

Montgomery County Government

Department of Finance



Tax Assessment System (TAS)

Operations Guide

Appendix B - State of Maryland

Version 1

05/15/2014

State of Maryland: Table of Contents

- State of Maryland: Table of Contents 1
- Document Structure 3
- Roles & Responsibilities..... 3
 - General Data Flow 3
 - General Activity Flow 4
 - Annual Process 4
 - Full State file* 4
 - Home Owner Credit file* 4
 - Monthly & Quarterly Contribution 4
 - Real Property 4
 - Personal Property..... 5
 - Contributions: Additional Terms & Information 5
 - Rollover 5
 - Rollover and annual billing 5
 - Transfers 5
- State Data Inputs 6
 - SDAT 01 (Real Property)..... 6
 - SDAT 02 (Homeowner Credit)..... 7
 - SDAT03 (Personal Property) 7
 - SDAT04 (New Construction)..... 7
- Handling Operational Issues 8
 - Contributor infrastructure issues 8
 - Extract Issues..... 8
 - Bad Data*..... 8
 - Input issues 8
 - No File* 8
 - Bad Data*..... 8
 - General Operations Issues 9
- Navigating the State of Maryland GUI Screens 10
 - Logging In 10

- Home Page 11
 - Figure 1 – State of Maryland TAS Home Page..... 11
- Batch Job Overview..... 12
- Real Property Tax Annual Billing Dashboard..... 13
- Agency Contact Information 14
- View Property 15
- Select State of Maryland functions 21
- Manage Parking Exemptions 22
 - View PK Summary 23
 - Manage PK Exemptions 24
 - View Pending Revised Bills 26
- Manage Subdivision Codes..... 28
- Recaptured Home Owner Credits 30
- View Reports..... 31
 - View GUI Pending Revised Bills 32
 - View Transaction Change Log 33
 - View Error Summary..... 37
 - View Error List by Batch..... 37
 - View Errors by Batch 38
- Glossary of Terms 39

Document Structure

The State of Maryland appendix is an extension of the TAS Operations Guide. The appendix describes TAS-related business rules, system functions, and roles and responsibilities for the State of Maryland. For a high level overview of content provided in this document, please refer to the TAS Operations Guide.

Roles & Responsibilities

The Montgomery County Department of Finance (Division of Treasury & Division of FIN-IT) is responsible for all data collection, staging, and consolidation pertaining to tax billing. These billing activities include annual, supplemental and revised billings. Annual billing focuses on processing original assessments, exemptions and credits. Revised billing focuses on adjusting assessments, credits, exemptions, charges, and other items to reflect any billing changes on the property tax record that occur subsequent to the last billing. Both personal property and public utility tax billing are included in this process.

The State of Maryland Department of Assessments and Taxation (SDAT) is a key contributor in this process as they provide Treasury with data for real and personal property as well as any State credits, charges, or exemptions that may apply. In some cases, Treasury provides this data to additional contributors in the form of extracts.

General Data Flow

The data flow activities start with imports from the State which then get placed into TAS. The process for transferring data files is now facilitated by the Enterprise Service Bus (ESB) which automates file delivery and retrieval. In addition, ESB applies business rules to validate the data before it is processed. Some data is also loaded through the TAS Graphical User Interface (GUI).

The State provides data during annual billing, then quarterly and monthly updates via the SDAT files (see Table 1 summary). The State uses the TAS GUI to manage parking exemptions and subdivision codes. Users from the State may also look up property information on individual accounts.

Table 1: Summary of Data Flow Activities

Annual Upload Activities
Full State File (SDAT01)
Home Owner Credit (SDAT02)
Quarterly Upload Activities
New Construction File (SDAT04)
Monthly Upload Activities
Full State File Updates (SDAT01)
Homeowner Credit Updates (SDAT02)
Personal Property File (SDAT03)

General Activity Flow

Tax activities begin with an annual tax bill which is produced at the beginning of a Levy year. During this annual billing, all real properties are billed for the annual State, County and Municipal taxes. Fees and charges applied by other contributors are included as well.

There are revisions to Real and Personal Property tax bills that occur during the Levy year. Contributors either make updates using the provided GUIs or batch file uploads. Public Utility billing also occurs during the Levy year and is described in more detail below.

Annual Process

The annual billing process performed by Treasury is a substantial activity in which State, County, & Municipal data is aggregated to produce 340,000+ annual property bills. The process is initiated with the SDAT01 & SDAT02 files.

Full State file

The SDAT01 file is a monthly file that contains all of the Real Properties for Montgomery County. Throughout the Levy year, after Rollover, this file updates critical information within the Montgomery County's MUNIS system, but does not generate revised bills that go to property owners.

However, during the period between the Annual bill and before the State Rollover these files are processed with information that could generate real property revised bills. This is the only time of the year when the SDAT01 file is processed in this manner to create revised bills.

Home Owner Credit file

Twice a month the SDAT02 file is received from the State. These home owner credits are applied to TAS and revised bills are generated to reflect the monetary change.

Monthly & Quarterly Contribution

The State is responsible for two different kinds of tax assessments:

- (1) Real property
- (2) Personal Property

Since TAS maintains a history of prior years' activity, the State can easily access and reference the data in order to create revised bills for both current and previous years.

Real Property

Real property represents the majority of the bills produced by Montgomery County's TAS and MUNIS systems. There are roughly 340,000 real properties in Montgomery County, each of which receives an annual bill.

The State provides new construction assessments for real property. New Construction supplemental billing occurs quarterly as triggered by the SDAT04 file, which contains

information related to improvements added to real properties during the last quarter. The new construction files are issued four times a year, three of which are processed to create what are called supplemental bills. The fourth is rolled into the annual processing and it appears with all the other items on the annual bill.

Personal Property

The Personal Property file, issued by the State, represents specific taxable business assets that have been reported on annual personal property tax returns. Personal Property billing activities are triggered by the State file (SDAT03). Twice a month, ESB will pick up these files from the State and put them into the TAS to generate the output file. The output file is then picked up by ESB and delivered directly to MUNIS for processing.

Public Utility

Public utility assessments have two components:

- (1) The property on which facilities reside, which is analogous to Real Property
- (2) The facilities' infrastructure, such as towers in the case of electric companies, which is similar to Personal Property

Based on certifications provided by the State, Treasury uses the TAS GUI to enter the Public Utility assessment information. This process triggers a billing request and generates a file for the public utility assessments. ESB will then pick up and deliver to MUNIS directly for processing.

Contributions: Additional Terms & Information

Rollover

Rollover is an annual process by which the State switches from current to next levy year in their system in order to update tax records for the next annual run. From the time of rollover until the time of annual billing all of the activities in the State system are focused on the next levy year's activities. During this time, the SDAT01 file is still generated monthly. Although that file does not contain any revised bill information, it does contain information that would update the MUNIS. As each monthly SDAT01 file arrives and is processed, TAS checks for one of six changes that could have occurred in a given property item (i.e. owner name change) which trigger MUNIS to generate a revised bill.

Rollover and annual billing

The annual billing process, which generates the initial tax bills for all the properties in Montgomery County, happens at the beginning of the fiscal year. Processing activities during May, June, & July are handled in the annual process.

Transfers

By Maryland state law, any property that transfers before July 1 needs to be on the annual tax bill. When the annual bills are produced, properties that have not had the transfers completed are

not included. Instead they are put into the SDAT01 file and sent for processing as revised bills for the current Levy year. The State's system is locked into the current Levy year, even after the annual bills have been produced in order to finish transfers. Once that is completed, rollover is executed.

State Data Inputs

There is both a method and a process by which data is received by TAS. "Method" is the way in which data is retrieved and moved into the system. The ESB is the file-moving mechanism which has built-in intelligence and the ability to notify of success or failure. "Process" is what happens to data when it has been ingested into the TAS. All data destined for the TAS database will go through a staging location where it is checked for errors.

