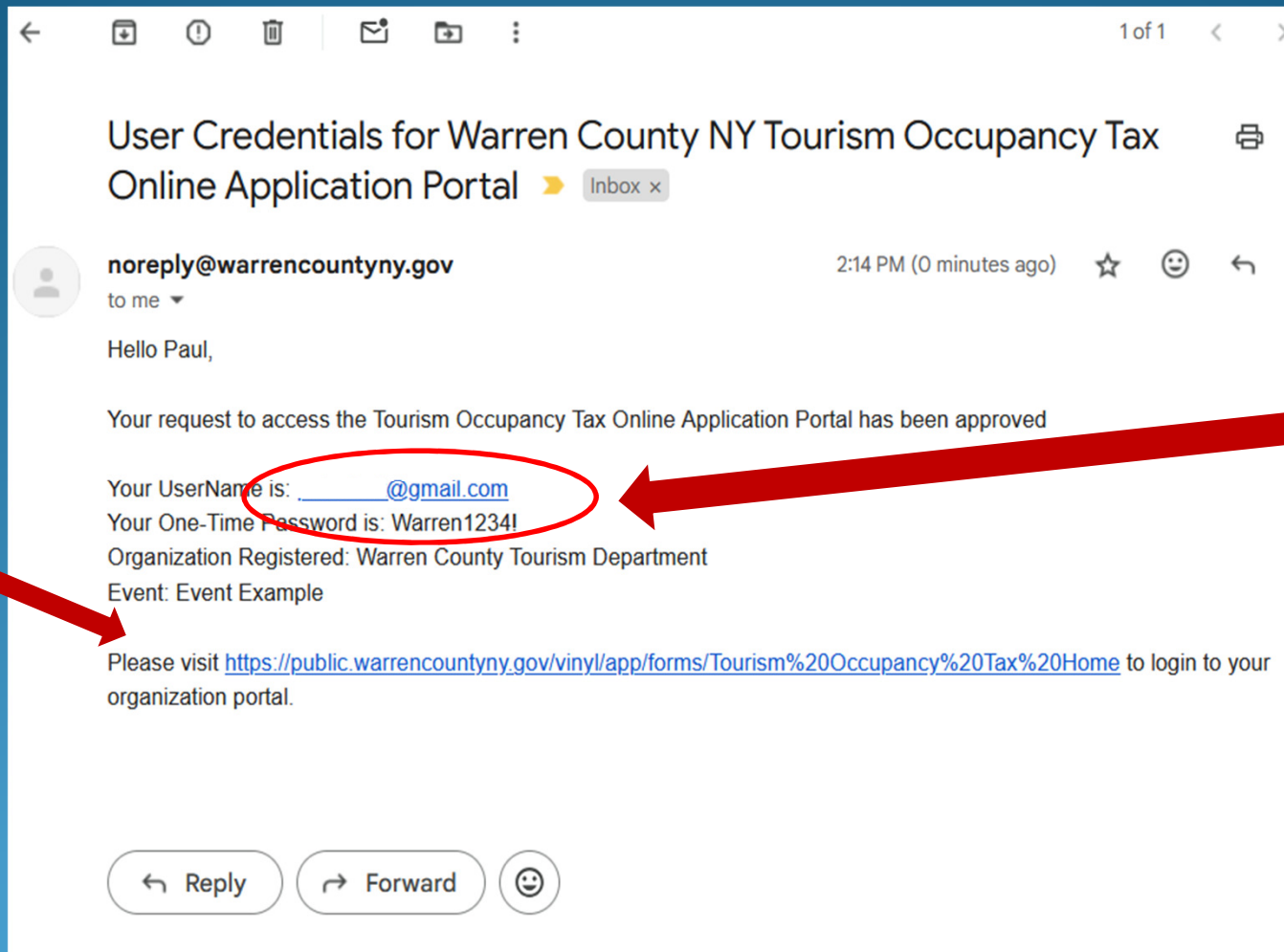
Once you have submitted your request, the Warren County Tourism and IT departments will conduct an internal review that may take up to a couple of days, particularly on weekends. On approval, an email will be generated to the email address you provided. For now, you may click the circled "X" at top right to close out this window and wait for your email with User Credentials to arrive!



Access Request Submitted

Organization Name	Warren County Tourism Department
Email	@gmail.com
First Name	Paul
Last Name	Tackett
Contact Phone	518-761-6369
Submitted On	8/13/2024 1:48 PM

Now that the User Credentials have arrived in the applicant's email, click on the https link at the bottom of the screen.



You will be using your UserName, which is your email address, and the one-time password, which you will change and store in your files for future reference!

Clicking on the http link from the previous page will bring you back to the application site, where you will now click on the “Existing User Login” tab:

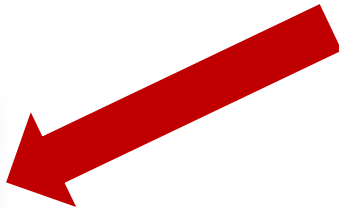


Occupancy Tax and Sponsorship Applications are now submitted online via this portal.

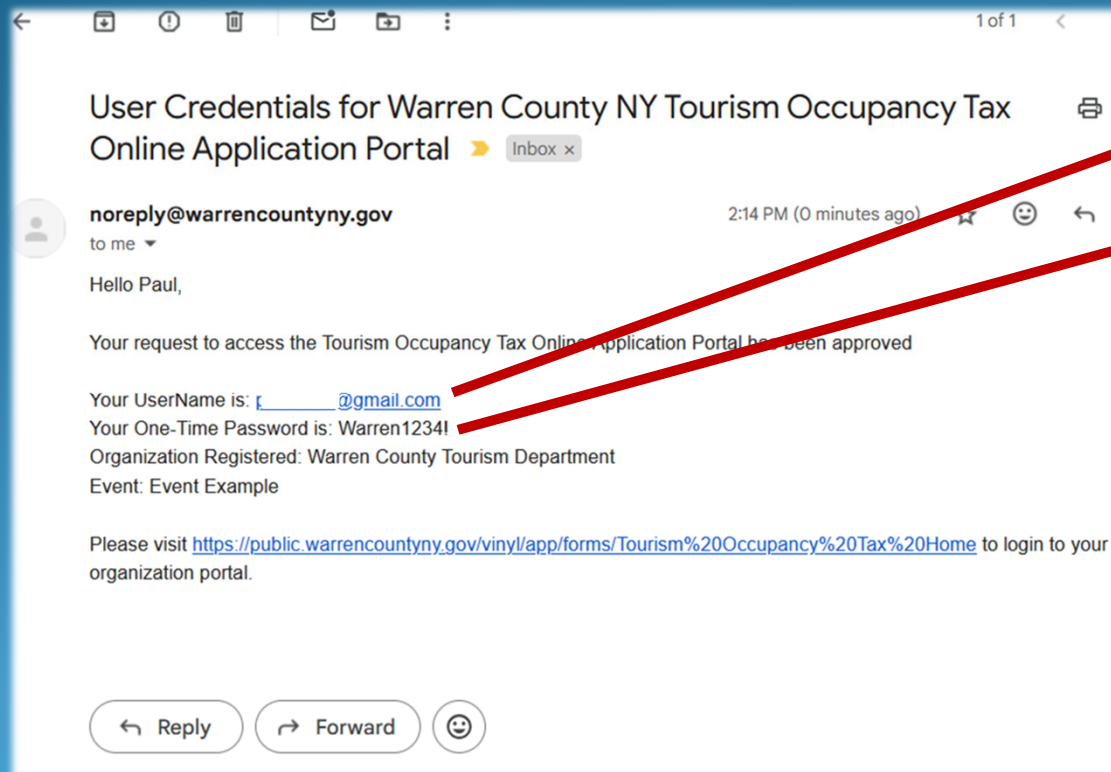
In order to submit an application you must register an account. If you already have an account, click the sign in button to view your Dashboard.

New User Registration

Existing User Login



The “Existing User Login” tab will bring you to the Vinyl login page. Enter your permanent User Name and your one-time password:



Sign in with Local User

User Name

Password

Sign In

Forgot password?

Sign in with Sheriff User Login

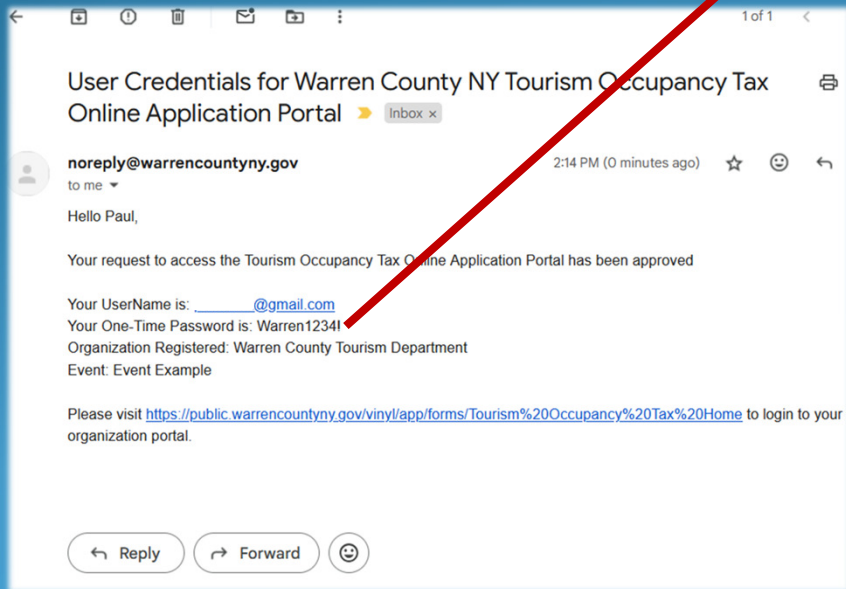


The applicant will then be instructed to change the account password.

