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Account Information Screen

The account information screen contains parcel identification information as well as current assessment summary information. Within the Vision system, a parcel may be classified as commercial, industrial, condominium, condominium main, residential, or vacant. Condominium main parcels do not generally hold value, but rather serve to link condominium units and provide a conduit for valuation through configuration of the modeling engines.

The first section of the Account Information Screen is the self-named Account Information section. The account information section displays a multiplicity of identifiers populated with information specific to each jurisdiction employing the software. A parcel's physical address, owner name, and if applicable building name are also found in this location. This section also displays key parcel states such as the date created and primary building use.

MBLU – MBLU is an acronym for Map, Block, Lot, and Unit, frequently serving as a unique parcel identifier. In addition to map, block, lot and unit four additional fields may display depending upon user settings. Specifically, these are Map Cut, Block Cut, Lot Cut and Unit Cut. Users may edit these fields, if permitted, in the administrative settings by checking the Edit MBLU check box. The associated table and field names for these data are as follows:

>   **Map**: *REALMAST.REM_MBLU_MAP*
>
>   **Map Cut**: *REALMAST.REM_MBLU_MAP_CUT*
>
>   **Block**: *REALMAST.REM_MBLU_BLOCK*
>
>   **Block Cut**: *REALMAST.REM_MBLU_BLOCK_CUT*
>
>   **Lot**: *REALMAST.REM_MBLU_LOT*
>
>   **Lot Cut**: *REALMAST.REM_MBLU_LOT_CUT*
>
>   **Unit**: *REALMAST.REM_MBLU_UNIT*
>
>   **Unit Cut**: *REALMAST.REM_MBLU_UNIT_CUT*

Account Number *(REALMAST.REM_ACCT_NUM)* – The Account Number is a parcel identifier field. This field may contain alphanumeric codes up to 30 characters in length.

W-P-B – W-P-B is an acronym for Ward, Precinct and Block and may compose another means of identifying a parcel. The associated table and field names for these data are as follows:

>   **Ward**: *PARCEL.PRC_WARD*
>
>   **Precinct**: *PARCEL.PRC_PRECINCT*
>
>   **Block**: *PARCEL.PRC_SUBDIV*

Property Location *(REALMAST.REM_PRCL_LOCN)* –

The Property Location identifier is comprised of multiple available address part fields that combine to form the parcel's legal address, which may be distinct from the owner's address. In entering these data, users should follow their jurisdiction's business rules for data consistency. The associated available table and field names for these data are as follows:

Standard Fields

>   **Street Number**: *REALMAST.REM_PRCL_LOCN_NUM_CHAR*

Street Prefix: *REALMAST.REM_PRCL_LOCN_STR_PFX*

Street Name: *REALMAST.REM_PRCL_LOCN_STREET*

Street Suffix: *REALMAST.REM_PRCL_LOCN_STR_SFX*

Apartment Number: *REALMAST.REM_PRCL_LOCN_APT*

Additional Fields

Street Pre-direction: *REALMAST.REM_PRCL_LOCN_PRE_DIRECTION*

Street Post-direction: *REALMAST.REM_PRCL_LOCN_POST_DIRECTION*

Street Type: *REALMAST.REM_PRCL_LOCN_STREET_TYPE*

Apartment Type: *REALMAST.REM_PRCL_LOCN_APT_TYPE*

City: *REALMAST.REM_PRCL_CITY*

State: *REALMAST.REM_PRCL_STT*

Zip: *REALMAST.REM_PRCL_ZIP*

County: *REALMAST.REM_PRCL_LOCN_COUNTY*

Country: *REALMAST.REM_PRCL_LOCN_COUNTRY*

Owner's Name *(REALMAST.REM_OWN_NAME)* – The owner's name displayed on the account information screen is updated with the data from the current owner on the Owner & Deed screen. The owner's name may include joint owners or legal entities and is up to 85 characters in length.

* Building Name (Parcel Name) *(REALMAST.REM_BLDG_NAME)* – The Building Name field provides a place for a parcel level building or parcel name and may be used as an identifier. The data in this field may be up to 60 characters in length and is not mandatory.

Alternate ID *(REALMAST.REM_ALT_PRCL_ID)* – The Alternate Parcel ID Number may be up to 35 characters. This field is a cross-reference to any previous numbering system.

*Cross Street 1 & 2 *(REALMAST.REM_CROSS_STREET_1 & REALMAST.REM_CROSS_STREET_2)* – The Cross Street fields may be used to locate a parcel by intersection if populated.

Owner Occupied *(PARCEL.PRC_OWNER_OCC; 1-when checked, 0-when unchecked)* – The Owner Occupied field is a flag indicating the parcel is occupied by the owner.

Visited *(REALMAST.REM_FIELD_REVIEW; 1-when checked, 0-when unchecked)* – The Visited field is a flag indicating a completed field review.

Parcel Status *(REALMAST.REM_PARCEL_STATUS)* – The parcel status field indicates if a parcel is currently Active (A), Inactive (I), or a Future (F) parcel. Future and Inactive parcels are excluded from billing.

Create Date *(PARCEL.PRC_CREATE_DATE)* – The Create Date field contains the date the parcel was created. This field is automatically populated by the Vision CAMA software.

Legal Area *(REALMAST.REM_LEGAL_AREA)* – The Legal Area indicates a parcel's total legal land area. The datum in this field is the aggregation of a parcel's land line areas and may be displayed as square footage or acreage depending on Admin settings.

Primary Use Code *(REALMAST.REM_USE_CODE)* – The Use Code is a three or four digit, user-defined code containing a parcel's primary land use. These values may be distinct from building use codes if so

configured and are defined on the Land Use screen under the Land Tables branch of the Table Maintenance Application Explorer Tree.

PIN *(REALMAST.REM_PIN)* – PIN is an acronym for Property Identification Number and is another means for parcel identification. The data in this field may be up to 35 characters in length and is not mandatory to populate.

User Field *(REALMAST.REM_USRFLD)* – The Account Information User Field provides jurisdictions the option to include additional data on the account information screen. This field allows for a 6 digit code, with a 40 character description.

The second section of the Account Information Screen is Assessing Neighborhoods. Assessing Neighborhoods contains a parcel's neighborhood assignments, which are used to assign valuation models. This section also contains two fields for workflow tracking.

Res. NBHD *(PARCEL.PRC_RES_DIST)* – The Res NBHD field contains a parcel's residential neighborhood assignment and may be edited using the drop down list. If a building's primary land use is residential, this field determines which valuation models are assigned to the building.

Comm. NBHD *(PARCEL.PRC_CMRC_DIST)* – The Comm NBHD field contains a parcel's commercial neighborhood assignment and may be edited using the drop down list. If a building's primary land use is commercial, this field determines which valuation models are assigned to the building.

Condo NBHD *(PARCEL.PRC_CONDO_DIST)* – The Condo NBHD field contains a parcel's condominium neighborhood assignment and may be edited using the drop down list. If a building's primary land use is condominium, this field determines which valuation models are assigned to the building.

The third section of the Account Information Screen is the Current Assessment Summary Grid. This section of the Account Information screen summarizes the parcel's current assessed value, itemizing land, buildings, and outbuildings, as the case warrants. This grid reflects information calculated in other locations. The totals are updated automatically as users make changes, unless Value Freeze is enabled. If Value Freeze is on, users will see an additional column called Proposed Value, which will reflect Vision calculated values.

Without Value Freeze:

Code	Description	Type	Amount
1021	RESIDNTL	Building	$456,000

Total Assessed Parcel Value   **$456,000**

With Value Freeze:

Current Assessment				
Code	Type Description	Type	Total Assessed	Total Proposed As:
460	Building	Building	$501,600	$501,600
460	Land	Land	$163,900	$165,000
Total Assessed Parcel Value			$665,500	$666,600

Code (Assessment Summary Code) *(ASSHIST.ASH_CODE)* – The Code field displays the component's summary use code.

Description *(ASSHIST.ASH_DESC)* – The Description field contains the corresponding component description.

Type *(ASSHIST.ASH_TYPE)* – The Type field indicates whether the grid line displays land, building, outbuilding or extra feature data.

Amount *(ASSHIST.ASH_ASSESS_VAL)* – The Amount field reflects is the assessed value for the corresponding component code.

*Current Value *(ASSHIST.ASH_ASSESS_VAL)* – When value freeze is enabled, the Current Value field reflects the frozen assessed component values. The Amounts will not change upon recalculation if value freeze is enabled.

*Proposed Value *(ASSHIST.ASH_PROP_ASSESS_VAL)* – When value freeze is enabled, the Proposed Value field reflects the calculated assessed component values. These values update upon recalculation. As such, these data will likely differ from Current Value when value freeze is enabled.

Total Assessment *(AHDATE.AHD_TTL_ASSESS)* – The Total Assessed Parcel Value field is the combined total of each of the Amount fields in the grid. It represents the total parcel assessed value.

*Current Total Assessment *(AHDATE.AHD_TTL_ASSESS)* – The Current Total Assessment field is the combined frozen assessed values for all components in the grid. The Total Assessment will not change while value freeze is enabled.

*Proposed Total Assessment *(AHDATE.AHD_PROP_TTL_ASSESS)* – The Proposed Total Assessment field is the combined calculated assessed values for all components in the grid. This total may differ from the Current Total Assessment when value freeze is enabled. In a frozen state, the Proposed value will update with recalculation or attribute edit while Current will not.

The fourth section of the Account Information Screen displays the Condo Main information. This information is used to link all condo units together by complex. The Condo Main is not by itself a billable account but instead serves as an umbrella parcel linking all units within a complex. The attributes listed below are used to identify the linking data. These values are both entered and displayed on the Condo Main section of the Account Information Screen.

Condo Main	
Parcel Id	105421
Description	MERRIAM AV
Number	61

Parcel ID *(PARCEL.PRC_CMPLX)* – The Complex field contains the Vision PID number for the parcel's condo main.

Description *(PARCEL.PRC_COMPLX_DESC)* – The description field contains the name of the condominium complex as defined in the CONDO table.

Complex ID *(PARCEL.PRC_COMPLX_NUM)* – The number field contains a condominium's Complex ID Number as defined in the CONDO table.

The final section of the Account Information screen contains two fields to indicate an Associated Parcel related to the selected parcel. The Associated Parcel feature values multiple contiguous parcels as a single economic unit using data from a primary parcel. The resulting total assessed value is distributed among the secondary parcels in the association. Further configuration for associated parcels is done on the Associated Parcels screen.

Associated Parcel ID *(REALMAST.REM_ASSOC_PARCEL_ID)* – Upon association, the Associated Parcel ID field contains the primary parcel's Parcel ID (PID). If the subject parcel is not associated with another parcel, this field will remain blank.

Percent *(REALMAST.REM_ASSOC_PCT)* – The Percent field contains the subject parcel's legal and land area relationship to the total of the associated parcels' legal and land areas. This field is populated automatically by the application.

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Owner and Deed Screen

The Owner & Deed Information screen integrates data from transfer records and the Owner and Mailing Address Maintenance utilities. These utilities have multiple screens shown below. Row selection in the grid returns individual transfer information as well as summary grantee information.

The first section is the Owner Information Section. This section displays a brief overview of the owner information for the selected record, which includes grantee name(s) and mailing address.

To view detailed owner information, go to the Owner Maintenance view, which contains additional fields available to track owner data. The Owner table in Vision is a central table that holds all owner information. It holds typical information such as the owner's account number, owner names, marital status, and can hold sensitive information such as date of birth, SS Number, phone number, and email.

Owner Information

Owner Full Name *(OWNER.OWN_NAME1)* – The Owner Full Name field is populated directly or auto populated by entering the First Name, Middle Initial, and Last Name.

Edit Full Name – The Override Owner Name check box enables direct Owner Full Name entry. When the check box is empty, the Owner Full Name is populated with the concatenated First, Middle and Last Name field data.

Email *(OWNER.OWN_EMAIL1)* – The Email field holds the owner's email contact information.

Phone *(OWNER.OWN_PHONE1)* – The Phone field contains the owner's contact phone number.

Home Phone *(OWNER.OWN_PHONE_HOME)* – The Home Phone field contains the owner's home phone number.

Type *(OWNER.OWN_TYPE1)* – The Owner Type field contains information indicating form of ownership or interest relationship. For example, this could indicate a primary owner.

DOB *(OWNER.OWN_DOB1)* – The DOB field indicates the owner's Date of Birth.

SSN# *(OWNER.OWN_SSN1)* – The SSN# field contains the owner's Social Security Number.

Marital Code *(OWNER.OWN_MARTIAL_CODE1 & OWNER.OWN_MARTIAL_CODE1_DESC)* – The Marital Code contains the owner's state in a Partnership, Married, Widowed, Divorced, or Single. This field utilizes a drop down list.

Reference *(OWNER.OWN_REF1)* – The Reference field stores jurisdiction specific owner reference data.

Veteran *(OWNER.OWN_VET1)* – The Veteran field stores the owner's veteran status.

Comment *(OWNER.OWN_COMMENT1)* – The Comment field contains comments or notes about the owner for tracking purposes.   This field can hold up to 500 characters.

CO Owner Information

Co-Owner Full Name *(OWNER.OWN_NAME2)* – The Co-Owner Full Name field is populated directly or auto-populated by entering the First Name, Middle Initial, and Last Name information.

