

TAS TRAINING

DHCA

MCG, Department of Finance

Agenda



Part 1

- Learning objectives
- What's the Same: Overall Process & Data
- What's New
- Error Handling

Part 2

- System Demo
- Hands on practice

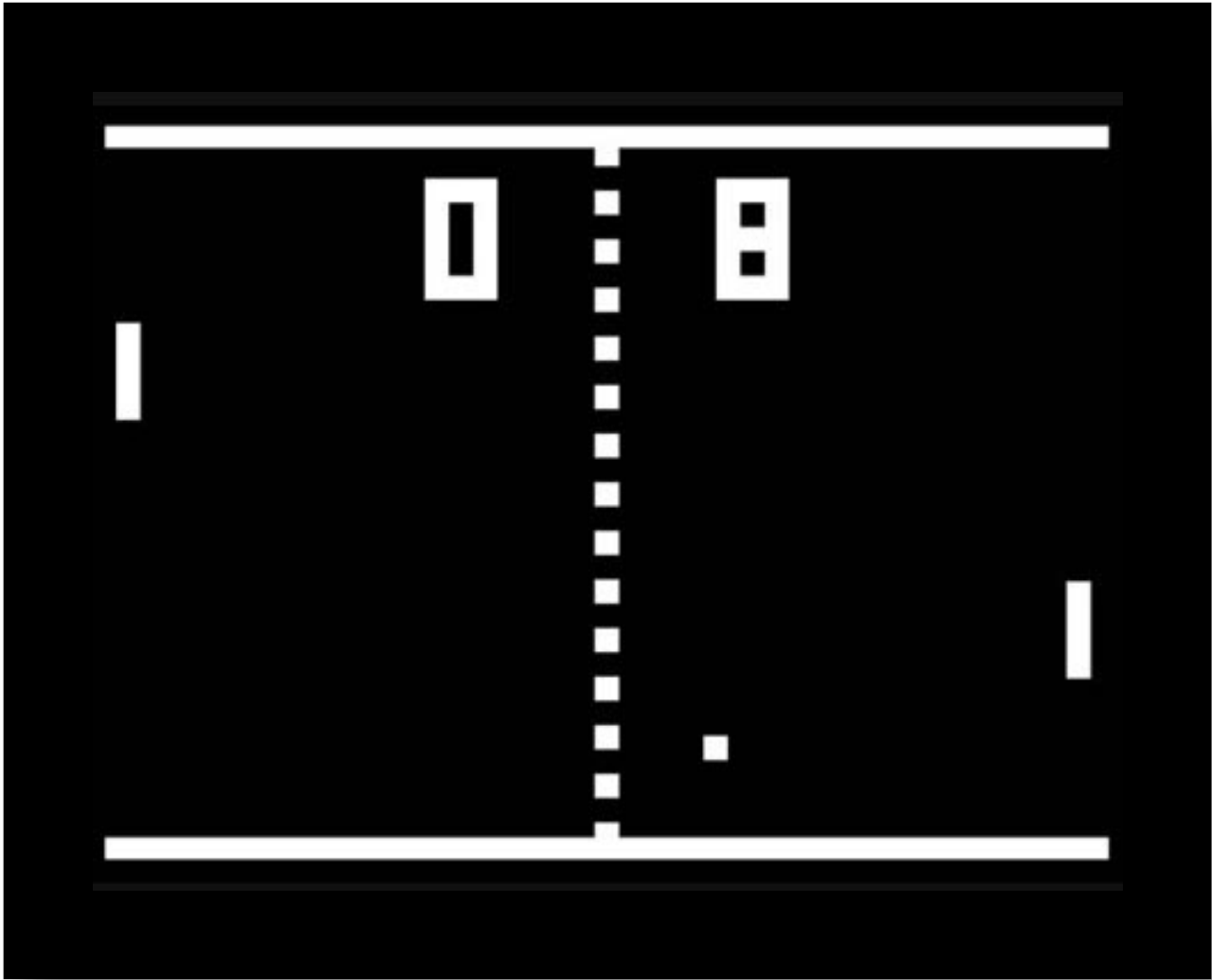
Part 1 - General Content

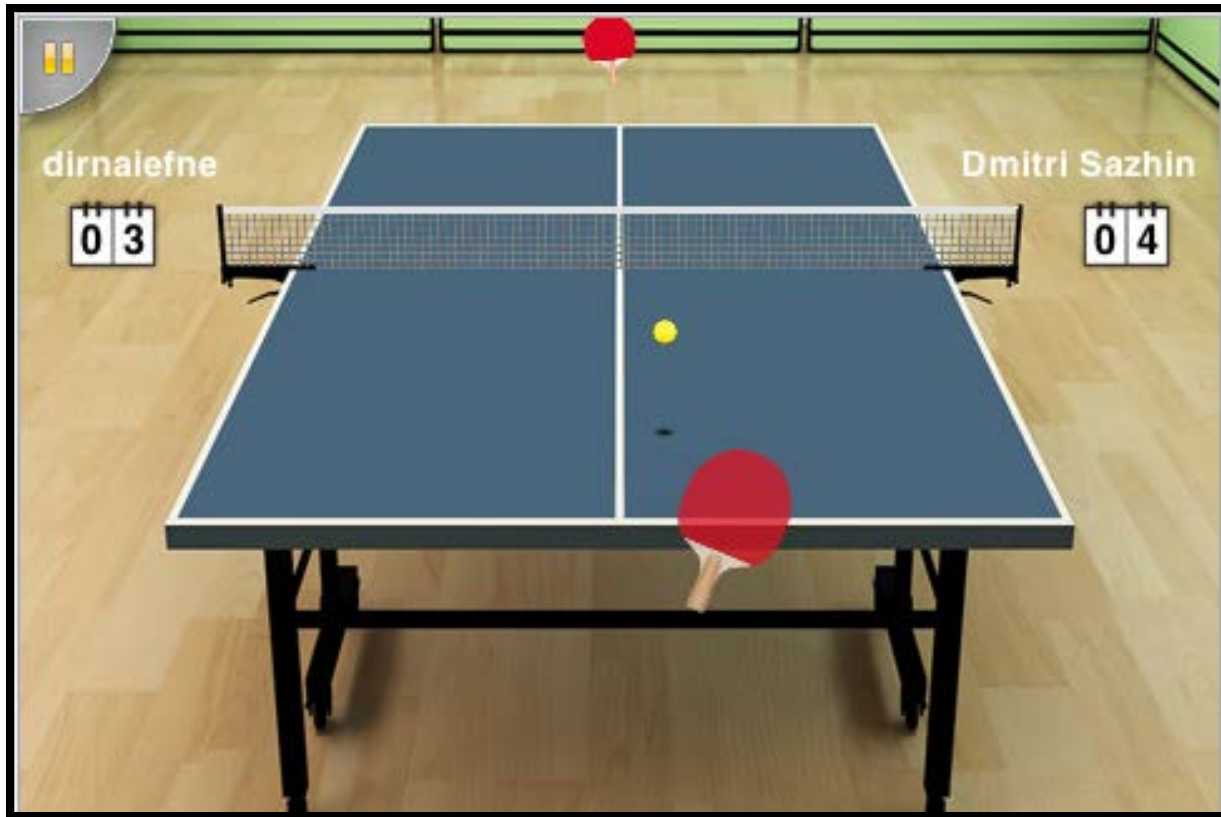
Presented by Diane Bloom & Skyler Grubbs

Goals for Today's Session



- ❑ **Global understanding of end to end process**
- ❑ **Understanding your role as a TAS user**
- ❑ **Learning how to perform functions in TAS**
- ❑ **Understanding business and system processes as it relates to TAS**
- ❑ **Knowing your resources**





Why a new TAS?

Legacy Transaction Menu

1--> NAME/ADDRESS MAINTENANCE

2--> GENERAL INQUIRY

To operate the demonstration as a legacy application, do the following:

- 1). Select option 1.
- 2). Respond to customer number prompt
- 3). View the customer name/address di
- 4). Press PF3 to return to this menu.
- 5). Select option 2.
- 6). Respond to customer number prompt
- 7). View the customer detail display.
- 8). Press PF3 to return to this menu.
- 9). Press PF3 again to return to the

Enter Option ==> █

From this ... to this!



Home Page

[MCG TAX Assessment System Overview](#)

