

# Chapter 1: Administrative Setup

## Overview

This chapter describes how to configure the forms and validation tables that are applicable to all the Mass Appraisal submodules. These include Land, Buildings, Miscellaneous Structures, Income, and Sales and Comparable Sales. *Refer to the specific reference guides for the setup required for each sub-module.*

An overview of the Mass Appraisal forms and validation tables for general settings follows:

### **Mass Appraisal General Parameters**

The *Mass Appraisal General Parameters* form has multiple pages of options for configuring the CAMA modules. They include general parameters, land, building, sales, income, and miscellaneous structures. The general parameters that are applicable to all modules are described in this guide. See *Mass Appraisal General Parameters* on page 7.

*For details on the specific parameters, refer to the specific CAMA guides.*

### **Lookup Group Type**

In Govern OpenForms, version 6.1, you can set up your Mass Appraisal validation codes based on a combination of jurisdictions, neighborhoods, income neighborhoods, and property types. This means that you can create different rates for different property types within specified jurisdictions and neighborhoods or for any one of the allowed combinations. See *Lookup Group Type* on page 23.

### **Mass Appraisal Validation Tables and Codes**

The Mass Appraisal module includes multiple types of validation tables for storing user-defined codes and descriptions and for verifying that data entries are valid. The validation codes are used in determining rates and values. See *About Govern CAMA Validation Tables and Codes* on page 34.

**Mass Appraisal Validation Tables by Category:** This section provides a list of all the Mass Appraisal Validation Table Types, by category, with the tables in which they are referenced. See *Mass Appraisal Table Types by Category* on page 35.

**Command Buttons:** This section describes the command buttons common to all the Mass Appraisal validation tables and codes. See *Common Menu Items and Processes* on page 2.

**Depreciation:** Use the *Mass Appraisal Depreciation Validation Tables and Codes* to set up depreciation percentages to apply to building structural elements and miscellaneous structures. Depreciation Tables are a prerequisite for the *Building Use Code* and *Miscellaneous Structures Codes (MUSE)* validation tables. See *Depreciation Validation Tables* on page 67.

**Correlated Values Distribution:** Use the *Correlated Values Distribution* table to set up values for CAMA, Comparable Sales, Income (DIR) and Income (GRM) if you are using the Correlated Values method. See *Correlated Values Distribution Validation Table* on page 75.

**Neighborhood:** Use the *Neighborhood* validation table to set up neighborhood adjustments for building, miscellaneous structures, and land records. See *Neighborhood Validation Table* on page 80.

**Rounding:** Use the *Mass Appraisal Rounding* validation table to define rounding of selected mass appraisal values, such as Building Value, Land Value, and Comparable Value. You can define a different formula, logical expression, or value to round to, 10, 100, etc. for each. See *Rounding Validation Table* on page 92.

**Site:** Use the *Mass Appraisal Sites* validation tables to set up adjustments according to geographic information, such as proximity to heavy or light traffic, green spaces, or schools. You can apply as many site adjustments as required to a record and even create multiple site adjustments records for each property. Site Adjustments are defined by Land, Miscellaneous, Income, Buildings, or on All values. An add, subtract, divide or multiply operator for the adjustment can be associated with each table. See *Mass Appraisal Sites Validation Table* on page 97.

**Limited Assessment:** The *Limited Assessment* Mass Appraisal validation table type is used for defining *Capped Values*. In a year in which property values increase by significant amounts, you can use capped values to prevent an abrupt increase in property taxes. Capped values create an upper limit for property assessments. See *Limited Assessment Validation Table* on page 104.

**Mass Appraisal Validation Tables with Security Setup:** You can grant or remove user permissions on each Mass Appraisal validation table in Govern Admin. You can also *See on page 110.*

### **Appraiser's Name and Address Records**

Use the *Appraiser's Name* form to create name and identification records for each appraiser. *See Appraiser's Name on page 80.*

### **Appraisal Report Fields**

Use the *Appraisal Reports Fields* screen to associate *Govern* fields to fields in the *Uniform Residential Appraisal Report (URAR)*. *See Multiple Assessment Rates on page 111.*

### **Multiple Assessment Rates**

The Multiple Assessment Rate form is used for setting up varying tax rates according to property type. These values are transferred to the Tax Assessment and Billing subsystem. *See Multiple Assessment Rates on page 111.*