Edit Full Name – The Override Co-Owner Name check box enables direct Co-Owner Full Name entry. When the check box is empty, the Co-Owner Full Name is populated with the concatenated First, Middle and Last Name field data.

Email *(OWNER.OWN_EMAIL2)* – The Email field tracks the co-owner's email contact information.

Phone *(OWNER.OWN_PHONE2)* – The Phone field tracks the co-owner's contact phone number.

Owner Type *(OWNER.OWN_TYPE2)* – The Owner Type field contains information indicating form of ownership or interest relationship. For example, this could indicate secondary or co-owner.

DOB *(OWNER.OWN_DOB2)* – The DOB field contains the co-owners Date of Birth.

SSN# *(OWNER.OWN_SSN2)* – The SSN# field contains the co-owner's Social Security Number.

Marital Code *(OWNER.OWN_MARTIAL_CODE2 & OWNER.OWN_MARTIAL_CODE2_DESC)* – The Marital Code contains the co-owner's state in a Partnership, Married, Widowed, Divorced, or Single. This field utilizes a drop down list.

Reference *(OWNER.OWN_REF2)* – The Reference field stores jurisdiction specific owner reference data.

Veteran *(OWNER.OWN_VET2)* – The Veteran field stores the co-owner's veteran status.

Comment *(OWNER.OWN_COMMENT2)* – The Comment field contains comments or notes about the co-owner for tracking purposes. This field can hold up to 500 characters.

The next two sections contain the actual sale/transfer information. The Sale History table stores the transfers for each parcel.

The Primary Sale Information stores primary transfer data.

Sale Date *(SALEHIST.SLH_SALE_DATE)* – The Date of Sale field contains the date of the transfer or sale in an mm/dd/yyyy format.

Sale Type *(SALEHIST.SLH_SALE_TYPE)* – The Sale Type field indicates the nature of the transaction for which the transfer entry is made. For example, a type could be a family sale or a foreclosure. This field utilizes a user defined drop down list.

Sale Price *(SALEHIST.SLH_SALE_PRICE)* – The Sale Price field indicates the final price of the respective parcel transfer.

Book *(SALEHIST.SLH_BOOK)* – The Book field contains the legal book number in which the transfer of ownership is recorded.

Page *(SALEHIST.SLH_PAGE)* – The Page field holds the legal page number, indicating where the transfer of ownership is recorded within the legal book.

Validity Code *(SALEHIST.SLH_INSTRUMENT)* – The Validity code field contains a two-digit transfer instrument or validity code for the parcel. For example, a validity code could indicate that the transfer was verified by the grantor or grantee, or it could have been a Court Settlement. This field utilizes a drop down list.

Qualified? *(SALEHIST.SLH_QUALIFIED)* – The Qualified field indicates whether the transfer entry should be used for analysis purposes, effectively whether or not it is deemed an arms-length transaction.

Improved *(SALEHIST.SLH_IMPROVED)* – The Improved field indicates whether a parcel was vacant or improved at the time of the transfer.

Future *(SALEHIST.SLH_FUTURE)* – The Future field indicates whether the owner is the parcel's current or future owner and may be used to ensure that an assessment notice is delivered to the appropriate party. The state may be changed on an individual basis or through use of the Make Future Sales Current option in the Utility menu.

Notes *(SALEHIST.SLH_NOTES)* – The Notes field is used to record notes specific to the individual transfer. The field stores up to 255 characters.

The Additional Sale Information stores additional details relating to the transfer.

Deed Date *(SALEHIST.SLH_DEED_DATE)* – The Deed Date contains the date on the deed was created.

Deed Type *(SALEHIST.SLH_DEED_TYPE)* – The Deed Type field is an entry field used to track the type of deed recorded for this transfer. This field utilizes a user defined drop down list.

Certificate *(SALEHIST.SLH_CERTIFICATE)* – This field us used to store the certificate number associated with the transfer.

Record Date *(SALEHIST.SLH_RECORD_DATE)* – The Record Date contains the date on which the transfer was recorded.

Reference Num *(SALEHIST.SLH_REFERENCE_NUM)* – The Reference Number field is a direct entry field containing deed recording codes or numbers.

Validity Code 2 *(SALEHIST. SLH_INSTRUMENT2)* – The Validity code 2 field contains a two-digit transfer instrument or validity code for the parcel. This field functions the same as the primary validity code and is available for jurisdictions requiring alternate validity codes for reporting purposes.

Qualified 2 *(SALEHIST.SLH_QUALIFIED2)* – The Qualified 2 field indicates whether the transfer entry is deemed a qualified transfer in respect to validity code 2.

Flag 1 *(SALEHIST.SLH_USER_FLAG1)* – This user defined checkbox may be used to flag additional information relating to the transfer.

Flag 2 *(SALEHIST.SLH_USER_FLAG2)* – This user defined checkbox may be used to flag additional information relating to the transfer.

Stamp Tax *(SALEHIST.SLH_STAMP_TAX)* – The Stamp Tax field is used to store the real estate transfer fee associated with the transfer.

User Fields 1 – 7 – These user defined fields may be used to store additional jurisdiction specific data. They may be configured as a free form text field or as a user defined pick list in Configurations of Vision 8 in the Admin application.

> **User Field 1** *(SALEHIST.SLH_USER1)*
> **User Field 2** *(SALEHIST.SLH_USER2)*
> **User Field 3** *(SALEHIST.SLH_USER3)*
> **User Field 4** *(SALEHIST.SLH_USER4)*
> **User Field 5** *(SALEHIST.SLH_USER5)*
> **User Field 6** *(SALEHIST.SLH_USER6)*
> **User Field 7** *(SALEHIST.SLH_USER7)*

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Assessment History Screen

The Assessment History screen displays current appraised and assessed values, recalculation information, override values, and historical assessment data.

The first section on this screen is the parcel's recalculation information. There are six valuation approaches available. Valuation approaches enabled for the selected parcel to display a value, the date upon which the value was last calculated and the calculation status. A 'C' status indicates that the designated recalculation engine processed the parcel without error, while 'E' specifies the opposite.

	Value	Date	Status
Regression	$0		
Comparable Sales Final Value	$0	5/8/2019	C
Comp Apportionment	$0		
Total Apportionment	$0		
Income	$0		
Cost	$213,400	5/8/2019	C
Trend	$0		

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Regression – The Regression approach applies user-provided coefficients to parcel data characteristics determined to correlate with market value to arrive at a value.

    Value: *PARCEL.PRC_TTL_REGRESSION*

    Date: *PARCEL.PRC_TTL_REGRESSION_DATE*

    Status: *PARCEL.PRC_TTL_REGRESSION_STATUS*

Market Comp Sales – This application uses the Minkowski Similarity metric to determine comparable sales for parcels. This method transforms the measures of absolute difference for diverse variables into directly comparable numbers that can be added together into one metric. Parcels with the lowest scores are selected as comparables.

    Value: *PARCEL.PRC_COMP_FINAL*

    Date: *PARCEL.PRC_COMPS_DATE*

    Status: *PARCEL.PRC_COMPS_STATUS*

Comp Apportionment – The Comp Apportionment method is similar to the Straight Apportionment (or Total Apportionment) method. The Comp Apportionment method is used when there are not enough sales in a complex to use Straight Apportionment. Comparable Sales would be run on the Complex with inadequate sales, and then the system would use the apportionment method incorporating all of the sales from the subject and comparable complexes.

    Value: *PARCEL.PRC_TLL_COMP_APPORTN*

    Date: *PARCEL.PRC_COMP_APPORTN_DATE*

    Status: *PARCEL.PRC_COMP_APPORTN_STATUS*

Income – The Vision application has 3 different Income valuation systems available. The first system is the Economic Only approach which utilizes a gross income multiplier. The second system called Vision Classic utilizes a Direct Capitalization approach. The third system is called the Automated Rent Roll Based. The income approach is based on the concept that current value is the present worth of future benefits to be derived through income production by an asset over the remainder of its economic life. The income approach uses capitalization to convert the anticipated benefits of the ownership of property into an estimate of present value.

    Value: *PARCEL.PRC_TTL_INCOME*

    Date: *PARCEL.PRC_TTL_INCOME_DATE*

    Status: *PARCEL.PRC_TTL_INCOME_STATUS*

Cost – The cost approach is based on the principle of substitution. Insofar as a rational informed purchaser would pay no more for a property than the cost of building an acceptable substitute with like quality. The cost approach seeks to determine the replacement cost new of an improvement minus the depreciation adding the land value.

    Value: *PARCEL.PRC_TTL_COST*

    Date: *PARCEL.PRC_TTL_COST_DATE*

    Status: *PARCEL.PRC_TTL_COST_STATUS*

Trend – The Trending approach adjusts the values for the effects of time. Typically, trending is calculated based on the most recent sale prices. The trended price is intended to reflect the adjustments due to the effects of inflation, deflation and sometimes the demand of an area.

Value: *PARCEL.PRC_TREND_TOTAL*

Date: *PARCEL.PRC_TREND_DATE*

Status: *PARCEL.PRC_TREND_STATUS*

Marshal and Swift – The Marshall and Swift valuation approach uses the Vision Marshall & Swift MVP valuation engine. If enabled, the Vision application allows users to enter data in to the Marshall and Swift components screens which then sends the data to the Marshall and Swift service (if configured in table maintenance) to calculate a value based on the proprietary MVP calculation engine.

Value: *PARCEL.PRC_MVP_TOTAL*

Date: *PARCEL.PRC_ MVP_DATE*

Status: *PARCEL.PRC_MVP_STATUS*

The second section on this screen is the current value breakdown.

Selected Value	Appraised	Alt Land Values	Assessed
Total Appraised Bldg	$60,700.00	$60,700.00	$60,700.00
Total Appraised Extra Features	$24,000.00	$24,000.00	$24,000.00
Total Appraised Outbldg	$1,500.00	$1,500.00	$1,500.00
Total Appraised Land	$527,900.00	$200.00	$527,900.00
TotalValue	**$614,100.00**	**$86,400.00**	**$614,100.00**
Exemptions			**$0.00**
Net Parcel Value			**$614,100.00**
Primary Use	1010		

Total Bldg Value (Appraised) *(PARCEL.PRC_TTL_APPRAIS_BLDG)* – The Total Appraised Building value is the market value of the structure on the parcel. This value consists of an estimate of the value of a building before application of any fractional assessment ratio, partial exemptions or other adjustments.

Total Bldg Value (Assessed) *(PARCEL.PRC_TTL_ASSESS_BLDG)* – The Total Assessed Building value is the value of the structure on the parcel after fractional assessment ratios, partial exemptions, and any decisions to override the market value of the building. These assessed values are then provided to formulate tax policy in a jurisdiction.

*Total Bldg Value (Alt Land) – The Total Assessed Building value is the assessed value for the building. The Building value in the Alternate Land column is carried over from the Assessed Building field because the Alternate Land column's only varying value from the Assessed values is the Land Value.

Total Extra Feature Value (Appraised) *(PARCEL.PRC_TTL_APPRAIS_XF)* – The Total Appraised Extra Feature value is the sum of all Extra Feature appraised values for the parcel. An Automatic Teller Machine is an example of an Extra Feature.

Total Extra Feature Value (Assessed) *(PARCEL.PRC_TTL_ASSESS_XF)* – The Total Assessed Extra Feature value is the sum of all Extra Feature assessed values for the parcel. An Automatic Teller Machine is an example of an Extra Feature.

*Total Extra Feature Value (Alt Land) – The Total Assessed Extra Feature value is the sum of all Extra Feature assessed values for the parcel. An Automatic Teller Machine is an example of an Extra Feature. The Extra Feature value in the Alternate Land column is carried over from the Assessed Extra Feature

Value field because the Alternate Land column's only varying value from the Assessed values is the Land Value.

Total Outbldg Value (Appraised) *(PARCEL.PRC_TTL_APPRAIS_OB)* – The Total Appraised Outbuilding Value sums all of the Outbuildings entered on the parcel on the Outbuildings screen. A Shed or Barn are examples of Outbuildings.

Total Outbldg Value (Assessed) *(PARCEL.PRC_TTL_ASSESS_OB)* - The Total Assessed Outbuilding Value sums all of the Outbuildings entered on the parcel on the Outbuildings screen. A Shed or Barn are examples of Outbuildings.

*Total Outbldg Value (Alt Land) - The Total Assessed Outbuilding Value sums all of the Outbuildings entered on the parcel on the Outbuildings screen. A Shed or Barn is an example of an Outbuilding. The Outbuilding value in the Alternate Land column is carried over from the Assessed Outbuilding Value field because the Alternate Land column's only varying value from the Assessed values is the Land Value.

Total Land Value (Appraised) *(PARCEL.PRC_TTL_APPRAIS_LND)* - The Total Appraised Land Value sums all of the Land Line values entered on the parcel on the Classification and Land Information screen, which valued them against the Land Curve tables in table maintenance.

Total Land Value (Assessed) *(PARCEL.PRC_TTL_ASSESS_ LND)* – The Total Assessed Land Value sums all of the Land Line values entered on the parcel on the Classification and Land Information screen, which valued them against the Land Curve tables in table maintenance.

*Total Land Value (Alt Land) *(PARCEL.PRC_TTL_ASSESS_ LND_ALT)* – The Total Assessed Land Value sums all of the Land Line values entered on the parcel on the Alternate Land Pricing screen, which valued them against the corresponding tables in Table Maintenance.

