Montgomery County Government

Department of Finance

Tax Assessment System (TAS)

Operations Guide

Appendix E – DHCA

Version 1

05/15/2014

Table of Contents

Document Structure

The Department of Housing & Community Affairs (DHCA) appendix is an extension of the TAS Operations Guide. The appendix describes TAS-related business rules, system functions, and roles and responsibilities for DHCA. For a high level overview of content provided in this document, please refer to the TAS Operations Guide.

Roles & Responsibilities

DHCA offers programs and services that prevent and correct problems that contribute to the physical decline of residential and commercial areas. DHCA also enforce the local housing code to ensure existing housing is maintained in a safe and sanitary condition. In the case of a neglected property, DHCA will perform a variety of services (such as lawn mowing & trash disposal) for which they bill the property owner. In the event the owner fails to pay the bill, the DHCA charge is levied on the current annual tax bill and subject to collection through the annual tax lien sale.

As a key contributor in the tax billing processes, DHCA is responsible to provide the Montgomery County Department of Finance (Division of Treasury & Division of FIN-IT) with property charges related to the aforementioned services.

Additional Notes: Exceptions to this service are City of Rockville, City of Gaithersburg, and commercial or owner-occupied properties in Takoma Park.

General Data Flow

The process by which DHCA contributes data and provides updates is facilitated by the TAS Graphical User Interface (GUI). The TAS GUI allows DHCA users to log, review, validate, process, and update charges throughout the levy year. Any DHCA transactions that occur since the last billing will be processed on the monthly revised bills.

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 process, 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 property tax bills that occur during the Levy year. The Department of Finance receives these as contributors make updates using the GUIs or batch file uploads. DHCA updates data throughout the levy year to be included in revised bills. The last update of each levy year is completed by the agreed upon date established with the Division of Treasury.

Monthly Activities

DHCA generates transactions at the beginning of each levy year along with revisions (i.e. changes or new charges) on a monthly basis. These revisions are processed into monthly revised bills.

Additional Notes:

- *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.*

Sample Case

If DHCA has three $100 charges in a given levy year as they are processed in new TAS during the year the transaction activity is as follows

a. Transaction #1 - Add the first $100 charge to the account
b. Transaction #2 – Modify Transaction #1 to change amount from $100 to $200.
c. Transaction #3 – Modify Transaction #2 to change amount from $200 to $300.

There is no linkage between how DHCA accounts for their payments internally so the amount would increase during the year to account for the new charges as they occur.

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.).

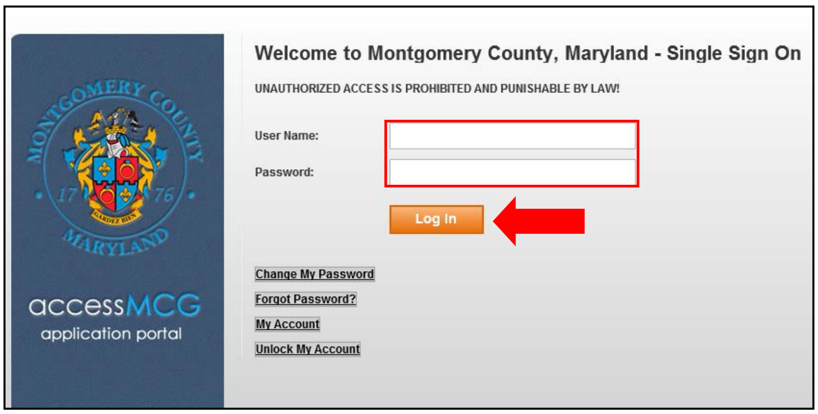
[1] *This rule does not apply to DEP SWS, DEP Storm Water, DHCA, & WSSC. These contributors will be responsible to handle the issue independently.*

Navigating the DHCA GUI Screens

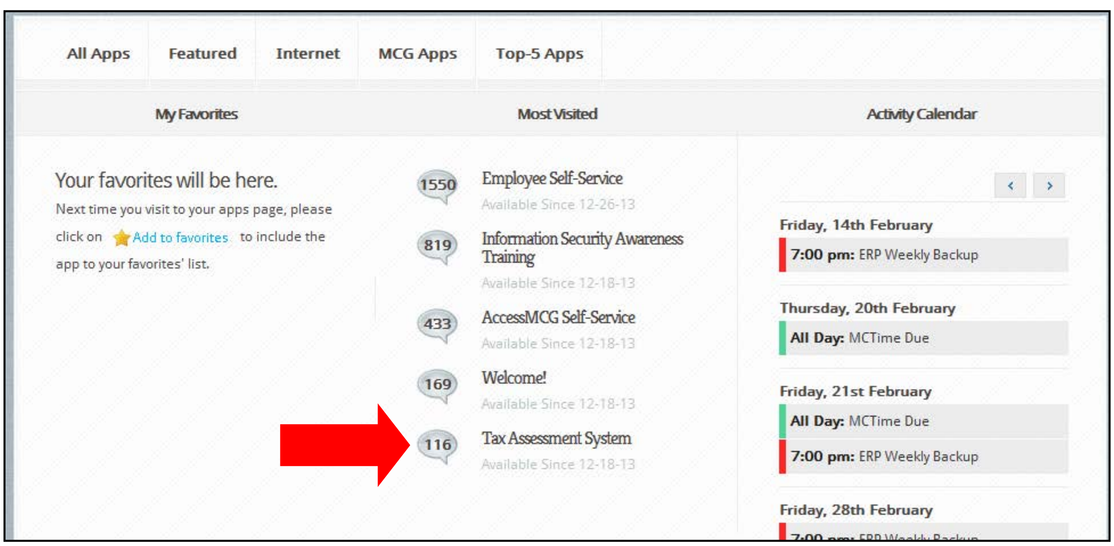
The DHCA interface is focused on viewing property and managing charges.

The GUI allows users to view previous charges per levy year, manage charges for current and previous levy years, and view pending revised bills. DHCA users will also have the ability to view property assessments. Logging In

