



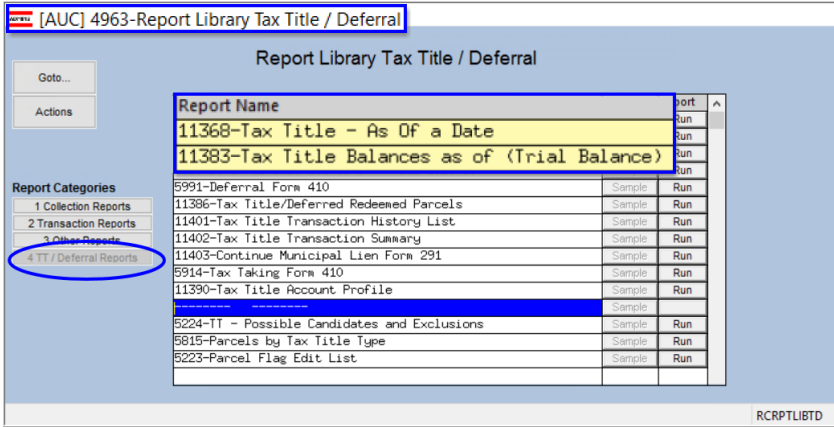
This document explains new product enhancements added to the **ADMINS Unified Community (AUC)** for Windows **TAX TITLE** system.

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# 1 REPORTS



ADMINS added an “Original Taking Bill Year” column to the Excel® version of the #11368 Tax Title - As of a Date Report & all versions of the #11383 Tax Title Balances as of (Trial Balance) Report.

This is helpful for parcels with an original taking date that is not in the same fiscal year as the taking. The report # was added to the resulting report names to make it easier to find when retrieving output.

The Original Taking BILL Year is the Bill Year that is being put into tax title and could be different from the calendar year and the fiscal year

## 1.1 #11368 Tax Title - As of a Date Report [Enhancement]

This additional column is available on the Excel® version of the report. Physical page size limitation does not allow for the additional column when run as Print/Preview/PDF®.)

Year Bill#	Owner Name	Location	Owner	Charges	Payments	Adjustments	Refunds	Balance	Accrued Int	14-Sep-2021	Original Taking	Last Assessed Value
2019 006768-00				2002.12				2002.12	109.70	2,111.82		
2020 006768-00				1515.92				1515.92	81.74	1,597.66		
Total 0003-0001-0002 244 FARM ST				3518.04				3518.04	191.44	3,709.48	5/12/2021	473,500
2002 006781-00				85.44				85.44	249.99	335.43		
2003 006781-00				100.75				100.75	294.04	394.79		
2004 006781-00				105.39				105.39	290.41	395.80		
2005 006781-00				104.8				104.8	272.09	376.89		

Figure 1 Before – only the Original Taking Date was shown

Charges	Payments	Adjustments	Refunds	Balance	Accrued Int	03-Feb-2022	Original Taking Year	Original Taking Date
1643.94				1643.94	106.65	1,750.59	2020	9/8/2021
6930.99				6930.99	449.66	7,380.65	2020	9/8/2021
2769.66				2769.66	4,317.11	7,086.77	2020	9/8/2021
1873.25				1873.25	4,095.11	5,973.36	2020	7/1/2001
1308.49				1308.49	894.60	2,203.09	1992	10/30/1992
721.74	640			81.74	3.51	85.25	2013	7/28/2014
							2020	9/8/2021

Figure 2 After – the Original Taking Bill Year and Original Taking Date are listed



## 1.2 #11383 Tax Title Balances as of (Trial Balance) Report [Enhancement]

Bill#	Owner	Location	Parcel	Category	Description	Charges	Abate	Deduct	Adj-Oth	Refunds	Payments	Balance	Original Taking	Last Assessed Value	TT Attorney
				01	Tax	1,848.37						1,848.37			
				30	Advertising Fee	32.75						32.75			
				33	Demand	5.00						5.00			
				34	Advertising Prep Fee	10.00						10.00			
				35	Instrument of Taking Pre	106.00						106.00			
					Total Bill Year: 2019	2,002.12						2,002.12			
				01	Tax	1,510.92						1,510.92			
				33	Demand	5.00						5.00			
					Total Bill Year: 2020	1,515.92						1,515.92			
006768-00			0003 -0001 -0002			3,518.04						3,518.04	5/12/2021	473,500	CITY

