FINAL DRAFT

Govern

Personal Property Tax Assessment & Billing

Version 10.8 Release 1.0

Last Revision Update: 12/11/13

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MS Govern

Personal Property Tax Assessment

Govern for Windows™

Version: 1.0

October 2013 - Release 10.8

Disclaimer

MS Govern has taken due care in preparing this manual. However, nothing contained herein modifies or alters in any way the standard terms and conditions of the purchase, lease, or license agreement by which the product was acquired, nor increases in any way the liability of MS Govern to the customer.

Preface

Welcome to Govern for Windows, a comprehensive and fully integrated transaction-driven system written exclusively for local governments. Govern includes a wide variety of database modules:

Computer-Assisted Mass Appraisal (CAMA)

- Appeals & Grievances
- Appraisals / Property Valuations
- Comparables Sales Management

Financial Management

- Account Receivable
- Cash Collection

Land Management

- Business & Individual Licenses
- Complaint Tracking
- Leasing
- Permit Tracking & Inspection Scheduling
- Planing
- Violations

Revenue Management

- Aircraft & Boat Excise Tax
- Miscellaneous Billing
- Personal Property Tax Billing
- Real Property Tax Billing
- Self-Reported Tax Billing
- Special Assessments
- Tax Title / Tax Lien / Tax Sales
- Utility Billing

Since 1980, MS Govern has worked hand-in-hand with State and Local Governments to simplify the implementation of software solutions that automate the flow of information related to their properties.

Govern

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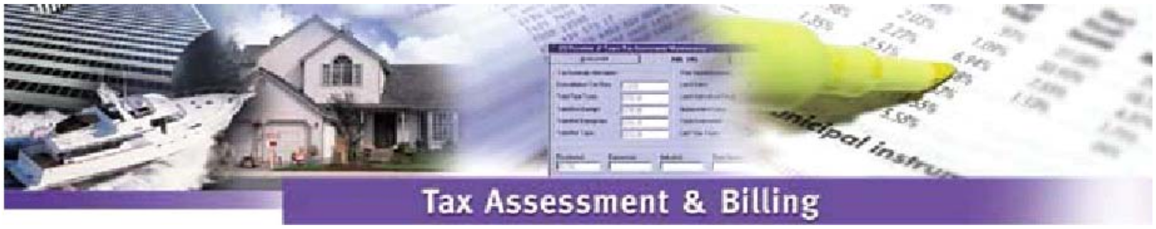


Introduction: Personal Property Tax Assessment & Billing

Govern's Tax Billing (Personal Property) module is a complete, easy to use and comprehensive system. Integrated with Property Control, Mass Appraisal, Accounts Receivables and Cash Collection, the system is able to receive all changes and evaluations made to the property database. The system improves accuracy and reduces the billing preparation period, thus providing a faster return on tax payments. All tax bills, including penalties and interest due are automatically calculated.

The Tax Billing parameters provide a variety of functions including:

- Establishing constants for repetitive values that can be changed on a yearly basis — or more often.
- Setting up structures that are unique to each user and state

The Personal Property module is designed to reduce the number of hours required to process taxes and perform the tasks of the Tax Collector and Assessor, such as creating and maintaining Levy and Exemption Code Definitions and Groups.

What's New

NEW

This section lists the new features in Govern for Windows™, 10.8. Throughout the online manuals and the Help files, the new features are indicated by the **New** symbol.

Govern for Windows

Personal Property Mailing Index

There is now a Mailing Index function for the Personal Property module. Now you are able to directly maintain bill recipient information. In addition the Mailing Index has a new grid for layout. *See Personal Property Mailing Index on page 101 for details.*

CHAPTER ONE: PERSONAL PROPERTY FORMS IN GOVERN ADMIN

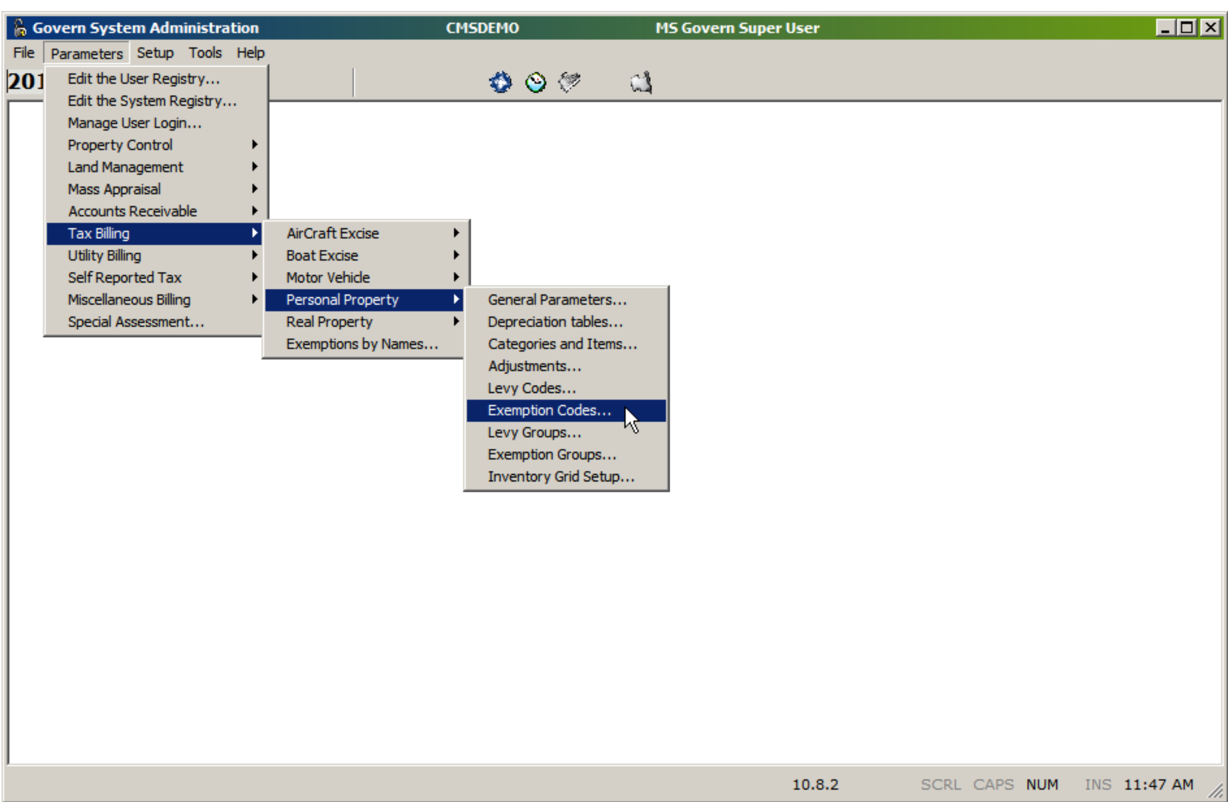
Overview

The first section of this guide describes the forms and parameters that are normally completed and defined by the system administrator.

To access any of these forms, from Govern's main screen, select *Tools* > **System Administration (Govadm32.exe)**

OR

Click the Admin icon  then select *Tax Billing* > *Personal Property* > **Form Name**



Personal Property Administrative Forms

General Parameters

The *Taxation General Parameters* form is used for defining the following parameters:

- Depreciation Year
- Tax Levies
- Prior Year Rate Increase / Decrease
- Accounts Receivable
- Rounding Values

See *General Parameters on page 5*.

Depreciation Tables

The Personal Property Depreciation Tables are used to adjust rates and / or assessment amounts based on the age of personal property items. A depreciation value is assigned to each category of personal property. You can create as many Depreciation Tables as needed. *See Personal Property Depreciation Tables on page 16*.

Categories and Items

The Categories validation table form is used for setting up tables of personal property categories. These will be further subdivided into items for applying the depreciation rates. *See Categories and Items on page 24*.

Adjustments

The Adjustment tables is used to set up a maximum of four personal adjustments. *See Adjustments on page 29*.

Levy Codes

The *Tax Levy Parameters (*Personal Property*)* form is used to set up all the Personal Property Levy Codes with computation methods, rate types and amounts. *See Levy Codes on page 33*.

Exemption Codes

The *Tax Exemption Parameters (*Personal Property*)* form is used for creating and maintaining tax exemptions. Exemptions are applied to Levy Types and can be calculated either before or after the tax calculation. The amount can be limited. *See Exemption Codes on page 37*.

Levy Groups

The Levy *Group Definition (*Personal Property*)* form is used for setting up and maintaining Levy *Groups*. The use of Levy *Groups* facilitates the selection of levies from the Personal Property Assessment Maintenance form for the Govern user. Rather than selecting the required levies one by one, the user can select a group. The system then creates a record for every Levy in the group. *See Levy Groups on page 42*.

Exemption Groups

The *Exemption Group Definition (*Personal Property*)* form is used for setting up and maintaining *Exemption Groups*. The use of *Exemption Groups* facilitates the selection of exemptions from the *Personal Property Assessment Maintenance* form for the Govern user. Rather than selecting the required exemptions one by one, the user can select a group. The system then creates a record for every exemption in the group. *See Exemption Groups on page 45*.

Exemptions by Name

The *Exemptions by Name* form is used to set up exemption parameters to be applied by name. The exemption amount will be distributed according to the priorities set for the tax module. The exemption will be applied in full against the module with the highest priority, then to the module with the second highest priority and so on. In the following example, the exemption amount is $25,000.00 and this is to be applied to Personal Property and Real Estate. Personal Property is assigned a higher priority than Real Estate; the Personal Property assessment is $15,000.00 and the Real Estate is $20,000. $15,000.00 is applied to the Personal Property and $10,000 to the Real Estate. *See Exemptions by Name on page 48*.

General Parameters

Overview

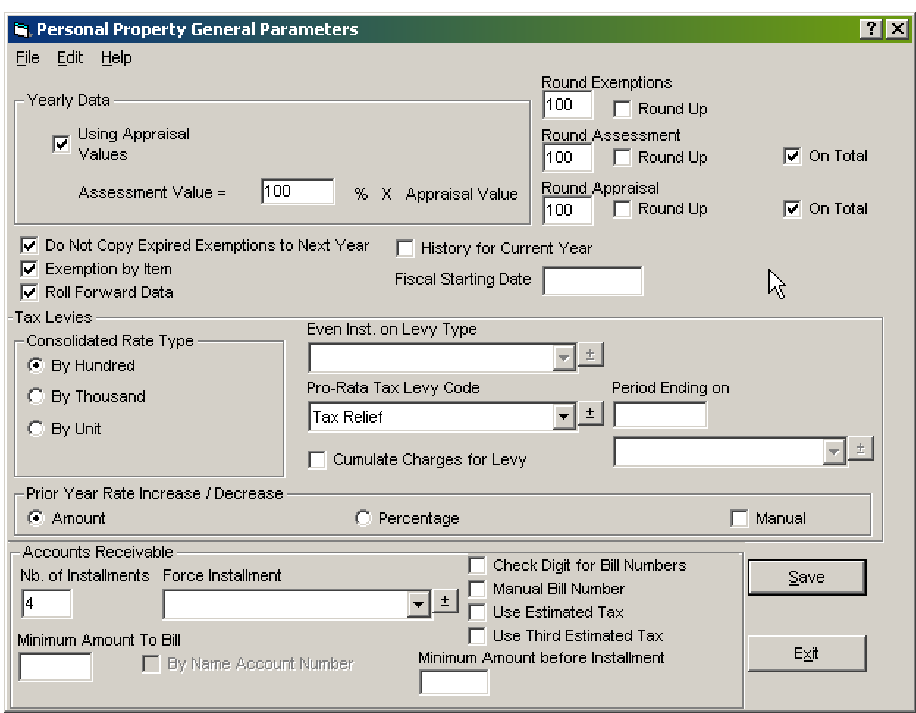
The *Personal Property General Parameters* form is used for defining the following parameters:

- Depreciation Year
- Tax Levies
- Prior Year Rate Increase / Decrease
- Accounts Receivable
- Rounding Values

To access this feature, from Govern's main Screen, select *Tools* > **System Administration (Govadm32.exe)**

OR

Click the Admin icon then select *Parameters* > *Tax Billing* > *Personal Property* > **General Parameters**



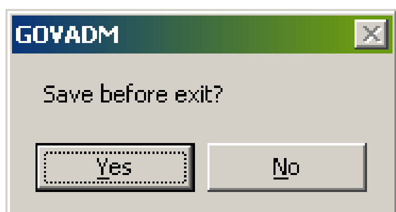
The *Personal Property General Parameters* form is divided into four (4) principal sections:

- Yearly Data
- Rounding and Other System Parameters
- Tax Levies
- Accounts Receivable

Personal Property General Parameters - Command Buttons

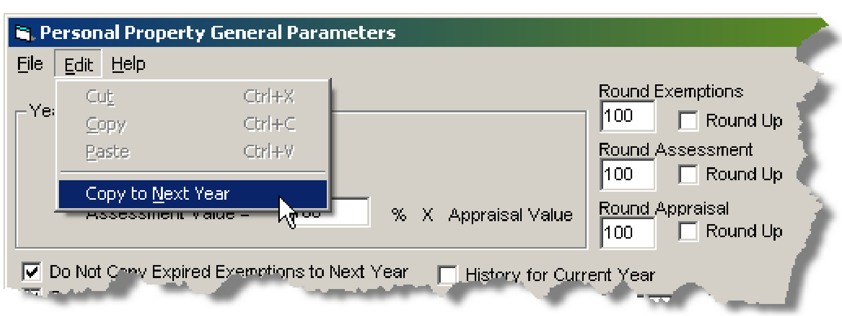
Save: Click **Save** to save a new General Parameters setup or any modifications made to the existing one.

Exit: Click **Exit** to close the current form, if changes have been made, a dialog box will appear to confirm a save before exiting.



Personal Property General Parameters - Menu

Copy to Next Year : Select this option to copy all Levy Codes, Levy Groups and Exemptions to the next fiscal year.



Tip: When initializing a new fiscal year, copy the A/R parameters first before copying the tax parameters.

Personal Property General Parameters - Parameters

Yearly Data group

Using Appraisal Values: Select this option to use the appraisal values. Deselect it if the user will be entering values manually on the *Personal Property Assessment* form. When this value is selected the **Assessment Value** and **Depreciation Year** fields are visible.

Assessment Value: Enter a percentage value to be applied to the appraisal value.

Rounding and Other System Parameters

Round Exemptions: Enter a value for rounding up the exemption amount (in dollars).

For example: If **10** is entered in the Round Exemption field and **Round Up** is selected:
If the Exemption amount = 54 then the Rounded up Exemption = 60
If the Exemption amount = 57 then the Rounded up Exemption = 60
If the Exemption amount = 50 then the Rounded up Exemption = 50

Alternatively, if **10** is entered in the Round Exemption field and **Round Up** is not selected:
If the Exemption amount = 54 then the Rounded Exemption = 50
If the Exemption amount = 57 then the Rounded Exemption = 60
If the Exemption amount = 50 then the Rounded Exemption = 50

Round Assessment: Enter a value (in dollars) to use when rounding the assessment amount.

Note: For example: If 10 is entered in this parameter...
If the Exemption amount = 54 then the Rounded up Assessment = 60
If the Exemption amount = 57 then the Rounded up Assessment = 60
If the Exemption amount = 50 then the Rounded up Assessment = 50

On Total

Select the **On Total** option is selected

Round Appraisal: Enter a value (in dollars) to use when rounding the appraisal amount.

Note: For example: If 10 is entered in this parameter...
If the Exemption amount = 54 then the Rounded up Appraisal = 60
If the Exemption amount = 57 then the Rounded up Appraisal = 60
If the Exemption amount = 50 then the Rounded up Appraisal = 50

Do Not Copy Expired Exemptions to Next Year: Select this option if you don't want to copy the expired exemptions when copying parameters to the next fiscal year from this form or from the *Personal Property Assessment* form in Govern.

History for Current Year: Select the *History for Current Year* option to allow current year records to be changed to the *Frozen Mode* in *Govern*. This option is useful when the personal property value changes during the current year and you need to make a recalculation.

If this option is selected, the active record can be frozen in the *Personal Property Audit Information* function in the current year. The user can then shift to *Historical Mode* in order to view the personal property data prior to the moment the record was frozen.

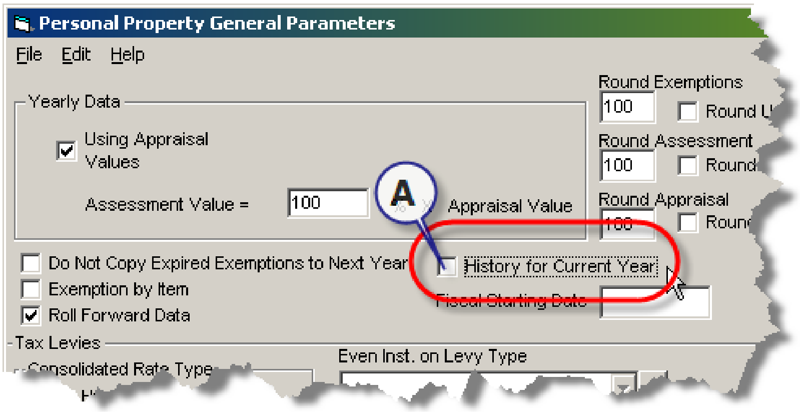
History for Current Year Option and Frozen Records

When selected, the *History for Current Year* option allows an active record to be frozen from the *Personal Property Audit Information* function, and transferred to the PP_ ASSESSMENT table. This change is automatically displayed in the *Personal Property Audit Information* function. *See Personal Property Audit Information on page Personal Property Audit Information on page 93 for more information*.

To enable the *History for Current Year* option in *Govern Admin*...

1. Select *Parameters* > *Tax* > *Personal Property* > **General Parameters...**

2. In the *Personal Property General Parameters* form, click to select the **History for Current Year** option.



Exemption by Item: You can create an exemption for each item on the *Personal Property Assessment* grid. Select this option to enable the *Exemption* fields on the grid. When the user creates an exemption for an item, an exemption record is automatically created on the *Tax Exemption Maintenance* function. *See Personal Property Exemptions Maintenance on page 114*.

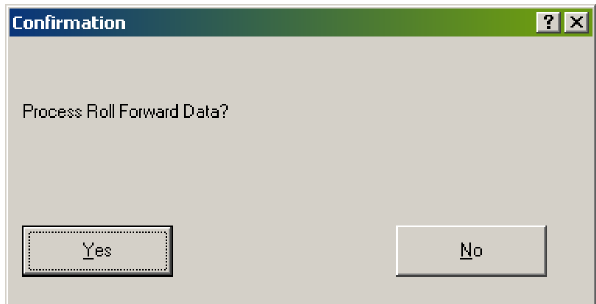
The *Exemption* fields include:

- Exemption Number
- Exemption Override
- Exemption Amount
- Exemption Percentage
- Exemption From (Year)
- Exemption To (Year)
- Number of Months

Roll Forward Data

Roll Forward Data: Select this option to update records, or modifications to existing records, in future years.

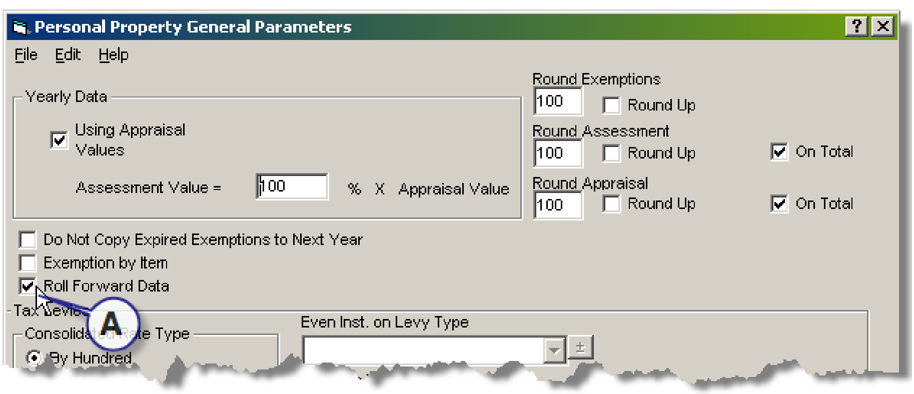
Example: While in Govern, you may be working on fiscal year 2007 and have opened years 2008, 2009, and 2010 in preparation for assessment. In your current year of 2007, you make a change to a field, Govern compares the records with the future years and sees a change. When the *Roll Forward Data* option is selected, you will be prompted with a window requesting you to roll forward any changes. If you click **Yes**, the changed field will be copied to the future years.



To enable *Roll Forward* from *Govern's* main screen:

1. Select *Tools* > **System Administration (Govadm32.exe)**
2. Click the Admin icon  then select *Parameters* > *Tax Billing* > *Personal Property* > **General Parameters**

On the Motor Vehicle General Parameters window, select **Roll Forward Data**..



Note: The enabling of this feature is identical for the Aircraft, Boat, Personal Property, and Real Property sub-systems

Roll Forward Data Computations

Any computations that are required when data is rolled forward, are performed immediately on the year being accessed and all qualifying years.

Computations as a result of the *Roll Forward* option will also occur during a *Batch Update*.

Note: Due to the fact that all computations are performed immediately, the Roll Forward function can be both time and system intensive depending on the number of records involved.

Roll Forward and Frozen Records

Frozen Records are snapshots of data records prior to when a modification was made to the record. *Frozen ID's* are identifiers of the modification status of a record. The following is an indication of the assignment of frozen ID's:

Record Status	Assigned Frozen ID
Current Year Record	0
Sales Record	1, 2, 3, 4...
Closed Year Record	-1
Audit Record	-2, -3, -4, -5...
Simulation Data	32,767
Split Merged Data	-32,766 and higher; e.g. -32,765, -32,764, -32,763...

Exemption Number: The user selects the Personal Property Exemption to apply to the item or leaves the field blank if no exemption is to be applied.

Note: You need to create Personal Property Exemptions for the current year. *See Exemption Codes on page 37*.

Note: If the same exemption applies to two or more items, only one exemption record is created. The total value for all exemptions is displayed.

Exemption Override: The user selects **Yes** to override the default exemption parameters. Then, enters the amount or percentage value. This field can be left blank, or set **No** to use the default parameters with no override.

Exemption $: If the user is overriding the exemption, an amount or percentage needs to be entered.

Exemption %: If the user is overriding the exemption, an amount or percentage needs to be entered.

Exemption From Year: Enter the first year the exemption is valid.

Exemption To Year: Enter the last year the exemption is valid.

Note: When exemptions are copied to the following year, this exemption is copied if the year is still valid.

Number of Months: Enter the number of months to prorate the exemption, within the year. Leave this field blank if the exemption is not prorated.

Note: You can enter a maximum of 12 months.

Tax Levies group

Consolidated Rate Type: Select the rate type (by hundred, thousand or unit). The consolidated rate type is displayed on the *Personal Property Assessment* form in Govern.

Note: This value is displayed only if all previous taxes were computed with the Base x Rate type and applied on the same Base Column.

Even Inst. on Levy Type: This field is enabled only if **Even Installment** is selected in the **Force Installment** field. Select the **Levy Type** from the drop-down list (Table: VT_USR_ LEVYTYPE). The **Even Installment** will be applied to all levies of the selected levy type.

Pro-Rata Tax Levy Code: Select a **Levy Code** for pro rating the exemption, from the drop-down list. For example, if an exemption is removed half way through the year, the billing for will be pro rated by the equivalent of six months in the following fiscal year, on the selected Levy Code.

Period Ending on: This field is enabled only if you select a **Pro-Rata Tax Levy Code**. Double-click in the field and select the ending data from the pop-up calendar.

Cumulate Charges for Levy: If this option is selected, the unpaid amount from the previous year is added to the selected levy.

Prior Year Rate Increase / Decrease group

Amount, Percentage, Manual: Select an option, amount, percentage or manual for displaying the Prior Year Rate Increase or Decrease on the *Tax Levy Parameter* form in Govern Admin. Select manual if you want the user to be able to override the value and manually enter the amount or percentage. This is useful when you are setting up codes for the first fiscal year.

Accounts Receivable group

Nb of Installments: Enter the number of installments to be used during the billing process to a maximum of 12.

Force Installment: Select the installment type you want to use, from the drop-down list. If you choose to force an even installment, the **Even installment on Levy Type** field will be enabled.

Note: A penny could be added to each installment, if dividing by the number of installments the remainder is greater than 0. Example: If we have 4 installments and the remainder is 3, a penny is added to the last 3 installments.

Check Digit for Bill Numbers: Do not use this option for regular sequencing. Select this option to use a *check digit* on your next billing. A check digit is a number generated by the system through a series of mathematical operations on the bill number and is used to isolate data entry errors during the collection phase.

A check digit can be used to ensure that a newly entered bill number does not already exist and has been entered by mistake, as illustrated in the following example:

yyyypp999999 (6) (total 10 car.) where yyyy is the year, pp is an optional prefix up to two characters in length and 999999 is the bill sequence number.

Example: 1999R000001

1	*	3	=	3
9	*	7	=	63
9	*	1	=	9
9	*	3	=	27
0	*	7	=	0
0	*	1	=	0
0	*	3	=	0
0	*	7	=	0
0	*	1	=	0
1	*	3	=	3

3 + 63 + 9 + 27 + 3 = 105 Total = 105

Total = 105 + ASCII(R) 82 (See ASCII table in Appendix)

If total /10 = (modulus = 0) then the check digit = 1

Otherwise check digit = 10 - (modulus)

In this example then: 105 + 82 = 187

187 / 10 = 18.7

10 – 7 = 3

3 = the check digit used

Manual Bill Number: Select this option if you want the Govern user to manually enter an A/R bill number on the *Personal Property Assessment* form in Govern. This is useful when the same bill numbers are needed for clients year after year. If this option is left blank, the system generates a new number.

Use Estimated Tax: Select this option to use the estimated tax process to calculate the net taxes due based on the values from previous fiscal year.

If the client receives quarterly billings, the first two estimated quarters will be based on ***half*** the net Ad Valorem actual tax from the previous year. The system will then distribute this amount equally between the first and second quarter billing. The third and fourth quarter billing will be based on the new tax rate and will use the following formula to calculate the actual tax:

Assessed Value * New Tax Rate = Actual Amount Due (Total)

(Actual Amount Due (Total) – First Half Payment) / 2 = 3rd and 4th Quarter payments due

> **Note:** The estimated tax process can also be set up for cases with only a 1st and 2nd half billing.

Transfer A/R to Tax Title: Select this option if you want to transfer the A/R data posted in the Personal Property module (for the selected properties) to the Tax Title A/R Class Code defined for each Personal Property A/R Class Code, in the A/R Class Parameters when you run the *Tax Title Transfer* process in Govern Batch.

Minimum Amount to Bill: Enter the minimum amount to be billed. This is used if the levy total is less than this amount.

Minimum Amount Before Installment: Enter the minimum amount required before installments can be applied to tax bills.

> **Example:** If you enter $100.00, as the minimum, and the client owes only $50.00, a single bill is issued. If the client owes $101.00, i.e. more than the minimum amount, this amount is divided into installments and billed accordingly.

Personal Property Depreciation Tables

Overview

The *Personal Property Depreciation Tables* are used to adjust rates and / or assessment amounts based on the age of personal property items. A depreciation value is assigned to each category of personal property. You can create as many *Depreciation Tables* as needed.

For example, a table can be created that makes an adjustment of 1% per year, another that applies 2% Depreciation each year, etc. The depreciation table is referenced from the *Personal Property Item* validation code form.

The depreciation is calculated by subtracting the **Year**, entered for the item on the **Inventory** tab of the *Personal Property Assessment* form, from the **Depreciation Year**, entered on the *Personal Property General Parameters* form and applying the value entered for the resulting number of years from the Depreciation tables.

Example: Depreciation Table: Depr01, Depreciation codes: Year 01= 5%, Year 02 = 6%...

The system creates a table named VT_USR_XXX, where xxx is the table name you enter.

The VT_USR_PP_DEPR table is used to store the depreciation table names for Personal Property.

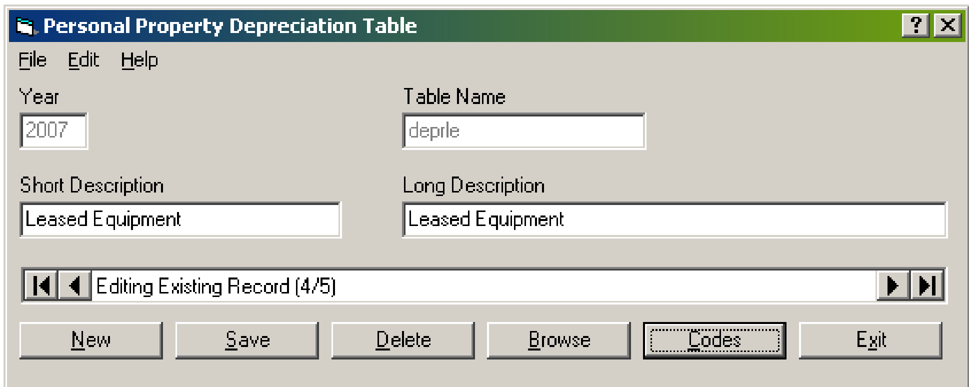
The PP_PARM_DEPR table is used to store the depreciation table codes and values.

Note: All depreciation codes are stored in the same table.

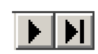
To access this function, from Govern's main screen, select **Tools** > **System Administration (Govadm32.exe)**

OR

Click the Admin icon then select *Parameters* > *Tax Billing* > **Personal Property Depreciation Table**



Depreciation Table Command Buttons

Viewing Depreciation Tables: Each depreciation table is saved as a separate record. To view individual records use the right  and left  navigational arrows or click **Browse** to view a list of all the Personal Property Depreciation tables.

Creating a New Depreciation Table: To create a new depreciation table, click **New** and enter the required information. The **Exit** button switches to **Cancel** so that you can cancel a new entry.

Saving the Depreciation Table: Click **Save** to save a new depreciation table or any modifications to an existing one.

Deleting a Depreciation Table: Click **Delete** to remove a Depreciation Table. A confirmation message is displayed. Click **OK** to continue or **Cancel** to return to the *Depreciation Table* form.

Browsing Depreciation Tables: Click **Browse** to view a list of all the Personal Property Depreciation tables.

Creating Codes: Click **Codes** to create the validation codes for the current Personal Property validation table.

Depreciation Table Parameters

Year: The Year field displays the default fiscal year as it appears at the bottom left of the screen. To change the default year, click **File** > **Set Default Year**. Enter the year in the text box and click **OK**.

Table Name: Enter a table name up to eight alphanumeric characters in length.

The system creates a table called VT_USR_<*table name*>, where *table name* is the name you have entered.

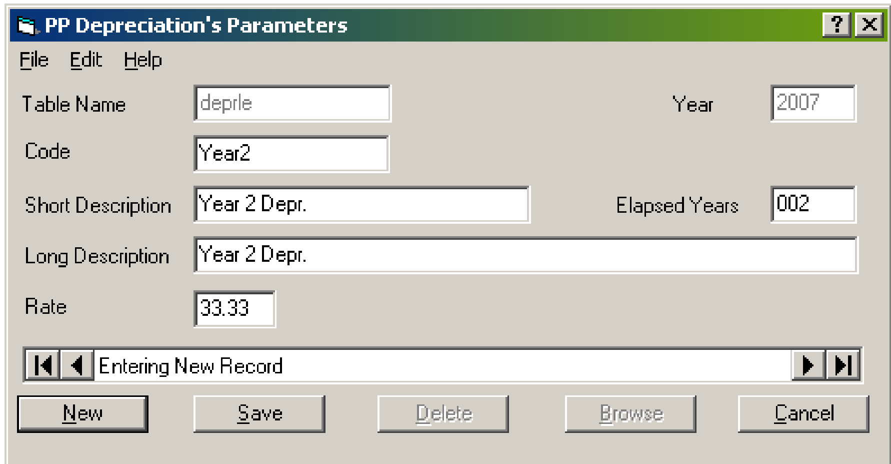
> **Note:** Microsoft® Access has a restriction of 15 characters for a table name. The system prefix VT_USR_, with the underscores, is seven characters. This leaves a maximum of eight characters for your table name. You cannot use special characters.

You will reference the depreciation table by this name when you set up the Personal Property categories and items.

Short Description: Enter a short description. This is used for fast data entry and look-ups where space is limited on forms.

Long Description: Enter a description. This is displayed on forms and reports and is used for look-ups.

Creating Codes: Click **Codes** to create the validation codes for the current Personal Property validation table.



Viewing Depreciation Codes: Each depreciation validation code is saved as a separate record. To view individual records use the right and left navigational arrows or click Browse to view a list of all the Personal Property Depreciation codes.

Depreciation Table Codes Command Buttons

Creating a New Code: Click **New** to create a new validation code for the current table. The **Exit** button switches to **Cancel** so that you can remove unsaved information without closing the form.

Saving the Code : Click **Save** to save a new validation code or any modifications to an existing one.

Deleting a Code: Click **Delete** to remove a validation code. A confirmation message is displayed. Click **OK** to continue or **Cancel** to return to the validation code form.

Browsing Codes: Click **Browse** to view a list of all the Personal Property Depreciation table validation codes.

Depreciation Table Codes Parameters

Table Name: This field displays the name of the current validation table.

Year: The Year field displays the default fiscal year.

To change the default year, click on the year field on the Govern Toolbar; enter a new year in the text box and click **OK**. Alternately, you can click **File** > **Set Default Year**.

Code: Enter a name for the validation code.

Short Description: Enter a short description. This is used for fast data entry and look-ups where space is limited on forms.

Long Description: Enter a description. This is displayed on forms and reports and is used for look-ups.

Elapsed Years: Enter the number of years to be used for applying the depreciation rate. When calculating the depreciation, the system subtracts the **Year** entered on the *Personal Property Assessment* from the **Depreciation Year** entered on Personal Property General Parameters form. The resulting number of years is compared to the value entered in this field. If the value is greater than zero, the applicable code is applied. Otherwise, no depreciation is applied.

Note: Create a depreciation code and enter 999 in the Elapsed Years field. This value is used for codes where no matching elapsed year is found. For example, if the system calculates an elapsed year value of 36, and the last record defined is for 25 years, the system will apply the depreciation value assigned to this record. This feature facilitates the creation of validation codes where a standard depreciation rate is used after a certain number of years.

Computation of Elapsed Years

$$\mathbf{N = Y_D - Y_O}$$

where...

N - *Number of Years (Elapsed Years)*
$\mathbf{Y_D}$ - *Depreciation Year (Year ID)*
$\mathbf{Y_O}$ - *Original Year (Year entered on assessment form)*

If **N** <= **0** then the exact match will be found in the **Depreciation Parameter** for **Number of Years = 0**

If not...

a match will be found with **Number of Years** in **Depreciation Parameter >= Number of Years**

Rate: Enter a percentage value to be used for the depreciation rate.