1. Access the MCG ePortal at:
2. Enter your user name and password.
3. Click Log In.



4. Select Tax Assessment System from the Apps section.



Home Page

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

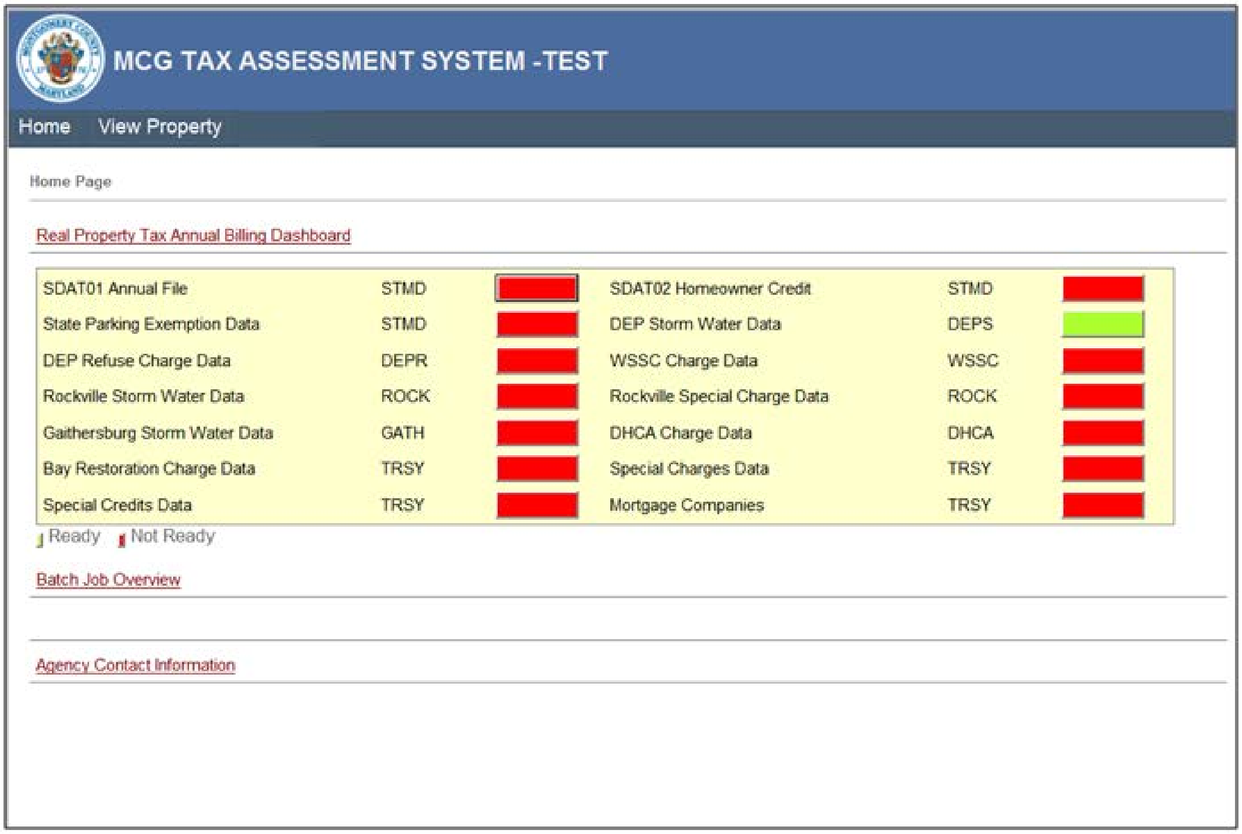


Figure 1 - DHCA Home Page

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	Ru
01	SDAT01 - Real Property TAX Annual Billing	RPTAX	STMD	An
02	SDAT01 - Real Property TAX Monthly Revised Billing	RPTAX	STMD	Mo
03	SDAT01 - Real Property TAX Monthly Update	PPTAX	STMD	Mo
04	SDAT01 - Real Property TAX Monthly File Export	RPTAX	STMD	Mo
05	SDAT04 - New Construction	RPTAX	STMD	Qu
06	SDAT02 - Home Owner Credit	RPTAX	STMD	Bi-
07	SDAT03 - Personal Property Tax	PPTAX	STMD	Bi-
08	PU - Public Utility	PUTAX	TRSY	Dai
09	DEP Solid Waste Charges	RPTAX	DEPR	Dai
10	DEP Storm Water Charges	PPTAX	DEPS	An
11	WSSC Charges	RPTAX	WSSC	Qu
12	Real Property Tax Special Charges	RPTAX	TRSY	An
13	Lenders	RPTAX	TRSY	An
14	Real Property Tax Special Credit	RPTAX	TRSY	An
15	SDAT01 - Real Property TAX Rollover	RPTAX	STMD	An

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.

