



REAL ESTATE TAX BILLING

RELEASE NOTES

MARCH 2020

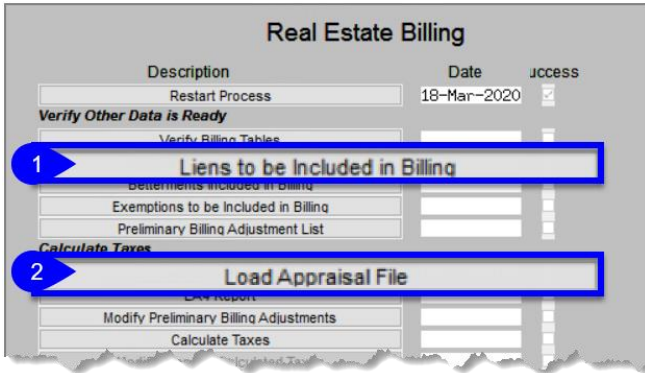
This document explains new product enhancements added to the **ADMINS Unified Community (AUC) REAL ESTATE TAX** system.

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1. BILLING



1.1. Liens to be Included in Billing ▶ “Trash” vs. “Demolition” [Fix]

The Bill Category table uses #05 through 14 for Liens on Real Estate. Each site maintains the table within those guidelines. There was an issue with reporting on Liens using the 09 category. As originally implemented, the description for the category was hard coded in the **Liens to be Included in Billing** report to be a **Demolition** lien. **ADMINS** changed the report to use the descriptions from the **Bill Category** table.

Year	Type	Description	Interest	Charge	to A/R	Betterment	Incl RE/PP Demands	Include in Refund Refunds	Include in Interest	Include in Balance	Include in Daily Bal	Post Order	Alt Pst Order
2021	10	Real Estate										99	99
01		Tax											
02		CPA											
03		Unused											
04		Unused											
05		Water Lien										30	30
06		Water Ln CI										31	31
07		Sewer Lien										40	40
08		Sewer Ln CI										41	41
09		Trash Lien										20	20
10		Trash Ln CI										21	21
11		Demolition Lien										25	25
12		Demolition Ln CI										26	26
13		NSF Fee Lien										27	27

Figure 1 The Bill Category Real Estate record showing the numbered categories and descriptions

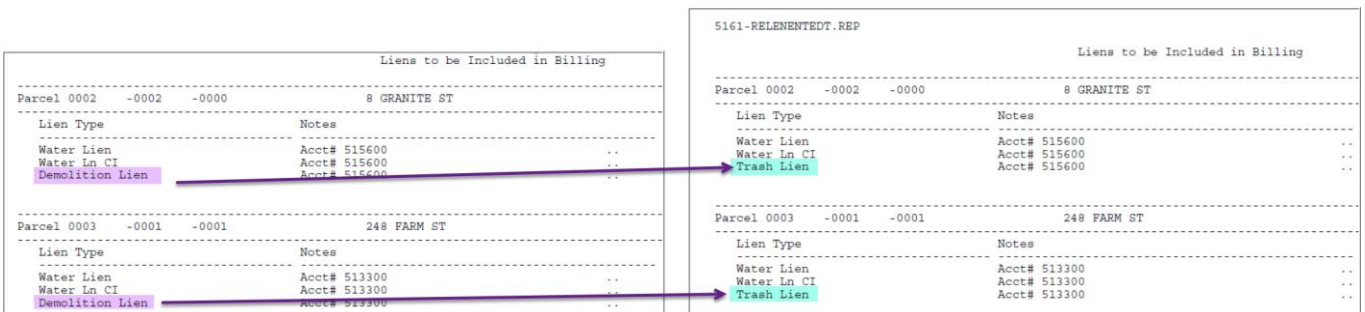


Figure 2 Before Liens to be included in Billing Edit List

After – the descriptions from the Bill Category table are used

[ADM-AUC-RE-5595]



1.2. Upload Appraisal File [Fix]

In the past, if other users were viewing or updating a record in the permanent Real Estate files (such as the Parcel Update Screen), the **[Load Appraisal File]** would not work correctly.

ADMINS corrected this and the upload will work when other users are accessing the screens. Select **Tax ▶ Billing - Real Estate ▶ Real Estate Billing** to access the step menu.

[ADM-AUC-RE-5596]

2. ABATEMENTS [Enhancement]

Prior to the software update, if an abatement was entered on a bill, and there was no balance on the bill, the abatement was applied to the last bill. Transferring prior payments to the abated quarter did not work, since the payment transfer amount can only be up to the payment amount on the bill. This left a balance on Quarter 4 and a credit on Quarter 3. This created a problem because interest was being calculated for the unpaid balance on Quarter 4, even though the bill netted to zero.