Depreciation Validation Code Examples

Year Zero and Negative Years

Example: Entries are made that correspond to the following table:

Elapsed Years	Depreciation (%)
000	2.0
001	3.0
002	4.0
003	5.0
005	6.5

When a depreciation is required for **Year 0**, an entry must be created to address an **Elapsed Year** of **0**, and the required depreciation value is specified as 2.0%.

Note: If no record is created that corresponds to an **Elapsed Year** of **0**, then there will be no depreciation applied. Likewise in instances when a *negative year* is encountered, no depreciation will be applied.

Applying the Same Depreciation to Subsequent Years

Example: Entries are made that correspond to the following table:

Elapsed Years	Depreciation (%)
0	2.0
1	3.0

Elapsed Years	Depreciation (%)
2	4.0
3	5.0
4	6.5
99	6.5

When the value of the last year of depreciation, **Elapsed Year 4**, is required to be applied for all following years, you will have to create an entry that will correspond to an arbitrary **Year 99**. Creating this entry ensures that all values between the final **Elapsed Year** of depreciation up to **Elapsed Year 99** will always be depreciated at whatever value is set for **Year 99**.

In the above table, a depreciation of 6.5% will be applied to all elapsed years between year 5 and year 99.

Note: If the entry for year 99 is not made then there will be no depreciation applied after year 4.

Alternatively if no depreciation is required after a specific year, as might be the case with leased equipment in the following example:

Elapsed Years	Depreciation (%)
1	33.33
2	33.33
3	33.34

In the above table, because there is no entry for **Year 0**, there will be no depreciation applied. **Year 1** to **Year 3** will see a depreciation applied, but all following years will not see depreciations as there are no entries after Year 3.

Missing Sequential Years

When an entry corresponds to a year that is missing from the depreciation validation table, the depreciation value for the following year will be used.

Example: Entries are made that correspond to the following table:

Elapsed Years	Depreciation (%)
0	2.0
1	3.0
2	4.0
3	5.0
5	6.5
6	8.0
7	10.0
99	10.0

As a result of an oversight, we see that **Elapsed Year 4** may have been accidentally omitted. When a value that corresponds to **Elapsed Year 4** is required in a calculation, the depreciation value for the next year in the sequence, **Elapsed Year 5**, will be used. Effectively the depreciation that will be applied for **Elapsed Year 4** is 6.5%.

Refer to the Super User guide for details on the Formula Editor, the Logical Expression Block Editor and queries.

For definitions of the other parameters on the Personal Property Depreciation validation code form, see Depreciation Table Codes Parameters on page 19.

Categories and Items

Overview

The Categories validation table form is used for setting up tables of personal property categories. These will be further subdivided into items for applying the depreciation rates.

The categories are stored in the PP_TABLE. A table named VT_USR_*XXX* will be created, where *XXX* is the name you have assigned to the category table. For each category, the system creates two columns in the PP_ASSESSMENT table, as follows:

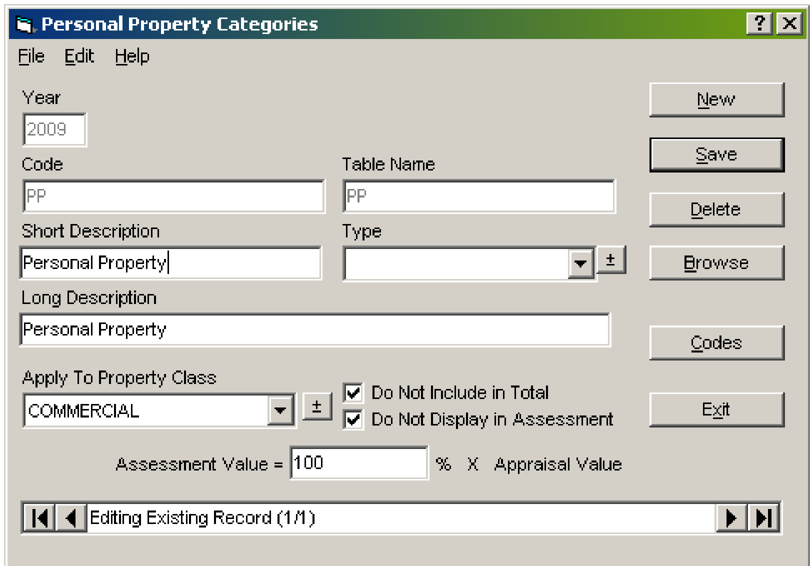
- AS_*Category Name* for the assessed value of the property
- AP_*Category Name* for the appraised value of the property

The total assessment value is saved in The VA_AS_TOTAL column of the PP_ASSESSMENT table.

To access this function, from Govern's main screen, select **Tools** > **System Administration (Govadm32.exe)**

OR

Click the Admin icon then select *Parameters* > *Personal Property* > **Categories and Items**



Personal Property Categories Command Buttons

Viewing Category Records: Each category setup is saved as a separate record. To view individual records use the right and left navigational arrows or click **Browse** to view a list of all the records.

Creating a Category Record: To create a new record, click **New** and enter the required information. The **Exit** button switches to **Cancel** so that you can cancel a new entry.

Saving the Depreciation Table: Click **Save** to save a new record or any modifications to an existing one.

Deleting a Record: Click **Delete** to remove a record. A confirmation message is displayed. Click **OK** to continue or **Cancel** to return to the *Personal Property Categories* form.

Personal Property Categories Parameters

Year: The Year field displays the default fiscal year for your department.

To change the default year, click on the year field on the Govern Toolbar; enter a new year in the text box and click **OK**. Alternately, you can click *File* > **Set Default Year**.

Table Name: Enter a table name up to eight alphanumeric characters in length.

The system creates a table called VT_USR_<*table name*>, where *table name* is the name you have entered.

> **Note:** Microsoft® Access has a restriction of 15 characters for a table name. The system prefix VT_USR_, with the underscores, is seven characters. This leaves a maximum of eight characters for your table name. You cannot use special characters.

You will reference the depreciation table by this name when you set up the Personal Property categories and items.

Short Description: Enter a short description. This is used for fast data entry and look-ups where space is limited on forms.

Long Description: Enter a description. This is displayed on forms and reports and is used for look-ups.

Type: Select a **Type** from the drop-down list (Table: VT_USR_PPGRCAT). The types are used to group categories and facilitate report creation.

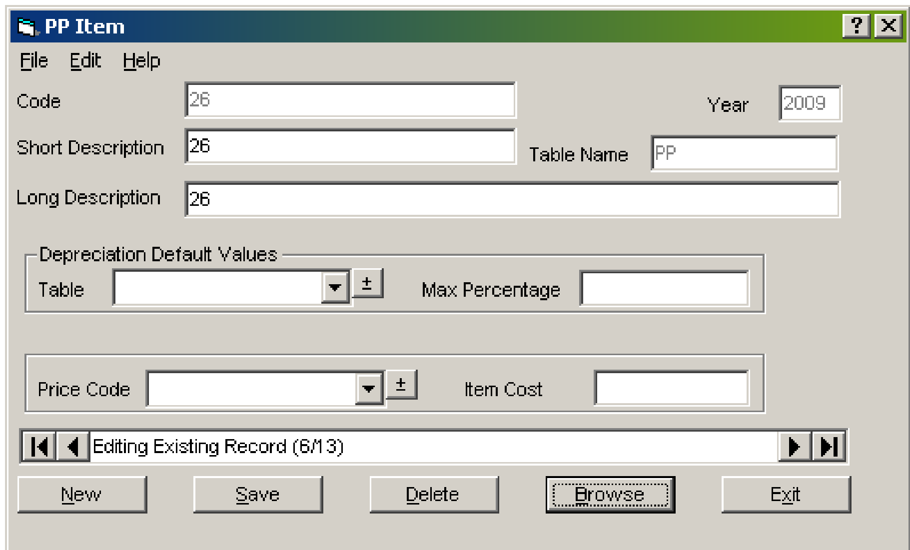
Apply to Property Class: Select a property class from the drop-down list or leave this field blank to apply the record to all property classes (Table: VT_USR_PUSE).

Do Not Include in Total: Select this option to exclude the value of this personal property category from the total value of the inventory.

Do Not Display in Assessment: Select this option to exclude the value of this personal property category from the assessed value. The category is not displayed on the **Assessment** tab of the *Personal Property Assessment* function Govern; however, the value is included in the total.

Creating Codes: Click **Codes** to create the validation codes for the current validation table.

Personal Property Items



Personal Property Items Command Buttons

Viewing Personal Property Item Validation Codes: Each validation code is saved as a separate record. To view individual records use the right and left navigational arrows or click Browse to view a list of all the Personal Property Items.

Creating a New Code: Click **New** to create a new validation code for the current table. The **Exit** button switches to **Cancel** so that you can remove unsaved information without closing the form.

Saving the Code : Click **Save** to save a new validation code or any modifications to an existing one.

Deleting a Code: Click **Delete** to remove a validation code. A confirmation message is displayed. Click **OK** to continue or **Cancel** to return to the validation code form.

Personal Property Items Parameters

Table Name: This field displays the name of the current validation table.

Year: The Year field displays the default fiscal year.

To change the default year, click on the year field on the Govern Toolbar; enter a new year in the text box and click **OK**. Alternately, you can click **File** > **Set Default Year**.

Code: Enter a name for the personal property item.

Short Description: Enter a short description. This is used for fast data entry and look-ups where space is limited on forms.

Long Description: Enter a description. This is displayed on forms and reports and is used for look-ups.

Depreciation Default Values: Select a depreciation table from the drop-down list to use as the default depreciation for the item model.

Max Percentage: Enter the maximum percentage value to use when assessing the value of a personal property item.

Price Code: Select a price code to apply to the item (Table: VT_USR_PPCOSTCD).

Note: This table needs to be previously set up in Govern Admin.

Item Cost: Enter the price to apply to the item. This will be displayed on the Personal Property Assessment form in Govern where it can be modified by the Govern user.

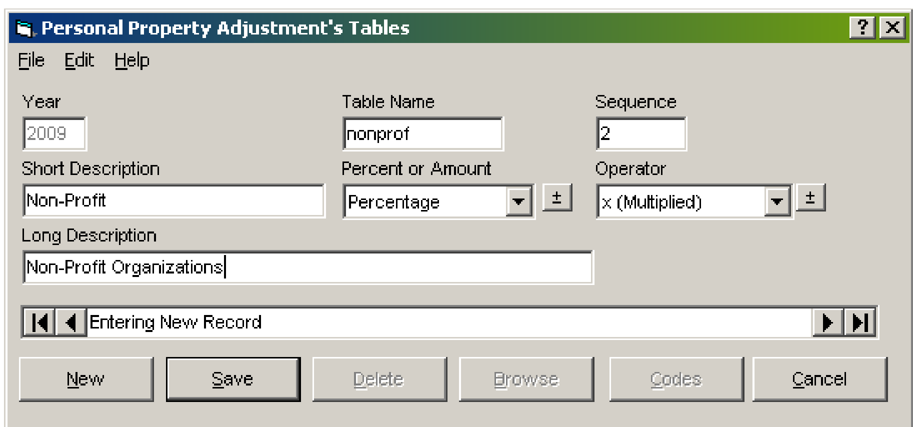
Adjustments

The Personal Property Adjustment Tables are used for creating adjustment validation tables and codes for personal property items.

To access this feature, from Govern's main screen, select *Tools* > **System Administration (Govadm32.exe)**

OR

Click the Admin icon then select *Parameters* > *Tax Billing* > *Personal Property* > **Adjustments...**



Personal Property Adjustment Command Buttons

Viewing Personal Property Adjustment Tables: Each equivalence table is saved as a separate record. To view individual records use the right and left navigational arrows or click **Browse** to view a list of all the tables.

Creating a New Adjustment Table: To create a new depreciation table, click **New** and enter the required information. The **Exit** button switches to **Cancel** so that you can cancel a new entry.

Saving the Adjustment Table: Click **Save** to save a new adjustment table or any modifications to an existing one.

Deleting an Adjustment Table: Click **Delete** to remove an Adjustment Table. A confirmation message is displayed. Click **OK** to continue or **Cancel** to return to the *Personal Property Adjustments Table* form.

Year: The Year field displays the default fiscal year for your department.

To change the default year, click on the year field on the Govern Toolbar; enter a new year in the text box and click **OK**. Alternately, you can click **File** > **Set Default Year**.

Table Name: Enter a table name up to eight alphanumeric characters in length.

The system creates a table called VT_USR_<*table name*>, where *table name* is the name you have entered.

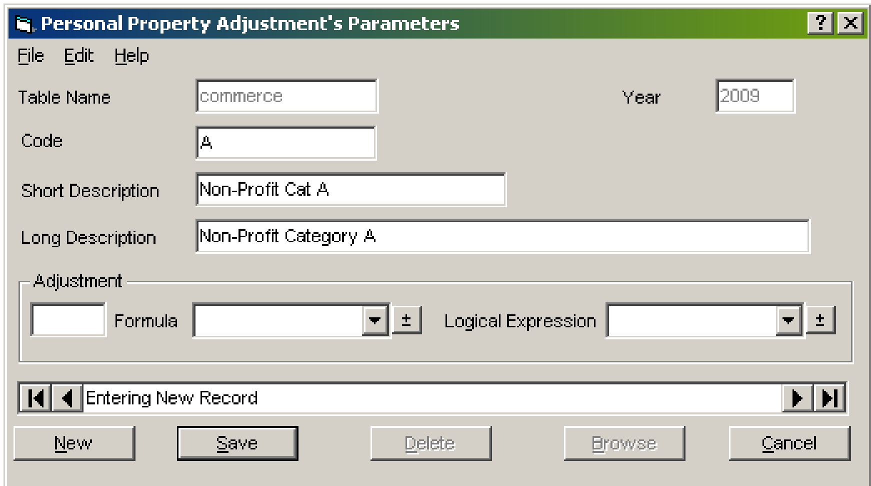
> **Note:** Microsoft® Access has a restriction of 15 characters for a table name. The system prefix VT_USR_, with the underscores, is seven characters. This leaves a maximum of eight characters for your table name. You cannot use special characters.

The *Adjustment Table Name* will be displayed as a separate column under the **Inventory** tab on the *Personal Property Assessment* form in Govern.

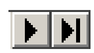
Short Description: Enter a short description. This is used for fast data entry and look-ups where space is limited on forms.

Long Description: Enter a description. This is displayed on forms and reports and is used for look-ups.

Creating Codes: Click **Codes** to create the validation codes for the current Personal Property validation table.



Personal Property Adjustment Command Buttons

Viewing Adjustment Codes: Each adjustment validation code is saved as a separate record. To view individual records use the right  and left  navigational arrows or click Browse to view a list of all the Personal Property Adjustment Tables.

Creating a New Code: Click **New** to create a new adjustment code for the current table. The **Exit** button switches to **Cancel** so that you can remove unsaved information without closing the form.

Saving the Code : Click **Save** to save a new adjustment code or any modifications to an existing one.

Deleting a Code: Click **Delete** to remove a adjustment code. A confirmation message is displayed. Click **OK** to continue or **Cancel** to return to the validation code form.

Personal Property Adjustment Parameters

Table Name: This field displays the name of the current adjustment table.

Year: The Year field displays the default fiscal year for your department.

To change the default year, click on the year field on the Govern Toolbar; enter a new year in the text box and click **OK**. Alternately, you can click **File** > **Set Default Year**.

Code: Enter a name for the validation code.

Short Description: Enter a short description. This is used for fast data entry and look-ups where space is limited on forms.

Long Description: Enter a description. This is displayed on forms and reports and is used for look-ups.

Adjustment group

Percentage or Amount: Select **Percentage** or **Amount** if you are entering a value in the next field. Otherwise select or create a logical expression or formula.

> **Note:** You can enter a value in only one of the fields: **Percentage** / **Amount**, **Formula** or **Logical Expression**..

Formula: Select a **Formula** from the drop-down list or click the ± button to open the *Formula Editor* and create a new formula. Refer to the *Super User* guide form details.

Logical Expression. Select a **Logical Expression** from the drop-down list or click the ± button to open the *Logical Expression Block Editor* and create a new formula. Refer to the *Super User* guide form details.

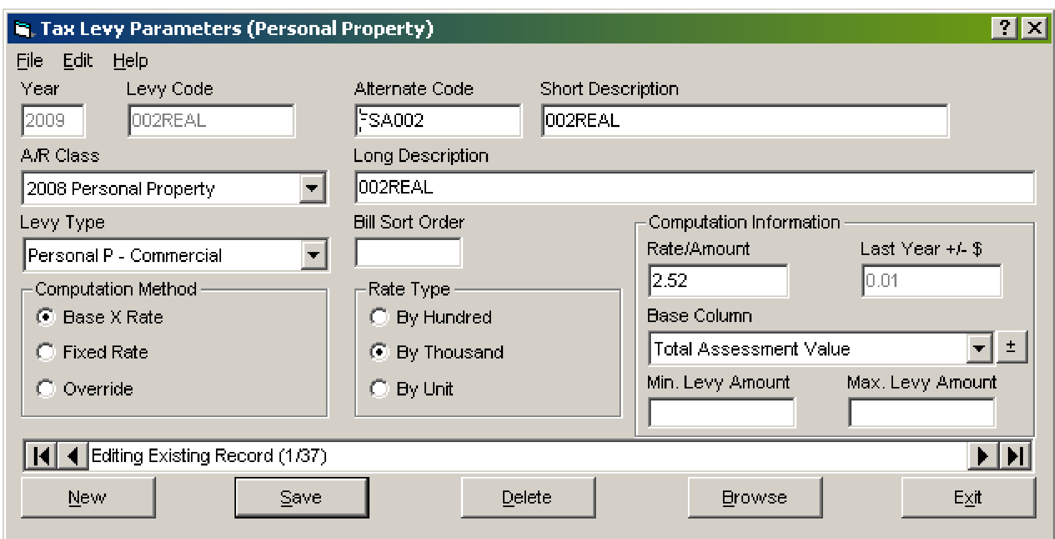
Levy Codes

The *Tax Levy Parameters* Personal Property form is used to set up all the Personal Property Levy Codes with computation methods, rate types and amounts.

To access this feature, from Govern's main screen, select **Tools** > **System Administration (Govadm32.exe)**

OR

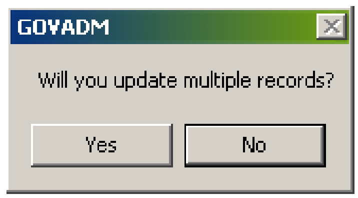
Click the Admin icon then select *Parameters* > *Tax Billing* > *Personal Property* > **Levy Codes**



Viewing Tax Levy Parameter Records: Each tax levy parameter setup is saved as a separate record. To view individual records use the right and left navigational arrows or click **Browse** to view a list of all the Personal Property Tax Levy Parameters.

Creating a Levy Code: To create a new levy code, click **New** and enter the required information. The **Exit** button switches to **Cancel** so that you can delete new information without closing the form.

Saving a Levy Code: Click **Save** to save a new levy code or any modifications made to an existing one. A prompt is displayed asking you to confirm if you are updating multiple records:



If you click **No**, only the *ModifStamp* of the records for the current levy will be updated. The system recalculates the levies for the affected records only. If you click **Yes**, the PP_MODIF_STAMP table will be updated. The system recalculates all levies for all records.

Note: The prompt is displayed only if you have changed fields that affect the computation, such as rate computation method, base column or rate type. It is not displayed for a closed year.

Deleting a Levy Code: Click **Delete** to remove a levy code. A confirmation message is displayed. Click **OK** to continue or **Cancel** to return to the *Tax Levy Parameters* form.

Exit: Click **Exit** to close the form. A confirmation message is displayed if there are any unsaved modifications. Click **Yes** to save your modifications. Click **No** to close the form without saving the new information or **Cancel** to return to the *Tax Levy Parameters* form.

Year: The Year field displays the default fiscal year.

To change the default year, click on the year field on the Govern Toolbar; enter a new year in the text box and click **OK**. Alternately, you can click **File** > **Set Default Year**.

Tax Levy Parameters are saved by year, use this procedure to view the parameters for a different year.

Levy Code: Enter the Levy Code to be used with this record.

Alternate Code: Enter an alternate code if needed. Typically, this is used for reports. For example, if you want to use your own codes as Levy Codes and the state codes are different from yours, the state reports could be printed using the alternate codes.

Short Description: Enter a description to be used for fast data entry and look-ups if space is limited on forms.

Long Description: This description will be displayed for look-ups, on forms and normally used for reporting.

A/R Class: Select the Accounts Receivable Class from the drop-down list to apply to this record (Table: VT_USR_AR_CLASS <user>). Refer to the *Accounts Receivable* guide for details.

Levy Type: Select the Levy Type from the drop-down list (Table: VT_USR_LEVYTYPE). The Levy Type will be use as a link to apply exemption.

Bill Sort Order: Enter the Bill Sort Order to be used when printing the bills. If nothing is entered or the same bill order is entered for 2 different Levy Codes, an alphabetical sort is done on the Levy Code. This field is alphabetical, so the sort (on Levy Codes) will use the alphabetical order (1, 10, 100… 2, 20, etc.).

Computation Method: There are three methods for computing the levy:

- **Base X Rate**: for the billing process.
- **Fixed Rate**: for special charges and fees.
- **Override**: for one-time tax definitions that are deleted from the Master file during the END-OF-YEAR process. These can also be used for interest and variable adjustments, such as abatements.

Rate Type: Select a **Rate Type** only if the selected computation method is **Base x Rate**.

Computation Information

Rate / Amount: If the selected computation method is **Base x Rate** or **Fixed Rate**, enter a Rate or an Amount value.

Last year +/- ($,%): This field automatically displays the Prior Year Rate Increase / Decrease calculation if the **Amount** or **Percentage** option is selected on the Personal Property *General Parameters* form. If the Manual option is selected on the Personal Property *General Parameters* form, you can enter a value.

Base Column: Select the Base Column to be used with the Levy Code (available only if the computation method is **Base** x **Rate**). If this field is left blank, the Total Assessment Value, VA_TOTAL_ASSMT is the default.

Creating a Base Column

To create a new Base Column, click the ± button. This opens the New Database Fields Creation form, where you can enter a new Base Column and label. The new column name is added to the assessment table, PP_ASSESSMENT and appears at the top left corner on the first tab of the Personal Property Assessment form. You can move it to any position using the **Object Dragging Mode** and change the label with the **Field Setup Mode** feature. These options are available from the **Setup** menu in Govern. Refer to the *Super User* guide for complete details.

Maximum Levy Amount: Enter a maximum levy amount. This is an optional field; leave it blank to accept unlimited levy amounts.

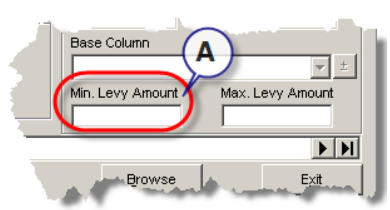
Note: This parameter accepts a negative value; so that you can generate a credit on *tax* bills. If you are entering a negative value, enter the number that will generate the maximum credit.

If the amount levied is greater than the maximum, this value is displayed in the **Total Net Tax** field on the Tax Assessment Maintenance function in Govern.

If a negative value is entered and the amount levied will generate a credit greater than the allowed maximum, the value entered in this field is displayed as a negative amount in the **Total Net Tax** field on the Tax Levy Maintenance function.

Note: This field is enabled for the Base * Rate Computation only.

Minimum Levy Amount: In this parameter, enter the minimum credit amount to be calculated. This parameter is an optional field; leaving it blank is an indication that there is no minimumlevy amount.



Exemption Codes

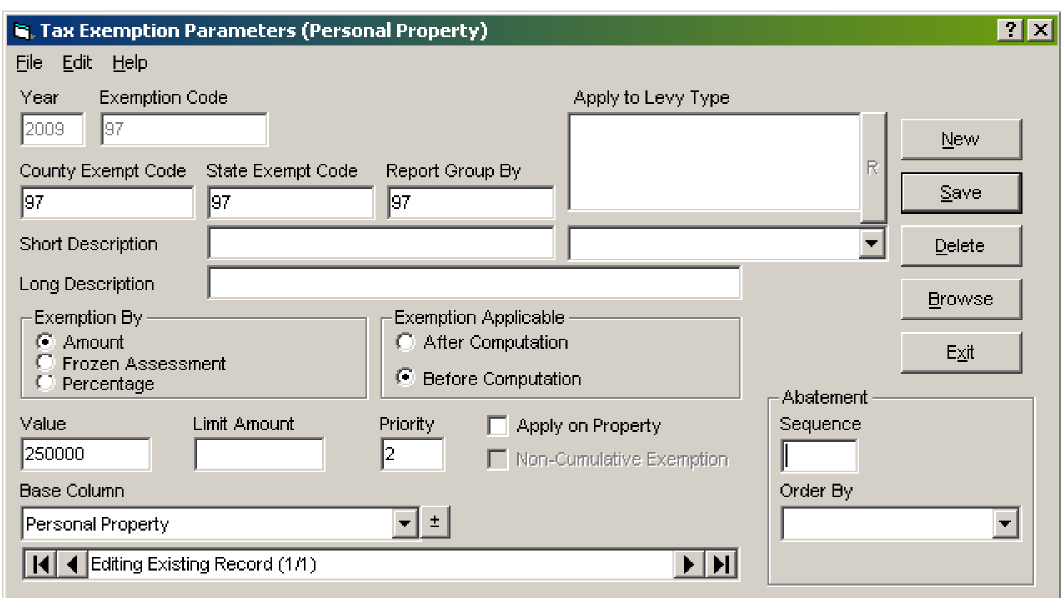
Overview

The *Tax Exemption Parameters (*Personal Property*)* form is used for creating and maintaining tax exemptions. Exemptions are applied to Levy Types and can be calculated either before or after the tax calculation. The amount can be limited.

To access this feature, from Govern's main screen, select **Tools** > **System Administration (Govadm32.exe)**

OR

Click the Admin icon then select *Parameters* > *Tax Billing* > *Personal Property* > **Exemptions Codes**



Viewing Tax Exemption Parameter Records: Each Tax Exemption Parameter setup is saved as a separate record. To view individual records use the right and left navigational arrows or click **Browse** to view a list of all the Personal Property *Tax Exemption Parameters*.

Creating an Exemption Code: To create a new exemption code, click **New** and enter the required information. The **Exit** button switches to **Cancel** so that you can delete new information without closing the form.

Saving an Exemption Code: Click **Save** to save a new exemption code or any modifications made to an existing one.

Deleting an Exemption Code: Click **Delete** to remove a levy code. A confirmation message is displayed. Click **OK** to continue or **Cancel** to return to the *Tax Exemption Parameters* form.

Exit: Click **Exit** to close the form. A confirmation message is displayed if there are any unsaved modifications. Click **Yes** to save your modifications. Click **No** to close the form without saving the new information or **Cancel** to return to the *Tax Exemption Parameters* form.

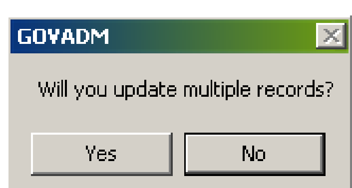
Year: The Year field displays the default fiscal year.

To change the default year, click on the year field on the Govern Toolbar; enter a new year in the text box and click **OK**. Alternately, you can click **File** > **Set Default Year**.

Tax Levy Parameters are saved by year, use this procedure to view the parameters for a different year.

Adding a Levy Type to the Tax Exemption: Select the Levy Type from the drop-down list to apply to this exemption (Table: VT_USR_LEVYTYPE).

Note: When you add a Levy Type to an existing exemption, a prompt is displayed asking you to confirm if you are updating multiple records:



If you click **No**, only the *ModifStamp* of the records for the current levy will be updated. The system recalculates the levies for the affected records only. If you click **Yes**, the PP_MODIF_STAMP table will be updated. The system recalculates all levies for all records.

Note: The prompt is displayed only if you have changed fields that affect the computation. It is not displayed for a closed year.

Removing a Levy Type from the Exemption Code: Select the Levy Type and click the **R** button to remove the Levy Type from this list box.

Exemption Code: Enter the exemption code to apply to this levy.

Jurisdiction: You can apply the exemption by jurisdiction, if **Support of Multiple Jurisdictions** is selected on the *System Registry Maintenance* form in Govern Admin. Select the jurisdiction to apply to the exemption from the drop-down list (Table: VT_USR_JURISD).

County Exemption Code: Enter a County Code. Typically, this is used for reports. For example, you can create your own codes as Levy Codes and if the County code is different from yours, County reports could be printed using this code instead.

State Exemption Code: Enter a State code. This code can be used for reporting. For example, if you want to use your own codes as Levy Codes and the state codes are different from yours, then the state reports could be printed using this code.

Report Group By: Enter a Group Name that will be used to group the reports together (i.e. the NY State Assessment Roll and the Tax Roll, groups the exemptions using this code).

Short Description: Enter a short description to be used for fast data entry and look-ups, if space is limited on forms.

Long Description: Enter a more detailed description to be displayed in look-ups, on forms and for reporting.

Apply to Levy Type: This field is enabled after you enter an **Exemption Code** and click **Save**. Select the Levy Type(s) to use with this code from the drop-down list. You can apply the same Exemption Code to many Levy Types (Table: VT_USR_LEVYTYPE).

Exemption by: There are three ways of applying the exemption, by Amount, Percentage or by a Frozen Assessment:

- **Amount**: Select this option if you would like to enter a flat exemption amount.
- **Frozen Assessment**: Select this option if you would like to 'freeze' a portion of the assessment. For example, suppose the assessment value is $100000, and you have chosen to enter a Frozen Assessment amount of $80000 (value can only be entered in Govern User). This means that the exemption would be $20000 for that year and in the years to follow and barring any modifications to this record, the exemption amount would equal the assessment amount minus this frozen amount.
- **Percentage**: Select this option if you would like to enter a percentage exemption amount.

Exemption Applicable: Select one of the following options:

- **After Computation**: Select this option to apply the exemption to the next tax.
- **Before Computation**: Select this option to apply the exemption to the selected Base Column.

Value: Enter the **Amount** or **Percentage** to apply to the exemption.

Limit Amount: This option is enabled only if **Percentage** is selected as the **Exemption By** type. Enter the maximum amount for the exemption.

If this field is left blank and the exemption is defined as **Before Computation**, the maximum assessment is used. If the exemption is defined as **After Computation**, the net tax is used.

Priority (for Computation): This option is used to specify the order in which the exemptions are calculated. The higher the number, the higher the priority; for example, four is calculated before one.

> **Note:** For entirely exempt properties such as religious organizations, charitable group properties, government property, etc., it is suggested that you create an exemption code such as *wholly exempt* defined as a percentage of 100% applied before computation, for these properties. Most state exemptions are primarily a reduction in assessment before computation. For those states where exemptions are a reduction in taxes due, such as in Massachusetts, it may be preferable to enter exemptions as abatements in the Accounts Receivable system.

Apply on Property: If select, the exemption is applied on the property and will not expire by automated functions such as the *Sales Data Entry.*

Non-Cumulative Exemption: By default, an exemption is cumulative; i.e., after a first exemption is applied, the second exemption is applied to the remaining amount. Select **Non-cumulative Exemption** to apply the exemption to the original amount.

> **Note:** This option is available only if **Exemptions By Percentage** or **Frozen Assessment** is selected.

Base Column: Select the Base Column to be used with the Levy Code (available only if the computation method is Base x Rate). If this field is left blank, the Total Assessment Value, VA_TOTAL_ASSMT is the default.

Creating a Base Column: To create a new Base Column, click the ± button. This opens the New Database Fields Creation form, where you can enter a new Base Column and label. The new column name is added to the assessment table, PP_ASSESSMENT and appears at the top left corner on the first tab of the Personal Property Assessment form in Govern. You can move it to any position using the **Object Dragging Mode** and change the label with the **Field Setup Mode** feature. These options are available from the **Setup** menu in Govern. Refer to the *Super User* guide for complete details.

Levy Groups

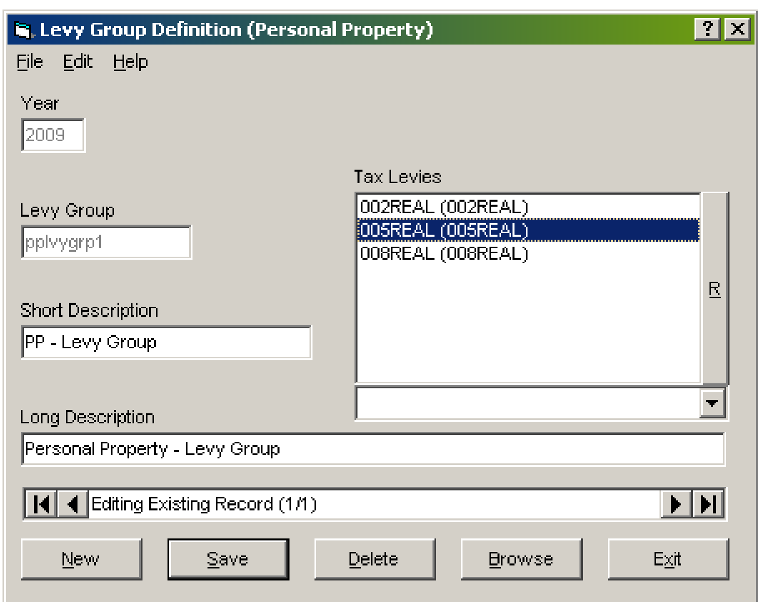
Overview

The Levy *Group Definition (*Personal Property*)* form is used for setting up and maintaining Levy *Groups*. The use of Levy *Groups* facilitates the selection of levies from the Personal Property Assessment form for the Govern user. Rather than selecting the required levies one by one, the user can select a group. The system then creates a record for every Levy in the group.

To access this feature, from Govern's main screen, select *Tools* > **System Administration (Govadm32.exe)**

OR

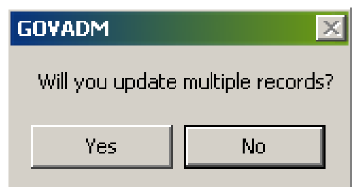
Click the Admin icon then select *Parameters* > *Tax Billing* > *Personal Property* > **Levy Groups...**



Viewing Levy Group Definition Records: Each Tax Levy Group is saved as a separate record. To view individual records use the right and left  navigational arrows or click **Browse** to view a list of all the Personal Property Tax Levy Groups.

Creating a Levy Group: To create a new Levy Group, click **New** and enter the required information. The **Exit** button switches to **Cancel** so that you can delete new information without closing the form.

Saving a Levy Group: Click **Save** to save a new Levy Group or any modifications made to an existing one. A prompt is displayed asking you to confirm if you are updating multiple records:



If you click **No**, only the *ModifStamp* of the records for the current Levy Group will be updated. The system recalculates the levies for the affected records only. If you click **Yes**, the PP_MODIF_STAMP table will be updated. The system recalculates all levies for all records.

Note: The prompt is displayed only if you have changed fields that affect the computation, such as rate computation method, base column or rate type. It is not displayed for a closed year.