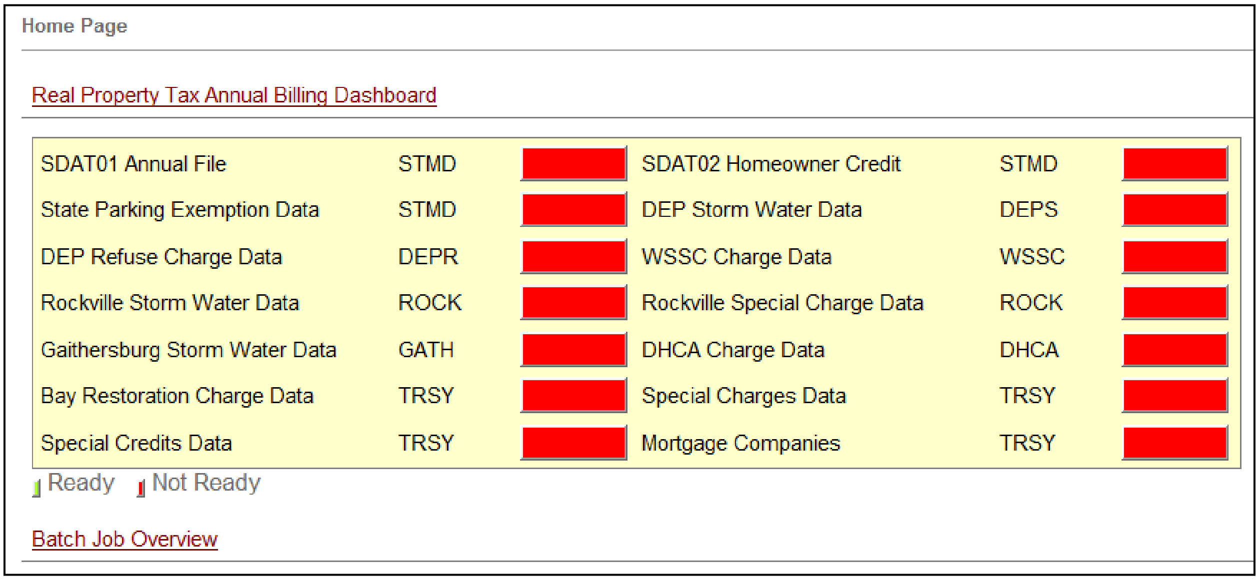


Figure 3A - Data Contribution Change Indication – Before

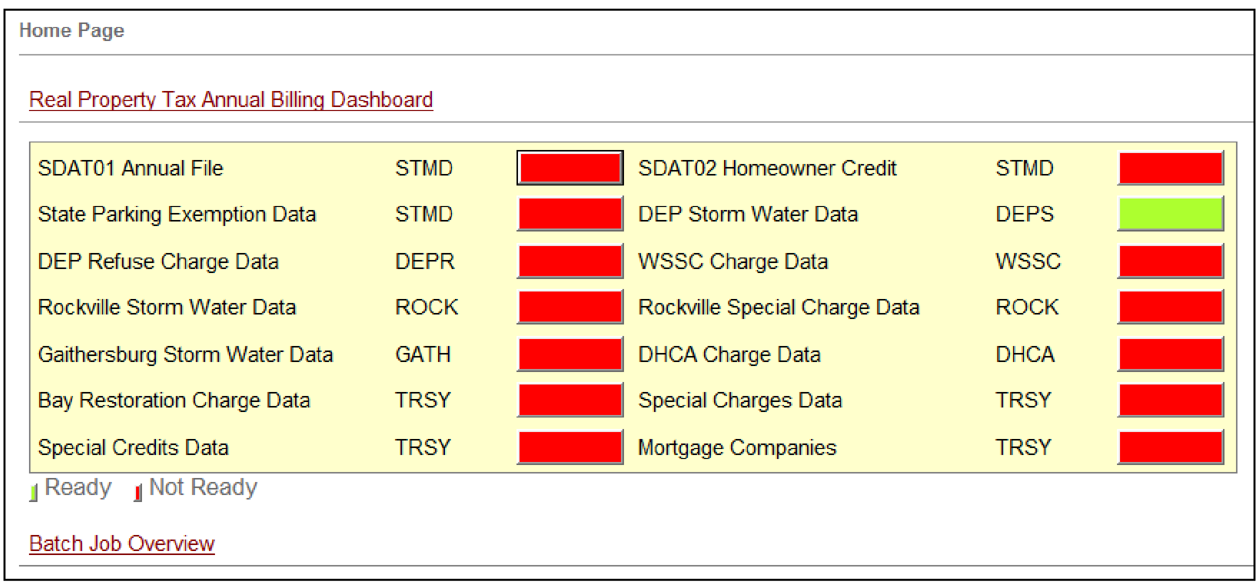


Figure 3B - Data Contribution Change Indication – After

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.

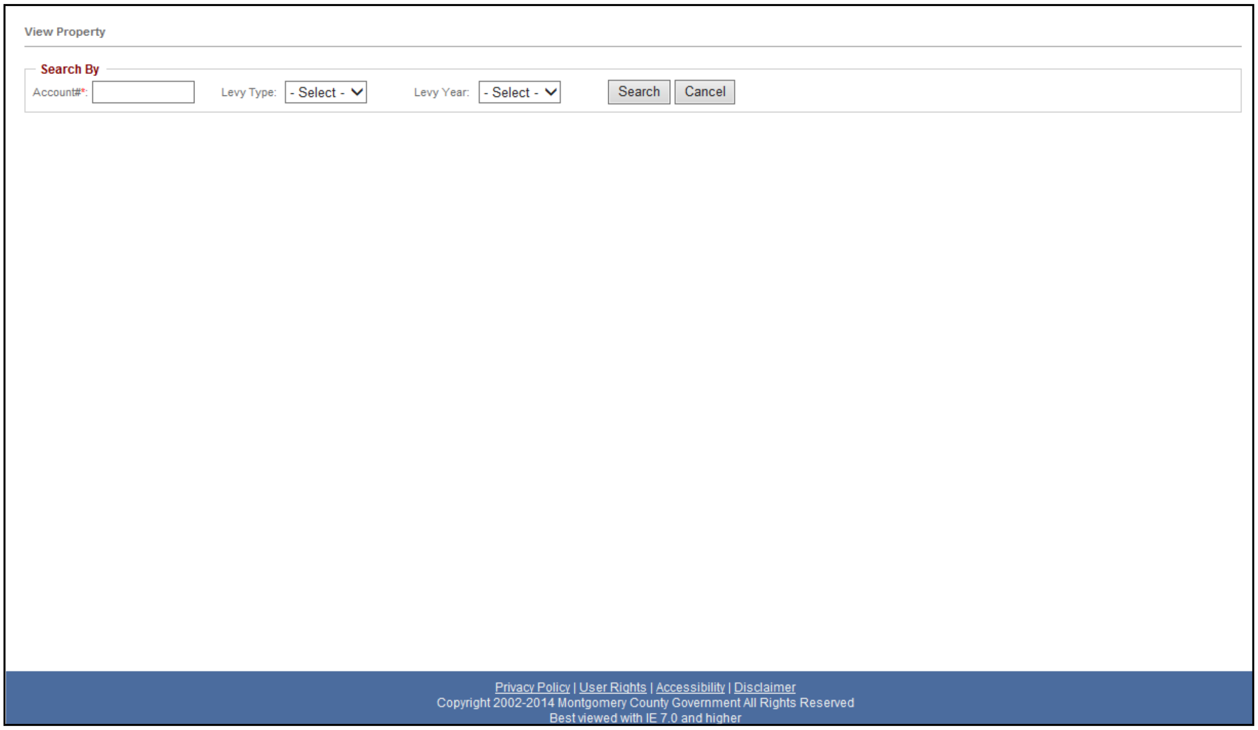
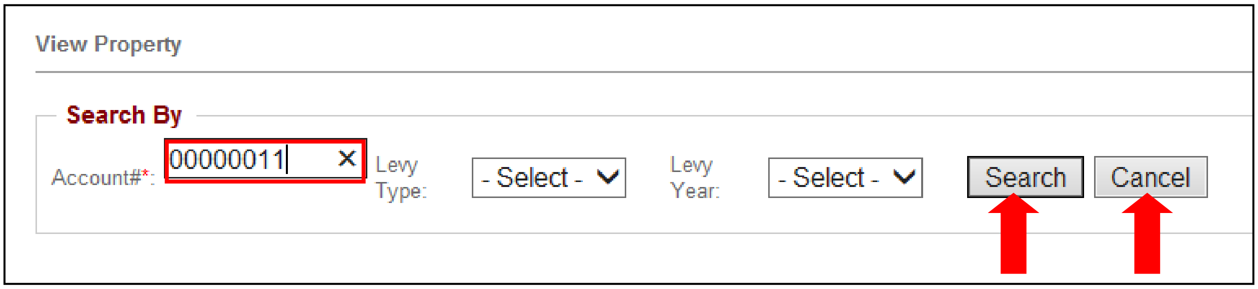


