

Mass Appraisal Audit Pending

Overview

The *Mass Appraisal Audit Pending* batch process automatically generates new MA Audit Information records in Govern OpenForms. While these records can be created manually, running the batch process can save time and increase the accuracy of the records

Records can be created for a:

- Saved dataset
- Jurisdiction and neighborhood
- Range of tax map numbers

The MA Audit Pending updates the following fields on the MA Audit Information form. Once the batch process is complete:

- The **Status** field is set to **Pending**.
- The Frozen **ID** is set to **0**.

The following fields are updated as selected on the batch process form.

- **Audit Reason Code**: This is a required field.
- **Appraiser**
- **Entry Date**: This is a required field.
- **Entry Code**
- **Activity Code**: This is a required field.
- **Source Code**

You can select parcels from the batch process by jurisdiction or neighborhood within a range of tax map numbers, or in a saved dataset. Alternatively, you can create audit records for all parcels. The fiscal year is required.

The MA Audit Records are the same as those created manually. They can be modified or deleted, as any other record.

Prerequisites

Saved Dataset

You can run the batch process on a saved dataset. Ensure that one is created beforehand.

Tables

The following tables are required for the Mass Appraisal Audit Pending batch process:

- **MA_APPRAISERS:** This table lists the appraisers that can be selected for the audit.
- **NA_NAMES:** This table lists all the name and address accounts in the deployment.
- **VT_USER.MAENTRY:** This table lists the entry code that can be associated with an audit.
- **VT_USER.MAINFSRC:** This table lists the source codes associated with the Mass Appraisal audit.
- **VT_USER.MAACTV:** This table lists the activity codes associated with the audit.
- **VT_USER.MA_AUDIT_REASON:** This table lists the reasons for conducting the audit.
- **VT_USER.MA_AUDIT_STATUS:** This table contains two values: Pending and Finalized.

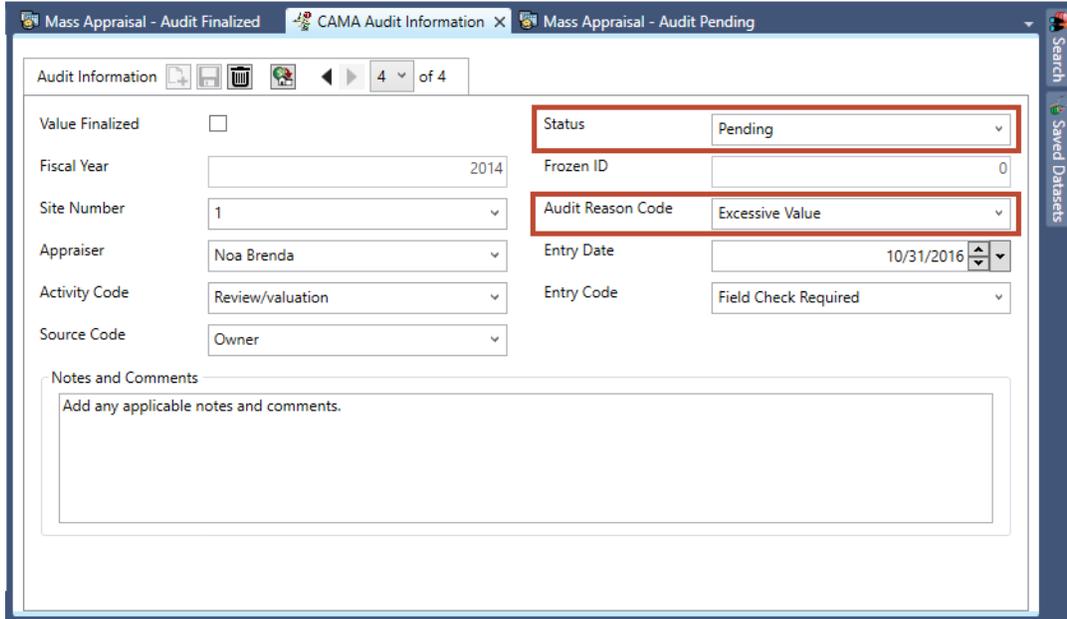
Related Forms

The Mass Appraisal Audit Information form is updated by the Mass Appraisal Audit Pending batch process. The Mass Appraisal Audit Finalized batch process can be run to create finalized MA Audit Information records from pending ones.

MA Audit Information User Form

The following new fields are now included in the MA Audit Information form. These are required for the MA Audit Pending and MA Audit Finalized batch processes.