Deleting a Levy Group: Click **Delete** to remove a Levy Group. A confirmation message is displayed. Click **OK** to continue or **Cancel** to return to the Levy *Group Definition* form.

Exit: Click **Exit** to close the form. A confirmation message is displayed if there are any unsaved modifications. Click **Yes** to save your modifications. Click **No** to close the form without saving the new information or **Cancel** to return to the *Tax* Levy *Group Definition* form.

Year: The Year field displays the default fiscal year.

To change the default year, click on the year field on the Govern Toolbar; enter a new year in the text box and click **OK**. Alternately, you can click **File** > **Set Default Year**.

Tax Levy Groups are saved by year, use this procedure to view the parameters for a different year.

Adding a Tax Levy to the Current Levy Group: This field is enabled only after you enter a Levy **Group** name and click **Save**. Select the tax levies that you want to include in the group, from the **Tax** levies drop-down list (Table: VT_USR_EXEMPTPP). A prompt appears when you add a Levy.

Click **Yes** to add the Levy to all the applicable properties. Click No to add the Levy to the selected properties only.

Removing a Tax Levy from the Current Levy Group: Select the Levy from the list box and then click the **R** button to remove a Tax Levy from the current Levy Group. A prompt appears when you remove a Levy.

Click **Yes** to remove the Levy from all the applicable properties. Click **No** to remove the Levy from the selected properties only.

Levy Group: Enter a name for the Levy Group. This name is referenced from the Personal Property Assessment form in Govern.

Short Description: Enter a short description to be used for fast data entry and look-ups if space is limited on forms.

Long Description: Enter a more detailed description to be used in look-ups, on forms and normally used for reporting.

Exemption Groups

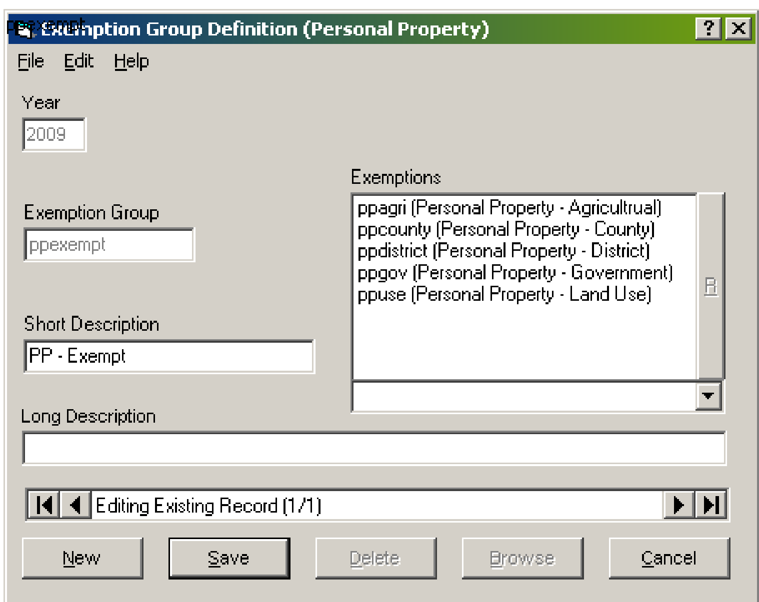
Overview

The Exemption *Group Definition (*Personal Property*)* form is used for setting up and maintaining Exemption *Groups*. The use of Exemption *Groups* facilitates the selection of levies from the Personal Property Assessment form for the Govern user. Rather than selecting the required levies one by one, the user can select a group. The system then creates a record for every Exemption in the group.

To access this feature, from Govern's main screen, select *Tools* > **System Administration (Govadm32.exe)**

OR

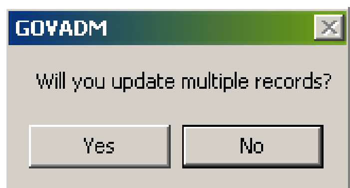
Click the Admin icon then select *Parameters* > *Tax Billing* > *Personal Property* > **Exemption Groups**



Viewing Exemption Group Definition Records: Each Exemption Group is saved as a separate record. To view individual records use the right and left navigational arrows or click **Browse** to view a list of all the Personal Property Tax Exemption Groups.

Creating an Exemption Group: To create a new Exemption Group, click **New** and enter the required information. The **Exit** button switches to **Cancel** so that you can delete new information without closing the form.

Saving an Exemption Group: Click **Save** to save a new Exemption Group or any modifications made to an existing one. A prompt is displayed asking you to confirm if you are updating multiple records:



If you click **No**, only the *ModifStamp* of the records for the current Exemption Group will be updated. The system recalculates the levies for the affected records only. If you click **Yes**, the PP_MODIF_STAMP table will be updated. The system recalculates all levies for all records.

Note: The prompt is displayed only if you have changed fields that affect the computation, such as rate computation method, base column or rate type. It is not displayed for a closed year.

Deleting an Exemption Group: Click **Delete** to remove a Exemption Group. A confirmation message is displayed. Click **OK** to continue or **Cancel** to return to the Exemption *Group Definition* form.

Exit: Click **Exit** to close the form. A confirmation message is displayed if there are any unsaved modifications. Click **Yes** to save your modifications. Click **No** to close the form without saving the new information or **Cancel** to return to the Exemption *Group Definition* form.

Year: The Year field displays the default fiscal year.

To change the default year, click on the year field on the Govern Toolbar; enter a new year in the text box and click **OK**. Alternately, you can click **File** > **Set Default Year**.

Exemption Groups are saved by year, use this procedure to view the parameters for a different year.

Adding a Tax Exemption to the Current Exemption Group: This field is enabled only after you enter a Exemption **Group** name and click **Save**. Select the tax levies that you want to include in the group, from the **Tax** levies drop-down list (Table: VT_USR_ PP). A prompt appears when you add a Exemption.

Click **Yes** to add the Exemption to all the applicable properties. Click No to add the Exemption to the selected properties only.

Removing a Tax Exemption from the Current Exemption Group:

Select the Exemption from the list box and then click the **R** button to remove a Tax Exemption from the current Exemption Group. A prompt appears when you remove a Exemption.

Click **Yes** to remove the Exemption from all the applicable properties. Click **No** to remove the Exemption from the selected properties only.

Exemption Group: Enter a name for the Exemption Group. This name is referenced from the Personal Property Assessment form in Govern.

Short Description: Enter a short description to be used for fast data entry and look-ups if space is limited on forms.

Long Description: Enter a more detailed description to be used in look-ups, on forms and normally used for reporting.

Jurisdiction: You can set up exemption groups by jurisdiction, if **Support of Multiple Jurisdictions** is selected on the *System Registry Maintenance* form in Govern Admin. Select the jurisdiction to apply to the exemption from the drop-down list (Table: VT_USR_JURISD).

Exemptions by Name

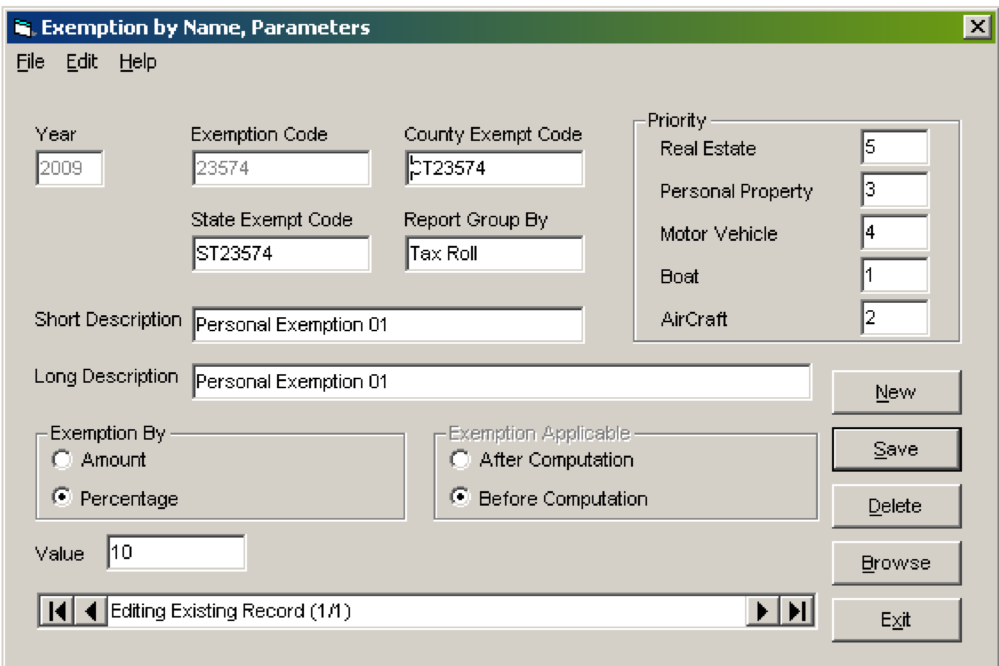
Overview

The *Exemptions by Name* form is used to set up exemption parameters to be applied by name. The exemption amount will be distributed according to the priorities set for the tax module. The exemption will be applied in full against the module with the highest priority, then to the module with the second highest priority and so on. In the following example, the exemption amount is $25,000.00 and this is to be applied to Personal Property and Real Estate. Personal Property is assigned a higher priority than Real Estate; the Personal Property assessment is $15,000.00 and the Real Estate is $20,000. $15,000.00 is applied to the Personal Property and $10,000 to the Real Estate.

To access this feature, from Govern's main screen, select *Tools* > **System Administration (Govadm32.exe)**

OR

Click the Admin icon  then select *Parameters* > *Tax Billing* > **Exemption by Name**



Viewing Exemption by Name Records: Each Exemption by Name setup is saved as a separate record. To view individual records use the right and left navigational arrows or click **Browse** to view a list of all the tables.

Creating a New Exemption by Name Record: To create a new record, click **New** and enter the required information. The **Exit** button switches to **Cancel**; so that you can remove new information without closing the form.

Saving an Exemption by Name Record: Click **Save** to save a new record or any modifications made to an existing one.

After creating an Exemption by Name record, you need to add the levy type through the *Exemption Codes* form.

1. Save the new Exemptions by Name, Parameters record.
2. In Govern Admin, select *Parameters* > *Tax Billing* > *Personal Property* > **Exemption Codes**.
3. On the *Tax Exemption Parameters (*Personal Property*)* form, click Browse, highlight the Exemption by Names record and click **Select**.
4. Select the Levy Type under **Add Levy Type**.

Note: All other parameters are disabled on this form.

5. Click **Save**.

Deleting an Exemptions by Name Record: Click **Delete** to remove an Exemptions by Name record. A confirmation message is displayed. Click **OK** to continue or **Cancel** to return to the *Exemptions by Name, Parameters* form.

Year: The Year field displays the default fiscal year.

To change the default year, click on the year field on the Govern Toolbar; enter a new year in the text box and click **OK**. Alternately, you can click **File** > **Set Default Year**.

Exemption by Name are saved by year, use this procedure to view the parameters for a different year.

Exemption Code: Enter an Exemption Code.

County Exempt Code: Enter a County Exemption Code.

State Exempt Code: Enter a State Exemption Code.

Report Group By: Enter a report group name. You can use this for the reports using the exemption code.

Short Description: Enter a short description. This is used for fast data entry and look-ups if space is limited on forms.

Long Description: Enter a long description. This displayed for look-ups, on forms and normally used for reporting.

Priority: Enter the priority level for distributing the exemption amount. The highest priority is 5, the lowest, 1. The highest priority is executed first.

Exemption By: There the exemption type:

- **Amount**: Select this option if you would like to enter a flat exemption amount.
- **Percentage**: Select this option if you would like to enter a percentage for exemption amount.

Exemption Applicable: This option is set to **Before Computation**. All Exemptions by Name are calculated before the computation.

Value: Enter a value for the amount or percentage.

Personal Property Inventory Grid Setup

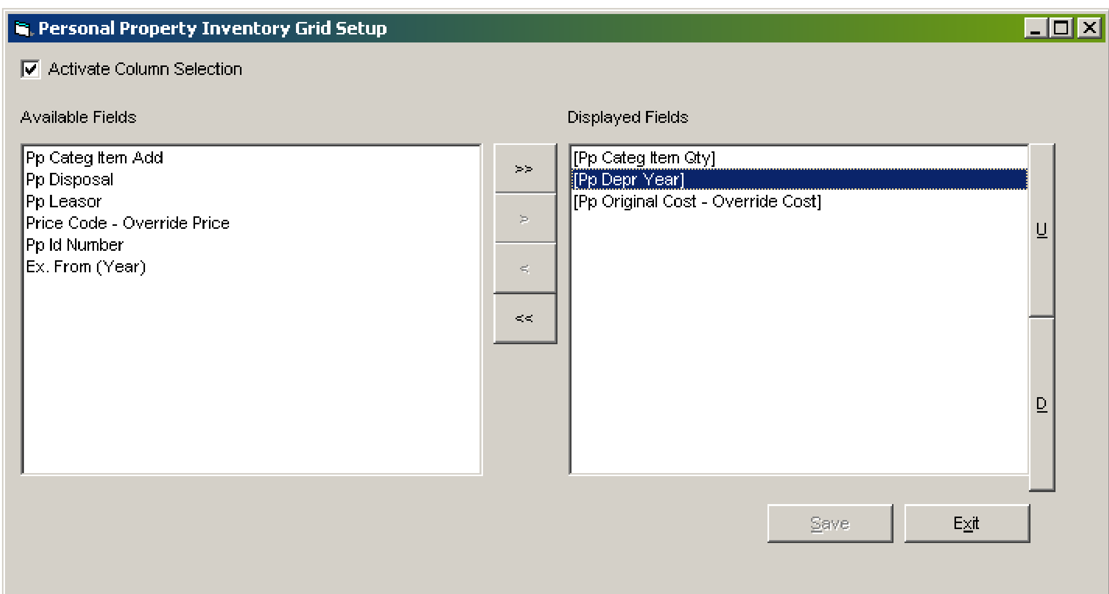
Overview

Use the *Personal Property Inventory Grid Setup* form to select the items that you want to display on the **Inventory** grid of the *Personal Property Assessment* function in Govern, and those that you want to hide from the display.

To access this form, from Govern's main screen, select *Tools* > **System Administration (Govadm32.exe)**

OR

Click the Admin icon then select *Parameters* > *Tax Billing* > *Personal-Property* > **Inventory Grid Setup**



The *Personal Property Inventory Grid Setup* form has two columns. The *Available Fields* are listed on the left and the *Displayed Fields* on the right.

There are three types of fields:

- **Fixed Mandatory Fields**

  - Categories
  - Items
  - Depreciations / Depreciation Override
  - Values
  - Exemption No. / Exemp. Override / Exempt. Amount / Exempt. Percentage / Exemp. From & To / Number of Month
- **Movable Mandatory Fields**
  - Quantity
  - Year
  - Cost / Cost Override
- **Optional Fields**
  - Additional Description
  - ID Number
  - Disposal
  - Lessor
  - Price Code
  - Adjustment Grade / Adj. Value / Adj. Override

The *Fixed Mandatory Fields* are not displayed. The *Movable Mandatory Fields* are listed in the **Displayed Fields** column in square brackets [ ] and can not be removed from that list. The *Optional Fields* are listed on the left.

To activate this feature:

1. Select the **Activate Column Selection** option

To add *Optional Fields* to the *Personal Property Tax Assessment* grid:

1. Highlight the fields in the **Available Fields** column that you want to display.
2. Click the single right arrow to move these fields to the **Displayed Fields** column. 

Tip: You can select multiple items, using the Shift or Ctrl keys, as applicable.

3. Click **Save**.

To add all the *Optional Fields* to the *Personal Property Tax Assessment* grid:

1. Click the double right arrow to move all the fields from the **Available Fields** to the **Displayed Fields** column. »
2. Click **Save**.

To remove *Optional Fields* from the *Personal Property Tax Assessment* grid:

1. Highlight the fields in the **Displayed** column that you do not need to display.
2. Click the single left arrow to move these fields to the **Available Fields** column. ‹

Tip: You can select multiple items, using the Shift or Ctrl keys, as applicable.

3. Click **Save**.

To remove all the *Optional Fields* from the *Personal Property Tax Assessment* grid:

1. Click the double right arrow to move all the fields from the **Displayed Fields** to the **Available Fields** column. »
2. Click **Save**.

To change the position of the fields in the grid:

1. Highlight the field you want to move.

Note: You can move only one field at a time.

2. Click the **Up** button to move the field to the left of the Personal Property Tax Assessment grid. U
3. Click the **Down** button to move the field to the right of the grid. D
4. Click **Save**.
5. Click **Exit** to close the grid.

See Personal Property - Assessment Maintenance on page 73, for details.

To deactivate this feature:

1. Deselect the **Activate Column Selection** option

Govern

CHAPTER TWO: USER

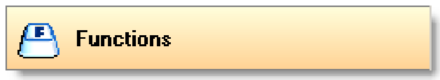
Overview

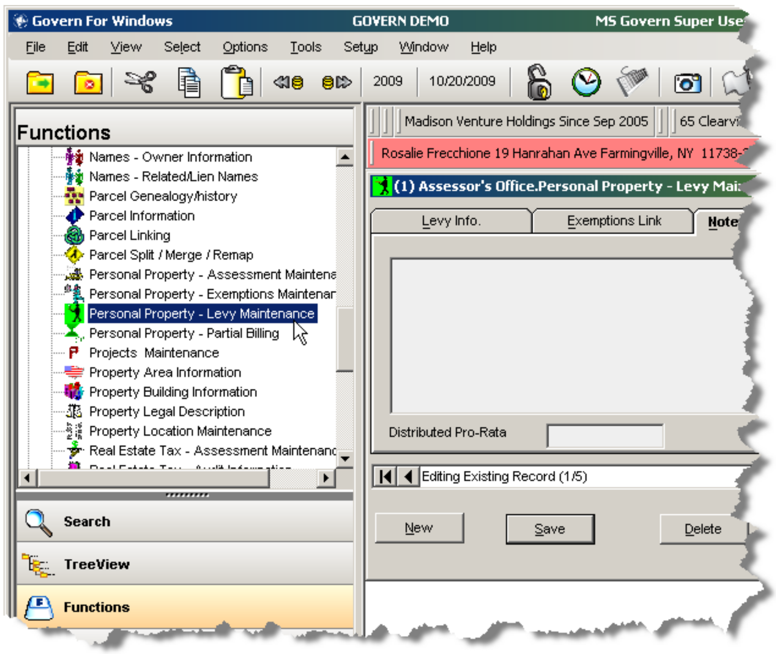
This section of this guide describes the forms and parameters that are normally completed and defined by the Govern user.

For details on the Govern graphical user interface, refer to the General Information guide.

To access any of the forms, open a record and:

1. Click **Functions** in the **Side Navigation Bar**.





2. In the *Treeview* area on the upper left hand side (LHS), select the **Personal Property function needed**.

Personal Property User Functions

Summary Record Card

The *Summary Record Card* is used for displaying the information on a selected parcel from all the available forms. From the displayed Summary Record Card you can open all the related forms and view and modify the details related to each function by clicking on the related icons. Only the functions with records will be displayed on this form. *See Summary Record Card on page 68*.

Personal Property Assessment Maintenance

The Personal Property *Assessment Maintenance* form is used for setting up and maintaining tax assessment information. Three tabs are included:

- **General** for recording general levy and assessment information
- **Inventory** for listing personal property items
- **Assessment** for displaying the total assessed values
- **Additional Information** for viewing consolidated tax and exemption rates
- **Exemption Group** for linking exemptions to the assessment record.

See Personal Property - Assessment Maintenance on page 73.

Personal Property Audit Information

The Personal Property Audit Information form is used for Personal Property records that have been put into historical mode. This function will also keep track of the *users name*, *dates*, *source codes*, and *notes* related to the record. *See Personal Property Audit Information on page 93 for details.*

Personal Property Levy Maintenance

The Personal Property *Levy Maintenance* form is used for creating and maintaining Personal Property levies. Before completing this form, you need to create a record in the Personal Property *Assessment Maintenance* form. You can enter the levy records manually or automatically by linking a *Levy Group* to the property. An unlimited number of levies can be entered and further defined as detailed or summarized. The taxable base and / or tax rate can be overridden and split districts can be entered. You need to manually assign each exemption, or exemption group. The exemptions are automatically linked to the levy only when both exist. Unlimited notes and comments can be included with each levy. *See Personal Property Levy Maintenance on page 97*.

Personal Property Exemption Maintenance

The Personal Property *Exemptions Maintenance* form is used for setting up and maintaining tax exemptions. The exemptions can be created and applied manually or by selecting an exemption group, previously set up in Govern Admin. The exemption amount is displayed if **Amount** is selected in the **Exemption By** field on the *Exemption Codes* form in Govern Admin. If **Percentage** is selected in this field, the value displayed is equal to **(Total Assessment x Percentage)**, up to the **Limit Value** entered. *See Personal Property Exemptions Maintenance on page 114*.

Exemption by Name

The *Exemption by Name* form is used to create exemption codes that will be linked to a specific name. An associated exemption is created for each sub-system set up in Govern Admin. *See Exemptions by Name on page 111*.

Partial Billing

The Personal Property *Partial Billing Data Entry* form is used to handle omitted assessments, erroneous assessments, court orders and apportionments. A partial billing can be executed only after a posting has been made. In the following example, the client has received a bill and noticed a mistake. The taxation officer must make the necessary changes and request that the bill be re-posted. The Tax Receiver will use this function to request a new tax bill computation. *See Personal Property Partial Billing on page 117*.

Common Buttons in Govern

The following buttons and features appear on all the Personal Property forms in Govern.

Viewing Records: Each completed form is saved as a separate record. To view individual records use the right and left navigational arrows or click **Browse** to view a list of all the records.

Browsing Records: Click **Browse** to open the *Browsing* screen and view a list of all the records associated with the current form. Highlight the applicable record and click **Select**.

In Govern, the *Browsing* screen can be customized to include any specified field. Refer to the *Super User* guide for details. You can also perform the following:

- **Sort**: Click on a column heading and then click **Sort** to change the order of the listed records.
- **Copy**: Highlight a record and click **Copy** to copy the record to the clipboard.
- **Find**: Click on a column heading and click **Find**. Then enter the applicable information to search for a record in the list. The first match will be highlighted.
- **Next** and **Previous**: Depending on the number of records, and the administrative setup, you can view the next set of records, or to return to the previous set, by clicking **Next** or **Previous**.
- **Print**: Click the printer icon to open the *Print* dialog box and select a printer for the record list.

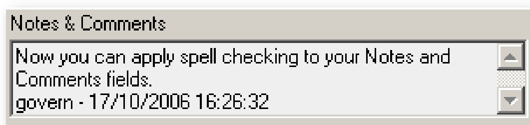
Creating a Record: To create a new record, click **New** and enter the required information. The **Exit** button switches to **Cancel** so that you can delete new information without closing the form.

Saving a Record: Click **Save** to save a new record or any modifications to an existing one.

Deleting a Record: Click **Delete** to remove a levy code. A confirmation message is displayed. Click **OK** to continue or **Cancel** to return to the current form.

Exit: Click **Exit** to close the current form. A confirmation message is displayed if there are any unsaved modifications. Click **Yes** to save your modifications. Click **No** to close the form without saving the new information or **Cancel** to return to leave the form open.

Notes and Comments: The *Notes and Comments* field provides unlimited space for entering additional information on the current record.

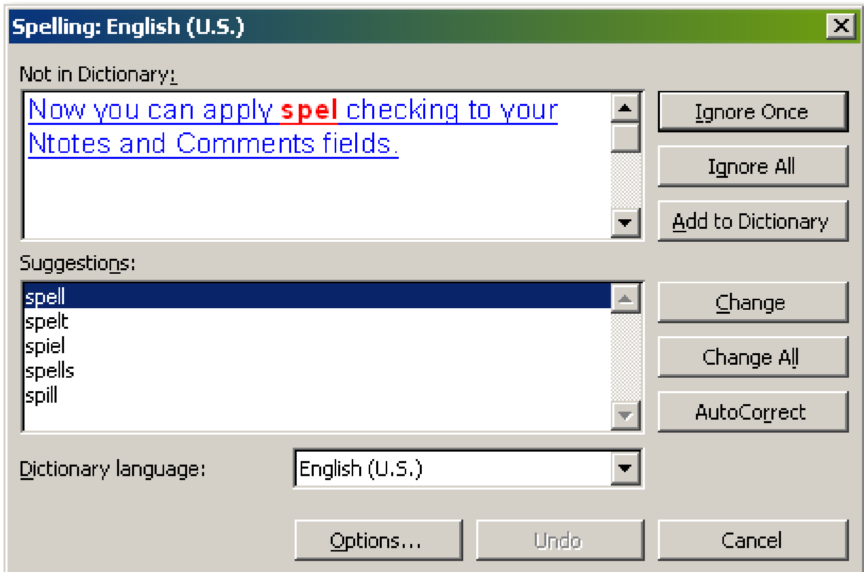


The user name and current date can be added to the Notes and Comments fields, if the **Add User Name and Current Date in Notes** option is selected on the *System Registry Maintenance* form in Govern Admin.

You can expand the space for creating and viewing information in a *Notes & Comments* field, by double-clicking anywhere in the text box. This opens the current *Notes & Comments* fields in a secondary window.

Spell Check: You can apply spelling verification to the *Notes and Comments* fields on all functions for which the required setup has been applied. *Refer to the Super User guide for details on the setup.* Then select **Options** > **Spell Check** from the main Govern menu bar.

When this option is selected, Microsoft® Office Word's spell checker is activated when you click **Save** or hit the **Enter** key.



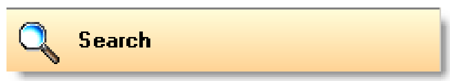
This option may be turned on or off, as required.

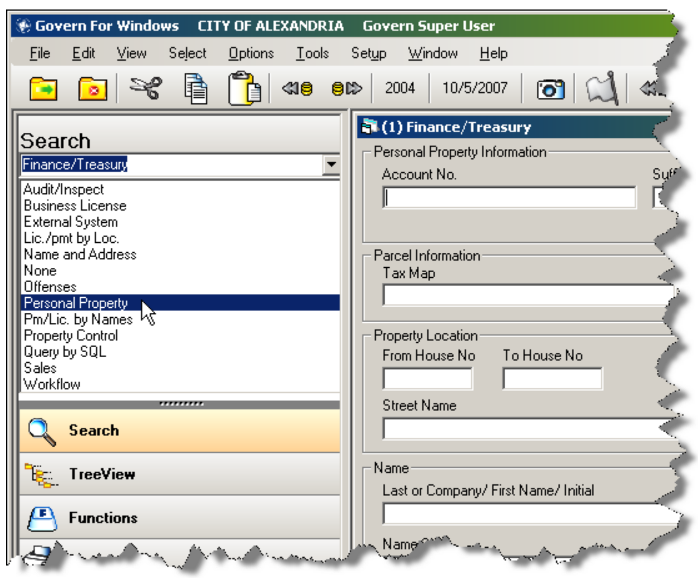
Search

Use the *Name and Address Search* form to locate any Personal Property Excise Tax record. You can search by several options including Account Number, Business Name or Address.

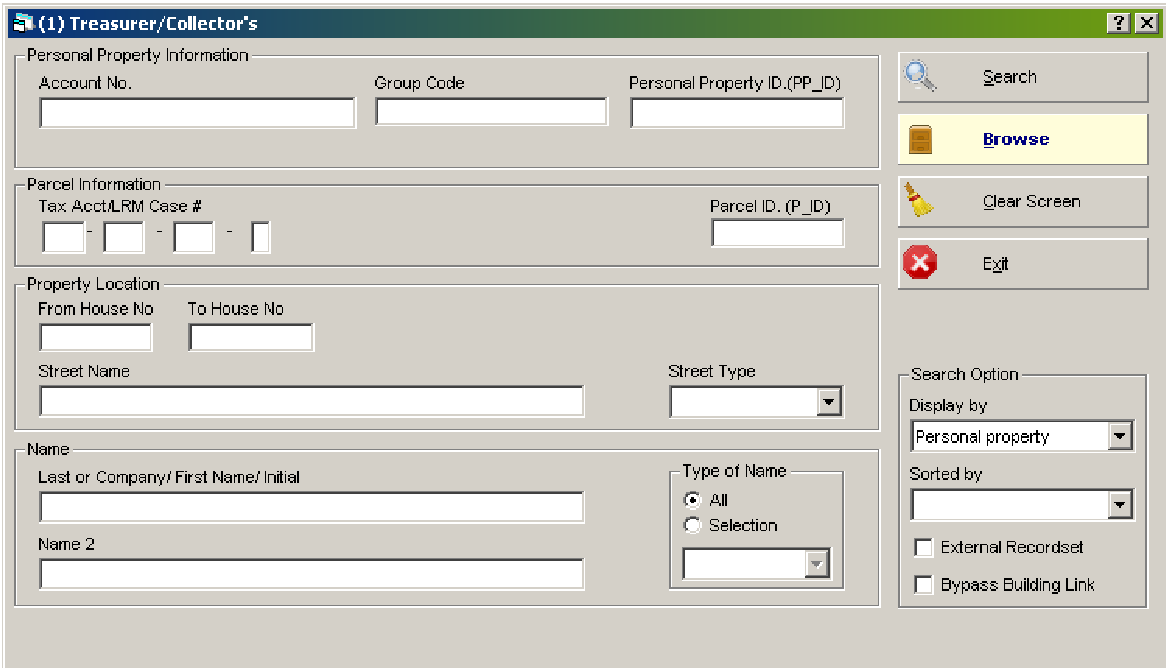
To open the *Personal Property* search form:

1. Launch Govern.
2. Click **Search** in the **Side Navigation Bar**.





3. In the *Treeview* area on the upper left hand side (LHS), select **Personal Property**.



Searching for a record: Enter the applicable information and click **Search**. If you leave all the fields blank, the first record in the set is displayed.

Note: The wild card (*) is not supported in the ORACLE environment.

Browsing Personal Property Excise Tax Records: Click **Browse** to launch the *Browsing* screen and browse through all the Personal Property Excise Tax Records. Highlight the applicable record and click **Select**.

The *Browsing* screen can be customized to include any specified field. Refer to the *Super User* guide for details. You can also perform the following:

- **Sort**: Click on a column heading and then click **Sort** to change the order of the listed records.
- **Find**: Click on a column heading and click **Find**. Then enter the applicable information to search for a record in the list. The first match will be highlighted.
- **Copy**: Highlight a record and click **Copy** to copy the record to the clipboard.
- **Next** and **Previous**: Depending on the number of records, and the administrative setup, you can view the next set of records, or to return to the previous set, by clicking **Next** or **Previous**.

- **Print**: Click to open the *Print* dialog box and select a printer to print the record list.

Exit: Click **Exit** to close the form.

Personal Property Search Parameters

Personal Property Information group

Account Number: Enter the full or partial Account Number for the Personal Property Excise Tax record.

Suffix: Enter a suffix such as Sr, Jr or III, if applicable

Personal Property ID (PP_ID): Enter the Personal Property ID. This is made from the NA_ID and the PP_ID (Table: PP_ ASSESSMENT).

Parcel Information group

Tax Map Number: Enter the tax map number for the search.

Parcel_ID (P_ID): Enter the Parcel Identification number for the property.

Property Location group

From / To House Number: Enter a range of house or civic numbers.

Street Name: Enter the full or partial street name.

Street Type: Select the Street type option.

Name group

Last or Company / First / Initial: Enter the name of the individual or company, associated with the sale.

Name 2: Enter any kind of related information, such as a spouse's name.

Type of Name (All or Selection): Select **All** to search through all name records or **Selection** to limit the search to a specific type of name, Company, Individual or No Format.

Search Option group

Display by: Select one of the options to display the result by:

- Name Personal
- Property
- Tax Map

Sorted by: Select one of the options to sort the result by:

- Account No.
- Business Address
- Business Name
- Tax Map

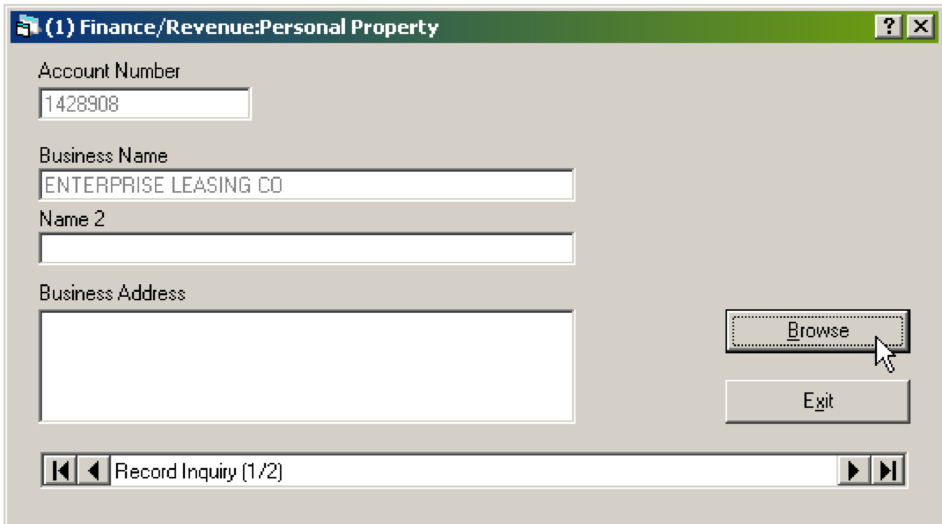
External Recordset: Select this option to use data from an external recordset.

Bypass Building Link: A normal search will search for the individual property address or address range specified. It is also possible to have multiple addresses in a building, therefore you can broaden your search by searching within the property location.

To search for the *Property Location*...:

1. In *Govern for Windows,* select a department with access to personal property records.
2. Click **Search** in the *Side Navigation Bar* (**SNB**).
3. Select *Personal Property* from the *Search* pane.
4. In the *Search Option* group, select **Bypass Building Link**.

Personal Property Search Result Screen



Personal Property Search Result Command Buttons

Browse: Click **Browse** to view a list of the returned Personal Property Excise Tax records. *See Browsing Personal Property Excise Tax Records on page 64 for details on using the Browsing screen options*.

Exit: Click **Exit** to close the search screen.

Personal Property Search Result Parameters

Account Number: This field displays the account number associated with the current record.

Business Name: This field displays the name associated with the current record.

Name 2: This is the information entered on the **Name Line 2** field on the *Name and Address Maintenance* form. This could be any kind of related information, such as a spouse's name.

Business Address: This field displays the address associated with the current record.

