



REAL ESTATE TAX BILLING

RELEASE NOTES DECEMBER 2020

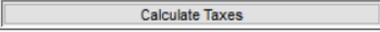
This document explains new product enhancements added to the **ADMINS Unified Community (AUC) REAL ESTATE TAX** system.

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1. TAX CALCULATION & NEW BETTERMENTS [Enhancement]

To avoid the unintended consequences of running a billing without first suspending and apportioning new betterments, **ADMINS** changed the **Real Estate** tax calculation  process. A set of error checks will run at the very start of the  process only if **New, Current Betterments** are to be added to the taxes during the billing. The error checks are as follows:

1. Is the process being run for **Real Estate**?
(there are other bill types, such as sewer or tangible property, that use the same calculation process)

- a. If it is **Real Estate**, then the process goes to item #2
- b. If it is **not Real Estate** then steps 2 through 4 are skipped, and process runs as normal

2. Are betterments checked as "**Ready for Tax Calculation**



- a. If "Betterments Ready for Tax Calculation" is checked then the process goes to item #3.
- b. If not, then the remaining checks are skipped, and process runs as normal.

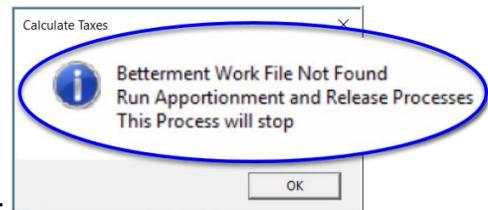
3. Is the "**Include Betterments**" radio button set for **New** on the **Billing Setup Table**?



- a. if **New** is selected the process goes to item #4.
- b. If **New** is not selected, the process skips the last check and continues as normal.

4. Has the **Suspend and Apportion Betterments** process been run and is the **Release Apportionments for Billing** step complete? (This step checks for the presence of a **Betterment Work File**).

- a. If complete, no further checking is done the process simply continues as normal.



- b. If not complete, the system displays this message:

- c. Go to:

Tax ▶ Betterments ▶ Suspend and Apportion Betterments



[AUC] 5825-Tax Billing: Suspend and Apportion [theresa]

Tax Billing: Suspend and Apportion

Goto...	Description	Date	Start	End	Success
	Betterment Suspension Update	27-Apr-2020	16:44:31,15	16:44:31,15	<input checked="" type="checkbox"/>
Actions	Apportion Betterments for Billing	27-Apr-2020	16:45:12,50	16:45:15,64	<input type="checkbox"/>
	Release Apportionments for Billing				<input type="checkbox"/>

Run the **Apportion Betterments for Billing** [Apportion Betterments for Billing] step. Then run the **Release Apportionments for Billing** [Release Apportionments for Billing] step.

The **Betterment Work File** will now exist and the **Calculate Taxes** step can be run again. See also the RE-490 Betterments Suspend/Apportion document in the Help Reference Library.

[TOC-SUP-SAPLAUC-2985]

2. #4104 REAL ESTATE BILLS–AS OF A DATE–BY PARCEL TYPE [Enhancement]

The report provides **2** subtotals for type within each year; subtotals for each year and provides a **3** grand total for all years. To run the report, go to:

Collections ▶ Reports ▶ Report Library ▶ Collections Reports ▶ #4104 Real Estate Bills – As of a Date – By Parcel Type

Report Library Collections

Report Name	View	Report
4702-Bill Type - As of a Date	Sample	Run
4104-Real Estate Bills - As of a Date - By Parcel Type		
4705-Balances as of Annual Balance	Sample	Run
4706-Monthly Balances as of (Trial		
4648-Projected Balances as of		
4614-Parcel Outstanding Balance		
4708-Aged Receivables Report		
4616-Outstanding Balance by Parcel		

Task 4104: Real Estate Bills - As of a Date - By Parcel Type

Real Estate Bills - As of a Date - By Parcel Type

Required: Enter Bill Year Range From Year: To Year:

Required: As of Date (mmddyyyy)

Run as Preview Print PDF Excel

If Printing use Duplex Yes No

Enter the required **Bill Year Range** – if a single year is to be reported on, enter the same year in both the “**From Year:**” and “**To Year:**” fields. Enter the required **As of Date** or select it from the drop-down calendar using the **[Lookup]** button. The report columns are described below:



2.1. Column Descriptions

Column	Description
A Year	The year of the bill – the data will be sorted by bill year.
B Parcel Type	<p>The type of parcel as listed in the Tax>Tables>Parcel Class Table. The class numbers and descriptions shown here are for Massachusetts; check the table to see the description of the parcel class.</p> <p>A subtotal for each class is printed on the report. 2 A subtotal for each year is printed on the report.</p>
C Category	The tax category number and description of the tax
D Charges	The dollar amount charged for the parcel class
E Adjustments	The dollar amount of adjustments for the parcel class
F Refunds	The dollar amount of refunds for the parcel class
G Abatements	The dollar amount of abatements for the parcel class
H Deductions	The dollar amount of deductions for the parcel class
I Payments	The dollar amount of payments for the parcel class
J Balance	The balance for the parcel class – this is also a grand total for all parcel classes

Class	Description
0	Mixed-Use
1	Residential
2	Open Space
3	Commercial
4	Industrial
5	Personal Property
6	Forestry
7	Agricultural
8	Chapter Land
9	Exempt

2.2. Excel® Format

As of 09-Dec-2020

Year	Parcel Type	Category	Charges	Adjustments	Refunds	Abatements	Deductions	Payments	Balance
2019	7	01 Tax	506.59					506.59	
2019	7	40 Tax Interest	0.02					0.02	
2019	7	Agricultural	506.61					506.61	
2019	8	01 Tax	2,215.37					2,215.37	
2019	8	40 Tax Interest	34.21					34.21	
2019	8	Chapter Land	2,249.58					2,249.58	
2019			36,144,342.64	(155,716.59)	55,642.68	24,407.42	324,907.89	35,522,296.44	172,656.98
2020	9	01 Tax			548.74			1,164.05	-615.31
2020	9	05 Water Lien	271.82						271.82
2020	9	06 Water Ln Cl	153.49						153.49
2020	9	09 Trash Lien	570.00						570.00
2020	9	40 Tax Interest	161.94					161.94	
2020	9	Exempt	1,157.25		548.74			1,325.99	380.00
2020			37,857,126.29		78,637.59	26,568.19	333,478.95	36,951,199.50	724,517.24
		*** Grand Total ***	139,846,372.33	-714,461.34	288,249.77	186,901.78	1,245,046.57	137,087,469.48	900,742.93

Figure 1 Report 4104 “Run as” © Excel®



2.3. Print/Preview/PDF® Format

Year	Category	Charges	Adjustments	Refunds	Abatements	Deductions	Payments	Balance
2020 1	01 Tax	27706729.58		63441.00	3981.63	280440.50	26989408.25	496340.20
2020 1	03 Revised Tax	169.22					169.22	
2020 1	05 Water Lien	258047.92		253.85			228902.03	30196.94
2020 1	06 Water Ln CI	32954.20		3.85			29054.95	3903.10
2020 1	07 Sewer Lien	109562.22		234.62			93973.91	15823.03
2020 1	08 Sewer Ln CI	15205.25					12908.86	2296.39
2020 1	09 Trash Lien	159486.24					148306.33	11179.91
2020 1	15 Sewer Bett	8233.31					8233.31	
2020 1	16 Sewer Bett CI	1605.50					1605.50	
2020 1	17 Title 5 Bett	59641.99					58988.05	653.94
2020 1	18 Title 5 Bett CI	18006.48					17579.88	426.60
2020 1	19 Title 5 Bett	5685.25					5461.25	224.00
2020 1	20 Title 5 Bett CI	1705.58					1638.38	67.20
2020 1	33 Demand	2360.00					850.00	1510.00
2020 1	40 Tax Interest	47426.07					45904.18	1521.89
2020 1	80 Insufficient Funds	225.00					200.00	25.00
2020 1	Residential	28427843.81		63933.32	3981.63	280440.50	27643184.80	564170.20
2020 9	Exempt	1157.25		548.74			1325.99	380.00
2020		37857126.29		78637.59	26568.19	333478.95	36851199.50	724517.24
*** Grand Total ***		37857126.29		78637.59	26568.19	333478.95	36851199.50	724517.24

Figure 2 Report 4104 “Run as”

[ADM-AUC-RC-8499]

3. EMAILING FROM AUC

ADMINS allows emailing a report or document to multiple addresses simultaneously. **Separate each email address with a comma**, as shown below. Currently, there is a maximum of eighty characters available in the email address field.

Do not use spaces between the email addresses.

Figure 3 Enter multiple email addresses, separated by a comma, with no spaces between the addresses

[ADM-AUC-SY-8164]



4. HELP REFERENCE LIBRARY

The following new or updated documents added to the Help Reference Library:

4.1. New or Updated Documents

- BETTERMENTS RE-490 Betterments Suspend/Apportion [Updated]
- SYSTEM SY-101 Quick Start Videos [Updated]