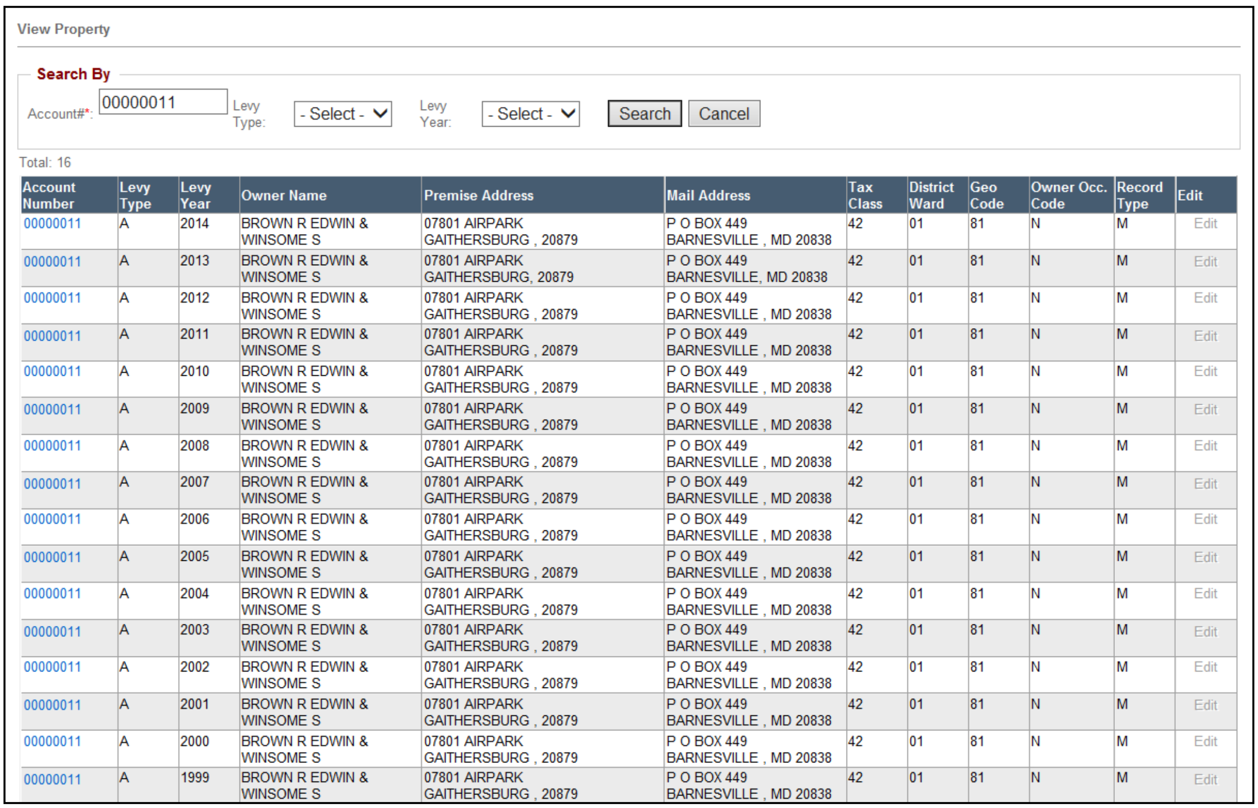
Figure 5 – View Property

To Search for an Account

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

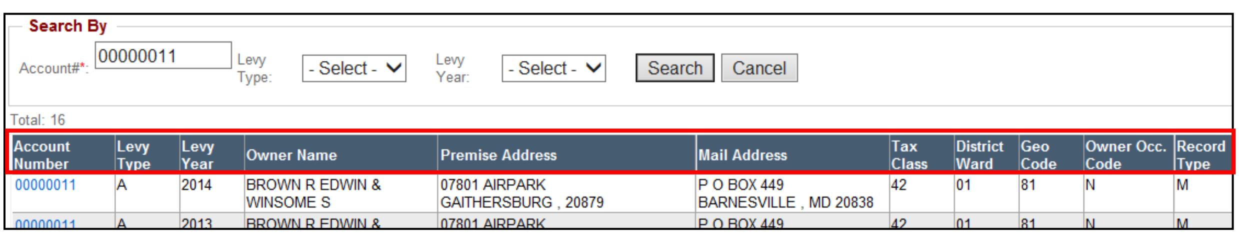


In this example, upon searching for Account #00000011, a table populates with the account records for each levy year (dating back to 1999).



Account Number	Levy Type	Levy Year	Owner Name	Premise Address	Mail Address	Tax Class	District Ward	Geo Code	Owner Occ. Code	Record Type	Edit
00000011	A	2014	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
00000011	A	2013	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG, 20879	P O BOX 449 BARNESVILLE, MD 20838	42	01	81	N	M	Edit
00000011	A	2012	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
00000011	A	2011	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
00000011	A	2010	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
00000011	A	2009	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
00000011	A	2008	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
00000011	A	2007	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
00000011	A	2006	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
00000011	A	2005	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
00000011	A	2004	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
00000011	A	2003	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
00000011	A	2002	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
00000011	A	2001	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
00000011	A	2000	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M	Edit
00000011	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.

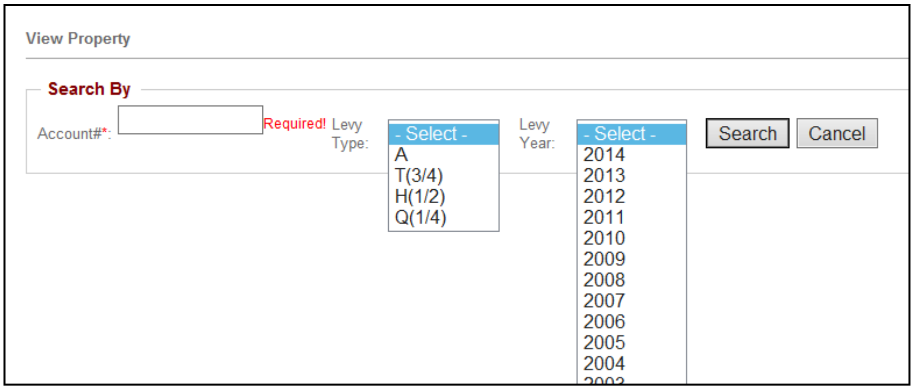


Account Number	Levy Type	Levy Year	Owner Name	Premise Address	Mail Address	Tax Class	District Ward	Geo Code	Owner Occ. Code	Record Type
00000011	A	2014	BROWN R EDWIN & WINSOME S	07801 AIRPARK GAITHERSBURG , 20879	P O BOX 449 BARNESVILLE , MD 20838	42	01	81	N	M
00000011	A	2013	BROWN R EDWIN &	07801 AIRPARK	P O BOX 449	42	01	81	N	M

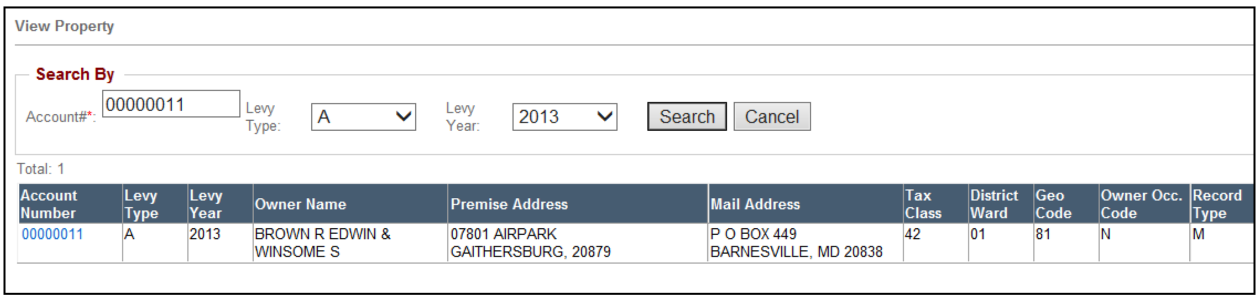
Additional Notes:

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 Addre
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 WOO 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							

Select DHCA Functions

From the TAS Home Page, DHCA users have the option to select one of two functions located under the “DHCA” tab:

1. Manage DHCA Charges
2. View Transaction Change Log

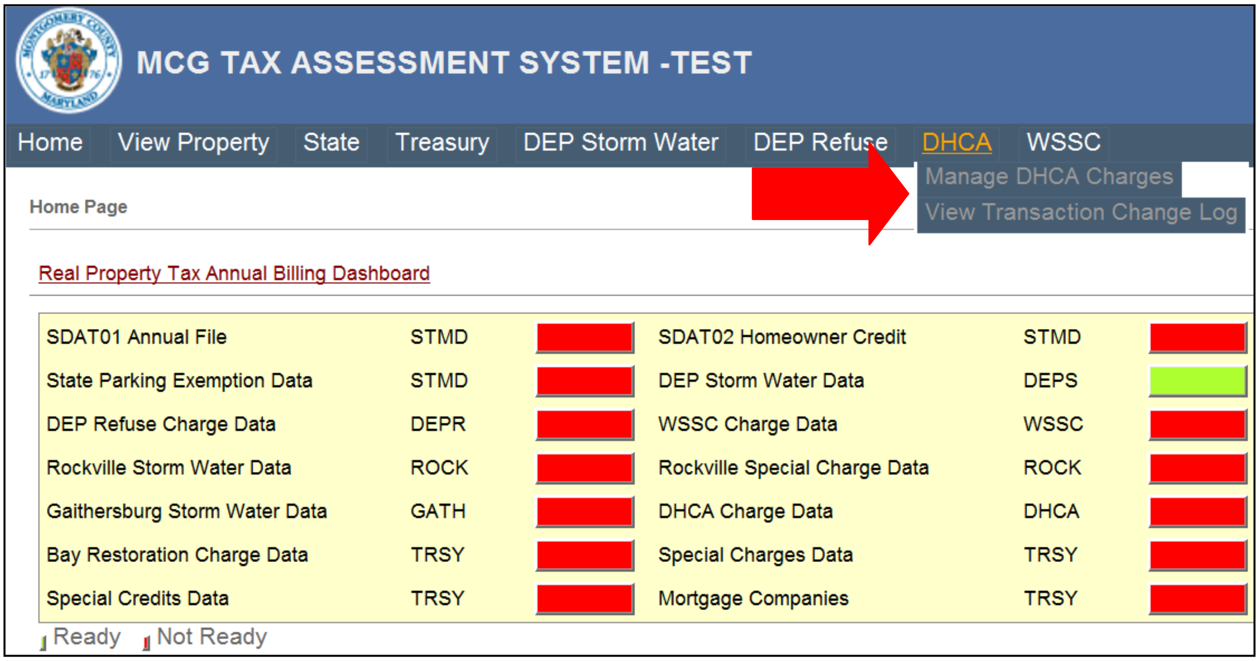
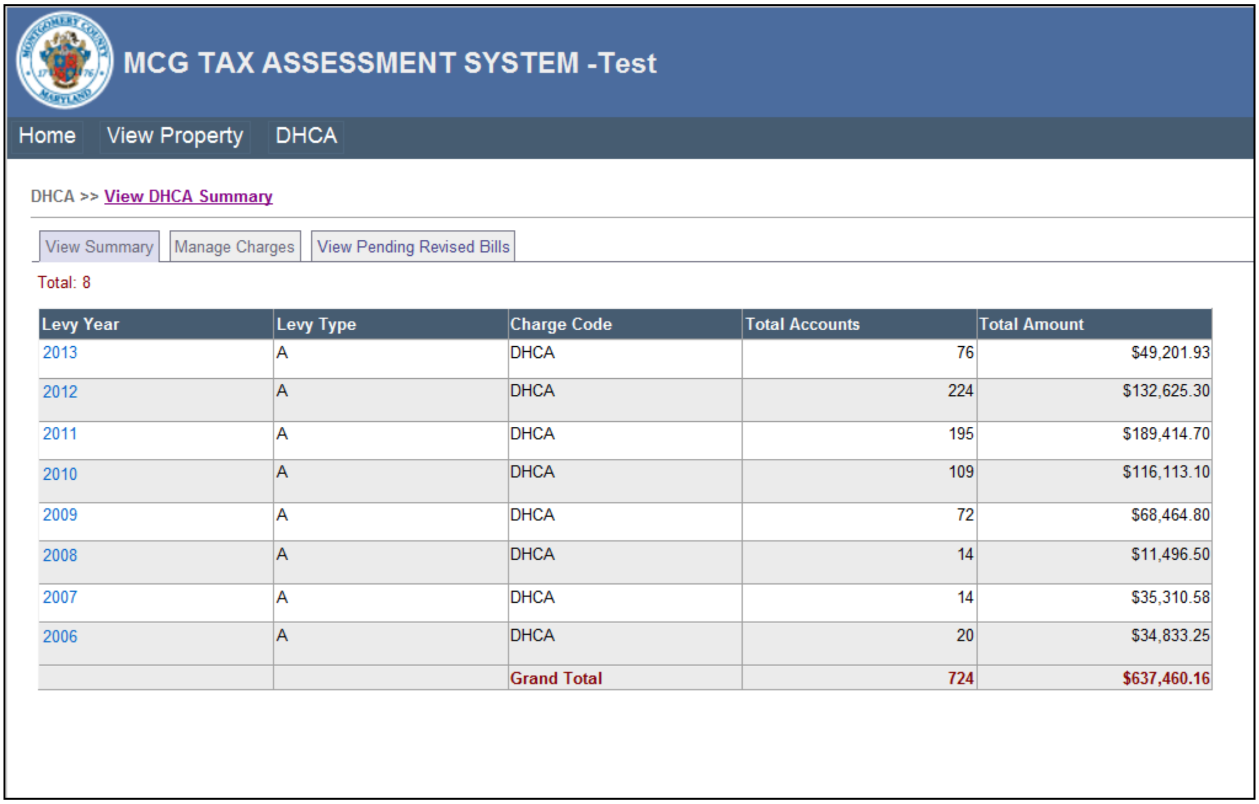


Figure 6 – Select DHCA Functions

Manage Charges

Upon selecting “Manage Charges” from the DHCA menu, users are directed to a page with three tabs:

1. View Summary
2. Manage Charges
3. View Pending Revised Bills



Levy Year	Levy Type	Charge Code	Total Accounts	Total Amount
2013	A	DHCA	76	$49,201.93
2012	A	DHCA	224	$132,625.30
2011	A	DHCA	195	$189,414.70
2010	A	DHCA	109	$116,113.10
2009	A	DHCA	72	$68,464.80
2008	A	DHCA	14	$11,496.50
2007	A	DHCA	14	$35,310.58
2006	A	DHCA	20	$34,833.25
		Grand Total	724	$637,460.16

Figure 7 – Manage DHCA Charges

View Summary

The first tab on the "Manage Charges" screen is "View DHCA Summary". The table within this tab displays total accounts and total charge amounts per levy year. By clicking on the hyperlink in the "Levy Year" column, users are directed to the "Manage Charges" tab which will only display data for the selected year.

