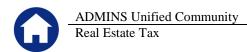
# REAL ESTATE TAX BILLING RELEASE NOTES – DECEMBER 2016

This document explains new product enhancements added to the ADMINS Unified Community for Windows **REAL ESTATE TAX** system.

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### 1. TABLES

The tax rate table has been enhanced to allow for a split between Municipal and School rates as a site specific change for a community. Contact <u>support@admins.com</u> if your site uses this type of split rate to arrange for it to display on your forms.

#### 1.1. Tax Rate Table [New]

In the example below, the full tax rate is \$33.68, and is made up of the \$15.49 for the Municipal rate plus the \$18.19 for the school rate.

15.49 <u>18.19</u> 33.68

	Tax Rate Table [TRAINING]
Tax Rate Table	Year 2017 Type 10 Real Estate
Year 2017 Type 10 Real Estate District 1 Parcel Class 1 Residential	District     1       Parcel Class     0     Mixed-Use       Bill Category     01     RE     Tax
Parcel Class     1     Residential       Bill Category     01     Tax	Apply To:
Apply To: <ul> <li>Percentage of Value</li> <li>Value Over</li> <li>Minimum Value</li> <li>First \$</li> <li>of Value</li> <li>Percentage of Tax</li> <li>Value Excertange on 00</li> <li>Value Exempt</li> </ul>	C Percentage of Value     C Value Over     C Value Over     C First S     C Percentage of Tax     As Surcharge on 00     Value     C Percentage of Tax     C C Oross
Calculated on C Net C Gross	Calculation: Flat Amount Tax Rate 33,68 Per 1000,00
Calculation:	
Tax Rate 14,66 Per 1000,00	Minimum Tax Required Maximum Tax Required
Minimum Tax Required Maximum Tax Required	Municipal Tax Rate 15,49 School Tax Rate 18,19
Figure 1 Before	Figure 2 After

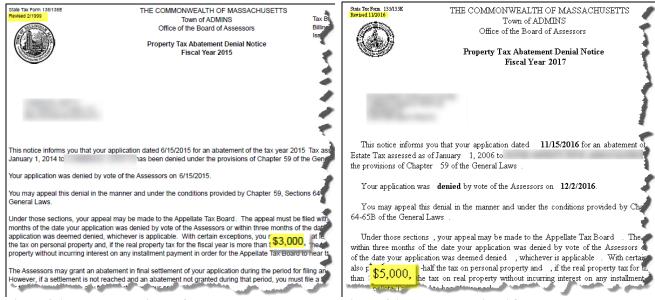
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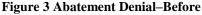
### 2. MASSACHUSETTS DIVISION OF LOCAL SERVICES BULLETIN 2016-06B

The state of Massachusetts issued Bulletin 2016-06b, <u>Revised Abatement, Exemption and Deferral Forms and</u> <u>Taxpayer Fact Sheets</u> effective November 7, 2016. Changes were incorporated into the forms in November and are mentioned here to reflect the change. The link for the bulletin is <u>http://www.mass.gov/dor/docs/dls/publ/bull/2016/2016-06b.pdf</u>.

The changes are illustrated in the figures below.

### 2.1. Abatement (and Denial of Abatement) Certificate Changes [Fix]





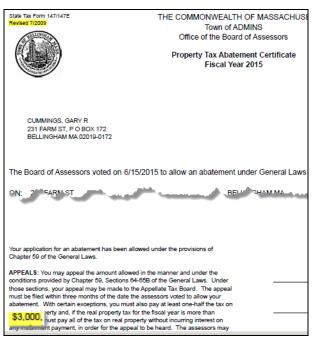


Figure 5 Abatement Certificate–Before

Figure 4 Abatement Denial–After

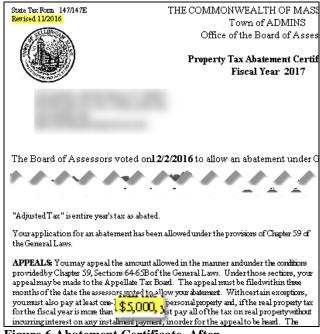
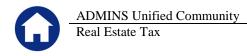


Figure 6 Abatement Certificate–After

## 2.2. Deferrals [Fix]

In addition to the dollar amount changing from \$3000 to \$5000, the state form revision date was added in the upper left corner and the date field for the form was expanded to prevent truncation.