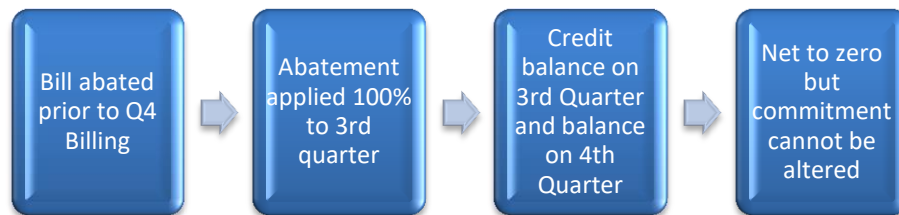


Figure 3 Before abatement applied 100% to 3rd Quarter

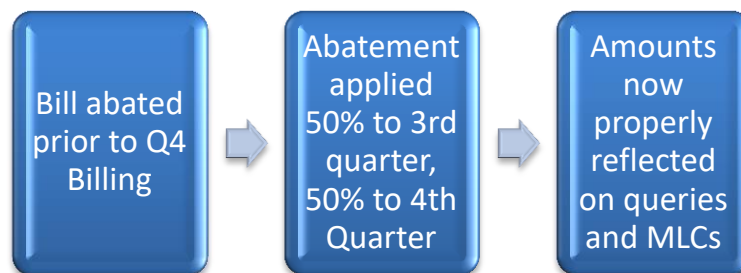


Figure 4 After – Abatement split 50% / 50% between 3rd and 4th Quarters

Charges on a bill cannot be altered such that it no longer matches the commitment. **ADMINS** changed all abatements to split 50%/50% on 3rd & 4th quarter because refunds and transfers can only apply to the amount paid, per statute.

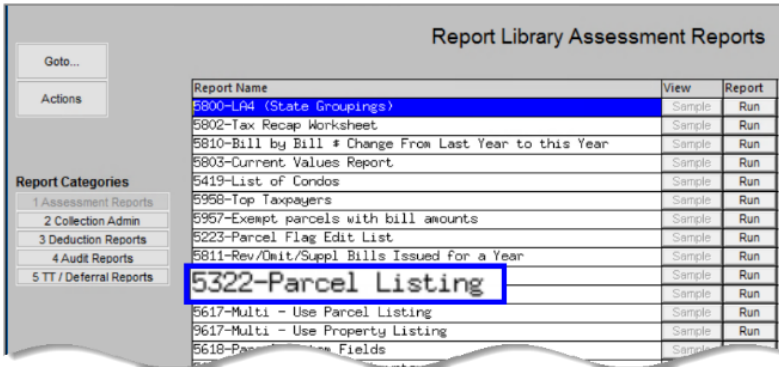
[ADM-AUC-RE-5592]



3. REPORTS [Enhancement]

ADMINS added content to a report and fixed a folder location/output file name.

3.1. Parcel Listing Report [Enhancement]



ADMINS added a class column to the Parcel Listing report. Select **Tax > Reports > [1 Assessment Reports] #5322 Parcel Listing** to run the report.

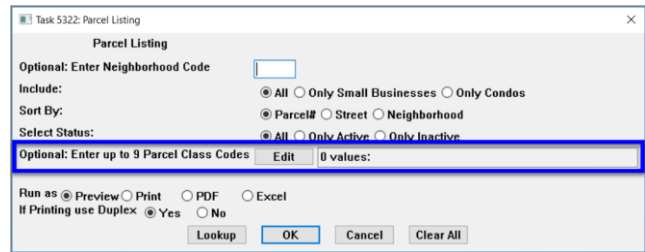
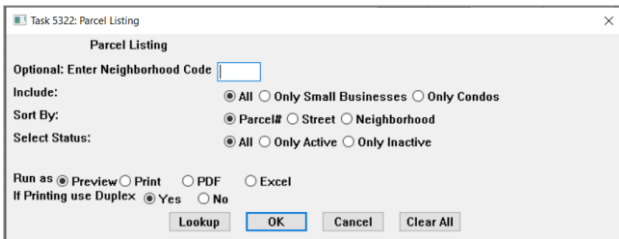


Figure 5 Parcel listing prompt “Before” without class filter “After” with the optional filter on Parcel Class Codes