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The screenshot shows a web application window titled "CAMA Audit Information" with several tabs: "Mass Appraisal - Audit Finalized", "CAMA Audit Information", and "Mass Appraisal - Audit Pending". The main form area is titled "Audit Information" and contains the following fields:

- Value Finalized:
- Fiscal Year: 2014
- Site Number: 1
- Appraiser: Noa Brenda
- Activity Code: Review/valuation
- Source Code: Owner
- Status: Pending
- Frozen ID: 0
- Audit Reason Code: Excessive Value
- Entry Date: 10/31/2016
- Entry Code: Field Check Required

Below the form fields is a "Notes and Comments" section with a text area containing the placeholder text "Add any applicable notes and comments." The right sidebar of the application includes "Search" and "Saved Datasets" buttons.

Status: The **Status** field is automatically set to **Pending** when you run the MA Audit Pending batch process. In this state the form can be modified or even deleted. An appraiser can update the status field to **Finalized**. The MA Audit Finalized batch process selects the **Finalized** flag. At this point, the record can no longer be modified.

Audit Reason Code: The Audit Reason Code contains user defined values from the VT_USER.MA_AUDIT_REASON table. When you run the MA Audit Pending batch process, you must select a reason code. This can be modified after the process is complete.

Related Batch Processes

The MA Audit Finalized Batch Process is similar to the MA Audit Pending batch process. It generates finalized Mass Appraisal Audit Information records for existing MA Audit Information records with the **Status** set to **Finalized**. The MA Audit Finalized batch process selects the **Finalized** option and updates the Entry Code as set on the batch process. The finalized Audit Information records cannot be deleted, except by a user with authorized permissions.

Business Rules for the MA Audit Pending Batch Process

The MA Audit Pending batch process creates new MA Audit Information records for all Mass Appraisal records that:

- Match the Selection Criteria
- Do not have a current MA Audit Information recording with Frozen ID 0
- Are in the Fiscal Year selected

Creating Mass Appraisal Audits

You can use the Mass Appraisal Pending and Mass Appraisal Finalized batch processes, as follows, in order to facilitate the Mass Appraisal audit procedure. None of these steps are required.

Step 1

Receive the requirement to create a number of Mass Appraisal Audit Information records on parcels within any of the following:

- A Saved Dataset
- A Jurisdiction and Neighborhood
- A Range of Tax Map Numbers

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Step 2

Run the Mass Appraisal Audit Pending batch process in order to create Mass Appraisal Audit Information records.:

Result

The MA Audit Pending batch process updates the following fields on the MA Audit Information form:

- **Status:** Sets the **Status** field to **Pending**.
- **Frozen ID:** Sets the **Frozen ID** to **0**. This indicates that the record is current and modifications can be made.

It updates the following fields on the user form as selected on the batch process form.

- Entry Date
- Appraiser
- Entry Code
- Source Code
- Activity Code
- Audit Reason Code

The record can be modified or deleted at this point.

Step 3

Perform audits on the parcels, update the Audit Information records, and set the **Status** field to **Finalized**.

Step 4

Run the MA Audit Finalized batch process in order to create a number of Mass Appraisal Audit Information records for parcels within any of the following:

Result

The MA Audit Finalized batch process updates the following fields on the MA Audit Information form:

- **Status:** Sets the **Status** field to **Finalized**.
- **Value Finalized:** Selects the **Value Finalized** check box.
- **Frozen ID:** The Frozen ID is set to a value starting with -2. This is updated for each audit performed/

Updates the following field as selected on the batch process form.

- **Entry Code**

The record is frozen and cannot be modified, unless the user is granted the required access permissions. Typically, only supervisors have access to modify frozen records.