Total Value *(PARCEL.PRC_TTL_APPRAIS)* – The Total Value field for the parcel is the sum of the building, extra features, outbuilding, and land appraised values.

Total Value *(PARCEL.PRC_TTL_ASSESS)* – The Total Value field for the parcel is the sum of the building, extra features, outbuilding, and land assessed values.

Total Alt Land Value *(PARCEL.PRC_TTL_ASSESS_ALT)* – The Total Value field for the parcel is the sum of the building, extra features, outbuilding, and alt land pricing land assessed values.

Exemptions *(PARCEL.PRC_TTL_EXEMPT)* – The Exemptions field will appear on this screen if users choose the setting in table maintenance called 'Apply Exemptions to Parcel Total'. This option will populate the exemptions field, and then subtract the Exemptions value from the Total Value to produce the Net Parcel Value.

Land Deferred *(PARCEL.PRC_TTL_APPRAIS_LND_DEF)* – The Land Deferred field will appear on this screen if users enable Alt Land Pricing. This option will display the difference between the market and alt land values.

Net Parcel Value *((PARCEL.PRC_TTL_ASSESS)–(PARCEL.PRC_TTL_EXEMPT))* – The Net Parcel Value is the Exemption Value subtracted from Total Value. This field will only populate if the option in table maintenance called *'Apply Exemptions to Parcel Total'* is enabled.

Primary Use *(PARCEL.PRC_PRIMARY_OCC)* – This Primary Use field is a 3 or 4 digit user-defined code and unique for each state. This code indicates the primary use of the parcel.

Value Source	C: Cost	▼

Value Source *(PARCEL.PRC_VALUE_SOURCE)* – The Value Source field displays the valuation approach chosen from permitted values defined in the Building – Recalculation Settings table. Depending on the recalculation settings users may see the following value source options: C – Cost, I – Income, M – Market Comps, O – Override, A – Comps Apportionment, P – Straight Apportionment, R – Regression, or V – Marshall Swift Cost.

The Override and Adjustment Sections allow users to enter information about either overrides or adjustments. These may apply to the parcel level, or individual component levels. Users can enter a specific override amount (in dollars) made to the assessed value of a parcel. Alternately, users may enter a specific adjustment factor used to modify the assessed value of a parcel.

Parcel Level Adjustment / Override

	Value	Type	Run	Date	ID	Comment
Override	$200,000.00	T	N	5/2/2012 11	TV	Owner is building an addition
Adjustment	0.25	T	N	5/2/2012 11	TV	Owner is building an addition

Override Value *(OVRADJ.OVR_VALUE where OVRADJ.OVR_CODE = PO)* – The Override Value is a dollar value of the override. The override amount entered here will replace the previous parcel value.

Override Type *(OVRADJ.OVR_TYPE where OVRADJ.OVR_CODE = PO)* – The Override Type is either Permanent or Temporary. Select one of these options from the drop down list.

Override Reason *(OVRADJ.OVR_REASON where OVRADJ.OVR_CODE = PO)* – The Override Reason code describes the reason the override was placed on the parcel. The Override Reason codes are user defined within Table Maintenance. To choose a code, select it from the drop down list.

Override Date *(OVRADJ.OVR_DATE where OVRADJ.OVR_CODE = PO)* – The Override Date is populated after users enter all of the data for the authorization of the Override.

Override ID *(OVRADJ.OVR_ID where OVRADJ.OVR_CODE = PO)* - The Override ID field contains a list of users Id's and names. Select the ID for the person authorizing the parcel override.

Override Comment *(OVRADJ.OVR_COMMENT where OVRADJ.OVR_CODE = PO)* – The Override Comment field contains any information necessary to summarize the purpose for the override.

Adjustment Value – *(OVRADJ.OVR_VALUE where OVRADJ.OVR_CODE = PA)* - The Adjustment Value field contains the adjustment factor for the parcel. This field must contain a number between .01 and 10 and can have a maximum of two decimal places.

Adjustment Type *(OVRADJ.OVR_TYPE where OVRADJ.OVR_CODE = PA)* - The Adjustment Type is either Permanent or Temporary. Select one of those options from the drop down list.

Adjustment Reason *(OVRADJ.OVR_REASON where OVRADJ.OVR_CODE = PA)* - The Adjustment Reason code describes the reason the adjustment was placed on the parcel. The Adjustment Reason codes are user defined within Table Maintenance. To choose a code, select it from the drop down list.

Adjustment Date *(OVRADJ.OVR_DATE where OVRADJ.OVR_CODE = PA)* - The Adjustment Date is populated after all of the data is entered for the authorization of the adjustment.

Adjustment ID *(OVRADJ.OVR_ID where OVRADJ.OVR_CODE = PA)* - The Adjustment ID field contains a list of users Id's and names. Select the ID for the person authorizing the parcel override.

Adjustment Comment *(OVRADJ.OVR_COMMENT where OVRADJ.OVR_CODE = PA)* – The Adjustment Comment field contains any information necessary to summarize the purpose for the override.

Component Level Adjustment / Override

Component Level overrides use the same fields as the parcel level adjustment / override. The difference is the OVR_CODE. The associated OVR_CODEs for each component level adjustment and override are listed below.

> **Building Override:** OVR_CODE = 'BO'
> **Building Adjustment:** OVR_CODE = 'BA'
>
> **Outbuilding Override:** OVR_CODE = 'OO'
> **Outbuilding Adjustment:** OVR_CODE = 'OA'
>
> **Land Override:** OVR_CODE = 'LO'
> **Land Adjustment:** OVR_CODE = 'LA'
>
> **Extra Feature Override:** OVR_CODE = 'EO'
> **Extra Feature Adjustment:** OVR_CODE = 'EA'

The Assessment History grid section will provide past assessment values for the building, extra features, outbuildings, and land provided that the Save Assessment Utility is run at the completion of finalizing parcel values.

Num *(AHDATE.AHD_SAVE_NUM)* – The Num field indicates the save number the line corresponds with in Vision. This number is sequenced automatically when the Save Assessment Utility is run in the town. Save number 0 is the current year's values and save number 1 is the most recent set of saved values.

Year *(AHDATE.AHD_FISCAL_YEAR)* – The Year field indicates the Fiscal Year of the Saved Values. The year is manually entered when users begin the Save Assessment Utility. Users must ensure users enter the correct year when saving assessment history. Custom programming is required to delete a save line from the Assessment history grid.

I/F *(AHDATE.AHD_FINAL_SAVE; -1 = Final, 0 = Interim)* – The I/F field stands for Interim or Final. During the Save Assessment Utility process the user is prompted by Vision to indicate whether this is a Final Year End save or an interim save for the year. If the save is an Interim save users will see an 'I', if it is a final save users will see an 'F'. There can only be one final save per tax cycle.

Date *(AHDATE.AHD_SAVE_DATE)* – The Date field indicates the day, month, and year the Save Assessment Utility was run in order to produce the new save line. This field is automatically populated when the Save Assessment Utility is run.

Class *(AHDATE.AHD_USE_TYPE)* – The Class field indicates the use type of the property. This category is typically configured in Table Maintenance.

Use *(AHDATE.AHD_USE_CODE)* – The Use field is a 3 or 4 digit user-defined code and unique for each state. This code indicates the final primary use of the parcel.

Building Value *(AHDATE.AHD_TTL_ASSESS_BLDG)* – The Building Value field in the Assessment History grid indicates the final Total Assessed Building for the parcel.

XF Value *(AHDATE.AHD_TTL_ASSESS_XF)* – The Extra Features Value field in the Assessment History grid indicates the final Total Extra Features value calculated for the parcel.

Outbuilding Value *(AHDATE.AHD_TTL_ASSESS_OB)* – The Outbuilding Value field in the Assessment History grid indicates the final Total Outbuilding value calculated for the parcel.

Improved Value *(AHDATE.AHD_TTL_ASSESS_IMPROVEMENTS)* - The Total Improvements Value field in the Assessment History grid indicates the final Total Improvements value (Building Value plus the Extra Feature Value and Outbuilding Value) calculated for the parcel.

Land Value *(AHDATE.AHD_TTL_ASSESS_LAND)* – The Land Value field in the Assessment History grid indicates the final Total Assessed Land value.

Total Value *(AHDATE.AHD_TTL_ASSESS)* – The Total Value field in the Assessment History grid indicates the final Total Assessed value for the parcel.

Exemptions *(AHDATE.AHD_TTL_EXEMPT)* – The Exemptions Value field in the Assessment History grid indicates the final Total Exemptions value calculated for the parcel.

Source *(AHDATE.AHD_VALUE_SOURCE)* – The Value Source field displays the valuation approach chosen at the time of the parcel save. The permitted values are defined in the Building – Recalculation Settings table. Depending on the recalculation settings users may see the following value source options: C – Cost, I – Income, M – Market Comps, O – Override, A – Comps Apportionment, P – Straight Apportionment, R – Regression, or V – Marshall Swift Cost.

Total Appraised Land Def *(AHDATE.AHD_TTL_APPRAIS_LND_DEF)* – The Land Deferred field stores the difference between market land valuation and approved alt land valuation.

The bottom half of this section allows users to edit some of the values in the grid above. If users select a line in the Assessment History Grid users will see the corresponding Appraised, Assessed, and Exemption values as well as the Type and Code fields. If users have a need to alter these values after running Save Assessment, users may do so manually in this bottom grid. To change the Assessment Values users are required to place a check in the 'Override Values' box, otherwise these values will be grayed out. The table and fields for these fields will be the same as those in the grid above.

The Last section on this page contains the Error Status of the parcel.

Error Status *(PARCEL.PRC_RECALC_ERR)* – The Error Status field indicates any recalculation errors preventing the parcel from properly calculating. An example error would indicate if a field that should be populated but is not, or a missing table configuration.

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Other Assessments Screen

Other Assessments, also known as **Special Assessments** or **Betterments**, are additional assessments added to a parcel. The assessment of betterments is typically a method used to recapture the cost of public improvements, which benefit a limited area, against the real estate situated within that area. An example of another assessment is a public sewer hookup. Although the owners of the real estate parcel are named in the assessment, they are not typically personally liable for payment of the assessment. In Vision this field is used to track the other assessments on the property. This information is not attributed to the total assessed value.

Other Assessments						
Code	Description	Num.	Year	Amount	Int.	
01	Sewer	1	2012	500.00		.30

Add Assessment	Delete Assessment				
Code		Number	Year	Amount	Interest
01: Sewer	▼	1	2012	500	.3

Code *(OTHERASS.OAS_CODE)* – The Code is the local code for the other assessment (betterment). This is jurisdictionally defined in table maintenance.

Description *(OTHERASS.OAS_DESC)* – The Description is the type of other assessment (betterment) defined while entering the code in table maintenance.

Number *(OTHERASS.OAS_NUMBER)* – The Number field is used to indicate the number of the other assessment.

Year *(OTHERASS.OAS_YR)* – The Year field is the effective year of the other assessment.

Amount *(OTHERASS.OAS_AMT)* – The Amount field stores the dollar amount of the other assessment

Interest *(OTHERASS.OAS_INTEREST)* – The Interest field contains the computed interest of the other assessment. This field needs to be entered in as a decimal.

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Exemptions Screen

Some jurisdictions may give property tax exemptions to certain property owners as defined by state law or local ordinance. An example of a personal exemption might be because the owner is a veteran, surviving spouse, or a senior citizen. Because Exemptions are applied based on the owner of the property, users can enable a setting that will notify users that there is an exemption on a parcel when users enter a new owner on that parcel.

Exemptions are subtracted from the assessed total value if the 'Apply Exemption to Parcel Total' option is checked in the General Table under Town Parameters. When users add exemptions to parcels for multiple years, ALL of the Exemptions are applied to the current year values.

Code *(EXEMPTS.EXE_CODE)* – The Code field is used to indicate the Personal Exemption awarded to the owner. This code will refresh the Type/Description field if the record is already in the grid.

Type/Description *(EXEMPTS.EXE_TYPE)* – The Type/Description field is the description of the code as defined in Table Maintenance. This is automatically populated upon entry of the code.

Year *(EXEMPTS.EXE_YR)* – The Year field is the effective year of the exemption.

Amount *(EXEMPTS.EXE_AMT)* – The Amount field is the dollar amount of the exemption. The values can be table driven while other values will vary based on the type of exemption.

Start Date *(EXEMPT.EXE_START_DATE)* – The Start Date field indicates when the Exemption is active. This is not a required field and is for informational purposes only.

End Date *(EXEMPT.EXE_END_DATE)* – The End Date field indicates when the Exemption becomes inactive. This is not a required field and is for informational purposes only.

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Supplemental Data Screen

The Supplemental Data screen contains user defined labels and data fields established based on the needs of the jurisdiction. These fields are configured in the Admin Application under Configuration of V8. If the user field configuration specifies a picklist for a given field, there will be an available drop down list for the field.