Depending on the contributor, data files are either sent or placed somewhere inside the data infrastructure whereby the data files are retrieved and moved into the TAS environment. ESB is the actual mechanism that moves the data, which has built-in intelligence and the ability to notify of success or failure.

For the State files, the ESB looks for data placed on the State's server, which is considered external to Montgomery County. Once data is detected, and based on the filename, the ESB will route it to one of many staging areas for the TAS system. Each of the files from the State are processed independently as they serve different purposes.

SDAT 01 (Real Property)

1. The SDAT01 file must be named "**RLFILE16.zip**" and placed into the designated folder located on the SDAT server: **vol1\outside\PDR**.
2. A member of the FIN-IT team will manually retrieve this file from SDAT's FTP server and place this file in the designated folder on the County's network for ESB to process.
3. ESB unzips the file and places it into the SDAT01 Staging Table in TAS. Business logic and rules are applied as the data goes from the Staging Table into Production.
4. TAS will process as much of the data as possible, even if errors are found in the file.
5. A notification is sent to FIN-IT to indicate success or failure of the input process.

SDAT 02 (Homeowner Credit)

1. The SDAT02 file must be named using the **current date (yyyymmdd.htc)** and placed into the designated folder located on the SDAT server: **voll\outside\month\HTC**.
2. A member of the FIN-IT team will manually retrieve this file from SDAT's FTP server and place this file in the designated folder on the County's network for ESB to process. ESB unzips the file and places it into the SDAT02 Staging Table in TAS. Business logic and rules are applied as the data goes from the Staging Table into Production.
3. TAS will process as much of the data as possible, even if errors are found in the file
4. A notification is sent to FIN-IT to indicate success or failure of the input process

SDAT03 (Personal Property)

1. The SDAT03 file must be named using the **current date (yyyymmdd.pdt)** and placed into the designated folder located on the SDAT server: **voll\outside\mont\mbes\county**
2. A member of the FIN-IT team will manually retrieve this file from SDAT's FTP server and place this file in the designated folder on the County's network for ESB to process. ESB unzips the file and places it into the SDAT03 Staging Table in TAS. Business logic and rules are applied as the data goes from the Staging Table into Production.
3. TAS will process as much of the data as possible, even if errors are found in the file.
4. A notification is sent to FIN-IT to indicate success or failure of the input process. **Note:* Only the data (pdt.) file is needed; the report file (.prp) can be excluded from this process. This interface may be created at a later date if required by Treasury.

SDAT04 (New Construction)

1. The SDAT04 file must be named using the **current date (yyyymmdd.NCP)** and placed into the designated folder located on the SDAT server: **voll\outside\mont\real**.
2. A member of the FIN-IT team will manually retrieve this file from SDAT's FTP server by the 5th of March, June, and September and place this file in the designated folder on the County's network for ESB to process. ESB unzips the file and places it into the SDAT04 Staging Table in TAS. Business logic and rules are applied as the data goes from the Staging Table into Production.
3. TAS will process as much of the data as possible, even if errors are found in the file.
4. A notification is sent to FIN-IT to indicate success or failure of the input process.

Handling Operational Issues

User issues generally fall into four major areas.

- Contributor infrastructure issues
- Extract issues
- Input issues
- General Operational issues

Each of these issues has a unique set of characteristics and requires specific troubleshooting and resolution.

Contributor infrastructure issues

Should the contributor use their own FTP server, the physical environment must be available when the County ESB needs to download or deliver a file.

The passwords and access must be correct and the files being picked up need to be in the specific location with the correct naming convention. Should any of these not be the case, the County will not be able to retrieve or provide data to that environment.

Extract Issues

When an extract is created, the contributor will receive a notification which includes a link providing the location of the data.

Bad Data

The only category of error is bad data in the file. As TAS is creating the extracts there should be no issues. However, if data becomes corrupted during the process, the files could contain bad data.

FIN-IT will work directly with the contributor and their technical resources to resolve these issues. Extracts are formatted with specifications from contributors. Therefore there should be no file with bad data unless it was corrupted in the process of creation. In that case, the new file would need to be created and then sent to the contributor.

Input issues

There are two major conditions which cause upload issues: (1) There is no file upload or (2) During the process in which ESB applies the TAS Business rules against the data content, the file is found to contain bad information.

No File

The ESB jobs will indicate when there is no file. Because the ESB jobs are triggered on the presence of files, they will remain in continual wait mode.

If there are issues with loading the files, FIN-IT will receive notification and contact the contributor to identify and resolve the issue.

Bad Data

Bad data in the file can be detected in two areas:

- (1) When the ESB transports files from the source to the staging tables of TAS where business rules are applied. The contributor, FIN-IT, and Treasury will receive a success or failure notice indicating the status of the data load.
- (2) When TAS processes data from the staging tables and applies the business rules associated. The business rules dictate whether the data will be saved in the TAS database or rejected. Contributors are required to enter new data to replace that which is rejected.

If there are errors in the file, it will be returned to the sender for correction. Depending on the rule being applied, TAS will either reject the file entirely, or it will ingest error-free data and return the remainder to be corrected.

Should there be a failure indication, FIN-IT and the Division of Treasury will be notified. FIN-IT will coordinate with the contributor to resolve the issue.¹

General Operations Issues

There are a number of general areas where contributors may need assistance. These are generally centered on items such as access, log-ins, passwords, user set-up, etc. Should a contributor have issues in these areas, they should contact the MCG Help Desk at **240-777-2828**.

TAS users who do not work for Montgomery County Government must have an Active Directory (AD) account in order to receive support from the MCG Help Desk. In the case that a new employee (internal or external) requires an AD account for access to TAS, the MCG Help Desk must be notified. The same process applies if an employee no longer requires access (for example, if they transfer to a different position, terminate employment, etc.).

¹ This rule does not apply to DEP SWS, DEP Storm Water, DHCA, & WSSC. These contributors will be responsible to handle the issue independently.

Navigating the State of Maryland GUI Screens

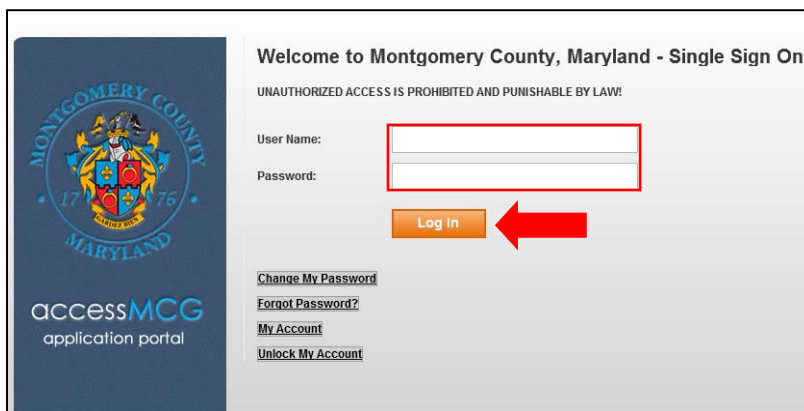
Since the State processes transactions throughout the levy year, their interface is focused on processing SDAT files, managing special charges and credits (i.e. parking exemptions and homeowner credits) and reviewing transaction logs.

The GUI's primary function is to upload data from each SDAT file, provide the State with data regarding the status of prior uploads and charges, and generate revised bills.

The data upload process uses the ESB to move data into the staging tables of TAS. Once successfully loaded there, State users can complete the upload process through the TAS GUI. The information below provides instructions for each screen with supporting images.