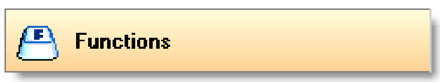
Summary Record Card

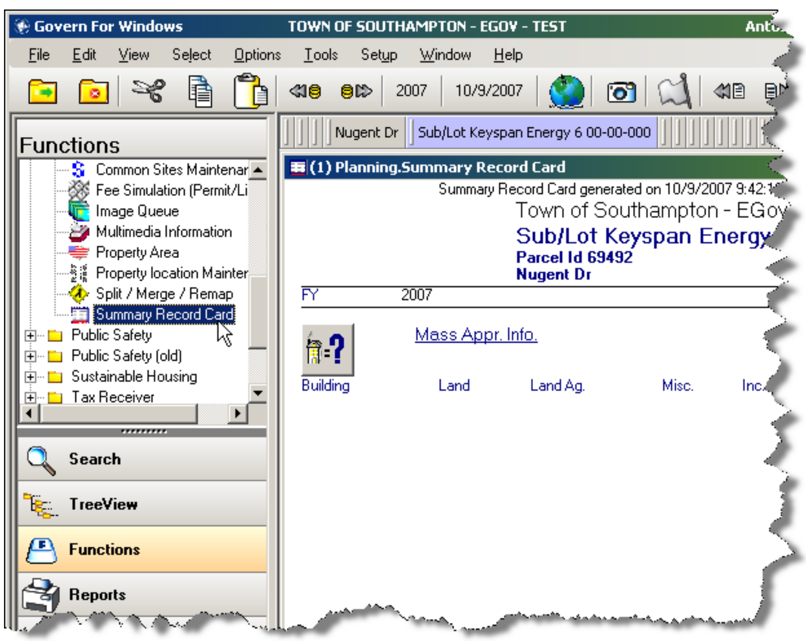
Overview

The *Summary Record Card* displays the information from all the functions used within the department. You can click on an icon to open the function and view the details or make modifications.

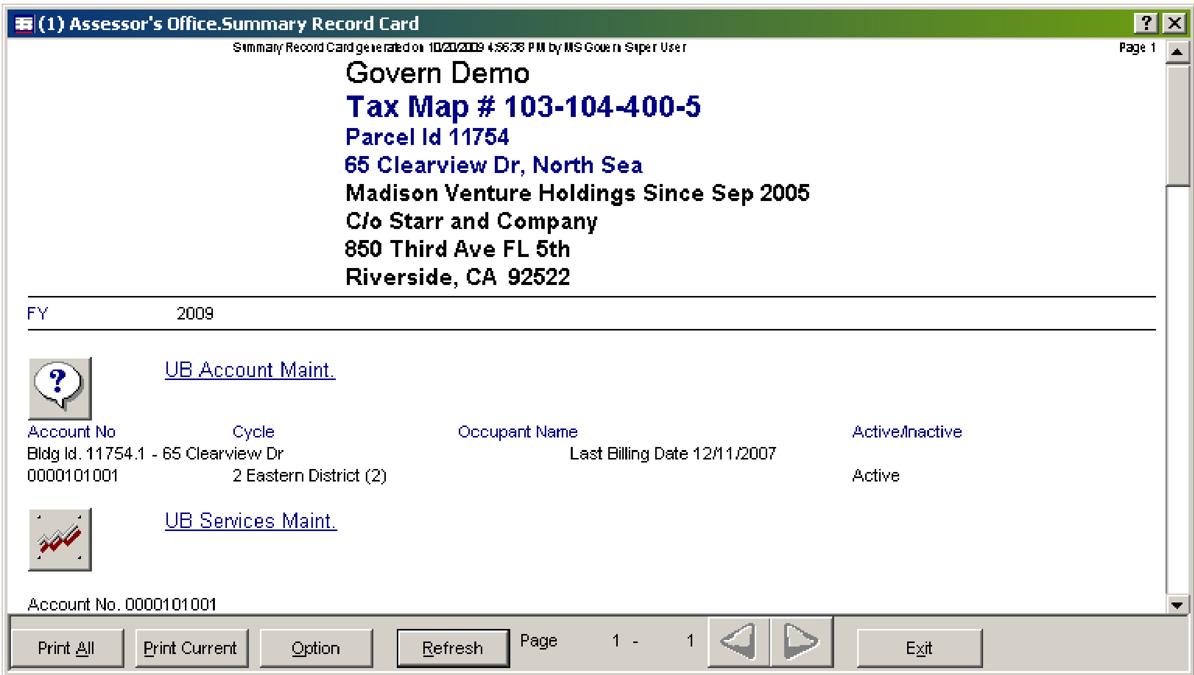
To access this function select a record and:

1. Click **Functions** in the **Side Navigation Bar**.





2. In the *Treeview* area on the upper left hand side (LHS), select **Summary Record Card**.



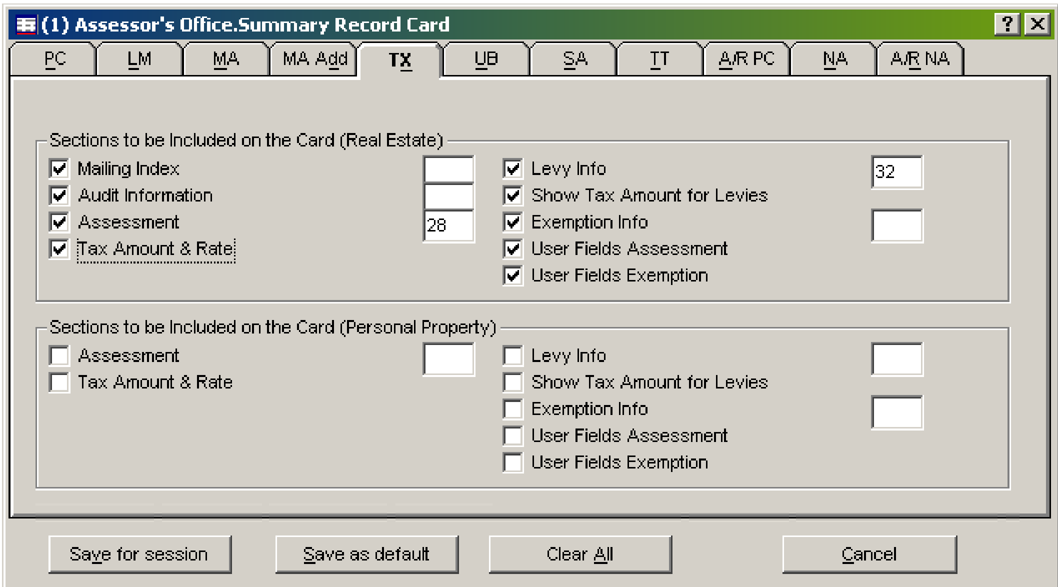
Printing all Summary Record Card Information: Click **Print All** to print the pages containing data on any parcels in the current recordset.

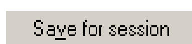
Printing Current Summary Record Card Information:

Click **Print Current** to print the pages containing information on the current parcel only.

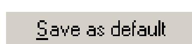
Selecting Options to Include on the Card: Click **Option** to select the functions and options you want to display on the form. *See Sections to be included on the Card on page 70 for details*.

Refreshing the Data: Click **Refresh** to update the Summary Record Card with the latest data if any modifications were made after the card was opened.





Save for Session: Click **Save For Session** to use the Summary Record Card setup for the current session only.



Save as Default: Click **Save As Default** to use the **Summary Record Card** setup for the current session and subsequent sessions but for the current user only.

Clear All: Click **Clear All** to clear all *Priority Sequence Numbers*. *See Setting Priority Sequence Numbers on page 71 for further details*.

Cancel the Record Card Setup: Click **Cancel** to delete unsaved modifications.

Sections to be included on the Card

For definitions of the Real Estate Tax options, refer to the *Real Estate Tax Assessment & Billing guide*.

To display Personal Property Tax options on the Summary Record Card:

1. Select the **TX** tab.

2. Select the functions you want to display, from the following list.

Option		Function
Assessment		**Personal Property Tax Assessment Maintenance**. *See Personal Property - Assessment Maintenance on page 73.*
Levy Info		**Personal Property Tax Levy Maintenance**. *See Personal Property Levy Maintenance on page 97.*
Exemption Info		**Personal Property Tax Exemption Maintenance**. *See Personal Property Exemptions Maintenance on page 114*.

3. Select the options to display, from the following list:
    - **Tax Amount & Rate**: Select this option to display the consolidated tax rate from the *Personal Property Tax Assessment Maintenance* function and also the total taxes.
    - **Show Tax Amount for Levies**: Select this option to display the tax rate and amount of the levies.
    - **User Fields Assessment**: Select this option to display the fields added by the user to the Personal Property Tax Assessment Maintenance function.
    - **User Fields Exemption**: Select this option to display the fields added by the user to the Personal Property Tax Exemption Maintenance function.
4. Enter a *Priority Sequence Number* for each selected item. This number defines the order the option is displayed on the card.

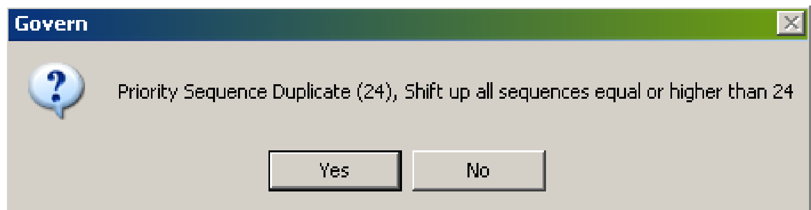
Setting Priority Sequence Numbers

Enter a value in the text box to the right of each Personal Property Tax item for the priority sequence number. The item with the lowest priority sequence number is printed first; for example, one is printed before two.

Note: If *Priority Sequence Numbers* are not entered, they are automatically generated when you click **Save for Session** or **Save as Default**.

Note: The Priority Sequence is set for all items from all modules on the card.

If you enter the same Priority Sequence Number for more than one option, the following prompt appears:



Click **Yes** to increase the priority sequence values as indicated or click **No** to return to the *Summary Record Card* and enter a new value for the current option.

Personal Property - Assessment Maintenance

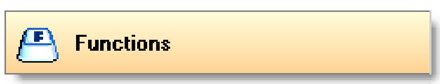
Overview

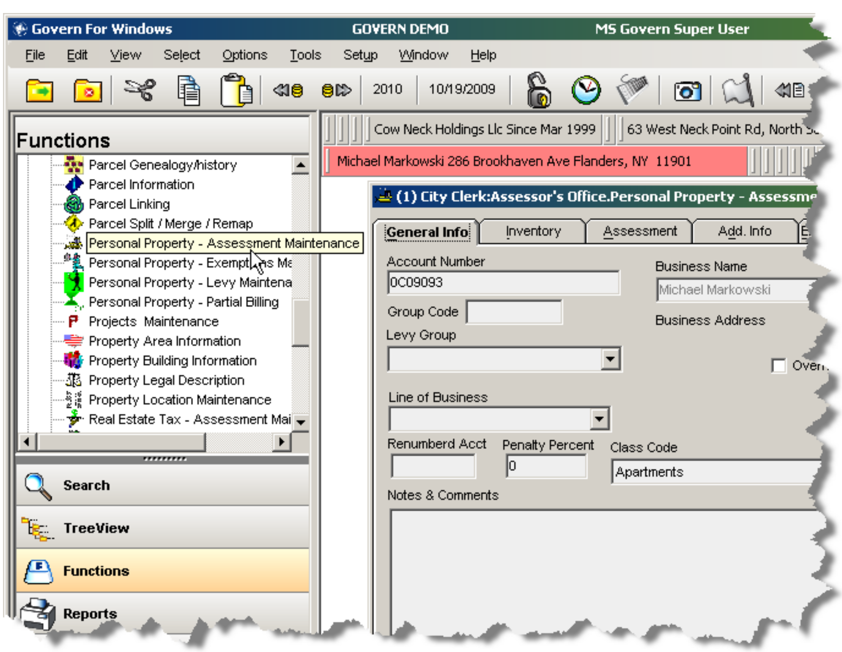
The Personal Property *Assessment Maintenance* form is used for setting up and maintaining tax assessment information. Five tabs are included:

- **General** for recording general levy and assessment information
- **Inventory** for listing personal property items
- **Assessment** for displaying the total assessed values
- **Additional Information** for viewing consolidated tax and exemption rates
- **Exemption Group** for linking exemptions to the assessment record.

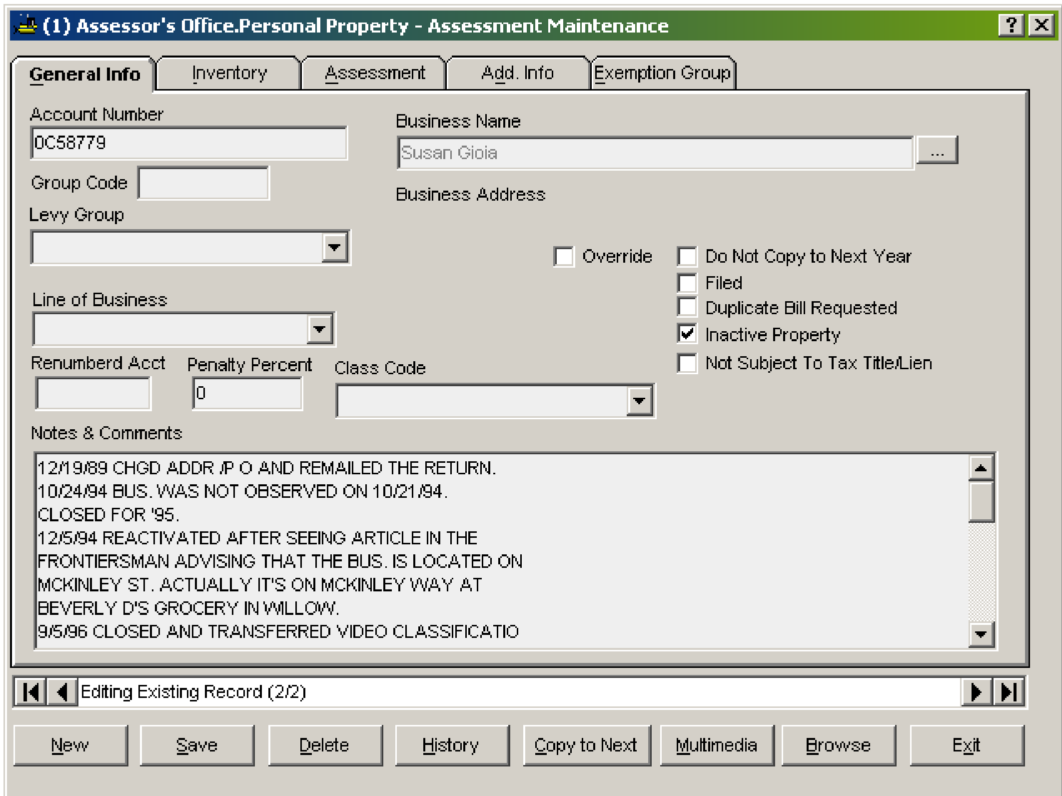
To access this form, select a record and:

1. Click **Functions** in the **Side Navigation Bar**.





2. In the *Treeview* area on the upper left hand side (LHS), select **Levy Maintenance**.



Assessment Maintenance - Command Buttons

Viewing Historical Taxes: Click **History** to display a list of all the records for the current property, including records from previous years. the *Browsing* screen and view all the records related to the current property.

Note: You can add and remove columns on the Browsing screen linked to the History and Browse buttons to display only the information you need. *Refer to the Super User guide for details*.

Copying to Next Year: Click **Copy to Next** to copy the current tax assessment information from one year to the next.

Assessment Maintenance - General Info Tab

Account Number: Enter the account number to use with this record. Each account number is unique and can also be entered as search criteria.

Business Name: Click **...** to open the *Name Search* screen and select the applicable *Occupant* or *Business* name to apply to the current record. You can also create a new name. *Refer to the Property Control guide for more information on the Name Search screen*.

Note: For billing purposes, the address is linked to this name through the *Name & Address* function.

Group Code: This field displays the code of the *Name Sharing Group* that created the records. A *Name Sharing Group* is used to provide full access rights to the name and address records, created by one department, to one or more of the other departments, within an organization.

Business Address: This field displays the business address corresponding to the business or occupant name.

Levy Group: Select the **Levy Group** from the drop-down list to apply to this record. These Levy Groups need to be previously-defined in Govern Admin (Table: VT_USR_TXCODEPP). *See Levy Groups on page 42 for details*.

Class Code: Select the **Property Class Code** from the drop-down list to apply to the current record (Table: VT_USR_PUSE).

A/R Bill Number: If the **Manual Bill Number** option is selected on the Personal Property *General Parameters* form, the user can enter the bill number. This is useful if customers want the same bill number year after year.

Override for Assessment Totals

Override: When selected, you are able to manually enter an assessment value in the **Total** parameter under the *Assessment* tab.

Do Not Copy to Next Year: Select this option to exclude the current property when you run the final *Copy to Next Year* process from the *Tax Levy & Exemption Computation* form in Govern Batch Processing.

Filed: Select **Filed** to indicate the record has been filed.

Duplicate Bill Requested: Select this option to send a duplicate of the bill to the current individual or company. Once the batch *Bill Printing* process is run, this field is automatically deselected.

Inactive Property: Select this option to indicate the current property is temporarily inactive. The option can be deselected when the property or business becomes active or functional again.

Not Subject to Tax Title / Lien: Select this option to indicate the current property or business record is not subject to tax title or lien. *Refer to the Tax Title / Lien Maintenance guide for more information*.

Effective Date: Enter the starting date of the partial billing period.*See Pro-rate Partial Billings in the Assessment Maintenance Function on page 90 for additional details.*

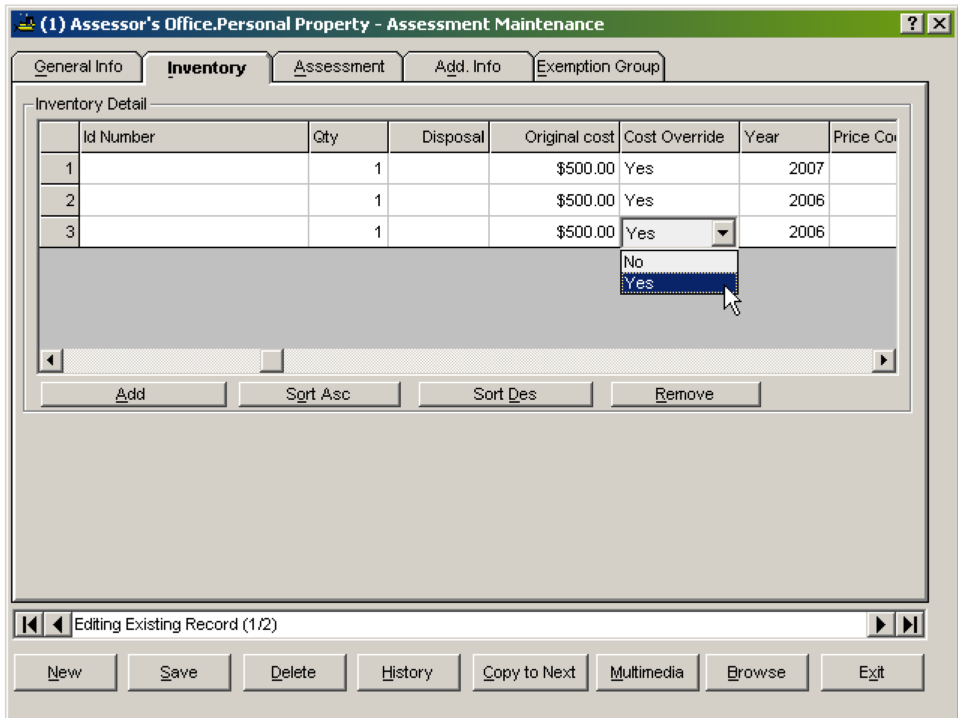
Not Subject to Partial Billing: Select this option to exclude the record from the current partial billing process. *See Pro-rate Partial Billings in the Assessment Maintenance Function on page 90 for additional details.*

Notes & Comments: This field provides unlimited space for notes and comments.

Assessment Maintenance - Inventory Tab

Select the **Inventory** tab to display a list of the personal property items to add to the record.

Note: This tab is enabled only if the **Using Appraisal** option is selected on the Personal Property *General Parameters* form.



Note: If you are creating a new record, you must enter the new values directly on the grid.

Note: You can navigate from one column to the next using shortcut keys in the grid section of this function. Click **F12** to move to the right and **F11** to move to the left.

Add: To add a personal property item to the form, click **Add**. This adds a new line to grid. Fill in the required information as described below.

Remove: Highlight the record you want to delete and click **Remove**.

Sort: You can sort by any column, in order to locate specific articles more easily. Highlight the column and click **Sort**.

Note: The sort is performed on the first character of the listed items; therefore, items are displayed in ascending order of first character; for example, airplanes, boats, cars... 1, 2, 3... However, 5, 15, 25 are displayed as 15, 25, 5.

The system administrator can add and remove certain fields from the **Inventory** grid of the *Personal Property Tax Assessment* grid.

There are three types of fields:

- Fixed Mandatory Fields
    - Categories
    - Items
    - Depreciations / Depreciation Override
    - Values
    - Exemption No. / Exemp. Override / Exempt. Amount / Exempt. Percentage / Exemp. From & To / Number of Month
- Movable Mandatory Fields
    - Quantity
    - Year
    - Cost / Cost Override
- Optional Fields
    - Additional Description
    - ID Number
    - Disposal
    - Lessor
    - Price Code
    - Adjustment Grade / Adj. Value / Adj. Override

Category: This column displays the categories created on the Personal Property *Categories* form in Govern Admin. For each category, an assessment value is stored in VA_AS_XXX and an appraisal value is stored in VA_AP_ XXX.

Item: This column contains the items that were set up through the Personal Property *Items* form in Govern Admin. The sum of the items for each category is calculated and stored in VA_AP_XXX. You can also enter new items manually.

Additional Description: Enter additional information on the article to a maximum of 50 characters.

ID Number: Enter an ID number for the item. For example, This field can hold an equipment serial number or bar code.

Qty: This column contains the quantity for each item in the inventory. To determine the **Appraised Value**, stored in VA_AP_XXX, this number is multiplied by the **Original Cost** value.

Original Cost: This column displays the cost of each item, at date of purchase. If this is defined on the *Personal Property Item* form in Govern Admin, it is displayed by default. Otherwise, it can be entered manually.

Cost Override: Left-click in this field and select **Yes** to indicate the displayed cost represents a modified value or **No** to indicate this is the original value.

Year: This column displays the year for each item. This value is used to determine the number of elapsed years and the corresponding depreciation value.

Price Code: This code is defined in Govern Admin and it is used as a reference (Table: VT_USR_PPCOSTCD).

Price Override: Left-click in this field and select **Yes** to indicate the displayed *Price Code* has been modified or **No** to indicate this is the original *Price Code*.

Lessor: Left-click in the field and select **Yes** if the selected name is the lessor of the item. Otherwise, select **No**.

Override: Left-click in the field and select **No** to use the displayed *Depreciation* value or **Yes** to modify it.

Depr $: The depreciation value is equal to the quantity of items multiplied by the original cost, then multiplied by the depreciation rate.

The depreciation rate can be looked up in the depreciation table for the number of elapsed years between the year entered for the items and the **Depreciation Year** entered on the Personal Property *General Parameters* in Govern Admin.

Value: This field displays the total appraised value for this category, calculated as follows.

(Qty x Original Cost) x ((100 - Depreciation Rate) / 100) = Value

Note: The system calculates the depreciation rate (percentage value) from the depreciation table defined for the number of elapsed years.

Exemption by Item: You can create an exemption for each item on the *Personal Property Assessment* grid. When you create an exemption for an item, an exemption record is automatically created on the *Tax Exemption Maintenance* function. *See Personal Property Exemptions Maintenance on page 114*.

*The following fields are now included on the **Inventory** grid of the Personal Property Assessment function:*

Exemption Number: Selects the Personal Property Exemption to apply to the item or leave the field blank if no exemption is to be applied.

Note: If the same exemption applies to two or more items, only one exemption record is created. The total value for all exemptions is displayed.

Exemption Override: Select **Yes** to override the default exemption parameters. Then, enter either the amount or percentage value. This field can be left blank or set **No** to use the default parameters, with no override.

Exemption $: If you are overriding the exemption, you need to enter an amount or percentage.

Exemption %: If you are overriding the exemption, you need to enter an amount or percentage.

Exemption From Year: Enter the first year the exemption is valid.

Exemption To Year: Enter the last year the exemption is valid.

Note: When exemptions are copied to the following year, this exemption is copied if the year is still valid.

Number of Months: Enter the number of months to prorate the exemption, within the year. Leave this field blank if the exemption is not prorated.

Note: You can enter a maximum of 12 months.

Note: The *Number of Month* fields will be reset to blank when copy to next year.

Personal Property Works by PP_ID for Tax Exemptions

Prior to release 10.5, the keys used for the PP_LEVY_MASTER table included the P_ID, NA_ID, YEAR_ID, and FROZEN_ID. In release 10.5, modifications were made to the PP_LEVY_MASTER table. The keys used by this table now includes the PP_ID. The combination of the P_ID and NA_ID still equate to a PP_ID.

Note: This change is internal to the system. Users of release 10.5 and greater with reports that access the PP_LEVY_MASTER will not experience any issues.-

User Modifications recorded in Assessment Table

Release 10.5 saw changes made to the PP_ASSESSMENT_DET table that allows administrative users to recall modification details of records in the *Personal Property* tables. The following two (2) columns, LAST_MODIF_UID, retains the information of the last user, and LAST_MODIF_DATEkeeps the date that the table was modified for each record.

Note: This change is internal to the system, and can only be accessed by users with administrative privileges. In order to obtain the modification information, an SQL query, or a custom report will need to be created.

Inventory Detail Grid Example

This example illustrates the procedure for completing the **Inventory Detail** grid of the *Personal Property Maintenance* function. This is a simple example for a small business, listing only two categories and four items. These are defined in Govern Admin through the *Personal Property Categories* and *Personal Properties Items* forms.

Category	Description	Quantity	Original Cost ($)	Year	Value ($)
Inventory	Computer	15	1,500.00	2003	22,500.00
Miscellaneous	Chair	25	100.00	2005	2,450.00
Miscellaneous	Desk	20	1,500.00	2000	29,400.00
Inventory	Trucks	3	47,500.00	2001	136,800.00

1. In the first step, the Govern user selects the Category by left-clicking in the **Category** column and selecting an item from the drop-down list.
2. Next the user selects an Item from the **Description** column; such as **Computer** in the first line.
3. The user enters the number of each item, owned by the business, **15** in our example.
4. The **Original Cost** is automatically displayed using the value defined in the *Personal Property Items* form.
5. Enter the year the item was built or use the value from the *Items* table.
6. The **Value** field is automatically displayed and is calculated as follows:

Value = (Qty x Original Cost) x (100 - Depreciation Rate) / 100)

The **Depreciation Rate** is based on the *Rate per Number of Elapsed Years* as defined in the *Personal Property Depreciation Tables* created in Govern Admin:

The *Number of Elapsed Years* is calculated by subtracting the year, entered for the item, in the **Year** field, from the **Depreciation Year**, entered on the *Personal Property General Parameters* form.

The Depreciation Year is the number from which Depreciation Values are calculated.

In this example, there is no depreciation value for the *Computer* category, since the number of elapsed years is zero:

Elapsed Years = (Depreciation Year = 2003) – (Year = 2003) = 0

Value = (15 * 1,500) x ((100 - 0) / 100) = 22,500

However, for the *Trucks* Category:

Elapsed Years = (Depreciation Year = 2003) – (Year = 2002) = 2
Based on the Depreciation Tables, the rate for 2 elapsed years is 4%
Depreciation = (3 x 47,500) x 4% = 5,700
(3 x 47,500) x ((100 - 4%) / 100) = $136,800

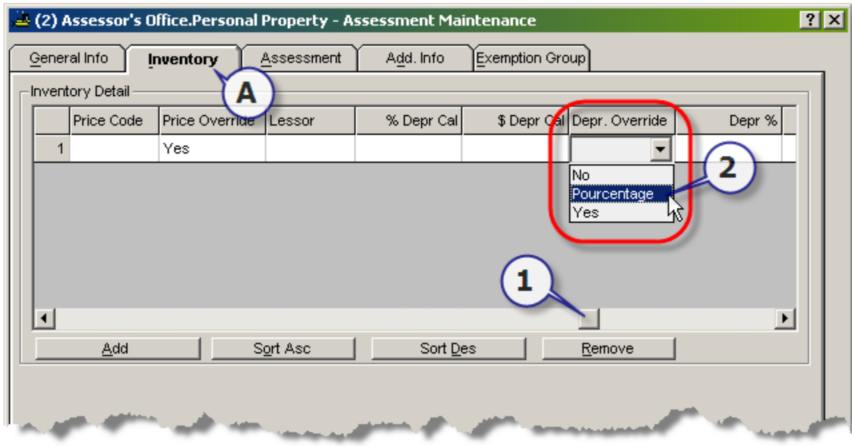
Depreciation Override as Percentage (%) in Personal Property Assessment

Previous versions of *Govern* had an override option for *Personal Property* depreciation. In release 10.5, you were able to specify that override amount as a percentage value. (Table: VT_SY_YESNOPR).

To specify an override amount as a percentage (%)...

1. In *Govern for Windows,* select a department and perform a *Personal Property* search.
2. In the *Side Navigation Bar* (**SNB**), click **Functions**.
3. Click to select the **Personal Property - Assessment Maintenance** function.
4. In the *Assessment Maintenance* form click to select the **Inventory** tab.
5. Scroll through the *Inventory Detail* grid and you will see the depreciation override (**Depr. Override**) column.

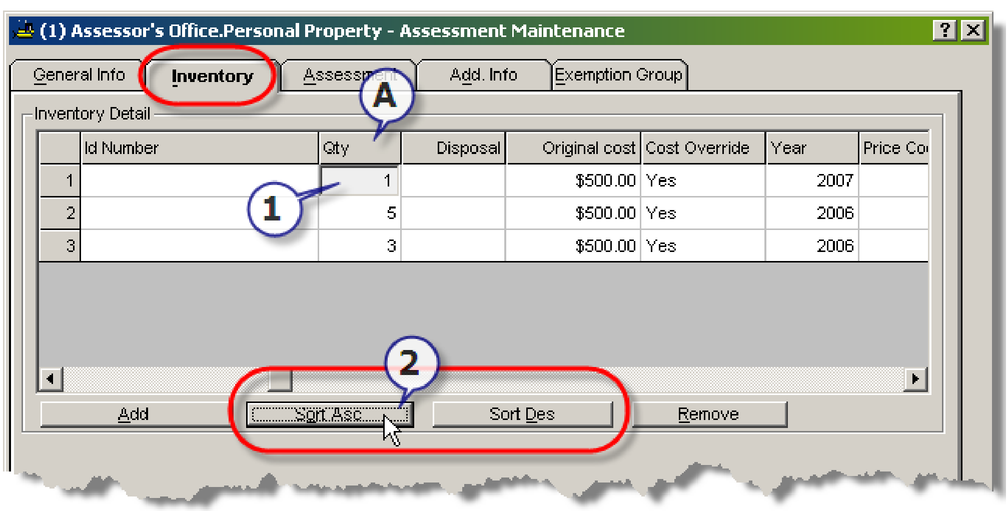
6. Click in the grid to access the drop-down menu; select **Percentage**.



When the *Percentage* is selected, you can enter an override amount in terms of percentage (%).

Ascending / Descending Sort in Assessment Maintenance Inventory Tab

The *Inventory Details* list under the *Inventory* tab of the **Personal Property - Assessment Maintenance** form can be sorted in ascending/descending order.



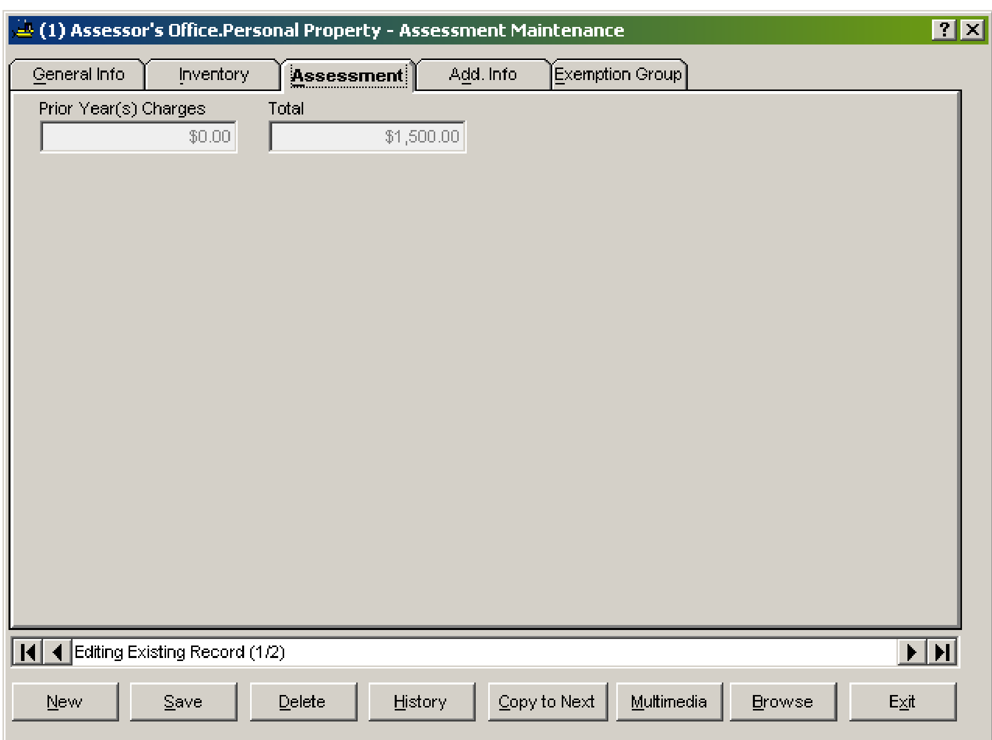
To sort the inventory list by a column heading in ascending or descending order...

1. Select the *Personal Property - Assessment Maintenance* function under **Functions** in the *Side Navigation Bar* (**SNB**).
2. In the *Personal Property - Assessment Maintenance* form select the inventory tab.
3. Click to select a cell under the column heading that you would like to sort by.
4. Click **Sort Asc** to sort the table data in ascending order by that column; click **Sort Des** to sort in descending order.

Assessment Maintenance - Assessment Tab

Select the **Assessment** tab to view or enter the values for each Personal Property category.

Note: If the **Using Appraisal** option is selected on the Personal Property *General Parameters* form in Govern Admin, the total values are automatically displayed. If it is deselected, you need to enter the values manually.



The total of the items selected in the **Inventory** grid is displayed for each category.

