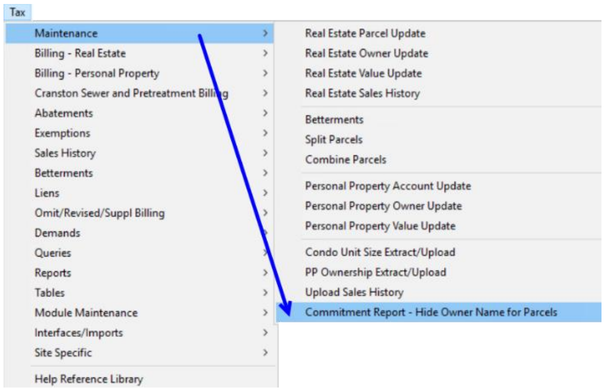
REAL ESTATE TAX BILLING

RELEASE NOTES JUNE 2021

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

CONTENTS

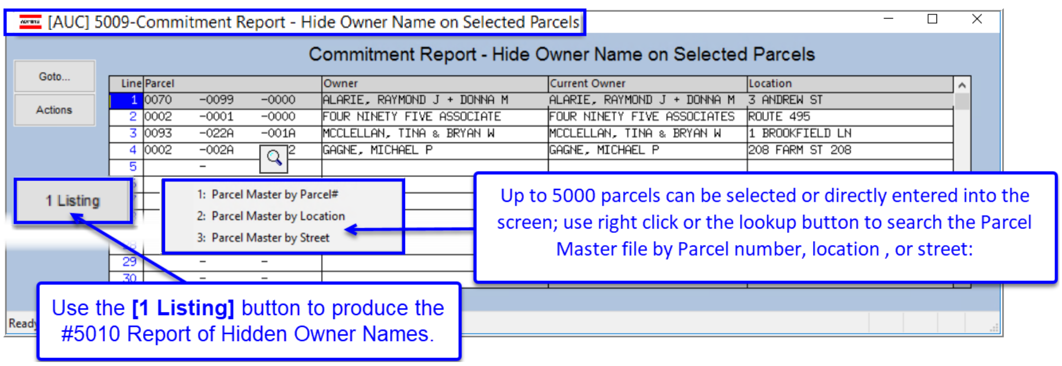
1. SUPPRESS OWNER NAME ON REAL ESTATE COMMITMENT



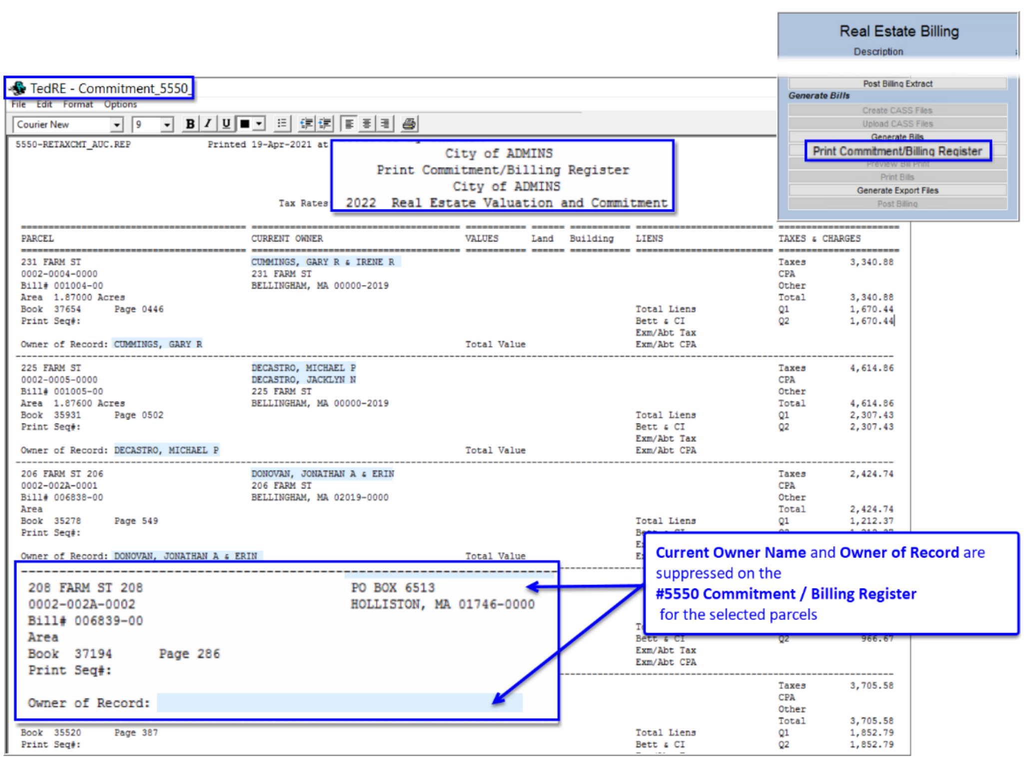
To protect public safety officials, municipalities compile a list of properties owned by public safety personnel and suppress the names from public databases. These suppressed names appear on the #5550 Commitment report produced as part of the billing process.

