



# REAL ESTATE TAX BILLING

## RELEASE NOTES

JUNE 2021

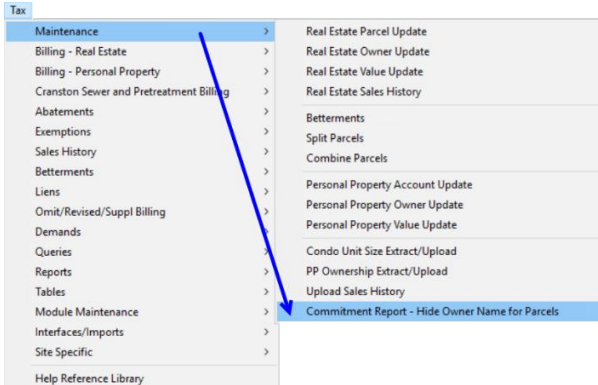
This document explains new product enhancements added to the **ADMINS Unified Community (AUC) REAL ESTATE TAX** system.

### CONTENTS

<b>1. SUPPRESS OWNER NAME ON REAL ESTATE COMMITMENT</b> .....	<b>2</b>
<b>2. BILLING</b> .....	<b>3</b>
2.1. Changing LUCs on Modify Exemptions Screen [Enhancement] .....	3
<b>3. FORMS TEXT AND PARAMETERS TABLE [ENHANCEMENT]</b> .....	<b>5</b>
<b>4. ATTACHMENTS HOVERTEXT [ENHANCEMENT]</b> .....	<b>6</b>
4.1. #4138 – Real Estate Bill Attachments .....	6
4.2. #4321 – Billing History (Reports from Billing) .....	6
4.3. #5365 – Real Estate Deduction History Attach .....	7
4.4. Real Estate Betterments .....	7
4.4.1. #5817 – Project Attach .....	8
4.4.2. #5839 – Parcel Attach .....	9
4.5. #9160 – Personal Property Deduction History Attach .....	9
<b>5. ADMINS.COM TRAINING VIDEOS</b> .....	<b>9</b>
<b>6. HELP REFERENCE LIBRARY</b> .....	<b>10</b>
6.1. Tax and Collections Release Notes Libraries [Enhancement] .....	10
6.2. New or Updated Documents .....	11