Figure 3 Before – only the Original Taking Date was shown

The additional column is available on the Excel® version of the report:

Bill#	Owner	Location	Parcel	Category	Description	Charges	Abate	Deduct	Adj-Oth	Refunds	Payments	Balance	Original Taking Year	Original Taking Date	Last Assessed Value	TT Attorney
				01	Tax	1,480.06						1,480.06				
				30	Advertising Fee	42.88						42.88				
				33	Demand	5.00						5.00				
				34	Advertising Prep Fee	10.00						10.00				
				35	Instrument of Taking Pre	106.00						106.00				
					Total Bill Year: 2020	1,643.94						1,643.94				
001007-00						1,643.94						1,643.94			431,900	
				01	Tax	6,767.11						6,767.11	2020	9/8/2021		
				30	Advertising Fee	42.88						42.88				
				33	Demand	5.00						5.00				
				34	Advertising Prep Fee	10.00						10.00				
				35	Instrument of Taking Pre	106.00						106.00				
					Total Bill Year: 2020	6,930.99						6,930.99				
001035-00						6,930.99						6,930.99			356,600	

Figure 4 After – the Original Taking Bill Year and Original Taking Date are listed

City of ADMINS  
Tax Title Balances as of (Trial Balance)

Bill Type: 70 Tax Title as of 14-Sep-2021

Bill#	Owner and Address	Category	Charges	Abatements/ Deductions	Adj-Oth	Refunds	Payments	Balance	Original Taking	Last Assessed Value	TT Attorney
006768-00		0003 -0001 -0002									
		01	1848.37					1848.37			
		30	32.75					32.75			
		33	5.00					5.00			
		34	10.00					10.00			
		35	106.00					106.00			
*** Total ***	Bill Year: 2019		2002.12					2002.12			
		01	1510.92					1510.92			
		33	5.00					5.00			
*** Total ***	Bill Year: 2020		1515.92					1515.92			
Total:			3518.04					3518.04	12-May-2021	473500	CITY

Figure 5 Before – the Original Taking Bill Year was not shown



The additional column is also available on the Print/Preview/PDF® version of the report:

Bill#	Owner and Address Category	Charges	Abatements/Deductions	Adj-Oth	Refunds	Payments	Balance	Original Taking Year	Original Taking Date
001007-00									
01	Tax	1480.06					1480.06		
30	Advertising Fee	42.88					42.88		
33	Demand	5.00					5.00		
34	Advertising Prep Fee	10.00					10.00		
35	Instrument of Taking Pre	106.00					106.00		
*** Total *** Bill Year: 2020		1643.94					1643.94	2020	08-Sep-2021
Total:		1643.94					1643.94		

Figure 6 After – the Original Taking Bill Year and Original Taking Date are listed

[BLG-SUP-SAPLAUC-1437]

## 2 TABLES [Enhancement]

ADMINS added a Fee/GL Post Date column to the #11352 Additional Fee Edit List reporting. This provides an opportunity to check the edit list and anticipated posting date prior to posting to be sure it will post to the correct date.

### 2.1 Additional Fees –Edit List

To access the screen, from the menu, select:

Collections ▶ Tax Title ▶ Enter Additional fees

Parcel Number	Year	Fee Category	Notes	Fee Amount	Fee/GL Date
0004 -0014 -0000	2020	70 Legal Fees	2020 legal fee	175.00	30-Jun-2021
0003 -0003 -0000	2020	70 Legal Fees	Fee for 2020	75.00	03-Mar-2022
0003 -0001 -0002	2020	70 Legal Fees	fee for prior year	75.00	03-Mar-2022

Bill#	Year	Name on Bill / Current Owner	Parcel# / Location	Notes / Category	Charges
006768-00	2020		0003 -0001 -0002	Note 70 Legal Fees	111.00
*** Grand Total *** #Entries: 1					111.00

