TAX – REAL ESTATE

RELEASE NOTES – JUNE 2014

This document explains new product enhancements added to the ADMINS Unified Community for Windows **Tax** system. The ADMINS Support staff installed these changes to your system on **June 21, 2014**.

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1.   TAX ROLL

1.1.   Change Bill# of Added/Omitted/Supplemental Bills

During the commitment process an AOS Bill is assigned a unique Bill# to insure they are readily identified. However, when a subsequent billing cycle occurs, those parcels are then assigned a "normal" bill# in line with all other bills loaded from the billing extract.

In other words, once an AOS bill has been added to the general tax roll of the City/Town, it is no longer considered a separate and distinct AOS bill.

Prior to this software update, an AOS bill assigned a unique bill# would retain that unique number making it appear as an AOS bill in subsequent years. This has been corrected.
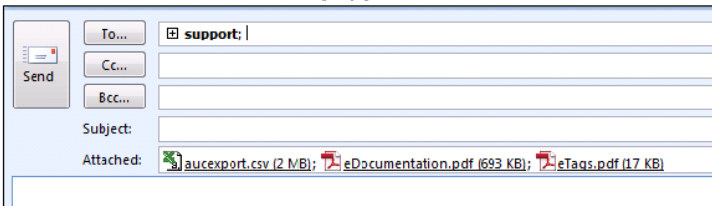
[ADM-AUC-RE-5448]

1.2.   CASS Processing
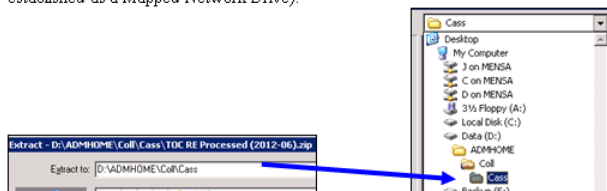
1.2.1.   Upload CASS Files

Modified the **Upload CASS Files** process to move the uploaded file from the import location and move it to the archive location (as specified in Module Control #4953 and #4954 – see below). This will prevent the user from loading an older file into the current billing cycle.

Excerpt from Q# Billing Help Reference document.

The billing document explains where the "input" file must be stored in order for the Upload CASS Files step to function properly.

This software update modified the process shown below to locate, process and archive the CASS zip code database accordingly for this billing cycle:

| ModCtrl#	Description	Example
#4953	This is the folder location identifying where the "Input" or "Import" files are currently located.	Path: File:
#4954	This is the folder location identifying where the file that was just processed should be archived to.	Path: File:

[ADM-AUC-RE-8233]