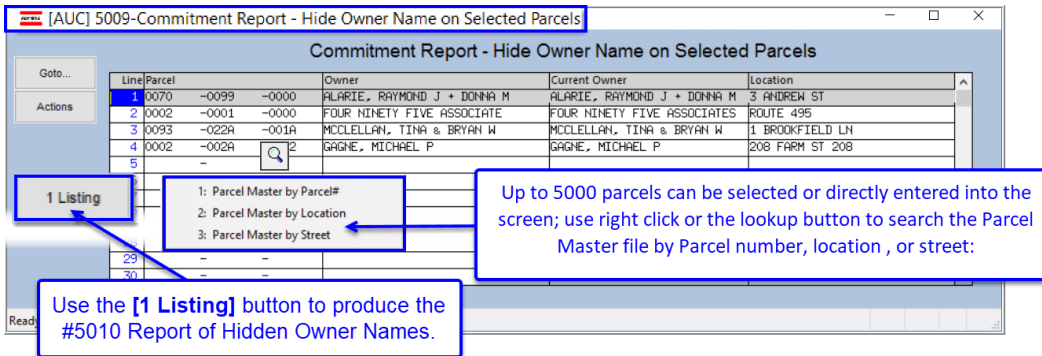
# 1. SUPPRESS OWNER NAME ON REAL ESTATE COMMITMENT



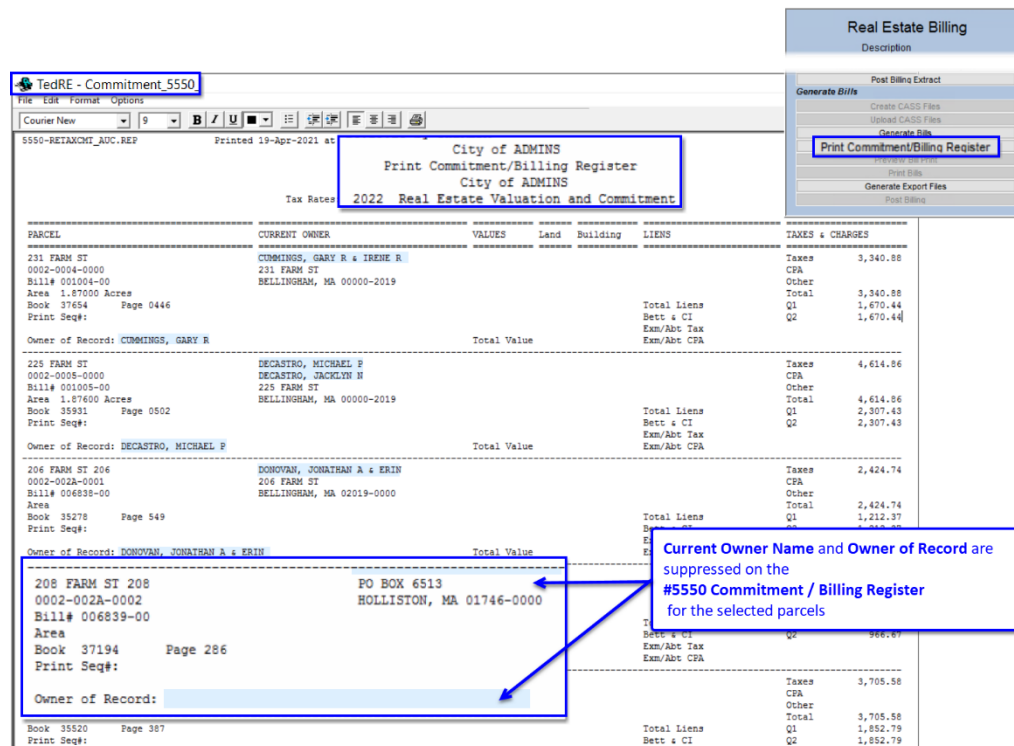
To protect public safety officials, municipalities compile a list of properties owned by public safety personnel and suppress the names from public databases. These suppressed names appear on the #5550 Commitment report produced as part of the billing process.

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.



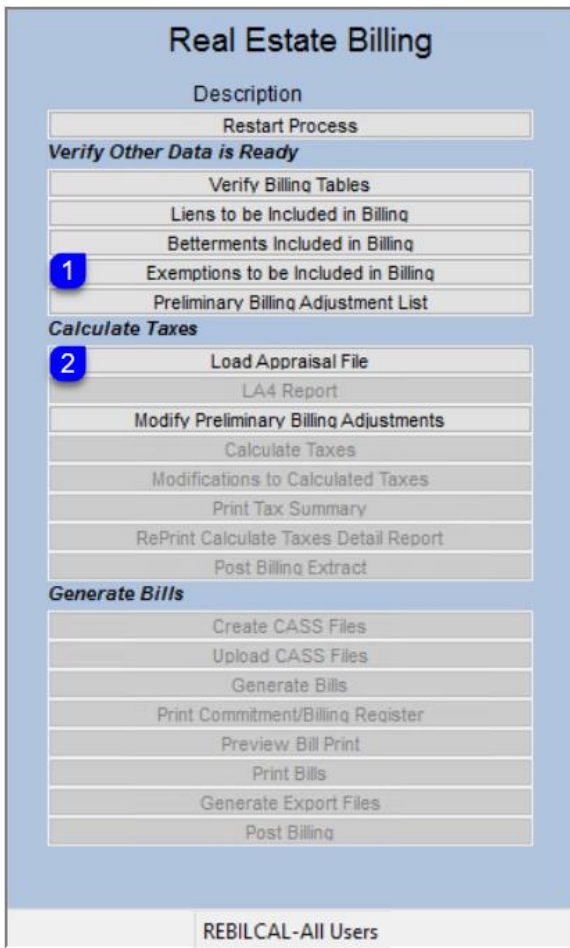
[BLG-SUP-SAPLAUC-1318]