Figure 7 Before – the added fee edit list had no GL date

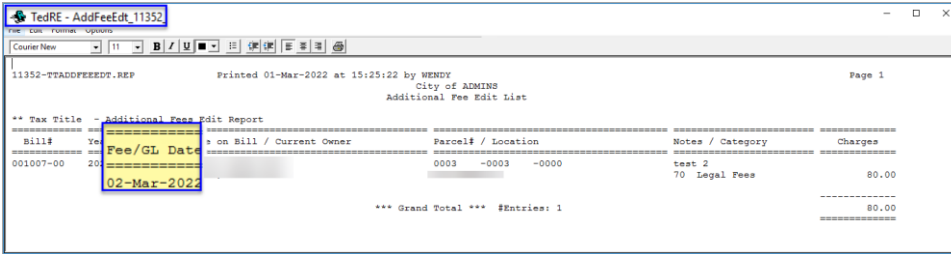


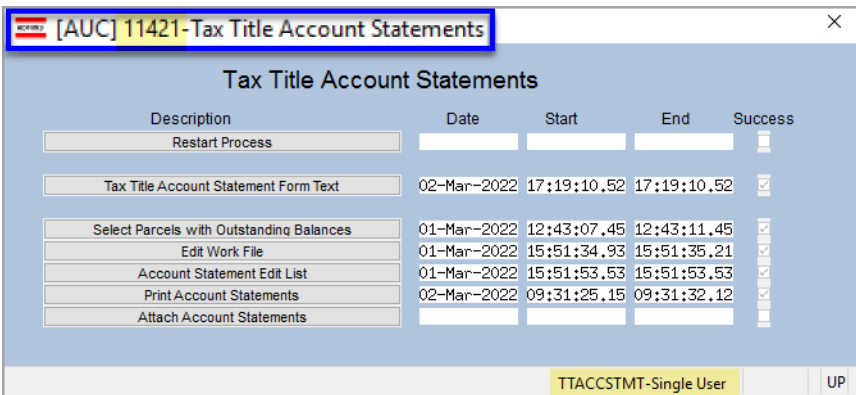
Figure 8 After – column with Fee/GL Date

[ADM-AUC-TT-3870]

### 3 TAX TITLE ACCOUNT STATEMENTS PROCESS

To begin, from the menu, select:

Collections ▶ Tax Title ▶ Tax Title Account Statements



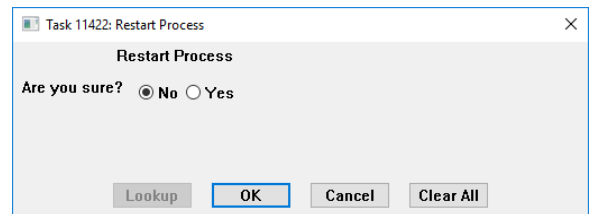
The steps menu will guide the “single user” process, meaning that if the user “Jane” begins the process, only “Jane” will be able to complete the process.

This allows sites with multiple staff members to each run the process without interfering with one another. The steps are described in the sections below.

#### 3.1 Restart Process

The first step is labelled

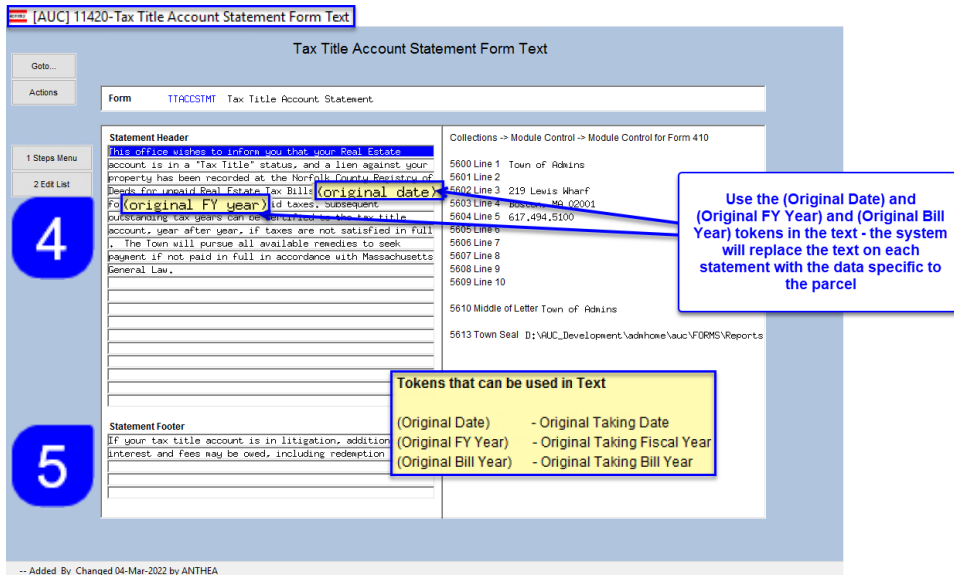
**Restart Process**; use this step to discard any work in process and begin again. The default radio button is set to “ No”; be sure to select the “ Yes” radio button to clear the Date, Start, End, and Success indicators from the steps to start from scratch.