1.3.   Billing Setup Table (Applies to RE & PP)

1.3.1.   Cannot Change Bill Date after process Started

Modified the Tax Roll process for both RE and PP to alert users if they have generated billing files but subsequently change the BILL DATE in the Billing Setup table. The billing files are generated using the Bill Date in the table at the time the records are created. You may not change the Bill Date after the fact without
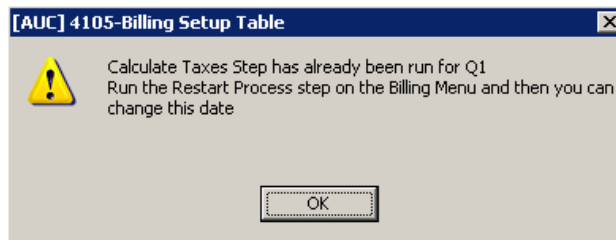
implications. If you need to change the Bill Date then you must Restart the process and build the tax roll with a new BILL DATE.
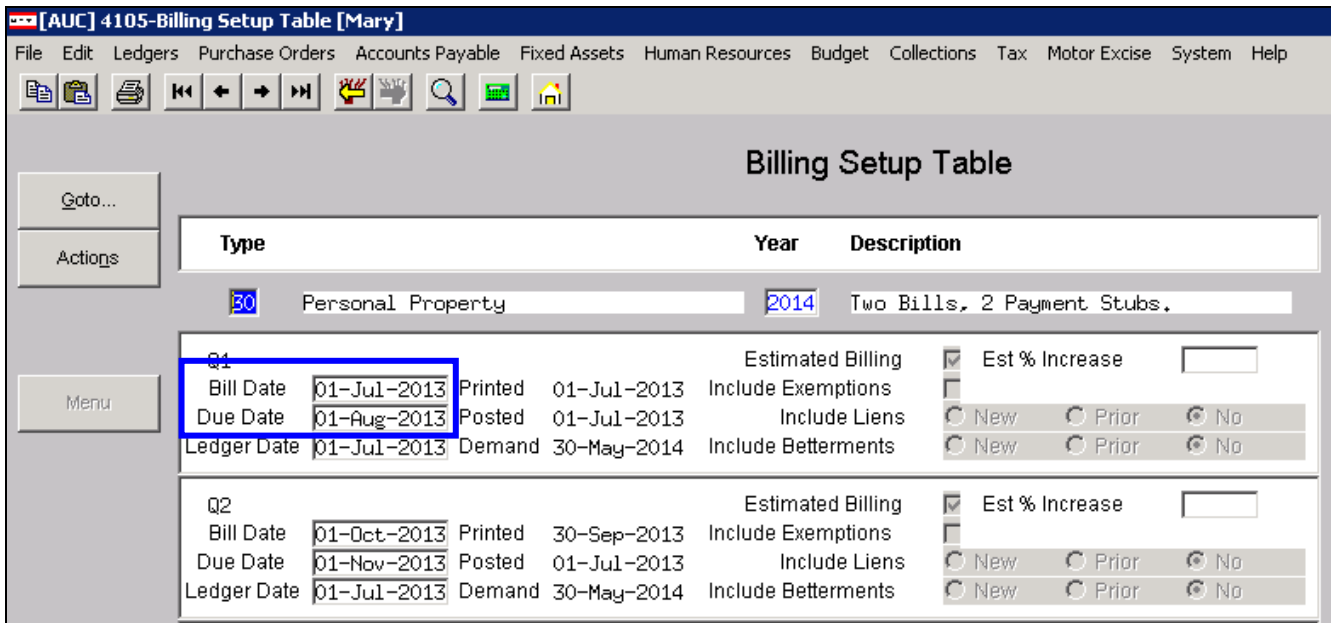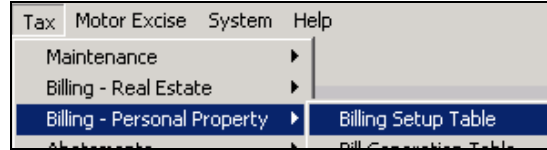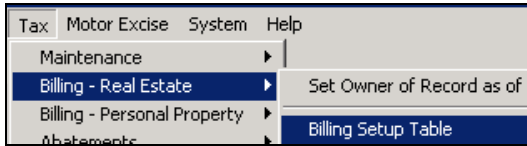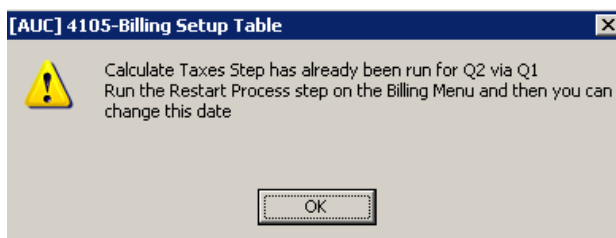

1.1.1.1. BILL DATE

If the Bill Date is changed after the **CALCULATE TAXES** step is run, then this message will be displayed.

If you are processing **Q1 or Q3** bills then you will see this message:

If you are processing **Q2 or Q4** bills (where the Calculate Taxes step does not apply) then you will see this message:
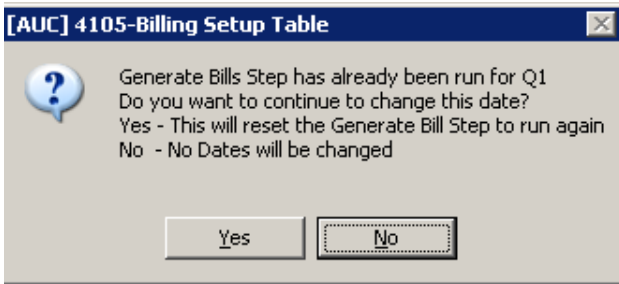
1.1.1.2. DUE DATE

If you have run the **GENERATE BILLS** step and then you decide to change the **DUE DATE**, the following message will be displayed.