## 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

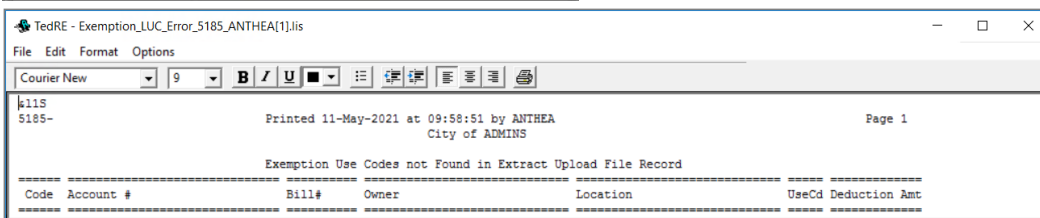


Figure 1 Report of Exemption Use Codes *Not* Found in the Extract Upload File

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)**



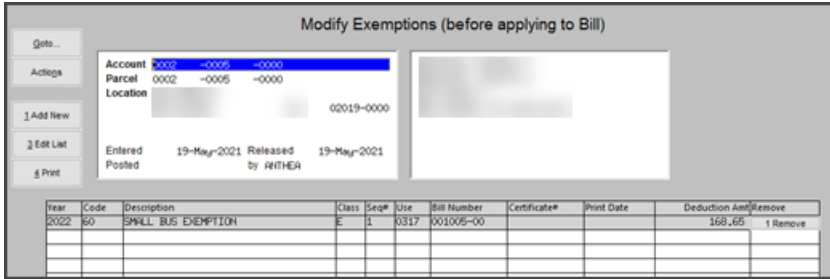


Figure 2 Before – There was only a [1 Remove] button on the screen

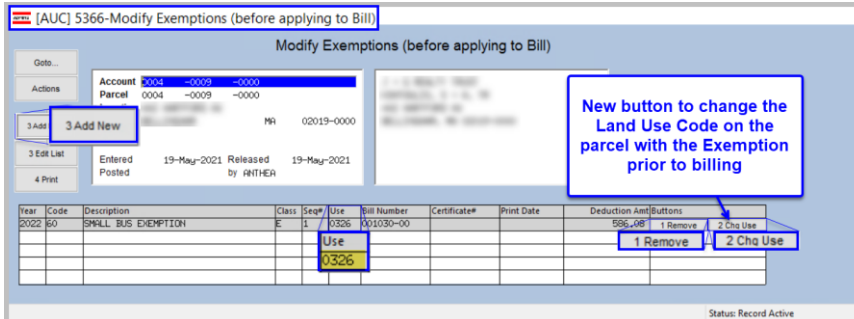
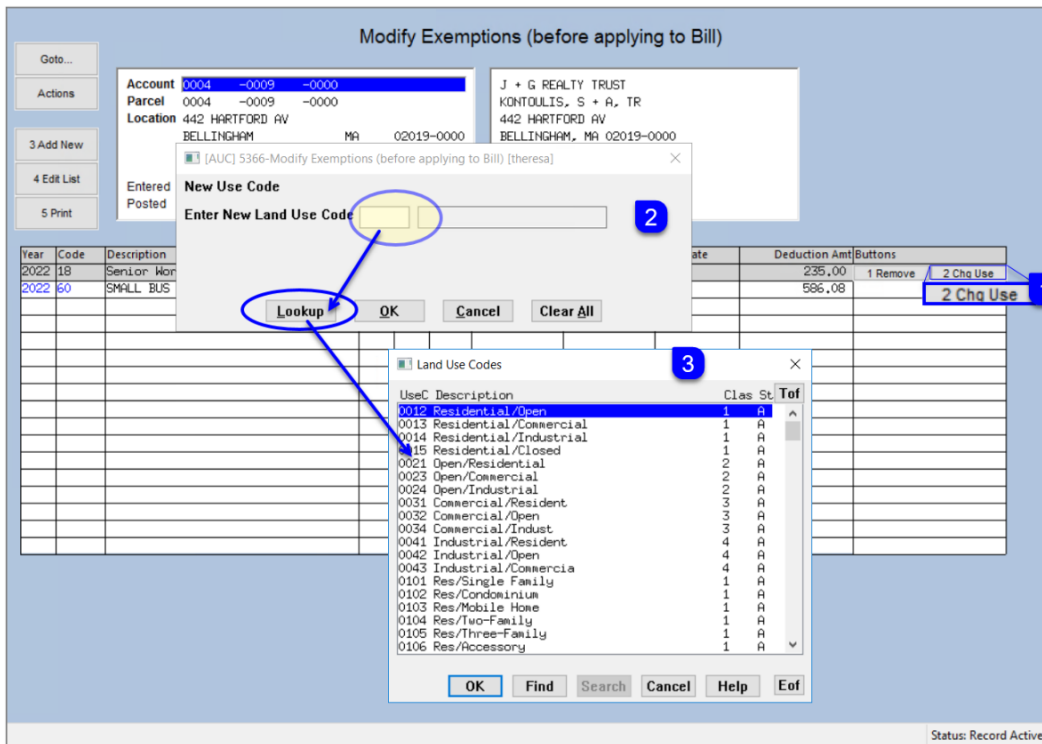


