



TAX – REAL ESTATE

RELEASE NOTES – MARCH 2015

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

TABLE OF CONTENTS

1. BILLING	2
1.1. Quarter 3 and Quarter 4 Bills & Reprints	2
1.1.1. Abatement Dates	2
2. BETTERMENTS	3
2.1. Copy Betterment Accounting Rules	3
3. ABATEMENTS	4
4. HELP REFERENCE LIBRARY	4
4.1. New or Updated Documentation.....	4



1. BILLING

1.1. Quarter 3 and Quarter 4 Bills & Reprints

1.1.1. Abatement Dates

The Quarter 3 and Quarter 4 bills and reprints were misprinting the abatement application deadline. The abatement message now cites the Quarter 3 Due Date as the abatement application deadline. Prior to the update, the date used was hardcoded as February 1 and required ADMINS intervention each year if the due date changed.

The Quarter Three due date is set in the Billing Setup table. Access the table via **Tax ▶ Billing–Real Estate ▶ Billing Setup Table**.

The screenshot shows a navigation menu on the left with 'Tax' selected, leading to 'Billing - Real Estate' and then 'Billing Setup Table'. The main window displays the 'Billing Setup Table' with columns for Type, Year, and Description. The table lists quarterly billing information for Real Estate in 2015. A blue arrow points to the 'Due Date' for Q3, which is '01-Jan-2015', circled in blue. Other dates shown include 01-Jul-2014, 01-Aug-2014, 01-Jul-2014, 01-Oct-2014, 03-Nov-2014, 01-Jul-2014, 01-Jan-2015, 02-Feb-2015, 01-Jan-2015, 01-Apr-2015, 23-Feb-2015, 01-May-2015, and 30-Jan-2015.

Type	Year	Description
10 Real Estate	2015	Two Bills, 2 Pa
Q1		Estimated Billing
Bill Date	01-Jul-2014	Printed 30-Jun-2014
Due Date	01-Aug-2014	Posted 30-Jun-2014
Ledger Date	01-Jul-2014	Demand
		Include Exemptions
		Include Liens
		Include Betterments
Q2		Estimated Billing
Bill Date	01-Oct-2014	Printed 28-Jul-2014
Due Date	03-Nov-2014	Posted 30-Jun-2014
Ledger Date	01-Jul-2014	Demand
		Include Exemptions
		Include Liens
		Include Betterments
Q3		Estimated Billing
Bill Date	01-Jan-2015	Printed 30-Jan-2015
Due Date	01-Jan-2015	Posted 30-Jan-2015
Ledger Date	01-Jan-2015	Demand
		Include Exemptions
		Include Liens
		Include Betterments
Q4		Estimated Billing
Bill Date	01-Apr-2015	Printed 23-Feb-2015
Due Date	01-May-2015	Posted 30-Jan-2015
Ledger Date	01-Apr-2015	Demand
		Include Exemptions
		Include Liens
		Include Betterments



This applies only to bill reprints and sites printing original bills in house.

Abatement applications must be filed with the Assessors by **2/1/2015**. For

Figure 1 Before

Abatement applications must be filed with the Assessors by **2/2/2015**. For

Figure 2 After

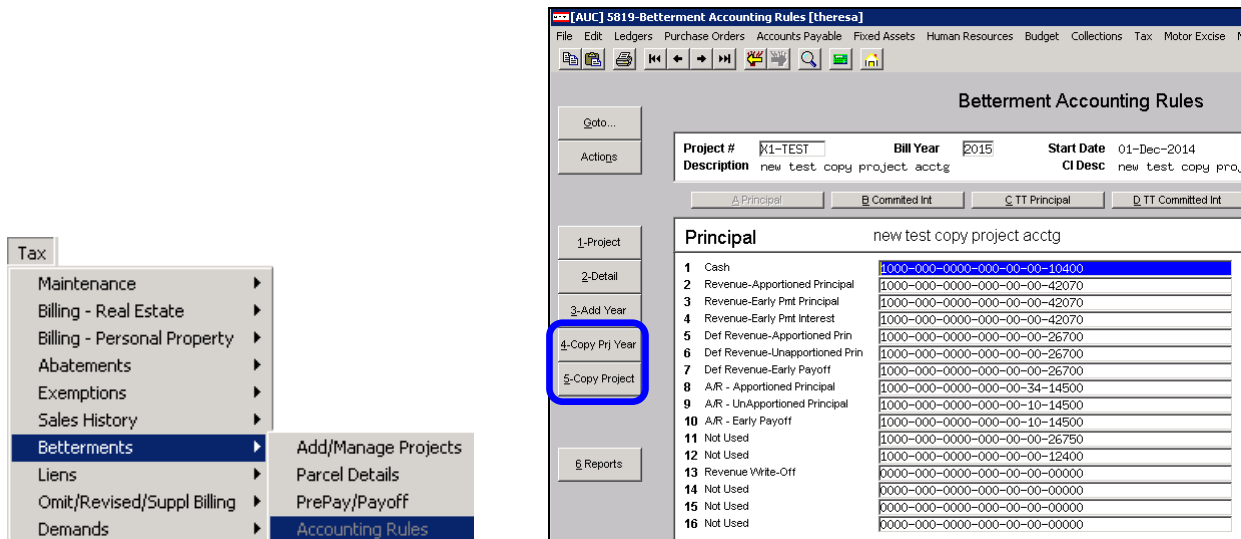
[ADM-AUC-CRYSTAL-95]