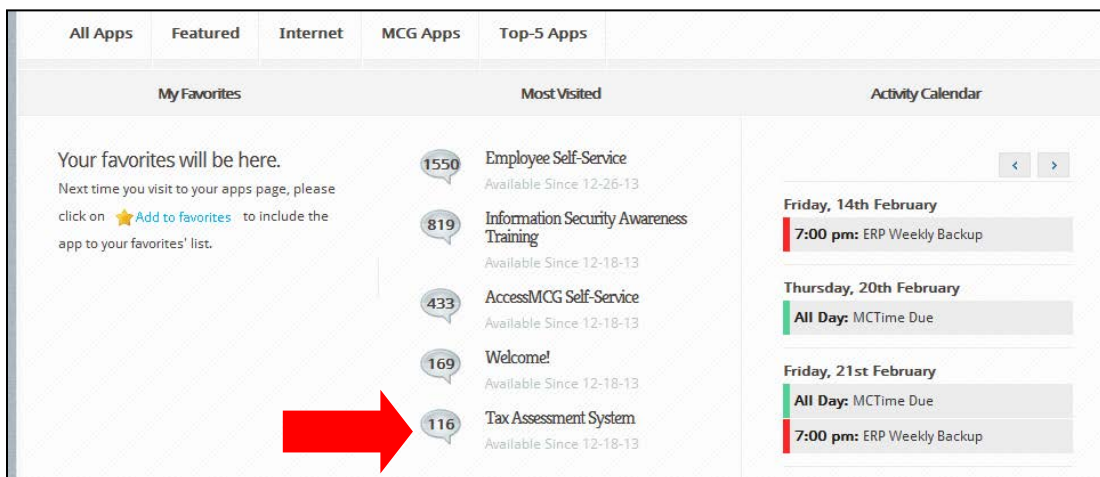
Logging In

1. Access the MCG ePortal at: <https://eportal.montgomerycountymd.gov>
2. Enter your user name and password.
3. Click Log In.



The screenshot shows the login page for the Montgomery County, Maryland Single Sign On portal. On the left is the county seal and the text "accessMCG application portal". The main area contains the title "Welcome to Montgomery County, Maryland - Single Sign On" and a warning: "UNAUTHORIZED ACCESS IS PROHIBITED AND PUNISHABLE BY LAW!". Below this are fields for "User Name:" and "Password:", both highlighted with a red box. A "Log In" button is positioned below the password field, with a red arrow pointing to it. At the bottom, there are links for "Change My Password", "Forgot Password?", "My Account", and "Unlock My Account".

4. Select Tax Assessment System from the Apps section.



The screenshot displays the "MCG Apps" section of the portal. It features a navigation bar with tabs for "All Apps", "Featured", "Internet", "MCG Apps", and "Top-5 Apps". Below the navigation bar are three main sections: "My Favorites", "Most Visited", and "Activity Calendar". The "Most Visited" section lists several applications, each with a speech bubble icon containing a number and the application name. The "Tax Assessment System" is listed at the bottom of this list, with a red arrow pointing to it. The "Activity Calendar" on the right shows dates from Friday, 14th February to Friday, 21st February, with specific events like "7:00 pm: ERP Weekly Backup" and "All Day: MCTime Due".

Home Page

The State will launch all activities from the TAS Home Page. The home page houses a TAS system overview, the data contribution status indications for annual billing, agency contact information, and a batch job overview.

Home Page

[Real Property Tax Annual Billing Dashboard](#)

SDAT01 Annual File	STMD		SDAT02 Homeowner Credit	STMD	
State Parking Exemption Data	STMD		DEP Storm Water Data	DEPS	
DEP Refuse Charge Data	DEPR		WSSC Charge Data	WSSC	
Rockville Storm Water Data	ROCK		Rockville Special Charge Data	ROCK	
Gaithersburg Storm Water Data	GATH		DHCA Charge Data	DHCA	
Bay Restoration Charge Data	TRSY		Special Charges Data	TRSY	
Special Credits Data	TRSY		Mortgage Companies	TRSY	

Ready Not Ready

[Batch Job Overview](#)

[State Batch Job Log](#)

[Agency Contact Information](#)

Figure 1 – State of Maryland TAS Home Page

Batch Job Overview

The Batch Job Overview table provides an overview of the daily, monthly, bi-monthly, quarterly, and annual batch jobs that are scheduled to run. The information includes the batch code, name, category, agency, and run frequency. The email groups listed in the table will receive a notification upon success or failure of the batch job.

Batch Job Overview				
Total: 15				
Batch Code	Batch Name	Category	Agency	Run
01	SDAT01 - Real Property TAX Annual Billing	RPTAX	STMD	Ann
02	SDAT01 - Real Property TAX Monthly Revised Billing	RPTAX	STMD	Mon
03	SDAT01 - Real Property TAX Monthly Update	PPTAX	STMD	Mon
04	SDAT01 - Real Property TAX Monthly File Export	RPTAX	STMD	Mon
05	SDAT04 - New Construction	RPTAX	STMD	Qua
06	SDAT02 - Home Owner Credit	RPTAX	STMD	Bi-M
07	SDAT03 - Personal Property Tax	PPTAX	STMD	Bi-M
08	PU - Public Utility	PUTAX	TRSY	Dai
09	DEP Solid Waste Charges	RPTAX	DEPR	Dai
10	DEP Storm Water Charges	PPTAX	DEPS	Ann
11	WSSC Charges	RPTAX	WSSC	Qua
12	Real Property Tax Special Charges	RPTAX	TRSY	Ann
13	Lenders	RPTAX	TRSY	Ann
14	Real Property Tax Special Credit	RPTAX	TRSY	Ann
15	SDAT01 - Real Property TAX Rollover	RPTAX	STMD	Ann















Figure 2 – Batch Job Overview



Real Property Tax Annual Billing Dashboard

The Real Property Tax Annual Billing Dashboard serves to display a “Ready” or “Not Ready” status for each data contributor during the annual billing process. Once a contributor’s data is ready for processing, they will simply click on the red button next to their agency name. The button will turn green to indicate that the data is ready for processing.

Home Page

[Real Property Tax Annual Billing Dashboard](#)

SDAT01 Annual File	STMD		SDAT02 Homeowner Credit	STMD	
State Parking Exemption Data	STMD		DEP Storm Water Data	DEPS	
DEP Refuse Charge Data	DEPR		WSSC Charge Data	WSSC	
Rockville Storm Water Data	ROCK		Rockville Special Charge Data	ROCK	
Gaithersburg Storm Water Data	GATH		DHCA Charge Data	DHCA	
Bay Restoration Charge Data	TRSY		Special Charges Data	TRSY	
Special Credits Data	TRSY		Mortgage Companies	TRSY	















 Ready
  Not Ready



[Batch Job Overview](#)

Figure 3A - Data Contribution Change Indication – Before

Home Page

[Real Property Tax Annual Billing Dashboard](#)

SDAT01 Annual File	STMD		SDAT02 Homeowner Credit	STMD	
State Parking Exemption Data	STMD		DEP Storm Water Data	DEPS	
DEP Refuse Charge Data	DEPR		WSSC Charge Data	WSSC	
Rockville Storm Water Data	ROCK		Rockville Special Charge Data	ROCK	
Gaithersburg Storm Water Data	GATH		DHCA Charge Data	DHCA	
Bay Restoration Charge Data	TRSY		Special Charges Data	TRSY	
Special Credits Data	TRSY		Mortgage Companies	TRSY	

 Ready
  Not Ready

[Batch Job Overview](#)

Figure 3B - Data Contribution Change Indication – After

Agency Contact Information

The Agency Contact Information table provides each agency name and code in addition to the names, email addresses, and phone numbers of primary contacts from each group.