Figure 3 After – there is now a [2 Chg Use] button to change the LUC on the parcel

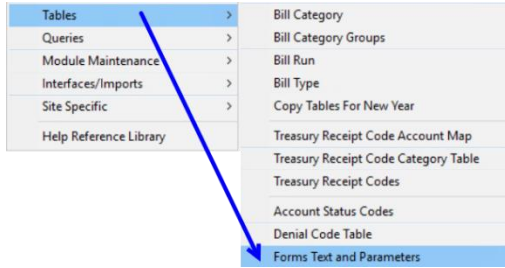
To change the existing LUC to a new LUC, click on the [2 Chg Use] button. Enter the new use code directly, or select it from the [Lookup], and click [OK]. The new LUC will be used for the exemption and will be available for a new exemption added to the parcel.



[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**].

**Forms Text and Parameters**

Bill Year: 2021 \* = Required

1 General | 2 Real Estate | 3 Personal Property | 4 Motor Excise | 5 Revenue Collection

Collector of Taxes \* Alexander Hamilton Phone# E08-657-2848  
 Collector Title \* Collector Fax# E08-966-5804  
 Email Address collector@admins.com County Norfolk  
 Misc Bill Phone# E08-657-2840

Accountant/Auditor Luca Pacioli Phone# E08-657-2807  
 Title Chief Financial Officer Fax# E08-966-4425  
 Email Address CFO@admins.com

Treasurer Janet Yellen Phone# E08-657-2840  
 Title Treasurer Fax# E08-966-5804  
 Email Address treasurer@admins.com

Assessor Mary Ellen Pleasant Phone# E08-657-2862  
 Assessor Title Town Assessor Fax# E08-657-2894  
 Email Address assessors@admins.com

Office Hours Line 1 \* Mon-Thur 8:30AM-4:30PM Office Hours Line 2 FRI 8:30AM - 1:00PM  
 Website URL admins.com

Status: Code Active Lkup UP

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]