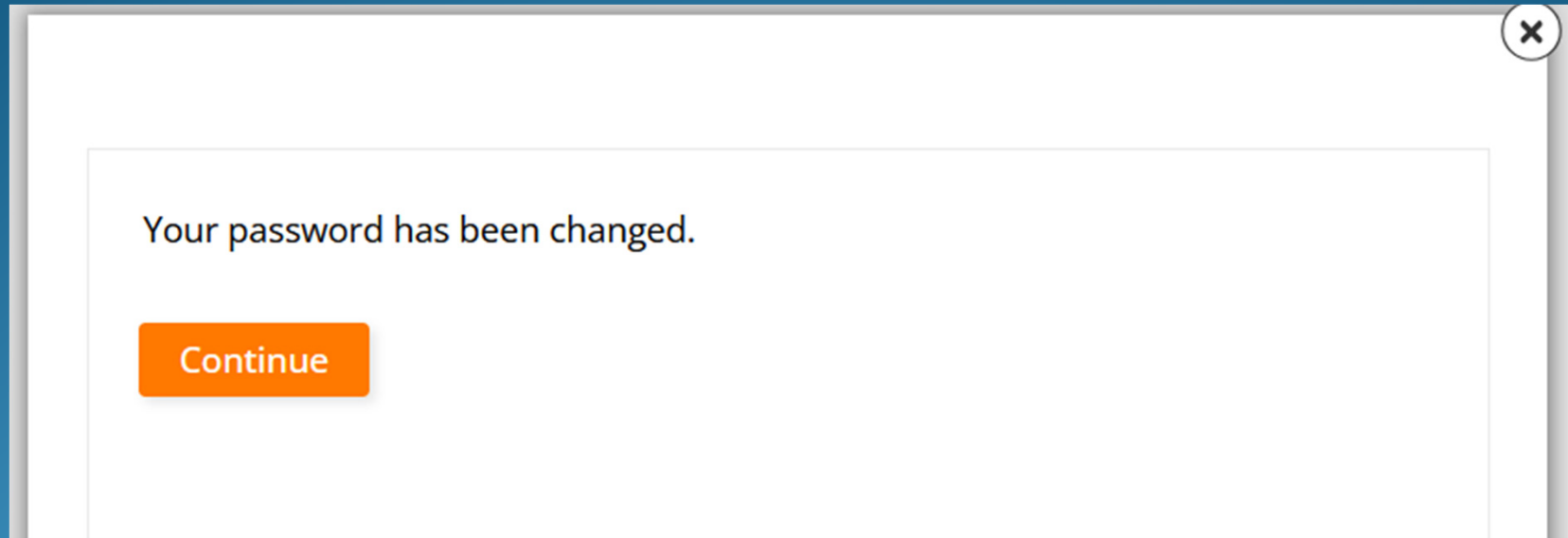
In the Current Password box, enter the one-time password received in the email.

Create and confirm a new password and store that password for future reference.

Then click the "Save Password" tab.

A screenshot of a web form for changing a password. The form has a title bar with a close button (X). The main content area contains the following text: "Your password has expired. Please change your account password before continuing." Below this text are three input fields: "Current Password", "New Password", and "Confirm New Password". Each field has a small orange vertical bar on its left side. At the bottom of the form is an orange button labeled "Save Password". A red arrow points from the "Current Password" field to the "Current Password" field in the adjacent screenshot.

On notification of password change, applicant can click “Continue”.



The User Name and new Password are permanent and will be required to access the Portal to manage the existing Organization and Event, as well as future events. Put both in a safe place for future reference!

This window will appear after clicking “Continue.” Notice that your organization’s name appears on the first row, and your Organization’s event appears on the second row.

← Password Changed Tourism Occupancy Tax Dashboard Home ☰

Organization(s)

Organization Name
Warren County Tourism Department

Organization Events (for Selected Organization)

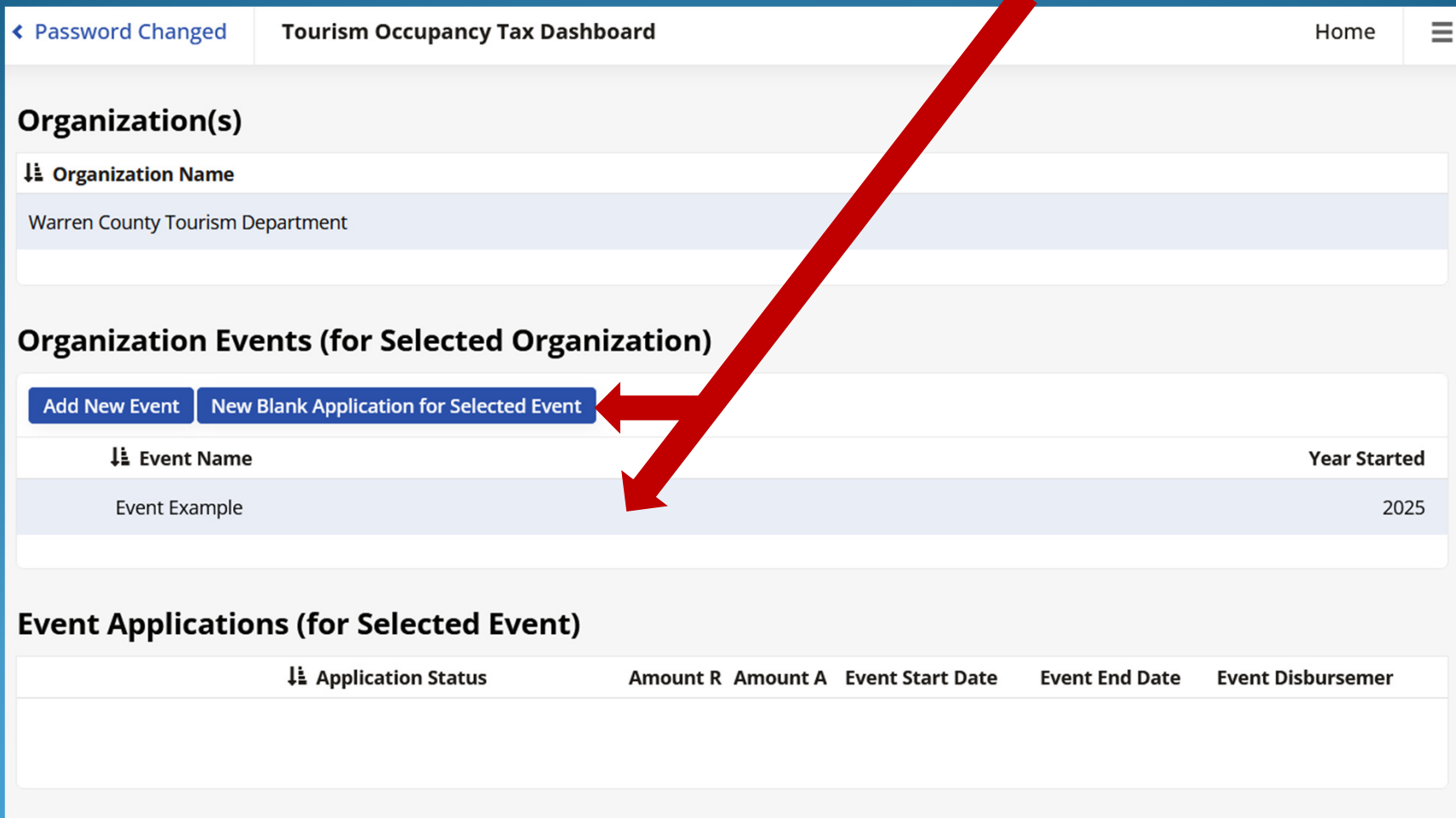
[Add New Event](#) [New Blank Application for Selected Event](#)

Event Name	Year Started
Event Example	2025

Event Applications (for Selected Event)

Application Status	Amount R	Amount A	Event Start Date	Event End Date	Event Disbursemer
--------------------	----------	----------	------------------	----------------	-------------------

Since the event “Event Example” is highlighted, the applicant will select the tab “New Blank Application for Selected Event.” If the applicant wanted to create a different event under the same Organization name, the “Add New Event” tab would be clicked. In this case, as in all cases for New Users, we are working with the existing event.



The screenshot displays the 'Tourism Occupancy Tax Dashboard' with a navigation bar at the top containing a back arrow, 'Password Changed', the dashboard title, 'Home', and a menu icon. The main content area is divided into three sections:

- Organization(s)**: A section with a dropdown menu for 'Organization Name' currently set to 'Warren County Tourism Department'.
- Organization Events (for Selected Organization)**: A section containing two tabs: 'Add New Event' and 'New Blank Application for Selected Event'. Below the tabs is a table with columns for 'Event Name' and 'Year Started'. The table contains one entry: 'Event Example' with 'Year Started' as '2025'. A large red arrow points from the top right towards the 'New Blank Application for Selected Event' tab and the 'Event Example' row.
- Event Applications (for Selected Event)**: A section with a table header including 'Application Status', 'Amount R', 'Amount A', 'Event Start Date', 'Event End Date', and 'Event Disbursemer'. The table body is currently empty.

Since the event “Event Example” is highlighted, the applicant will select the tab “New Blank Application for Selected Event”.

← Password Changed Tourism Occupancy Tax Dashboard Home ☰

Organization(s)

Organization Name
Warren County Tourism Department

Organization Events (for Selected Organization)

[Add New Event](#) [New Blank Application for Selected Event](#)

Event Name	Year Started
Event Example	2025

Event Applications (for Selected Event)

Application Status	Amount R	Amount A	Event Start Date	Event End Date	Event Disbursemer
--------------------	----------	----------	------------------	----------------	-------------------

The applicant will now enter the amount requested and proceed through all of the tabs below, starting with Organization and continuing through to Review/Submit. Complete each section in its entirety.

[← Tourism Occupancy Tax Dashboard](#) | **Tourism Occupancy Tax Application v2** | [Home](#)

Application Sections

Organization:

Event:

Amount Requested:

Application Preview

After selecting "Save" this screen will appear.

The applicant may start clicking through each tab, beginning with Organization.

← Tourism Occupancy Tax Dashb... **Tourism Occupancy Tax Application v2** Home

Application Sections

Organization: Warren County Tourism Department

Event: Event Example

Amount Requested: \$15,000.00

Organization Rules Event Details Location(s)

Event Budget

Application Preview

Organization		Event			
Name	Warren County Tourism Department	Name	Event Example		
Type	Non-Profit (501-c-3)	Year Started	2025		
Primary Contact	Paul Tackett	New Event?	Annual Event?	Multi Day?	Multi Week/Month?
Contact Title	Tourism Coordinator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Phone	518-761-6369	Season			
Contact Email		Event Dates			
Mailing Address		Start Date	End Date	Disbursement Date	
Address 1	1340 State Route 9	Application Info			
Address 2		Period	2024		
City	Lake George	Status	In Progress		
State	NY	Amount Requested	\$15,000.00		
Zip	12845	Amount Awarded			

Event Managing Organization (As it will appear in the contract, include PC, LLC, etc.)