Parcel User Field 1 – 10 – Parcel User Fields contain user defined fields. In the image above, these fields are the top 10 fields on the left side of the screen. The associated Table and Field names for these fields are as follows:

Parcel User Field 1: *PARCEL.PRC_USRFLD_01*

Parcel User Field 2: *PARCEL.PRC_USRFLD_02*

Parcel User Field 3: *PARCEL.PRC_USRFLD_03*

Parcel User Field 4: *PARCEL.PRC_USRFLD_04*

Parcel User Field 5: *PARCEL.PRC_USRFLD_05*

Parcel User Field 6: *PARCEL.PRC_USRFLD_06*

Parcel User Field 7: *PARCEL.PRC_USRFLD_07*

Parcel User Field 8: *PARCEL.PRC_USRFLD_08*

Parcel User Field 9: *PARCEL.PRC_USRFLD_09*

Parcel User Field 10: *PARCEL.PRC_USRFLD_10*

GIS ID *(REALMAST.REM_GIS_ID)* – The GIS ID is the unique identifier used to link the parcel with the corresponding geographic shape file. This linking field will allow the GIS module to display the GIS layers with the corresponding parcel information.

Parcel Description *(PARCEL.PRC_DESCRIPTION)* – The Parcel Description field allows for a description of the parcel that contains up to 3500 characters.

Assessor ID *(PARCEL.PRC_ASSESSOR_ID)* – The Assessor ID field is used to select the Assessor whose task it is to update or value the current selected parcel.

Prior Assessor ID *(PARCEL.PRC_ASSESSOR_ID_PRIOR)* – The Prior Assessor ID field is used when the Assessor ID field is updated with a new assessor that will take responsibility for the data updates and valuation for this parcel. The previous assessor will move into the Prior Assessor ID field.

Secondary Area *(PARCEL.PRC_SECONDARY_AREA)* – The Secondary Area field is used to indicate the Assessor whose secondary jurisdictional zone includes the parcel currently selected. The Secondary Area field utilizes the same codes as the Current Assessor field.

Internet Suppression *(REALMAST.REM_INET_SUPPRESS; 1-when checked, 0-when unchecked)* – If users check the box for Suppress Internet Access this parcel will not display on Vision's Web Hosting.

Non-Disclosure *(REALMAST.REM_INTRNL_SUPPRESS; 1-when checked, 0-when unchecked)* – If users check the box for Legal Non-Disclosure on a parcel that parcel will either not display on reports or card prints of any kind, the Owner Names will be hidden or replaced with a generic name, Parcel Location Addresses will be hidden, or the Mailing Address will be hidden, depending on selected database settings for Non-Disclosure.

Work in Progress *(PARCEL.PRC_WORK_IN_PROGRESS; 1-when checked, 0-when unchecked)* – If users check the box for Work In Progress while working on a new parcel, then users are able to save the parcel without all of the required fields completed. This is a parcel specific flag. If this feature is employed, a Work in Progress report should be run regularly to ensure complete data entry. Additionally, these parcels will show on the recalculation error log after completion of a batch recalculation.

I/E Required *(PARCEL.PRC_IE_REQUIRED; 1-when checked, 0-when unchecked)* – If users check the box for Income and Expense Required, the user may run a report that displays those properties which require the mailing of an Income and Expense form.

X Coordinate *(PARCEL.PRC_X_COORD)* – The X Coordinate field is used in conjunction with the GIS module which allows users to zoom to X & Y Coordinates when entered. Users can also run Comparable Sales based off of Location utilizing the Coordinates. The X Coordinate should be entered in State Plain format.

Y Coordinate *(PARCEL.PRC_Y_COORD)* – The Y Coordinate field is used in conjunction with the GIS module which allows users to zoom to X & Y Coordinates when entered. Users can also run

Comparable Sales based off of Location utilizing the Coordinates. The Y Coordinate should be entered in State Plain format.

*In addition to the 10 standard user fields, the Supplemental Data screen also permits optional configuration of up to 100 additional user fields. These fields may be configured in the Admin Application under Configurations of Vision 8. These fields are found in the **PARCEL_EXTENSION** table, with field names **PRX_USRFLD_01** through **PRX_USRFLD_100**.

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Abatements Screen

The Abatements screen contains data pertaining to abatement requests from property owners. Abatement is an amount deducted (subtracted) from the assessed value. When a property owner believes that their assessed value is incorrect, they may request an assessment review in an Abatement process. The property owner first completes an Abatement Application, requesting a reduction in Parcel Assessment value. When an abatement application is processed, the Assessor's office has the option to record specific information regarding the process in Vision. The user should note that this section is used to track information only. Any changes in parcel assessment must be modified in the Valuation section of Vision.

Fiscal Year *(ABATEMENT.ABT_FISCAL_YR)* — The Fiscal Year field contains the appropriate fiscal year for the abatement. This is a four digit number field.

UseCode *(ABATEMENT.ABT_USE_CODE)* — The Use Code field contains a 3 or 4 digit code that is user-defined and specific to each jurisdiction. These codes are also called 'land use occupancy' codes, but not to be confused with building occupancy codes. Enter a Use Code to describe how the land is primarily used.

StatusCode *(ABATEMENT.ABT_STATUS & ABATEMENT.ABT_STATUS_DESC)* — The Status Code indicates the status of the abatement process. For example the code may indicate the Abatement is Pending, Settled, Withdrawn, or Denied. Permitted codes are defined in table maintenance.

AssessedValue *(ABATEMENT.ABT_ASSESS_VAL)* — The Assessed Value field is populated with the Assessed Value that the abatement is contesting. This value is entered showing dollars and cents ($xx.xx).

RequestedValue *(ABATEMENT.ABT_REQUEST_VAL)* — The Requested Value field is populated with the assessed value requested by the property owner. This value is entered showing dollars and cents ($xx.xx).

AbatedValue *(ABATEMENT.ABT_ABATED_VAL)* – In the Abated Value users enter the final assessed value determined through the abatement process. This value is entered showing dollars and cents ($xx.xx).

Initials *(ABATEMENT.ABT_INITIALS)* – The Initials field contains the individual who decided on the abatement.

Notes *(ABATEMENT.ABT_NOTES)* – The Note field is available for any relevant information about the process using a maximum of 80 characters.

BillNumber *(ABATEMENT.ABT_BILL_NUM)* – The Bill Number is the local number assigned to a property tax bill.

CertNumber *(ABATEMENT.ABT_CERT_NUM)* – The Cert Number is the Certificate number assigned.

Reason Code *(ABATEMENT.ABT_REASON & ABATEMENT.ABT_REASON_DESC)* – The Reason Code indicates the reason for the abatement application.

Tax Rate *(ABATEMENT.ABT_TAX_RATE)* – The Tax Rate is the rate of assessed property tax as determined by the jurisdiction.

TotalTax *(ABATEMENT.ABT_TTL_TAX)* – The Total Tax field contains the amount of assessed property tax. This amount can be either before or after abatement as defined by users. Enter showing dollars and cents ($xx.xx).

Abated Tax *(ABATEMENT.ABT_ABATED_TAX)* – The Abated Tax field contains the amount of property tax that reflects any change resulting from a request for abatement. This amount can be either the amount of tax after abatement or the amount by which the tax is reduced as a result of the abatement as defined by users. Enter showing dollars and cents ($xx.xx).

*ExtractDate *(ABATEMENT.ABT_EXTRACT_DATE)* – The Extract Date indicates the date that the abatement information was extracted for posting in the 3rd party billing and collection systems.

Payment Status *(ABATEMENT.ABT_PAYMNT_STATUS; 1-checked (paid), 0-unchecked (not paid))* – The Payment Status check box is used to indicate if the owner paid the original tax amount. In some jurisdictions, during the abatement process the owner can choose to either pay the original tax amount or wait until a decision is determined for the abatement. If the owner pays the original tax amount, they are refunded the difference if the abatement is granted. If the owner waits for the decision, they are required to pay the interest on the overdue tax amount if the abatement is not granted.

Important Dates Section:

Important Dates

Application Date	5/8/2019
Inspection Date	5/10/2019
Inspection Time	10:00 AM
Hearing Date	5/17/2019
Hearing Time	03:00 PM
Decision Date	5/31/2019
ATB Deadline	9/1/2019
Post Date	Select a date

ApplicationDate *(ABATEMENT.ABT_APP_DATE) – The Application Date indicates the date of the initial application for the abatement*

InspectionDate *(ABATEMENT.ABT_INSPECT_DATE)* – The Inspection Date indicates the date of any inspection performed to verify conditions related to the abatement.

Inspection Time *(ABATEMENT.ABT_INSPECT_TIME)* - The Inspection Time indicates the time of any inspection performed to verify conditions related to the abatement.

Hearing Date *(ABATEMENT.ABT_HEARING_DATE)* – The Hearing Date indicates the date of any hearing related to the abatement application.

Hearing Time *(ABATEMENT.ABT_HEARING_TIME)* – The Hearing Time indicates the time of any hearing related to the abatement application.

Decision Date *(ABATEMENT.ABT_DECISION_ DATE)* – The Decision Date indicates the date the decision on the abatement is made.

ATB Deadline *(ABATEMENT.ABT_ATB_DEADLINE)* – The Abatement Deadline is the last date any abatement can be processed.

PostDate *(ABATEMENT.ABT_POST_DATE)* – The Post Date indicates the date in which the Assessors are ready for posting the value to billing and collections.

Applicant Information Tab:

ApplicantName *(ABATEMENT.ABT_APPLICANT)* – The Applicant Name field is where users will enter the name of the abatement applicant.

ApplicantAddress 1 *(ABATEMENT.ABT_APP_ADDR1)* – The Applicant Address 1 field is generally used to record the street address for a person or property.

Applicant Address 2 *(ABATEMENT.ABT_APP_ADDR2)* – The Applicant Address 2 field is generally used to record any additional street address information for a person or property.

Applicant Address City *(ABATEMENT.ABT_APP_CITY)* – The Applicant Address City stores the name of the city for the person applying for the abatement.

Applicant Address State *(ABATEMENT.ABT_APP_STATE)* – The Applicant Address State stores the name of the state for the person applying for the abatement.

Applicant Address Zip *(ABATEMENT.ABT_APP_ZIP)* – The Applicant Address Zip is where users will enter the zip and/or postal code for the person applying for the abatement.

Applicant Phone Number *(ABATEMENT.ABT_APP_PHONE)* – The Applicant Address phone number is where users will enter the phone number for the person applying for the abatement.

Contact Information Tab:

Applicant	Contact
Contact Name	
Contact Address 1	
Contact Address 2	
Contact Address City	
Contact Address State	
Contact Address Zip	
Contact Phone Number	

Contact Name *(ABATEMENT.ABT_CONTACT)* – The Contact Name field is where users will enter the contact name for the abatement if it is different from the applicant name, for example an attorney.

Contact Address 1 *(ABATEMENT.ABT_CONT_ADDR1)* – The Contact Address 1 field is where users will enter the contact street address for the abatement if it is different from the applicant address 1.

Contact Address 2 *(ABATEMENT.ABT_CONT_ADDR2)* – The Contact Address 2 field is where users will enter any additional street address for the abatement if it is different from the applicant address 2.

Contact Address City *(ABATEMENT.ABT_CONT_CITY)* – The Contact Address City field is where users will enter the contact city for the abatement if it is different from the applicant city.

Contact Address State *(ABATEMENT.ABT_CONT_STATE)* – The Contact State field is where users will enter the contact state for the abatement if it is different from the applicant state.

Contact Address Zip *(ABATEMENT.ABT_CONT_ZIP)* – The Contact Zip field is where users will enter the contact zip and postal code for the abatement if it is different from the applicant zip.

Contact Phone Number *(ABATEMENT.ABT_CONT_PHONE)* - The Contact phone number is where users will enter the phone number for the person applying for the abatement.

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Assessment Change Maintenance Screen

The Assess Change Maintenance screen is used to track parcel changes. Vision automatically populates the Assess Change Maintenance section when any changes are made that affect the assessment and the Growth Mode tracking feature is active. In the table maintenance section, users can enable options to set Growth Mode on by default, or to only track value changes that occur on the parcel. If Growth Mode is not enabled, users can click the Add button to add a manual entry to the Assessment Change Maintenance grid.

Assessment Change Maintenance

FY	Change Date	User ID	Change Type	Description	Use Code	Improved Value	Land Value	Total Value	Difference	Acceptance Code	Desc	Comment	Extract

FY *(LA13.L13_FISCAL_YR)* – The FY field is the fiscal year of the value change. This is the same Fiscal Year set up in table maintenance.

Change Date *(LA13.L13_STATUS_DATE)* – The Change Date field indicates when the selected change occurred on the parcel.

User ID *(LA13.L13_USER)* –The User ID indicates which user made the selected change on the parcel.

Type *(LA13.L13_TYPE)* – The Change Type field indicates what type of change occurred on the parcel. For example, the Code could indicate if it was a Parcel Split, New Construction, Merge, or Other Adjustments. These codes can be set up in table maintenance in order to produce a drop down list.

Description (LA13.LA13_TYPE_DESC) – This Description field refers to the description of the Type Code and is set up at the same time as the Type Codes in table.

Use Code *(LA13.L13_USE_CODE)* – The Use Code field indicates the Primary Use Code of the parcel at the time of the change. If users make a land class change to the parcel, for example changing the parcel from a Single Family lot to a Vacant Residential Lot users need to complete additional steps. These additional steps result in having two distinct Assess Change lines that account for the value change to both land use codes.

Improved Value *(LA13.L13_TTL_ASSESS_IMP)* – The Improved Value field populates with the new improved value for the parcel.

Land Value *(LA13.L13_TTL_ASSESS_LND)* - The Land Value field populates with the new land value for the parcel.