DHCA >> View DHCA Summary

View Summary | Manage Charges | View Pending Revised Bills

Total: 8

Levy Year	Levy Type	Charge Code	Total Accounts	Total Amount
2013	A	DHCA	76	$49,201.93
2012	A	DHCA	224	$132,625.30
2011	A	DHCA	195	$189,414.70
2010	A	DHCA	109	$116,113.10
2009	A	DHCA	72	$68,464.80
2008	A	DHCA	14	$11,496.50
2007	A	DHCA	14	$35,310.58
2006	A	DHCA	20	$34,833.25
		Grand Total	**724**	**$637,460.16**

Figure 8 – View Summary

Manage Charges

The second tab on the “Manage Charges” screen is “Manage DHCA Charges”. Here, DHCA users may add, edit, or remove DHCA charges to current or previous levy years.

This table provides the account number, charge amount, and a log to indicate the date created and date updated for each record.

DHCA >> Manage DHCA Summary

View Summary | Manage Charges | View Pending Revised Bills

Search By

Account Number: [ ] Search Cancel

Total: 224

1 2 3 4 5 6 7 8 9 10 ... >>

Account Number	Agency Code	Levy Type	Levy Year	Charge Code	Charge Amount	Created By	Date Created	Updated By	Date Updated	Revised?	Edit
00002101	DHCA	A	2012	DHCA	411.61		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00021387	DHCA	A	2012	DHCA	2775.72		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00024313	DHCA	A	2012	DHCA	361.09		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00028504	DHCA	A	2012	DHCA	748.20		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00064934	DHCA	A	2012	DHCA	234.38		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00078452	DHCA	A	2012	DHCA	896.12		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00090567	DHCA	A	2012	DHCA	1298.60		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00108993	DHCA	A	2012	DHCA	260.72		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00254997	DHCA	A	2012	DHCA	939.48		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00258084	DHCA	A	2012	DHCA	338.74		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00263800	DHCA	A	2012	DHCA	629.10		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00278696	DHCA	A	2012	DHCA	726.72		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00292048	DHCA	A	2012	DHCA	757.80		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00295634	DHCA	A	2012	DHCA	863.76		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00305916	DHCA	A	2012	DHCA	478.12		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
	DHCA	A	2012	DHCA						☐	Insert

Figure 9 – Manage Charges

To Add a Charge

1. Navigate to the bottom of the "Manage Charges" table to find empty fields in the Account Number and Charge Amount columns.

Account Number	Agency Code	Levy Type	Levy Year	Charge Code	Charge Amount	Created By	Date Created	Updated By	Date Updated	Revised?	Edit
00002101	DHCA	A	2012	DHCA	411.61		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00021387	DHCA	A	2012	DHCA	2775.72		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00024313	DHCA	A	2012	DHCA	361.09		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00028504	DHCA	A	2012	DHCA	748.20		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00064934	DHCA	A	2012	DHCA	234.38		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00078452	DHCA	A	2012	DHCA	896.12		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00090567	DHCA	A	2012	DHCA	1298.60		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00108993	DHCA	A	2012	DHCA	260.72		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00254997	DHCA	A	2012	DHCA	939.48		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00258084	DHCA	A	2012	DHCA	338.74		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00263800	DHCA	A	2012	DHCA	629.10		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00278696	DHCA	A	2012	DHCA	726.72		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
0029204	DHCA	A	2012	DHCA	757.80		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
0029563	DHCA	A	2012	DHCA	863.76		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
003059	DHCA	A	2012	DHCA	478.12		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
	DHCA	A	2012	DHCA						☐	Insert

2. Click in the empty Account Number field and add the account number.
3. Click in the empty Charge Amount field and add the charge for that account.
4. Click on the "Insert" hyperlink in the Edit column.

00278696	DHCA	A	2012	DHCA	726.72		PM		PM	False	
00292048	DHCA	A	2012	DHCA	757.80		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00295634	DHCA	A	2012	DHCA	863.76		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00305916	DHCA	A	2012	DHCA	478.12		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00000011	DHCA	A	2012	DHCA	100.00 ×					☐	Insert

The new charge code will populate and appear at the top of the table. In this example we added a $100.00 charge to Account Number 00000011.

Search By

Account Number: [ ] Search Cancel

Total: 225

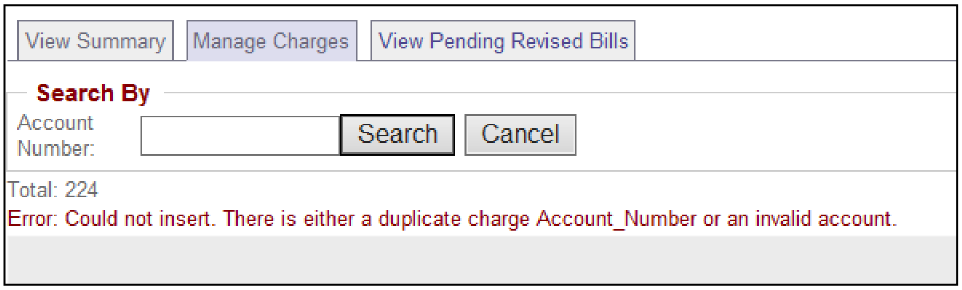
1 2 3 4 5 6 7

Account Number	Agency Code	Levy Type	Levy Year	Charge Code	Charge Amount	Created By	Date Created	Updated By	Date Updated
00000011	DHCA	A	2012	DHCA	100.00	TESTPCAP6	3/31/2014 11:46:40 AM		3/31/2014 11:46:40 AM
00002101	DHCA	A	2012	DHCA	411.61		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM

Additional Notes:

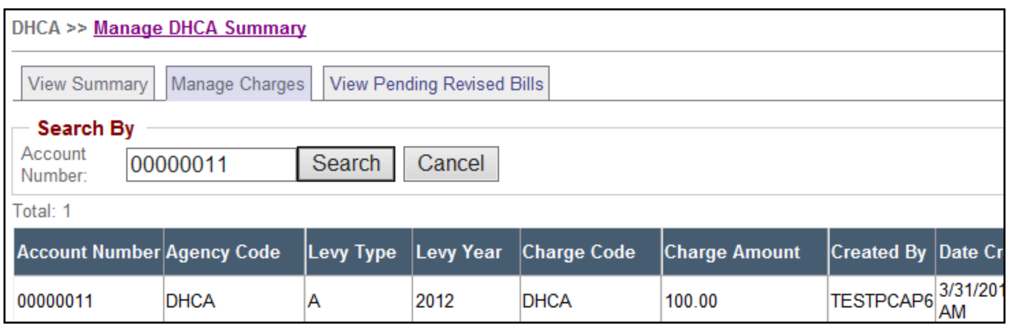
You must use decimals when entering in the Charge Amount.

