



Use this process to produce statements suitable for mailing in a window envelope to the current owners of a parcel in Tax Title. The process has a customizable letter, allows selecting from all parcels with outstanding balances, prints the statements, and optionally attaches a **PDF®** copy of each to the Tax Title parcel.

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1 TAX TITLE ACCOUNT STATEMENTS PROCESS

To begin, from the menu, select:

Collections ► Tax Title ► Tax Title Account Statements

Description	Date	Start	End	Success
Restart Process				
Tax Title Account Statement Form Text	02-Mar-2022	17:19:10,52	17:19:10,52	<input checked="" type="checkbox"/>
Select Parcels with Outstanding Balances	01-Mar-2022	12:43:07,45	12:43:11,45	<input checked="" type="checkbox"/>
Edit Work File	01-Mar-2022	15:51:34,93	15:51:35,21	<input checked="" type="checkbox"/>
Account Statement Edit List	01-Mar-2022	15:51:53,53	15:51:53,53	<input checked="" type="checkbox"/>
Print Account Statements	02-Mar-2022	09:31:25,15	09:31:32,12	<input checked="" type="checkbox"/>
Attach 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 independently.

1.1 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.

1.2 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 for 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:



Figure 1 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

System Module Control			
Seq#	Description	Answer	Edit Button
5600	Header Information Line #1	Town of Admins	1 Edit
5601	Header Information Line #2		
5602	Header Information Line #3	219 Lewis Wharf	
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 Admins	
5613	Town Seal	D:\AUC_Development\adm\home\auc\FORMS\Report	

Figure 2 Module Control Values used on the Statement

1.3 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 of 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.

AccountStatement_11426_LUANN[1].xml - Excel							
File Home Insert Page Layout Formulas Data Review View Tell me what you want to do... Theresa Campbell Share							
	A	B	C	D	E	F	G
1	Parcel	Location	Owner-at-Taking	Current-Owner	Original Taking-Date	Balance	Attorney Code
3	0003-0003-0000				10/1/2021	1,742.14	
4	0004-0014-0000				10/1/2021	14,749.19	
5	0004-0015-0000				7/18/2011	222.00	
6	0004-0033-0000				7/1/2001	2,769.66	
7	0004-043B-0000				10/30/1992	1,965.32	
12	0009-0078-0000				8/25/2021	3,691.71	
13	0009-0110-0000				9/15/2021	640.89	
14	0012-0019-0000				9/15/2021	805.71	CITY
15	0014-090A-0000				6/10/1998	3,831.23	
25	0029-287A-0000				9/15/2021	264.69	

Figure 3 Edit list run as Excel®


1.1.1 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.

1.4 Edit Work File

The  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.

[AUC] 11425-Edit Work File

Edit Work File

Balance does not include New Interest

Sel	5 Parcel			Location	7 Current Owner	Balance	Attorney
<input checked="" type="checkbox"/>	0003	-0003	-0000		ALGER, APRIL EVE	1742.14	
<input checked="" type="checkbox"/>	0004	-0014	-0000		KOSA REAL ESTATE LLC	14749.19	
<input checked="" type="checkbox"/>	0004	-0015	-0000		BARBARA L DICARLO LIVING TRUST	222.00	
<input checked="" type="checkbox"/>	0004	-0033	-0000		COMPTON, PAUL R	2769.66	
<input checked="" type="checkbox"/>	0004	-043B	-0000		HOLDEN, ALEXANDER B + HELEN B	1965.32	
<input type="checkbox"/>	0009	-0110	-0000	PEARL ST	FOUR NINETY FIVE ASSOCIATES	1448.49	
<input type="checkbox"/>	0012	-0019	-0000	129 FARM ST	BOHANNAN, MELVIN E + JEWEL G	2030.99	
<input type="checkbox"/>	0014	-090A	-0000	RAY AV		3691.71	
<input type="checkbox"/>	0018	-0056	-0000	6 ARROWHEAD RD		640.89	
<input type="checkbox"/>	0020	-0023	-0000	MAPLE ST		806.71	
<input type="checkbox"/>	0023	-0024	-0000	5 YVONNE RD		3831.23	
<input type="checkbox"/>	0023	-0631	-0000	12 HANSON ST		15875.86	
<input type="checkbox"/>	0028	-0018	-0000	23 HARTFORD AV	MONTENEGRO, RONELLE	1612.16	
<input type="checkbox"/>	0029	-0059	-0000	126 JEANNINE RD	QUERTIN, DONALD E + DEBRA A	4211.61	
<input type="checkbox"/>	0029	-0219	-0000	109 PATRICIA DR	MONTENEGRO, JOSE O	12575.86	
<input type="checkbox"/>	0029	-0249	-0000	60 WETHERSFIELD RD		10656.01	
<input type="checkbox"/>	0029	-0285	-0000	81 WETHERSFIELD RD		32898.21	
<input type="checkbox"/>	0029	-287A	-0000	4 WATER ST		251.64	

Owner at Original Tax Taking FALTER, ROBERT P & CAROLE H-LE
Original Taking Date 12-May-2021

PISELLI, JANIS B + JANELLE

A. PHILIP E
EPHEN W
TANCE M
ANA

JURENCE M + WENDY A
MELY TRUST
THUR F
R
RY

CITY

Attorney

Make selections - to send an account statement for the parcel, check the box. To exclude the parcel, clear the checkbox.