ADMINS added a process to suppress owner names from appearing on the commitment reports. To see the new process, go to:

Tax ▶ Maintenance ▶ Commitment Report Hide Owner Name for Parcels



Once all parcels have been selected on this screen, the owner names will be hidden when the #5550 commitment report is produced as part of the billing process.

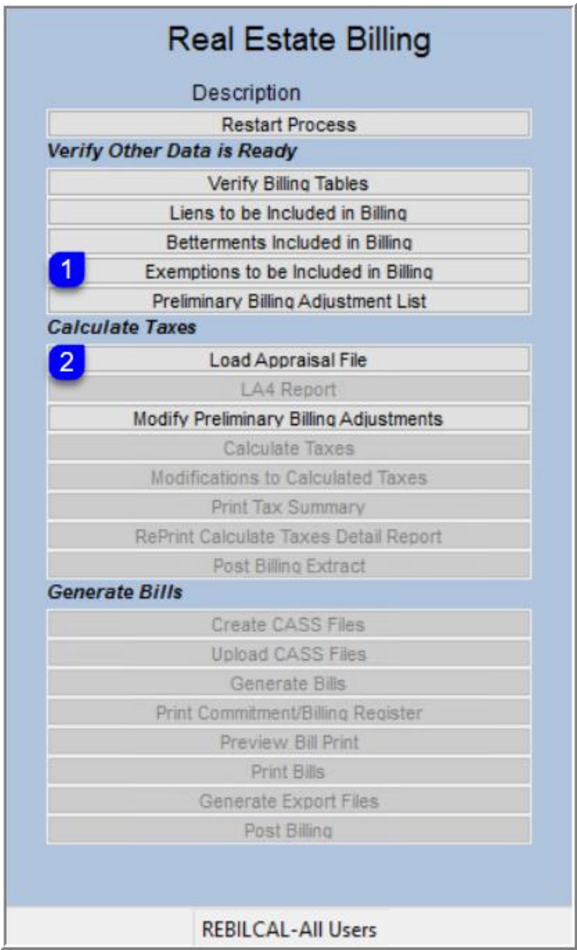


[BLG-SUP-SAPLAUC-1318]

2. BILLING

Parcels with statutory exemptions sometimes undergo a Land Use Code **(LUC)** change from the previous billing year. In that event, the **[Upload Appraisal File]** step in the billing will report that the parcel's **LUC** does not match the **LUC** in the upload file as shown in Figure 1 below.

2.1. Changing LUCs on Modify Exemptions Screen [Enhancement]



The **[Upload Appraisal File]** error report lists errors if:

- The **LUC** has changed (most likely)
- The parcel is no longer being billed (less likely but possible)

Prior to the software update, there was no method to update an exemption to a new code or add a new exemption for a **LUC** that did not exist in the *current* value file.

ADMINS added the option to change the **LUC** on an existing exemption to the new **LUC**.

- If the parcel is now exempt – remove the exemption from the pre-billing file using the existing **[1 Remove]** button.
- If the **LUC** changed, update the exemption to use the new LUC using the new **[2 Chg Use]** button.
- to add an exemption for a **LUC** that is not in the current year file, choose the current **LUC** and then click on **[2 Chg Use]** to change it to the new **LUC**

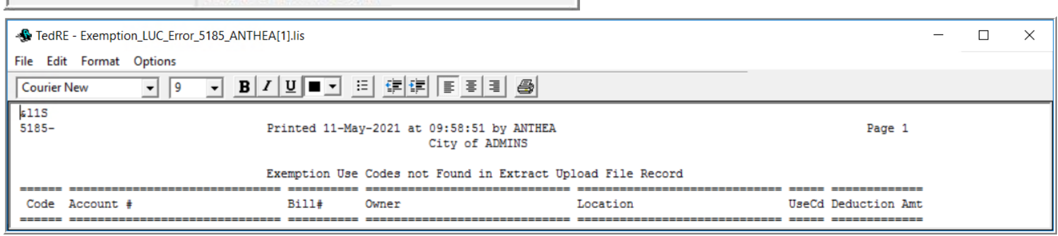
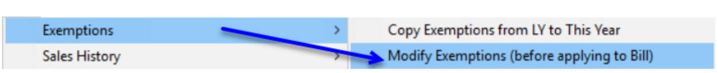


Figure 1 Report of Exemption Use Codes *Not* Found in the Extract Upload File

Run the exemption process prior to the billing either by copying the exemptions from last year or building a spreadsheet for uploading into the exemptions pre-billing file. Once the file is populated, make any changes by going to:

Tax ▶ Exemptions ▶ Modify Exemptions (before applying to Bill)