# Mass Appraisal General Parameters

## Overview

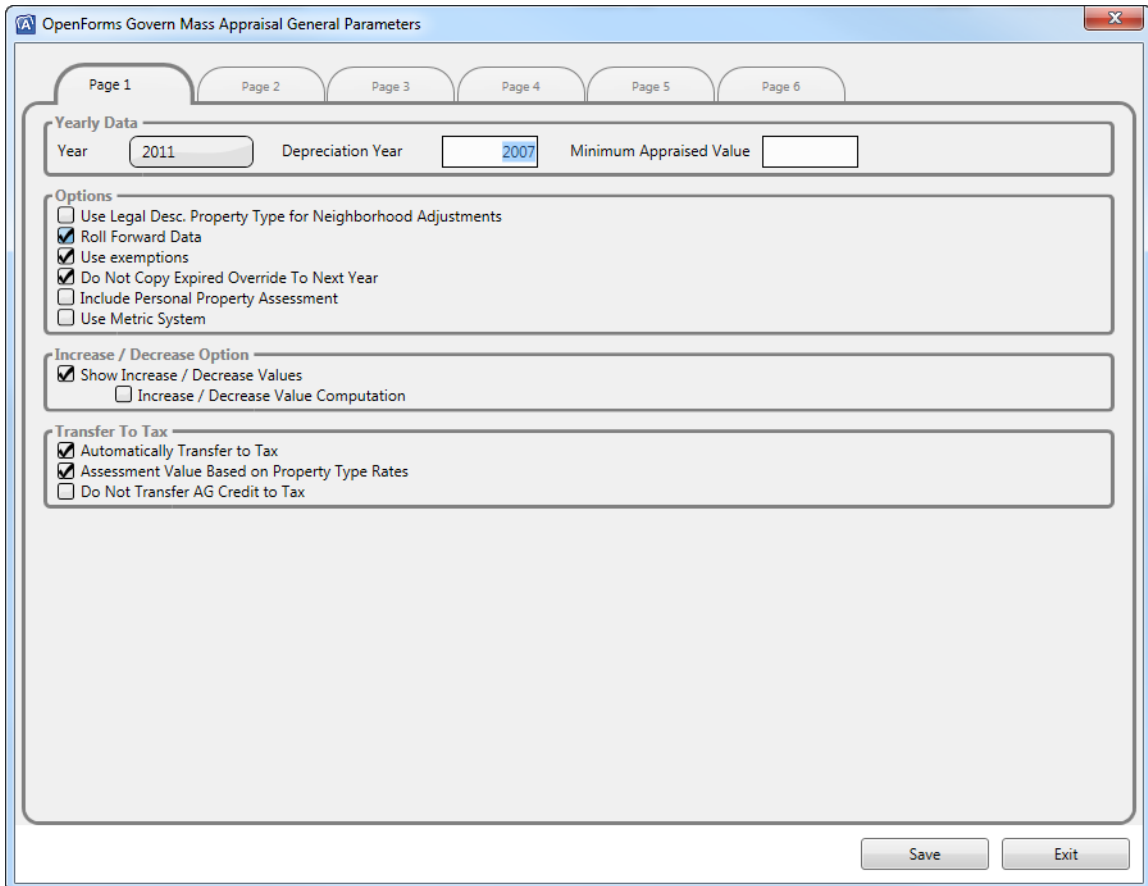
The Mass Appraisal General Parameters form contains parameters and options for configuring the Govern OpenForms Mass Appraisal system. These are divided across the following tabs:

- **Page 1:** Yearly Data, General Options, Increase / Decrease, and Transfer to Tax
- **Page 2:** Building, Income, and Land
- **Page 3:** Comparable Sales
- **Pages 4 and 5:** Buildings
- **Page 6:** Marshall & Swift

To access the Mass Appraisal General Parameters form:

1. Launch GNA.
2. Select **Application Configurations > Mass Appraisal > General Parameters**.

## Page 1 Parameters



The screenshot shows a software window titled "OpenForms Govern Mass Appraisal General Parameters". It has a tabbed interface with tabs for "Page 1", "Page 2", "Page 3", "Page 4", "Page 5", and "Page 6". The "Page 1" tab is active. The form is divided into several sections:

- Yearly Data:** Contains three input fields: "Year" (set to 2011), "Depreciation Year" (set to 2007), and "Minimum Appraised Value" (empty).
- Options:** A list of checkboxes:
  - ☐ Use Legal Desc. Property Type for Neighborhood Adjustments
  - ☒ Roll Forward Data
  - ☒ Use exemptions
  - ☒ Do Not Copy Expired Override To Next Year
  - ☐ Include Personal Property Assessment
  - ☐ Use Metric System
- Increase / Decrease Option:** Contains two checkboxes:
  - ☒ Show Increase / Decrease Values
  - ☐ Increase / Decrease Value Computation
- Transfer To Tax:** Contains three checkboxes:
  - ☒ Automatically Transfer to Tax
  - ☒ Assessment Value Based on Property Type Rates
  - ☐ Do Not Transfer AG Credit to Tax

At the bottom right of the window are "Save" and "Exit" buttons.

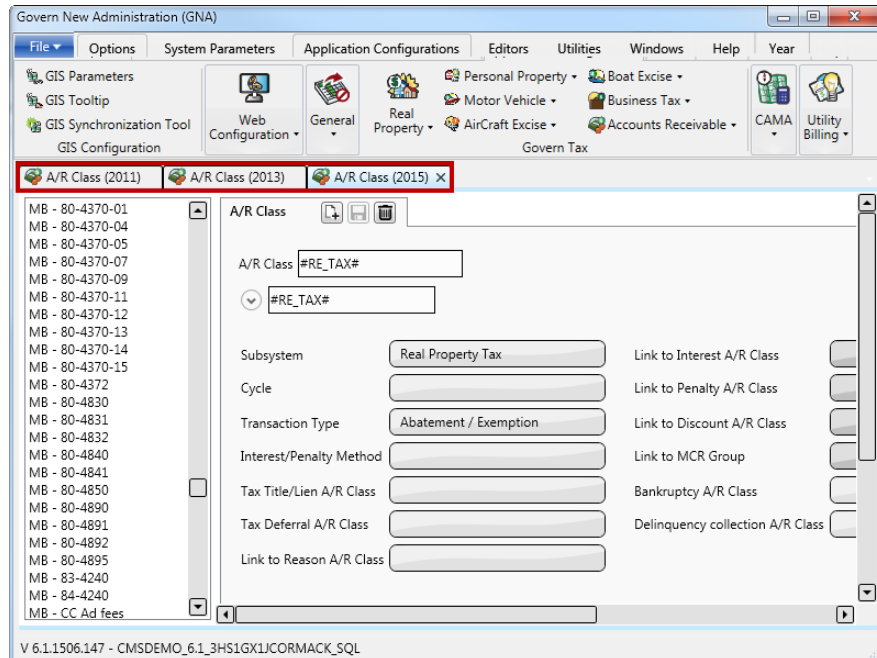
### Yearly Data

**Year:** CAMA parameters are saved by year. Select the year that you want to view or modify from the **Year** drop-down list.