Batch Job Overview					
Agency Contact Information					
Total: 11					
Agency Code	Agency Name	First Name	Last Name	Phone	Email
DEPR	MC - DEP Refuse	Melissa	Nolin		
DEPS	MC - DEP Stormwater	Vicky	Wang		
DHCA	MC - DHCA				
GATH	Gaithersburg				
MCDT	MC - Department of Transportation				
MGIS	MC - GIS				
ROCK	Rockville City				
STMD	State of Maryland	Amy			
TKPK	Takoma Park				
TRSY	MC - Treasury	Phavane			
WSSC	WSSC				

Figure 4 – Agency Contact Information

View Property

The View Property screen is an inquiry screen available to all TAS users. From this screen, users can look up information for a given property to include: record information, mailing address, legal description, premise address, cycle data, prior assessment year, and more.

The screenshot shows a web application interface titled "View Property". At the top, there is a search section labeled "Search By" with a red header. Below this, there are three input fields: "Account#:" followed by a text box, "Levy Type:" followed by a dropdown menu showing "- Select -", and "Levy Year:" followed by another dropdown menu showing "- Select -". To the right of these fields are two buttons: "Search" and "Cancel". The main body of the page is a large, empty white space. At the bottom, there is a dark blue footer bar containing the following text: "Privacy Policy | User Rights | Accessibility | Disclaimer", "Copyright 2002-2014 Montgomery County Government All Rights Reserved", and "Best viewed with IE 7.0 and higher".

Figure 5 – View Property

To Search for an Account

1. From the View Property screen, enter a nine digit account number into the Account Number field.
2. Click Search. **To clear your search and start over, click "Cancel"*

View Property

Search By

Account#: Levy Type: Levy Year:

In this example, upon searching for Account #0000011, a table populates with the account records for each levy year (dating back to 1999).

View Property

Search By

Account#: Levy Type: Levy Year:

Total: 16

Account Number	Levy Type	Levy Year	Owner Name	Premise Address	Mail Address	Tax Class	District Ward	Geo Code	Owner Occ. Code	Record Type	Edit
0000011	A	2014	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
0000011	A	2013	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
0000011	A	2012	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
0000011	A	2011	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
0000011	A	2010	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
0000011	A	2009	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
0000011	A	2008	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
0000011	A	2007	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
0000011	A	2006	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
0000011	A	2005	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
0000011	A	2004	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
0000011	A	2003	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
0000011	A	2002	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
0000011	A	2001	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
0000011	A	2000	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
0000011	A	1999	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit

For each account, the table displays the account number, levy type, levy year, owner name, premise address, mail address, tax class, district ward, geo code, owner occupancy code, and record type.

Search By

Account#: Levy Type: Levy Year:

Total: 16

Account Number	Levy Type	Levy Year	Owner Name	Premise Address	Mail Address	Tax Class	District Ward	Geo Code	Owner Occ. Code	Record Type
0000011	A	2014	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M
0000011	A	2013	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M

Additional Notes:

The Account Number field is required as demarcated by the red asterisk (*).

Users may also opt to provide Levy Type and Levy Year by selecting from the drop down menus.

Doing so limits the search criteria to one levy type and one levy year as opposed to doing a more comprehensive search.

Account Number	Levy Type	Levy Year	Owner Name	Premise Address	Mail Address	Tax Class	District Ward	Geo Code	Owner Occ. Code	Record Type
00000011	A	2013	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG, 20879	P O BOX 449 BARNESVILLE, MD 20838	42	01	81	N	M

To View the Complete Record

1. From the search results in the previous example, click the hyperlink in the Account Number column.

Account Number	Levy Type	Levy Year	Owner Name	Premise Address	Mail Address
00000011	A	2014	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 44 BARNESVIL
00000022	A	2014	CASSIS JOHN D ET AL TR	18970 WOODFIELD GAITHERSBURG , 20879	701 HERITA GEORGETO
00000033	A	2014	O'DONNELL JOHN P	21411 WOODFIELD GAITHERSBURG , 20882	21411 WOC GAITHERSB

Upon clicking the hyperlink for account number “00000011”, a new screen appears displaying the full record.

[Search Property](#) >> View Property

Record Information							
Account Number:	00000011	Levy Year:	2014	Levy Type:	A	Tax Class:	42
Owner Name:	BROWN R EDWIN & WINSOME S	Owner Name2:		Name Key:	BROWN R EDWIN & WINSOME S	Owner Occupancy Code:	N
County Code:	16	District Ward:	01	Geographic Code:	81	Town Code:	000
Subdivision Code:	0009	Plat Number:		Section:		Block:	
Lot:		Map:	GU21	Grid:	0000	Parcel:	000
Zoning Code:	I4	Land Use Code:	I	MultiParentAcct Ind:		BPRUC:	500
County Property Code:	637	County Service Code:		Utility Sewer:	Public	Utility Water:	N/A
Mailing Address							
Street Address:	P O BOX 449	Street Address2:		Mailing City:	BARNESVILLE	Mailing State:	MD
Mailing Zip:	20838-						
Legal Description:							
Legal Desc1:	PAR O MONTGOMERY AIR	Legal Desc2:	PARK INDUSTRIAL PARK	Legal Desc3:		Legal Desc3:	
Premise Address							
Number:	07801	Number Suffix:		Direction:		Name:	AIR
Type:	RD	City:	GAITHERSBURG	Zip:	20879-2333	Condo Unit:	
Deed Reference							
Deed Reference:		Libe:	21204	File:	0200		

To Edit a Record:

1. From the View Property screen, enter the eight digit account number into the search field.
Select the Levy Type and Levy Year.
Click Search.

Home View Property State

View Property

Search By

Account#*: Levy Type: Levy Year:

- The account will appear in the table below the search field.
Click the hyperlink in the “Edit” column.


erty

By

00000011 Levy Type: A Levy Year: 2013 Search Cancel

Levy Type	Levy Year	Owner Name	Premise Address	Mail Address	Tax Class	District Ward	Geo Code	Owner Occ. Code	Record Type	Edit
A	2013	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG, 20879	P O BOX 449 BARNESVILLE, MD 20838	42	01	81	N		Edit

- A new “Edit Property” screen appears displaying the full record with several fields unlocked for editing. Make any necessary edits to the desired field(s).

 MCG TAS ASSESSMENT SYSTEM -Test Well TESTPC/ Friday, Fe 21

Home View Property State Logout

[Search Property](#) >> Edit Property

Record Information	
Account Number:	00000011
Levy Year:	2013
Levy Type:	A
County Code:	16
Owner Name*:	BROWN R EDWIN & WIN
Owner Name2:	
Name Key:	BROWN R EDWIN & WIN
Owner Occupancy Code:	N
Tax Class:	42
Town Code:	000
Subdivision Code:	0009
Plat Number:	
Parcel:	0000
Land Use Code:	I
MultiParentAcct Ind:	
BPRUC:	50000
Exemption Code:	0
Exempt Status:	
Exempt Class:	
County Service Code:	
Account Status:	M

Mailing Address	
Street Address:	P O BOX 449
Street Address2:	
Mailing City:	BARNESVILLE
Mailing State:	MD
Mailing Zip:	20838

Legal Description:	
Legal Desc1:	PAR O MONTGOMERY A
Legal Desc2:	PARK INDUSTRIAL PAR
Legal Desc3:	

Premise Address	
Number:	07801
Number Suffix:	
Direction:	
Name:	AIRPARK
Type:	RD
City:	GAITHERSBURG
Zip:	20879
Condo Unit:	

Deed Reference

4. Scroll to the bottom of the screen.
Check the box next to “Generate Revise Bill” to flag the record for revised billing.
Click Submit. **In the case that you do not wish to make an edit, click “Cancel”*

Phase-In Value:	00000000	Assessment:			
Homestead					
Previous State Assessment Credit:	00000000	Curr State Assmt Credit:	00000000	Previous County Assessment Credit:	00000000
Previous Municipal Assessment Credit:	00000000	Curr Muni. Assmt Credit:	00000000	Previous Credit Status Code:	
Special Dates(MMDDCCYY) and Data					
County Club Assessment Date:		County Club Expiration Date:		County Club Extension Date:	
Enterprise Zone Date:		Enterprise Zone Assessment:		Agricultural tax Liability Due date:	
Value Change Date:		Credit Change Date:		Agricultural Land Preservation FDN Area:	
<input checked="" type="checkbox"/> Generate Revise Bill <input type="button" value="Submit"/> <input type="button" value="Cancel"/>					
<small>Privacy Policy User Rights Accessibility Disclaimer Copyright 2002-2014 Montgomery County Government All Rights Reserved Best viewed with IE 7.0 and higher</small>					

In this example, the street address listed on the record for Account #00000011, Type A, Levy Year 2013 was changed. Upon clicking “Submit”, a confirmation appears indicating a successful update.