MCG TAX Assessment System Overview

- coming soon

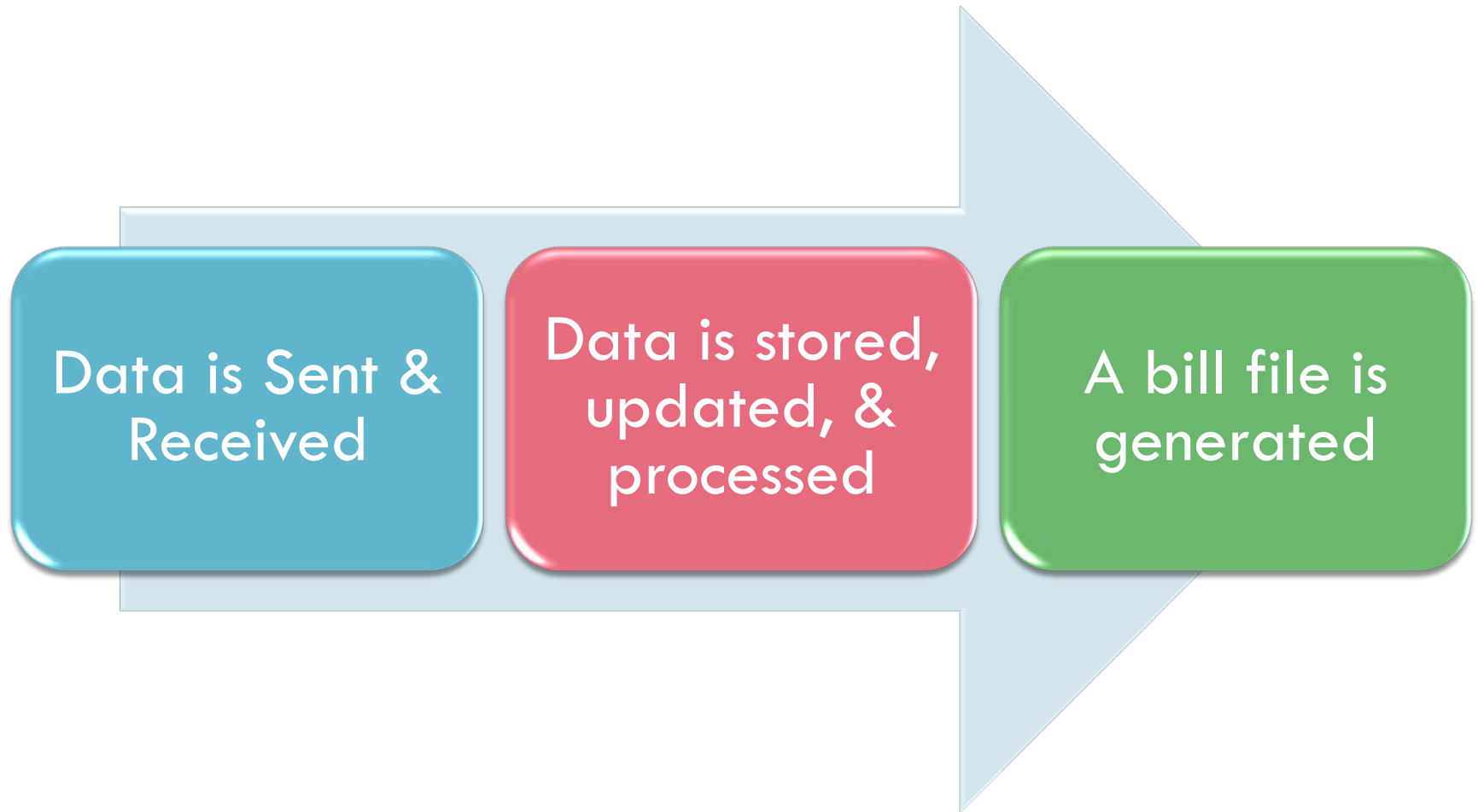
[Batch Job Overview](#)

[Agency Contact Information](#)

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Best viewed with IE 7.0 and higher



What's the overall process?



Let's talk data

DHCA contributes data with data throughout the year via the TAS GUI.

The GUI will allow DHCA users to log, review, validate, process, and update charges.



Monthly Updates...

- Monthly revisions are processed into monthly revised bills.
- Charges on the annual bill are not carried over from previous levy years
- Additional charges to the same account in the same levy year must be added (cumulative) to the amount of the original charge (see example, p. 3 of 26)

What about issues?

If you experience any system issues, please contact the help desk.

Issues will be triaged to either FIN-IT or Treasury. You will be contacted promptly.



Part 2 – Demo & Lab

System Demo – Andrew Akinola

Exercises in TAS – Ying Li

Demo & Exercises

1. Logging in

- ePortal
- TAS Test

2. Home Page

- Dashboard
- Batch Job Overview
- Agency Contact Information

3. View Property

- Search for account
- Viewing complete record

4. Manage Charges

- View Summary
- Manage Charges (Add, Edit, and remove charges)
- View Pending Revised Bills

5. View Transaction Change Log

Recap

Did we meet the goals we set?

What questions do you still have?

What's next?

What are your resources moving forward?

- Quick Start Guides
- Online tools
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