Total Value *(LA13.L13_TTL_ASSESS)* - The Total Value field populates with the new total value for the parcel.

Difference *(LA13.L13_TTL_AMOUNT)* – The Difference field populates with the total difference in value on the parcel after the change.

Reason *(LA13.L13_ACCEPT_CODE)* - The Reason, or Acceptance Code, indicates if the Change is Accepted, Pending, Rejected, or some other jurisdictionally defined value. These codes can be set up in table maintenance in order to produce a drop down list. The Codes can be assigned to have Admin Rights, meaning that only users with the Admin Right to change the Acceptance code can do so.

Description *(LA13.L13_ACCEPT_CODE_DESC)* – The Description field refers to the description of the Acceptance Code this description automatically populates with the chosen Acceptance Code. These descriptions are set up at the same time as the Acceptance in table.

Comment *(LA13.L13_COMMENT)* - The Comment field is for any additional information users may provide about this value change. This field can hold up to 255 characters.

Extract (LA13.L13_EXTRACT) – Visual indication as to whether or not the change should be included in the LA13 extract process.

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Parcel Address Screen

This screen is used to create and maintain a complete list of primary and alternate addresses for a property. The first example is multiple legal mailing addresses for the parcel. When there is more than one building on a parcel that might have separate mailing addresses users can enter those address here. Another example is when a property may legally have one address, 10 Main Street, but they have always referred to the property as 43 Old Town Road. Having the alternate addresses allow for the user to search for other potential addresses to find the subject property.

Type *(ADDRESS.ADR_TYPE)* – The Type field typically consists of two options: P for Primary or S for Secondary. If the address is chosen as 'Primary' it is the principal address for the parcel. The Primary address should match the Parcel Location on the Account Information screen.

Number *(ADDRESS.ADR_NUM)* – The Number field indicates the street number of the parcel address.

Prefix *(ADDRESS.ADR_STR_PFX)* – The Prefix contains the descriptive word that comes before the street name that further describes the street, for example 'East' in 'East Main Street' would be the prefix. Depending upon the jurisdiction, users might enter prefixes as part of the street name.

Street *(ADDRESS.ADR_STREET)* – The Street field indicates the name of the street for the parcel address. The Street names can be configured in table maintenance to ensure consistent data entry.

Suffix *(ADDRESS.ADR_STR_SFX)* – The Suffix field contains the descriptive word that comes after the street name that furthers describes the street, for example 'West' in 'Main Street West' would be the suffix. Depending upon the jurisdiction, users might enter suffix as part of the street name.

Apartment *(ADDRESS.ADR_APT)* – The Apartment field indicates the apartment/unit number or letter of the parcel address.

City *(ADDRESS.ADR_CITY)* – The City field indicates the city where the parcel is located.

State *(ADDRESS.ADR_STT)* – The State field indicates the state where the parcel is located.

Zip *(ADDRESS.ADR_ZIP)* – The Zip field holds up to 12 characters to account for the 5 plus 4 digits US Postal Code.

Bldg *(ADDRESS.ADR_BLDG_NUM)* – The Bldg field indicates the building to which the address is associated.

Main *(ADDRESS.ADR_IS_PRIMARY; 1-checked, 0-unchecked)* – The Main field when checked indicates that the address selected is the main address for the building. When a main address is selected that address will print on the Property Record Card for that building. The buttons 'Clear All Primary Addresses' and 'Clear Primary Addresses for Bldg' will uncheck the main check box from either all addresses or all addresses for just the building of the line users have selected.

Additional Optional Fields (Note – not all fields are incorporated into the concatenated ADDRESS.ADR_LOCN field)

Address ID (ADDRESS.ADDRESS_ID) – Optional address identification number for jurisdiction specific tracking and linking.

Box Number (ADDRESS.BOX_NUMBER) – The Box Number field stores the optional PO Box number associated with the address.

Country (ADDRESS.ADR.COUNTRY) – The Country field indicates the Country in which the parcel is located.

County (ADDRESS.ADR_COUNTY) – The County field indicates the County in which the parcel is located.

Address Info (ADDRESS.ADR_ADDRESS_INFO) – The Address Info fields stores notes about the associated address.

Post Direction (ADDRESS.ADR_POST_DIRECTION) – The Post Direction field is similar to the Prefix field except it promotes picklist configuration for consistency.

Pre Direction (ADDRESS.ADR_PRE_DIRECTION) – The Pre Direction field is similar to the Suffix field except it promotes picklist configuration for consistency.

Street Type (ADDRESS.ADR_STREET_TYPE) – The Street Type field stores the type of street if it is not included in the Street field.

Unit Type (ADDRESS.ADR_UNIT_TYPE) – The Unit Type field stores the optional unit type, such as 'Apartment' or 'Unit'.

Number Prefix (ADDRESS.ADR_STREET_NUMBER_PREFIX) – The Number Prefix field stores street number prefix data if not consolidated in the Number field.

Number Suffix (ADDRESS.ADR_STREET_NUMBER_SUFFIX) – The Number Suffix field stores street number suffix data if not consolidated in the Number field.

LERTA Screen

The LERTA Exemption screen allows the user to define and view a LERTA exemption schedule. LERTA stands for Local Economic Revitalization Tax Assistance Law. Under the LERTA program, commercial property owners can receive a prorated ten year tax break on assessed valuation of the improvements to a deteriorated business property from property tax increase if they qualify.

Starting Amount *(LERTA.LRT_AMOUNT)* – The Starting amount is the starting value on which the LERTA exemption is calculated. The amount to be exempted from real estate taxes shall be limited to that portion of the additional assessment attributed to the actual cost of improvements in accordance with the exemption schedule.

Starting Year *(LERTA.LRT_YEAR)* – The Year field is the first year that the LERTA Exemption starts.

Number of Years *(LERTA.LRT_NUM_YEARS)* – The Number of Years field is the length of the exemption schedule. The length of the exemption shall not exceed ten years.

Type *(LERTA.LRT_TYPE)* – The Type field is used to specify the type for the exemption.

Year # % – The Year Percentages fields are used to specify the percentage of the exemption that is based on the starting value for each year of the exemption. The exemption amount is calculated based on the percentage along with the year for the exemption. The associated Table and Field names for these fields are as follows:

Year 1 %: LERTA.LRT_PCT_YEAR1

Year 2 %: LERTA.LRT_PCT_YEAR2

Year 3 %: LERTA.LRT_PCT_YEAR3

Year 4 %: LERTA.LRT_PCT_YEAR4

Year 5 %: LERTA.LRT_PCT_YEAR5

Year 6 %: LERTA.LRT_PCT_YEAR6

Year 7 %: LERTA.LRT_PCT_YEAR7

Year 8 %: LERTA.LRT_PCT_YEAR8

Year 9 %: LERTA.LRT_PCT_YEAR9

Year 10 %: LERTA.LRT_PCT_YEAR10

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Associated Parcels Screen

The Associated Parcel screen displays information about each associated parcel. Associated parcels are used to combine two or more parcels that form a single economic unit. Typically, these are adjacent or nearby parcels owned by the same owner. One example is a shopping center with an additional parking garage across the street. Rather than value the two parcels separately, users can value them together on the primary parcel and then divide the total value into each parcel. All valuation is done on the land and construction information for the primary parcel and then distributed to any associated parcel(s) based on their individual percent of legal area contribution.

Associated Parcels

Parcel ID	State	Use	Legal Area	% Total	Land Value	Total Value	
4	1010			50.00	$305,300.00	$650,300.00	

Total Percentage: 50.00 %
Total Area: SF
Total Value: 650300 $

Parcel ID *(REALMAST.REM_ASSOC_PARCEL_ID)* – The Parcel ID field indicates the PID of the associated parcels.

State *(REALMAST.REM_USE_CODE)* – The State field indicates the Primary State Use code for the parcel.

Use *(REALMAST.REM_USE_TYPE)* – The Use field indicates the Use Type of the parcel as defined in Table Maintenance.

Legal Area *(REALMAST.REM_LEGAL_AREA)* – The Legal Area field shows the different amounts of the total legal area that each parcel contains.

% Total *(REALMAST.REM_ASSOC_PCT)* – The % Total field shows the percentage of the total legal area that each associated parcel contains.

Land Value *(PARCEL.PRC_TTL_ASSESS_LND)* – The Land Value shows the land value as determined by the associated parcels.

Total Value *(PARCEL.PRC_TTL_ASSESS)* – The Total Value shows the total value as determined by the associated parcels.

Total Percentage *(SUM(REALMAST.REM_ASSOC_PCT))* – The Total Percentage field indicates the total percentage of all of the associated parcels. If this number does not equal 100% the link for an associated parcel might be missing.

Total Area *(SUM(REALMAST.REM_LEGAL_AREA))* – The Total Area field indicates the summed total area for all associated parcels.

Total Value *(SUM(PARCEL.PRC_TTL_ASSESS))* – The Total Value field indicates the combined Total Assessed Value of the associated parcels.

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Notice History Screen

The optional Notice History screen is used to track correspondence with property owners. One type of notice that might be recorded here would be an "Impact Notice." An Impact Notice would be mailed to the property owner indicating the new valuation on the property. Other batch mailings or individual phone calls may also we recorded on this screen.

Fiscal Year *(NOTICEHIST.NOH_FISCAL_YR)* – The Fiscal Year field contains the inputted fiscal year of which the Notice History applies.

Notice Date *(NOTICEHIST.NOH_NOTICE_DATE)* – The Notice Date is the date in which the notice was sent out of the Assessor's office.

Notice Code *(NOTICEHIST.NOH_NOTICE_CODE)* – The Notice Code field is entered to track the description of the notice that was sent. The Code could be something similar to General Correspondence, Data Mailer, or Revaluation Letter. These codes are set by each individual jurisdiction and are configured in table maintenance.

Notice Code Description *(NOTICEHIST.NOH_NOTICE_CODE_DESC)* – This Description field refers to the description of the Notice Code and is set up at the same time as the Notice Codes in table.

Notice Type *(NOTICEHIST.NOH_NOTICE_TYPE)* – The Notice Type field indicates the type of notice that was sent. The Type could be a correspondence via Bulk Mail, Email, Fax, or Phone Call. These codes are set by each individual jurisdiction and are configured in table maintenance.

Notice Type Description *(NOTICEHIST.NOH_NOTICE_TYPE_DESC)* – This Description field refers to the description of the Notice Type and is set up at the same time as the Notice Type codes in table.

Response Date *(NOTICEHIST.NOH_RSPNS_DATE)* – The Response Date is the date in which a response from the property owner is received.

Response Code *(NOTICEHIST.NOH_RSPNS_CODE)* – The Response Code is the code that indicates how the property owner replied to the notice. Examples of response codes include: No Reply, Returned Email, or Returned Form. These codes are set by each individual jurisdiction and are configured in table maintenance.

Initials *(NOTICEHIST.NOH_INITIALS)* – The Initials field shows by whom the notice was generated. These codes are set by each individual jurisdiction and are configured in table maintenance.

Status *(NOTICEHIST.NOH_STATUS)* – The Status field notes the status of the Notice. This field can change whether the Assessor's office received a response from the property owner. These codes are set by each individual jurisdiction and are configured in table maintenance.

Comments *(NOTICEHIST.NOH_COMMENTS)* – The Comments field holds additional comments about the notice. This field holds up to 255 characters.

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Property Notes Screen

The Property Notes screen is a parcel-level screen that allows users to track year and category based parcel level notes. The note text in this section are limited to 2000 characters per record to prevent unmanaged database growth. The property notes screen features a table driven type code and column header sorting. The notes grid will also contain a Date Create column that will track the date the note was originally entered into Vision.

Type *(NOTES.NOT_TYPE)* – The Type field is where users enter the code for the type or category of note that users are entering. The drop down list will have types that have been configured in table maintenance.

Desc *(NOTES.NOT_DESC)* – The Type Description field is where the description for the type code resides. This field is automatically populated when users choose the type of note for the parcel. This field is also configured in table maintenance.

Year *(NOTES.NOT_YEAR)* – The Year field contains the current fiscal year for the note. This field is automatically populated by the year that is in the fiscal year field in table maintenance. Users can override this field if users need to enter a note for a previous year.

Note *(NOTES.NOT_TEXT)* – The Note field contains users' actual text notes. This field is 2000 characters long.

Created *(NOTES.NOT_DATE_CREATED)* – The Created field is automatically populated in the grid when the new note is added.

Private *(NOTES.NOT_PRIVATE)* – Private notes do not print on the card and are only viewed in the application by users belonging to groups permitted to view private notes.

Parcel Audit Screen

The Parcel Audit screen allows the user to view parcel changes specific to the selected parcel. In the Parcel Audit users can see all of the changes that have occurred on the parcel by sorting by User Id, Date/Time, Table name, Field name, or Description of the action. If properly configured, users may also view a subset of changes by checking the box for Basic Auditing.

User ID *(USRAUDIT.AUD_USER_ID)* – The User Id column contains the ID of the User that made the specific change to the parcel. For Example, if MOLLY is logged in and adds an outbuilding to a parcel, user would see her User ID, MOLLY, next to the change.

Date/Time *(USRAUDIT.AUD_DATE_TIME)* – The Date/Time column indicates when the change occurred on the parcel.

Table *(USRAUDIT.AUD_TABLE)* – The Table column indicates the table affected by the change to the parcel.