Mailing Address	
Street Address:	CHANGE ADDRESS 123
Mailing Zip:	20838

Home View Property State					
Search Property >> Edit Property					
Updated successfully					
Record Information					
Account Number:	00000011	Levy Year:	2013	Levy Type:	A
Owner Name*:	BROWN R EDWIN & WIN	Owner Name2:		Name Key:	BROWN R EDWIN & WIN
Tax Class:	42	Town Code:	000	Subdivision Code:	0009
Parcel:	0000	Land Use Code:	I	MultiParentAcct Ind:	

Select State of Maryland functions

From the TAS Home Page, State of Maryland users have the option to select four different functions located under the “State” tab:

1. Manage Parking Exemptions
2. Manage Subdivision Codes
3. View Recaptured Home Owner Credits
4. View Reports

The screenshot shows the MCG Tax Assessment System - TEST interface. At the top, there is a navigation bar with 'Home', 'View Property', and 'State' (highlighted). Below this, a dropdown menu is open under 'State', listing four options: 'Manage Parking Exemptions', 'Manage Subdivision Codes', 'Recaptured Home Owner Credits', and 'View Reports'. A red arrow points to the 'Manage Parking Exemptions' option. Below the dropdown, there is a table of data items with their respective status indicators (red or green boxes). The table is as follows:

SDAT01 Annual File	STMD	[Red]	SDAT02 Homeowner Credit	STMD	[Red]
State Parking Exemption Data	STMD	[Red]	DEP Storm Water Data	DEPS	[Green]
DEP Refuse Charge Data	DEPR	[Red]	WSSC Charge Data	WSSC	[Red]
Rockville Storm Water Data	ROCK	[Red]	Rockville Special Charge Data	ROCK	[Red]
Gaithersburg Storm Water Data	GATH	[Red]	DHCA Charge Data	DHCA	[Red]
Bay Restoration Charge Data	TRSY	[Red]	Special Charges Data	TRSY	[Red]
Special Credits Data	TRSY	[Red]	Mortgage Companies	TRSY	[Red]

Below the table, there is a status indicator: 'Ready' (green) and 'Not Ready' (red). At the bottom, there are links for 'Batch Job Overview', 'State Batch Job Log', and 'Agency Contact Information'.

Figure 6 – State of Maryland Sub Tabs

Manage Parking Exemptions

Upon selecting “Manage Parking Exemption” from the State menu, users are directed to a page with three tabs:

1. View Parking Summary
2. Manage Parking Exemptions
3. View Pending Revised Bills

State >> [View PK Exemption Summary](#)

[View PK Summary](#) [Manage PK Exemptions](#) [View Pending Revised Bills](#)

Total: 3

Levy Year	Levy Type	Total Accts	Total Full Exempt	Total Partial Exempt	Total Partial Assmt
2014	A	606	550	56	82,700,424.00
2013	A	606	550	56	82,700,424.00
2012	A	608	552	56	82,700,424.00
	Grand Total	1820	1652	168	248,101,272.00

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Figure 7 – Manage Parking Exemption Screen

View PK Summary

The first tab on the “Manage Parking Exemptions” screen is “View Parking Summary”. This tab displays a table which provides total accounts, total full and partial exemptions, and total partial assessments for a given levy year.

Users can navigate to assessment data for the current or previous levy years by clicking on the links in the “Levy Year” column.

Levy Year	Levy Type	Total Accts	Total Full Exempt	Total Partial Exempt	Total Partial Assmt
2014	A	606	550	56	
2013	A	606	550	56	
2012	A	608	552	56	
	Grand Total	1820	1652	168	

Figure 8 – View PK Summary

Manage PK Exemptions

The “Manage Parking Exemptions” tab allows users to search for accounts by account number, add accounts, view account information, and edit assessments.

State >> [View PK Exemption Summary](#) >> Manage PK Exemption

View PK Summary | Manage PK Exemptions | View Pending Revised Bills

Search By

Account Number: (Ex. 00000011)

Total: 606

Account Number	Levy Year	Tax Class	Exempt Code	PKLot Code	PKLot Assmt	Created By	Date Created	Updated By	Date Updated	To Revise?	Edit
00416405	2014	76	4	PK3400	0	Batch Job	11/12/2013 2:07:39 PM		11/12/2013 2:07:39 PM		Edit
00417400	2014	76	5	PK3500	2037400	Batch Job	11/12/2013 2:07:39 PM		11/12/2013 2:07:39 PM		Edit
00419966	2014	79	4	PK3400	0	Batch Job	11/12/2013 2:07:39 PM		11/12/2013 2:07:39 PM		Edit
00419977	2014	79	4	PK3400	0	Batch Job	11/12/2013 2:07:39 PM		11/12/2013 2:07:39 PM		Edit
00429715	2014	79	4	PK3400	0	Batch Job	11/12/2013 2:07:39 PM		11/12/2013 2:07:39 PM		Edit

Figure 9 – Manage PK Exemptions

To search by account number:

1. Click in the account number field at the top of the screen.
2. Enter in the eight-digit account number.
3. Click “search”.

View PK Summary | Manage PK Exemptions | View Pending Revised Bills

Search By

Account Number: (Ex. 00000011)

Total: 606

Account Number	Levy Year	Tax Class	Exempt Code	PKLot Code	PKLot Assmt
00416405	2014	76	4	PK3400	0
00417400	2014	76	5	PK3500	2037400

If the account exists, it will populate on the screen along with the corresponding account details.

State >> [View PK Exemption Summary](#) >> Manage PK Exemption

View PK Summary | Manage PK Exemptions | View Pending Revised Bills

Search By

Account Number: (Ex. 00000011)

Total: 1

Account Number	Levy Year	Tax Class	Exempt Code	PKLot Code	PKLot Assmt	Created By	Date Created	Updated By	Date Updated	To Revise?	Edit
00446014	2014	76	4	PK3400	0	Batch Job	11/12/2013 2:07:39 PM		11/12/2013 2:07:39 PM		Edit
<input type="text"/>	2014	<input type="text"/>	-Select-	<input type="text"/>	<input type="text"/>					<input type="checkbox"/>	Insert

If the account does not exist, a “No Record” error message will appear.