When you open the MA General Parameters form, the year is automatically set to the current year for GNA. You can select a different year in order to view or modify parameters for that year. This is a requirement for appraisers who are working in multiple years at the same time.

Because the MA General Parameters form is opened in a separate window, you cannot view multiple versions of this form in multiple years at the same time. This is different from other forms that contain data saved by year. For

these forms, you can open multiple versions at the same time. For example, the following screen shot shows multiple version of the A/R Class Codes form.



**Depreciation Year:** The Depreciation Year is used in calculating the depreciation of building structural elements and miscellaneous structures. The calculation is based on a table of percentages defined by the number of years that have lapsed. This is calculated by subtracting the actual or effective year the structure or element was built from the Depreciation Year. *Refer to the Mass Appraisal Buildings and Miscellaneous Structures guides for further details.*

The Depreciation Year can be the calendar year or any year from which you want to set up depreciation percentages.

**Minimum Appraised Value:** Enter a minimum appraised value for a property. The definition of Appraised Value depends on the Method in Use. This is selected on the Mass Appraisal Property Information form in Govern. *See Mass Appraisal Property Information on page 103.*

## Options

### Use Legal Description Property Type for Neighborhood

**Adjustments:** Define this parameter according to how you want to set up neighborhood adjustments. The Neighborhood Adjustment applies to the

## CAMA General Information

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building, miscellaneous structure, and land values. It is displayed on the following forms:

- CAMA Building Structural Elements and Features (BSE)
- Miscellaneous Structures
- Land Information

It can be based on a Property Type, such as residential, commercial, or industrial. The Property Types are defined in the user validation table VT\_USR\_PROPTYPE. They are associated with neighborhoods through the Mass Appraisal Neighborhood Validation Table. They are associated with appraisal values through the following Mass Appraisal Validation Tables:

- Building Use Code
- Miscellaneous Structure Code (MUSE)
- Land Use Codes

A Property Type is selected for the parcel on the *Legal Information* form in Govern.

The Neighborhood Adjustment is applied to a Property Type if all the following conditions are met:

- The Neighborhood Validation Codes are set up by Property Type
- The Mass Appraisal Land Use, Building Use, or Miscellaneous Structures Use Code is set up by Property Type
- Use Legal Description Property Type for Neighborhood Adjustments is selected on the *Mass Appraisal General Parameters* form.

Otherwise, the Neighborhood Adjustment is not applied by Property Type.

**Frozen Records:** When you create an *MA - Sales Information* or *MA - Audit Information* record, a frozen record is automatically created. When a record is frozen, a copy of all the active CAMA records for the property are saved and assigned a Frozen ID. You can view the land, sales, income, building, and miscellaneous structures records, for the property at the moment the record was frozen. This is similar to having a series of snapshots of the property record.

You can continue to make changes to the property record after it is frozen. You can even have multiple frozen records for a property. Each time a record is frozen, a new frozen ID is assigned.

The current record is assigned the Frozen ID 0. Frozen IDs are updated differently according to whether the record is frozen from the *Sales* or from the

*Audit* form. Sales information records have positive frozen IDs. The records frozen from the *Audit* form have negative frozen IDs in past years. A new Frozen ID is automatically assigned each time a record is frozen.

### **Records Frozen From MA\_Audit**

When you select the **Value Finalized** option on the *MA - Audit* form, a frozen record is automatically created. The first time the record is frozen, it is assigned Frozen ID -2. The next time, it is assigned Frozen ID -3, and so on.

Users can view frozen records by selecting the applicable year and Frozen ID in the History Panel, provided they have the required access permissions. Records from all Mass Appraisal forms can be viewed.

Access rights are required for viewing and modifying frozen records. These are defined in the OFD by selecting the **Alternate type** and then setting rights for the required Profile, Roles and Users. *Refer to the Govern OpenForms Designer Guide (OFD) for details.*