2. BETTERMENTS

2.1. Copy Betterment Accounting Rules

Copying the accounting rules from an existing project to a new project has been improved. Begin by first creating a new project. Once the new project is created, select **Tax > Betterments > Accounting Rules**.



The first button, **4-Copy Prj Year** will copy a single year from one project to a year in another or the same project.

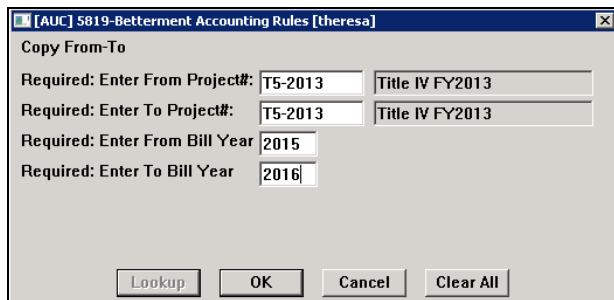


Figure 3 Copying a year within the same project

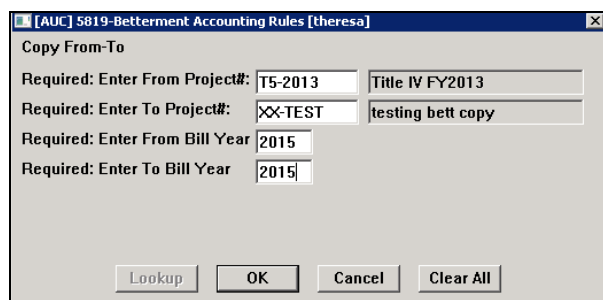


Figure 4 Copying a year from one project to another

The second button, **5-Copy Project** will copy all years from one project to another project. In the event that the projects have differing start years and/or terms, an informative message box will appear with the details of the differences. In the example below, the accounting rules from Project #2082 are being copied to Project #X2-TEST. Since the two projects have different start years and terms, the message below is displayed.

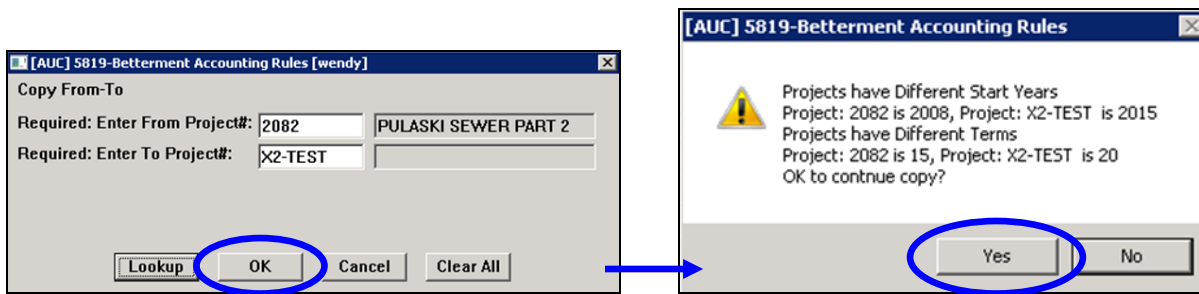


Figure 5 Copy Project

Click on the button to continue. The system will create the accounting rules for the new project, beginning with the TO projects starting year (2015), through the number of years defined in the FROM project (15 year term). So in the above example, Project#X2-TEST will have accounting rules created for years 2015 through 2029. The accounting rules for subsequent years may then be added using the button.



Note: By default, blank accounting rule tables are created for 20 years when establishing a new project. Unneeded years may be left blank and will not affect processing.

[ADM-AUC-RE-5427]

3. ABATEMENTS

Some abatements could not be issued for the total tax amount when use codes changed since the preliminary bill was issued, as use codes' tax rates may vary. This caused the process to attempt to create an abatement with a negative total tax amount.

Since the software update, when this occurs, the abatement process recalculates the tax amount based on the net value of the parcel using the tax rate table and allows the abatement based on the new tax amount. This affects both tax and CPA values where the municipality participates in the CPA program.

[ADM-AUC-RE-5478]

4. HELP REFERENCE LIBRARY

4.1. New or Updated Documentation

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

- SYSTEM System Administration Kit