To Add an Account:

1. Navigate to the bottom of the “Manage PK Exemptions” table to find an empty field in the Account Number column.

View PK Summary Manage PK Exemptions View Pending Revised Bills							
Search By							
Account Number:		<input type="text"/>	Search		Cancel (Ex. 00000011)		
Total: 606							
Account Number	Levy Year	Tax Class	Exempt Code	PKLot Code	PKLot Assmt	Created By	Date Created
00416405	2014	76	4	PK3400	0	Batch Job	11/12/2013 2:07:3
00417400	2014	76	5	PK3500	2037400	Batch Job	11/12/2013 2:07:3
00419966	2014	79	4	PK3400	0	Batch Job	11/12/2013 2:07:3
00419977	2014	79	4	PK3400	0	Batch Job	11/12/2013 2:07:3
00429715	2014	79	4	PK3400	0	Batch Job	11/12/2013 2:07:3
00430521	2014	76	4	PK3400	0	Batch Job	11/12/2013 2:07:3
00431445	2014	79	4	PK3400	0	Batch Job	11/12/2013 2:07:3
00432484	2014	76	4	PK3400	0	Batch Job	11/12/2013 2:07:3
00439986	2014	80	4	PK3400	0	Batch Job	11/12/2013 2:07:3
00439997	2014	80	4	PK3400	0	Batch Job	11/12/2013 2:07:3
00440690	2014	80	4	PK3400	0	Batch Job	11/12/2013 2:07:3
00440690	2014	80	4	PK3400	0	Batch Job	11/12/2013 2:07:3
00440690	2014	80	4	PK3400	0	Batch Job	11/12/2013 2:07:3
00440690	2014	76	4	PK3400	0	Batch Job	11/12/2013 2:07:3
00446014	2014	76	4	PK3400	0	Batch Job	11/12/2013 2:07:3
<input type="text"/>	<input type="text" value="2014"/>	<input type="text"/>	-Select-	<input type="text"/>	<input type="text"/>		

2. Click in the empty Account Number field and add the eight-digit account number.
3. Click on the empty Parking Lot Assessment field and enter the assessment total.
4. Select an exemption code.

00446014	2014	76	4	PK3400	0	Batch Job
<input type="text" value="00112233"/>	<input type="text" value="2014"/>	<input type="text" value="53"/>	<input type="text" value="4"/>	<input type="text"/>	<input type="text"/>	

5. Click “Insert” in the Edit column to the right of the assessment total.

<input type="text" value="0"/>						<input type="button" value="Insert"/>
--------------------------------	--	--	--	--	--	---------------------------------------

The page will update with the new account at the top of the table.

View PK Summary Manage PK Exemptions View Pending Revised Bills							
Search By							
Account Number:		<input type="text"/>	Search		Cancel (Ex. 00000011)		
Total: 607							
Account Number	Levy Year	Tax Class	Exempt Code	PKLot Code	PKLot Assmt	Created By	Date Created
00112233	2014	53	5		0		

View Pending Revised Bills

The final tab on the “Manage Parking Exemptions” screen is “View Pending Revised Bills”. When a parking lot assessment is modified, the pending revision is displayed here until it is processed.

Account Number	Levy Year	Levy Type	Exempt Code	PKLot Code	PKLot Assmt	Created By	Date Created	Updated By	Date Updated
00442530	2014	A	4	PK3400	\$5.00 Batch Job	Lily	11/12/2013 2:07:39 PM	Lily	12/31/2013 1:40:53 PM
		Grand Total	1	1	\$5.00				

Figure 10 – View Pending Revised Bills

To Modify an Assessment and View Pending Revised Bills:

1. Identify the account that needs to be modified and click “Edit” in the far right column.

Search By											
Account Number:		<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="Cancel"/>	(Ex. 00000011)						
Total: 607											
1 2 3 4 5 6 7 8 9 10 ... >>											
Account Number	Levy Year	Tax Class	Exempt Code	PKLot Code	PKLot Assmt	Created By	Date Created	Updated By	Date Updated	To Revise?	Edit
00442530	2014	76	4	PK3400	5	Batch Job	11/12/2013 2:07:39 PM	Lily	12/31/2013 11:56:40 AM		Edit

PKLot Assmt	Created By	Date Created	Updated By	Date Updated	To Revise?	Edit
5	Batch Job	11/12/2013 2:07:39 PM	Lily	12/31/2013 11:56:40 AM	<input type="checkbox"/>	Edit

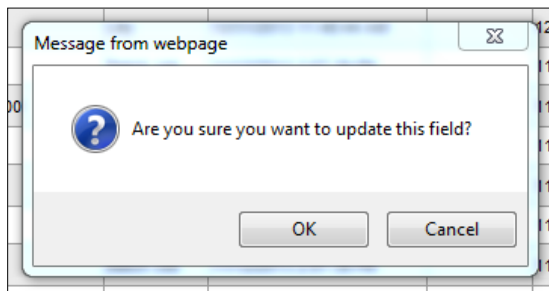
2. The the parking lot assessment field will unlock and provide an option to flag for revision in the column labeled “Revised?”.

Enter the correct amount into the assessment field and check the box to revise. Click “Update”.

Account Number	Levy Year	Tax Class	Exempt Code	PKLot Code	PKLot Assmt
00442530	2014	76	4	PK3400	5

Created By	Date Created	Updated By	Date Updated	To Revise?	Edit
Batch Job	11/12/2013 2:07:39 PM	Lily	12/31/2013 11:56:40 AM	<input checked="" type="checkbox"/>	Update Cancel

3. Click “OK” when the prompt “Are you sure you want to update this field?” appears.



The total pending revised bill(s) will populate and appear on the “Pending Revised Bills” tab until the revisions are processed.

View PK Summary Manage PK Exemptions View Pending Revised Bills							
Total Pending Revised Bill(s): 1							
Account Number	Levy Year	Levy Type	Exempt Code	PKLot Code	PKLot Assmt	Amount	Created
00442530	2014	A	4	PK3400	5	\$5.00	Batch
Grand Total			1	1	1	\$5.00	

Manage Subdivision Codes

In the event that a subdivision code would need to be added or modified, users can do so via the “Manage Subdivision Code” screen.

This page displays and describes each subdivision code along with the corresponding county code and district ward.

MCG TAX ASSESSMENT SYSTEM

Home View Property State

State >> [Manage Subdivision Codes](#)

Total: 1755

County Code	District Ward	Subdivision Code	Description	Edit
16	01	0000	test	Edit
16	01	0001	LAYTONSVILLE OUTSIDE	Edit
16	01	0002	LAYTONSVILLE TOWN	Edit
16	01	0003	GOSHEN ESTATES	Edit
16	01	0004	GRIFFITH PARK	Edit
16	01	0005	WARD FARM ESTATES	Edit
16	01	0006	SENECA OVERLOOK	Edit
16	01	0007	GOSHEN HUNT HILLS	Edit
16	01	0008	DANAC AIR PARK	Edit
16	01	0009	MONTG CO AIR PARK	Edit
16	01	0010	MCRORY - MONTG VILL	Edit
16	01	0011	MUNCASTER MANOR	Edit
16	01	0012	PLEASANT RIDGE-MONTG VILL	Edit
16	01	0013	HIGHLAND HALL -MONTG VILL	Edit
16	01	0014	ESSEX PLACE - MONTG VILL	Edit
<input type="text" value="16"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Insert

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Figure 11 – Manage Subdivision Codes


To Edit an Existing Subdivision Code:

1. Identify the code you wish to modify. Click “Edit” in the edit column in that row.

State >> [Manage Subdivision Codes](#)

Total: 1755

County Code	District Ward	Subdivision Code	Description
16	01	0000	test
16	01	0001	LAYTONS


Subdivision Code	Description	Edit
00	test	 Edit
01	LAYTONSVILLE OUTSIDE	Edit

The District Ward, Subdivision Code, and Description fields will unlock for editing.