Save Cancel

Organization Name

Warren County Tourism Department

Organization Type

Non-Profit (501-c-3)

Mailing Address

Address 1

1340 State Route 9

Address 2

City

Lake George

State

NY

Zip

12845

Primary Contact

Name

Paul Tackett

Title

Tourism Coordinator

Phone

518-761-6369

When the "Organization" tab is open, notice that the "Save" tab is faded. This indicates that not all of the fields are filled in. It is likely that the email address needs to be entered at the bottom (not visible in this image).

Note that when the email field has been completed, the "Save" tab becomes available, indicating that all fields are completed and can be saved.

< Tourism Occupancy Tax Applic... Managing Organization Home

Event Managing Organization (As it will appear in the contract, include PC, LLC, etc.)

Mailing Address

Address 1
1340 State Route 9

Address 2

City
Lake George

State
NY

Zip
12845

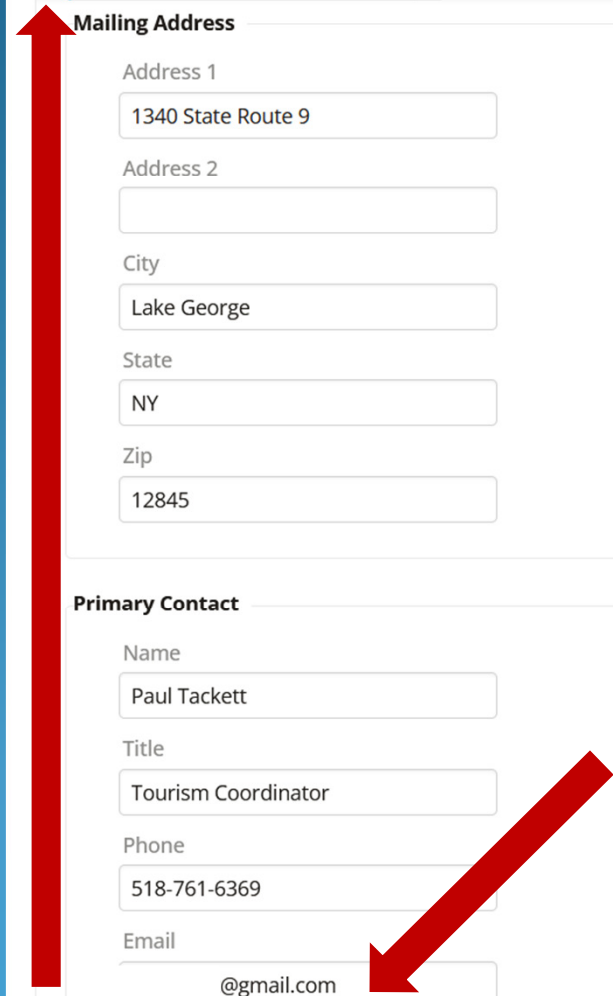
Primary Contact

Name
Paul Tackett

Title
Tourism Coordinator

Phone
518-761-6369

Email



Notice that once the applicant "Saves" the Organization page, the tab will turn green. This indicates that the section is complete and the applicant may move on to the "Rules" tab.

[← Tourism Occupancy Tax Dashb...](#) **Tourism Occupancy Tax Application v2** [Home](#)

Application Sections

Organization: Warren County Tourism Department

Event: Event Example

Amount Requested: \$15,000.00

Organization Rules Event Details Location(s)

Event Budget

Application Preview

Organization		Event			
Name	Warren County Tourism Department	Name	Event Example		
Type	Non-Profit (501-c-3)	Year Started	2025		
Primary Contact	Paul Tackett	New Event?	Annual Event?	Multi Day?	Multi Week/Month?
Contact Title	Tourism Coordinator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Phone	518-761-6369	Season			
Contact Email	petackett@gmail.com	Event Dates			
		Start Date	End Date	Disbursement Date	

Notice that once the applicant "Saves" the Organization page, the tab will turn green. This indicates that the section is complete and the applicant may move on to the "Rules" tab.

[← Tourism Occupancy Tax Dashb...](#) **Tourism Occupancy Tax Application v2** [Home](#)

Application Sections

Organization: Warren County Tourism Department

Event: Event Example

Amount Requested: \$15,000.00

Organization | Rules | Event Details | Location(s)

Event Budget

Application Preview

Organization		Event			
Name	Warren County Tourism Department	Name	Event Example		
Type	Non-Profit (501-c-3)	Year Started	2025		
Primary Contact	Paul Tackett	New Event?	Annual Event?	Multi Day?	Multi Week/Month?
Contact Title	Tourism Coordinator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Phone	518-761-6369	Season			
Contact Email	@gmail.com	Event Dates			
		Start Date	End Date	Disbursement Date	

In the Rules section, the applicant is required to read to document, and acknowledge. The Rules will appear in the Rules/Guideline section shown below. They will be available to review with the Occupancy Tax period opens.


← Tourism Occupancy Tax Applic... **Rules & Guidelines** Home ☰

Rules/Guidelines Acknowledgement ✕

Acknowledged On Acknowledged By

Acknowledge

Rules/Guidelines



The Applicant can then select the “Acknowledge” tab and then click the circled “X” on the top right-hand side of the window.

The screenshot displays a web application interface with a blue header and a white content area. The header contains a navigation bar with a back arrow, the text "Tourism Occupancy Tax Applic...", a tab labeled "Rules & Guidelines", and a "Home" link. A hamburger menu icon is visible in the top right corner. Below the header, the main content area is titled "Rules/Guidelines Acknowledgement". This section contains a form with two input fields: "Acknowledged On" and "Acknowledged By". A blue button labeled "Acknowledge" is positioned below the "Acknowledged On" field. A red arrow points from the text above to this button. In the top right corner of the content area, there is a small circular icon containing an "X", which is also pointed to by a red arrow.

← Tourism Occupancy Tax Applic... Rules & Guidelines Home

Rules/Guidelines Acknowledgement

Acknowledged On Acknowledged By

Acknowledge

Rules/Guidelines

Once the applicant has acknowledged and then "X" out, this window appears and the "Rules" tab is now green, indicating it has been completed and the applicant can move on and click the "Event Details" tab.

Application Sections

Organization: Warren County Tourism Department

Event: Event Example

Amount Requested: \$15,000.00

Organization | **Rules** | Event Details | Location(s)

Event Budget

Application Preview

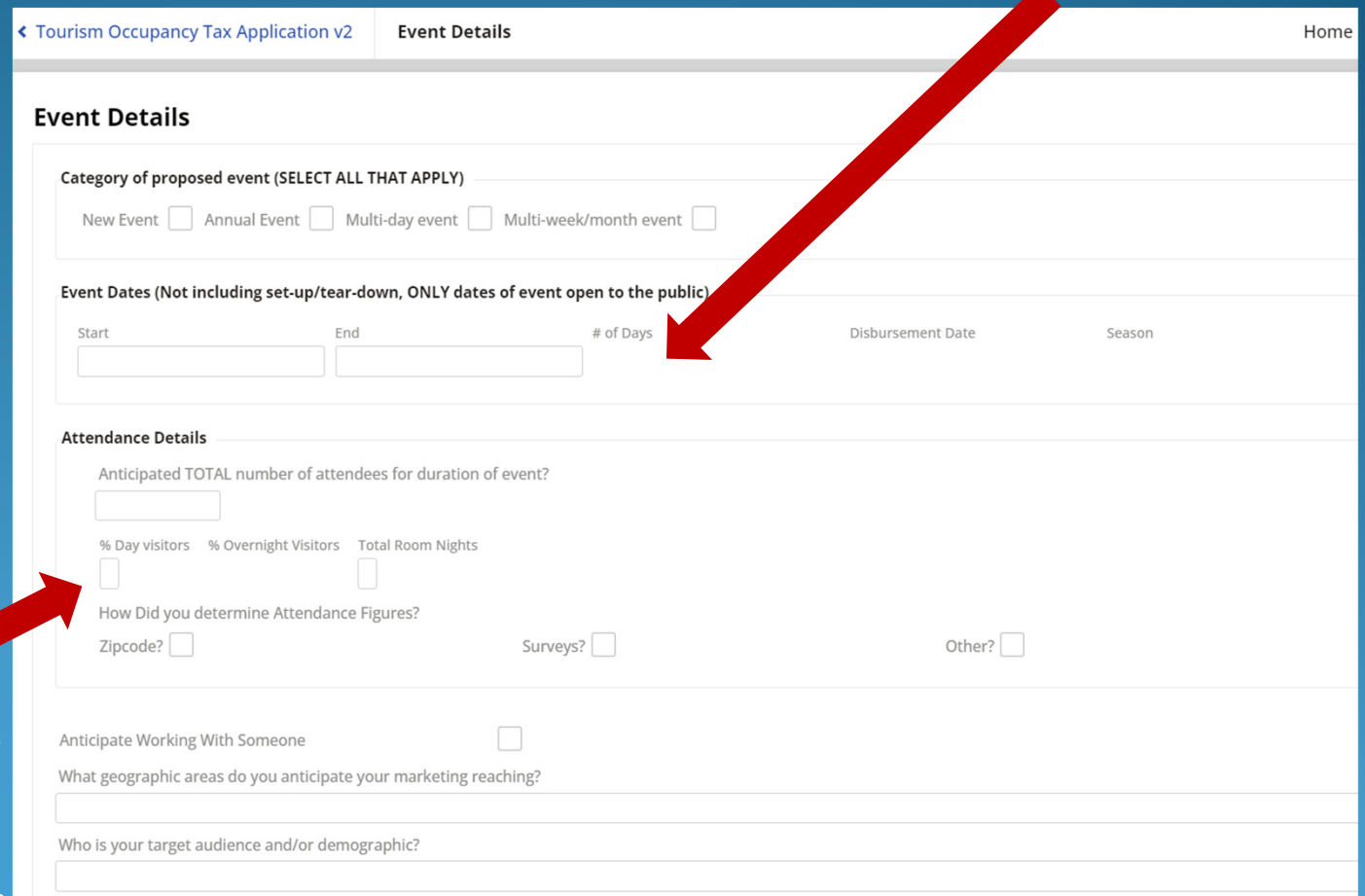
Organization		Event			
Name	Warren County Tourism Department	Name	Event Example		
Type	Non-Profit (501-c-3)	Year Started	2025		
Primary Contact	Paul Tackett	New Event?	Annual Event?	Multi Day?	Multi Week/Month?
Contact Title	Tourism Coordinator	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Phone	518-761-6369	Season	Event Dates		
Contact Email	@gmail.com		Start Date	End Date	Disbursement Date

Select all categories that apply to your event, checking the box to the right of your choices.