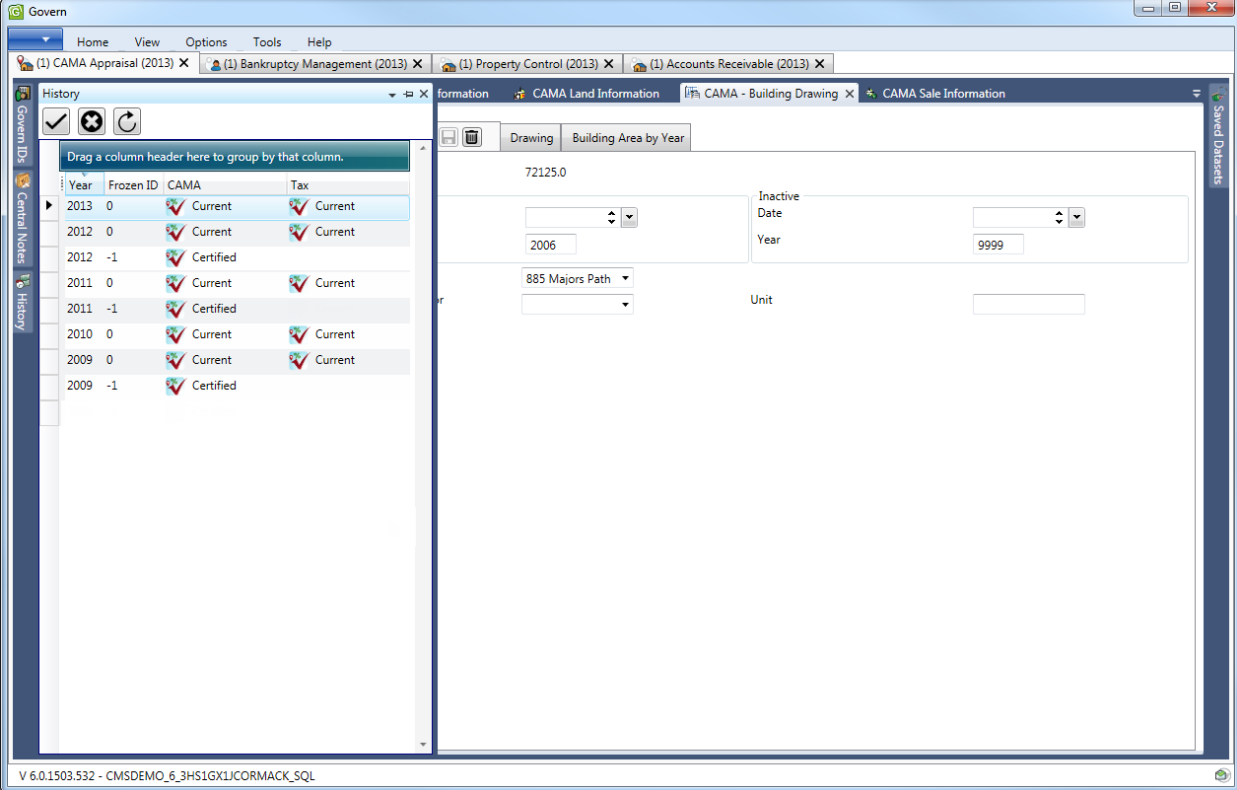
You can open all the forms listed under *Forms with Frozen IDs on page 15* and view the data as they were at the time the record was frozen. For example, you could be updating a property and have open Fiscal Year 2015 with Frozen ID 0, but need to see the land record for 2013, Frozen ID -2.

To view records in past or future years:

1. Launch Govern.
2. Open a Profile that contains CAMA.
3. Open the required form.
4. Perform a search and load the required record to the form.
5. Select the History panel.