### 3.2 Tax Title Account Statement Form Text

Edit the text that will appear on the statements using this step. There are 20 fields, each 60 characters, to enter the “body” of the letter to be sent to each owner. In addition, there are five fields that will print as a “closing” at the bottom of each letter. Click on the **Tax Title Account Statement Form Text** button to access the screen:



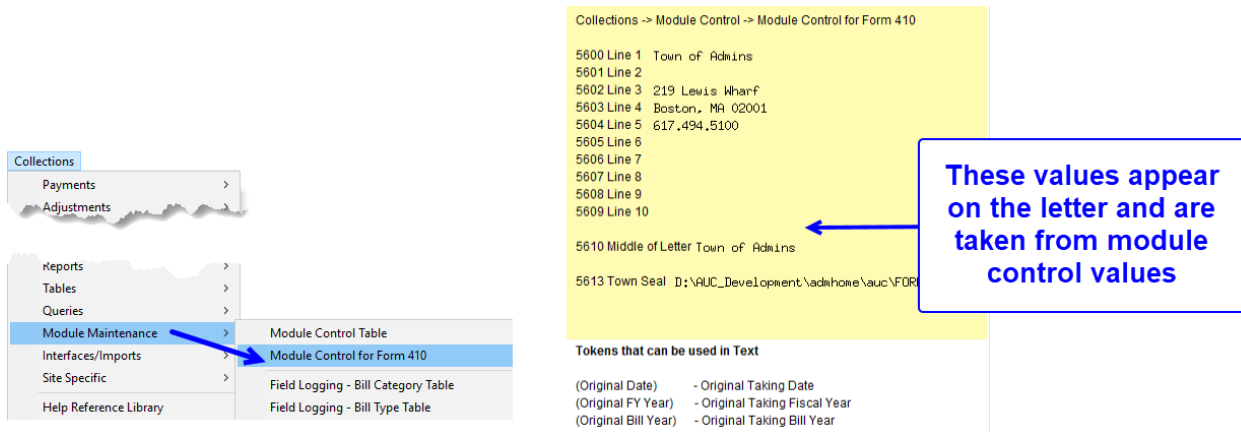
There are three “tokens” used to customize the text in the body of the letter so that each statement can have a unique “Original Date”, “Original Bill Year”, and “Original Fiscal Year” referenced\* in the body of the letter.

Use the tokens by entering (Original Date), (Original FY Year) or (Original Bill Year) \*use parenthesis to tell the process to substitute the value.

Figure 9 The Tax Title Account Statement Form Text screen

The **(Original Date)** means original tax taking date. **(Original FY Year)** is the fiscal year that the original taking was done. The **(Original Bill Year)** token is the bill year for which the original taking was done.

In addition to the data entered on the form above, the statements also use data supplied in module control.



To make changes to the information listed on the screen, from the menu, select:



Collections ▶ Module Maintenance ▶ Module Control

Seq#	Description	Answer	Edit Button
5600	Header Information Line #1	Town of AdwLns	1 Edit
5601	Header Information Line #2		
5602	Header Information Line #3	219 Lewis kharf	
5603	Header Information Line #4	Boston, MA 02001	
5604	Header Information Line #5	617,494,5100	
5605	Header Information Line #6		
5606	Header Information Line #7		
5607	Header Information Line #8		
5608	Header Information Line #9		
5609	Header Information Line #10		
5610	Form 410 Information (Middle of Letter)	Town of AdwLns	
5613	Town Seal	D:\VAUC_Development\adw\home\auc\FORMS\Report	

Figure 10 Module Control Values used on the Statement

### 3.3 Select Parcels with Outstanding Balances

Run the **Select Parcels with Outstanding Balances** step; the system will present this prompt; enter a dollar amount to include parcels with balances over the entered amount. Enter .01 to capture all the parcels with outstanding balances in a work file.