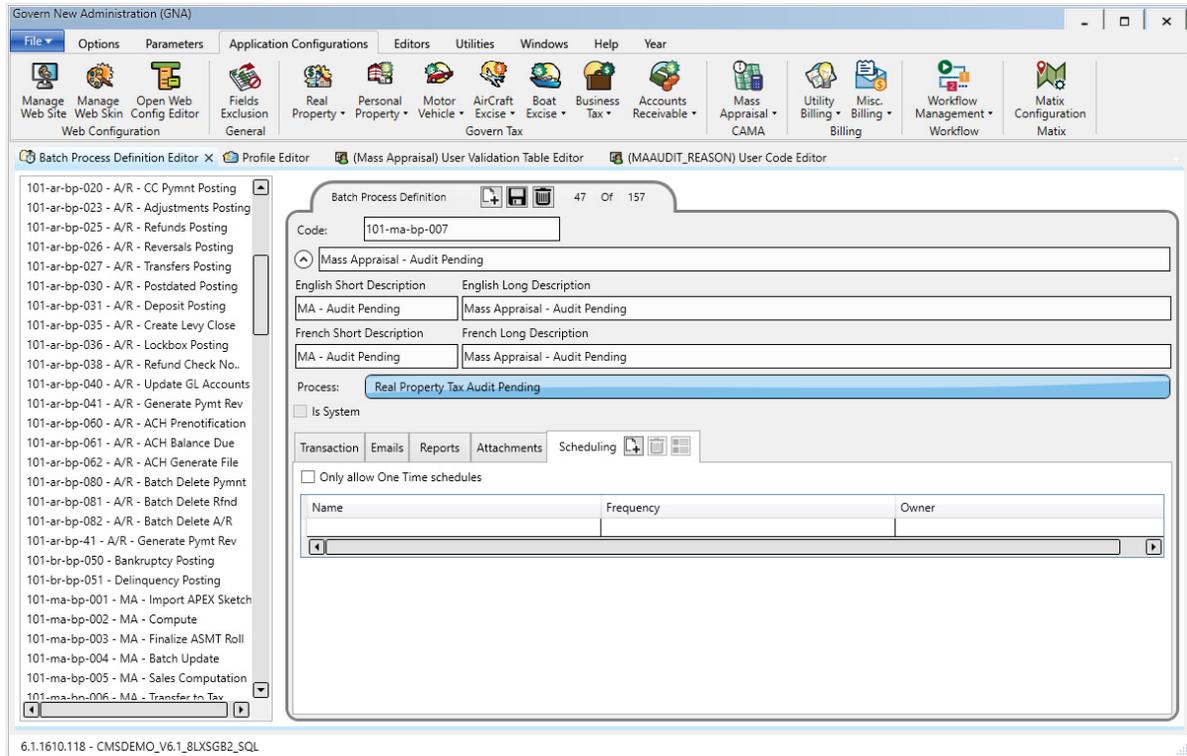
Defining the MA Audit Pending Batch Process

There are no special requirements for the MA Audit Pending batch process. It is set up as any other batch process in Govern OpenForms. You can create as many MA Audit Pending batch processes as required.

To configure the batch process:

1. Launch GNA.
2. Select **Editors > Batch Process Definition Editor**.
3. Select **101-ma-bp-007 > MA – Audit Pending**.

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4. Enter a **Code**, **Short**, and **Long Description** in order to uniquely identify the batch process.
5. Select the **Transaction** tab.
The **Transaction Type** and **Transaction Mode** can be set to any value, depending on how you want to run the batch process. Refer to the Govern Batch Scheduler guide for details.
6. Complete the other parameters as required by your organization.
7. Click **Save**.

Adding the MA Audit Pending Batch Process to a Profile

In order to use the batch process in Govern OpenForms, you must add it to at least one Profile. You can add it to multiple Profiles.

To add the batch process to a Profile:

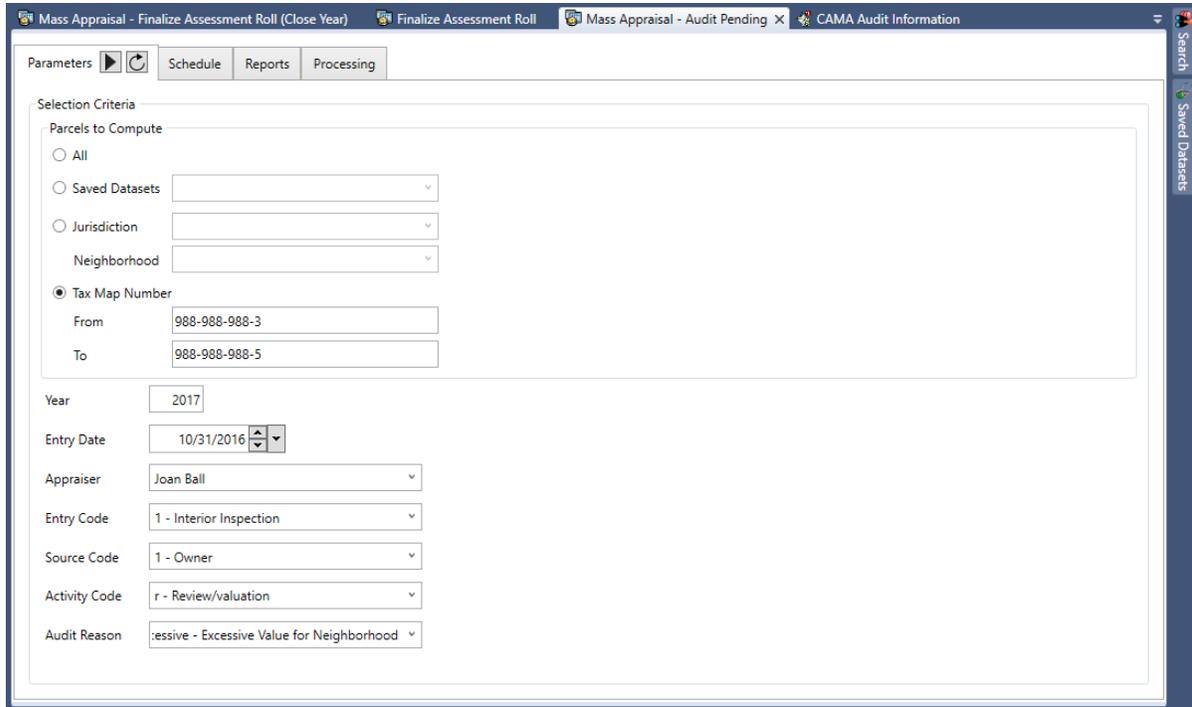
1. Launch GNA.
2. Select **Editors > Profile Editor**.
3. Select the Profile that you want to use.
4. Select the **Links** tab.
5. Click **Add** in the Batch Process section to add open a secondary window.
6. Select the batch process.
7. Click **Save**.