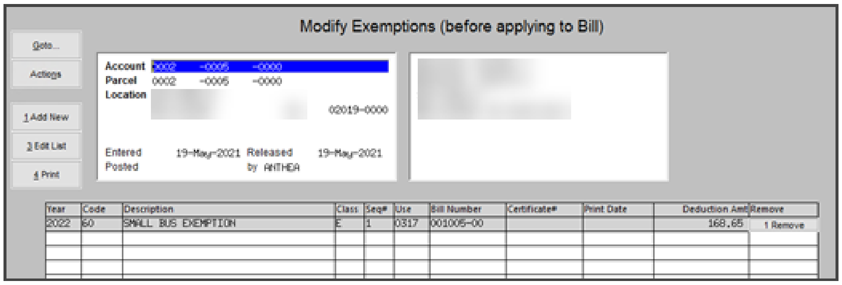


Figure 2 Before – There was only a [1 Remove] button on the screen

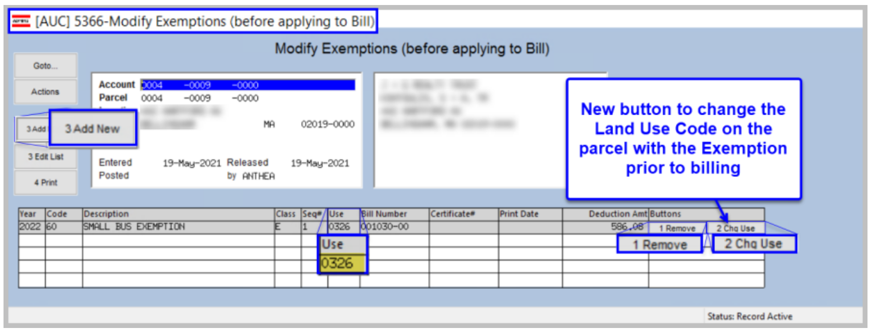
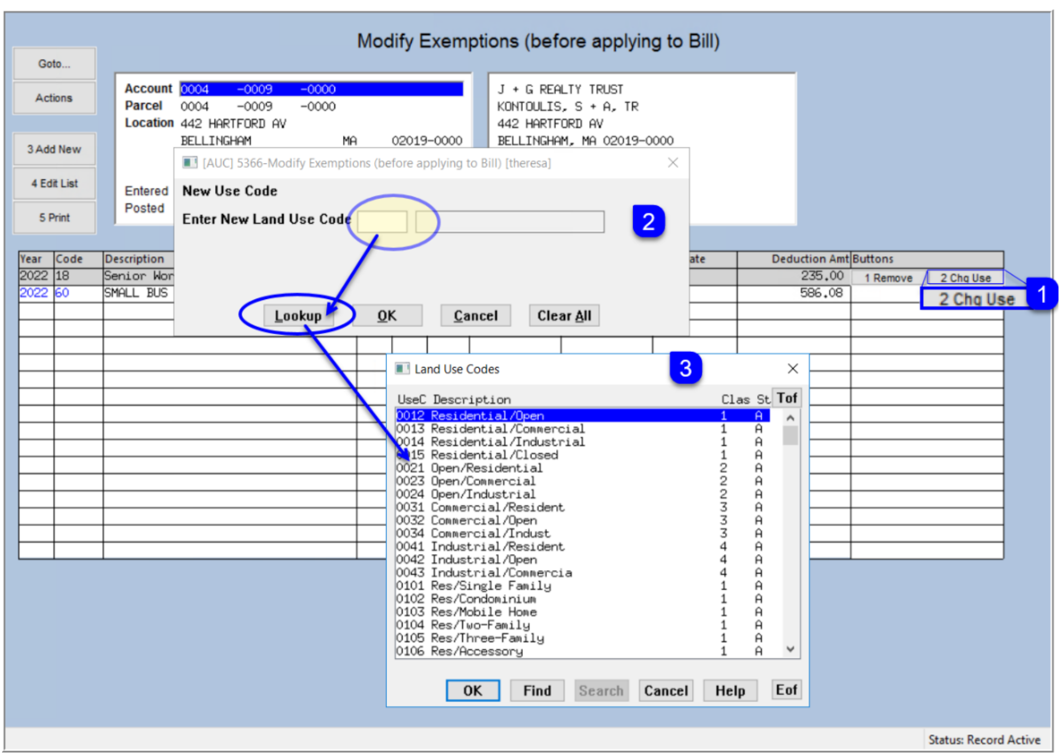


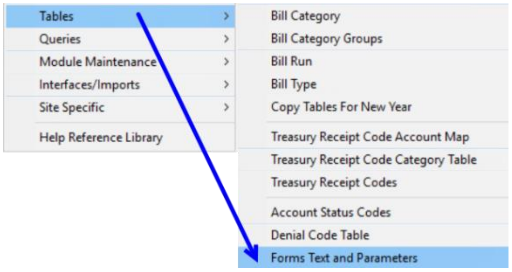
Figure 3 After – there is now a [2 Chg Use] button to change the LUC on the parcel

To change the existing **LUC** to a new **LUC**, click on the **[2 Chg Use]** button. Enter the new use code directly, or select it from the **[Lookup]**, and click **[OK].** The new **LUC** will be used for the exemption and will be available for a new exemption added to the parcel.



[ADM-AUC-RE-5616]

3. Forms Text and Parameters Table [Enhancement]



ADMINS changed the way that the **Forms Text and Parameters Table** works.