Hover on an owner to see more information

Attorney column will show the code if the account is in litigation and assigned to an attorney

Figure 4 The Edit Work File screen with three sort options and hovertext on the owner

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



1.5 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

Parcel	Location	Owner at Taking	Current Owner	Taking Date	Balance	Code
0003-0003-0000				08-Sep-2021	1,643.94	
0004-0014-0000				08-Sep-2021	21,326.20	
0004-0033-0000				01-Jul-2001	3,079.35	
0004-0037-0000				15-Jul-2022	1,772.19	
0004-0438-0000				30-Oct-1992	2,039.71	
0007-0002-0000				28-Jul-2014	1,612.83	LOCP
0007-0009-0000				15-Jul-2022	6,865.78	
0008-0002-0022				15-Jul-2022	1,765.86	
0008-0052-0000				15-Jul-2022	6,580.51	

Figure 5 The edit list run as Preview (locations and names intentionally obscured)

1.6 Print Account Statements

The **Print Account Statements** step prompt requires entering an Interest Date in the format MMDDYY– 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 1.1.2 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.



1.1.2 Sample Statement

2 Parcel: 0004 0014 0000

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Town of Admins
219 Lewis Wharf
Boston, MA 02001
617.494.5100

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

TAX TITLE ACCOUNT STATEMENT

To Whom it May Concern:

4 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 Rev	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
								Balance Due 6,936.12
								New Interest 547.29
								Total Amount Due 7,483.41

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

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

6

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1. These values are taken from module control as shown on Figure 2.

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 1.

5. The "closing" text as entered in Figure 1.

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				RE		
15	Tax Deferral	.08	365.00				RE		
20	Motor Excise	.12	365.00				ME		
30	Personal Property	.14	365.00				PP		
40	Water Utility								
50	Sewer Utility								
60	Trash Utility								
65	Stormwater Utility								
70	Tax Title	.16	365.00				TT		
90	Carousels						MB		
91	Toters						MB		
95	Misc Billing						MB		



1.7 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:

1.1.3 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 6 Statements are available in the Tax Title Balance Inquiry Screen Attachments tab

1.1.4 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:



2 Individual Tax Title Statements

Collections

- Payments >
- Adjustments >
- Refunds >
- Uncollectables >
- Treasury Receipts >
- Municipal Lien Certificates >
- Partial Payment Letters >
- Mortgage Lenders >
- Tax Title >**
 - Original Tax Taking
 - Subsequent Tax Taking
 - Reverse Tax Taking
 - Disclaim Tax Taking
 - Town Possession - Clear Tax Title Charge Balances
 - Tax Title Account Update
 - Tax Title Balance Inquiry**
- Deferrals >
- Reports >
- Tables >
- Queries >
- Module Maintenance >
- Interfaces/Imports >

With the June 2022 software update, the statement is now available for printing from the Tax Title Balance Inquiry screen for a specific parcel in Tax Title with a balance due.

Only parcels with a balance due will have the button available to produce a statement, as only records with a balance are shown on the statement.

Click the **[Acct Statement]** button to produce a statement for the current parcel.

The system will provide the option to attach a copy of the statement to the parcel, available for viewing or emailing from the **[Attachments]** tab.

Collections ▶ Tax Title ▶ Tax Title Balance Inquiry ▶ [Acct Statement]

Tax Title Balance Inquiry

Parcel: 0003 -0003 -0000
 Account: 0003 -0003 -0000
 Owner: IT Attorney

Orig Taking: 01-Oct-2021
 Payment Date: 07-Apr-2022
 Est. Added Fee: 1897.74
 Est. Balance: 1897.74

Buttons: Summary by Year, Detail, Transactions, Tax Summary, Attachments (11)

Buttons: Print Single Account Statement, Attach Account Statement to Parcel (Yes/No)

Buttons: Acct Statement (highlighted)

Parcel Total: 1773.14

Parcel: 0003 -0003 -0000

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 Town of Admins
 219 Lewis Wharf
 Boston, MA 02201
 617-454-5100

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 is 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 original bill year for this taking was 2020.

The amount necessary to redeem the property known as PARCEL with an address of in the Town of Admins is as follows:

Year	Bill #	Category/Description	Amount	Abatement	Amount	Penalty	Interest	Balance
2020	001007-00	Tax	1,391.14	0.00	0.00	0.00	0.00	1,391.14
2020	001007-00	Advertising Fee	20.00	0.00	0.00	0.00	0.00	20.00
2020	001007-00	Demolition	5.00	0.00	0.00	0.00	0.00	5.00
2020	001007-00	Advertising Prep Fee	10.00	0.00	0.00	0.00	0.00	10.00
2020	001007-00	Instrument of Taking Fee	10.00	0.00	0.00	0.00	0.00	10.00
2020	001007-00	Instrument of Taking Fee	76.00	0.00	0.00	0.00	0.00	76.00
2020	001007-00	Tax Interest	124.00	0.00	0.00	0.00	0.00	124.00
2020	001007-00	Legal Fees	106.00	0.00	0.00	0.00	0.00	106.00
2020	001007-00	Certificate of Redemption	106.00	0.00	0.00	0.00	0.00	106.00
								Balance Due 1,773.14
								New Interest 124.00
								Total Amount Due 1,897.14

This calculation is through 07-Apr-2022.
 The per dem charge on this tax due is 0.05.

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

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Tax Title Balance Inquiry

Parcel: 0003 -0003 -0002
 Account: 0003 -0003 -0002
 Owner: CITY
 Location: LAW OFFICES OF STEVE BOLTON

Orig Taking: 12-May-2021
 Payment Date: 07-Apr-2022
 Est. Added Fee: 4313.44
 Est. Balance: 4313.44

Buttons: Summary by Year, Detail, Transactions, Tax Summary, Attachments (0)

Buttons: Print Single Account Statement, Attach Account Statement to Parcel (Yes/No)

Buttons: Acct Statement (grayed out)

Parcel Total: 4313.44

No Balance Due

If there is no balance due, the Acct Statement button is grayed out