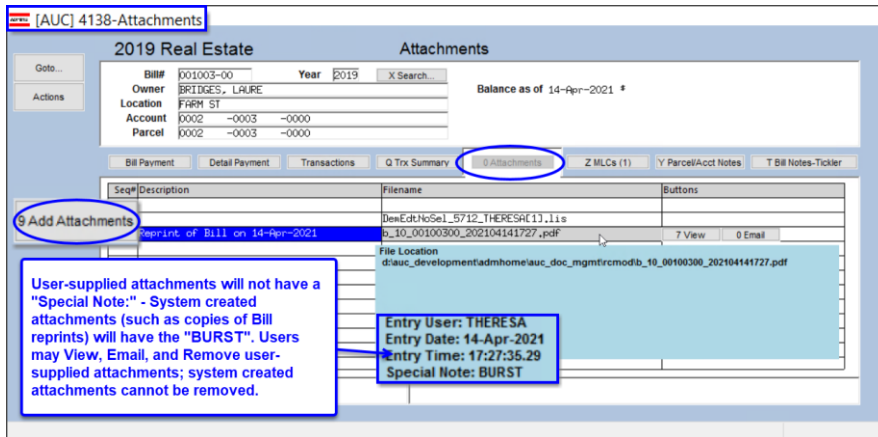


## 4. ATTACHMENTS HOVERTEXT [Enhancement]

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

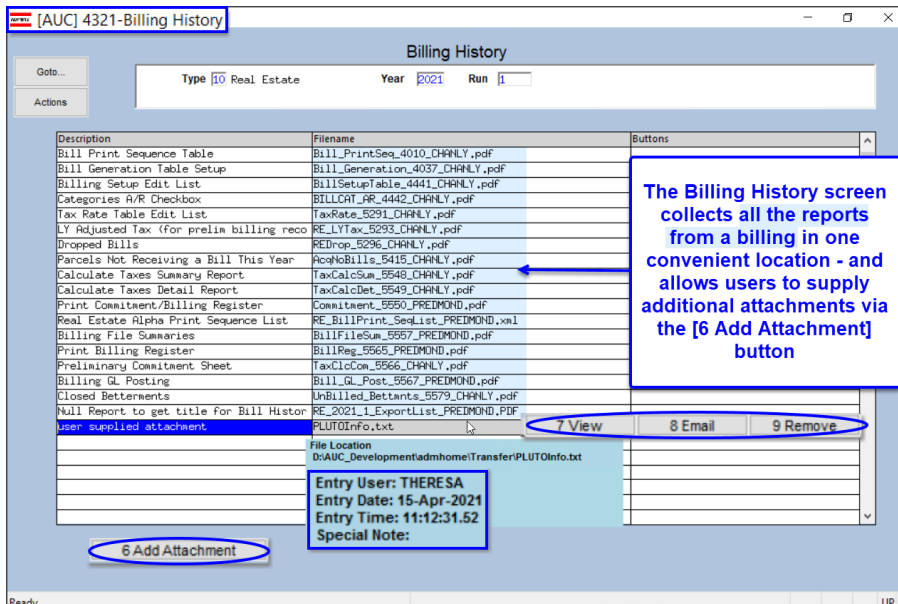


Figure 5 The Billing History screen is the access point for both system and user-supplied attachments



### 4.3. #5365 – Real Estate Deduction History Attach

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

The screenshot shows the 'Real Estate Deduction History' interface. At the top, the title bar reads '[AUC] 5365-Real Estate Deduction History'. The main content area is divided into several sections:

- Left Sidebar:** Contains navigation buttons: 'Goto...', 'Actions', '3 Print List', '4 Bill Payment', and '5 Add Attach' (circled in blue).
- Account Information:** A form with fields for 'Account' (0002 -0001 -0000), 'Parcel' (0002 -0001 -0000), and 'Location' (ROUTE 495).
- Current Owner:** A text area containing owner details.
- Attachment Tabs:** Two tabs are visible: '1 Details' and '2 Attachments' (circled in blue).
- Attachment Table:** A table with columns 'Seq#', 'Description', 'Filename', and 'Buttons'.
 

Seq#	Description	Filename	Buttons
1	Abatement Cert# 9000027 Date 04-Mar-2015	REABT_201500676600_9000027.PDF	V View Z Email
2	user supplied attachment	File Location e:\admhome\lauc_doc_mgmt\REMOD\2015\REABT_201500676600_9000027.PDF	
- Attachment Details:** A pop-up box for the second attachment shows: 'Entry User: [redacted]', 'Entry Date: 26-Feb-2015', 'Entry Time: 11:33:39.33', and 'Special Note: BURST'.