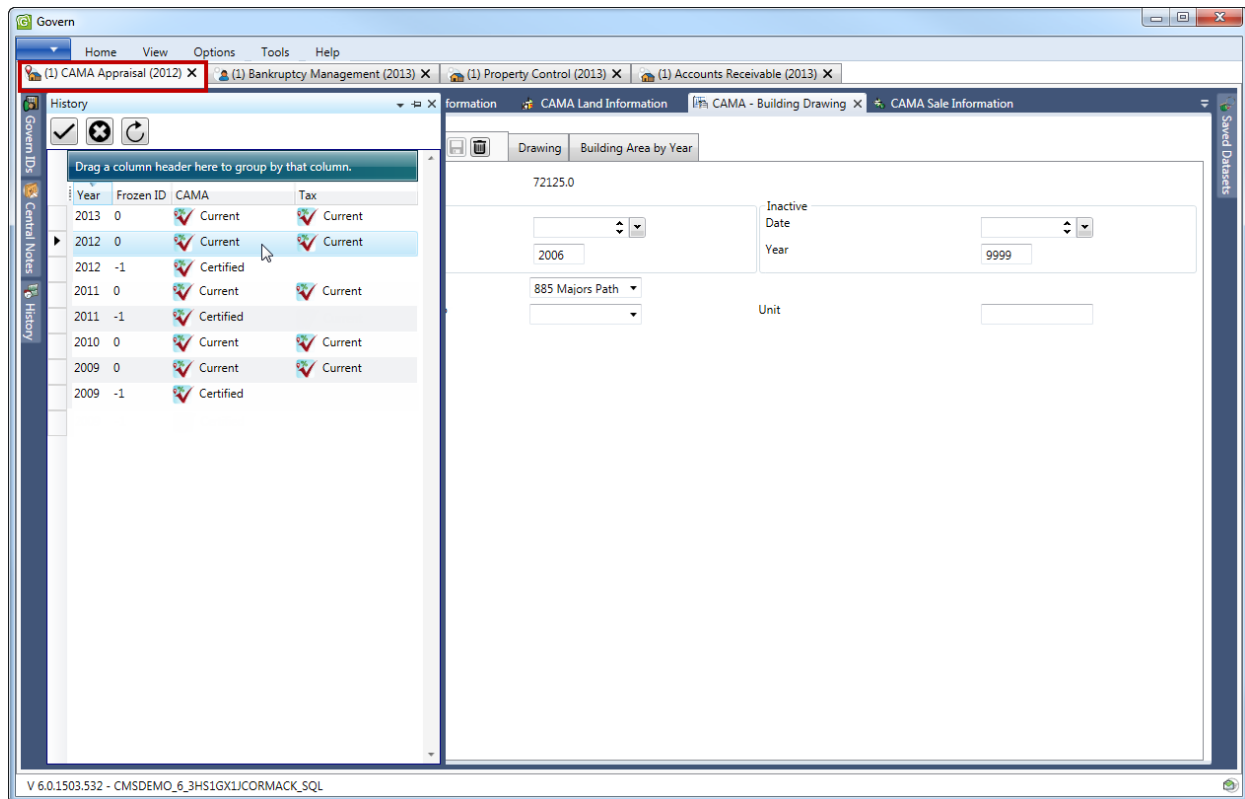
## CAMA General Information



The screenshot shows the Govern software interface. The main window is titled 'Govern' and has a menu bar with 'Home', 'View', 'Options', 'Tools', and 'Help'. Below the menu bar is a toolbar with icons for 'Home', 'View', 'Options', 'Tools', and 'Help'. The main area is divided into a left pane and a right pane. The left pane has a 'History' tab and a 'Drawing' tab. The History tab shows a table of data with columns 'Year', 'Frozen ID', 'CAMA', and 'Tax'. The Drawing tab shows a form with fields for 'Inactive Date', 'Year', and 'Unit'. The status bar at the bottom indicates 'V 6.0.1503.532 - CMSDEMO\_6\_3HS1GX1JCORMACK\_SQL'.

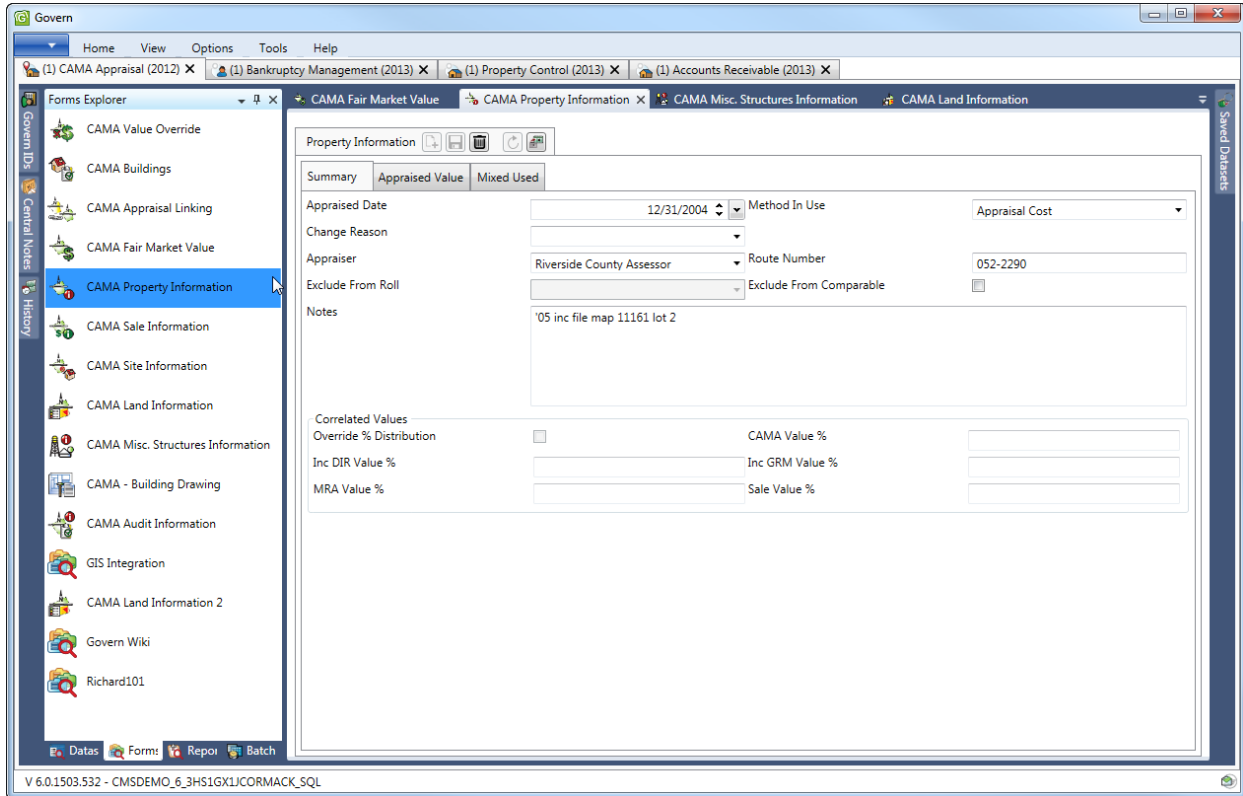
Year	Frozen ID	CAMA	Tax
2013	0	Current	Current
2012	0	Current	Current
2012	-1	Certified	
2011	0	Current	Current
2011	-1	Certified	
2010	0	Current	Current
2009	0	Current	Current
2009	-1	Certified	