Field *(USRAUDIT.AUD_FIELD)* – The Field column contains the field name affected by the change to the parcel.

Description *(USRAUDIT.AUD_DESC)* – The Description column gives a detailed description of the change that occurred. For example, if an Address entry was inserted on to the parcel users will see one line of

description explaining the different changes that were involved with that update. If the full text does not display in the grid, the user may double click the line for display of the full text.
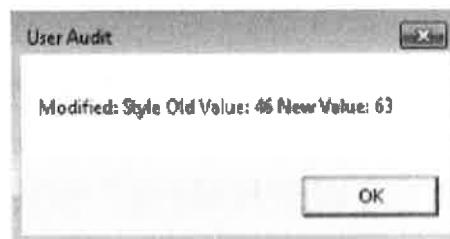
User Audit	☒
Modified: Style Old Value: 46 New Value: 63	
	OK

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Sub-Division History Screen

The Sub-Division History screen is divided into three sections. The top section is the Parent Parcel. The Parent Parcel is the parcel from which the sibling and child parcels were created. An example of this is if users have a large area of undeveloped land which a developer wishes to split into 16 single family lots. Those 16 single family lots would each be child parcels to the original lot. Then, if users select one of the newly created lots the other 15 lots will display as the Sibling Parcels of that selected parcel.

Sub-Division History

Parent Parcel

Pid	Line	Date Copied	MBLU	Account Number	Parcel Location	Use	Assessed Value
123	1	5/8/2012 10:52AM	03A/ 44A/ 13 //	R00134	1 CORNWELL ST	1010	117320

Sibling Parcels

Pid	Owner Name	MBLU	Account Number	Parcel Location
124	JOHN SMITH	03A/ 44A/ 13 / 1/	R00134	1 CORNWELL ST
125	MARY JONES	03A/ 44A/ 13 / 2/	R00135	2 CORNWELL ST

Child Parcels Created

Pid	Batch #	Owner Name	MBLU	Account Number	Parcel Location
126	1	EMILY CARTER	03A/ 44A/ 13 / A/	R00136	3 CORNWELL ST
127	1	BOB MILLER	03A/ 44A/ 13 / B/	R00137	4 CORNWELL ST
128	2	TRACY SKY	03A/ 44A/ 13 / C/	R00138	5 CORNWELL ST

The first section on this screen is the Parent Parcel information.

Parent Parcel							
Pid	Line	Date Copied	MBLU	Account Number	Parcel Location	Use	Assessed Value
123	1	5/8/2012 10:52AM	03A/ 44A/ 13 //	R00134	1 CORNWELL ST	1010	117320

PID *(PSMASTER.PSM_MASTER_PID)* – The PID field under the Parent Parcel section shows the PID, (Parcel ID) for the Parent Parcel from which the child parcels were created.

Line *(PSMASTER.PSM_LINE_NUM)* – The Line field indicates the line number for this entry.

Date Copied *(PSMASTER.PSM_STATUS_DATE)* – The Date Copied field indicates the date that the child parcels were copied from the master parcel.

MBLU – The MBLU field is a concatenated view of the individual MBLU fields for the master parcel at the time of creating the child parcels. The associated Table and Field names for these fields are as follows:

Map: *PSMASTER.PSM_MBLU_MAP*

Map Cut: *PSMASTER.PSM_MBLU_MAP_CUT*

Block: *PSMASTER.PSM_MBLU_ BLOCK*

Block Cut: *PSMASTER.PSM_MBLU_ BLOCK _CUT*

Lot: *PSMASTER.PSM_MBLU_LOT*

Lot Cut: *PSMASTER.PSM_MBLU_LOT _CUT*

Unit: *PSMASTER.PSM_MBLU_UNIT*

Unit Cut: *PSMASTER.PSM_MBLU_UNIT _CUT*

Account Number *(PSMASTER.PSM_ACCT_NUM)* – The Account Number indicates the account number of the master parcel at the time of creating the child parcels.

Parcel Location *(PSMASTER.PSM_PRCL_LOCN)* – The Parcel Location indicates the location of the master parcel at the time of creating the child parcels.

Use *(PSMASTER.PSM_USE_CODE)* – The Use indicates the primary use code of the master parcel at the time of creating the child parcels.

Assessed Value *(PSMASTER.PSM_TTL_ASSESS)* – Assessed Value field indicates the total assessed value of the master parcel at the time of creating the child parcels.

The second section on this screen is the Sibling Parcel information.

Pid	Owner Name	MBLU	Account Number	Parcel Location
124	JOHN SMITH	03A/ 44A/ 13 / 1/	R00134	1 CORNWELL ST
125	MARY JONES	03A/ 44A/ 13 / 2/	R00135	2 CORNWELL ST

PID *(PSCHILD.PSC_CHILD_PID)* – The PID field under the Sibling Parcel section shows the PID, (Parcel ID) for any Sibling Parcel(s) created in the same batch as the subject parcel.

Owner Name *(PSCHILD.PSC_OWN_NAME)* – The Owner Name indicates the owner name of the sibling parcels at the time of creating the Sub-Divided parcels.

MBLU – The MBLU field is a concatenated view of the individual MBLU fields for the sibling parcels at the time of creating the Sub-Divided parcels. The associated Table and Field names for these fields are as follows:

Map: *PSCHILD.PSC_MBLU_MAP*

Map Cut: *PSCHILD.PSC_MBLU_MAP_CUT*

Block: *PSCHILD.PSC_MBLU_ BLOCK*

Block Cut: *PSCHILD.PSC_MBLU_ BLOCK _CUT*

Lot: *PSCHILD.PSC_MBLU_LOT*

Lot Cut: *PSCHILD.PSC_MBLU_LOT _CUT*

Unit: *PSCHILD.PSC_MBLU_UNIT*

Unit Cut: *PSCHILD.PSC_MBLU_UNIT _CUT*

Account Number *(PSCHILD.PSC_ACCT_NUM)* – The Account Number indicates the account number of the sibling parcels at the time of creating the Sub-Divided parcels.

Parcel Location *(PSCHILD.PSC_PRCL_LOCN)* – The Parcel Location indicates the location of the sibling parcel at the time of creating the Sub-Divided parcels.

The third section on this screen is the Child Parcel information.

Child Parcels Created

Pid	Batch #	Owner Name	MBLU	Account Number	Parcel Location
126	1	EMILY CARTER	03A/ 44A/ 13 / A/	R00136	3 CORNWELL ST
127	1	BOB MILLER	03A/ 44A/ 13 / B/	R00137	4 CORNWELL ST
128	2	TRACY SKY	03A/ 44A/ 13 / C/	R00138	5 CORNWELL ST

PID *(PSCHILD.PSC_CHILD_PID)* – The PID field under the Child Parcel section will show the PID (Parcel ID) for the Child Parcels.

Batch # *(PSCHILD.PSC_LINE_NUM)* – The Batch # field indicates which batch, or group, to which the child parcel belongs. When using the Sub Division Wizard to create child parcels from the parent parcel all of the parcels will have the same batch number. If users choose to make additional parcels from the same master parcel all of those parcels will have a new batch number.

Owner Name *(PSCHILD.PSC_OWN_NAME)* – The Owner Name indicates the current owner name of the child parcels at the time of creating the Sub-Divided parcels.

MBLU - The MBLU field is a concatenated view of the individual MBLU fields for the child parcels at the time of creating the Sub-Divided parcels. The associated Table and Field names for these fields are as follows:

   Map: *PSCHILD.PSC_MBLU_MAP*

   Map Cut: *PSCHILD.PSC_MBLU_MAP_CUT*

   Block: *PSCHILD.PSC_MBLU_ BLOCK*

   Block Cut: *PSCHILD.PSC_MBLU_ BLOCK _CUT*

   Lot: *PSCHILD.PSC_MBLU_LOT*

   Lot Cut: *PSCHILD.PSC_MBLU_LOT _CUT*

   Unit: *PSCHILD.PSC_MBLU_UNIT*

   Unit Cut: *PSCHILD.PSC_MBLU_UNIT _CUT*

Account Number *(PSCHILD.PSC_ACCT_NUM)* – The account number under the Child Parcel section displays the account number for the child parcels at the time of creating the Sub-Divided parcels.

Parcel Location *(PSCHILD.PSC_PRCL_LOCN)* – The Parcel Location indicates the legal location the child parcels at the time of creating the Sub-Divided parcels.

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How to Log Into Vision

The purpose of this document is to assist the user in logging into the Vision 8 application.

1. Double click the Vision icon ![icon] on your desktop to display the **Connect To** data source dialog box.

2. Click the drop down arrow and select the appropriate database environment.

3. Click the drop down arrow and select the database name you wish to log into.

4. Press **<Tab>** or click in the User ID field and type your assigned **User Name/ID**.

5. Press **<Tab>** or click in the Password field and type your Password.
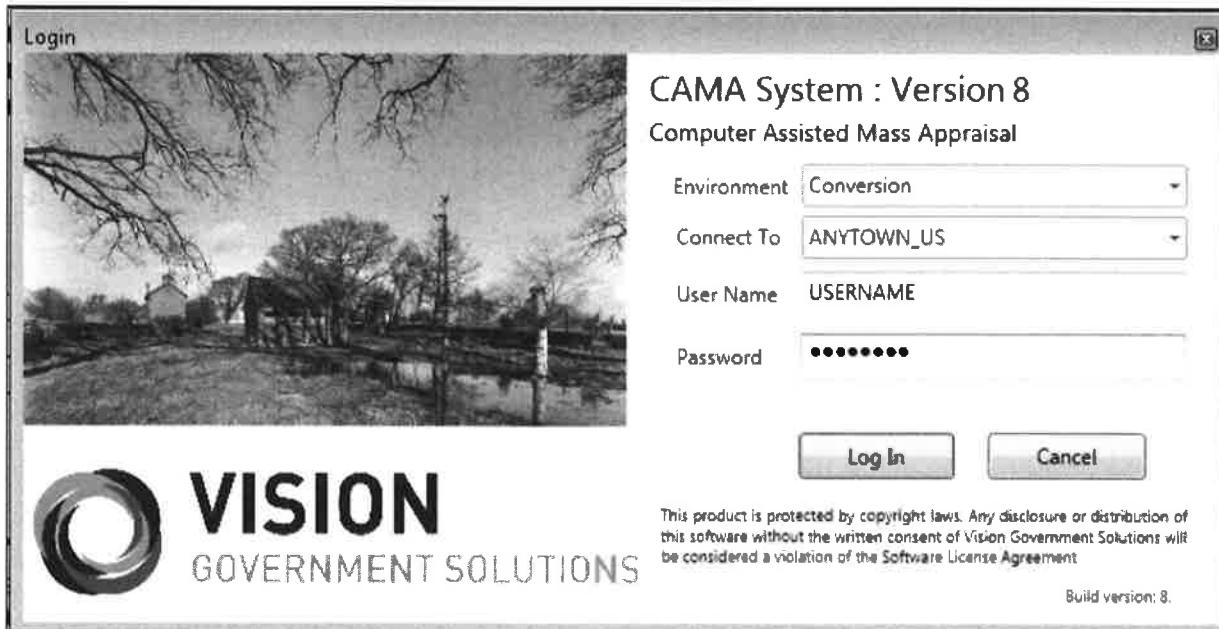
5. Press **<Enter>** or click **Log In** to display the Appraisal Vision Parcel Search screen.

6. At this point, the **Search** engine will appear. For more information on using parcel search, please see the **How to Search** document.

Parcel Search Criteria

Primary Searches | Secondary Searches | Street Listing

MBLU

[ ] [ ] [ ] [ ] [ ] [Select]

Vision Id

[ ] [Select]

Property Location

Str # [ ] Street Name [ ] [▾] # [ ] [ ] Search Alternate Addresses [Select]

Owner Name

[ ] ☑ Only Search Current **And** Future Owners [Select]

Account Number

[ ] [Select]

Back To List | Query

🔔 User ID and Password are case-sensitive – you need to pay attention to upper- and lowercase letters when you enter them.

If you get an error message, clear out the incorrect user name and password and re-enter. Try using all Uppercase or some combination of Upper- and lowercase letters. If that fails, contact your System Administrator.

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Modes of Operation

The purpose of this document is to explain how to switch between the various modes of the Vision 8 application.

The Enterprise Vision system can operate in any one of the following modes:

- Real Estate
- Sales Analysis
- Comp Sales Snapshots
- Personal Property

You can change modes at any time by selecting the desired mode on the **File menu**. First, click File on the top left of the screen and select the desired mode from the list.
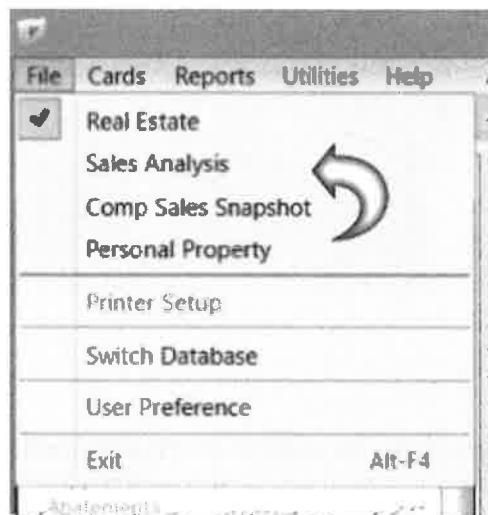
Real Estate

By default, Vision 8 always starts in Real Estate mode. In this mode, the **Parcel Information** section contains the screens that provide detailed information about the land, buildings, and assessment activity related to a parcel.