Task 11423: Select Parcels with Outstanding Balances

Select Parcels with Outstanding Balances

Include Parcels with Balances over \$x (enter .01 for all)

Run as  Preview  Print  PDF  Excel

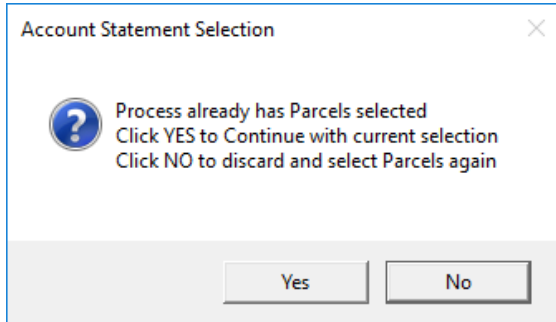
If Printing use Duplex  Yes  No

The edit list below will be displayed as part of the selection step.

Parcel	Location	Owner-at-Taking	Current-Owner	Original Taking-Date	Balance
127 0098-0083-0000	LEDYARD ST	SMITH MAURICE J JR	SMITH MAURICE J JR	7/2/2007	2,459.99
128 0098-0090-0000	FLORIDA ST	JONES GERALD R	ESTATE OF JONES GERALD R	12/1/1994	2,516.09
129 0098-0126-0000	93 SALISBURY ST	GOOFY, GREGORY R	GOOFY, GREGORY R	9/25/2019	26,819.61
130 0098-0135-0000	111 PULASKI BV	MICKEYMOUSE, STEVEN	MICKEYMOUSE, STEVEN	9/25/2019	5,019.55
131 0098-0156-0000	17 GABY LN	POPEYE REALTY TRUST	POPEYE REALTY TRUST	6/30/2017	30,624.56
132 0098-084+-0000	HUNT ST	SMITH MAURICE J JR	SMITH MAURICE J JR	7/2/2007	15,655.61
133 0098-085A-0000	HUNT ST	SMITH MAURICE J JR	SMITH MAURICE J JR	7/2/2007	2,407.64
134 0101-0002-0005	BOUND RD	DONALD DUCK, JUNIO R	ESTATE OF DONALD DUCK, JUNIOR	9/16/2013	377.90
	<b>Total # Parcels 132</b>		<b>Total Balance</b>		<b>1,011,965.70</b>
Selection Legend:					
Select Minimum Balance Amount: 100.00					
** Balance doesnt include any NEW INTEREST that might be calculated when statements are printed					



### 3.3.1 Rerun the Selection Step



Change the criteria for the minimum balance amount and run the step again; the system will display this message:

Click **[Yes]** – to continue with the **currently selected parcels (will not select anything new)**. No edit list will be produced, and the system will return to the steps menu.

Click **[No]** – to discard what is already selected and run the process again. A new edit list will be produced.

### 3.4 Edit Work File

The **Edit Work File** button displays the multi-record selection screen. Sort the data by clicking on any of the three column header buttons: **[5 Parcel]**, **[6 Location]**, or **[7 Current Owner]**. Select the parcels that will receive a statement here. Note that the **balance displayed does not include new interest**.

If most parcels **should** receive a statement, use the **[2 Select All]** button first and then deselect records by clicking the Sel box  to remove the checkmark for that record.

If most parcels **should not** receive a statement, click on **[3 Deselect All]** and then check  the boxes for the few that will receive a statement.

Additional information on a parcel is available via hover text on the Current Owner field.

When the selections are made, return to the steps menu using the **[1 Steps]** button.