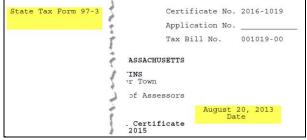


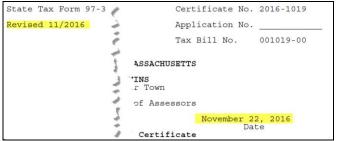
**APPEALS:** You may appeal the amount allowed in the manner and under the conditions provided by Chapter 59, Section 64-65B of the General Laws. Under those sections, your appeal may be made to the Appelate Tax Board. The appeal must be filed within three months of the date the assessor's voted to allow your deferral. With certain exceptions, if the real property tax for the fiscal year is more than \$3000, you must pay all of the tax without incurring interest on any installment payment in order for the appeals to be heard. The assessor's may grant a further dferral in final settlement fo your application during the period for filing an appeal. However, if a settlement is not reached and a deferral not granted during that period, you must have filed a timely appeal for the assessor's to be able to take any further action on your application.

#### Figure 7 Before - Deferral

APPEALS: You may appeal the amount allowed in the manner and under the conditions provided by Chapter 59, Section 64-65B of the General Laws. Under those sections, your appeal may be made to the Appelate Tax Board. The appeal must be filed within three months of the date the assessor's voted to allow your deferral. With certain exceptions, if the real property tax for the fiscal year is more than \$5000, you must pay all of the tax without incurring interest on any installment payment in order for the appeals to be heard. The assessor's may grant a further dferral in final settlement fo your application during the period for filing an appeal. However, if a settlement is not reached and a deferral not granted during that period, you must have filed a timely appeal for the assessor's to be able to take any further action on your application.











[TOC-SUP-SAPLAUC-2642]

### **3. HELP REFERENCE LIBRARY**

Effective with this software update, there are some enhancements to the structure of the Help Reference Library.

#### 3.1. Numbering Added to Help Reference Libraries [New]

A numbering scheme was added to all Help Reference libraries to make documents easier to find when support staff refers a user to a help document. Figure 11 shows a sample of the new numbering scheme. For example, a user may need the steps required to set the owner of record as of January 1 prior to running the billing. Support staff will refer the user to the help document **RE-270 Set Owner of Record January 1**, and the document is found in numerical order in the Help Reference Library.

[ADM-AUC-DOC-111]