If you are processing **Q1 or Q3** bills then you will see this message:

If **NO** is clicked, then the date will revert back to the prior date and no changes will be applied.

If **YES** is clicked, the Generate Bills step (and any steps after that) will have the Date/Start/End and Success flag cleared out allowing you to re-run those steps.

If you are processing **Q2 or Q4** bills and the Due Date is changed then you will see the following message:
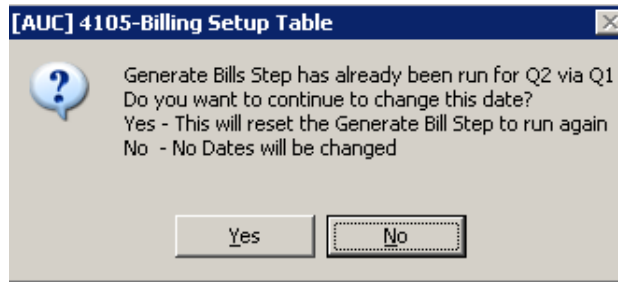
As with the Bill Date change, you can only change the due date field for Q2/Q4 during the Q1/Q3 processing.

[ADM-AUC-PP-3831]

2. REPORTS

2.1. Liens to Be Included in Billing Report

A change was made to this report to show any liens in the entry file that have not been submitted for billing. There are now three sections for liens – one for "Not Submitted for Billing", a second for "Submitted for Billing" and a third "Collected for Billing". This report is printed as part of the billing steps menu or may be printed by selecting **Tax ▶ Liens ▶ Liens to be Included in Billing**.

Figure 1 Before

Figure 2 After

[ADM-AUC-RE-5451]

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2.2. Commitment Register

Modified the commitment register to include all bills on the tax roll. Prior to this software update, any bills that had credits on a previous quarter where those credits were applied to the current billing resulting in a $0 bill would cause those bills to be excluded from the commitment register. This has been corrected.

[ADM-AUC-RE-5447]

2.3. Tax Bills

The bill backers for sites that print original bills in house were updated to display FY 2015 dates.

[ADM-AUC-CRYSTAL-87]

3.   SET OWNER OF RECORD AS OF JAN 1

Modified the process called "Set Owner of Record as of Jan 1" to set the "Last Changed Date" even if there is no change in ownership. This alerts the system that the ownership record was looked at and processed as of Jan 1st.

Prior to this update, if there was no change in ownership then the record was left with the prior year's date of last change. This has been corrected. If a parcel has an ownership change or not, it will be updated to reflect that the entire parcel file was processed in preparation for billing.

[ADM-AUC-RE-5446]

4.   INTERFACES–UPLOADING LIENS

4.1. CUSI

The CUSI lien upload file differs from the standard template upload liens file format. ADMINS added a question to the prompt asking if the file being uploaded is from CUSI.
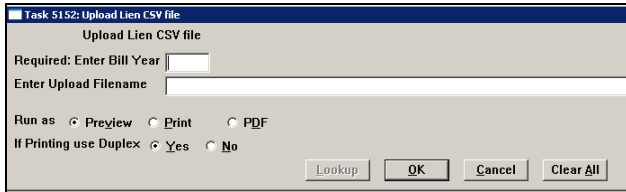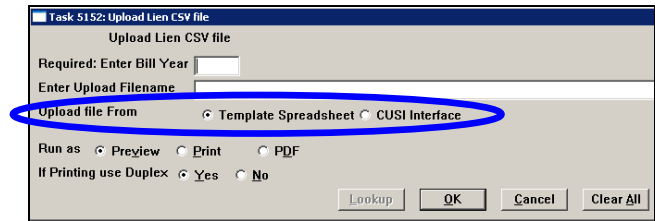

Figure 3 Before   **Figure 4 After**

[ADM-AUC-RE-5449]

5.   BETTERMENTS

5.1. Add Project

5.1.1. Set Interest Date

When adding a new project the interest date should be set to the Invoice Date + 30 days. This has been corrected.

[ADM-AUC-RE-5446]