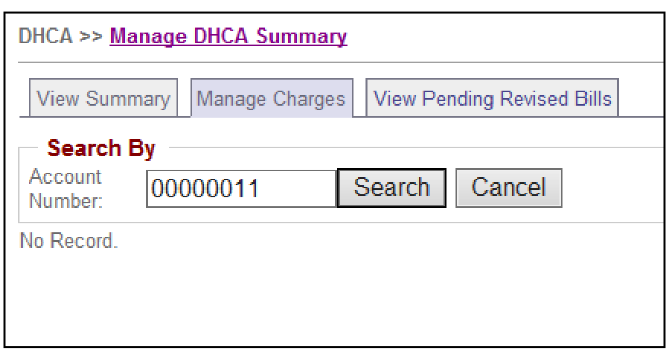
You will receive the following error if you are attempting to add an already existing or invalid charge or account:



If you are unsure if a record for a given account exists in a particular levy year, you may search by account number in the "Search By" field at the top of the page. TAS will only search records pertaining to the levy year you have selected.

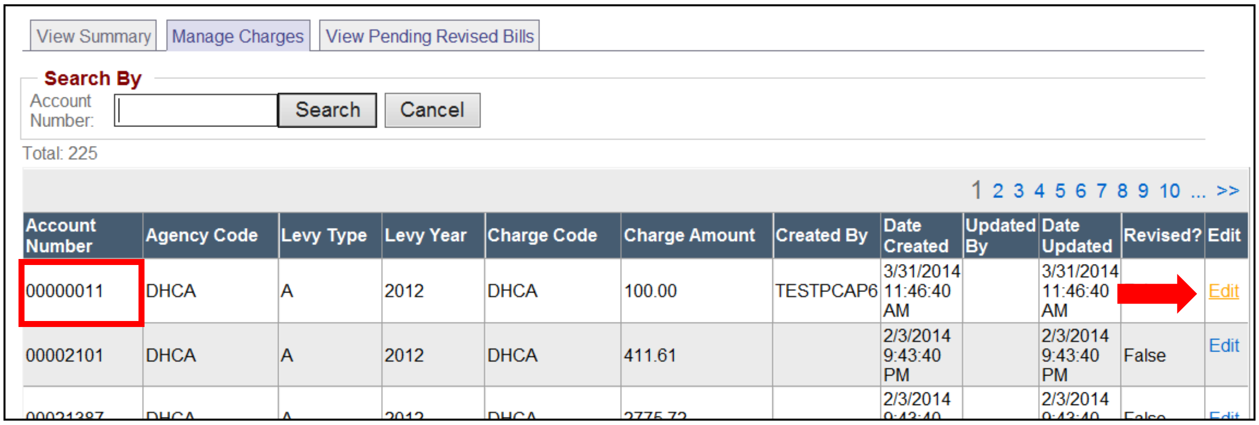
For example, I can search for account number 00000011 in levy year 2012 and find a result. However, if I search in levy year 2011, results reflect no record.



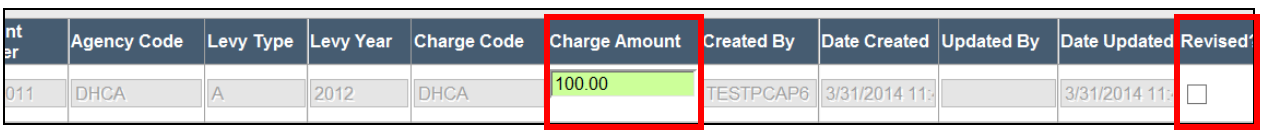


To Edit a Charge

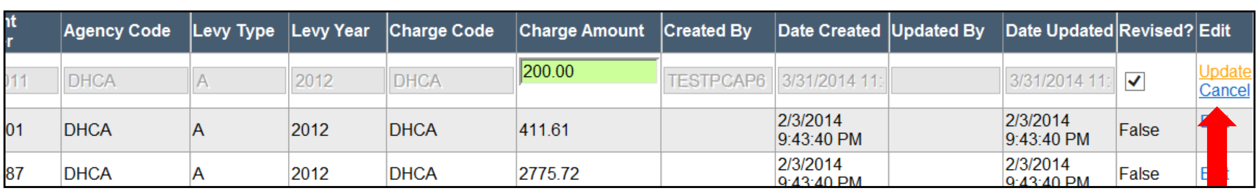
1. Identify the record you wish to modify. Click the “Edit” hyperlink in the Edit column in that row.



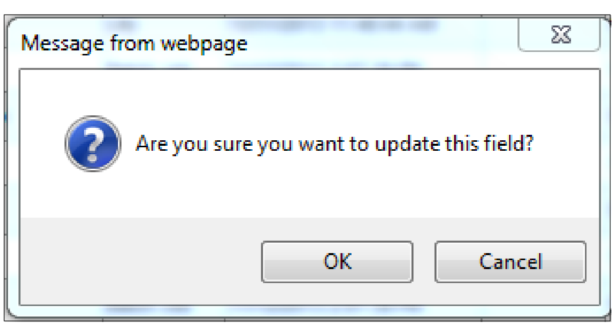
The Charge Amount field and “Revised” checkbox will unlock for editing.



2. Edit the charge amount and check the box in the “Revised” column to flag the revision for billing. Click the “Update” hyperlink in the Edit column. *Or select cancel.*



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. In this example, we revised the charge amount on Account #00000011 from $100 to $200. The update history is also logged within the table.

Note: The modificaiton also appears in the susequent “View Pending Revised Bills” tab.

View Summary | Manage Charges | View Pending Revised Bills

Search By

Account Number: [ ] Search Cancel

Total: 225

1 2 3 4 5 6 7 8

Account Number	Agency Code	Levy Type	Levy Year	Charge Code	Charge Amount	Created By	Date Created	Updated By	Date Updated
00000011	DHCA	A	2012	DHCA	200.00	TESTPCAP6	3/31/2014 11:46:40 AM	TESTPCAP6	3/31/2014 3:19:47 PM
00002101	DHCA	A	2012	DHCA	411.61		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM
00021387	DHCA	A	2012	DHCA	2775.72		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM

To Remove a Charge

1. Follow the steps to edit a charge, except change the charge amount to $0.00, flag for revision, and select “Update”.

nt r	Agency Code	Levy Type	Levy Year	Charge Code	Charge Amount	Created By	Date Created	Updated By	Date Updated	Revised?	Edit
011	DHCA	A	2012	DHCA	0.00	TESTPCAP6	3/31/2014 11:	TESTPCAP6	3/31/2014 3:1	✓	Update Cancel
01	DHCA	A	2012	DHCA	411.61		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	E
87	DHCA	A	2012	DHCA	2775.72		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
13	DHCA	A	2012	DHCA	361.09		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit

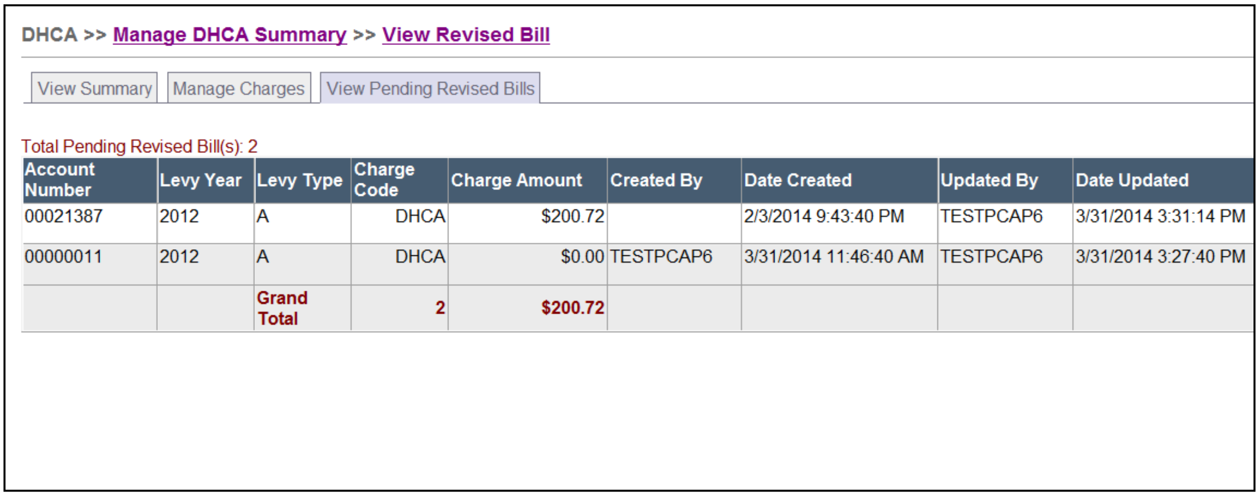
The change will be reflected in this table and in the subsequent “Pending Revised Bills” tab.

Account Number	Agency Code	Levy Type	Levy Year	Charge Code	Charge Amount	Created By	Date Created	Updated By	Date Updated	Revised?	Edit
00000011	DHCA	A	2012	DHCA	0.00	TESTPCAP6	3/31/2014 11:46:40 AM	TESTPCAP6	3/31/2014 3:27:40 PM	False	Edit
00002101	DHCA	A	2012	DHCA	411.61		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit
00021387	DHCA	A	2012	DHCA	2775.72		2/3/2014 9:43:40 PM		2/3/2014 9:43:40 PM	False	Edit

View Pending Revised Bills

The final tab on the “Manage Charges” screen is “View Pending Revised Bills”. When data is modified, the pending revisions applicable to all levy years are displayed here until processed.

Information in this table includes the account number, levy year and type, charge amount, and update information. It also provides a grand total of the pending revised charge amounts.



DHCA >> Manage DHCA Summary >> View Revised Bill

View Summary | Manage Charges | View Pending Revised Bills

Total Pending Revised Bill(s): 2

Account Number	Levy Year	Levy Type	Charge Code	Charge Amount	Created By	Date Created	Updated By	Date Updated
00021387	2012	A	DHCA	$200.72		2/3/2014 9:43:40 PM	TESTPCAP6	3/31/2014 3:31:14 PM
00000011	2012	A	DHCA	$0.00	TESTPCAP6	3/31/2014 11:46:40 AM	TESTPCAP6	3/31/2014 3:27:40 PM
		Grand Total	2	$200.72				

Figure 10 – View Pending Revised Bills

<u>Additional Notes:</u> If a charge code was edited, but was not flagged for revision, this change will not be picked up for revised billing (and therefore will not appear in this table).

Only the most recent revision will appear in this table and be applied to the revised billing process.

View Transaction Change Log

Upon selecting “View Transaction Change Log” from the DHCA menu, users are directed to an inquiry-only screen. The table on this page serves to provide DHCA with a full log of the transactions made to each account.

This screen displays the up-to-date information to include the account number, levy year and type, charge amounts, and charge codes. The log records the date created and updated in addition to the user who logged each change.

To search, users must provide the “Date From” and “Date To” as demarcated by the red asterisk (*). To narrow the search, users may also provide an account number and/or levy year.

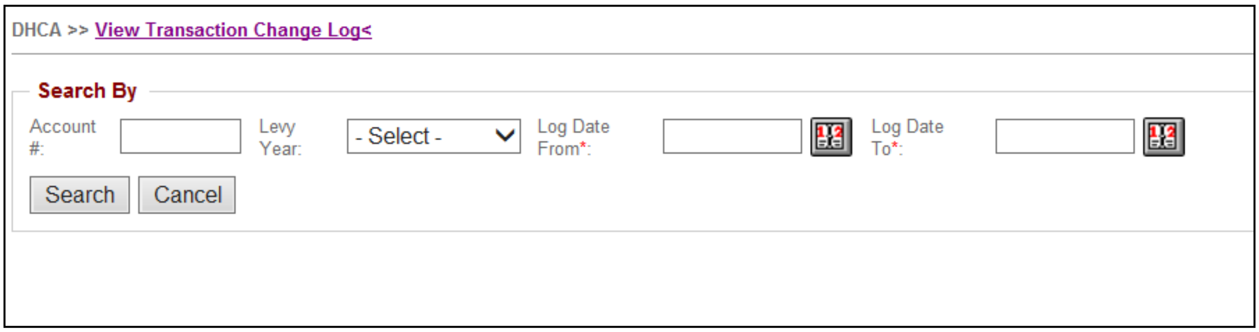
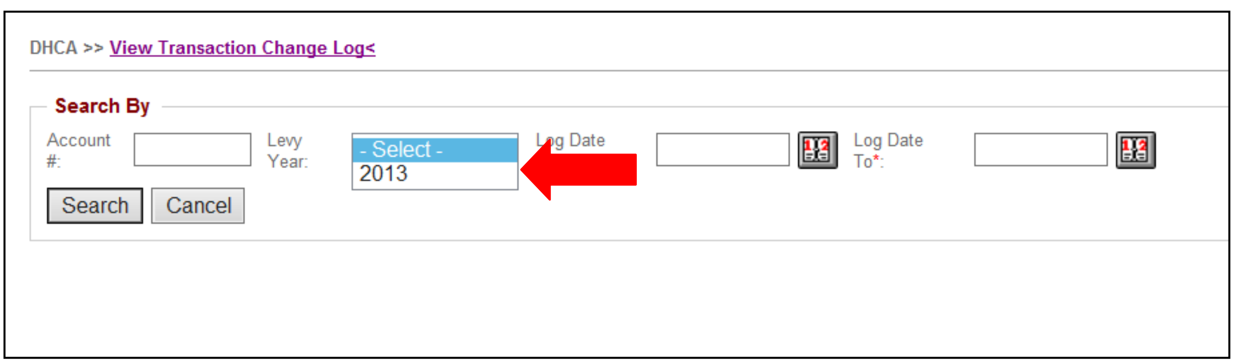


Figure 11 – View Transaction Change Log

<u>Additional Notes:</u> Users may preview data for another levy year by selecting from the drop down menu



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 1st to June 30th
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