Running the MA Audit Pending Batch Process

To run the batch process:

1. Launch Govern.
2. Open a Profile that contains the MA Audit Pending batch process.
3. Open the Batch Processing Explorer.
4. Select the **Mass Appraisal Audit Pending** batch process.

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Mass Appraisal - Finalize Assessment Roll (Close Year) Finalize Assessment Roll Mass Appraisal - Audit Pending CAMA Audit Information

Parameters Schedule Reports Processing

Selection Criteria

Parcels to Compute

All

Saved Datasets

Jurisdiction

Neighborhood

Tax Map Number

From

To

Year

Entry Date

Appraiser

Entry Code

Source Code

Activity Code

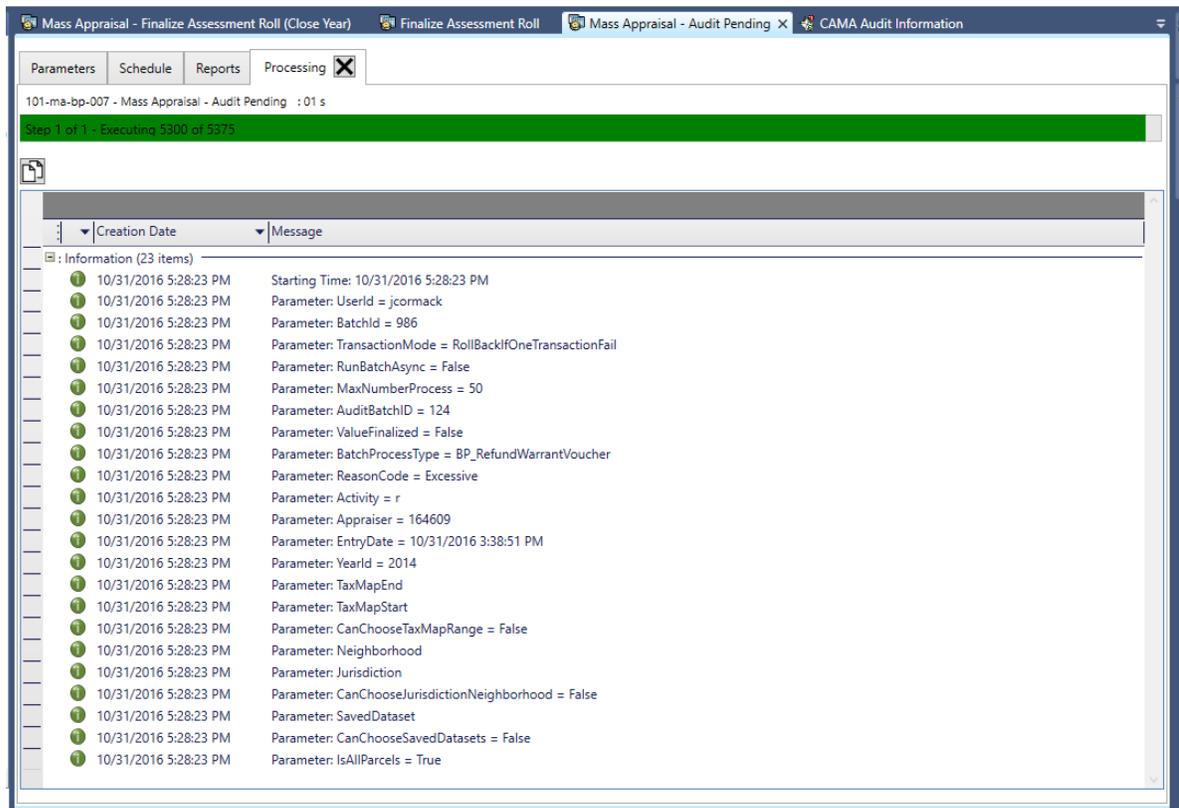
Audit Reason

5. Complete the Selection Criteria as follows.
6. In the **Parcels to Compute** section, do one of the following:
 - Select **All** to create Pending Audit records for all parcels that do not have Audit records for the selected year.
 - Select **Saved Dataset** and select a saved dataset from the drop-down list.
 - Select **Jurisdiction** and select a jurisdiction and neighborhood from the drop-down list.
 - Select **Tax Map Number** and enter a range of tax map numbers.
7. Enter the year you are associating with the Audit records in the **Year** parameter.
8. Click on the calendar icon and select the date of the audit.
9. Select the Appraiser who is responsible for the audit from the Appraiser drop-down list.
10. Select the entry code from the drop-down list (Table: VT_USR.MAENTRY).
11. Select the source code from the drop-down list (Table: VT_USR.MAINFSRC).

12. Select the activity code from the drop-down list (Table: VT_USER.MAACTV).
13. Select the reason for the audit from the Audit Reason drop-down list (Table: VT_USR.MA_AUDIT_REASON).

Viewing the MA Audit Log Files

The following information is logged and appears on the Processing tab of the MA Audit Information batch process in Govern. If you are scheduling the process to run at a later time, the information can be viewed on the Log Files in the Govern Scheduler.



Parameter: **ReasonCode** = The Reason Code selected for the batch Process.

Parameter: **BatchProcesType** = The name of the batch process.

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Parameter: **Appraiser** = The name of the appraiser who is responsible for the audit.

Parameter: **EntryDate** = The date of the audit.

Parameter: **EntryCode** = The entry code selected for the Audit.

Parameter: **Activity** = The activity code selected for the audit.

Parameter: **SourceCode** = The source code selected for the audit.

Parameter: **ValueFinalized** = Displays True or False according to whether the Value Finalized option is selected or deselected.