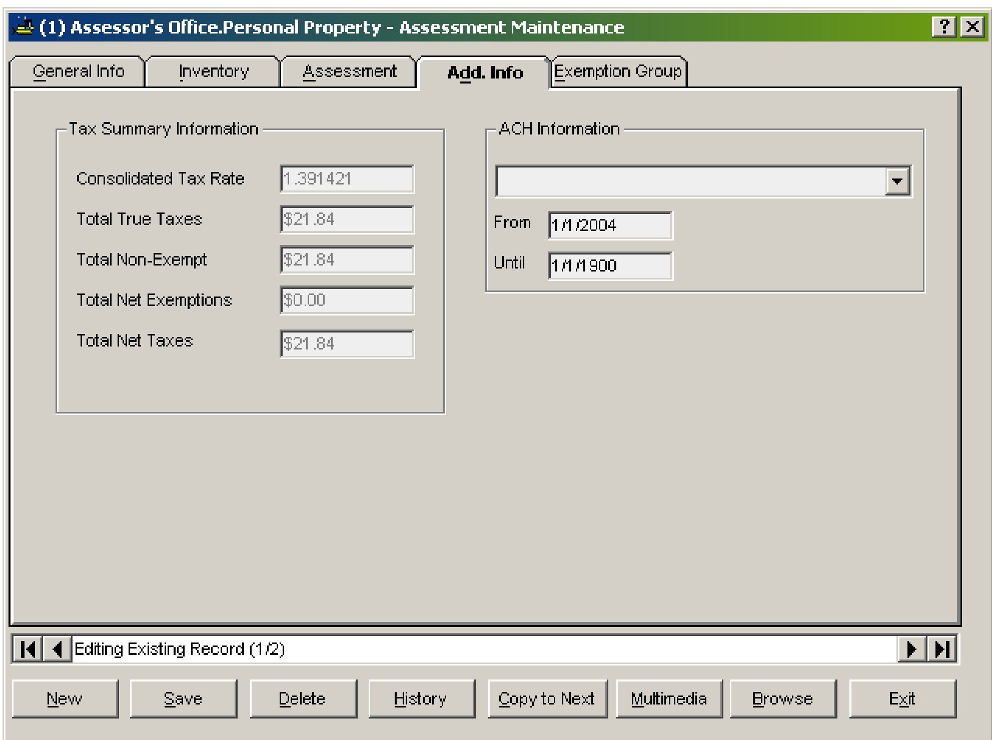
Prior Year(s) Charges: This field displays the total of the unpaid charges for the previous years.

Total: The total of items for all categories is displayed in the Total field.

The value of specific items may not be included in the total. In addition, certain categories may not be displayed on the Assessment tab, depending on the setup in Govern Admin. *See Categories and Items on page 24 for details*.

Assessment Maintenance - Additional Information Tab

Select the **Add. Info** tab to view the Tax Summary Information.



Tax Summary Information

Consolidated Tax Rate: This field is displayed only if all previous taxes were computed with the **Base x Rate** type and applied on the same Base Column.

Total True Taxes: This field displays the total tax to pay with no exemptions and no charges.

Total Non-Exempt: This field displays the total of all taxes calculated in the Levy function as well as all possible charges.

Total Net Exemptions: This field displays the total of all exemptions calculated in the Levy function.

Total Net Taxes: This field is calculated as

Total Net Taxes = (Non-Exempt) – (Total Net Exemptions)

Estimated Taxes: This field displays a value if the **Use Estimated Tax** option is selected on the Personal Property *General Parameters* form in Govern Admin.

The estimated tax process calculates the net taxes due based on the previous year's values.

If the case where the client receives quarterly billings, the first two estimated quarters will be based on half of the previous year's net Ad Valorem actual tax. The system will then distribute this amount equally between the first and second quarter billing. The third and fourth quarter billing will be based on the new tax rate and will use the following formula to calculate the actual tax:

Assessed Value * New Tax Rate = Actual Amount Due (Total)
(Actual Amount Due (Total) – First Half Payment) / 2 = 3rd and 4th Quarter payments due

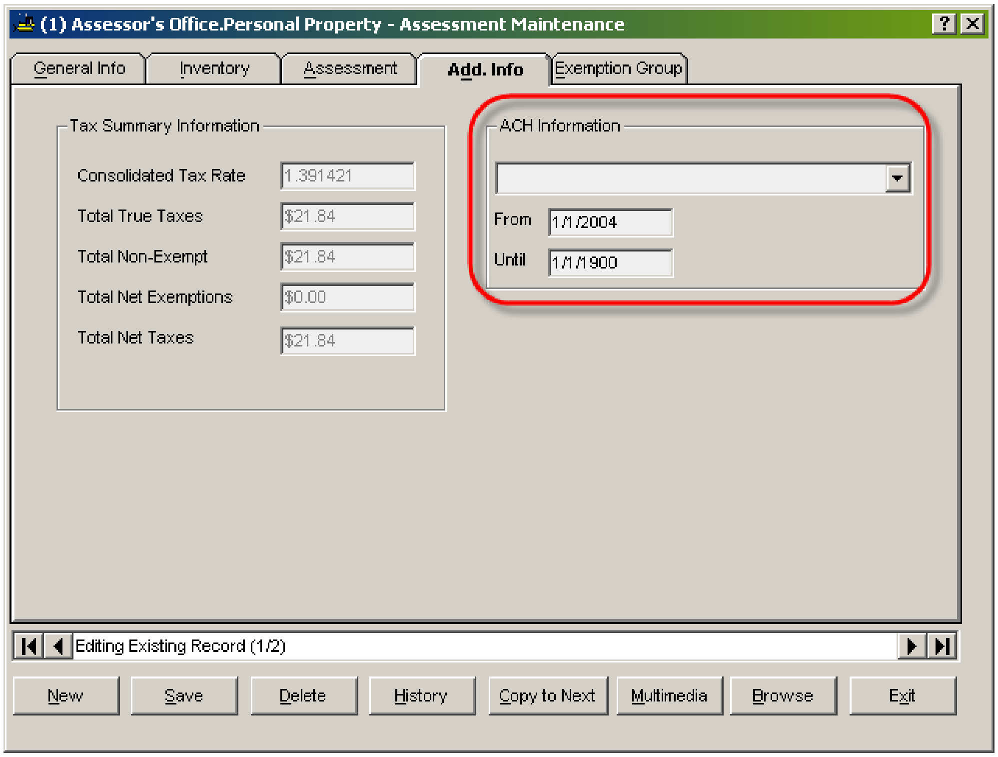
Note: The estimated tax process can also be set up for clients with two billings.

ACH Information

The *Personal Property Assessment Maintenance* function includes an **ACH Information** section. You can now select an account and enter dates to start and / or end ACH payment processing, if applicable.

To set up ACH payment for Personal Property Taxation:

1. In Govern, select a record for the applicable name.
2. Launch the *Personal Property Assessment Maintenance* function.

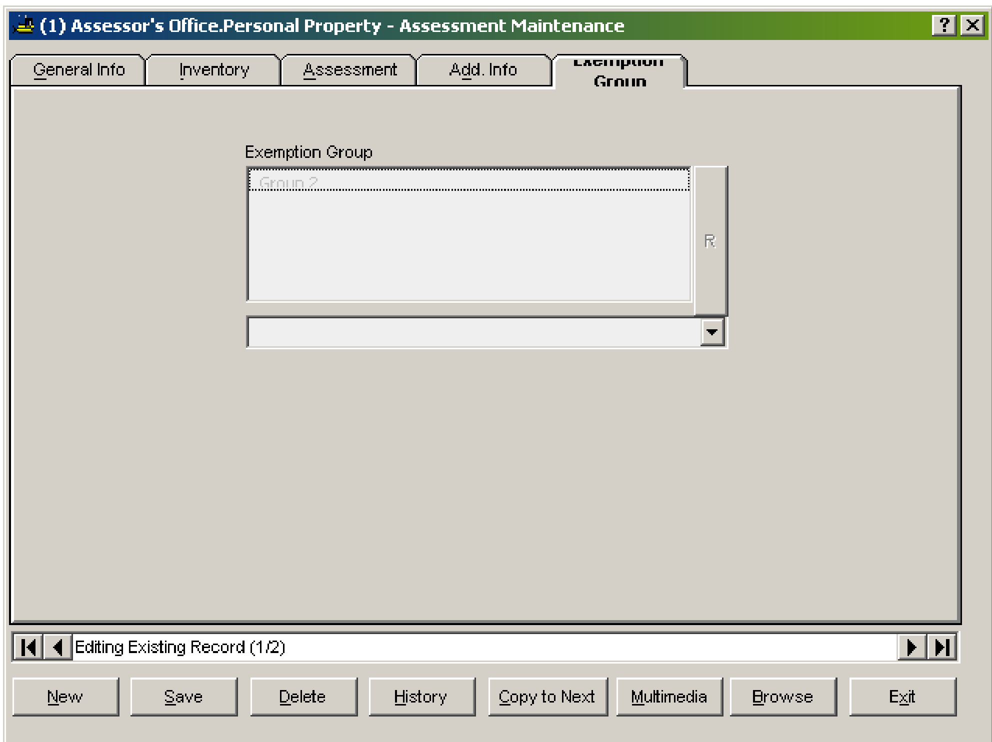


3. Under **ACH Information**, select the account to be used for ACH payments.
4. Enter a date to start ACH payment processing, if applicable.
5. Enter a date to end ACH payment processing, if applicable.
6. Click **Save**.

For more information on ACH Processing, refer to the Accounts / Receivable guide.

Assessment Maintenance - Exemption Group tab

Select the **Exemption Group** tab to select an exemption group to apply to the record.



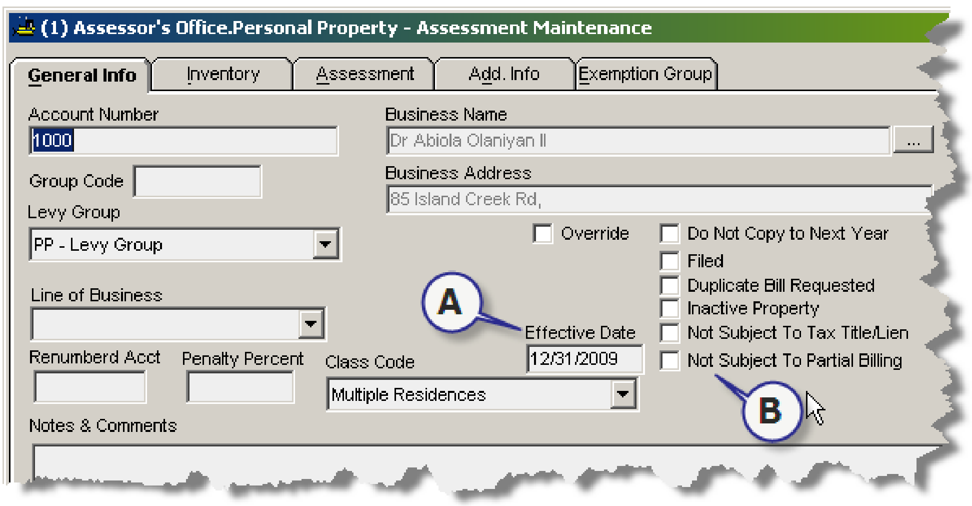
Note: The **Exemption Groups** need to be previously set up as described in the Administrator section. *See Exemption Groups on page 45 for details*.

Select an **Exemption Group** from the drop-down list. The levies will be linked to all the exemptions listed in the group.

Pro-rate Partial Billings in the Assessment Maintenance Function

The ideal Personal Property scenario is one in which a new business or account, is created right at the beginning of each billing cycle, and can therefore be billed at the end of the cycle. Unfortunately, the real world is not ideal. Partial billings may be required for various reasons. Currently, the system will allow for a simple correction, i.e. after an annual bill has been generated. In release 10.6 and above, with the introduction of an *Effective Date* parameter you can specify the date that the assessment is to occur from when a change is required.

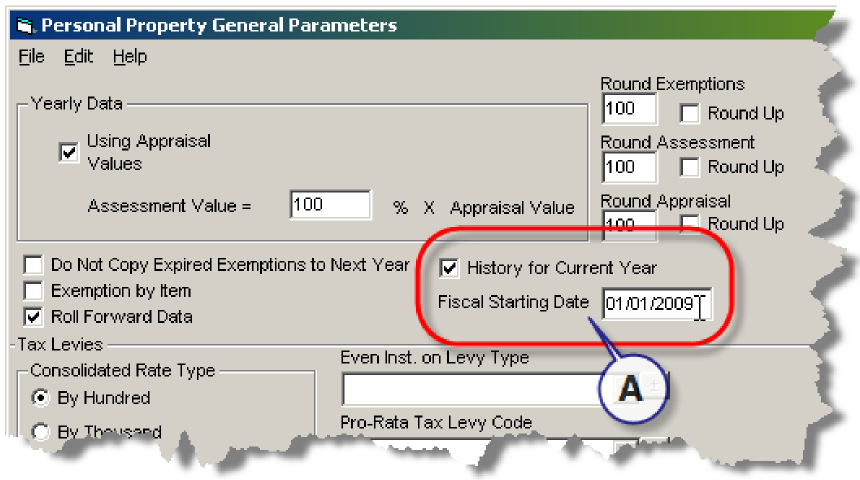
There are two (2) parameters in the *Personal Property Assessment Maintenance* form, **Effective Date** and **Subject to Partial Billing**. These two parameters will allow you to enter an effective date for your personal property record, and specify if the record is to be excluded from the partial billing process.



The Effective Date parameter (**A**) is enabled in the *History for Current Year* option is set in *Govern Admin*. *See History for Current Year Option and Frozen Records on page 8 for details.*

Calculation Details

The *Fiscal Starting Date* is used to calculate the ending date needed for the pro-rate calculation. The year is not critical because *Govern* will take the month and the date entered in the *Fiscal Starting Date* parameter of the *Personal Property General Parameters* form, and *Govern's* current year, then add one (1) year to calculate the *End Date*.



Example: If the entered *Fiscal Starting Date* is 1/1/2009, the *End Date* will be 1/1/2010. Therefore a *Personal Property* account created on 12/20/2009, will be billed from 12/20/2009 until 1/1/2010 (exclusive), a total period of 12 days.

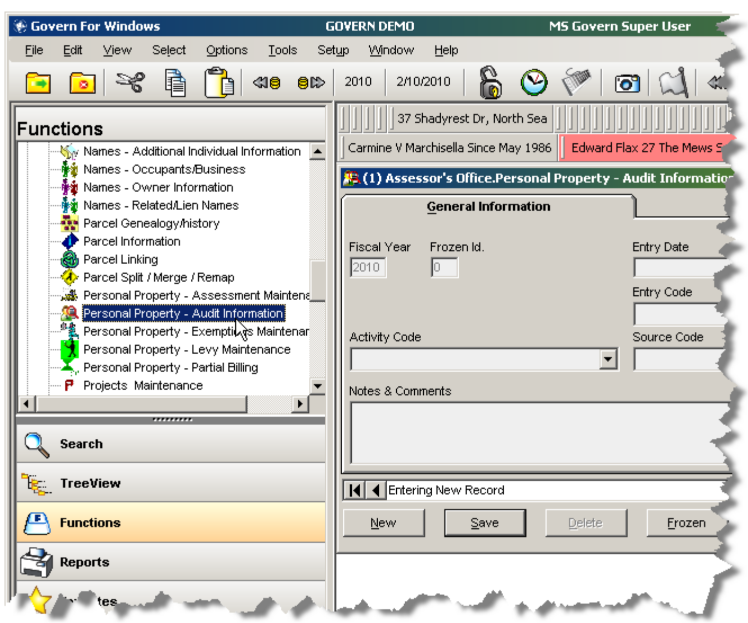
Personal Property Audit Information

Overview

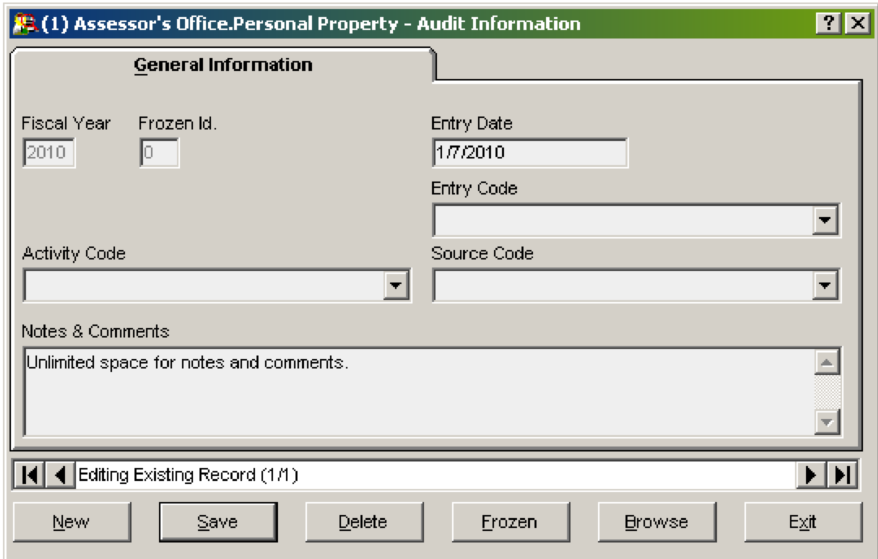
The Personal Property Audit Information form is used for Personal Property records that have been put into historical mode. It is used to record any changes made to the personal property assessment or billing information, the activity code, and the date and person who made the change. The personal property data is frozen, so that it is always possible to view or compare the data prior to the change (Table: PP_AUDIT_INFO).

To access this form, select a record and:

1. Click **Functions** in the *Side Navigation Bar*.



2. In the *Treeview* area on the upper left hand side (*LHS*), select the **Personal Property - Audit Information** function.



Personal Property Audit Information - Command Buttons

New: Click **New** to reset the function; so that you create a new record.

Save: Click **Save** to save a new record or modifications to an existing one. (Table:TX_AUDIT_INFO table).

Delete: Click **Delete** to remove the current record. A confirmation message appears. Click **OK** to continue.

Browse: Click Browse to browse through available Personal Property records.

Exit: Click **Exit** to close the function. A confirmation message appears if there are any unsaved modifications.

Frozen: To freeze the active record, click **Frozen**. Freezing a record is like taking a snapshot of it. Once a record is frozen, you can view the property data, as it was at the time it was frozen, in all the Govern functions, by selecting the frozen ID of the record from the Browsing screen of the Audit Information function. Then, selecting the Frozen button.

A zero appears in the Frozen ID text box until the record is frozen. Once it is frozen, a *Frozen ID* is automatically assigned. The automatic *Frozen IDs* start at –2 and decrease by one each time the property record is frozen.

The **Frozen ID** is displayed with the year the record was frozen, in the Year field on the Govern Toolbar:

You can customize the appearance of this field.

To modify the foreground and background colors:

1. Select *Options* > **CoolBar Customization** on the *Govern* menu.
2. Click in the *Foreground* parameter next to the *Year Past* parameter.
3. Select a color from the Color palette and click **OK**.
4. Click in the *Background* parameter.
5. Select a color and click **OK**.
6. Click **OK** on the *CoolBar Customization* screen.

Refer to the General Information guide for more information.

If the **History for Current Year** option is selected on the Taxation General Parameters form, you can view the frozen property data in the current year. Otherwise, you need to shift to Historical Mode.

To view data in Historical Mode:

1. Select the year parameter on the *Govern Toolbar*.
2. Enter the year the record was frozen in the textbox.
3. Click **OK**. The word *History* with the historical year appears on the *Govern CoolBar* and the year parameter displays the historical year.

You can also customize the appearance of this parameter, by following the procedure for changing the appearance of the Frozen ID field but scrolling to the Prior Year Message field.

To select the Frozen ID:

1. Click **Browse** on the Audit Information (Tax) function.
2. Highlight the applicable Frozen ID. This is the automatically generated number and will be -2 or less.
3. Click **Select** on the Browsing screen.

The *Frozen ID* appears in the *Frozen ID* parameter of the *Personal Property - Audit Information* function.

To view other property data, click **Frozen**. You can then open the other functions to view the records as they were before being frozen.

Personal Property Audit Information - Parameters

Fiscal Year: This field displays the default fiscal year for the department.

Frozen ID: The default *Frozen ID* is 0, indicating the record is in current mode. The first time you freeze the record, the ID –2 is assigned. The IDs decrease by one each subsequent time you freeze the record, -3, -4, -5 and so on.

Entry Date: Double-click in the Entry Date field and select the date of the audit from the pop-up calendar.

Entry Code: Select the reason for the audit from the Entry Code drop-down list; for example, court order, small claim or resolution (Table: VT_USR_TXENTRY).

Activity Code: Select an activity code, from the drop-down list, to identify what took place during the audit; for example, apportionment (Table: VT_USR_TXACTV).

Source Code: Select the audit information source code from the drop-down list; for example, tape or manual (Table: VT_USR_TXINFSRC).

Notes & Comments: This field provides unlimited space for notes and comments.

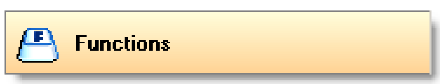
Personal Property Levy Maintenance

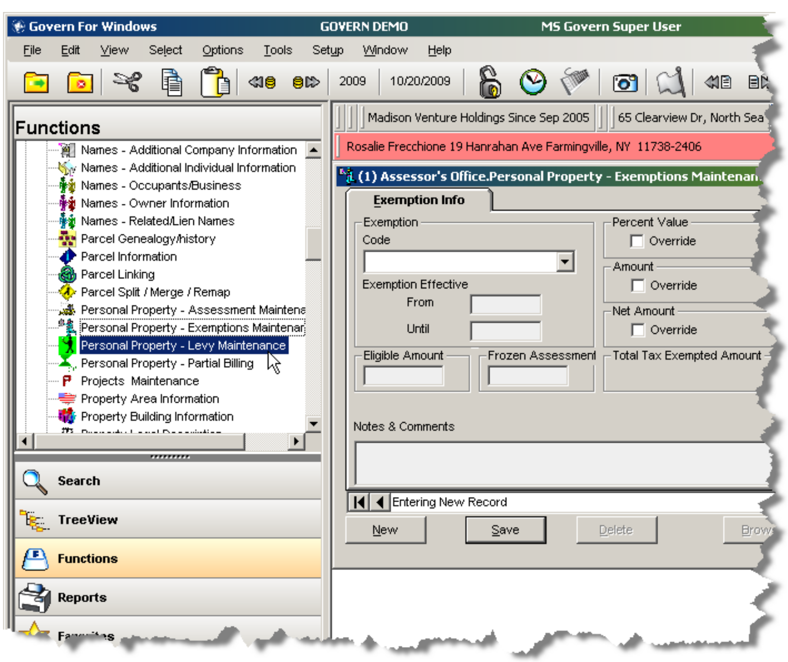
Overview

Before completing the Personal Property *Levy Maintenance* form, you need to create a record through the Personal Property *Assessment Maintenance* form. You can enter the levy records manually or automatically by linking a *Levy Group* to the property. An unlimited number of levies can be entered and further defined as detailed or summarized. The taxable base and / or tax rate can be overridden and split districts can be entered. You need to manually assign each exemption, or exemption group. The exemptions are automatically linked to the levy only when both exist. Unlimited notes and comments can be included with each levy.

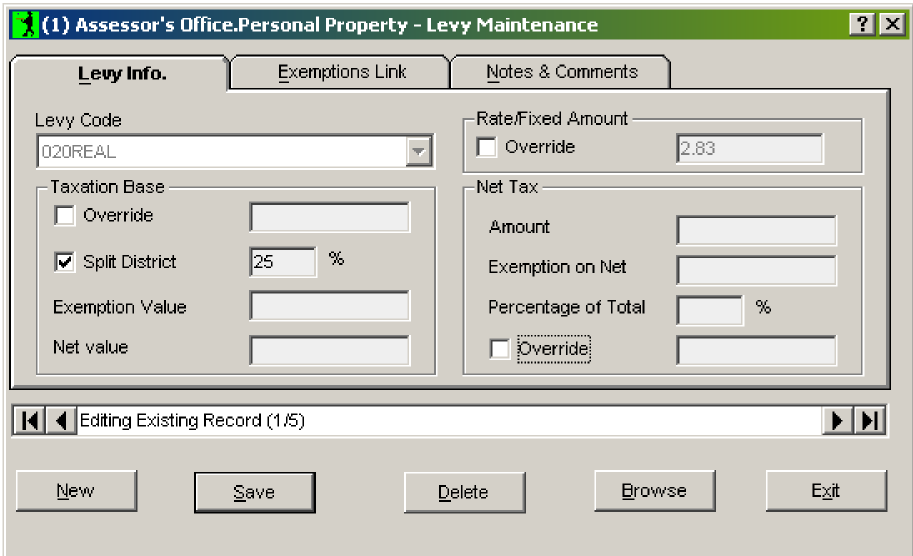
To access this form, select a record and:

1. Click **Functions** in the **Side Navigation Bar**.





2. In the *Treeview* area on the upper left hand side (LHS), select **Personal Property Levy Maintenance**.



Levy Code: Select the **Levy Code** from the drop-down list. The levy codes are created when you save the Levy Group in the Personal Property *Assessment Maintenance* form. All calculations shown and can be modified if the **Override** field is selected.

The **Exemption Value** is equal to the total of all exemptions:

Net Value = Taxation Base - Exemption Value
Net Tax Amount = Net Value x Rate

Override: Select **Override** to modify the **Taxation Base** amount.

Split District: Use this option to split an amount between two levies:

1. Select the **Split District** option.
2. Enter a percentage value in the text box. Alternately, you can enter an amount in the **Override** field.
3. Scroll to the levy that is to cover the remaining percentage of the amount and repeat steps 1 and 2.

Exemption Value: This field displays the exemption amount applied to the current levy code.

Net Value: This field displays the difference between the Taxation Base amount and the Exemption Value:

Net Value = Taxation Base – Exemption Value

Rate / Fixed Amount (Override): Select this option to override the **Rate / Fixed Amount**.

Amount: This field displays the Net Tax amount for the current Levy Code.

Exemption on Net: This field displays the Exemption on Net if the selected method is **After Computation**.

Percentage of Total: This field displays the percentage of the total tax.

Override: Select Override to modify the **Net Tax** amount.

Exemptions Link

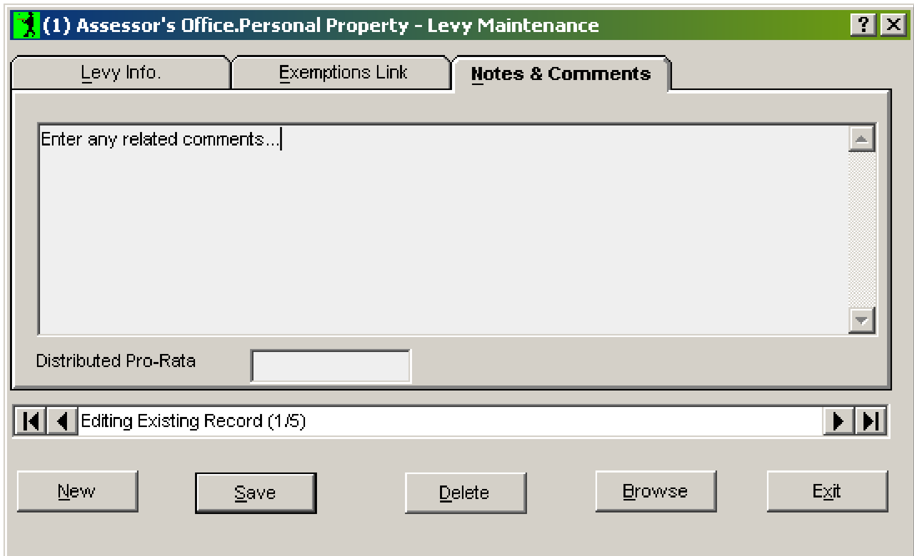
Select the **Exemptions Link** tab to add or remove an exemption from the Personal Property *Levy Maintenance* form.

Adding an Exemption to the Current Levy Code: Click **Add** to link an exemption to the Personal Property *Levy Maintenance* form. A list of all exemptions previously entered for the current property is displayed.

Removing an Exemption from the Current Levy Code: Highlight the exemption link you want to remove and click **Remove** to delete an exemption link.

Notes and Comments

Select the **Notes and Comments** tab to add an unlimited amount of notes and comments to the Levy Maintenance record and to see the distributed pro-rata amount, if applicable.



Notes & Comments: This field provides unlimited space for notes and comments.

Distributed Pro-Rata: This field displays the amount distributed if an exemption has been removed and its value has been pro-rated.

Personal Property Mailing Index

Overview

The Govern for Windows Mailing index is used to maintain bill recipient information in the *Real Estate* (**RE**), *Utility Billing* (**UB**), and *Self Reported Tax* (**ST**) modules. From this function, you can view and modify general information, such as mailing address, mailing type, primary index status, payer information, and inactive account status information.

In previous releases of Govern for Windows, when it was necessary to override the Billing Name and Address, the free form address field would need to be updated if the address changed. The previous address would not be saved; should it need to be referred to at a later date, users would have to re-enter the information.

The *Govern Mailing Index*, from *Release 10.7* is available for the *Personal Property* (**PP**) tax module. With the *Mailing Index*, it is now easier to manage the default mailing address in instances where an alternate mailing address is required. This is useful when a property owner has a temporary location that they would like their invoices/bills mailed to over a specific time period.

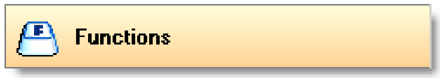
Alternate addresses are retained within the system, and where there were previously freeform entries, there are now formatted fields for the address entry. Prior to this change in the mailing index, alternate address were retained in (Table: **NA_MAILING_INDEX**); this table is now used to store the Key Sequence of the addresses. Address information is now kept in (Table: **NA_LK_NAME_ADDRESS**).

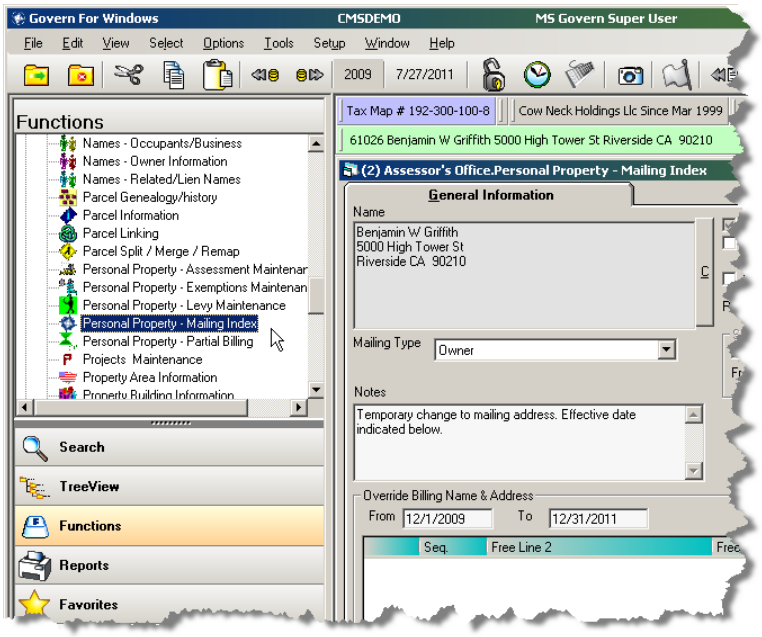
Although implemented for the *Personal Property* module, this format is also standard for all *Govern for Windows* modules that use the *Mailing Index*, i.e. *Real Estate* (**RE**), *Utility Billing* (**UB**), and *Self Reported Tax* (**ST**).

Accessing the Mailing Index Function

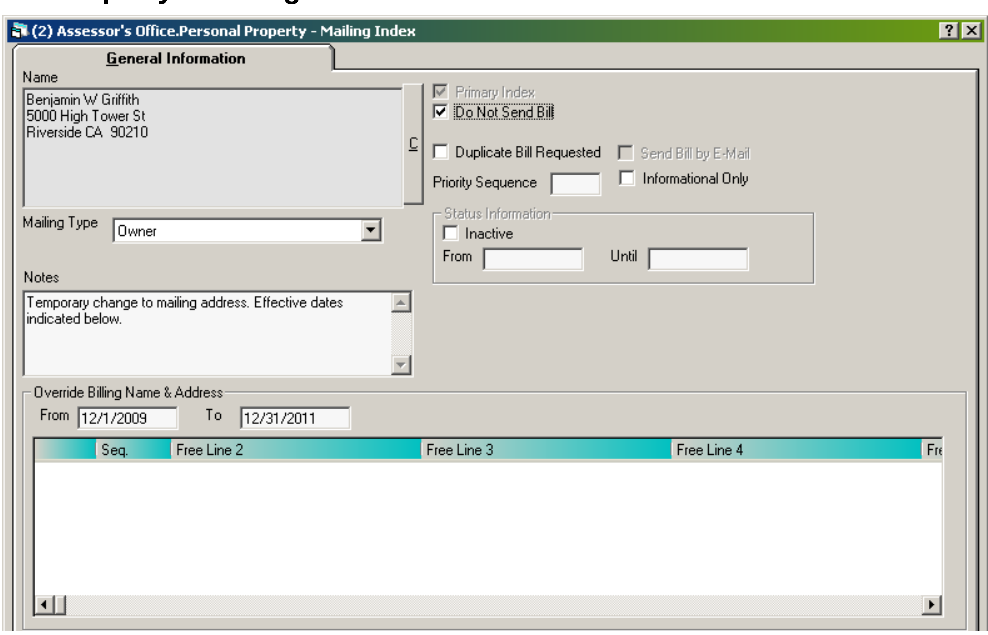
To access this function in *Govern for Windows*, select a record...

1. Click **Functions** in the **Side Navigation Bar**.





2. In the Treeview area on the upper left hand side (LHS), select **Personal Property - Mailing Index**.

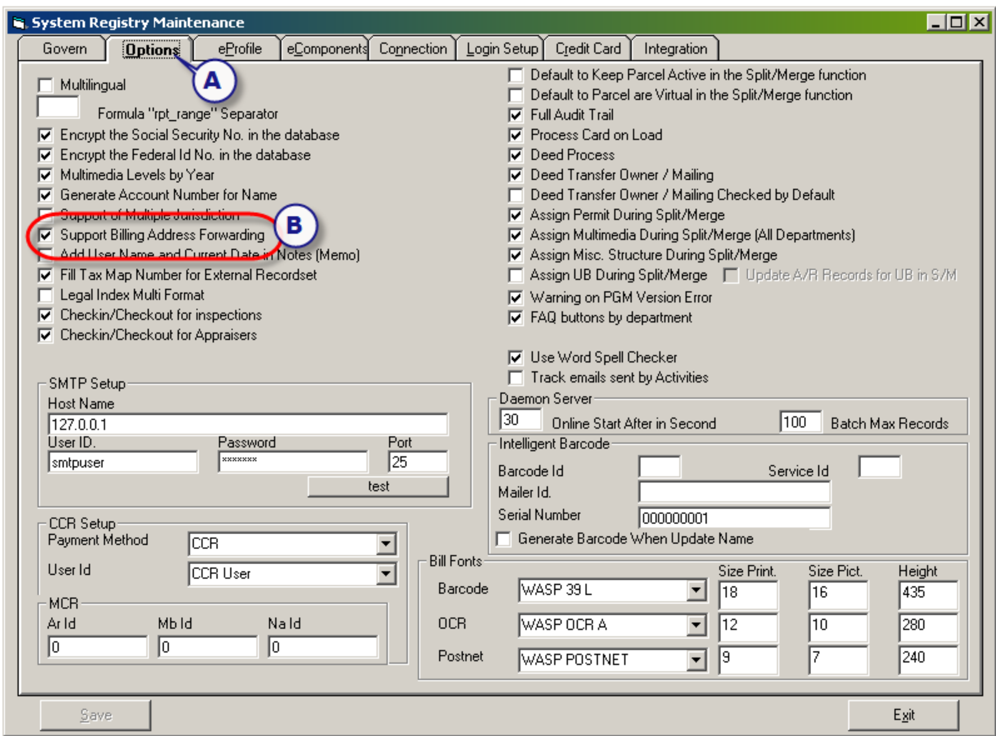


Enabling the Mailing Index in Govern Admin

The option is enabled in the *Govern for Windows Administration* program, *Govern Admin*, in the *System Registry Maintenance* form.