6. Double-click on the entry for the year and the Frozen ID you want to view.



7. Open the Forms Explorer and open forms that you want to view.

# CAMA General Information



The screenshot displays the Govern software interface. The top menu bar includes Home, View, Options, Tools, and Help. Below the menu, there are several open tabs: (1) CAMA Appraisal (2012), (1) Bankruptcy Management (2013), (1) Property Control (2013), and (1) Accounts Receivable (2013). The left sidebar, titled 'Forms Explorer', lists various forms: CAMA Value Override, CAMA Buildings, CAMA Appraisal Linking, CAMA Fair Market Value, CAMA Property Information (highlighted), CAMA Sale Information, CAMA Site Information, CAMA Land Information, CAMA Misc. Structures Information, CAMA - Building Drawing, CAMA Audit Information, GIS Integration, CAMA Land Information 2, Govern Wiki, and Richard101. The main window shows the 'CAMA Property Information' form. It has a 'Property Information' tab selected, with sub-tabs for Summary, Appraised Value, and Mixed Used. The form contains several fields: Appraised Date (12/31/2004), Method In Use (Appraisal Cost), Change Reason, Appraiser (Riverside County Assessor), Route Number (052-2290), Exclude From Roll, Exclude From Comparable, and Notes ('05 inc file map 11161 lot 2'). At the bottom, there are sections for Correlated Values, Override % Distribution, Inc DIR Value %, MRA Value %, CAMA Value %, Inc GRM Value %, and Sale Value %.

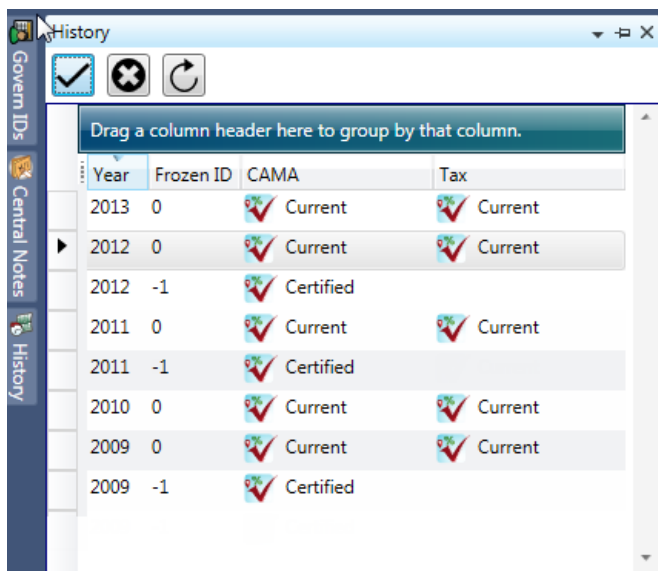
8. Open the History Panel again if you want to return to the year and Frozen ID that you had originally opened.

## Closed Year / Certified Records

The Frozen ID -1 is a copy of the current or Frozen ID 0 record. It is created at the following times in order to preserve a copy of the original data:

- When you run the CAMA Close Year batch process
- When you create a Value Finalized MA - Audit record

This record is identified as Certified in the database and on the History Panel:



Year	Frozen ID	CAMA	Tax
2013	0	Current	Current
2012	0	Current	Current
2012	-1	Certified	
2011	0	Current	Current
2011	-1	Certified	
2010	0	Current	Current
2009	0	Current	Current
2009	-1	Certified	

If the **History for Current Year** option is selected in Govern Admin, When you set an *MA - Audit Information* record to Value Finalized, Frozen IDs -1 and -2 are created at the same time.

If the **History for Current Year** option is deselected, Frozen IDs are not created in the current year.

### Records Frozen From MA - Sales Information

When you create a sales record, from *MA - Sales Information*, a Frozen ID is automatically assigned. For sales records, Frozen IDs start at 1. They increase by 1 each time a sales record is created within the year. For example, if a property sells four times in a year, you would have four Frozen ID records, 1, 2, 3, and 4.

Frozen records are not created for the Sales Information or Audit Information forms. You cannot open the MA- Audit form as it existed in 2011 when the Sales Information was created and Frozen ID 1 was assigned.

### Forms with Frozen IDs

When you create an *MA - Sales Information* record or set an *MA - Audit Information* record to Value Finalized, frozen records are automatically created for the following forms:

- CAMA - Property Information
- CAMA - Building Information

## CAMA General Information

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- CAMA - Building Structural Elements
- CAMA - Building Drawing or Drawing APEX
- CAMA - Building Area
- CAMA - Land Information
- CAMA - Income
- CAMA - Miscellaneous Structures
- CAMA - MRA
- CAMA - Sites
- CAMA - Values Override
- Property Control Property Area
- Property Control Legal Information

### Summary

The following table lists the assigned IDs that appear in the Frozen ID field on the History Panel and on the Govern Ribbon. Note that this text box is used for Split Merge data as well as Frozen IDs:

Record Status	Frozen and Other Assigned IDs
Current Record	0
Frozen from MA - Sales Information	1, 2, 3, 4...
Closed Year / Certified Record	-1
Frozen from MA - Audit	-2, -3, -4, -5...
Split Merged Data	-32,766

### Notes on Frozen Records

You cannot view the *Sales Information* record at the time a frozen record was created from the Audit form and vice versa, you cannot view the Audit Information record at the time the *Sales Information* record was created. Frozen records are not created for these forms when a *Sales Information* or *Audit Information* record is created or finalized.

A Frozen ID -1 record is not created if there is an open Split Merge record for the property for the year. No message is displayed.