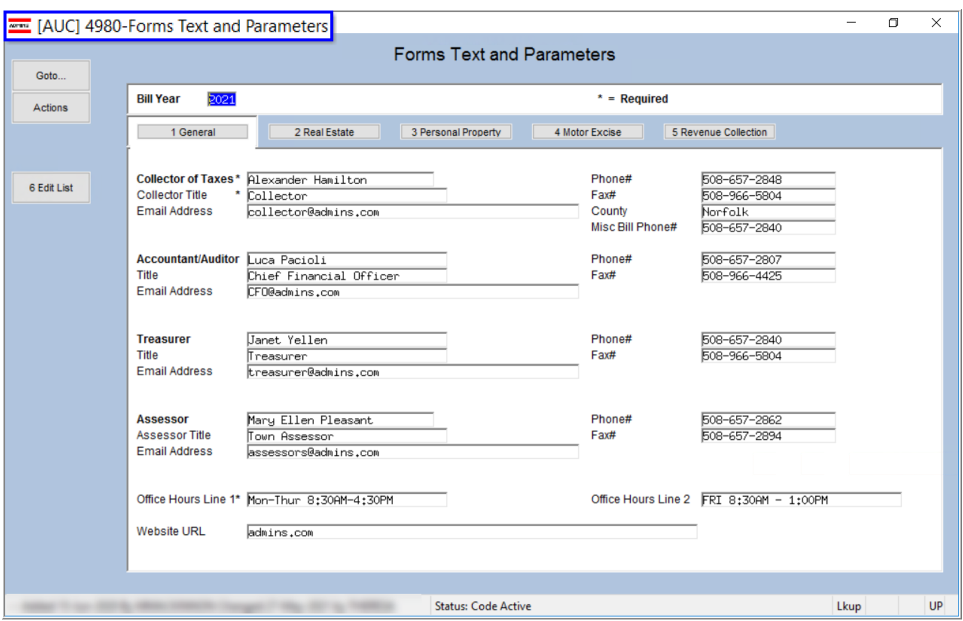
Previously, when making a change, the change had to be made multiple times because the table has a record for each bill year in the table. Now, if a change is made to a ***current year*** entry, for example, if there is a new phone number or a new Treasurer, all years will be updated with the new information.

In the image below, changes were made to the 2021 **General** Tab of the table. The system propagated the changes throughout all years, both past and future. (Future years may exist in the table if the Copy Tables and Parameters command was run to prepare for the coming fiscal year.) This ensures that the same information is printed on bills no matter what year the bill was issued.

If any year other than the current fiscal year as defined in module control #4009 is updated, the remaining years will not be updated. Only make global changes to the current fiscal year record.

Note: The changes made apply to ***each tab's*** data – so if changing the **[1 General]** tab, all years for the **[1 General]** tab will have the same data as the current year. If changes are made to the **[2 Real Estate]** tab, the changes are applied only to the remaining years in the **[2 Real Estate]** tab – each tab stands alone.

The table has five tabs – **[1 General], [2 Real Estate], [3 Personal Property], [4 Motor Excise]**, and **[5 Revenue Collections]**.



The values from the **[1 General]** and **[2 Real Estate]** tabs are used on Real Estate Bill (original and reprints), Demands, Warrants, and reports.

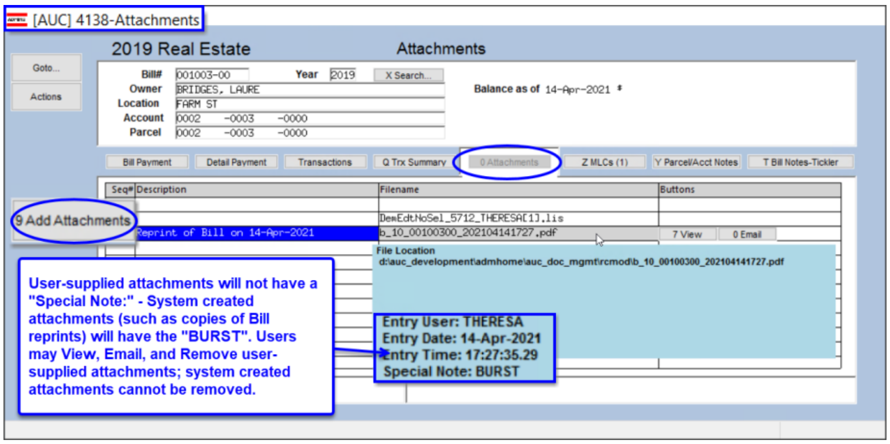
[ADM-AUC-RC-8498]

4. ATTACHMENTS HOVERTEXT [Enhancement]

ADMINS added more information to the hovertext on attachments indicating when the attachment was made and by whom. If the **"Special Note"** begins with **"BURST"**, it identifies a **System-Created** attachment, which cannot be removed by the user. Attachments without a **"Special Note"** are **user-supplied** and may be detached using the **[Remove]** button. To see this feature in the **Real Estate Tax Module**, go to the following screen.