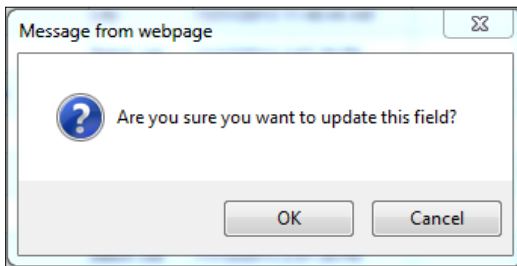
[Manage Subdivision Codes](#)

County Code	District Ward	Subdivision Code	Description	Edit
	01	0000	test	Update Cancel

2. Edit the desired field(s) and click “update”.

Subdivision Code	Description	Edit
0015	TEST2	 Update

3. Click “OK” when the prompt “Are you sure you want to update this field?” appears.



The changes process and are reflected in the table. Since subdivision codes are listed in consecutive order, when subdivision codes number is modified, it will be listed in sequence accordingly. For example, by changing the code above from 0000 to 0015, the listing moves further down in the table.

16	01	0014	ESSEX PLACE - MONTG VILL
16	01	0015	TEST2

Recaptured Home Owner Credits

Upon selecting “Recaptured Home Owner Credits” from the State menu, users are directed to an inquiry-only screen. The table on this page serves to provide the State with updates when Treasury removes the County Home Owner Credits from a given account. This screen displays the up-to-date information to include the account number, credit year, County and/or Municipal credit, and the date removed.

The screenshot displays the MCG TAS ASSESSMENT SYSTEM - Test interface. The header includes the Montgomery County logo, the system name, and a welcome message for user TESTPCAP5 on Friday, February 21, 2014. Navigation links for Home, View Property, State, and Logout are present. The main content area shows a link to 'View Recaptured Home Owner Credits by County' and a table with the following data:

HOCR ACCT	CREDIT YEAR	State Credit	County Credit	Municipal Credit	Removed?	Date Removed
00001232	2013	735.00	1369.02	0.00	<input checked="" type="checkbox"/>	2/19/2014 5:25:41 PM
00000990	2013	131.37	1502.56	0.00	<input checked="" type="checkbox"/>	2/19/2014 5:25:35 PM

The footer contains links for Privacy Policy, User Rights, Accessibility, and Disclaimer, along with copyright information for Montgomery County Government and a note about browser compatibility.

Figure 12 – Recaptured Home Owner Credits

View Reports

Upon selecting “View Reports” from the State menu, users have the option to select one of the following reports:

1. View GUI Pending Revised Bills
2. View Transaction Change Log
3. View Batch Job Error Log

Report Name	Code	Status	Report Name	Code	Status
SDAT01 Annual File	STMD	Red	SDAT01 Annual File	SDAT	Red
State Parking Exemption Data	STMD	Red	DEP Storm Water Data	DEPR	Green
DEP Refuse Charge Data	DEPR	Red	WSSC Charge Data	WSSC	Red
Rockville Storm Water Data	ROCK	Red	Rockville Special Charge Data	ROCK	Red
Gaithersburg Storm Water Data	GATH	Red	DHCA Charge Data	DHCA	Red
Bay Restoration Charge Data	TRSY	Red	Special Charges Data	TRSY	Red
Special Credits Data	TRSY	Red	Mortgage Companies	TRSY	Red

Ready Not Ready

[Batch Job Overview](#)
[State Batch Job Log](#)
[Agency Contact Information](#)

Figure 13 – View Reports

View GUI Pending Revised Bills

Upon selecting “View GUI Pending Revised Bills” from the State menu, users are directed to a search and inquiry only screen. This screen allows users to search for and view pending revised bills for a given account number, levy type, and/or levy year. Based on the search criteria, the applicable pending revised bills accumulated from each of the State’s GUI screens will appear in this table.

The screenshot shows a web application interface titled "View GUI Pending Revised Bills". Below the title is a search section labeled "Search By". It contains three input fields: "Account #:" with an empty text box, "Levy Type:" with a dropdown menu showing "- Select -", and "Levy Year:" with a dropdown menu showing "- Select -". To the right of these fields are two buttons: "Search" and "Cancel". Below the search section, the text "No Record." is displayed, indicating that no bills were found for the current search criteria.

Figure 14 – View GUI Pending Revised Bills

View Transaction Change Log

Upon selecting “View Transaction Change Log” from the State menu, users are directed to a page with three tabs:

1. View State Log
2. View Special Charge Log
3. View Special Credit Log

View State Change Log

Search By

Account #: Levy Type: Levy Year:

Log Date From*: Log Date To*:

Figure 15 – View Transaction Change Log

View State Log

The first tab on the View State Change Log is “View State Log”. The search function within this tab allows State users to view the existing change log on a specific account or per levy type, and levy year. As demarcated by the red asterisk (*), the “Log Date From” and “Log Date To” fields must be completed prior to the search.

In this example, the search criteria was set to pull the change log for changes occurring between April 1, 2014 and May 30, 2014

A total of 4,321 changes were made, and the table provides the full description to include record information as well as the batch number, date logged, and the user that logged the information.

Account#	District	Levy Type	Levy Year	Owner Name	Tax Class	Transfer Date	Transfer Amt	Conveyed Ind	Liber	Folio	Geo Code	OCC	Record Type	Batch#	Logged By	Date
00003377	01	A	2014	GRIFFITH WILEY G & C A	42	00000000	000000000	0	00000	0000	82	D	M	27	ESB	4/25/2014
00003388	01	A	2014	VAUGHAN EDMOND R	42	06282012	000000000	4	02813	0158	82	N	M	27	ESB	4/25/2014
00005148	01	A	2014	BRORING THOMAS E &	42	05051998	000172500	1	12999	0105	82	N	M	27	ESB	4/25/2014
00010180	01	A	2014	LE VACA KEVIN & MANUELA ET AL	42	12182006	001018275	1	14667	0348	82	H	M	27	ESB	4/25/2014
00012042	01	A	2014	FISHER KENNETH R	58	03302011	000235000	1	19909	0001	82	H	M	27	ESB	4/25/2014
00012190	01	A	2014	SCHULTZ LORRAINE H TR	42	05032000	000000000	3	00000	0000	82	N	M	27	ESB	4/25/2014
00013558	01	A	2014	SCHWARTZ MARK G ET AL	42	01071992	000330000	1	00000	0000	82	H	M	27	ESB	4/25/2014
00013720	01	A	2014	SCHULTZ LORRAINE H TR	42	05032000	000000000	4	03453	0130	82	N	M	27	ESB	4/25/2014

To narrow the search, it is recommended that at least one of the non-required fields is completed.

View Batch Job Error Log

Upon selecting “View Batch Job Error Log” from the View Reports menu, users are directed to a page with three tabs:

1. View Error Summary
2. View Error List by Batch
3. View Errors by Batch

Each tab displays a table which provides information about errors related to the scheduled batch jobs. These inquiry screens serve only to provide information and do not have additional functionality built in.