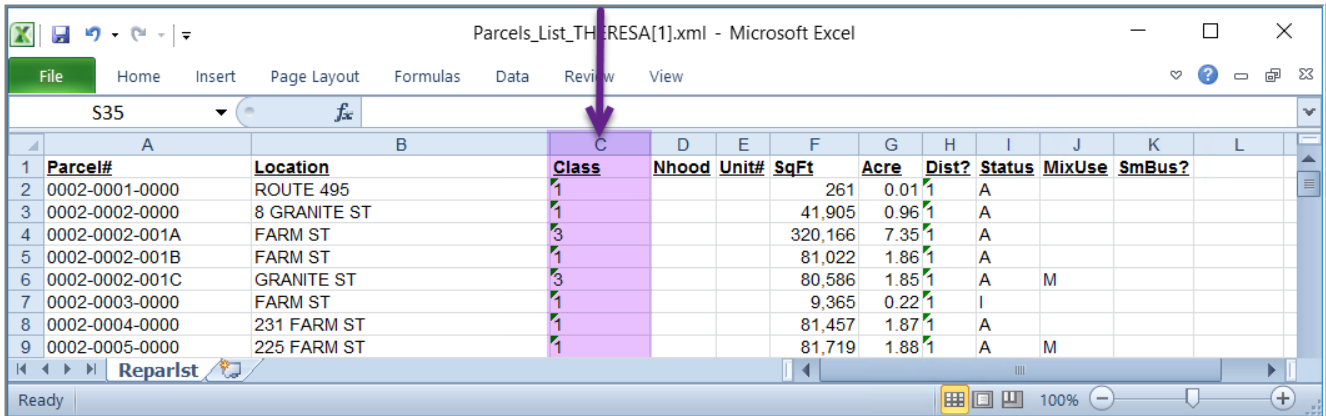


Figure 6 Added the Class column to the Excel® output

[ADM-AUC-RE-5593]



3.2. List of Condos Report [Fix]

Report Name	View	Report
5900-LA4 (State Groupings)	Sample	Run
5902-Tax Recap Worksheet	Sample	Run
5810-Bill by Bill # Change From Last Year to this Year	Sample	Run
5803-Current Values Report	Sample	Run
5419-List of Condos	Sample	Run
5907-Exempt parcels with bill amounts	Sample	Run
5223-Parcel Flag Edit List	Sample	Run
5811-Rev/Omit/Suppl Bills Issued for a Year	Sample	Run
5322-Parcel Listing	Sample	Run
5213-Parcel Split/Combination History	Sample	Run
5213-Parcel Split/Combination History	Sample	Run

The **List of Condos** report output was being saved as a “**Tax Title**” report in the Collections repository instead of as a “**List of Condos**” report in the Real Estate storage area.

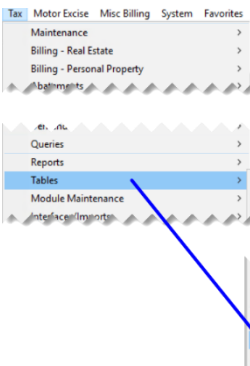
ADMINS corrected this and now the report is saved with an appropriate output file name in the Real Estate storage area.

To run the report, select **Tax ▶ Reports ▶ Report Library ▶ [1 Assessment Reports]**.

The report is easy to find in the Real Estate Folder when retrieving an output file.

[ADM-AUC-RE-5593]

4. COMBINED BILLING TABLE [Enhancement]



Taxpayers can have multiple parcels, and as such, multiple Real Estate Tax bills. To provide a consolidated list of bills for a taxpayer, use the **Combined Account Table**. Select **Tax ▶ Tables ▶ Combined Parcel Table (Real Estate)** to group multiple bills for an owner.

Note: this feature allows grouping of parcels that currently exist in the bill history file. Grouping and ungrouping does not add or remove parcel bills from bill history.

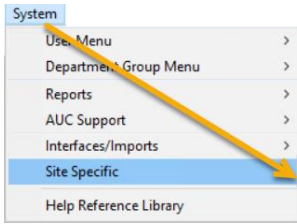


Learn about this new feature in the **RE-640 Combined Real Estate Billing Table** document in the Help Reference Library.

[ADM-AUC-RC-8469]



5. COPY LIVE TO TRAINING [ENHANCEMENT]



ADMINS is pleased to offer this new feature. Now, users with a security level of **20** can kick off a copy of live data to training. To initiate copying live to training, select:

System ▶ Site Specific ▶ Copy Live to Training (Batch)

This process will refresh the training module, so verify with other department heads that they are not in the middle of doing any important testing.



Read the detailed instructions in the **SY-175 Copy Live to Training (Batch)** document in the **Help Reference Library**.

[ADM-AUC-SY-8114]

6. HELP REFERENCE LIBRARY

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

6.1. New or Updated Documents

- TABLES RE-640 Combined Real Estate Billing Table [New]
- SYSTEM RE-770 System Administration Kit [Updated]
- SY-175 Copy Live to Training (Batch) [New]