Sales Analysis

In the Sales Analysis mode, the system operates using a database of **sales data extracted** from the data used in the Real Estate mode. While in the **Sales Analysis** mode you will see this indicated at the top of your screen in red text that says "Sales Analysis".
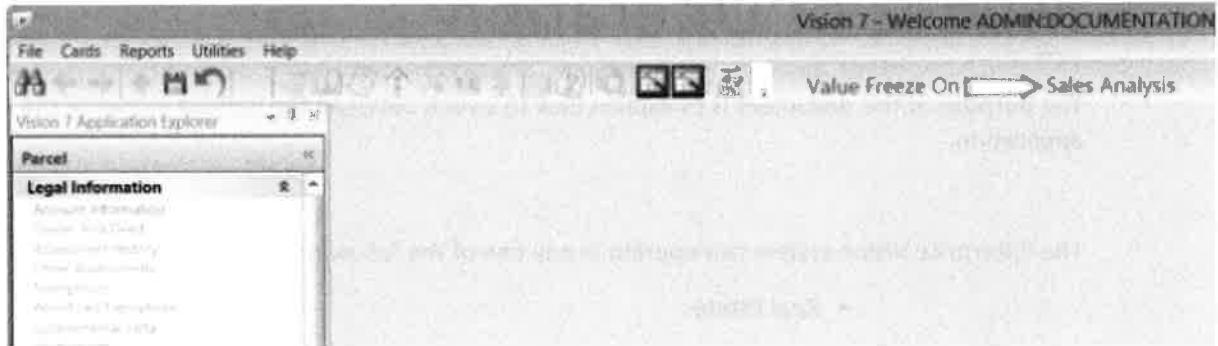
Comp Sales Snapshot

The Comp Sales Snapshot mode is used by **comparable sales routine**. While in the **Comp Sales Snapshot** mode you will see this indicated at the top of your screen in red text that says "Comp Sales Snapshot".
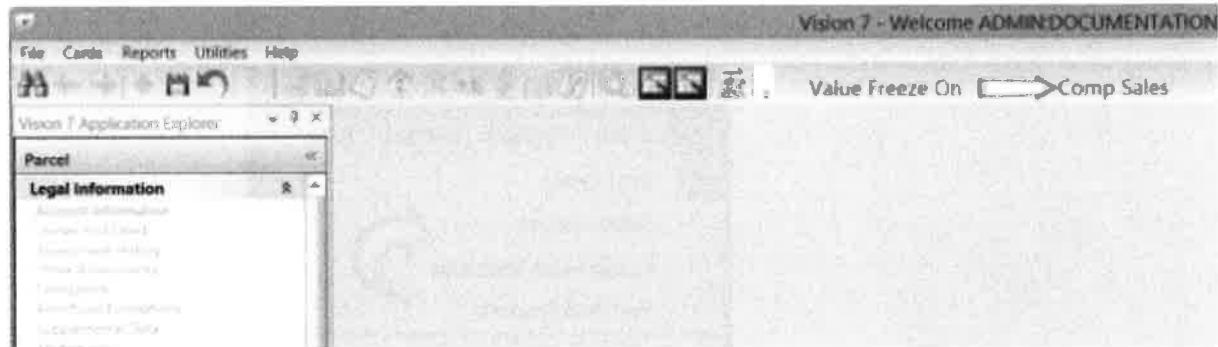
Personal Property

In the Personal Property mode, the Account Information section contains screens that provide legal and assessment information about each **personal property account**.

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System Tool Bar

This document will familiarize the user with the icons & functionality of the System Tool Bar in Vision 8. The System Tool Bar, located at the top of the application window, provides quick access to frequently used features in Vision 8.

Previous Year | 2018 ▾

The functionality of each button is as follows:

Search — This button will bring up the **Parcel Search Criteria** window.

Previous Parcel — This button will step you back to previous parcels you worked on in order of most recent.

Next Parcel — This button will step you forward through parcels you were working on but used the **Previous Parcel** button to leave.

Add New — This button will bring up the **New Parcel** window.

Save Changes — This button will immediately save any changes you have made in the current parcel.

Rollback Changes — This button will undo unsaved changes you have made to the state they were in when last saved.

Print — This button will print the current record

Recalculation — This button will recalculate the current parcel.

Legal Information — This button will bring you to the **Account Info** portion of the current parcels **Legal Information** section.

Classification Land Information — This button will bring you to the **Classification & Land Information** portion of the current parcels **Classification & Land Information** section.

Building Information — This button will bring you to the **Construction Details** portion of the current parcels **Building Information** section.

Sketch Tool — This button will bring you to the **Sketch** portion of the current parcels **Building Information** section.

Photos — This button will bring you to the **Photos** portion of the current parcels **Building Information** section.

Income Valuation — This button will bring you to the **Economic Income Valuation** portion of the current parcels **Income Valuation** section. If **Economic Income Valuation** information does not exist for the current parcel, it will instead bring you to the **Account Maintenance** portion of the current parcels **Income Valuation** section so that that information can be entered.

Associated Documents — This button will bring you to the **Associated Documents** portion of the current parcels **Associated Documents** section.

Dashboard - This button will bring you to the **Dashboard** portion of the current parcels **Summary Review Screen** section.

GIS — This button will bring you to the **GIS** portion of the current parcels **GIS** section.

Table Maintenance — This button will bring you to the **Table Maintenance** interface for your current database.

Cost Modeling — This button will bring you to the **Cost Modeling** interface for your current database.

Reports — This button will bring you to the **Reports** interface for your current database.

Report Wizard — This button will launch the **Reports Wizard** in the **Reports** interface for your current database.

Cost Report — This button will display the **Cost Report** for the current parcel.

Land Report — This button will display the **Land Report** for the current parcel.

Previous Search — This button will step you back to previous parcels in the search results.

Next Search — This button will advance you to the next parcel in the search results

You can change to a previous years by clicking the down-arrow of the **Previous Year** selection drop-down menu.

Previous Year 2019 ▾

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How to Search

This document will walk the user through the basic search functionality of Vision 8.

Clicking the **Binoculars** icon will bring up the **Parcel Search Criteria** window. This window provides the most common methods of searching for a parcel.
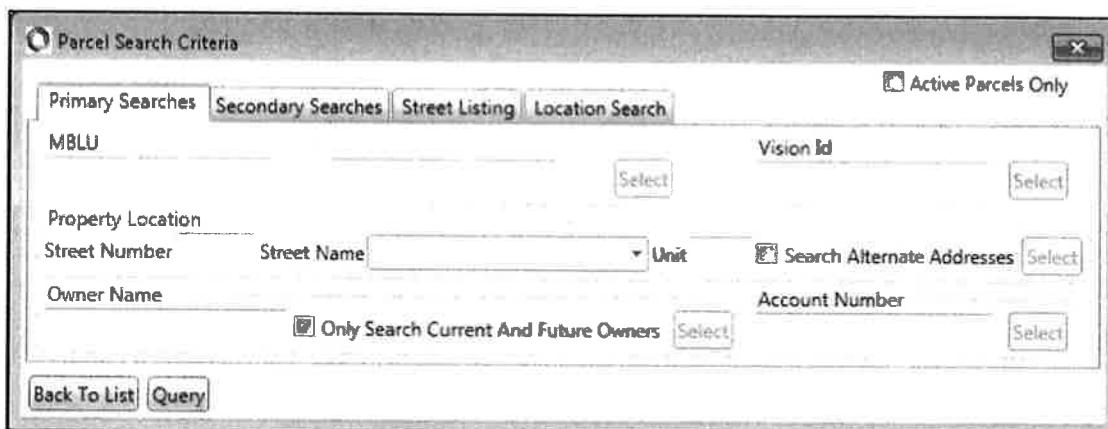
Primary Searches

Search by MBLU

To Search by **MBLU**, enter the Map, Map Cut, Block, Block Cut, Lot, Lot Cut, Unit and Unit Cut (*note: you do not need to enter values for all fields*), then press the **Enter** key or click the **Select** button in the **MBLU** box.
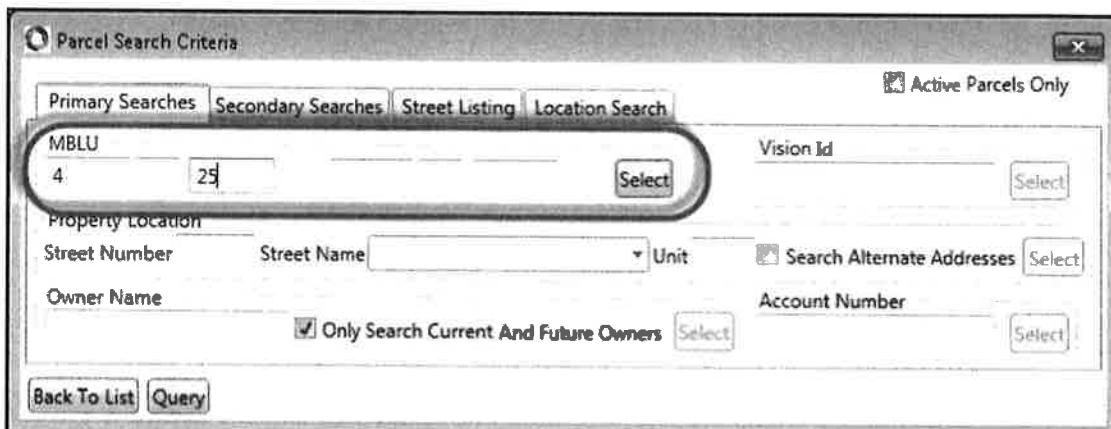
Search by Property Location

To search by **Property Location**, enter the values for street number and name, then press the **Enter** key or click the **Select** button in the **Property Location** box.
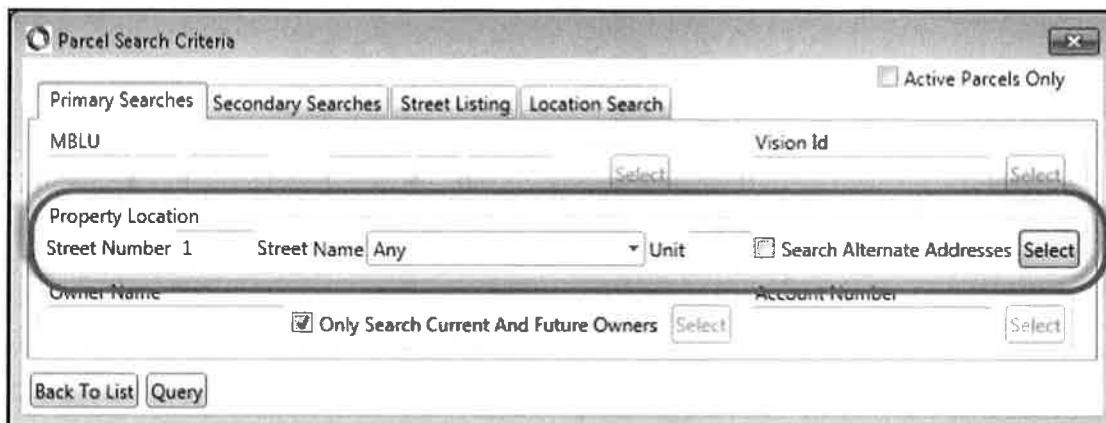
Checking off the **Search Alternate Addresses** checkbox will allow you to search for all addresses associated with a parcel rather than specifically the primary address.
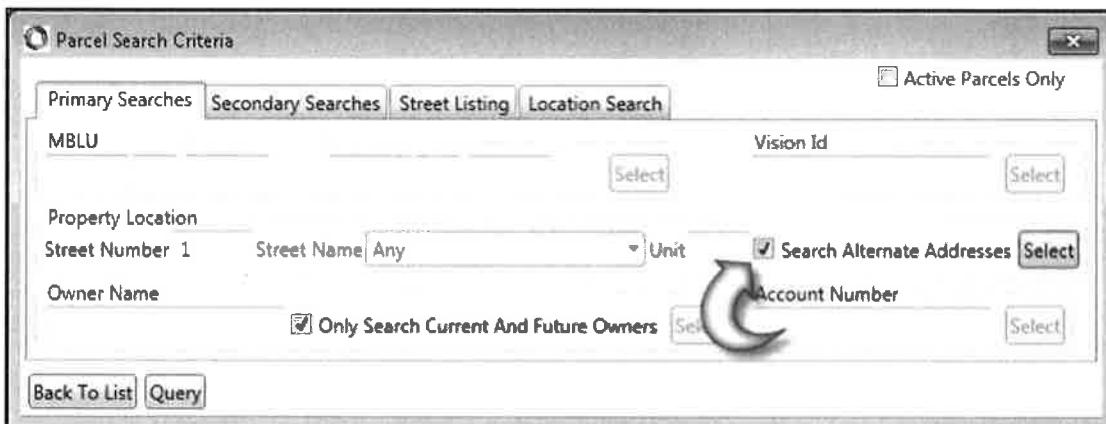
Search by Owner Name

To Search by the **Owner Name**, enter the name, then press the **Enter** key or click the **Select** button in the **Owner Name** box.
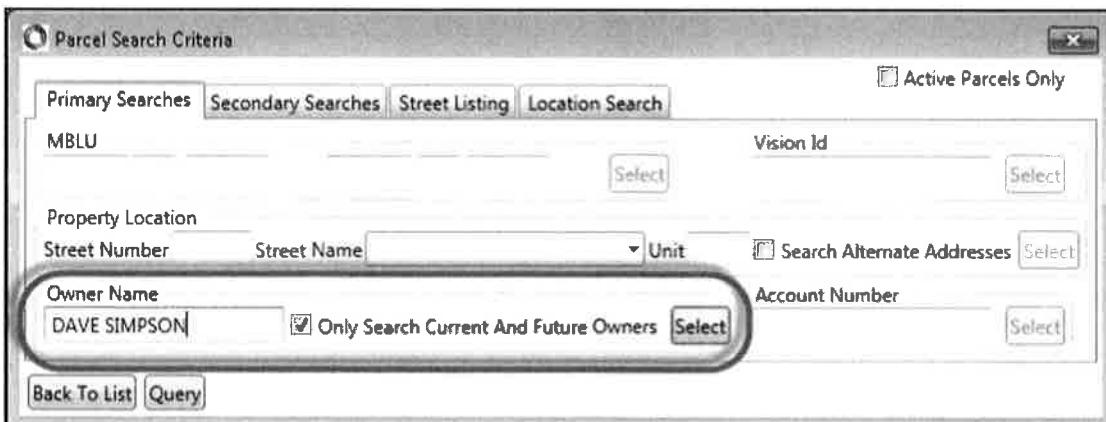
To include previous ownership history in your search, uncheck the **Only Search Current and Future Owners** checkbox.