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]

**Add/Manage Projects**

Project # **15-2021** Posted on 22-Mar-2021

Description **new title 5** CI Des **new title 5 CI**

Invoice Date: 01-Apr-2021, Interest Date: 01-May-2021, Start Year: 2021, District: [blank], Interest Rate: 3.00, Project Amt: 100000.00, Billing Category: 17 Title 5 Betterment, CI Bill Category: 18 Title 5 Betterment.

Line	Parcels in Project	Owner Name	Term	Principal	Init Payment	Abatement	Payoff	Pd Appor	Appor	UnAppor Bal	Per Annum	Fig
1	0009	-0112	-000	20	25000.00			25000.00		25000.00	1250.00	
2	0009	-0112	-000	20	25000.00			25000.00		25000.00	1250.00	
3	0009	-0112	-000	20	25000.00			25000.00		25000.00	1250.00	
4	0009	-0112	-000	20	25000.00			25000.00		25000.00	1250.00	

Buttons: 7-Reports, 9-Accounting, 0-Parcel Detail, Attachment, Change Term, Delete Parcel

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.

**Betterment Project Attachments**

Project # **15-2021**  
Description **new title 5** CI Des **new title 5 CI**

Start Date: 01-Apr-2021, Start Year: 2021, Project Amt: 100000.00, District: 17, Frontage: [blank], Acreage: [blank], Appraised: [blank], Assessed: [blank], Flat Charge: 25000.00, Total: 25000.00, Interest Rate: 3.00, Billing Method: 1 Level Principal, Interest Method: [blank], Payoff Method: [blank]

Seq#	Description	Filename	Buttons
1	User supplied project attachment!	foo2.txt	7 View 8 Remove

File Location: D:\AUC\_Development\admhome\Transfer\ATTACH\foo2.txt

Entry User: THERESA  
Entry Date: 15-Apr-2021  
Entry Time: 11:55:05.31  
Special Note:

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

**Parcel Details**

Parcel # **2004 -0012 -0000**

Project Desc: Title 5 FY2017 at 3 perc, Invoice Date: 01-Jan-2017, Interest Date: 01-Jan-2020, Interest Rate: 3.00

As of Date: [blank], As of Year: 0000, Principal: 668.04, Interest: 632.88, Total: 597.72, Perdiem: Rate

Betterment Status: Principal Initial Payment(s): 23440.00, Abatement(s): [blank], Pd Apportionment: 4688.00, Apportioned: 4688.00, Unapportioned Bal: 18752.00

Buttons: 4-Remove Schedule, 5-Parcel Attachments, 6-Project Attachments

Project#	Term	Year	Net Amount	Paid	Adjusted	Balance	CI Amount	Paid	Adjusted	Balance	Status
T5-2017B	20	8	2017	1172.00	1172.00						Billed
T5-2017B	20	8	2018	1172.00	1172.00		668.04	668.04			Billed
T5-2017B	20	8	2019	1172.00	1172.00		632.88	632.88			Billed
T5-2017B	20	8	2020	1172.00	1172.00		597.72	597.72			Billed
T5-2017B	20	8	2021								Suspd
<b>Betterment Parcel Total</b>				4688.00				1898.64			