### Security for Frozen Records

The Alternate Security applies to Frozen Records. Users have access to view, update and delete frozen records according to the alternate security rights

assigned for the form. *For details about alternate security, refer to the Govern Security Manager guide.*

You cannot change values saved under a Frozen ID, unless you have Super User rights or full access rights to the historical records. A new Frozen ID is automatically assigned each time a record is frozen.

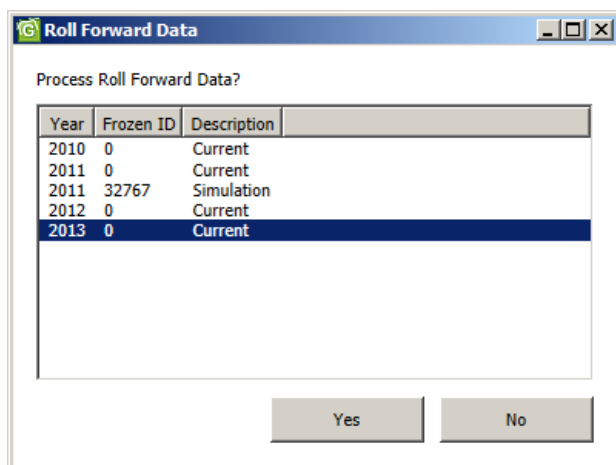
### Roll Forward Data

**Roll Forward Data:** Select the **Roll Forward Data** option if you make modifications to records in earlier years that you want to carry forward to records in the future years that are open.

When making property appraisals you may need to have open the current fiscal year and several years in the future. For example, if the current fiscal year is 2015, you may have open 2016, 2017, and 2018. The configuration parameters and property records from 2015 are copied to the future years, 2016, 2017, and 2018.

If there is a change made in 2015, such as an extension to a porch, you can update the record for the year in which the change occurred and then roll the change forward to the future years, without having to open and modify each record. The changed field is copied from the current year to the future years. Structures that have not changed are not rolled forward.

In the following screen shot, the current year is 2013. The user returns to 2010 and changes a record. A confirmation message, similar to the following, appears each time you save a new record or modify an existing one when there are records for future or more recent years.



## CAMA General Information

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The message displays the records that are updated. This includes the current record.

When the confirmation record appears, do one of the following:

- Select **Update Sales Data** and click **Yes** to update the sales records along with the current modification.  
This updates the sales records for all Frozen IDs for the property in the same year, regardless of whether the change was made before or after the property was sold.
- Click **Yes** to roll the current modification forward.  
Newly created records, deleted records, and modified records are rolled forward.
- Click **No** if you do not want to roll the current modification forward.

**Note:** The data are rolled forward if the CAMA Property Information record exists for the current parcel.

Typically, this record would be created when you open the new year. However, if it were deleted, the Roll Forward would not occur.

Data in the following Govern tables are rolled forward:

Govern Forms	Govern Tables
Property Area	PC_AREA
Legal Information	PC_LEGAL_INFO
Tax Real Estate Assessment	TX_RE_ASSESSMENT
Tax Assessment	AC_, BT_, PP_, MV_, RE_ASSESSMENT
Tax Exemptions	TX_EXEMPTIONS
Tax Levy Master	TX_LEVY_MASTER
Appraisal Property Information Appraisal data	MA_MASTER
Building Drawing	MA_DRAWING
Building Area	MA_BLDG_AREA
Building Structural Elements	MA_BUILDINGS, MA_BUILDINGS_2, MA_BUILDINGS_3, etc.

<b>Govern Forms</b>	<b>Govern Tables</b>
Income	MA_INCOME
Land	MA_LAND
MRA	MA_MRA
Site Information	MA_SITE
Miscellaneous Structures	MA_MISC_STRUCTURES

**Use Exemptions:** You can apply real property tax exemptions directly to the land, building, miscellaneous structures, and income data records. This is useful when an exemption is applicable to a specific mass appraisal value rather than to the entire property.

Select the **Use Exemptions** option to add the *Exemptions* divider to the *MA Land Information*, *MA Building Structural Elements*, *MA Miscellaneous Structures*, and *Income Data* forms. You can then apply a full or partial exemption to any of these records. Refer to the specific Mass Appraisal guides for details.

**Do Not Copy Expired Overrides to Next Year:** Select this option if you do not want to copy the expired override values over to the next year, when you copy the default parameters.

**Include Personal Property Assessment:** Select this option to include personal property assessment data in the Mass Appraisal calculation. If this option is selected the values from the Personal Property adjustment tables are transferred to the MA\_MASTER table.

To calculate the Personal Property Assessment, run the *Appraised Value Computation* process in Govern Batch Processing. Select **Fast Compute Mass Appraisal Values**. Then select **Personal Property** and click **Process**. See *Appraised Value Computation* on page 134 for details.

## **Increase / Decrease Option**

**Show Increase / Decrease Values:** Select this option to display the **Equalization Increase / Decrease**, and when available, **Physical Increase / Decrease** values. See *Increase / Decrease* on page 109 for details.

**Increase / Decrease Value Computation:** If this option is selected, the Increase/Decrease value is calculated during the final year computation, and



## CAMA General Information

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displays the information on the *Values* tab of the *Property Information (Mass Appraisal)* function form in Govern for Windows. The information is displayed in the **Equalization Increase**, **Equalization Decrease**, **Physical Increase** and **Physical Decrease** parameters. See *Increase / Decrease* on page 109 for details.