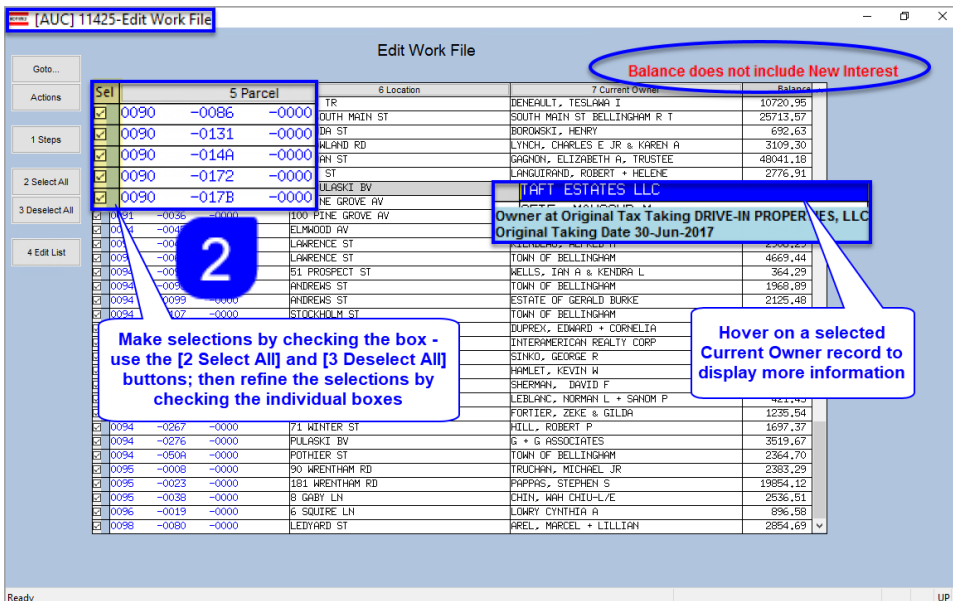


Figure 11 The Edit Work File screen with three sort options and hovertext on the owner





### 3.5 Edit List

This **Account Statement Edit List** is displayed as part of the selection and is also available from the edit work file screen and on the step menu. Run as Preview/Print/PDF® or in Excel® format. The edit list should be run after making any selections within the Edit Work File screen, to provide a list of the currently selected parcels to receive statements. This is a required step and must be run before the print step will become available

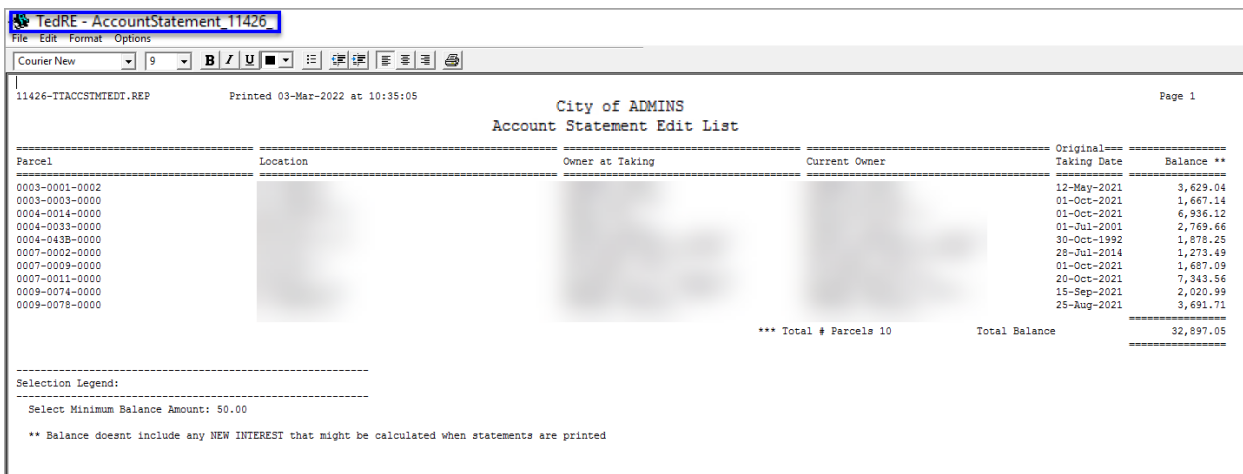
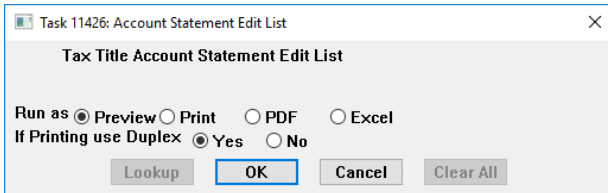
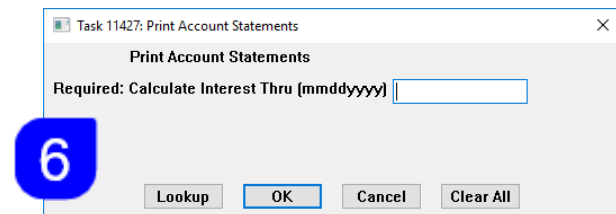


Figure 12 The edit list run as Preview (locations and names intentionally obscured)

### 3.6 Print Account Statements



The **Print Account Statements** step prompt requires entering an Interest Date in the format MMDDYYYY— new interest on balances will be calculated through to this date. If desired, select the date from the **[Lookup]**. This date will appear on the statement below the grid.