Parameter: **YearId** = The year the audit occurred.

Parameter: **IsAllParcels** = Displays True or False according to whether All is selected.

Parameter: **CanChooseJurisdictionNeighborhood** = Displays True or False according to whether the Jurisdiction option is selected.

Parameter: **Jurisdiction** = Displays the code for the jurisdiction.

Parameter: **Neighborhood** = Displays the code for the jurisdiction and neighborhood.

Parameter: **CanChooseTaxMapRange** = Displays True or False according to whether the Tax Map Number options is selected.

Parameter: **TaxMapStart** Displays the starting tax map number in the range.

Parameter: **TaxMapEnd**: Displays the ending tax map number in the range.

Parameter: **CanChooseSavedDatasets** = Displays True or False according to whether the saved dataset option is selected.

Parameter: **SavedDataset** Displays the name of the Saved Dataset.

Parameter: **AuditBatchID** = Displays the Batch ID associated with the audit.

Parameter: **MaxNumberProcess** = Displays the maximum number of records processed.

Parameter: **RunBatchAsync** = Displays True or False according to whether the transaction type of the batch process is Synchronous or Asynchronous

Information: Parameter: **TransactionMode** = Displays the transaction type, such as ContinuelfOneTransactionFail

Parameter: **BatchId** = Displays the batch ID.

Parameter: **UserId** = Displays the name of the user who ran the process.

Information: **Starting Time**: Displays the starting of the batch process

Statistics: **Total Records To Process** = Displays the number of records in the batch.

Information: **Statistics**: Total Records Processed = Displays the total number of records processed.

Ending Time: Displays the time the batch process ended.

Viewing the Updated Record in Govern

Once the batch process is run, a new audit record is created with the status set to Pending for all parcel records that meet with the criteria.

Note: If the MA Audit Information form is already open you need to close and reopen it in order to view the pending records generated by the process.

To view the updated records.

1. Launch Govern.
2. Open a Profile that contains the MA Audit Information form.
3. Perform a search to retrieve the required records.
4. Select a record.
5. Open the MA Audit Information form.
6. Scroll to the required record.

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Value Finalized	<input type="checkbox"/>	Status	pending
Fiscal Year	2014	Frozen ID	0
Site Number		Entry Date	10/31/2016
Appraiser	Ball Joan	Entry Code	
Activity Code	Review/valuation	Source Code	

Notes and Comments