### Transfer to Tax

Use the following options to set up the automatic transfer of Mass Appraisal values to the Real Property Tax Assessment subsystem.

**Automatically Transfer to Tax:** Select this option to transfer CAMA values to the tax module, automatically, when the MA - Audit Information record is saved finalized. Otherwise, if this option is deselected, values are transferred during the *Mass Appraisal Values Computation* batch process.

**Assessment Value Based on Property Type Rates:** Select this option to transfer appraised values at different rates, according to property type. Then, set the amounts to transfer using the Multiple Assessment Rates form. See *Multiple Assessment Rates* on page 111 for details.

**Assessment Equalization %:** Enter the percentage of the total appraisal value to transfer to the *Real Property Tax* sub-system.

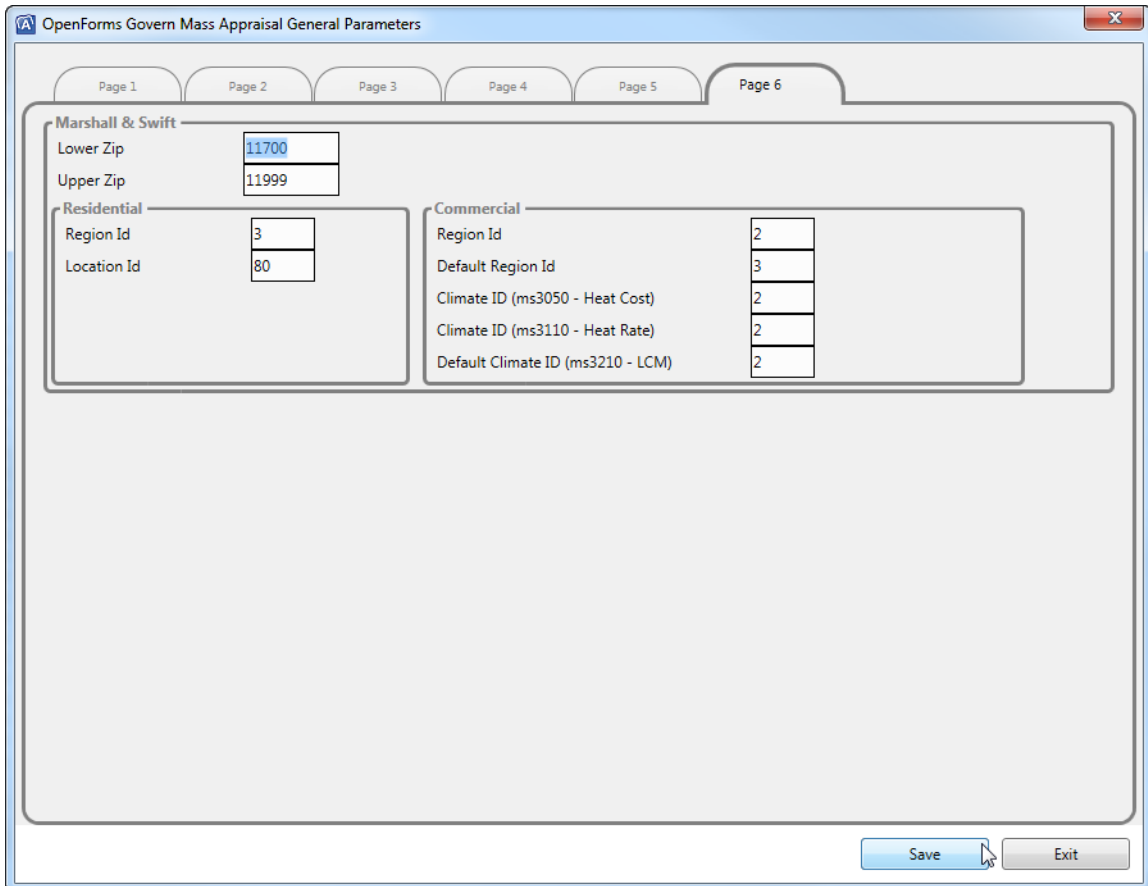
**Note:** This option is available if the **Assessment Value Based on Property Type** option is deselected

**Do Not Transfer AG Credit to Tax:** Select this option if you are not transferring the agricultural value to the tax sub-system with the other Mass Appraisal values. Refer to the user section of the *Mass Appraisal Land guide* for further details on the agricultural value.

## Page 2 to 5 Parameters

Parameters found on the Mass Appraisal General Parameters Pages 2 through 5 are used for Building, Land, Income, and Comparable Sales data. Refer to the specific guides for details about completing these parameters.

## Page 6 Parameters



OpenForms Govern Mass Appraisal General Parameters

Page 1 Page 2 Page 3 Page 4 Page 5 **Page 6**

**Marshall & Swift**

Lower Zip

Upper Zip

**Residential**

Region Id

Location Id

**Commercial**

Region Id

Default Region Id

Climate ID (ms3050 - Heat Cost)

Climate ID (ms3110 - Heat Rate)

Default Climate ID (ms3210 - LCM)

**Save** **Exit**

The Page 6 parameters are required for Marshall & Swift data. Refer to the Marshall & Swift documentation for guidelines on completing these parameters.

**Note:** Complete these parameters before running the Govern Batch Processes to export and import Marshall and Swift data. See *Importing Marshall & Swift Data on page 174*.