Property Tax Help Reference Library										
<u>G</u> oto				liorary						
Actions	Referen	ce Card			Last Run Time					
ACIIOTIS	RE-100	Property Tax Help Documents Index	View	Email	11-Dec-2016 13:05:13.03					
	1	MAINTENANCE								
	RE-110	Splits & Combinations	View	Email	14-Oct-2016 17:09:37.62					
		BILLING								
Help Categories	RE-210	Q1 Real Estate Billing	View	Email	02-Jul-2015 12:37:27.65					
<u>1</u> Ledgers	RE-220	Q2 Real Estate Billing	View	Email	14-Oct-2016 17:09:51.56					
2 Purchasing	RE-230	Q3 Real Estate Billing	View	Email	14-Oct-2016 17:09:56.39					
<u>3</u> Accounts Payable		Q4 Real Estate Billing	View	Email						
<u>4</u> Human Resources	RE-250	Q3 Personal Property Billing	View	Email	01-Dec-2016 16:59:00.36					
5 Budget	E-970	Set Owner of Record as of Jan 1	View	Email	14-Oct-2016 17:10:06.10					
			View	Email	14-Oct-2016 17:10:15.91					
7 Property Tax		Upload Sales History	View	Email	14-Oct-2016 17:10:20.45					
8 Motor Excise	RE-290	Upload Billing Extract	View	Email	14-Oct-2016 17:10:24.38					
<u>9</u> Misc Billing		Upload Liens	View	Email	14-Oct-2016 17:10:27.69					
<u>0</u> System		Omitted - Supplemental - Revised	View	Email	14-Oct-2016 17:10:31.10					
D Product Demos		Personal Property Revised/Omitted	View	Email	14-Oct-2016 17:10:47.44					
Release Notes	RE-330	Estimated Bill - How to Adjust after Issuance?	View	Email	18-Oct-2016 09:59:06.69					
Ledgers	RE-340	Preliminary Bill - How to Adjust during Tax Roll?	View	Email	18-Oct-2016 09:40:47.46					
Purchasing	RE-350	Q1 Tax Balancing Template	View	Email	14-Oct-2016 17:18:25.76					
Accounts Payable	RE-360	Q1 Balancing Instructions	View	Email	14-Oct-2016 17:18:41.66					
Human Resources		Q2 Balancing Template	View	Email	14-Oct-2016 17:18:46.78					
Budget		Q2 Balancing Instructions	View	Email	14-Oct-2016 17:18:57.60					
Collections		Q3 Balancing Template	View	Email	14-Oct-2016 17:19:12.22					
Property Tax		Q3 Balancing Instructions	View	Email	14-Oct-2016 17:19:23.60					
Misc Billing		BETTERMENTS								
System		Betterment Accounting	View	Email	14-Oct-2016 17:19:38.63					
Other		Betterments - Setup New Project	View	Email	14-Oct-2016 17:19:43.10					
		Betterment Payoff	View	Email	14-Oct-2016 17:19:51.45					
		Betterments - Suspend/Apportion	View	Email	18-Oct-2016 10:01:20.06					
		Recognize Future Betterments in Curent FY	View	Email	21-Jan-2014 12:09:18.45					
		DEDUCTIONS	View	Email						

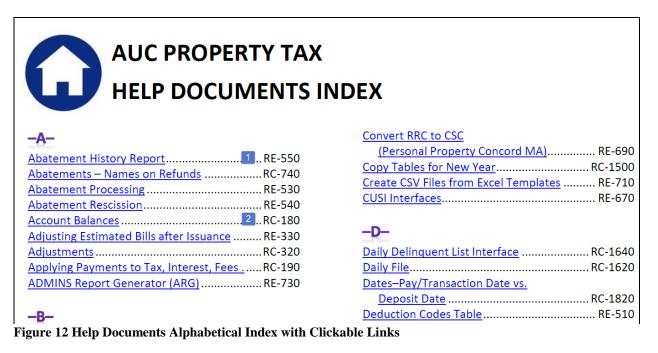
Figure 11 New Numbering System for the Help Reference Library

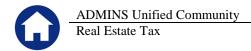
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### 3.1. Alphabetical Index for Help Documents [New]

An alphabetical index with hyperlinks is found at the top of each help Reference Library. Click **[View]** to access the index of help topics in alphabetical order, with links that open each help document.





Some sites may not permit users to open a linked document. For those sites, the index is numbered to allow you to rapidly retrieve the help you need. The initials correspond to the Library, so in the example shown, **RE** is the **Property Tax Help Reference Library**, and **RC** is the **Revenue/Collections Help Reference Library**. If the reference is to a Release Note, the **Month** and **Year** of the release note will be referenced.

- <b>C</b> -	
Controlling Access to the Budget	<mark>BU-13</mark> 0
Cost Breakdown Reports	DEC-2016 <sup>1</sup>
Create CSV Files from Excel Templates	BU-310

<sup>1</sup> Refers to a Release Note, for the cited month and year – in this case, Budget Release Notes for December of 2016.

Each user may have a unique perspective on how to search for help on a given topic; as such, submit suggestions for additional entries or terminology to <a href="mailto:support@admins.com">support@admins.com</a> so that ADMINS may build these links into upcoming software releases.

[ADM-AUC-DOC-111]

### **3.2.** New or Updated Documentation

The following new or updated documentation was added to the Help Reference Library.

• RE-100 Property Tax Help Documents Index [New]