### 4.4.2. #5839 – Parcel Attach

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

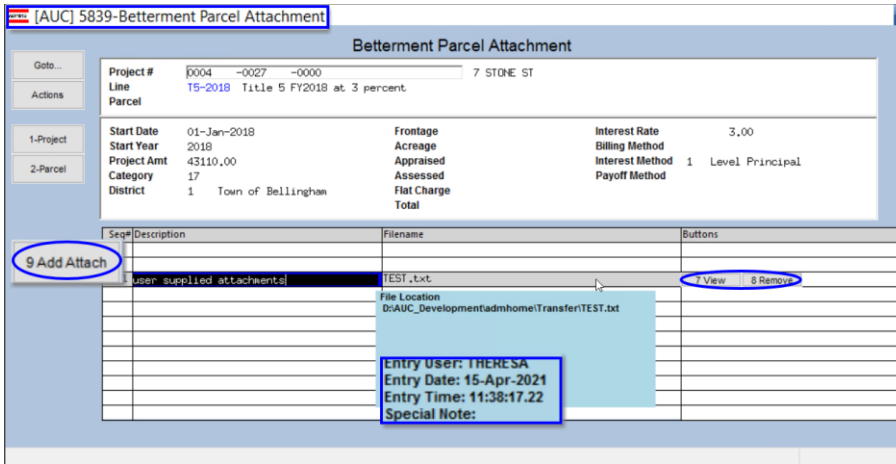


Figure 8 This attachment applies only to the listed Project and Parcel #

### 4.5. #9160 – Personal Property Deduction History Attach

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

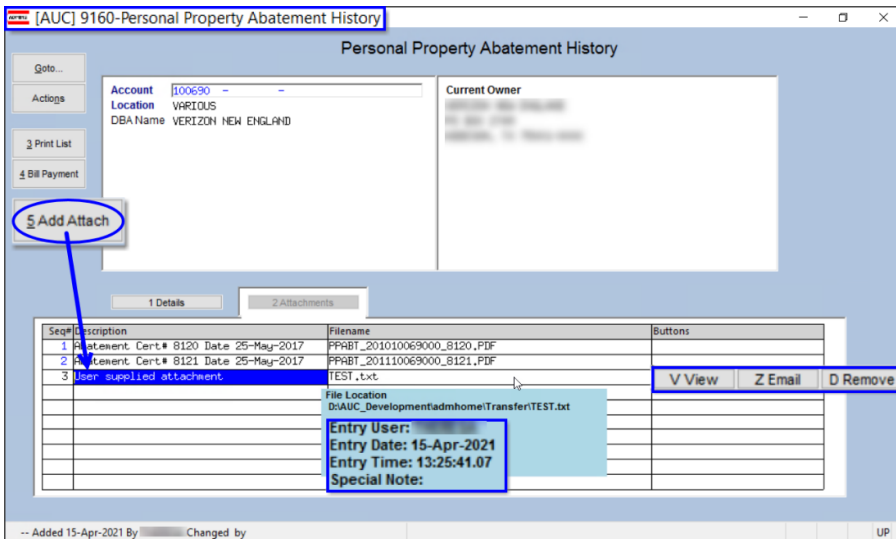


Figure 9 Both System and User-Supplied attachments on the Personal Property Abatement History screen

[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

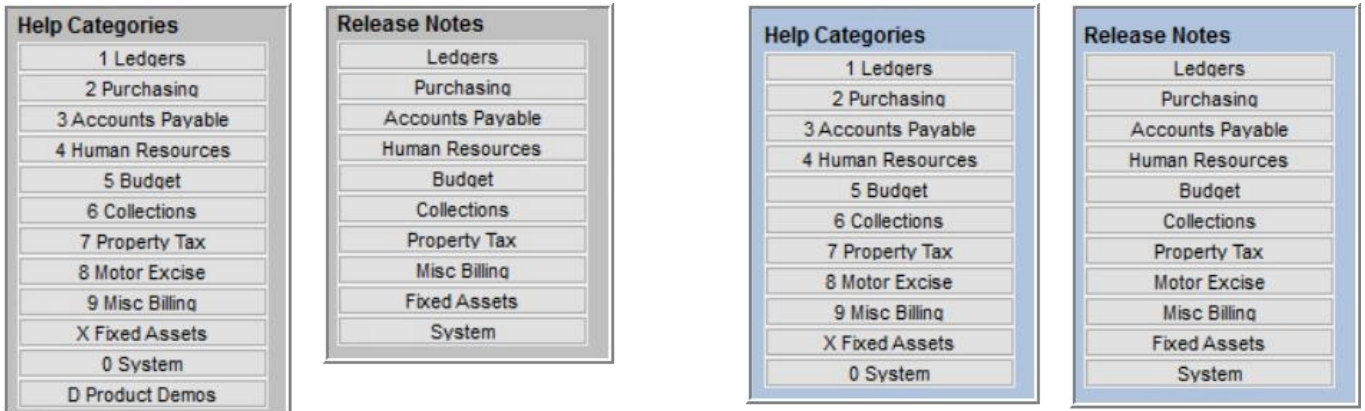


Figure 10 Help Categories and Release Notes structure are now the same

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]