Event dates: Clicking on the Start and End boxes will drop down a Calendar icon to the right in that box. Click on icon and select your dates by navigating the calendar window.

Attendance: Please estimate total number of attendees for the duration of the event. If yours is a three-day event, multiply the number of estimated daily visitors by 3.

Estimate percentage of Day visitors. The Overnight percentage and Total Room Nights will Autofill. For multi-week, multi-month events, the Total Room Nights can be typed in manually.



The screenshot shows a web form titled "Event Details" under the heading "Tourism Occupancy Tax Application v2". The form is divided into several sections:

- Event Details**:
 - Category of proposed event (SELECT ALL THAT APPLY): New Event Annual Event Multi-day event Multi-week/month event
 - Event Dates (Not including set-up/tear-down, ONLY dates of event open to the public):
 - Start:
 - End:
 - # of Days: (indicated by a red arrow)
 - Disbursement Date:
 - Season:
- Attendance Details**:
 - Anticipated TOTAL number of attendees for duration of event?:
 - % Day visitors: % Overnight Visitors: Total Room Nights: (indicated by a red arrow)
 - How Did you determine Attendance Figures?:
 - Zipcode?
 - Surveys?
 - Other?
 - Anticipate Working With Someone:
 - What geographic areas do you anticipate your marketing reaching?:
 - Who is your target audience and/or demographic?:

Check boxes for how you determine attendance figures. By selecting "Other" a drop-down description box will appear. Please fill in the details here.

← Tourism Occupancy Tax Application v2 **Event Details** Home ☰

Event Details

Category of proposed event (SELECT ALL THAT APPLY)

New Event Annual Event Multi-day event Multi-week/month event

Event Dates (Not including set-up/tear-down, ONLY dates of event open to the public)

Start	End	# of Days	Disbursement Date	Season
9/23/2024	9/25/2024	3	11/24/2024	Shoulder

Attendance Details

Anticipated TOTAL number of attendees for duration of event?
3000

% Day visitors	% Overnight Visitors	Total Room Nights
80.00	20.00	1200

How Did you determine Attendance Figures?

Zipcode? Surveys? Other? Description

Anticipate Working With Someone

What geographic areas do you anticipate your marketing reaching?

Who is your target audience and/or demographic?

Who will you be working with? If you are working with a Chamber of Commerce or CVB, etc., please click on this box. A drop-down window will appear for you to fill out.

Our collaboration with you and your partners results in a more successful event experience for everybody!

← Tourism Occupancy Tax Application v2 **Event Details** Home

Event Details

Category of proposed event (SELECT ALL THAT APPLY)

New Event Annual Event Multi-day event Multi-week/month event

Event Dates (Not including set-up/tear-down, ONLY dates of event open to the public)

Start	End	# of Days	Disbursement Date	Season
9/23/2024	9/25/2024	3	11/24/2024	Shoulder

Attendance Details

Anticipated TOTAL number of attendees for duration of event?

3000

% Day visitors	% Overnight Visitors	Total Room Nights
80.00	20.00	1200

How do you determine Attendance Figures?

Zipcode? Other? Description

Ticket Sales platforms are a good indicator of attendance for this event

Anticipate Working With Someone

Who will you be working with?

Organization

Contact Name

Contact Phone

What geographic areas do you anticipate your marketing reaching?

Who is your target audience and/or demographic?

Please list all of the geographic areas you will be marketing to, including local, regional and national markets. The more detail the better, so we can assist in your efforts!

Finally, who is your target audience and demographic.

← Tourism Occupancy Tax Application v2 Event Details Home ☰

Event Details

Category of proposed event (SELECT ALL THAT APPLY)

New Event Annual Event Multi-day event Multi-week/month event

Event Dates (Not including set-up/tear-down, ONLY dates of event open to the public)

Start	End	# of Days	Disbursement Date	Season
9/23/2024	9/25/2024	3	11/24/2024	Shoulder

Attendance Details

Anticipated TOTAL number of attendees for duration of event?

% Day visitors % Overnight Visitors Total Room Nights

How Did you determine Attendance Figures?
Zipcode? Surveys? Other?

Description

Participate Working With Someone

Who will you be working with?

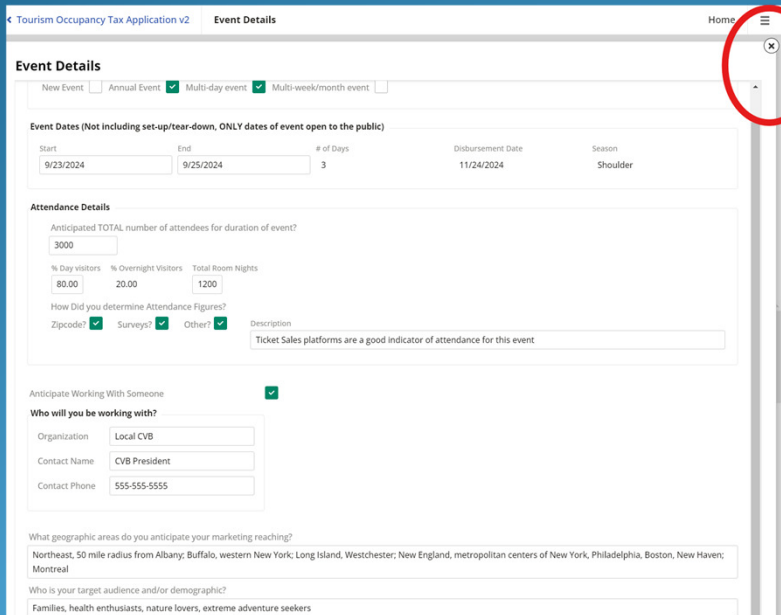
Organization
Contact Name
Contact Phone

What geographic areas do you anticipate your marketing reaching?

Who is your target audience and/or demographic?

After completing the last question, look over all of your information and click the circled “X” in the upper left-hand corner of your screen (shown in the left diagram below). This will open your home screen and turn your “Event Details” tab green, indicating you have completed the section and can move on to the next tab.

Click on the “Location(s)” tab ...



Event Details

New Event Annual Event Multi-day event Multi-week/month event

Event Dates (Not including set-up/tear-down. ONLY dates of event open to the public)

Start	End	# of Days	Disbursement Date	Season
9/23/2024	9/25/2024	3	11/24/2024	Shoulder

Attendance Details

Anticipated TOTAL number of attendees for duration of event?
3000

% Day visitors: 80.00, % Overnight Visitors: 20.00, Total Room Nights: 1200

How Did you determine Attendance Figures?
Zipcode? Surveys? Other? Description: Ticket Sales platforms are a good indicator of attendance for this event

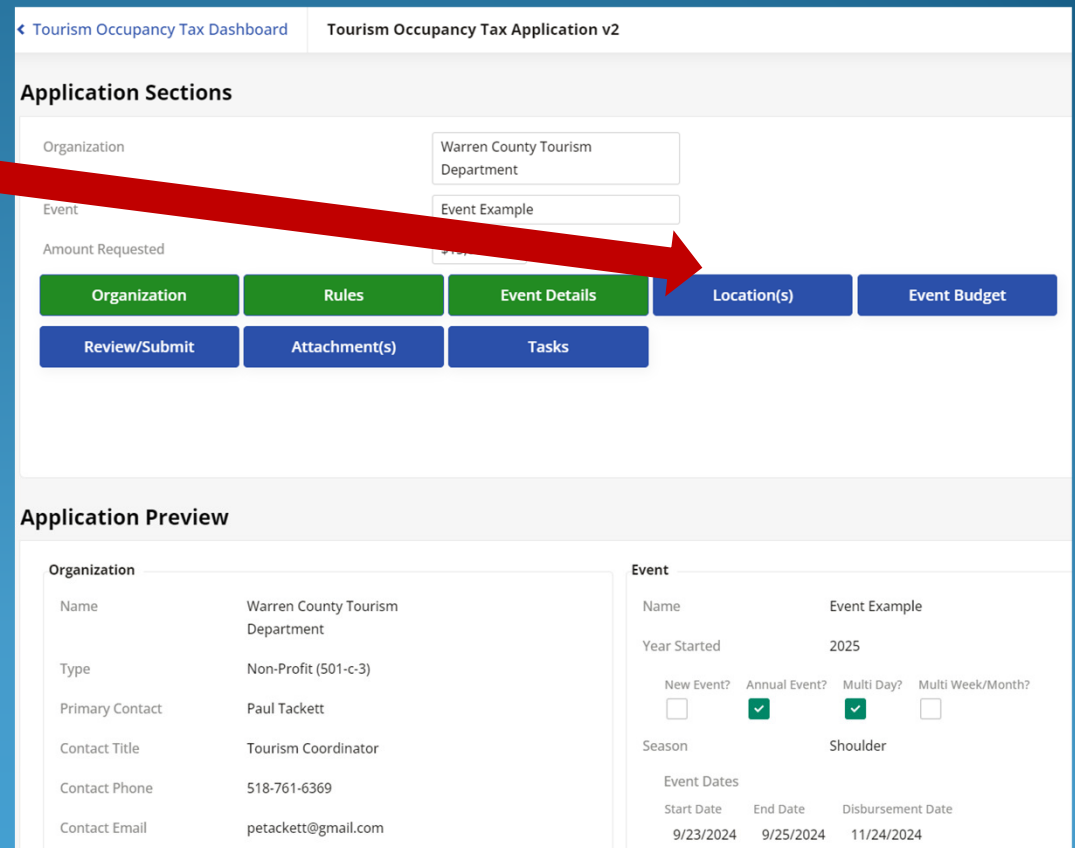
Anticipate Working With Someone

Who will you be working with?