Statements can span over pages if the parcel’s original taking was many years ago. The grid below the “body” of the letter will show the Year of taking, the Bill #, the charge Category/Description, the Amount, any Abatements/Exemptions, Adjustments, Paid Amounts, Refunded Amounts, and a Balance.

If the charge is fully paid then it does not appear, only those transactions that have a balance will be shown. If there is a charge that is a credit - it will be included to show the correct balance

The numbers on the sample in section 3.6.1 correspond to the numbers in this document to show where the data on the form is coming from. Data not marked is hardcoded on the forms.



### 3.6.1 Sample Statement

Parcel: 0004 0014 0000 Page 1 of 1

Town of Admins  
219 Lewis Wharf  
Boston, MA 02001  
617.494.5100

KOSA REAL ESTATE LLC  
50 ADAMS ST  
MEDWAY CA 93921-7274

### TAX TITLE ACCOUNT STATEMENT

To Whom it May Concern:

This office wishes to inform you that your Real Estate account is in a "Tax Title" status, and a lien against your property has been recorded at the Norfolk County Registry of Deeds for unpaid Real Estate Tax Bills on 01-Oct-2021 for FY 2022 unpaid taxes. Subsequent outstanding tax years can be certified to the tax title account, year after year, if taxes are not satisfied in full. The Town will pursue all available remedies to seek payment if not paid in full in accordance with Massachusetts General Law.

The amount necessary to redeem the property known as PARCEL 0004 0014 0000 with an address of 462 HARTFORD AV in the Town of Admins is as follows:

Year	Bill#	Category/Description	Amount	Abate/Exm	Adjust	Paid	Refund	Balance	
2020	001035-00	Tax	6,815.12	0.00	0.00	0.00	0.00	6,815.12	
2020	001035-00	Advertising Fee	20.00	0.00	0.00	0.00	0.00	20.00	
2020	001035-00	Demand	5.00	0.00	0.00	0.00	0.00	5.00	
2020	001035-00	Advertising Prep Fee	10.00	0.00	0.00	0.00	0.00	10.00	
2020	001035-00	Instrument of Taking Pre	10.00	0.00	0.00	0.00	0.00	10.00	
2020	001035-00	Instrument of Taking Re:	76.00	0.00	0.00	0.00	0.00	76.00	
2020	001035-00	Tax Interest	547.29	0.00	0.00	0.00	0.00	547.29	
								<b>Balance Due</b>	6,936.12
								<b>New Interest</b>	547.29
								<b>Total Amount Due</b>	7,483.41

This calculation is through 30-Mar-2022.  
The per diem charge on this tax due is 3.04.

If your tax title account is in litigation, additional interest and fees may be owed, including redemption fees.

Page 1 of 1

1. These values are taken from module control as shown on Figure 10.
2. The parcel number is printed at the top of each page.
3. The address is for the current owner of the parcel
4. The "body" text as entered in Figure 9.
5. The "closing" text as entered in Figure 9.
6. The date as entered on the prompt for interest calculation.
7. New interest is calculated and added to the balance due to provide a total amount due.

The interest rate for the calculation is found on the Bill Type Table; Tax Title is type "70".

#### Collections ▶ Tables ▶ Bill Type

[AUC] 4005-Bill Type

Bill Type

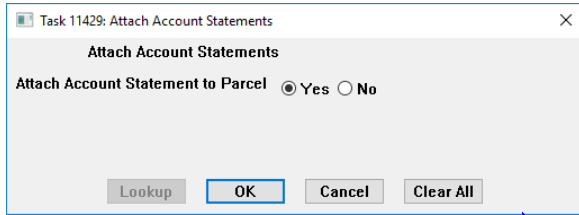
Year: 2022

Type	Description	Int Rate	Days in Yr	Min. Balance	Ovr Pay	Refund Int	Module	Avail	Util
10	Real Estate	.14	365,00		<input checked="" type="checkbox"/>		RE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15	Tax Deferral	.08	365,00		<input checked="" type="checkbox"/>		RE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
20	Motor Excise	.12	365,00		<input checked="" type="checkbox"/>		ME	<input checked="" type="checkbox"/>	<input type="checkbox"/>
30	Personal Property	.14	365,00		<input checked="" type="checkbox"/>		PP	<input checked="" type="checkbox"/>	<input type="checkbox"/>
40	Water Utility				<input type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>
50	Sewer Utility				<input type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>
60	Trash Utility				<input type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>
65	Stormwater Utility				<input type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>
70	Tax Title	.16	365,00		<input checked="" type="checkbox"/>		TT	<input checked="" type="checkbox"/>	<input type="checkbox"/>
80	Motor Excise				<input checked="" type="checkbox"/>		HR	<input type="checkbox"/>	<input type="checkbox"/>
90	Motor Excise				<input checked="" type="checkbox"/>		MB	<input type="checkbox"/>	<input type="checkbox"/>
91	Motor Excise				<input checked="" type="checkbox"/>		MB	<input type="checkbox"/>	<input type="checkbox"/>
95	Misc Billing				<input checked="" type="checkbox"/>		MB	<input checked="" type="checkbox"/>	<input type="checkbox"/>