4.1. #4138 – Real Estate Bill Attachments

Collections ▶ Queries ▶ Bill Payment ▶ [0 Attachments]



Copies of Real Estate original bills and reprints can be attached by the system depending on the value of module control #5103 for original bill printing, and module control #5105 for bill reprints. If module control is set to "Y", attach copies of original bills (5103) and copies of bill reprints (5105).

Figure 4 If module control 5103 / 5105 is set to "Y", system-supplied attachments will show on this screen

Use the **[9 Add Attachments]** buttons to add a user-supplied attachment in this screen.

4.2. #4321 – Billing History (Reports from Billing)

Tax ▶ Queries ▶ Billing History

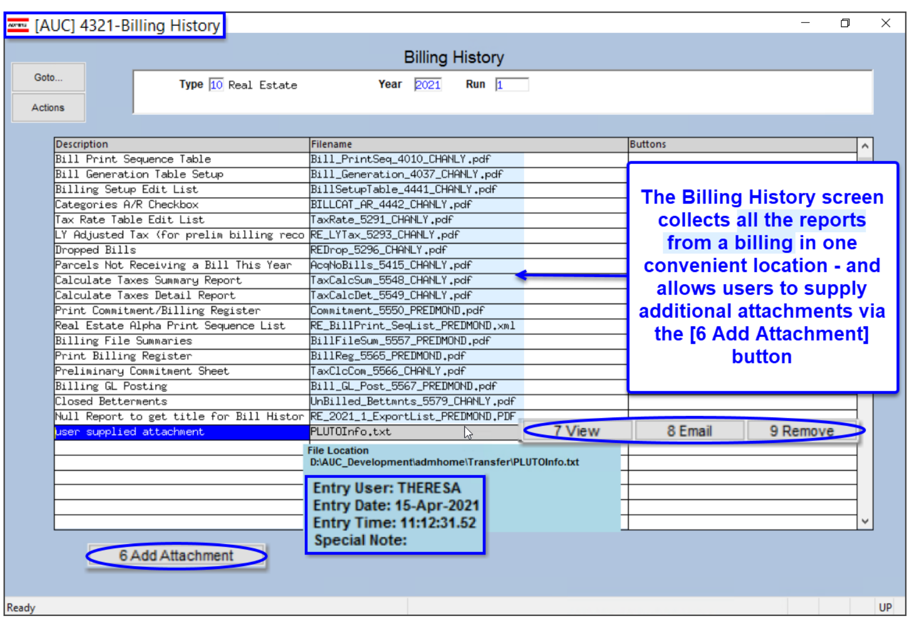


Figure 5 The Billing History screen is the access point for both system and user-supplied attachments

4.3. #5365 – Real Estate Deduction History Attach

Tax ▶ Abatements ▶ RE Deduction History ▶ [2 Attachments]