Organization: Local CVB
Contact Name: CVB President
Contact Phone: 555-555-5555

What geographic areas do you anticipate your marketing reaching?
Northeast, 50 mile radius from Albany; Buffalo, western New York; Long Island, Westchester; New England, metropolitan centers of New York, Philadelphia, Boston, New Haven; Montreal

Who is your target audience and/or demographic?
Families, health enthusiasts, nature lovers, extreme adventure seekers



Tourism Occupancy Tax Application v2

Application Sections

Organization: Warren County Tourism Department
Event: Event Example
Amount Requested: \$1000

Organization Rules Event Details Location(s) Event Budget

Review/Submit Attachment(s) Tasks

Application Preview

Organization		Event	
Name	Warren County Tourism Department	Name	Event Example
Type	Non-Profit (501-c-3)	Year Started	2025
Primary Contact	Paul Tackett	New Event? <input type="checkbox"/>	Annual Event? <input checked="" type="checkbox"/>
Contact Title	Tourism Coordinator	Multi Day? <input checked="" type="checkbox"/>	Multi Week/Month? <input type="checkbox"/>
Contact Phone	518-761-6369	Season	Shoulder
Contact Email	petackett@gmail.com	Event Dates	
		Start Date	End Date
		9/23/2024	9/25/2024
		Disbursement Date	11/24/2024

Location of Event (Add all that apply)

Add Location

↓ Municipality

Venue

Now the Location of Event screen appears. Click on the “Add Location” tab and a drop-down box will appear. Click on the small arrow at the far right of the window to drop down the municipality menu.

Select the municipality where the event will take place.

← Tourism Occupancy Tax Application v2 Municipality Home

Location of Event (Add all that apply)

Add Location

↓ Municipality Venue

✓ ✕

Search...

- Bolton
- Chester
- City of Glens Falls
- Hague
- Horicon
- Johnsburg
- Lake George
- Lake Luzerne
- Queensbury

Venue

The screenshot shows a web application interface for 'Tourism Occupancy Tax Application v2'. The main heading is 'Location of Event (Add all that apply)'. Below this heading is a blue button labeled 'Add Location'. Underneath the button is a form with two main sections: 'Municipality' and 'Venue'. The 'Municipality' section has a dropdown arrow on its right side, which is currently open, showing a list of municipalities: Bolton, Chester, City of Glens Falls, Hague, Horicon, Johnsburg, Lake George, Lake Luzerne, and Queensbury. The 'Venue' section is a simple text input field. At the top of the page, there are navigation links for 'Home' and a hamburger menu icon. The background of the entire image is a blue gradient.

After selecting the municipality, type in the venue(s) that will host the event. Then, click on the check mark to lock in your Location.

The screenshot shows the 'Location of Event' section of a web application. At the top, there is a navigation bar with a back arrow, the text 'Tourism Occupancy Tax Application v2', and the title 'Municipality'. On the right side of the navigation bar are the words 'Home' and a hamburger menu icon. Below the navigation bar, the section is titled 'Location of Event (Add all that apply)'. There is a blue button labeled 'Add Location'. Below this, there are two input fields: 'Municipality' and 'Venue'. The 'Municipality' field contains 'City of Glens Falls' and has a blue checkmark icon to its left and a red 'x' icon to its right. The 'Venue' field contains the text 'Glens Falls City Park, Maple Street and Ridge Street from the Circle to Washington'. A red arrow points from the text above to the checkmark icon in the 'Municipality' field.

Clicking on the check mark (above) will replace the check mark icon with a trash icon and activate the “Add Location” tab so that the applicant is able to add more locations. Remember to click that check mark after adding municipality and venue each time!

This screenshot shows the same 'Location of Event' section as the previous one, but after the checkmark has been clicked. The 'Municipality' field now contains a red trash can icon to its left, indicating it has been removed from the list. The 'Venue' field remains the same. The blue 'Add Location' button is now active. A red arrow points from the text above to the trash can icon in the 'Municipality' field.

Once all of the locations are in place, and the check marks have turned to trash icons, review them carefully before moving on.

When ready to move on, click on the circled "X"

Location of Event (Add all that apply)

Municipality	Venue
City of Glens Falls	Glens Falls City Park, Maple Street and Ridge Street from the Circle to Washington
City of Glens Falls	Crandall Park

Application Sections

Organization: Warren County Tourism Department

Event: Event Example

Amount Requested: \$15,000.00

Organization Rules Event Details **Location(s)** Event Budget

Review/Submit Attachment(s) Tasks

Applicant will be returned to the Home Page and the "Locations" tab will be turned green, indicating all fields have been filled. Next, click on "Event Budget" tab

The Event Budget section consists to two line items, “Expense Items” and “Revenue Items” and two phases of completion; the estimating figures provided in the application process, and the actual figures reported following the event and supported by documentation.

[← Tourism Occupancy Tax Application v2](#)
Application_EventBudget
Home

My Expense Items

[Add Expense Items](#)

0 rows

Category	Item	Description	Estimated Amount

My Revenue Items

[Add Revenue Items](#)

1 row

Revenue Source	Municipality	Description	Estimated Amou
Warren County			\$15,000.00
			\$15,000.00

Organization	Event	Period	Status	Block	Edit	Delete	
Warren County Tourism Department	Event Example	2024	In Progress				0

For purposes of this instruction, we will focus on the estimated figures furnished during the application period. From this screen, the applicant will click on the “Add Expense Items” tab.

Navigation: < Tourism Occupancy Tax Application v2 | Application_EventBudget | Home

My Expense Items

[Add Expense Items](#)

0 rows

Search

Category	Item	Description	Estimated Amount
----------	------	-------------	------------------

My Revenue Items

[Add Revenue Items](#)

1 row

Search

Revenue Source	Municipality	Description	Estimated Amount
Warren County			\$15,000.00
			\$15,000.00

Organization	Event	Period	Status	Block Edit Delete	0
Warren County Tourism Department	Event Example	2024	In Progress		

This menu of expenses appears for the applicant. Most categories of expense are represented in this list, with some examples listed in the “Item” column beside the category. The applicant will report all expenses from this list. There is an “Other” option that should be used sparingly.

Application_EventBudget Occ Tax Add Expense Items Home

All Expense Items

38 rows

Search

	Category	Item
Add Expense	Paid Personnel	Re-enactors, musicians, entertainers, umpires for games
Add Expense	Paid Advertising	Promoting Events, attractions, activities, packages, conventions, sporting events, tradeshow
Add Expense	Paid Advertising	Print, Radio, Television and Internet
Add Expense	Paid Advertising	Email Campaigns
Add Expense	Paid Advertising	Social Media Campaigns
Add Expense	Hanging Banner Ads	Hanging Banner Ads
Add Expense	Signage Outdoor	Banners, billboards
Add Expense	Directional Signage	Event-specific directional signage
Add Expense	Promotional Items	Posters, flyers, brochures, etc
Add Expense	Photo/Video Promotion	Promotional videography, photography promoting the event
Add Expense	Postage	Event-related postage for direct mail campaigns
Add Expense	Postage	Brochure Distribution
Add Expense	Website Design	Event-specific website design, development, updates
Add Expense	Logo Design	Event-specific logo design
Add Expense	Maps/Free Guides	Maps, free guides, tours of regional area, bicycle routes, snowmobile trails
Add Expense	Venue Rental	EXCLUDING any and all county/municipal owned properties
Add Expense	Event-Related Rentals/Purchases	Event Related Rentals and Expenditures (Tents, Chairs, Tables, etc)
Add Expense	Health/Hygiene Expenses	Portable Toilets, Handwashing Stations, Public Health Related Expenses

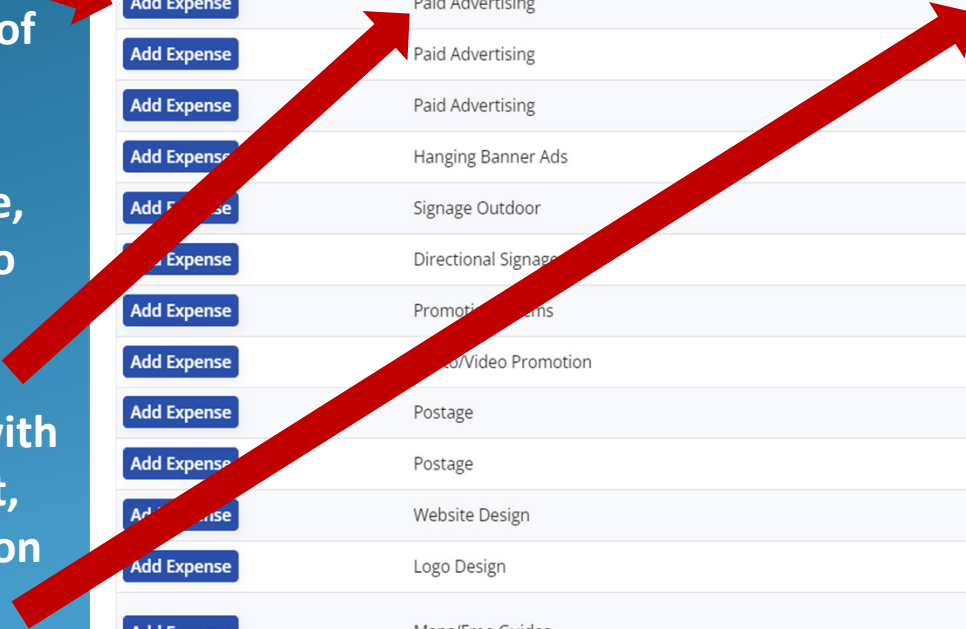
All Expense Items

38 rows

	Category	Item
Add Expense	Paid Personnel	Re-enactors, musicians, entertainers, umpires for games
Add Expense	Paid Advertising	Promoting Events, attractions, activities, packages, conventions, sporting events, tradeshow
Add Expense	Paid Advertising	Print, Radio, Television and Internet
Add Expense	Paid Advertising	Email Campaigns
Add Expense	Paid Advertising	Social Media Campaigns
Add Expense	Hanging Banner Ads	Hanging Banner Ads
Add Expense	Signage Outdoor	Banners, billboards
Add Expense	Directional Signage	Event-specific directional signage
Add Expense	Promotional Items	Posters, flyers, brochures, etc
Add Expense	Photo/Video Promotion	Promotional videography, photography promoting the event
Add Expense	Postage	Event-related postage for direct mail campaigns
Add Expense	Postage	Brochure Distribution
Add Expense	Website Design	Event-specific website design, development, updates
Add Expense	Logo Design	Event-specific logo design
Add Expense	Maps/Free Guides	Maps, free guides, tours of regional area, bicycle routes, snowmobile trails
Add Expense	Venue Rental	EXCLUDING any and all county/municipal owned properties
Add Expense	Event-Related Rentals/Purchases	Event Related Rentals and Expenditures (Tents, Chairs, Tables, etc)
Add Expense	Health/Hygiene Expenses	Portable Toilets, Handwashing Stations, Public Health Related Expenses

Scroll down the menu of expenses and select a category by clicking on the "Add Expense" tab to the left of the category.