Home View Property State						
State >> View Batch Error Log						
<input type="button" value="View Error Summary"/> <input type="button" value="View Error List By Batch"/> <input type="button" value="View Errors By Batch"/>						
Total: 31						
Batch ID	Batch Name	Agency Code	Start Date	End Date	Total Errors	
156	SDAT01 - Real Property TAX Monthly Update	STMD	12/20/2013 4:28:29 PM	12/20/2013 10:13:35 PM	574	
145	SDAT01 - Real Property TAX Monthly Update	STMD	11/29/2013 11:44:53 AM	11/30/2013 8:25:31 PM	568	
137	SDAT01 - Real Property TAX Monthly Update	STMD	11/14/2013 10:41:02 AM	11/14/2013 12:44:30 PM	568	
136	SDAT01 - Real Property TAX Monthly Update	STMD	11/12/2013 10:15:21 PM	11/13/2013 3:25:09 PM	562	
132	SDAT01 - Real Property TAX Monthly Update	STMD	11/7/2013 1:01:44 PM	11/7/2013 1:24:51 PM	181	
127	SDAT01 - Real Property TAX Monthly Update	STMD	10/9/2013 5:06:00 PM	10/9/2013 5:18:18 PM	181	
126	SDAT03 - Personal Property Tax	STMD	10/8/2013 9:49:03 AM	10/8/2013 9:49:06 AM	7	
121	SDAT03 - Personal Property Tax	STMD	10/3/2013 1:30:34 PM	10/3/2013 1:30:41 PM	415	
114	SDAT03 - Personal Property Tax	STMD	9/19/2013 10:37:47 AM	9/19/2013 10:37:51 AM	6	
113	SDAT03 - Personal Property Tax	STMD	9/17/2013 12:23:34 PM	9/17/2013 12:23:44 PM	597	
111	SDAT01 - Real Property TAX Monthly Update	STMD	9/16/2013 10:05:54 PM	9/16/2013 10:18:17 PM	318	
110	SDAT03 - Personal Property Tax	STMD	9/16/2013 4:31:22 PM	9/16/2013 4:31:32 PM	601	
108	SDAT03 - Personal Property Tax	STMD	9/13/2013 11:50:55 AM	9/13/2013 11:51:11 AM	2	
107	SDAT01 - Real Property TAX Monthly Update	STMD	9/13/2013 11:29:24 AM	9/13/2013 12:55:35 PM	318	
106	SDAT03 - Personal Property Tax	STMD	9/13/2013 9:17:58 AM	9/13/2013 9:18:04 AM	4	
					Grand Total	4902
1 2 3						

Figure 16 – View Batch Job Error Log

[View Special Charge Log](#)

Information to be provided

Figure 17

[View Special Credit Log](#)

Information to be provided

Figure 18

View Error Summary

This table provides the batch ID, batch name, agency code, start & end date, and total amount of errors. By clicking on a hyperlink in the “Batch ID” column, users are directed to the “View Error List by Batch”

Batch ID	Batch Name	Agency Code	Start Date
156	SDAT01 - Real Property TAX Monthly Update	STMD	12/20/2013
145	SDAT01 - Real Property TAX Monthly Update	STMD	11/29/2013
137	SDAT01 - Real Property TAX Monthly Update	STMD	11/14/2013
126	SDAT01 - Real Property TAX Monthly Update	STMD	11/12/2013

Figure 19 – View Error Summary

View Error List by Batch

The “View Error List by Batch” tab displays all of the error lists pertaining to a given batch. Information in the table includes the batch ID and name, agency code, levy year, error code and description, error type, file name, creation date and total errors.

Batch ID	Batch Name	Agency Code	Levy Type	Levy Year	Error Code	Error Desc	Error Type	Batch File	Date Created	Created By	Total Errors
156	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1003	TAX Class Code Wrong	Critical	esb.12182013.txt	12/20/2013 4:39:36 PM		6
156	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1006	Subdivision Code Wrong	Non-Critical	esb.12182013.txt	12/20/2013 4:39:42 PM		184
156	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1008	CAMA Land Square Wrong	Non-Critical	esb.12182013.txt	12/20/2013 4:40:27 PM		87
156	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1009	Exempt Class Wrong	Non-Critical	esb.12182013.txt	12/20/2013 4:40:29 PM		120
156	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1013	Has Municipale Exempt Class But Not Exempt Amount	Non-Critical	esb.12182013.txt	12/20/2013 4:40:32 PM		177
Grand Total											574

In this example, Batch 156 has five associated batch error lists in TAS. By clicking on a hyperlink in the “Error Code” column, users are directed to the “View Error List by Batch”

Batch ID	Batch Name	Agency Code	Levy Type	Levy Year	Error Code	Error Desc
156	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1003	TAX Class Code Wrong
156	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1006	Subdivision Code Wrong
156	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1008	CAMA Land Square Wrong
156	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1009	Exempt Class Wrong
156	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1013	Has Municipale Exempt Class But Not Exempt Amount

View Errors by Batch

The “View Error by Batch” tab itemizes the errors pertaining to a specific error code. Information in the table includes the batch ID and name, account number, agency code, levy year, error code and description, error type, file name, and the date created.

View Error Summary View Error List By Batch View Errors By Batch										
Total: 6										
Batch ID	Account Number	Batch Name	Agency Code	Levy Type	Levy Year	Error Code	Error Desc	Error Type	Batch File	Date Created
156	03680425	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1003	TAX Class Code Wrong	Critical	esb.12182013.txt	12/20/2013 4:39
156	03680447	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1003	TAX Class Code Wrong	Critical	esb.12182013.txt	12/20/2013 4:39
156	03681555	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1003	TAX Class Code Wrong	Critical	esb.12182013.txt	12/20/2013 4:39

Figure 20 - View Errors by Batch

In this example, error code 1003 of batch 156 has six associated errors. The same error (Tax Class Code Wrong) has occurred on six different accounts.

Batch ID	Account Number	Batch Name	Agency Code	Levy Type	Levy Year	Error Code	Er
156	03680425	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1003	TA
156	03680447	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1003	TA
156	03681555	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1003	TA
156	03713151	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1003	TA
156	03719545	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1003	TA
156	03722235	SDAT01 - Real Property TAX Monthly Update	STMD	A	2014	1003	TA

Glossary of Terms

Acronym	Description
Consolidated Tax Bill	The real or personal property tax bill that includes all taxes and charges from County and all STPs as applicable
DHCA	Department of Housing and Community affairs
DEP	Department of Environmental Protection
DTS	Division of Technology Services
ePilot	
ESB	Enterprise Service Bus
FIN	Finance – Department of Finance
Freeze Period	The system prevents any SDAT files received during the freeze period from posting to the Assessment master file. The freeze period occurs in the month of June.
IMS Assessment System	The legacy Tax Assessment System that is being replaced.
Initial Bill	The first real or personal property tax bill for an account generated at the beginning of a levy year and for the full year
Levy Year	The twelve month period the property tax is levied mandated by Maryland law and County code; the levy year is from July 1 st to June 30 th
MUNIS	The current COTS real and personal property tax billing and collection application used by the County
New Levy Year	
Original Bill	The initial annual bill. This can also be a ¾, ½, or ¼ bill. These three bills are considered supplemental to the original annual bill.
Pre-Billing	The annual billing cycle begins with the pre-billing process for a new levy year. The pre-billing process begins in early January and concludes in early June.
Pre-Billing Quality Assurance	TAS performs a quality assurance comparison of all SDAT full files received to the Assessment master file and will identify and report any exceptions between the two files. Full SDAT files are received in January, June, and July.
Prior Levy Year	TAS will support multiple prior tax years. Prior levy data will result in Subsequent Initial, Revised, or Supplemental bills being generated.
Revised Bill	A revised bill is an adjustment to an Initial bill. Revised bills are for Initial bills only (annual, ¾, ½, or ¼ bill type). These bills are for initial bills only and are generated on a monthly basis.
Rollover	TAS will initialize all files and tables in preparation for the new levy year. This process is referred to as the “rollover”.
RTP	Receiving Trading Partner - municipalities, MGC departments, the State of Maryland, and downstream systems, such as ePilot and MUNIS that receive files or reports from the Assessment system.

Acronym	Description
SDAT	The State of Maryland’s “State Department of Assessment and Taxation”. The county receives SDAT files up to three times a week.
SDAT Freeze Period	See Freeze Period above
SOA	Service Oriented Architecture
SSO	Single Sign-On
STP	Sending Trading Partner – municipalities, MGC departments, and the State of Maryland who provide the County with tax assessment data for input to the Assessment system.
Subsequent Bills	Bills that were not included in the Initial Billing process
Supplemental Bills	Bills that are for assessments above and beyond the initial bill. These are typically related to new construction. There can be up to 3 quarter year bills produced for a property.
TAS	The replacement Tax Assessment System.
WSSC	Washington Suburban Sanitary Commission – a tax partner