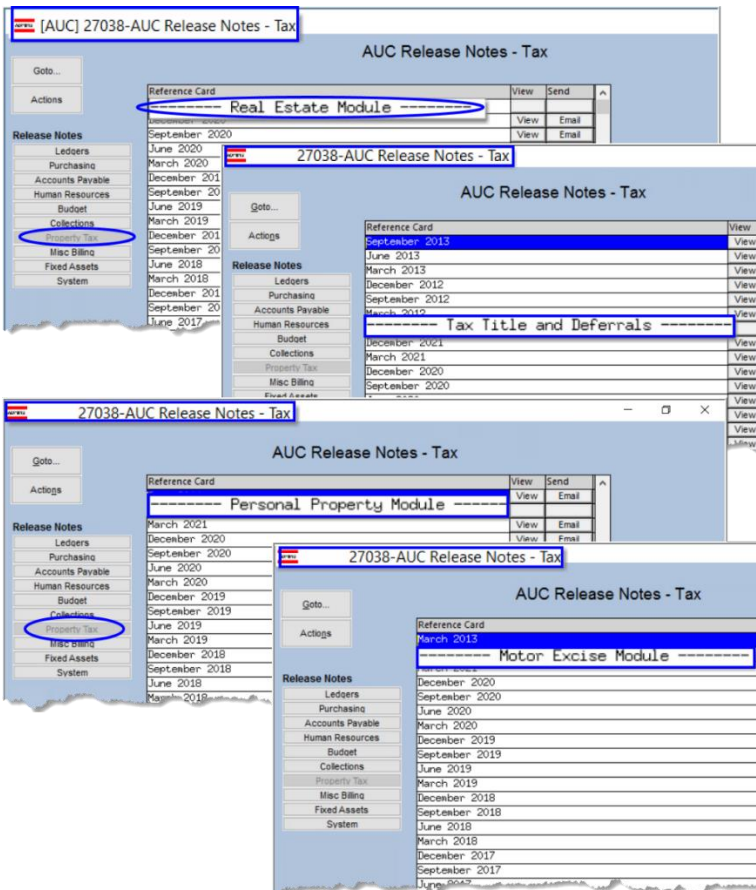
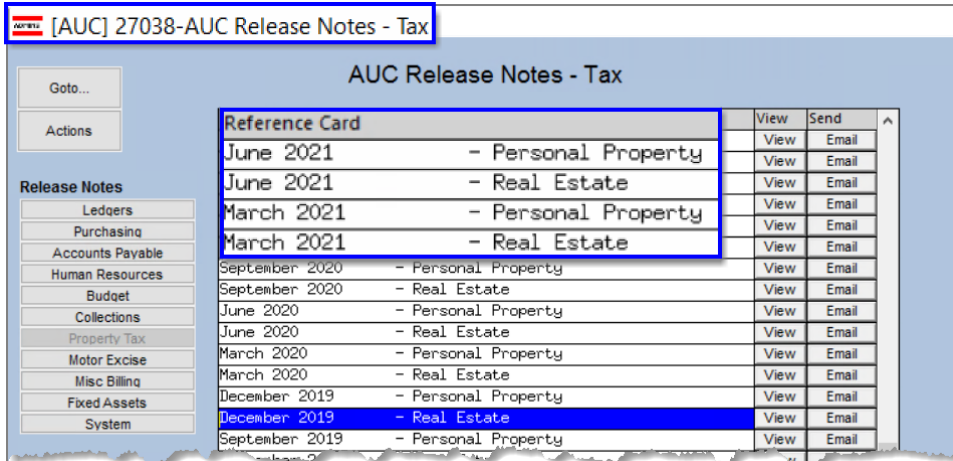


Figure 11 Before – Real Estate, Tax Title, Personal Property and Motor Excise were all in the Tax Release Notes

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.



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]