To enable in *Govern Admin*...

1. Select *Parameters* > **Edit the System Registry...**
2. In the *System Registry Maintenance* form, click the **Options** tab (**A**).
3. Locate and select the **Support Billing Address Forwarding** (**B**) option.



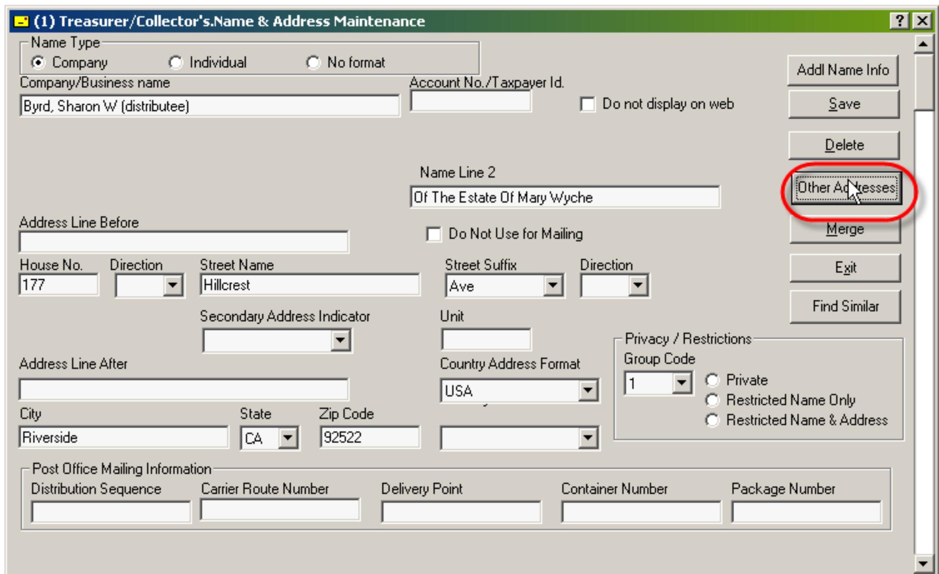
After the option has been enabled in *Govern Admin*, the setup for the alternate mailing address is accessed through the *Name & Address Maintenance* form.

Mailing Index in Govern for Windows

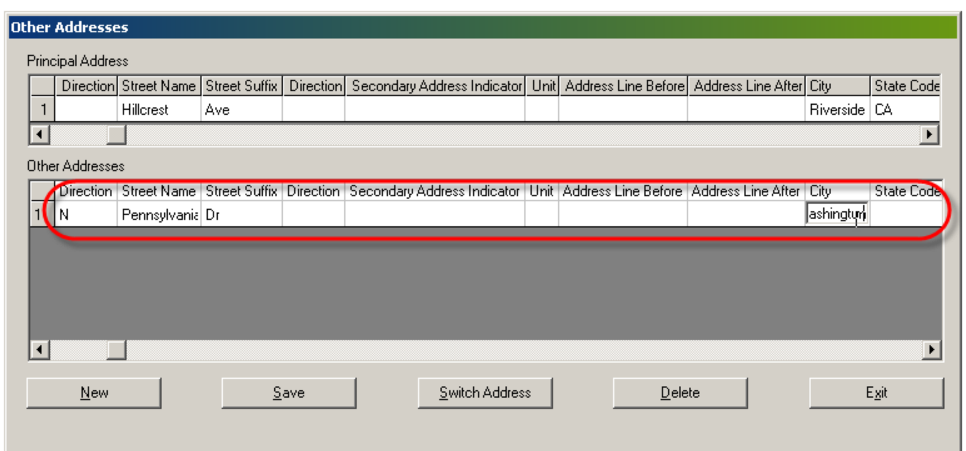
Once the option for address forwarding is enabled in *Govern Admin*, the form can then be accessed in *Govern for Windows*.

To configure an alternate address in *Govern for Windows*...

1. Perform a search in a department that has access to name records.
2. Click *Functions* in the *Side Navigation Bar* (**SNB**); click to select the *Names & Addresses Maintenance* function.
3. In the *Name & Address Maintenance* form, click on **Other Addresses**...



4. In the *Other Addresses* form, click **New**.
5. The grid in the lower section of the form will add a single line.
6. Under each column heading click in the grid to enter the required parameters...



7. Click **Save** to save the alternate address entry.
8. Click **Exit** to close the form.

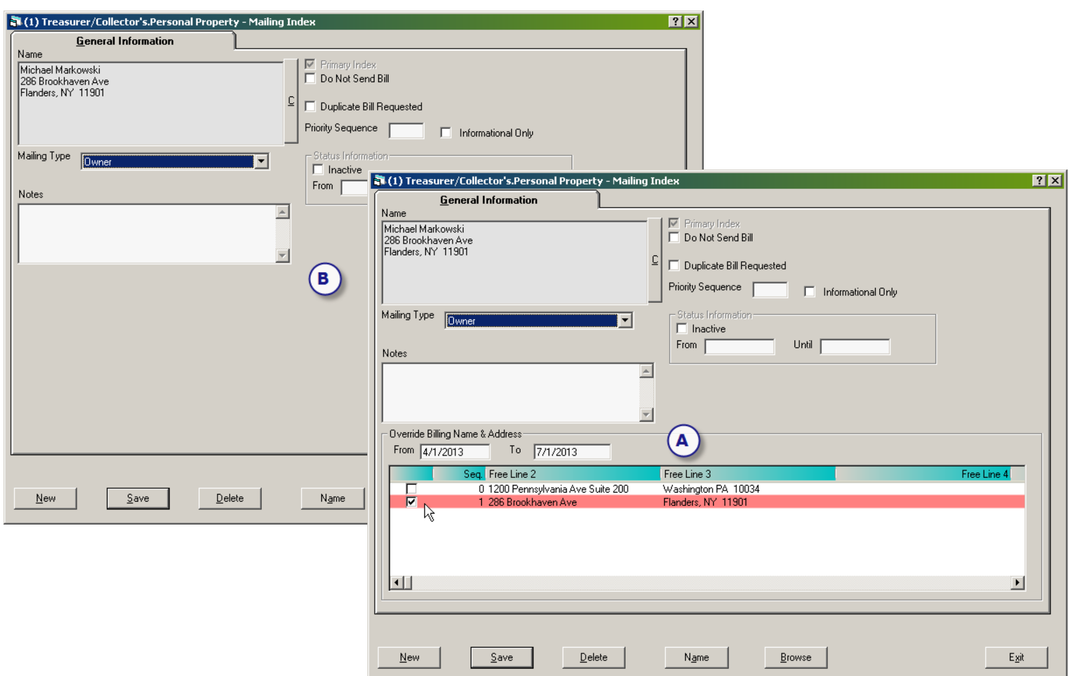
Selecting the Alternate Address

In order to set the alternate addresses that has been saved in the Name & Address Maintenance form, with the record locate the Mailing Index in the Functions pane.

To select an alternate address...

1. Click Functions in the Side Navigation Bar (SNB); click to select the Personal Property Mailing Index function.
2. In the Mailing Index form, in the lower portion of the form locate the Override Billing Name & Address group.
3. In the grid select the required alternate address with the check box.
4. Ensure that the date range that the alternate address is to use is specified in the From and To parameters.
5. Click Save to save the settings.

Note: User should note the difference in the appearance of the *Mailing Index* when the option is enabled (**A**), and when disabled (**B**).



Personal Property Mailing Index - Command Buttons

Creating a New Mailing Index Record: Click **New** to clear the form and create a new record.

Saving a Mailing Index Record: Click **Save** to save a new record or any modifications made to an existing one.

Deleting a Mailing Index Record: Click **Delete** to remove the current record. A confirmation message is displayed if there are any unsaved modifications. Click **Yes** to continue or **No** to return to the *Personal Property Mailing Index* function. A message is displayed in green in the bottom right hand corner of the screen to indicate that the record has been deleted.

Name: Click **Name** to launch the *Name & Address Maintenance* function. You can view additional information on this screen or make any required modifications. *Refer to the Property Control guide for more information on the Name & Address Maintenance function.*

Browsing Mailing Indexes: Click **Browse** to view a list of the names and addresses of the recipients of the bills.

Exit: Click **Exit** to close the form.

Personal Property Mailing Index - Parameters

Name: This field displays the Name and Address information for the selected Personal Property account. To modify this information, click **Name**, as described above. To use an alternate name and address record or to create a new one, click **C** to open the Name Search screen. Click **Search** to select an existing record or click New to create a new one. Refer to the *Personal Property* guide for more information on the *Name Search*.

Mailing Type: Select the Mailing Type, from the drop-down list; such as, Managing Agent, Mortgage, Owner, Payer, Previous Customer, Temporary Owner, or Third Party Mortgage (Table: **VT_SY_MAILTYPE**).

Note: If **Mortgage** is selected, the **Loan Number** field is displayed.

Duplicate Bill Requested: Select this option to create a duplicate bill.

Send Bill by E-mail: When this option is selected, the Personal Property bill will be sent as an email attachment.

Note: This option will not be active when the **Do Not Send Bill** option is selected

Priority Sequence: Enter a priority sequence to define the order in which bills are sent out.

To set up the *Priority Sequence*:

1. Enter 1 in the *Priority Sequence* parameter of the mailing index records for the individuals and companies whom you want to receive first billing.
2. Enter 2 for those whom you want to receive second billing and so on.
3. Leave this field blank those whom you want to receive billing in the standard order, after the priority records are sent out.

Notes: This field provides unlimited space for notes and comments.

Status Information group

From / Until: Select Inactive to indicate the selected index is inactive.

- If the Inactive option is selected and dates are entered in the From / To parameters, there will not be any bills sent during this period.
- If the Inactive option not selected and dates are entered in the From / To parameters then the bills will be sent during this period.

Primary Index: When selected, this option indicate the person or company displayed in the Name text box is the Primary Index.

The following conditions apply to the Primary Index.

- You can have only one primary index per account.
- If a primary index is not selected, the first name and address record entered becomes the primary index.
- The original bill is sent to the primary index only. All other persons and companies in the mailing index receive a duplicate bill, unless the **Do Not Send Bill** option is selected.

- If the name status for the record selected as the primary index is set to inactive, a duplicate bill is sent to this record and Temporary Owner receives the original bill.
- The primary index indicates the name displayed on all reports.

For example, if the Personal Property Tax bill is to be paid by the tenant; select this record as the Primary Index. The owner is sent a duplicate bill, unless

Do Not Send Bill: Select this option if you do not want to send a bill.

Override Billing Name & Address group

Note: These fields are enabled only if the **Support Billing Address Forwarding** option is selected on the *System Registry Maintenance* form in *Govern Admin*.

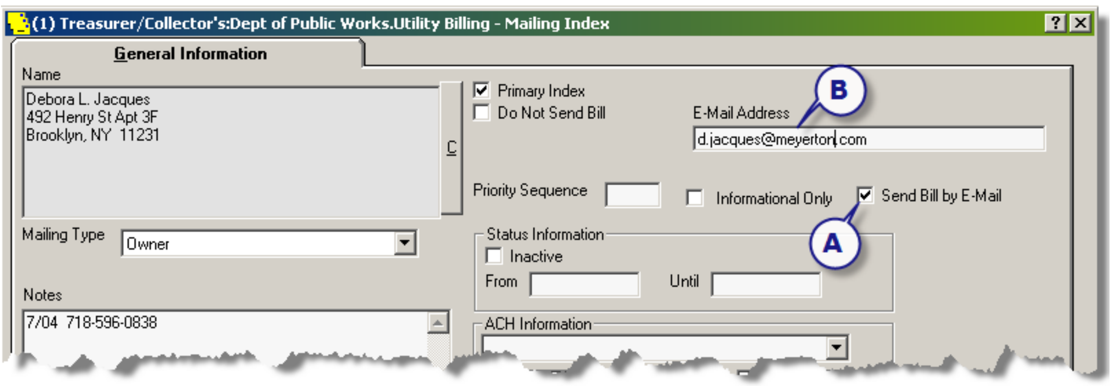
To override a billing address:

1. Double-click in the date parameters and select the From and To dates for the period during which you are forwarding the bill.
2. Enter the name and address information in the six lines provided.

Note: You will need to contact the *Govern Support* team in order to set up the forwarding parameters for your utility bills.

Option to send Bills by E-mail

The send Bill by E-mail option (**A**), when selected, will allow the system to send Bills to the e-mail address that is specified in the **E-mail Address** field (**B**). If the **Do Not Send Bill** option is selected, both the option and the field will be disabled.



When this option is selected, during the *Govern Batch Utility Billing Bill Extraction* process, a PDF file of the bill will be generated.

Modifications to NA_MAILING_INDEX Table

The following fields have been created to accommodate the *Billing by E-mail* feature:

Field Name	Data Type	Description
BILL_BY_EMAIL	smallint	Selection option.
EMAIL_ADDRESS	Text	E-mail address to send bill to.

Status Information

From / To Dates:

Select **Inactive** to indicate the selected index is inactive.

- If the **Inactive** option is **selected** and dates are entered in the From / To fields, there will not be any bills sent during this period.

- If the **Inactive** option **not selected** and dates are entered in the From / To fields then the bills will be sent during this period.

ACH Information

Note: The **ACH Information** fields are enabled for the *Primary Index* only.

The Automated Clearing House (ACH) feature is used for electronically transferring funds from the customer's financial institution for bill payment.

The customer's account information is now entered in the new *ACH Information by Name* function. *Refer to the ACH Processing chapter in the Accounts / Receivable guide for details*.

ACH Information: Select the customer's account, from the drop-down list.

From / Until: Double-click in the date fields and select a range of dates from the pop-up calendar if the ACH is to be used during a specific time only. You can also enter a date in the **From** field or the **Until** field only.

Bill Forwarding Information

Note: These fields are enabled only if the **Support Billing Address Forwarding** option is selected on the *System Registry Maintenance* form in Govern Admin.

To create a forwarding address:

1. Double-click in the date fields and select the **From** and **To** dates for the period during which you are forwarding the bill.
2. Enter the name and address information in the six lines provided.

Note: You will need to contact the Govern Support team in order to set up the forwarding parameters for your utility bills.

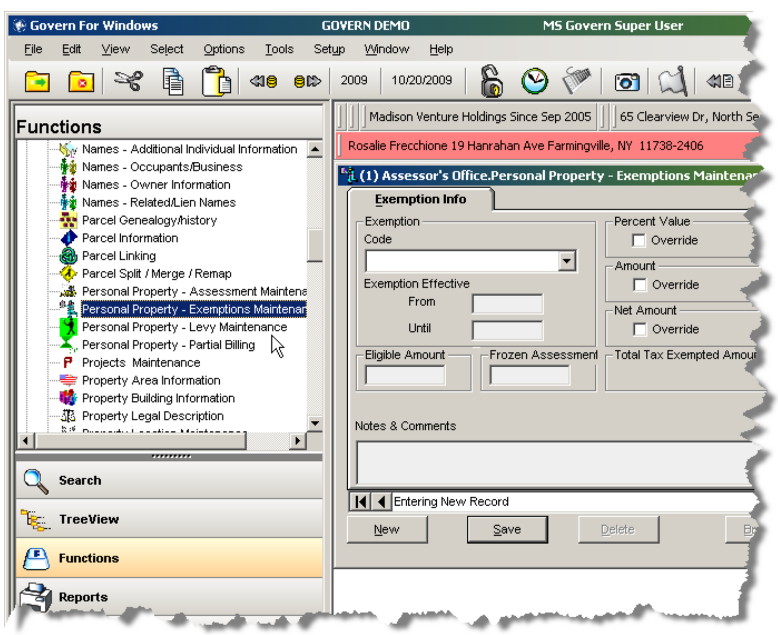
Exemptions by Name

Overview

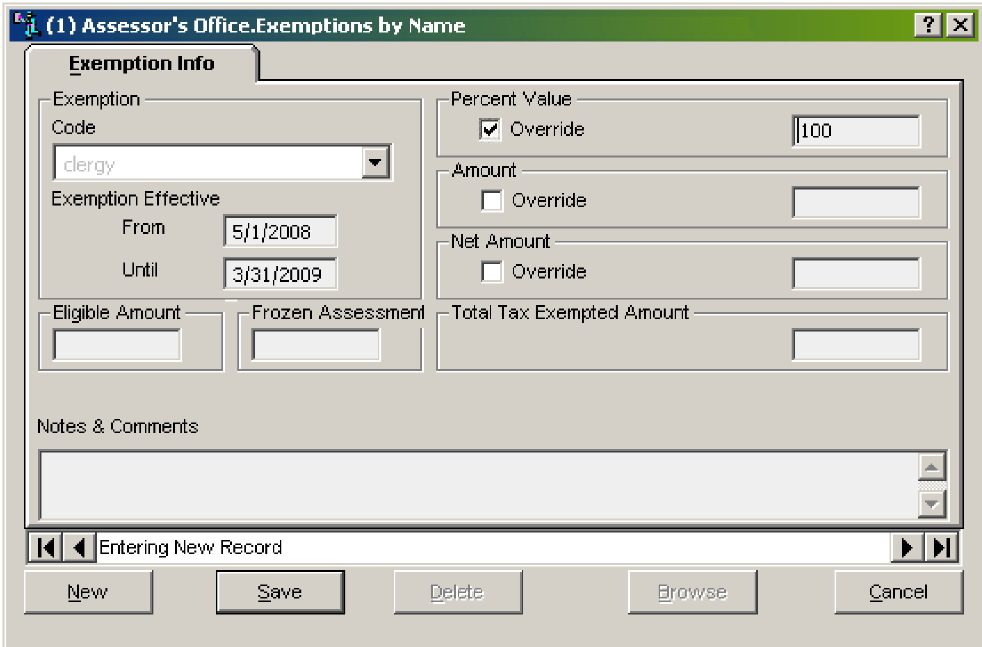
The *Exemption by Name* form is used to create exemption codes that will be linked to a specific name. An associated exemption is created for each sub-system set up in Govern Admin.

To access this form, select a record and:

1. Click **Functions** in the *Side Navigation Bar* (**SNB**).



2. In the *Treeview* area on the upper left hand side (LHS), select **Exemptions by Name**.



Exemption Code: Select the **Exemption Code** from the drop-down list (Table: NA_EXEMPTIONS).

Exemption Effective From/Until (dates): Double-click in the **From** and **To** date fields to select the period the current exemption is effective.

Percent Value: This field displays the percentage value for the exemption if **Percentage** is selected in the **Exemption By** field on the *Tax Exemption Parameters (*Personal Property*)* form in Govern Admin. Select **Override** to modify this value.

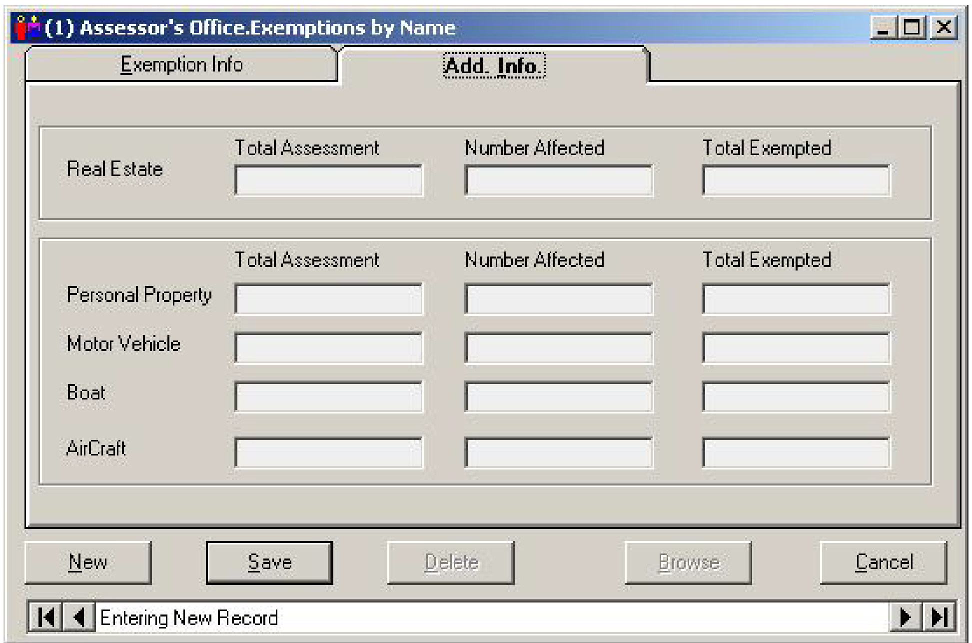
Amount: This field displays the exemption amount if Amount is selected in the **Exemption By** field on the *Tax Exemption Parameters (*Personal Property*)* form in Govern Admin. Select **Override** to modify this value.

Net Amount: This field displays the **Net Amount** if **After Computation** is selected under **Exemption Applicable** on the *Tax Exemption Parameters (*Personal Property*)* form in Govern Admin. Select **Override** to modify this value.

Notes & Comments: This field provides unlimited space for notes and comments.

Additional Information

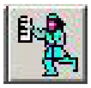
Select the **Additional Information** tab to view the total assessment and exemption amounts for all tax modules.



Total Assessment: This field displays the sum of all the assessments linked to the current exemption by name for each sub-system.

Number Affected: This field displays the number of all the assessments linked to the current exemption by name for each sub-system.

Total Exempted: This field displays the sum of all the exemptions linked to the current exemption by name for each sub-system.



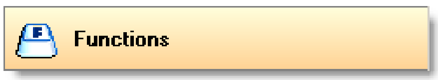
Personal Property Exemptions Maintenance

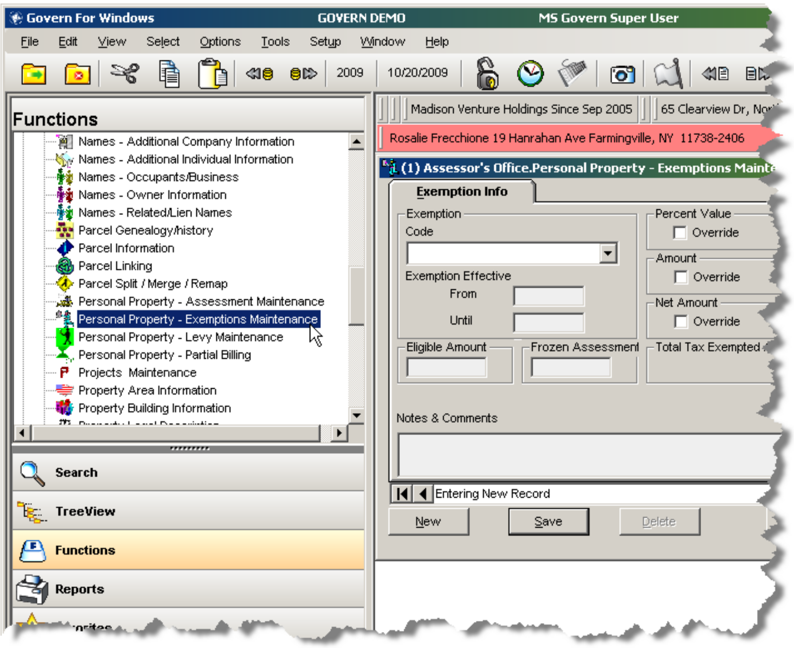
Overview

The Personal Property *Exemptions Maintenance* form is used for setting up and maintaining tax exemptions. The exemptions can be created and applied manually or by selecting an exemption group, previously set up in Govern Admin. The exemption amount is displayed if **Amount** is selected in the **Exemption By** field on the *Exemption Codes* form in Govern Admin. If **Percentage** is selected in this field, the value displayed is equal to **Total Assessment** * **Percentage**, up to the **Limit Value** entered.

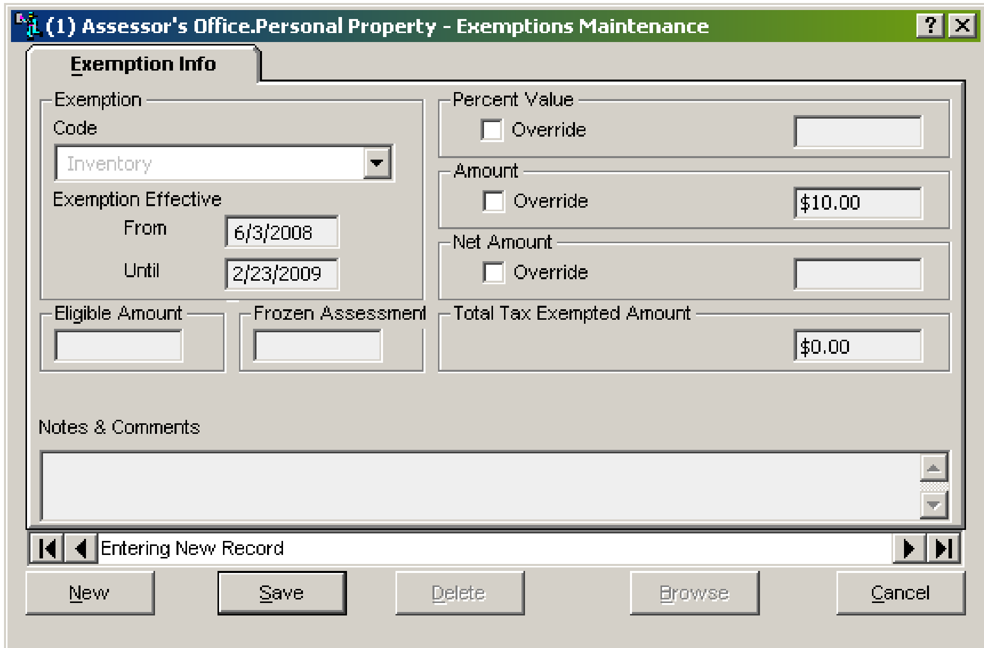
To access this form, select a record and:

1. Click **Functions** in the **Side Navigation Bar**.





2. In the *Treeview* area on the upper left hand side (LHS), select **Personal Property Exemption Maintenance**.



Exemption Code: Select the **Exemption Code** from the drop-down list (Table: VT_USR_EXEMPTPP).

Exemption Effective From/Until (dates): Double-click in the date fields and select the From and To dates to apply this exemption code, from the pop-up calendar.

Eligible Amount: If you enter an eligible amount the system will use this value instead of the specified assessment value. It should be used with percentage type exemption.

Percent Value: This field displays the percentage value for the exemption **Percentage** is selected in the **Exemption By** field on the *Exemption Codes* form in Govern Admin. Select **Override** to modify this value.

Amount: This field displays the exemption amount if **Amount** is selected in the **Exemption By** field on the *Exemption Codes* form in Govern Admin. Select **Override** to modify this value.

Net Amount: The Net Amount is displayed if the selected method is **After Computation**. Select **Override** to modify this value.

Total Tax Exempted Amount: This field displays the total amount as computed by the system for the current exemption.

Notes & Comments: This field provides unlimited space for notes and comments.

Note: If an exemption is removed during the year, the exemption will be pro-rated in the following fiscal year on the Levy Code set in the Personal Property *General Parameters* form in Govern Admin.

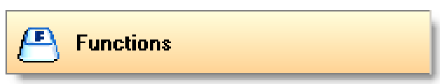
Personal Property Partial Billing

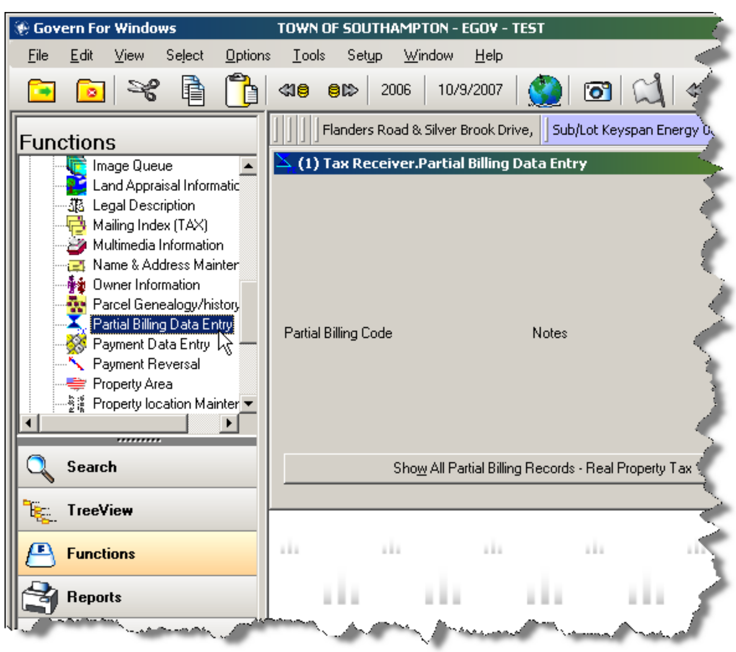
Overview

The Personal Property *Partial Billing Data Entry* form is used to handle omitted assessments, erroneous assessments, court orders and apportionments. A partial billing can be executed only after a posting has been made. In the following example, the client has received a bill and noticed a mistake. The taxation officer must make the necessary changes and request that the bill be re-posted. The Tax Receiver will use this function to request a new tax bill computation.

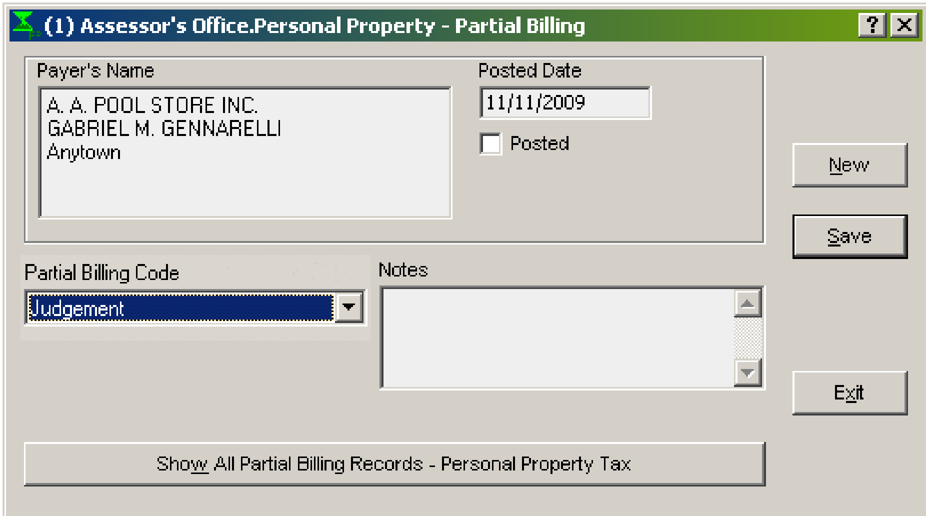
To access this form, select a record and:

1. Click **Functions** in the **Side Navigation Bar**.





2. In the *Treeview* area on the upper left hand side (LHS), select **Partial Billing Data Entry**.



Saving the Partial Billing Data Entry Record: Click **Save** to save a new Partial Billing record or any modifications to an already existing one.

Exit: Click **Exit** button to close the screen. You will lose any unsaved data.

Payer's Name: This field displays the payer's name and cannot be changed.

Posted Date: This field displays the date the original bill was posted.

Posted: To post the partial billing, deselect this field. Before you can use this form, the bill must have been already posted).

Partial Billing Code: Select the **Partial Billing Code** from the drop-down list (Table: VT_USR_PRTBILL).

Notes: This field provides unlimited space for notes and comments.

Show All Partial Billing Records — Personal Property Tax: Select this option to open a *Browsing* screen displaying all the partial billing records. By default, this screen displays the bar code, the short description and the date posted, if applicable.

CHAPTER THREE: BATCH PROCESSING

Overview

The following batch processes are available through the Personal Property *Taxation module*.

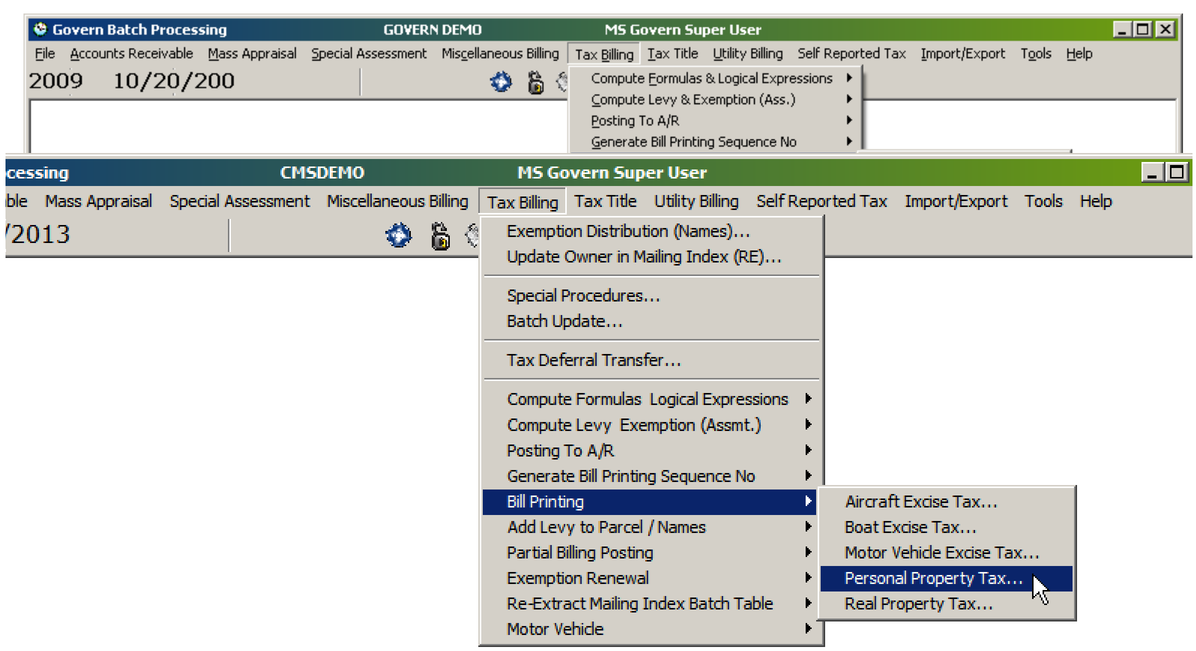
To access a Batch Processing function, from Govern's main screen, select *Tools* > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications;

Click *Govern Batch Processing.*

In *Govern Batch Processing*, select *Tax Billing* > *any of the following process* > **Personal Property Tax**.