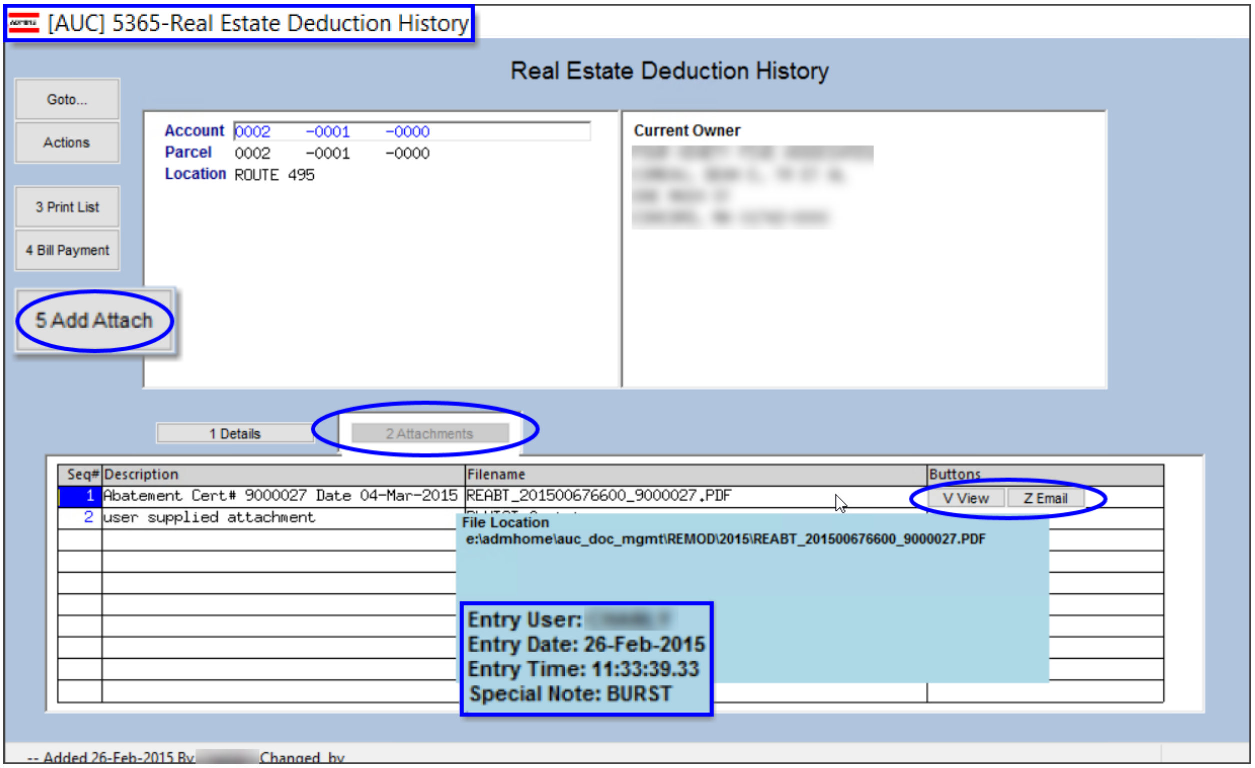


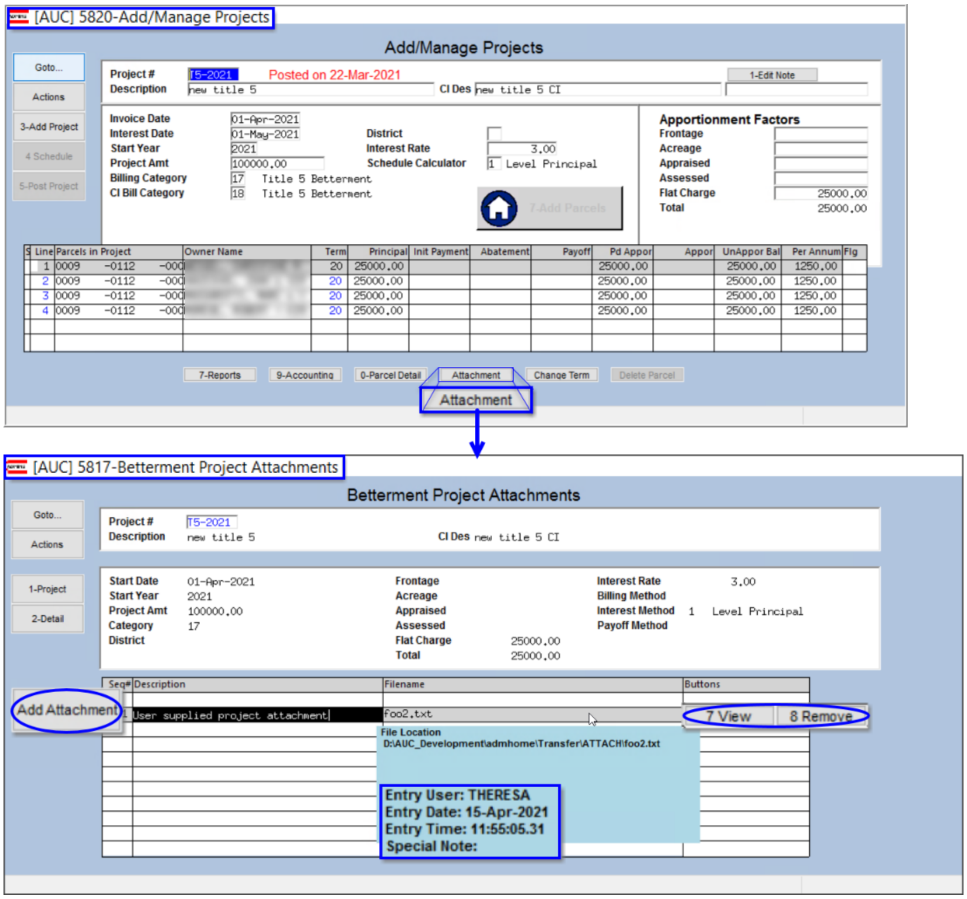
Figure 6 The Deduction History screen is the repository for both system and user-supplied attachments

4.4. Real Estate Betterments

Real Estate Betterments offers two different types of attachments – attachments to an entire project, and attachments to a specific parcel within the projects.

4.4.1. #5817 – Project Attach

Tax ▸ Betterments ▸ Add Manage Projects ▸ [Attachment]



Attachments that pertain to the entire betterment project can be attached in the Betterment Project Attachments screen.

Use the **[Add_Attachment]** button to select a file to be attached for the project.

The hovertext will show the entry user, entry date, entry time.

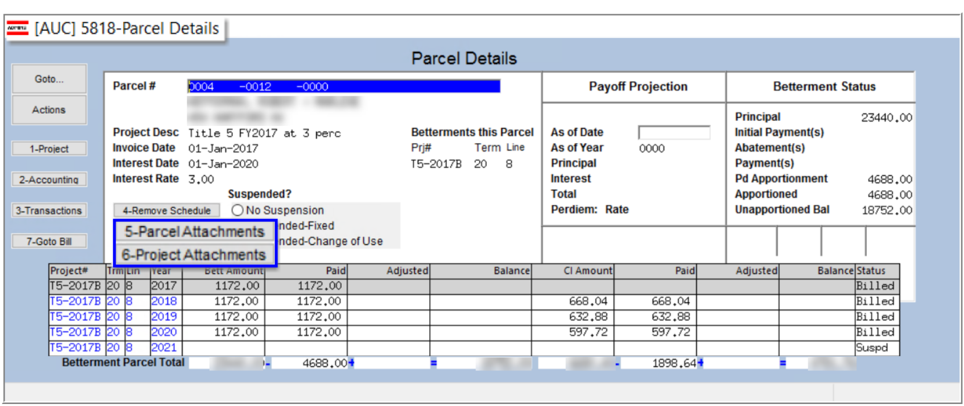
There are no system-supplied attachments for betterments.