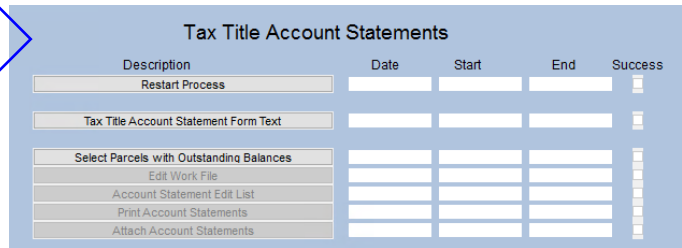
### 3.7 Attachment Step

The final step in the process, **Attach Account Statements** must be run; once this step is complete, the menu steps will be reset, and all work files will be removed. There is an option to **not attach** the account statements to the Tax Title parcel; click on the step to see this prompt.



The default the first time this step runs is  **Yes** which will attach the statement to the parcel in **The Tax Title Balance Inquiry** screen.

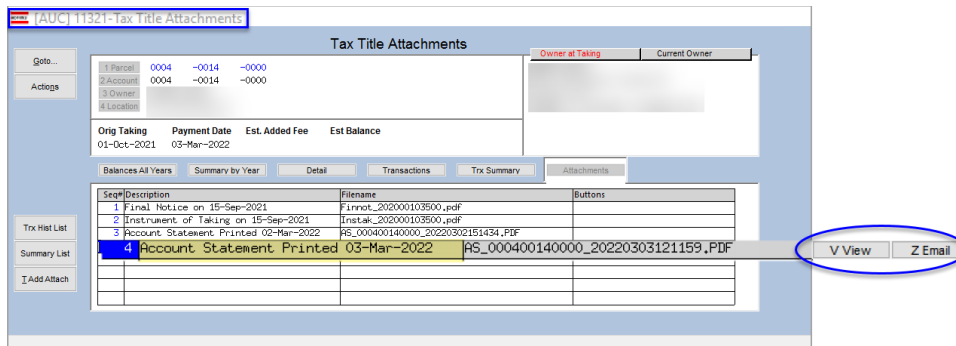
On completion of the steps, the menu will be reset and look like this:



#### 3.7.1 Select Yes to Attach

If  **Yes** is selected the first time the step is run, that will continue to be the default for the user running the step.

Collections ▶ Tax Title ▶ Tax Title Balance Inquiry ▶ [Attachments]

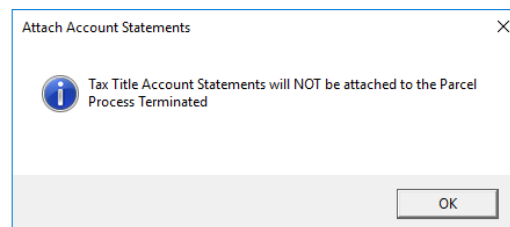
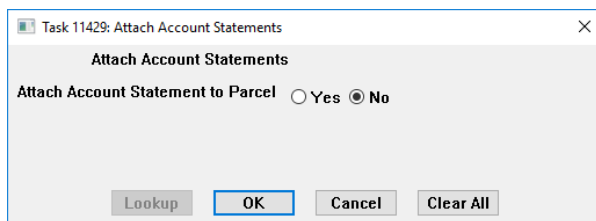


[V View] or [Z Email] the attachments from this screen.

Figure 13 Statements are available in the Tax Title Balance Inquiry Screen Attachments tab

#### 3.7.2 Select No to Attach

If  **No** is selected, the system will display this message, clear the steps screen, and remove all work files. This message will be displayed:





## 4 HELP REFERENCE LIBRARY

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

### 4.1 New or Updated Documents

- Tax Title RC-480 Tax Title Statements [New]