For details on the Govern Batch Processing graphical user interface, r*efer to the General Information guide*.

Personal Property Batch Processes

Compute Formulas & Logical Expressions

Run this process to recalculate a group of selected formulas and logical expressions. Typically, this process is run when the value of a constant changes. If the constant is used in multiple formulas and expressions, you can run the batch process and update them all automatically rather than opening, modifying and saving each one. *See Compute Formulas and Logical Expressions on page 123*.

Compute Levies and Exemptions

Run this process to recalculate the levies and/or the exemptions after a change in tax rates or exemption amounts / percentages.

Tip: Run this process prior to printing the tax bills.

See Compute Levies and Exemptions on page 126.

Post to A/R

Run this process to transfer calculated values to the Govern Accounts Receivable module. *See Posting to Accounts Receivable on page 129*.

Generate Bill Sequence Numbers

Run this process to generate bill sequence numbers.

Tip: Run this process just before you print the bills.

See Generate Bill Sequence Numbers on page 132.

Print Bills

Run this process to generate original bills or regenerates duplicates. *See Bill Printing on page 134*.

Mail 4+ Format

There are two batch processes for generating tax billing information in Mail 4+ Format:

- Export Names in Mail 4+ Format: to create a database with the name records for the selected properties. This needs to be updated through the Melissa Address Verification software with Mail 4+ data.
- Import Names in Mail 4+ Format: to update the NA_NAMES table with the Mail 4+ data.

Refer to the Super User guide for details.

Add Levy to Parcel

Run this process to apply a levy to one or more parcels. *See Add Levy to Parcel / Name on page 139*.

Post Partial Billing

Run this process to post all the partial-billing records to the Govern Accounts Receivable module. *See Partial Billing Posting on page 142*.

Renew Exemptions

Run this process to renew an exemption for a specific property for a specified period of time. *See Exemption Renewal on page 145*.

Exemption Distribution (Names)

Run this process to apply exemptions, based on the priority set through the *Exemption by Name, Parameters* form in Govern Admin. *See Exemption Distribution (Names) on page 147*.

Re-extract Mailing Index Batch Table

Run this process to re-generate the Mailing Index Table. Typically, this is used to update the bill sort sequence. *See Re-Extract Mailing Index Batch Table on page 149*.

Batch Update

Run this process to update any database field in the Personal Property module, based on user-defined criteria. *See Batch Update on page 152*.

TSO Data Processing

For details on processing Personal Property data for Tax Service Organizations, *refer to the Processing TSO Data guide*.

Compute Formulas and Logical Expressions

Overview

The *Compute Formulas and Logical Expressions Batch Process* is run to update a group of selected formulas and logical expressions. Typically, it is used when the value of a constant changes; for example, at the start of a new fiscal year. If the constant is used in multiple formulas and expressions, you can run the batch process to automatically update all at once, rather than opening, modifying and saving each one.

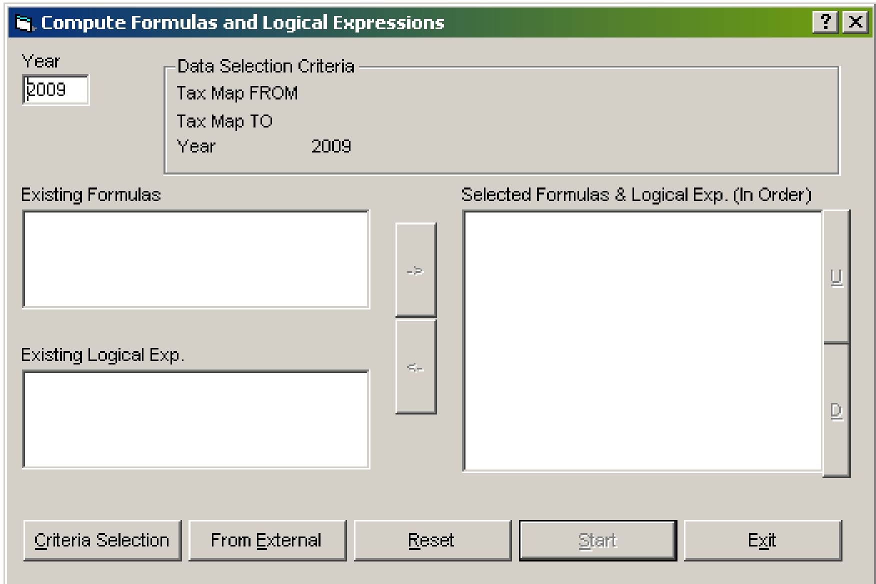
To access this Batch process function, from Govern's main screen, select *Tools* > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications;

Click *Govern Batch Processing.*

In *Govern Batch Processing*, select *Tax Billing* > *Compute Formulas & Logical Expressions* > **Personal Property Tax**.



Compute Formulas and Logical Expressions Parameters

Year: Enter the year in which the tax bills are saved.

Existing Formulas: Select the formulas to re-compute and click on the right arrow (->). To remove a selection, click on the left arrow (<-).

Existing Logical Expressions: Select the expressions to re-compute and click on the right arrow (->). To remove a selection, click on the left arrow (<-).

Selected Formulas & Logical Expressions (in order): This list box displays all the formulas and logical expression you have selected for the update. You can use the **U** and **D** buttons to move them up and down in the list. This ensures that if an expression is dependent on the result of another expression is processed after that expression.

Compute Formulas and Logical Expressions Command Buttons

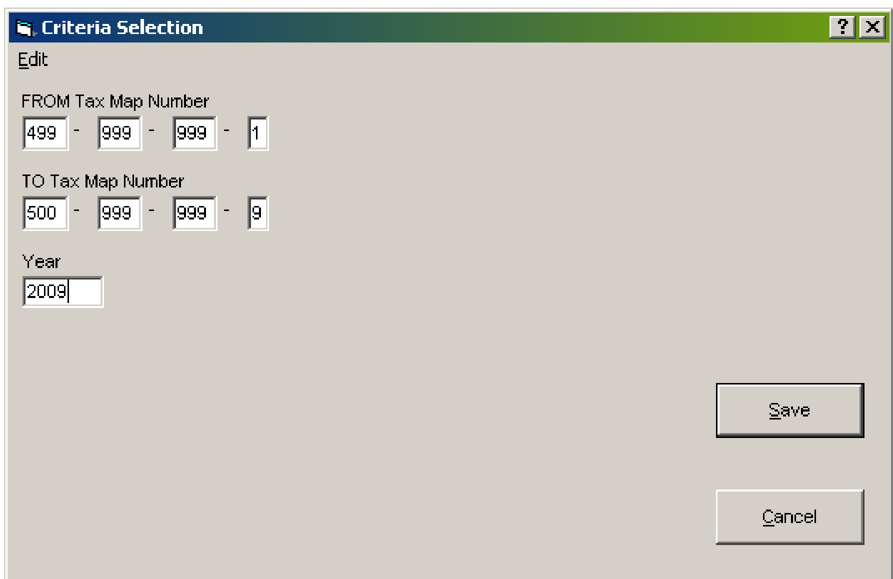
Criteria Selection: Click **Criteria Selection** to open the *Tax Billing Criteria Selection* screen that allows you to enter a range of Tax Map Numbers or other criteria to delimit the computation. Enter a tax map range or leave the parameters blank to compute all taxes.

From External: Select *From External* to use data that is loaded into the PC_EXTERNAL table.

Resetting the Form: Click the **Reset** button to clear all selections.

Starting the Compute Process: Once you have made your selections, click **Start**.

Criteria Selection Parameters



FROM Tax Map Number / TO Tax Map Number: Enter a range of Tax Map Numbers to process.

Year: Enter the year in which the tax bills are saved.

Criteria Selection Command Buttons

Saving the Computation Criteria: Click **Save** to save the values used by the system to execute the process.

Compute Levies and Exemptions

Overview

The *Compute Levies and Exemptions* form is used to re-compute the levies and/or the exemptions after a change in the tax rates, exemption amounts or percentages. It is recommended to run this process prior to printing the tax bills.

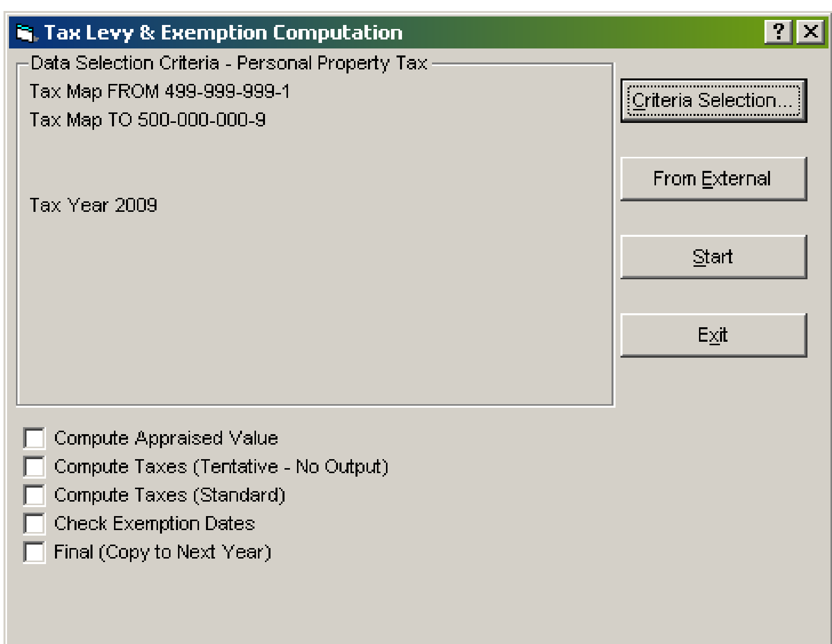
To access this Batch process function, from Govern's main screen, select *Tools* > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications;

Click *Govern Batch Processing.*

In *Govern Batch Processing*, select *Tax Billing > Compute Levy & Exemption (Assessment)* > Personal Property **Tax**.



Starting the Computation Process: Select your criteria and applicable options, then click **Start** to launch the levy and exemption computation. If no options are selected, the system recalculates all levy taxes and exemptions and saves all values in PP_POST_MASTER.

Note: You need to run this computation process before you post the Personal Property Tax bills to the A/R module and print the bills. Once the computation is completed, you will be prompted to run the crystal report. Click **Yes** to run the report and **No** cancel.

From External: Click **From External** to run a batch process on an external recordset (Table: PC_EXTERNAL).

Compute Appraisal Value : Select this option to recalculate all the appraisal values.

Compute Taxes (Tentative – No Output) : Select this option to automatically recalculate all values without updating the PP_POST_MASTER table. This is faster than the standard method and recommended when you are not ready to post the values to the Accounts Receivable module.

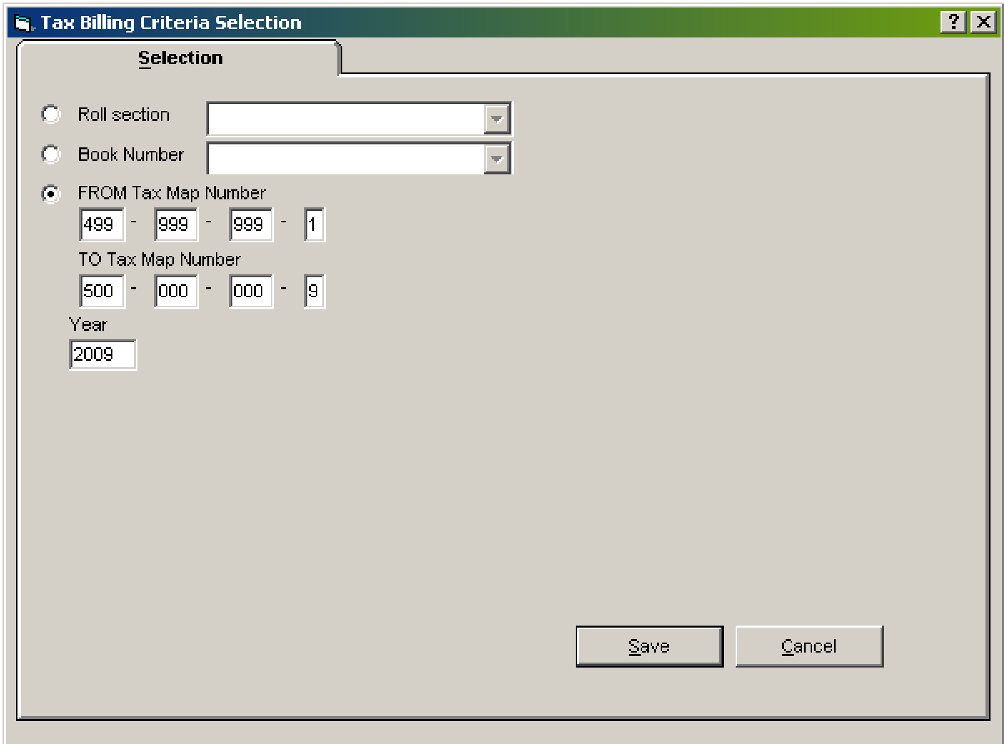
Compute Taxes (Standard) : Select this option to automatically recalculate all values and update the PP_POST_MASTER table.

Check Exemption Dates: Select this option to verify the exemption dates prior to performing the computation.

Final (Copy to Next Year): Select this option to copy all the Personal Property tax values from the selected year to the following fiscal year. The current year is then considered closed. See for details.

Note: Process the Tax Computation before transferring data to the following fiscal year since those two actions are not executed simultaneously.

Criteria Selection: Click **Criteria Selection** to open the *Tax Billing Criteria Selection* screen that allows you to enter a range of Tax Map Numbers or other criteria to delimit the computation.



Saving the Computation Criteria: Select the applicable criteria and click Save to save the values used by the system to execute the process.

Select one of the three following options to delimit the computation or leave all the selections blank to compute all taxes:

- **Roll Section**: and select a **Roll Section** from the drop-down list (Table: VT_USR_ROLLSECT).
- **Book Number**: and select a **Book Number** from the drop-down list (Table: VT_USR_BOOKNO).
- **From Tax Map Number** / **To Tax Map Number** and enter a range of Tax Map Numbers to process.

Year: Enter the year in which the tax bills are saved.

Posting to Accounts Receivable

Overview

Run the *Posting to A/R* batch process to transfer the computed Personal Property tax values to the Govern Accounts Receivable module.

This process updates the associated taxpayer receivable files and generates the proper general ledger entries.

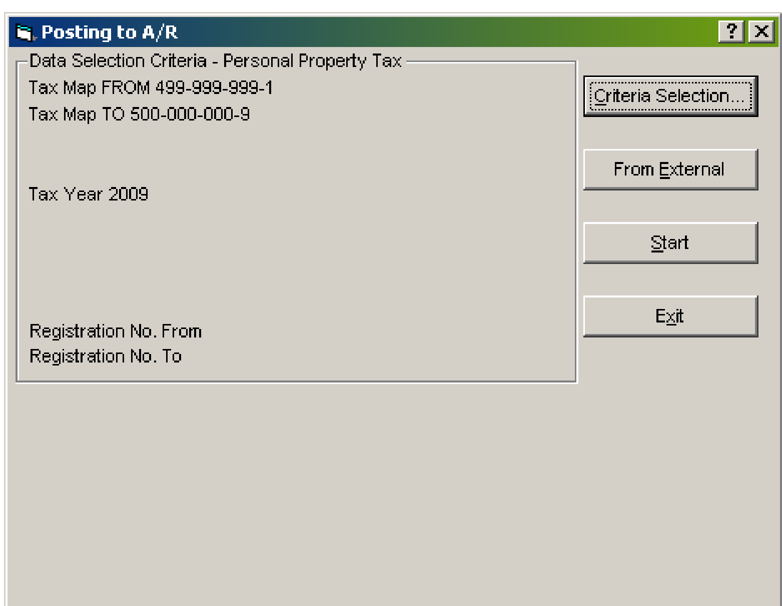
To access this Batch process, from Govern's main screen, select **Tools** > **Batch Processing (Govbat32.exe)**

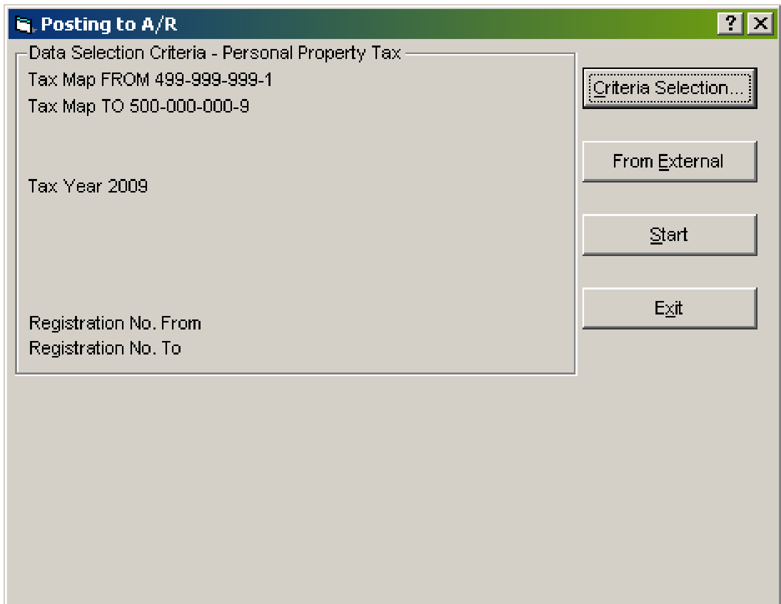
OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications;

Click *Govern Batch Processing.*

In *Govern Batch Processing*, select *Tax Billing* > *Posting to A/R* > **Personal Property Tax**.



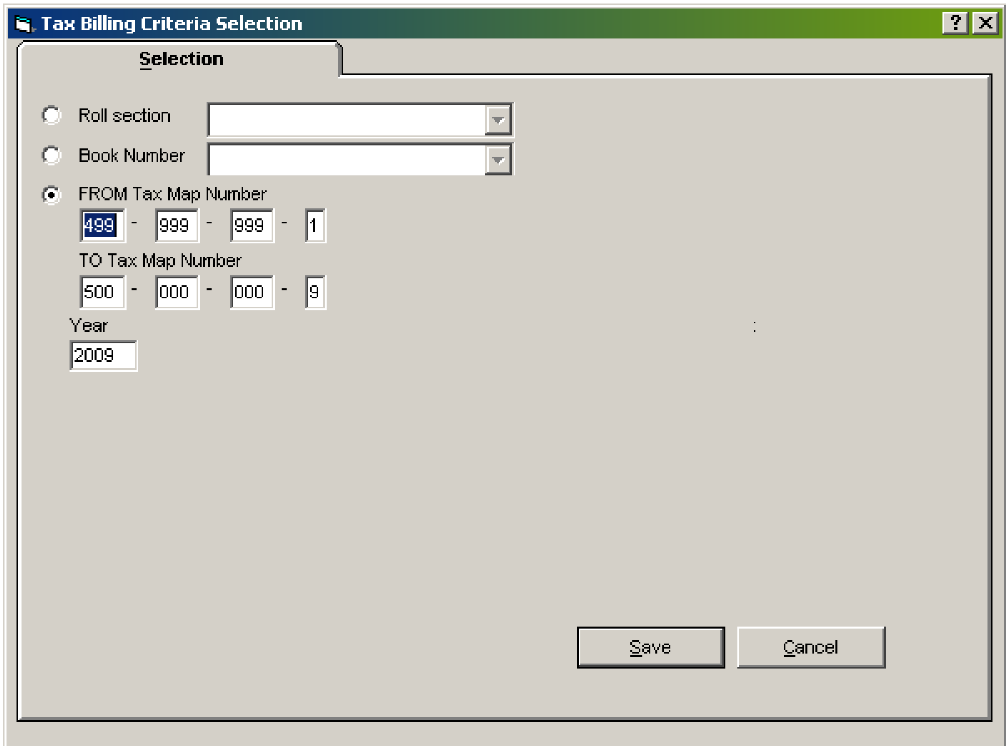


Starting the Posting to A/R Process: Select your criteria and the applicable option; then click **Start** to launch the **Posting to the A/R** process. A confirmation message is displayed. Click **Yes** to continue or **No** to cancel the process.

From External: Click **From External** to run the batch process on an external recordset (Table: PC_EXTERNAL).

Use Book Number as the Bill Prefix: Select this option to use the first two characters of the book number as the Bill Number prefix.

Criteria Selection: Click **Criteria Selection** to open the Tax Billing Criteria Selection screen.



Saving the Computation Criteria: Select the applicable criteria and click Save to save the values used by the system to execute the process.

Select one of the three following options to delimit the computation or leave all the selections blank to compute all taxes:

- **Roll Section**: and select a **Roll Section** from the drop-down list (Table: VT_USR_ROLLSECT).
- **Book Number**: and select a **Book Number** from the drop-down list (Table: VT_USR_BOOKNO).
- **From Tax Map Number** / **To Tax Map Number** and enter a range of Tax Map Numbers to process.

Year: Enter the year in which the tax bills are saved.

Bill Prefix: Enter a Bill Prefix for the Personal Property tax bills.

Generate Bill Sequence Numbers

Overview

Run the *Generate Bill Sequence Numbers* to generate bill sequence numbers for the current Personal Property tax bills.The first bill sequence number is set to 1. This is an internal number used as an index to print the bills.

Tip: Run this process just before you print the bills. The first bill sequence number is set to 1. This is an internal number used as an index to print the bills.

Note: If any modifications were made during the year, you MUST run the *Re-Extract Mailing Index Batch Table* batch process prior to running this process.

To access this Batch process, from Govern's main screen, select *Tools* > **Batch Processing (Govbat32.exe)**.

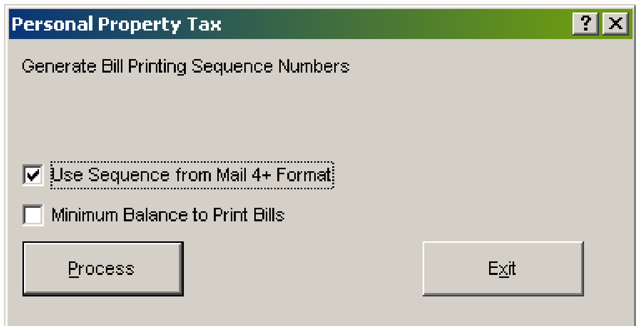
OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications;

Click *Govern Batch Processing.*

In *Govern Batch Processing*, select *Tax Billing* > *Generate Bill Sequence No.* > **Personal Property Tax**.

Note: A confirmation message appears.



To set up bill sequence number generation:

1. Select **Use Sequence from Mail 4+ Format** if you are using the Mail 4+ Format. Otherwise, leave this field blank.
2. Click **Yes** on the confirmation message to continue or **No** to cancel.

Bill Printing

Overview

Run the *Bill Printing* batch process to generate original bills or regenerate duplicate one.

To access this Batch process, from Govern's main screen, select **Tools** > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications;

Click *Govern Batch Processing.*

In *Govern Batch Processing*, select *Tax Billing* > *Bill Printing* > **Personal Property**.

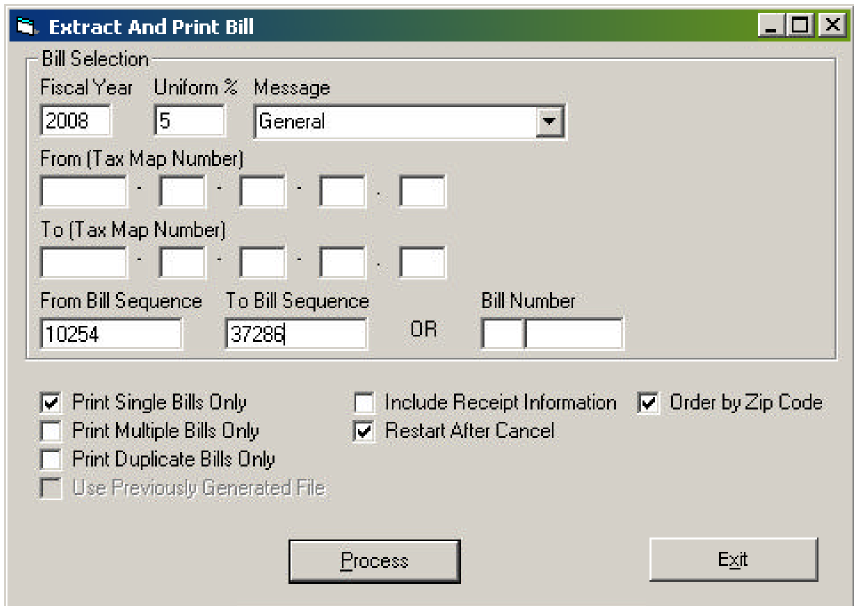
Two bill printing methods are available through Govern Batch Processing.

- Crystal Report
- Visual Basic (a custom method)

The system default is the crystal report method. Due to the varied bill printing methods, often a custom method is developed by Govern for clients. In the instance that a custom report has been developed, then this method will be presented.

Note: No option is available to the user to select a bill printing method. For details regarding a custom method, contact MS Govern support.

Using Visual Basic to Print Personal Property Bills



Fiscal Year: Enter the fiscal year in which the tax bills are saved.

Uniform %: This field is for informational purposes only. It displays the

Message: Select a message from the drop-down list.

From Tax Map Number / To Tax Map Number: Enter a range of tax map numbers for running the process.

From Bill Sequence / To Bill Sequence: Enter a range of bill sequence numbers for the printing process.

Or Bill Number: Enter the bill number you want to print. This field is used for printing a single bill; for example, after creating a *Partial Billing* record.

See *Personal Property Partial Billing on page 117* for details.

Print Single Bills Only: Select this option to print only the bills associated with the **Single Bill** setting in PP_POST_MASTER. The **Single Bill** setting is flagged in this table after an initial posting is made in the fiscal year. This indicates that a single property is associated with the name. When this option is selected, the **Print Multiple Bills Only** and **Print Duplicate Bills Only** options will be disabled.

Print Multiple Bills Only: Select this option to print only the bills associated with the **Multiple Bill** setting in PP_POST_MASTER. The **Multiple Bill** field is flagged in this table after an initial posting is made in the fiscal year. This indicates that multiple properties are associated with the name. When this option is selected, the **Print Single Bills Only** and **Print Duplicate Bills Only** options will be disabled.

Print Duplicate Bills Only: Select this option to print only the bills that are associated with the **Duplicate Bill** setting. This is set for the when the **Duplicate Bill Requested** option is selected on the *Personal Property Assessment* function. *See Personal Property - Assessment Maintenance on page 73*.

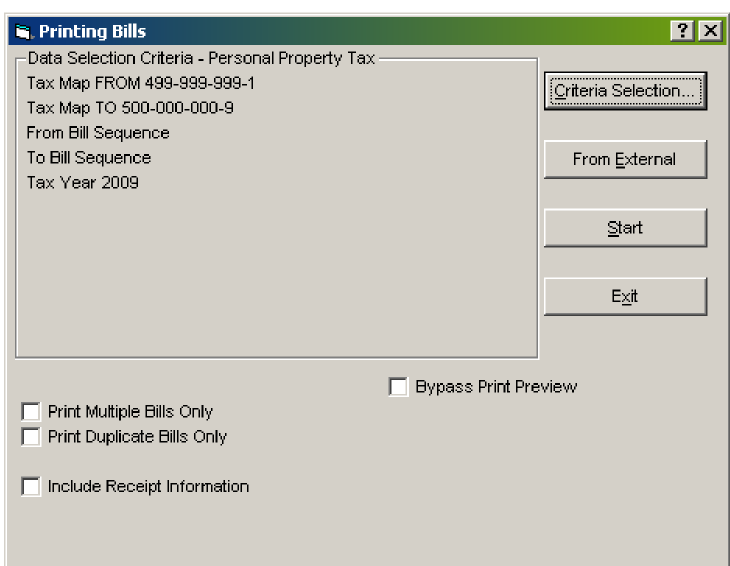
When this option is selected, the **Print Multiple Bills Only** and **Print Single Bills Only** options are disabled.

Use Previously Generated File: This field is enabled if a file was already created.

Include Receipt Information: Select this option to include the receipt information with the bills.

Restart After Cancel: Select this option to automatically start the process after a crash or failure.

Using Crystal Report to Print Personal Property Bills



Starting the Printing Process: Click **Start** to launch the billing process.

From External: Click **From External** to run the batch process on an external recordset (Table: PC_EXTERNAL).

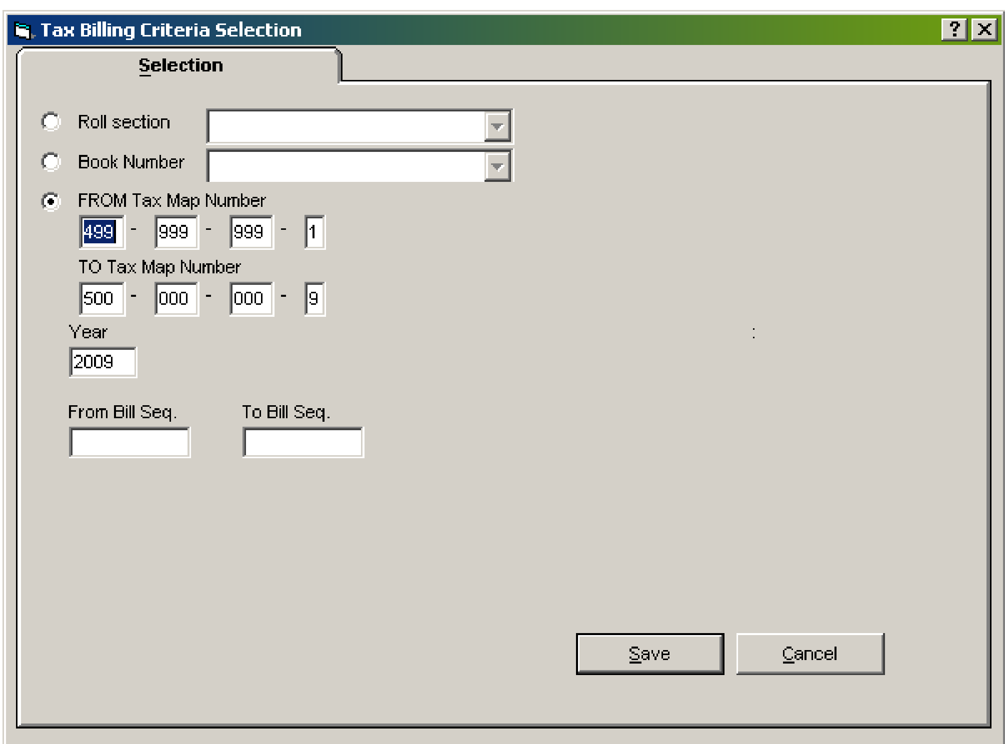
Print Multiple Bills Only: Select this option to print multiple bills only. Typically, this option is used for taxpayers with more than one property.

Print Duplicate Bills Only: If selected, the system will print duplicate bills only and disable the **Print Multiple Bills Only** selection. The bills are sent to the primary index only or the temporary owner(s) if the primary index is inactive. The bills are also sent to the names from the Mailing Index if the **Duplicate Bill Requested** option is checked in Govern.

Include Receipt Information: Select this option to print the receipt information on the duplicate bills.

Bypass Print Preview: Select this option without previewing the output.

Criteria Selection: Click **Criteria Selection** to open the *Tax Billing Criteria Selection* screen:



Saving the Computation Criteria: Select the applicable criteria and click Save to save the values used by the system to execute the process.

Select one of the three following options to delimit the computation or leave all the selections blank to compute all taxes:

- **Roll Section**: and select a **Roll Section** from the drop-down list (Table: VT_USR_ROLLSECT).
- **Book Number**: and select a **Book Number** from the drop-down list (Table: VT_USR_BOOKNO).
- **From Tax Map Number** / **To Tax Map Number** and enter a range of Tax Map Numbers to process.

Year: Enter the year in which the tax bills are saved.

From Bill Seq. / To Bill Seq. Enter a range of bill numbers to print, if applicable.

Add Levy to Parcel / Name

Overview

Run the *Add Levy to Parcel / Name* batch process to apply a levy to one or more parcels or names.

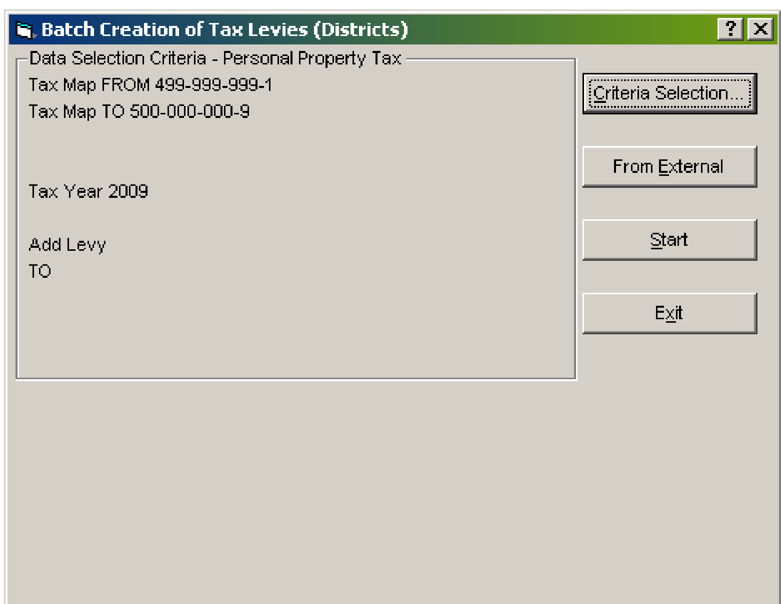
To access this Batch process, from Govern's main screen, select **Tools** > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications;

Click *Govern Batch Processing.*

In *Govern Batch Processing*, select *Tax Billing* > *Add Levy to Parcel / Name* > **Personal Property Tax**.