In this example, we are going to select the category "Paid Advertising" with the Item "Print, Radio, Television and Internet."



The detail window will appear. Please fill in the description with as much detail as possible. And then fill in the estimated expense you anticipate. Expenses reported with inadequate or no description may be ineligible for funding.

Once this is complete, select "Save"

ApplicationBudget_AddExpense

All Expense Items

Search

Category

Item

Description

Estimated Amount

Save Cancel

Paid Advertising

Print, Radio, Television and Internet

Advertising in Chronicle, The Post Star, WCKM Radio

2500

ners, u

activities

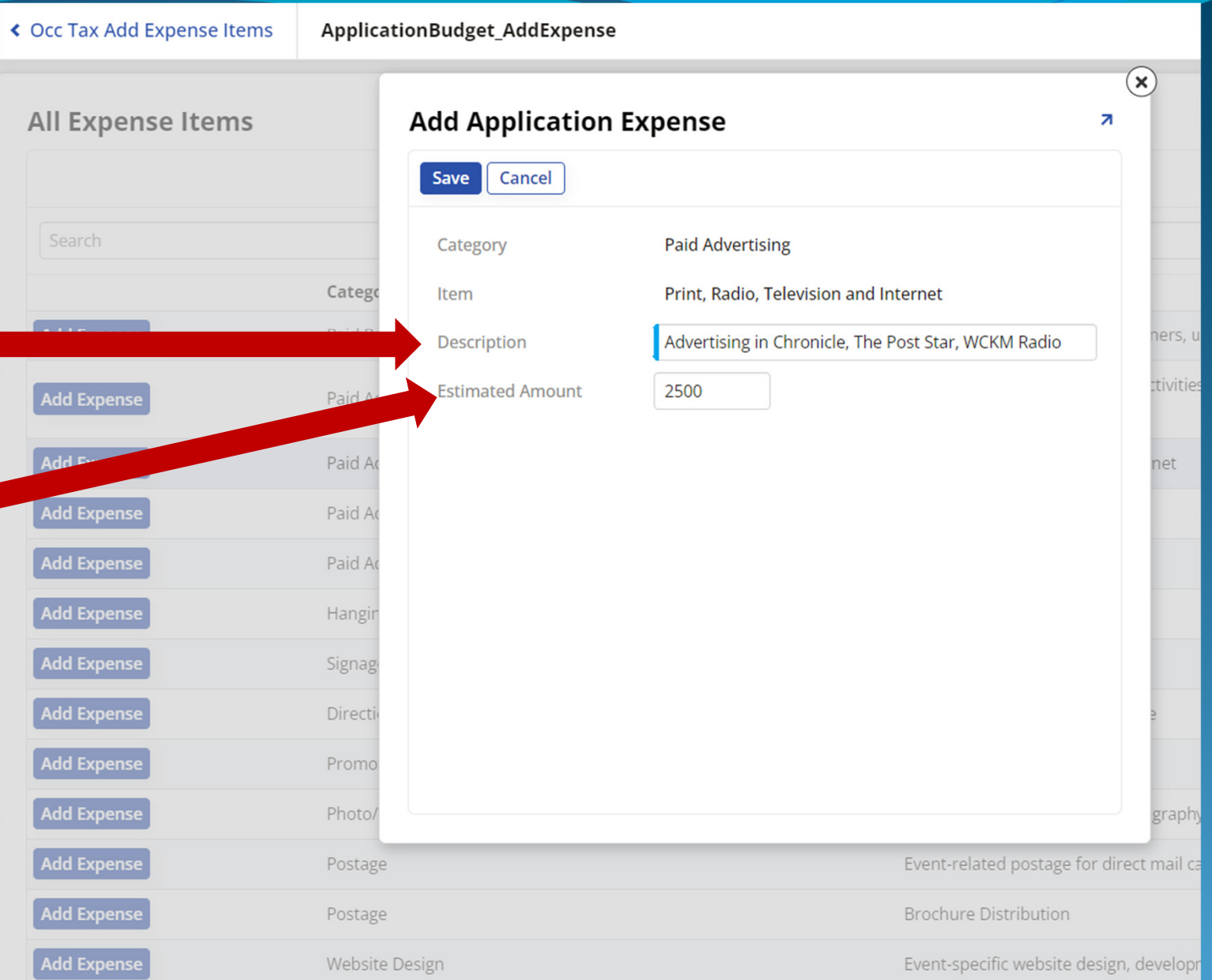
net

graphy

Event-related postage for direct mail ca

Brochure Distribution

Event-specific website design, developr

The image shows a software interface for adding an expense. A modal window titled 'Add Application Expense' is open over a background of a table with 'All Expense Items'. The modal has a 'Save' button and a 'Cancel' button. It contains fields for 'Category' (Paid Advertising), 'Item' (Print, Radio, Television and Internet), 'Description' (Advertising in Chronicle, The Post Star, WCKM Radio), and 'Estimated Amount' (2500). Two red arrows point from the left-side text to the 'Description' and 'Estimated Amount' fields in the modal.

As the applicant saves each expense item, they will be aggregated at the bottom of the screen for review. Include all expenses anticipated for the event.

Following the event, reporting of actual expenses should mostly align with the estimated expenses.

Application_EventBudget		Occ Tax Add Expense Items		Home
Add Expense	External Marketing	Event specific external marketing services		
Add Expense	Public Relations	Public relations to promote event		
Add Expense	Insurance	Insurance Costs		
Add Expense	Security	Event security, emergency services		
Add Expense	Payroll Expenses	Payroll, Salaries		
Add Expense	County-owned Venue Rental	County-Owned Venue Rental		
Add Expense	Lodging	Staff Lodging		
Add Expense	Meals	Staff Meals		
Add Expense	Travel	Staff Travel Expenses		
Add Expense	Alcohol	Alcohol		
Add Expense	Charity Donations	Charitable Donations		
Add Expense	Mileage	Staff Mileage		
Add Expense	Operating Costs	Annual operating, administrative and maintenance costs		
Add Expense	Awards	Awards to participants		
Add Expense	Capital Expenses	Capital Programs		
Add Expense	Set-up/Clean-up	Set-up, clean-up of event		
Add Expense	Volunteer Stipends	Volunteer Stipends		
Add Expense	Other	Other		

Application Expenses (Current)				
Category	Item	Other	Est. Amount	Actual Amount
Paid Advertising	Print, Radio, Television and Internet	Advertising in Chronicle, The Post Star, WCKM Radio	\$2,500.00	
			\$2,500.00	

Once all of the expenses have been added in the Budget, review carefully and then click on the circled "X" at the top right of the screen. This will bring you back to the main Event Budget Page.

Note the sample expenses budget here. Any blank "Other" column should be edited to include a clear description of the expense.

< Application_EventBudget
Occ Tax Add Expense Items
Home
☰

Add Expense	Alcohol	Alcohol	
Add Expense	Charity Donations	Charitable Donations	
Add Expense	Mileage	Mileage	
Add Expense	Operating Costs	Annual operating, administrative and maintenance costs	
Add Expense	Awards	Awards to participants	
Add Expense	Capital Expenses	Capital Programs	
Add Expense	Set-up/Clean-up	Set-up, clean-up of event	
Add Expense	Volunteer Stipends	Volunteer Stipends	
Add Expense	Other	Other	

X

Application Expenses (Current)

7 rows

Category	Item	Other	Est. Amount	Actual Amount
Paid Personnel	Re-enactors, musicians, entertainers, umpires for games	Bands to play in City Park and Crandall Park	\$4,500.00	
Paid Advertising	Print, Radio, Television and Internet	Advertising in Chronicle, The Post Star, WCKM Radio	\$2,500.00	
Signage Outdoor	Banners, billboards	Banner over Glen Street	\$2,500.00	
Promotional Items	Posters, flyers, brochuers, etc	Printing and distribution of flyers and brochures	\$1,500.00	
Venue Rental	EXCLUDING any and all county/municipal owned properties	Rental of City Park, Crandall Park	\$6,500.00	
Health/Hygiene Expenses	Portable Toilets, Handwashing Stations, Public Health Related Expenses	Portable toilets	\$1,500.00	
Health/Hygiene Expenses	Portable Toilets, Handwashing Stations, Public Health Related Expenses	Trash removal	\$600.00	
			\$19,600.00	

The main Event Budget page will list all of the expenses the applicant selected and reported. Now, the same process applies for the “Revenue Item.”

Click on the “Add Revenue Items” tab.