All attachments added in this screen may be viewed or removed.

Figure 7 Select the [Attachment] button on #5820 Add/Manage Projects screen to access the #5817 Attachments screen

The Project attachments can also be accessed from the **Parcel Details** screen, using the **[6-Project Attachments]** button.

Tax ▸ Betterments ▸ Parcel Details



4.4.2. #5839 – Parcel Attach

Tax ▶ Betterments ▶ Parcel Details ▶ [5 Parcel Attachments]

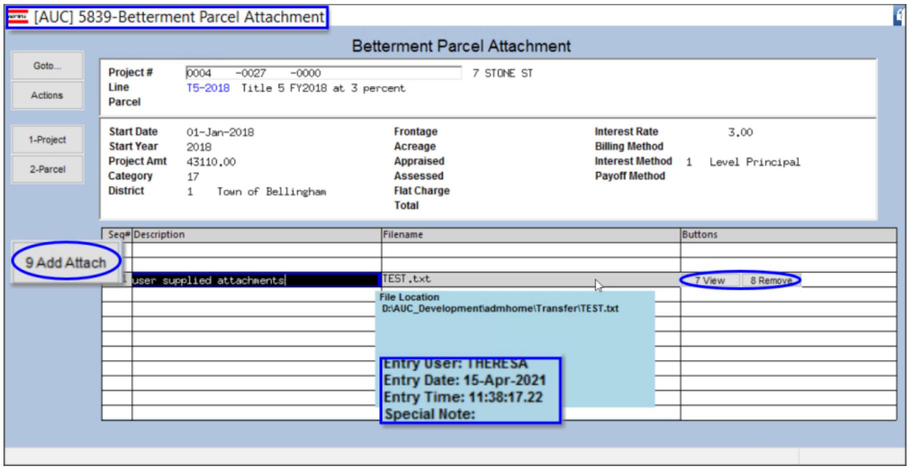


Figure 8 This attachment applies only to the listed Project and Parcel #

4.5. #9160 – Personal Property Deduction History Attach

Tax ▶ Abatements ▶ Personal Property Abatement History ▶ [2 Attachments]

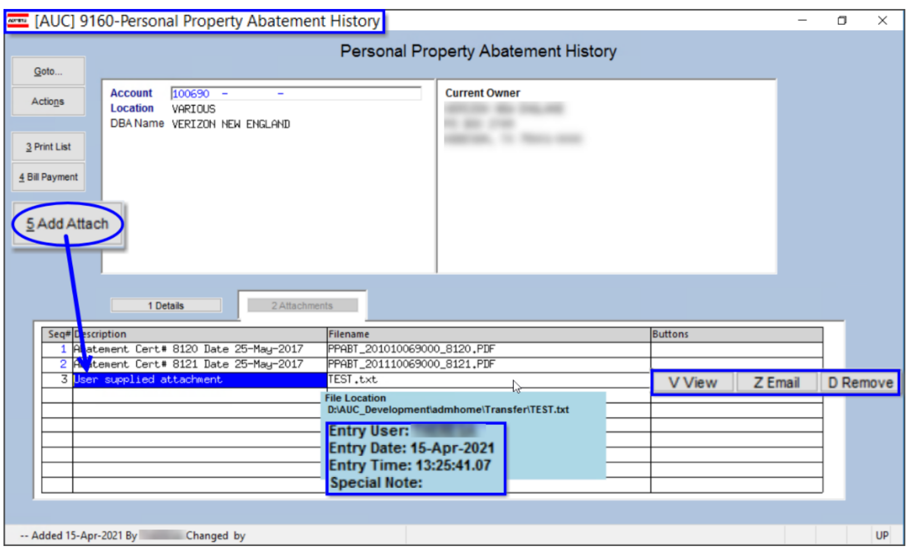


Figure 9 Both System and User-Supplied attachments on the Personal Property Abatement History screen

[ADM-AUC-SY-8171]

5. ADMINS.COM Training Videos

The **ADMINS** training videos were converted to provide the YouTube features, such as pause, rewind, fast forward, closed captions, and playing at faster speed. This training is restricted to "Customers Only". Need credentials? Go to: [Contact Us | ADMINS, Inc.] and follow the instructions in the quick start guide. Then, use the link to access the [Videos | ADMINS, Inc.]