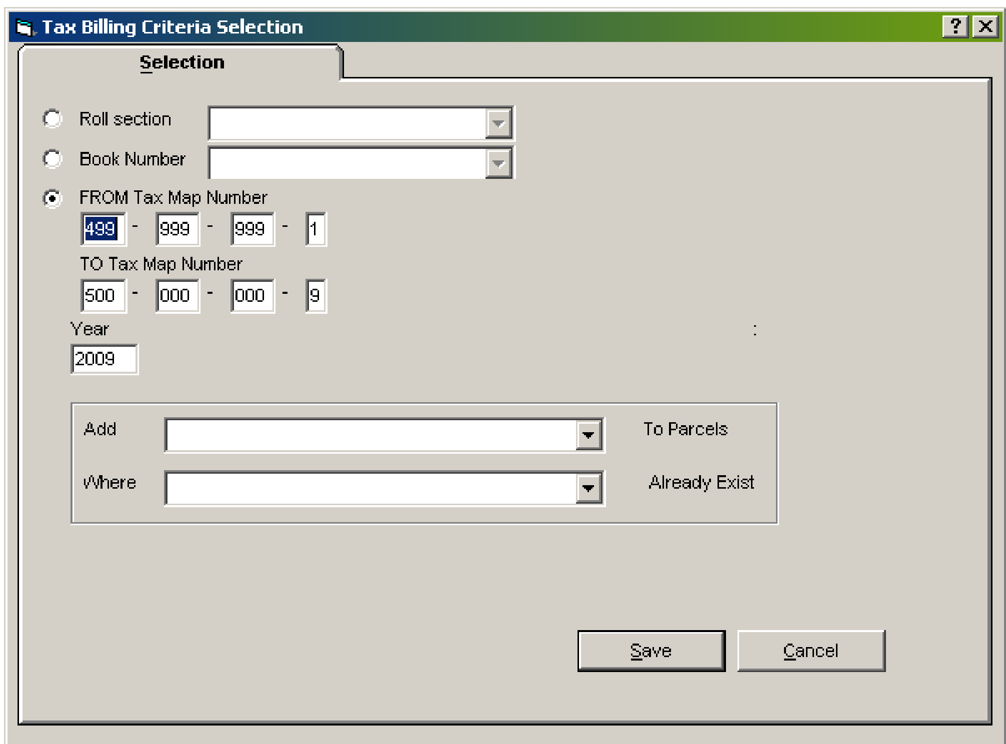
Starting the Add Levy to Parcel / Name: Select your criteria and the applicable option; then click **Start** to launch the **Add Levy to Parcel / Name**

process. A confirmation message is displayed. Click **Yes** to continue or **No** to cancel the process.

From External: Click **From External** to run the batch process on an external recordset (Table: PC_EXTERNAL).

Use Book Number as the Bill Prefix: Select this option to use the first two characters of the book number as the Bill Number prefix.

Criteria Selection: Click **Criteria Selection** to open the *Tax Billing Criteria Selection* screen.



Saving the Computation Criteria: Select the applicable criteria and click Save to save the values used by the system to execute the process.

Select one of the three following options to delimit the computation or leave all the selections blank to compute all taxes:

- **Roll Section**: and select a **Roll Section** from the drop-down list (Table: VT_USR_ROLLSECT).

- **Book Number**: and select a **Book Number** from the drop-down list (Table: VT_USR_BOOKNO).
- **From Tax Map Number** / **To Tax Map Number** and enter a range of Tax Map Numbers to process.

Year: Enter the year in which the tax bills are saved.

Add Levy Code to Parcels: Select the Levy Code from the drop-down list to add to the selected Parcels.

Where Levy Code Already Exists: Select the Levy Code (already linked to the selected parcels) from the drop-down list. If this field is left blank, the levies are applied to all selected parcels.

Partial Billing Posting

Overview

Run the *Partial Billing Posting* batch process to post all Personal Property partial billing records to the Govern Accounts Receivable module.

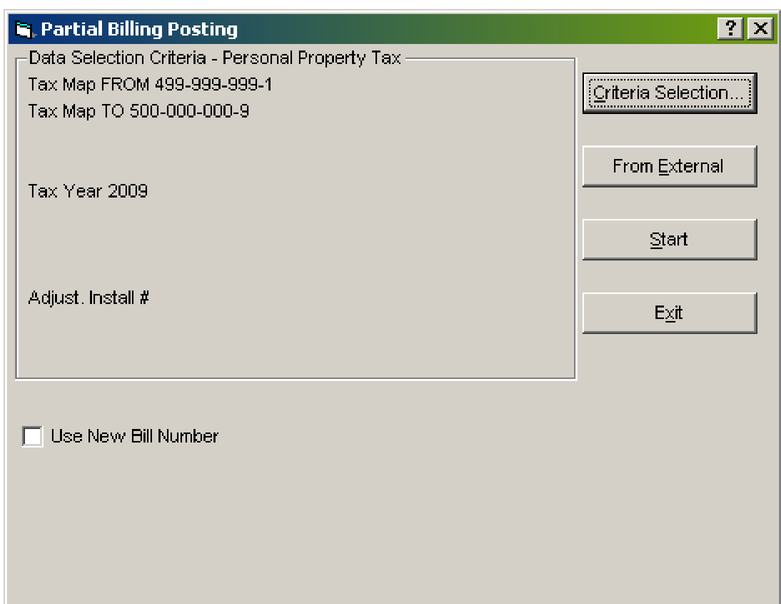
To access this Batch process, from Govern's main screen, select **Tools** > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications;

Click *Govern Batch Processing.*

In *Govern Batch Processing*, select *Tax Billing* > *Partial Billing Posting* > **Personal Property**.



Starting the Partial Billing Posting: Select your criteria and the applicable option; then click **Start** to launch the **Partial Billing Posting** process. A confirmation message is displayed. Click **Yes** to continue or **No** to cancel the process.

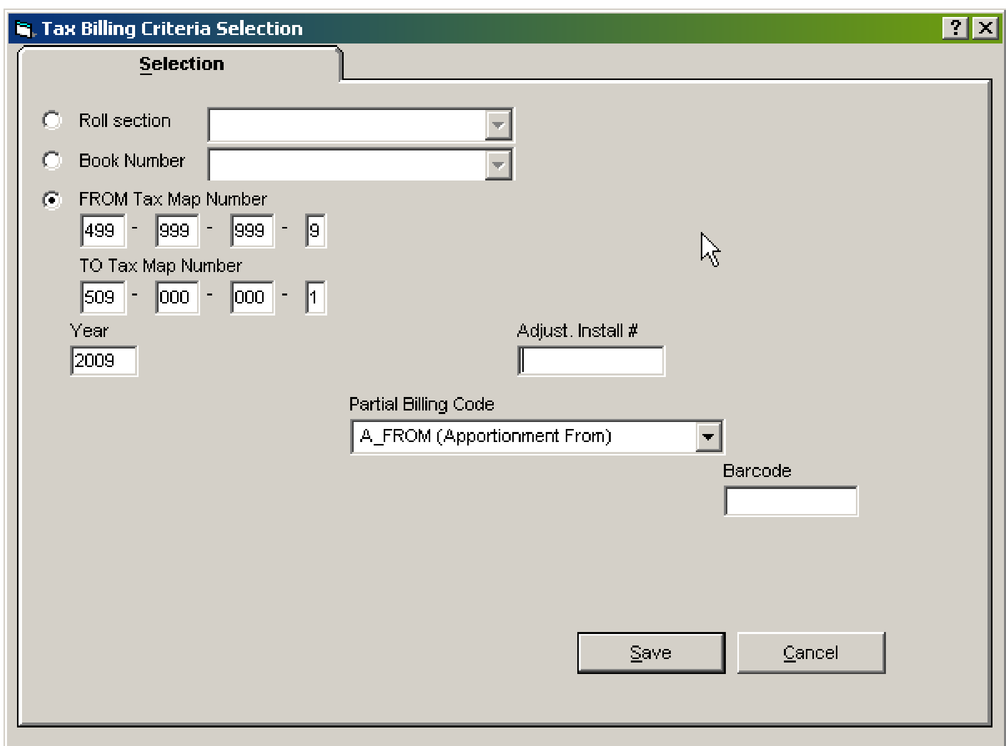
From External: Click **From External** to run the batch process on an external recordset (Table: PC_EXTERNAL).

Use New Bill Number : Select this option to generate a new *Bill Number* when a new bill is to be issued for a Property.

Use Book Number as the Bill Prefix: Select this option to use the first two characters of the book number as the prefix for the bill number.

Adjustment Install #, Bill Prefix: The information appears on the Partial Billing Posting form as selected on the Tax Billing Criteria Selection screen.

Criteria Selection: Click **Criteria Selection** to open the *Tax Billing Criteria Selection* screen.



Saving the Computation Criteria: Select the applicable criteria and click Save to save the values used by the system to execute the process.

Select one of the three following options to delimit the computation or leave all the selections blank to compute all taxes:

- **Roll Section**: and select a **Roll Section** from the drop-down list (Table: VT_USR_ROLLSECT).
- **Book Number**: and select a **Book Number** from the drop-down list (Table: VT_USR_BOOKNO).
- **From Tax Map Number** / **To Tax Map Number** and enter a range of Tax Map Numbers to process.

Year: Enter the year in which the tax bills are saved.

Adjust. Install #: If this field is left blank or if 1 is entered, then the system regenerates the original bill, otherwise enter the Installment Number. The balance is distributed on all installments equal or greater than the one entered. They will be adjusted, and the installments less than the one entered will remain unchanged.

Bill Prefix: Enter a bill prefix to be associated with all the entries being posted.

Note: This field is displayed only if the **Bill Number Prefix** option is selected on the Accounts Receivable General Parameters form in Govern Admin.

Reprocessing Partial Billing Posting: If a partial billing posting has processed for the wrong installment, use the following procedure to correct the error:

1. From the *Partial Billing* form, reprocess the request. Ensure that the posted checkbox is blank after you save the record.
2. Enter the Assessment, Levies & Exemptions as they were before the posting.
3. Perform the partial billing posting in Govern Batch with the installment option left blank.
4. Ensure that the bill and the inquiry show the original information; i.e., the amount billed on the bill and correct balance on the inquiry.
5. Re-open the Partial Billing form and make the request again.
6. Correct the entries for the Assessment, Levies and Exemptions.
7. Verify the Tax summary screen to make sure the correction has been processed correctly.
8. Perform the partial billing posting in *Govern Batch* with the installment option set to '02'
9. Print the corrected bill.

Exemption Renewal

Overview

Use the Exemption Renewal batch process to renew an exemption for a specific property or for a specified period of time.

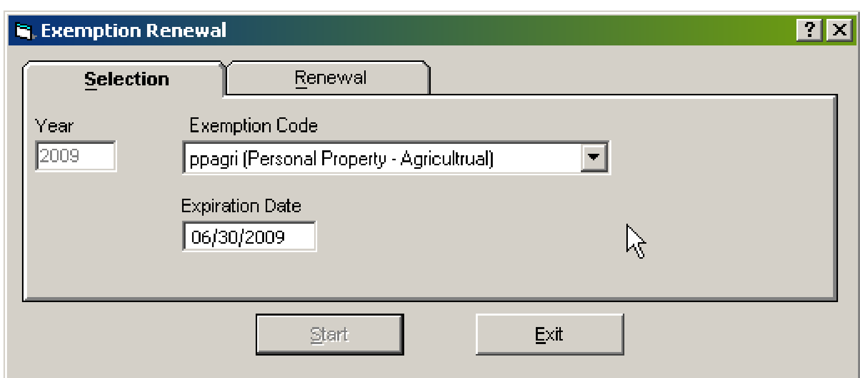
To access this Batch process, from Govern's main screen, select **Tools** > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications;

Click *Govern Batch Processing.*

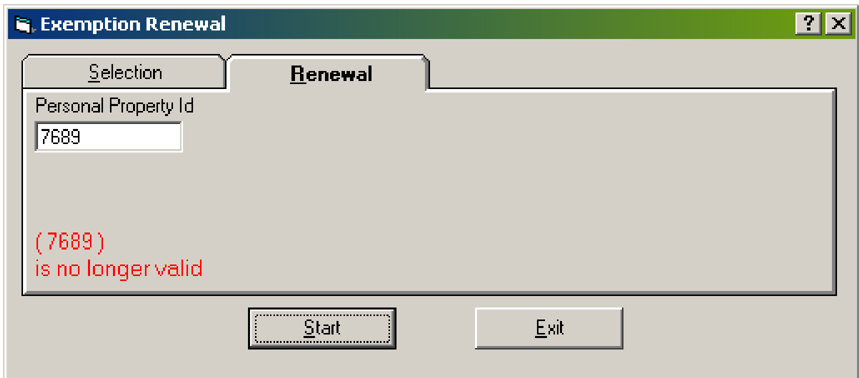
In *Govern Batch Processing*, select *Tax Billing* > *Exemption Renewal* > **Personal Property**.



Year: This field displays the default fiscal year for the default department of the user. To change the year, select **Set Default Year** from the **File** menu in Govern Batch Processing and enter the new fiscal year in the text box.

Exemption Code: Select the exemption code to renew from the drop-down list.

Expiration Date: Double-click in the field and select an expiration date from the pop-up calendar.



Start: Click **Start** to launch the Exemption Renewal process.

Personal Property ID: Enter the identification number of the personal property item eligible for the exemption renewal.

Info: After you run the process, this field displays a confirmation or error message.

Exemption Distribution (Names)

Overview

Run the *Exemption Distribution by Names* batch process to distribute the exemption amount according to the priority set in the *Exemption by Names* form in Govern Admin. See *Exemptions by Name on page 111*.

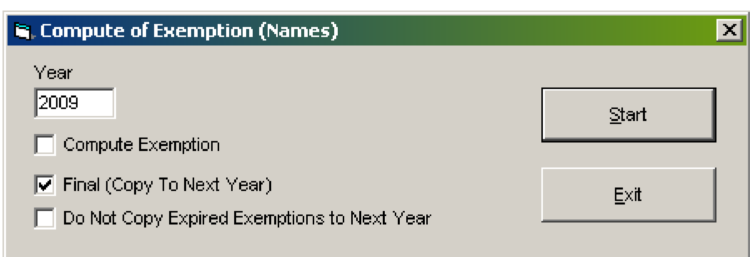
To access this Batch process, from Govern's main screen, select **Tools** > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications;

Click *Govern Batch Processing.*

In *Govern Batch Processing*, select *Tax Billing* > **Exemption Distribution (Names)**.



Start: Select the applicable option or options and click **Start** to launch the Exemption Distribution process.

Year: Enter the Year the exemptions are saved by.

Compute Exemption: Select this option to calculate and distribute the exemptions according to the priority set in the *Exemption by Names* form in Govern Admin.

Final (Copy to Next Year): Select this option if this is the final exemption calculation for the year. The computation will be carried over to the following fiscal year.

Do Not Copy Expired Exemptions to Next Year: Select this option if you do not want to copy the expired exemptions to the next fiscal year.

Re-Extract Mailing Index Batch Table

Overview

Run the *Re-extract Mailing Index Batch Table* process to regenerate the mailing index table. This process updates the bill sort sequence. When a computation is made, the sort sequence is automatically updated; however, if you make changes during the year, or if you need to print other bills, you will have to run this process, the *Generate Bill Sequence Number* process and then the *Bill Printing* process.

This process modifies the values in the TAX_NOTICE_1 & TAX_NOTICE_2 columns in the PP_POST_MASTER table. If a balance is due on the first installment, the system assigns “-1” in TAX_NOTICE_1. If a balance is due on the second installment, “-1” is assigned in TAX_NOTICE_2.

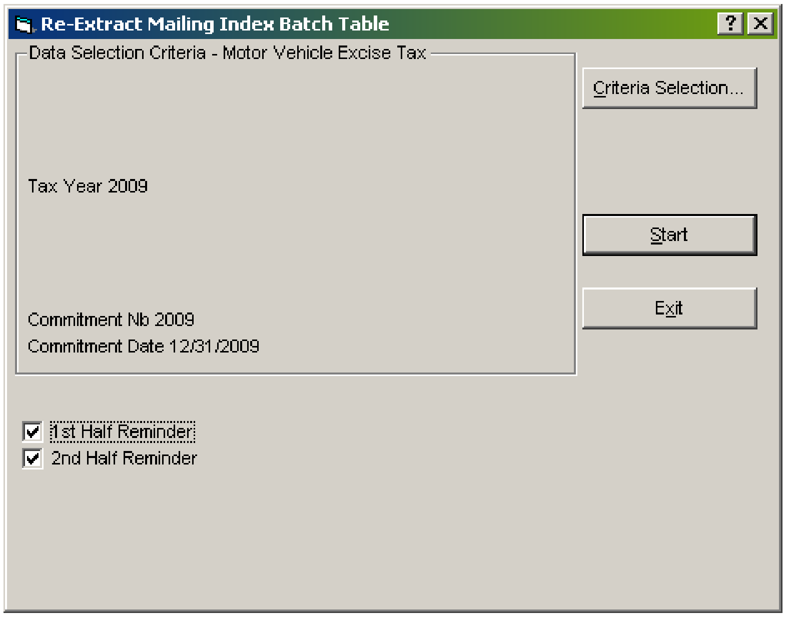
To access this Batch process, from Govern’s main screen, select **Tools** > **Batch Processing (Govbat32.exe)**

OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications;

Click *Govern Batch Processing.*

In *Govern Batch Processing*, select *Tax Billing* > *Re-extract Mailing Index Batch Table* > **Personal Property**.



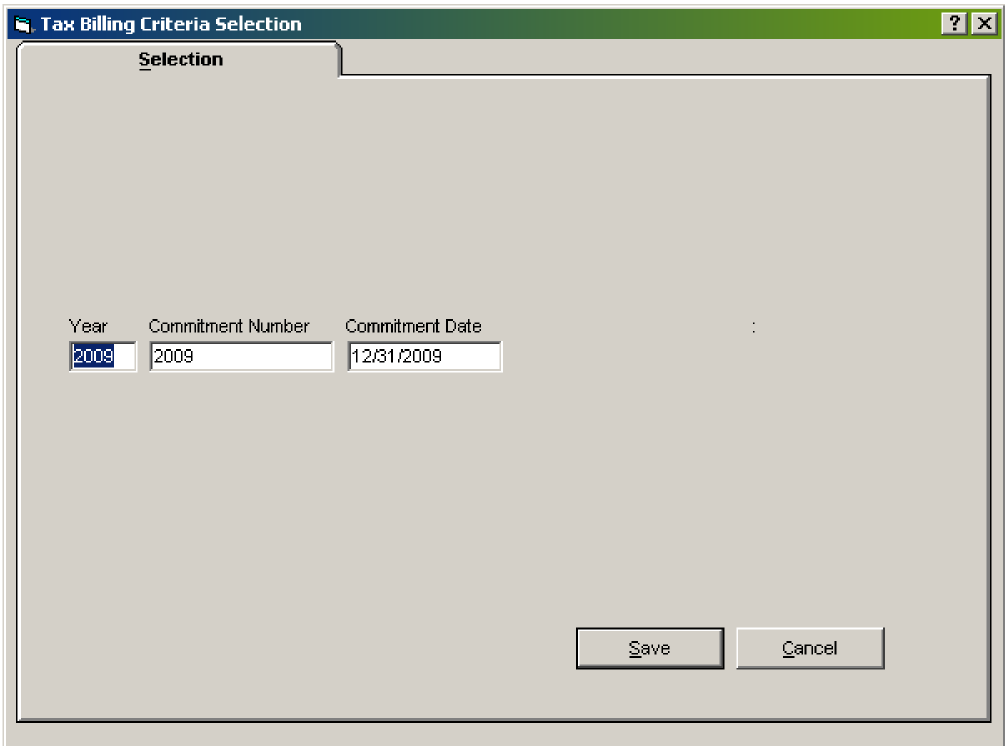
Start: Select the applicable option or options and click **Start** to launch the process.

1st Half Reminder: Select this option to extract the names that have a remaining balance for the first half only.

2nd Half Reminder: Select this option to extract the names that have a remaining balance for the second half only.

Note: If both options are selected, the system extracts the names that have a remaining balance after the first and second half.

Criteria Selection: Select **Criteria Selection** to open the *Tax Billing Criteria Selection* form.



Saving the Computation Criteria: Enter the applicable information and click **Save** to save the values and return to the Personal Property *Re-Extract Mailing Index Batch Table*.

Year: Enter the year in which the tax bills are saved.

Batch Update

Overview

Run the *Batch Update* process to update any field in a Tax Billing module.

Note: Use caution when running this process..

To access this Batch process, from Govern's main screen, select *Tools* > **Batch Processing (Govbat32.exe)**

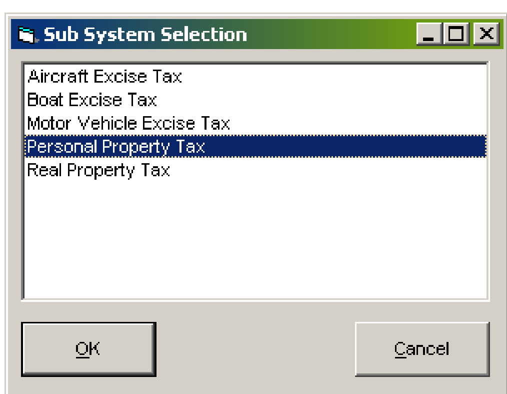
OR

Click **Applications** in the *Side Navigation Bar* to display Govern applications;

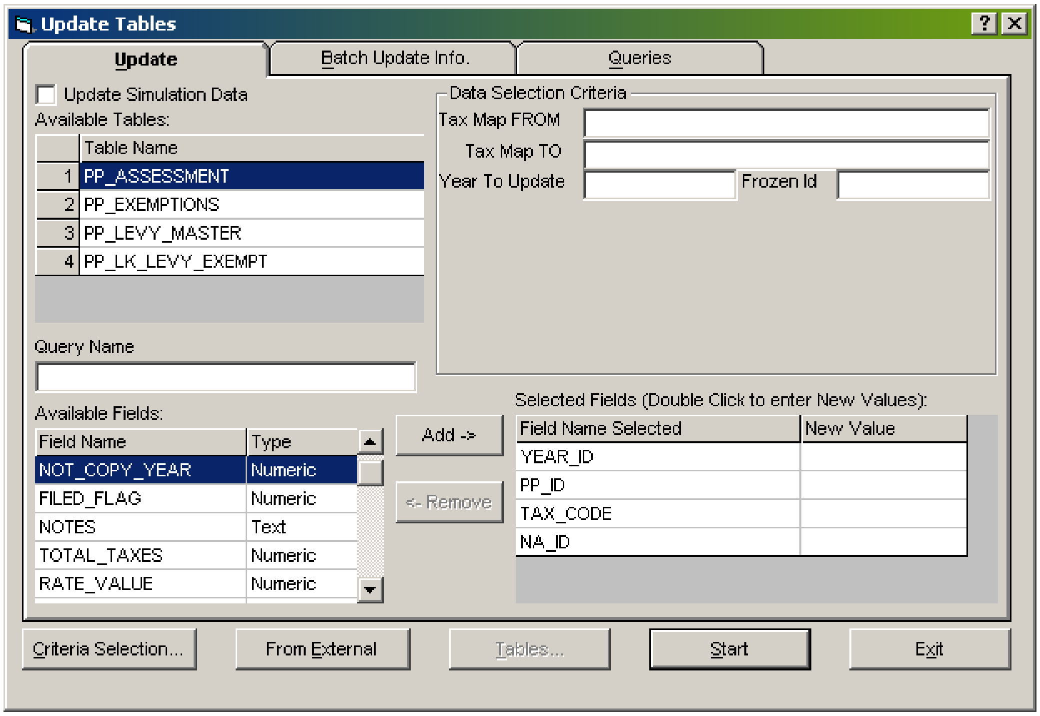
Click *Govern Batch Processing.*

In *Govern Batch Processing*, select *Tax Billing* > **Batch Update**.

The *Sub-system Selection* screen appears.



Note: You need to select the criteria and the fields from each table you want to update. Ensure that you have a full backup of your database before proceeding.



Note: You can save the update queries used for the *Batch Update* process in the Mass Appraisal and Tax Billing modules. You can then select the queries from a drop-down list and execute them as needed.

Update Simulation Data: Select this option to update the simulation data.

Available Tables: This field lists the tables that can be updated in the sub-module.

Query Name: Enter a name for the query. This query can be selected from a drop-down list on the Queries tab.

Linking the Update to the External System: Click **From External** to use the parcel identification numbers (P_ID) stored in PC_EXTERNAL instead of using ranges and conditions.

Adding a Field to the Table: Select a field in the *Available Fields* section and click **Add**. Alternatively, double-click on the field. This moves the field to the *Selected Fields* section.

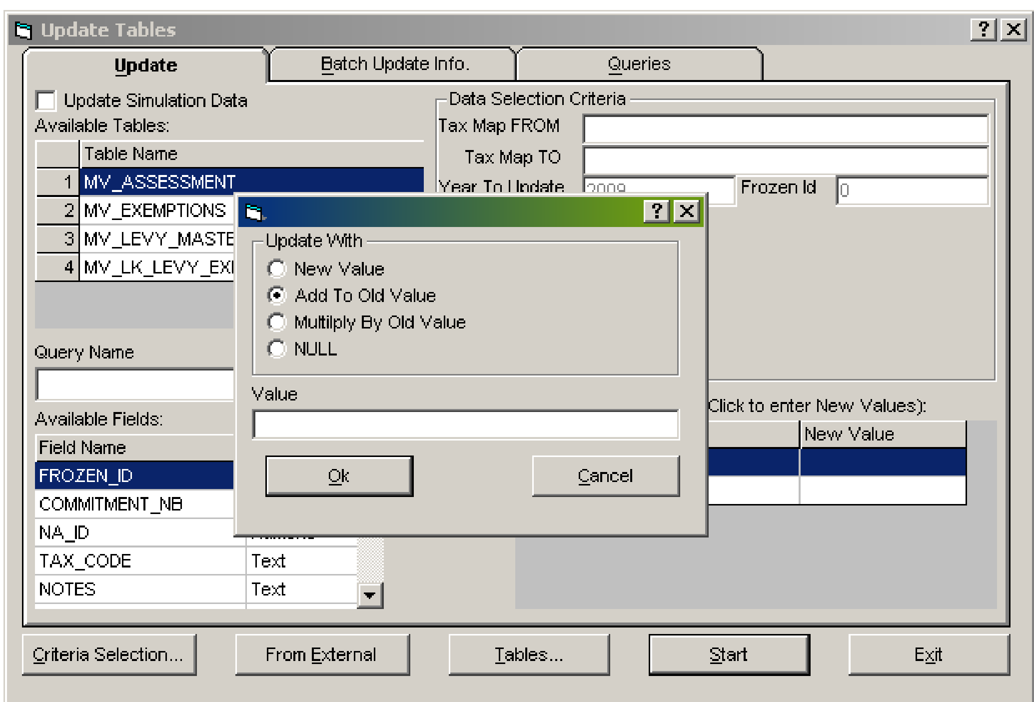
Removing a Field from the Table: To delete a field from the *Selected Fields* section, select the field and click **Remove**.

Viewing / Modifying a Field Value: Double-click the field in the *Selected Field* section. The *New Value* screen is displayed with the field's value. Modify the value on this screen.

Updating a Database Table

To update a database table, complete the following steps.

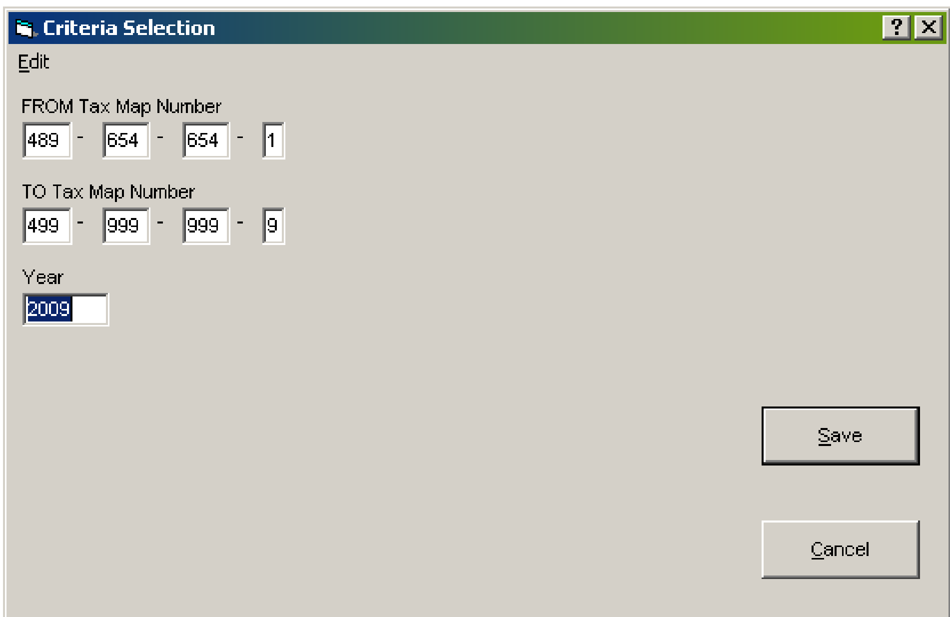
1. Select the table in the *Table Name* section of the form.
2. Select the field to update in the *Available Fields* section.
3. Click **Add** to move the field to the *Selected Fields* section.
4. Follow step 5 to enter a value manually or skip to step 7 to use the value from a field in another table.
5. Double-click on the field in the *Selected Fields* section.



6. Select **New Value** and enter the value in the text box or select **NULL** to use a null value.

7. Select the field in the *Selected Fields* section and click **Tables**. This opens the *Browsing* screen.
8. Highlight the table you want to update and then click **Select**. The *Code Selection* screen appears.
9. Select the field you want to use.
10. Click **OK**.

Criteria Selection: Select **Criteria Selection** to open the *Tax Billing Criteria Selection* form.



Saving the Computation Criteria: Enter the applicable information and click **Save** to save the values and return to the *Batch Update* form.

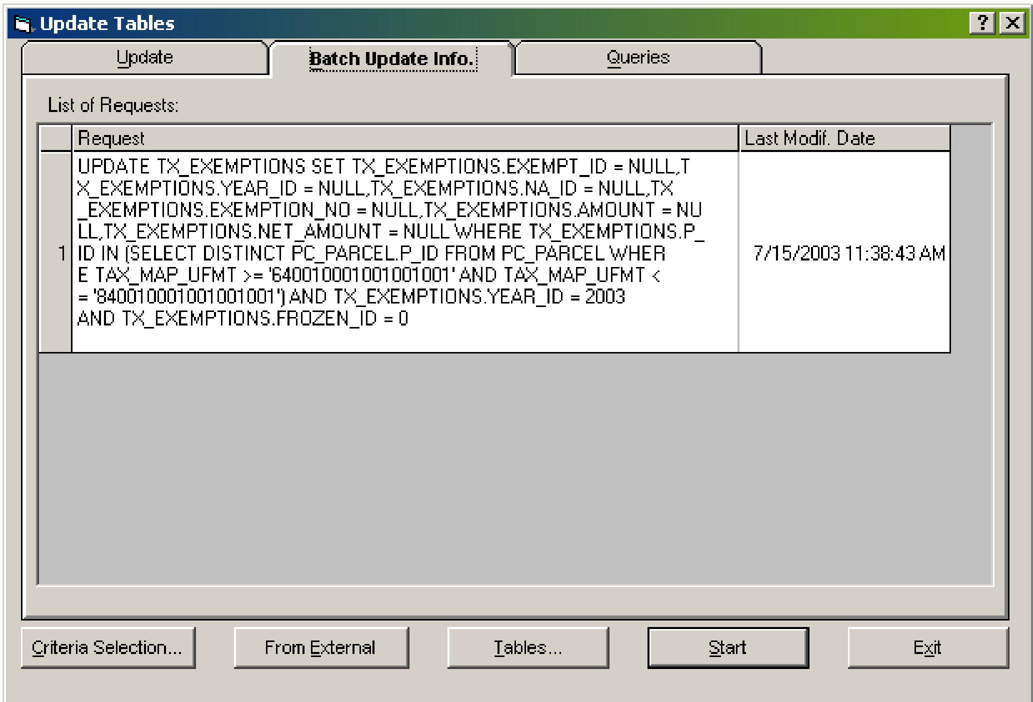
From Tax Map Number / To Tax Map Number: Enter the range of tax map numbers to update or leave these fields blank to update all parcels.

Year: Enter the year in which the tax bills are saved.

Starting the Batch Update Process: Click **Start** to launch the *Batch Update Process* for the selected table.

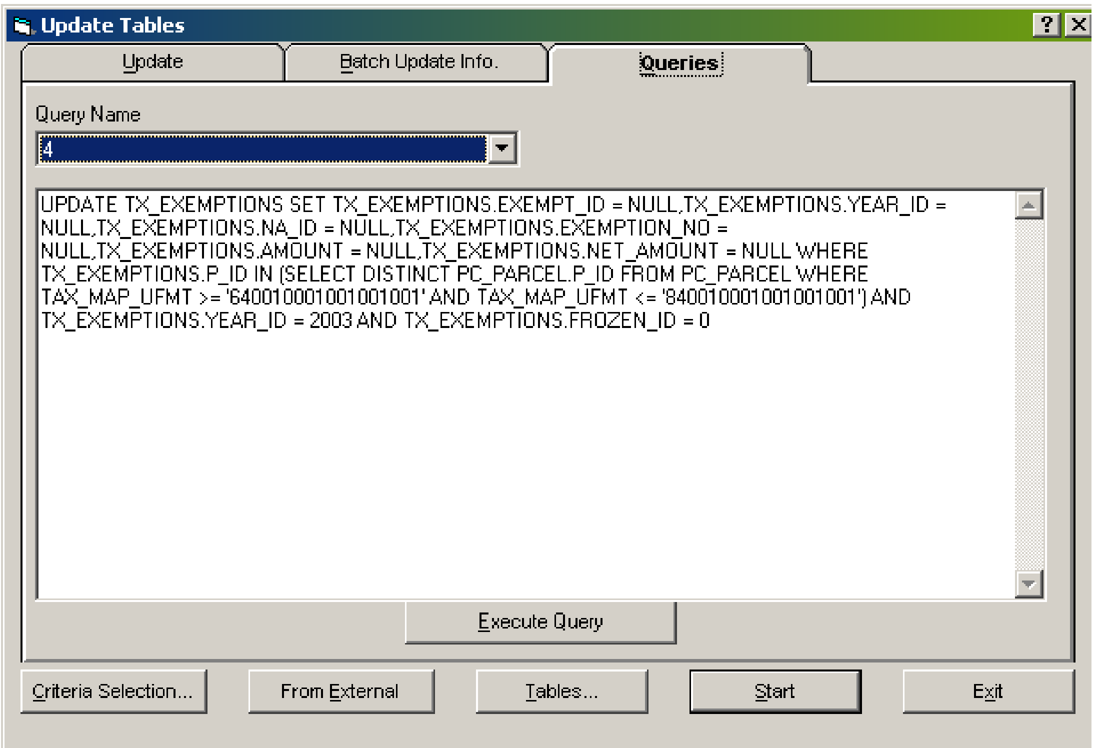
Viewing the Update Information

Select the **Batch Update Info** tab to view a list of all the tables previously updated along with the date of modification.



Queries

Select the **Queries** tab to run a query that has been previously created on the **Update** tab.



Query Name: Select the query previously created on the Update tab.

Execute Query: Click Execute Query to run the query.

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