← Tourism Occupancy Tax Application v2 Application_EventBudget Home ☰

My Expense Items

[Add Expense Items](#) ↗

7 rows

	Category	Item	Description	Estimated Amount
🗑	Paid Personnel	Re-enactors, musicians, entertainers, umpires for games	Bands to play in City Park and Crandall Park	\$4,500.00
🗑	Paid Advertising	Print, Radio, Television and Internet	Advertising in Chronicle, The Post Star, WCKM Radio	\$2,500.00
🗑	Signage Outdoor	Banners, billboards	Banner over Glen Street	\$2,500.00
🗑	Promotional Items	Posters, flyers, brochures, etc	Printing and distribution of flyers and brochures	\$1,500.00
🗑	Venue Rental	EXCLUDING any and all county/municipal owned properties	Rental of City Park, Crandall Park	\$6,500.00
🗑	Health/Hygiene Expenses	Portable Toilets, Handwashing Stations, Public Health Related Expenses	Portable toilets	\$1,500.00
🗑	Health/Hygiene Expenses	Portable Toilets, Handwashing Stations, Public Health Related Expenses	Trash removal	\$600.00
				\$19,600.00

My Revenue Items

[Add Revenue Items](#) ↗

1 row

	Municipality	Description	Estimated Amou
	Warren County		\$15,000.00
			\$15,000.00

The Revenues page works the same as the expenses. Note that the Warren County Occupancy Tax request has automatically been added to the applicant's revenue report.

Click on "Add Revenue" tab consistent with the revenue source you want to report.

Application_EventBudget Occ Tax Add Revenue Items Home

All Revenue Items

8 rows

Search

Revenue Source	
Warren County	
Add Revenue	Municipal/Town Village
Add Revenue	Sponsorship Total
Add Revenue	Ticket Sales, Registration Fee
Add Revenue	Fundraising, Donations
Add Revenue	Merchandising Sales
Add Revenue	Vendor Fees
Add Revenue	Other

Application Revenues (Current)

1 row

Revenue Source	Municipality	Other	Est. Amount	Actual Amount
Warren County			\$15,000.00	
			\$15,000.00	

The applicant is required to report all revenue sources for the event, including any municipal funds, in this sample case, a Glens Falls City Occupancy Tax award.

Make sure to always include a description of the revenue source. Any inadequate or missing information may affect reimbursement.

Once the information is added and reviewed, select "Save"

The screenshot displays a software interface for adding application revenue. A modal window titled "Add Application Revenue" is open, showing the following fields:

- Revenue Source: Municipal/Town Village
- Municipality: City of Glens Falls
- Other: Occupancy Tax Funding from City of C
- Estimated Amount: 2500

A red arrow points from the text on the left to the "Other" field. The background shows a table of "All Revenue Items" with a search bar and several "Add Revenue" buttons. Below the modal, a table titled "Application Revenues (Curr)" is partially visible, showing columns for Revenue Source, Municipality, Other, Est. Amount, and Actual Amount.

Revenue Source	Municipality	Other	Est. Amount	Actual Amount
Warren County			\$15,000.00	
			\$15,000.00	

Notice that as the applicant adds revenue items, the total is aggregating on the page.

Once satisfied with the Revenue Budget, the applicant may click the circled "X" to return to the Event Budget page.

Application_EventBudget Occ Tax Add Revenue Items Home

All Revenue Items

8 rows

Revenue Source
Warren County
Municipal/Town Village
Sponsorship Total
Occupancy Tax, Registration Fee
Fundraising, Donations
Merchandising Sales
Vendor Fees
Other

Application Revenues (Current)

4 rows

Revenue Source	Municipality	Other	Est. Amount	Actual Amount
Warren County			\$15,000.00	
Municipal/Town Village	City of Glens Falls	Occupancy Tax Funding from City of Glens Falls	\$2,500.00	
Sponsorship Total		Corporate sponsorships	\$2,000.00	
Vendor Fees		Vendor fees	\$4,500.00	
			\$24,000.00	

The applicant is returned to the Event Budget Page that shows all expenses and all revenues reported. Once satisfied with this, the applicant may click on the circled "X" at the top of the page.

← Tourism Occupancy Tax Application v2 Application_EventBudget Home ☰

My Expense Items

[Add Expense Items](#)

4 rows

Search

	Category	Item	Description	Estimated Amount
🗑️	Paid Personnel	Re-enactors, musicians, entertainers, umpires for games	Bands to play in City Park, Crandall Park	\$4,500.00
🗑️	Paid Advertising	Print, Radio, Television and Internet	Advertising in The Post Star, WCKM Radio	\$2,500.00
🗑️	Signage Outdoor	Banners, billboards	Banner over Glen Street	\$2,500.00
🗑️	Promotional Items	Posters, flyers, brochures, etc	Printing and distribution of flyers and brochures	\$1,500.00
🗑️	Venue Rental	EXCLUDING any and all county/municipal properties	Rental of City Park, Crandall Park	\$6,500.00
🗑️	Health/Hygiene Expenses	Portable Toilets, Handwashing Stations, Public Health Related Expenses	Portable toilets	\$1,500.00
🗑️	Health/Hygiene Expenses	Portable Toilets, Handwashing Stations, Public Health Related Expenses	Trash removal	\$600.00
				\$19,600.00

My Revenue Items

[Add Revenue Items](#)

4 rows

Search

	Revenue Source	Municipality	Description	Estimated Amount
	Warren County			\$15,000.00
🗑️	Municipal/Town Village	City of Glens Falls	Occupancy Tax Funding from City of Glens Falls	\$2,500.00
🗑️	Sponsorship Total		Corporate sponsorships	\$2,000.00
🗑️	Vendor Fees		Vendor fees	\$4,500.00
				\$24,000.00

☒

The applicant is returned to the application home page with the "Event Budget" tab turned green. This indicates that all information was adequately provided.

Next, the applicant may click on the Review/Submit tab.

Application Sections

Organization: Warren County Tourism Department

Event: Event Example

Amount Requested: \$15,000.00

Organization Rules Event Details Location(s) **Event Budget**

Review/Submit Attachment(s) Tasks

Application Preview

Organization Name: Warren County Tourism Department

Organization Type: Non-Profit (501-c-3)

Primary Contact: Paul Tackett

Contact Title: Tourism Coordinator

Contact Phone: 518-761-6369

Contact Email: petackett@gmail.com

Event Name: Event Example

Year Started: 2025

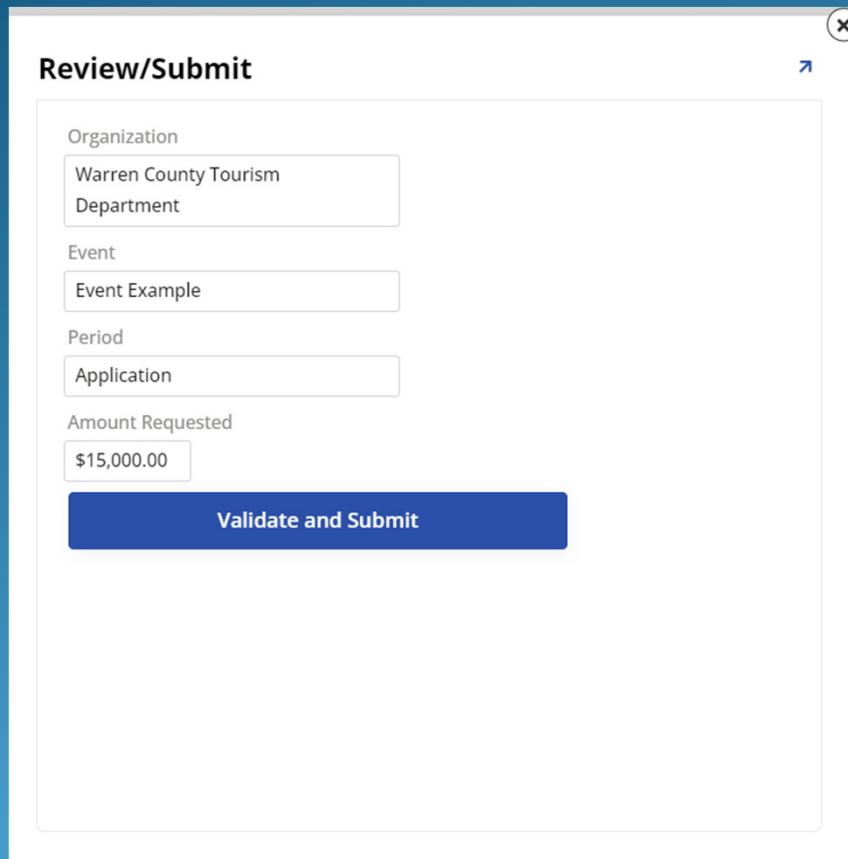
New Event? Annual Event? Multi Day? Multi Week/Month?

Season: Shoulder

Event Dates

Start Date	End Date	Disbursement Date
9/23/2024	9/25/2024	11/24/2024

The applicant is brought first to this screen to select “Validate and Submit”



Review/Submit

Organization
Warren County Tourism
Department

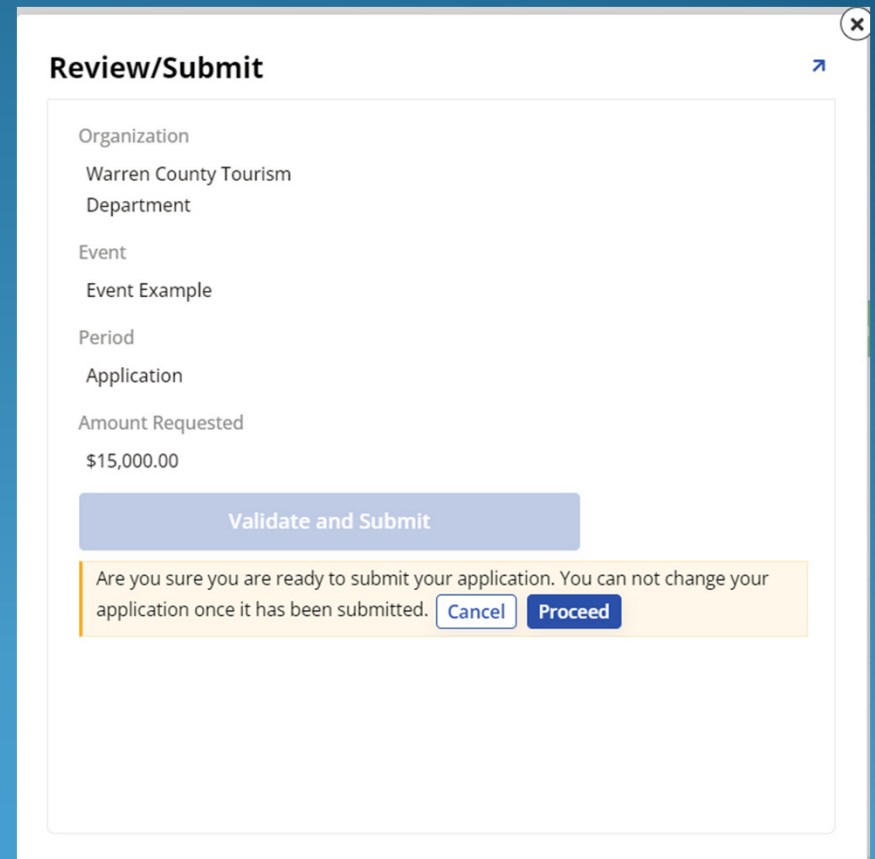
Event
Event Example

Period
Application

Amount Requested
\$15,000.00

Validate and Submit

The applicant is notified that by proceeding, nothing can be changed on the application. Click “Proceed”



Review/Submit

Organization
Warren County Tourism
Department

Event
Event Example

Period
Application

Amount Requested
\$15,000.00

Validate and Submit

Are you sure you are ready to submit your application. You can not change your application once it has been submitted. **Cancel** **Proceed**

Although the applicant has selected “Proceed” in the previous step, this window will appear.