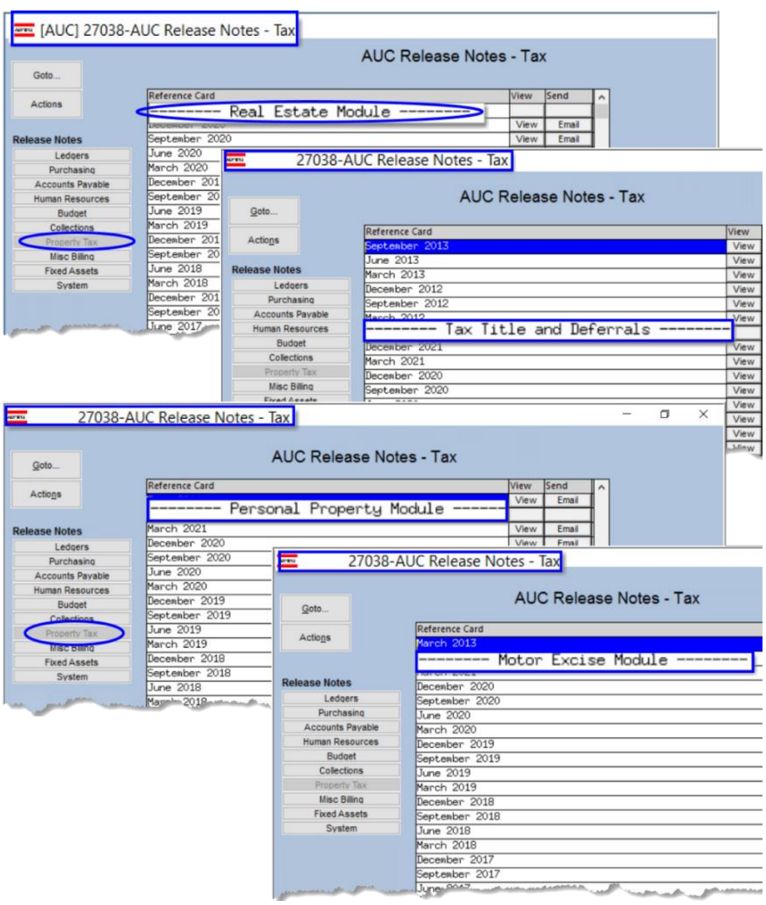
[ADM-AUC-WEB-2]

6. HELP REFERENCE LIBRARY

Figure 10 Help Categories and Release Notes structure are now the same

ADMINS made changes to the **Tax** release notes library structure. Now, each quarter's release notes are listed in chronological order with the most recent at the top, making it easier to find the most recent documents. See Figure 12 below.

6.1. Tax and Collections Release Notes Libraries [Enhancement]

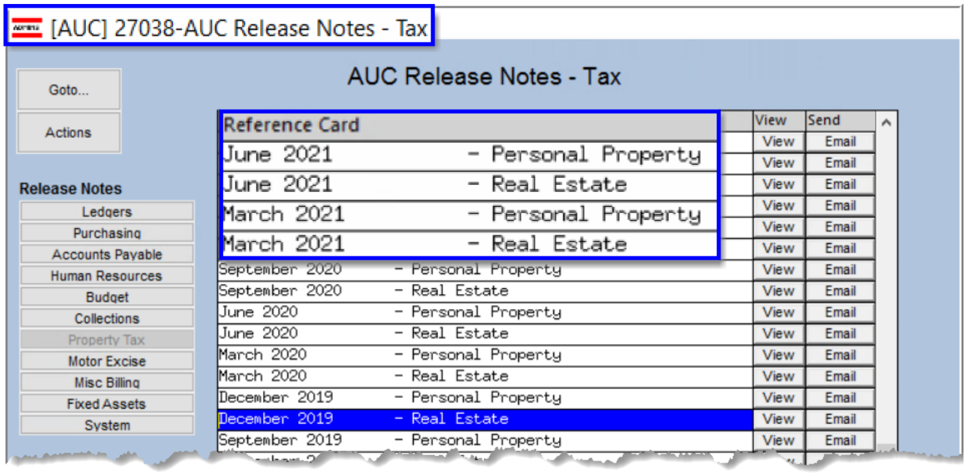


Tax Title/Deferrals used to be included in the **Tax** release notes; they were moved to the **Collections** release note library.

Motor Excise release notes are now in their own library, separate from **Tax**. This new structure mimics that of the Help Reference Library as shown in Figure 10.

Real Estate and **Personal Property** release notes will be found in the Tax library.

Figure 11 Before – Real Estate, Tax Title, Personal Property and Motor Excise were all in the Tax Release Notes



Instead of having the entire **Real Estate** section, followed by the **Personal Property** section, the release notes will now be sorted by month, with the most recent at the top.

Figure 12 Personal Property and Real Estate notes will be found in the Tax Release note library, most recent at the top

[ADM-AUC-SY-8189]

6.2. New or Updated Documents

ADMINS added the following new or updated documents to the Help Reference Libraries.

- SITE SPECIFIC RE–685 Cranston, RI Real Estate Tax Billing [Updated Section 3.9.4 Image]
- SYSTEM SY–170 System Administration Kit [Updated]