Note that there is a “Validate and Submit” tab on the screen above the acknowledgement that the application has been submitted.

Click on the circled “X” at top right to return to the main screen.

Review/Submit

Organization

Warren County Tourism
Department

Event

Event Example

Period

Application

Amount Requested

\$15,000.00

Validate and Submit

✔ Your application has been submitted to Warren County Tourism for review and processing!

The applicant has been brought back to the main page of the Application.

Here, most of the work is done. If there is any documentation that the applicant would like to submit, the "Attachment" tab affords that opportunity.

Click on that tab.

[← Tourism Occupancy Tax Dashboard](#) **Tourism Occupancy Tax Application v2**

Application Sections

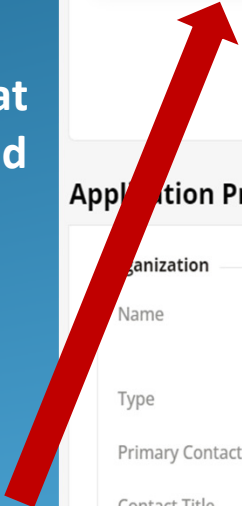
Organization	Warren County Tourism Department
Event	Event Example
Amount Requested	\$15,000.00

[Organization](#) [Rules](#) [Event Details](#) [Location\(s\)](#) [Event Budget](#)

[Attachment\(s\)](#) [Tasks](#)


Application Preview

Organization	Event		
Name Warren County Tourism Department	Name Event Example		
Type Non-Profit (501-c-3)	Year Started 2025		
Primary Contact Paul Tackett	New Event? <input type="checkbox"/> Annual Event? <input checked="" type="checkbox"/> Multi Day? <input checked="" type="checkbox"/> Multi Week/Month? <input type="checkbox"/>		
Contact Title Tourism Coordinator	Season Shoulder		
Contact Phone 518-761-6369	Event Dates		
Contact Email @gmail.com	Start Date 9/23/2024	End Date 9/25/2024	Disbursement Date 11/24/2024



The applicant is brought to this screen. To upload a document, click “Add Attachment”


Attachments ↗

[Add Attachment](#) 0 rows 

File	File Name	Description
------	-----------	-------------

The applicant is brought to this screen, where by clicking “Browse” a document may be selected and uploaded. Note that in this mode, the “Add Attachment” is unavailable.

Attachments ↗

[Add Attachment](#) 0 rows 

File	File Name	Description
<input type="checkbox"/> <input type="checkbox"/>	<input type="text" value=""/> Browse ...	<input type="text"/>

After uploading the document, the applicant must include a description of its contents.

Attachments

Add Attachment

0 rows

Search

File	File Name	Description
<input checked="" type="checkbox"/> <input type="checkbox"/> Attachment A.pdf <input type="button" value="Remove"/> <input type="button" value="Browse ..."/>	Attachment A.pdf	Summary of Event for Committee

To lock in the attachment, the applicant clicks on the “check” tab at the left. Doing that turns the check and X icons to edit and trash icons. This means the attachment has been saved.

Continue to add attachments, or return to the main page by clicking on the circled “X”

Attachments

Add Attachment

1 row

Search

File	File Name	Description
<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="button" value="Edit"/> <input type="button" value="Trash"/> 27KB	Attachment A.pdf	Summary of Event for Committee

The “Task” button will be more relevant upon approval of the application. Tasks will be automatically generated and the awardee will receive email notifications to log back into the application to complete these tasks. Such tasks include acknowledging receipt of award letter, rules and guidelines, as well as signing the contract and providing documents such as insurance certificate, W9, etc.

< Tourism Occupancy Tax Dashboard Tourism Occupancy Tax Application v2

Application Sections

Organization	Warren County Tourism Department
Event	Event Example
Amount Requested	\$15,000.00

Organization Rules Event Details Location(s) Event Budget

Attachment(s) **Tasks**

Application Preview

Organization		Event			
Name	Warren County Tourism Department	Name	Event Example		
Type	Non-Profit (501-c-3)	Year Started	2025		
Primary Contact	Paul Tackett	New Event?	Annual Event?	Multi Day?	Multi Week/Month?
Contact Title	Tourism Coordinator	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Phone	518-761-6369	Season	Shoulder		
Contact Email	@gmail.com	Event Dates			
		Start Date	End Date	Disbursement Date	
		9/23/2024	9/25/2024	11/24/2024	

The awardee will receive an email when the award has been made, along with task instructions. Those tasks are listed in this window. Note Pre-Event tasks and Post-Event Tasks.

Application Tasks 9 rows

Title	Note	Due Date	Date Completed	Comment	Task Type	Task Details
Acknowledge Award Letter and Marketing Guidelines		6/25/2024	8/23/2024 12:52 PM	<input type="text"/>	Pre-Event	Award Letter
General Liability Insurance Certificate		6/25/2024		<input type="text"/>	Pre-Event	General Liability Insurance
Employee Documents		6/25/2024		<input type="text"/>	Pre-Event	Employee Documents
Taxpayer ID (W9)		6/25/2024		<input type="text"/>	Pre-Event	Taxpayer ID (W9)
County Voucher		11/24/2024		<input type="text"/>	Post-Event	County Voucher
Event Summary	1 to 2 page summary of event	11/24/2024		<input type="text"/>	Post-Event	Event Summary
Eligible Expense Receipts		11/24/2024		<input type="text"/>	Post-Event	Expense Receipt
Visitor Survey Summary		11/24/2024		<input type="text"/>	Post-Event	Visitor Survey Summary
Update Actual Budget		11/24/2024		<input type="text"/>	Post-Event	

The first task is to acknowledge receipt of the award letter and guidelines. Do this by clicking on that task, in this case “Award Letter”

The awardee can then read the letter and acknowledge by entering a short sentence stating such in the “Comment” box. All “Comment” boxes must be completed. This document can be printed out, or downloaded by awardee. Once finished, click the small, circled “X”



Title Acknowledge Award Letter and Marketing Guidelines

Note

Comment I have read and acknowledge the Award Letter and guidelines

Award Letter

1 of 5 Automatic Zoom



Dear Awardee,
Congratulations on your grant award! Grants are disbursed in the form of reimbursement, so please review the application rules, eligibility, guidelines and deadlines carefully and prepare to submit supporting documentation demonstrating expenditures on eligible uses of funds.

Please provide the following within 90 days prior to your event dates:

- Branding:** The Warren County Tourism Logo, VISIT THE Lake George Area IN NEW YORK'S ADIRONDACKS, must appear prominently in all advertising and publicity (both written and/or electronic) in order to receive Special Event marketing funding. Please review the **Marketing Guidelines and Logo Usage Requirements** below. By acknowledging this policy, the applicant agrees to abide by all guidelines and requirements stated herein and

Clicking back to the main Task screen, you'll see that the "Date Completed" column has been filled, as well as the "Comment" field. The applicant can then move on to the other tasks. The more tasks completed early on, the better. **The day after the event concludes, another email will arrive advising of Post-Event tasks that must be completed before awards are paid out:**



Application Tasks

9 rows

Title	Note	Due Date	Date Completed	Comment	Task Type	Task Details
Acknowledge Award Letter and Marketing Guidelines		6/25/2024	8/23/2024 12:52 PM	I have read and acknowledge the Award Letter and guidelines	Pre-Event	Award Letter
General Liability Insurance Certificate		6/25/2024			Pre-Event	General Liability Insurance
Employee Documents		6/25/2024			Pre-Event	Employee Documents
Taxpayer ID (W9)		6/25/2024			Pre-Event	Taxpayer ID (W9)
County Voucher		11/24/2024			Post-Event	County Voucher
Event Summary	1 to 2 page summary of event	11/24/2024			Post-Event	Event Summary
Eligible Expense Receipts		11/24/2024			Post-Event	Expense Receipt
Visitor Survey Summary		11/24/2024			Post-Event	Visitor Survey Summary
Update Actual Budget		11/24/2024			Post-Event	



Application Sections

Organization: Warren County Tourism Department
Event: Event Example
Amount Requested: \$15,000.00

- Organization
- Rules
- Event Details
- Location(s)
- Event Budget
- Attachment(s)
- Tasks

Application Preview

Organization

Name: Warren County Tourism Department
Type: Non-Profit (501-c-3)
Primary Contact: Paul Tackett
Contact Title: Tourism Coordinator
Contact Phone: 518-761-6369
Contact Email: @gmail.com

Mailing Address

Address 1: 1340 State Route 9
Address 2:
City: Lake George
State: NY

Event

Name: Event Example
Year Started: 2025
New Event? Annual Event? Multi Day? Multi Week/Month?
Season: Shoulder
Event Dates:
Start Date: 9/23/2024 End Date: 9/25/2024 Disbursement Date: 11/24/2024

Application Info

Period: 2024
Status: Submitted
Amount Requested: \$15,000.00
Amount Awarded:

At this point, the Application is complete and submitted. **Keep an eye on your email inbox for correspondence.**

This is the main means of communication to track all activity relevant to your application and award. But for now, you are done! Sign out of the platform by clicking on the menu icon above.



Thank
you!