Search by Vision ID

To Search for a parcel by **Vision ID (PID)**, enter a Vision ID, then press the **Enter** key or click the **Select** button in the **Vision Id** box.
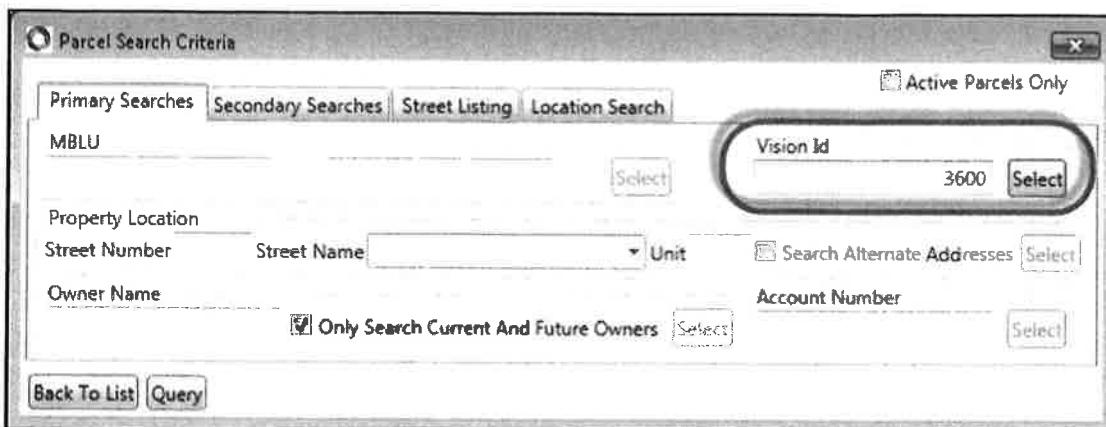
Search by Account Number

To Search for a parcel by **Account Number**, enter an Account Number, then press the **Enter** key or click the **Select** button in the **Account Number** box.
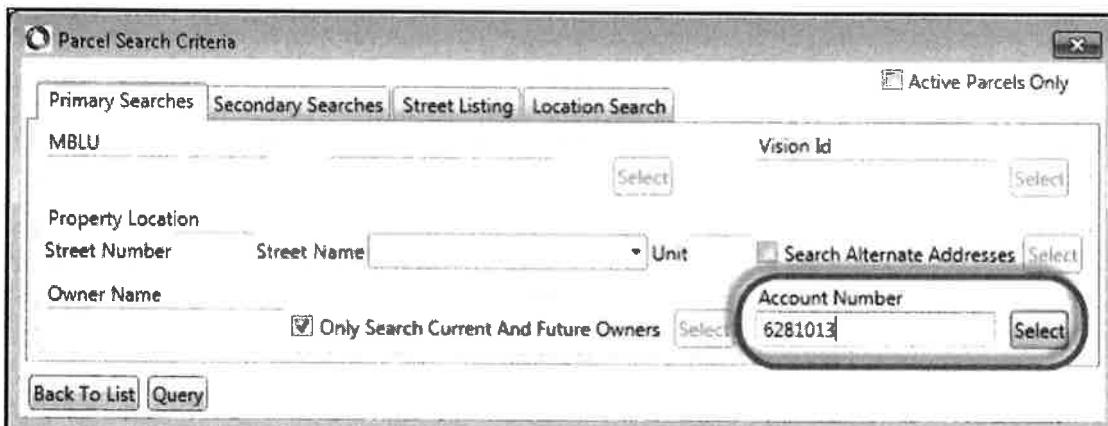
Persistent Search Results

1. If an exact match is not found, the nearest search results will populate at the bottom of the screen.
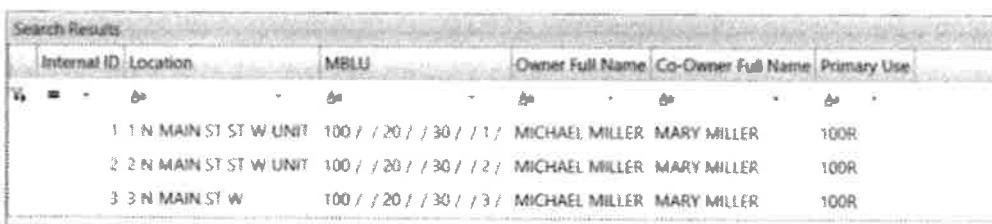
2. Search results may be filtered by clicking in one of the filter fields and typing the filter criteria. In this example the **Owner Full Name** column has been filtered by all last names that begin with "M".

3. You can also customize the filter by clicking on one of the filter buttons located just below each column heading.

4. There are 16 Custom filter options. These options are explained below.
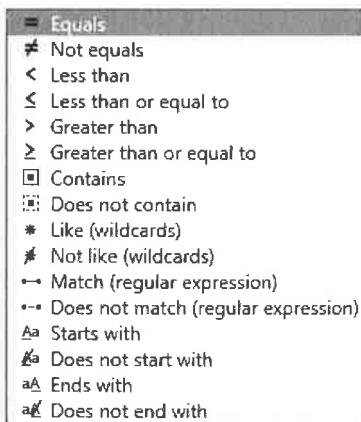
a. **Equals** – This filter will return results that are the same in amount or otherwise identical to the criteria. For example, the criteria "JOHN" for **Owner Full Name** would not return the results for **Owner Full Name** "JOHN S SMITH" because they are not exactly identical.

b. **Not equals** – This filter will return results that are not the same in amount or otherwise identical to the criteria. For example, the criteria "100R" for **Primary Use** would return results such as 410C and 100U but not 100R.

c. **Less than** – This filter will return results that are numerically smaller than the criteria. For example, the criteria "102000" for **Account Number** will return results for any Account Number smaller than 102000 such as 101080 but not anything higher such as 102005.

d. **Less than or equal to** – This filter will return results that numerically smaller or equal (as **Equals**) to the criteria. For example, as with **Less than**, the criteria "102000" for **Account Number** will return results for any Account Number smaller than 102000 such as 101080 but not anything higher such as 102005 and will include the account number 102000 itself since it is equal to your criteria.

e. **Greater than** - This filter will return results that are numerically larger than the criteria. For example, the criteria "102000" for **Account Number** will return results for any Account Number more than 102000 such as 102080 but not anything smaller such as 101005.

f. **Greater than or equal to** – This filter will return results that numerically greater or equal (as **Equals**) to the criteria. For example, as with **Greater than**, the criteria "102000" for **Account Number** will return results for any Account Number more than 102000 such as 102080 but not anything smaller such as 101005 and will include account number 102000 itself since it is equal to your criteria.

g. **Contains** – This filter will return results that exactly match, in whole, the criteria. For example, given the criteria "ILL" for **Owner Full Name**, the filter will return "MICHAEL MILLER" because "ILL" can be found inside of it. It would not return "JOHN S SMITH" since that **Owner Full Name** does not contain "ILL"

h. **Does not contain** - This filter will return results that do not exactly match, in whole, the criteria. For example, given the criteria "ILL" for **Owner Full Name**, the filter will return "JOHN S SMITH" because "ILL" cannot be found inside of it. It would not return "MICHAEL MILLER" since that **Owner Full Name** does contain "ILL".

i. **Like (wildcards)** – This filter is similar to **Contains**, however, it allows you to place an **<*>** in your criteria and that will take the place of any other character, allowing you to match parts of your results to your criteria instead of the entirety of it as in **Contains**. Placement of the wildcard **<*>** allows you to control your output. For example, given criteria "*ST*" for Location, the filter will return 12 N MAIN ST, 13 N MAIN ST and any other results that have ST in them regardless of what is before or after the ST.

j. **Not like (wildcards)** – This filter is similar to **Contains**, however, it allows you to place an **<*>** in your criteria and that will take the place of any other character, allowing you to match parts of your results to your criteria instead of the entirety of it as in **Contains**. Placement of the wildcard **<*>** allows you to control your output. For example, given criteria "*ST*" for Location, the filter will exclude 12 N MAIN ST, 13 N MAIN ST and any other results that have ST in them regardless of what is before or after the ST.

k. **Match (regular expression)** – This filter is similar to **Like** and **Not like** but returns results that match the criteria in part or whole without having to place the wildcard **<*>**. For example, given criteria "ST" for **Location**, the filter will return 12 N MAIN ST, 13 N MAIN ST and any other results that hav ST in them regardless of what is before or after the ST.

l. **Does not match (regular expression)** – This filter is similar to **Like** and **Not like** but excludes results that match the criteria in part or whole without having to place the wildcard **<*>**. For example, given criteria "ST" for **Location**, the filter will exclude 12 N MAIN ST, 13 N MAIN ST and any other results that have ST in them regardless of what is before or after the ST.

m. **Starts with** – This filter will return results that match the criteria so long as it is at the beginning of the results. For example, given criteria "MI" for **Owner Full Name**, the filter will return MICHAEL MILLER and any other **Owner Full Name** entries that start with "MI".

n. **Does not start with** – This filter will exclude results that match the criteria so long as it is at the beginning of the results. For example, given criteria "MI" for **Owner Full Name**, the filter will exclude MICHAEL MILLER and any other **Owner Full Name** entries that start with "MI".

o. **Ends with** – This filter will return results that match the criteria so long as it is at the end of the results. For example, given criteria "ER" for **Owner Full Name**, the filter will return MICHAEL MILLER and any other **Owner Full Name** entries that end with "ER".

p. **Does not end with** – This filter will exclude results that match the criteria so long as it is at the end of the results. For example, given criteria "ER" for **Owner Full Name**, the filter will exclude MICHAEL MILLER and any other **Owner Full Name** entries that end with "ER".

5. The following example shows the use of 'Like(wildcards)' for a filter of the **Owner Full Name** field. The asterisk (*) is used as the wildcard, and in this example the filter entry "*Michael*" will result in Owner Names "Michael".

Secondary Searches

Additional search options can be accessed by clicking on the **Secondary Searches** tab in the **Parcel Search Criteria** window.

Search by Cross Streets:

To search by **Cross Streets**, select two streets from the drop-down menus then press the **Enter** key or click the **Select** button in the **Cross Streets** box.
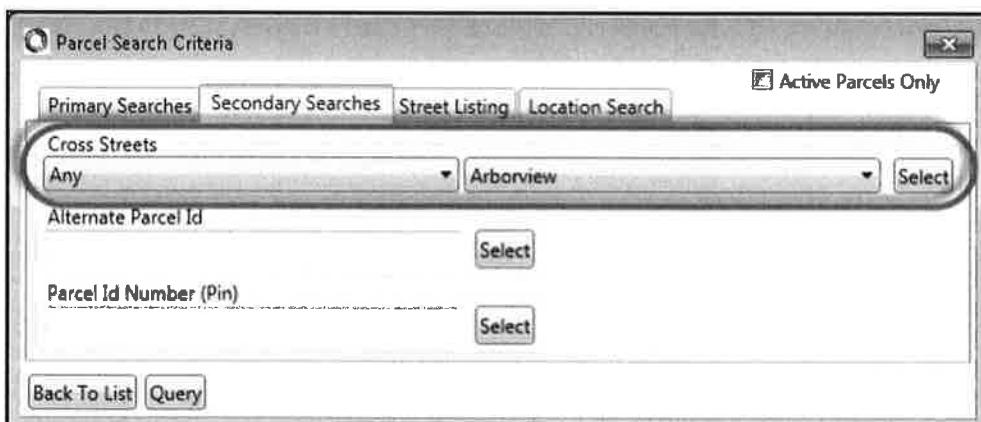
Search by Alternate Parcel ID:

To search by **Alternate Parcel Id**, enter the **Alternate Parcel Id** as shown then press the **Enter** key or click the **Select** button in the **Alternate Parcel Id** box.
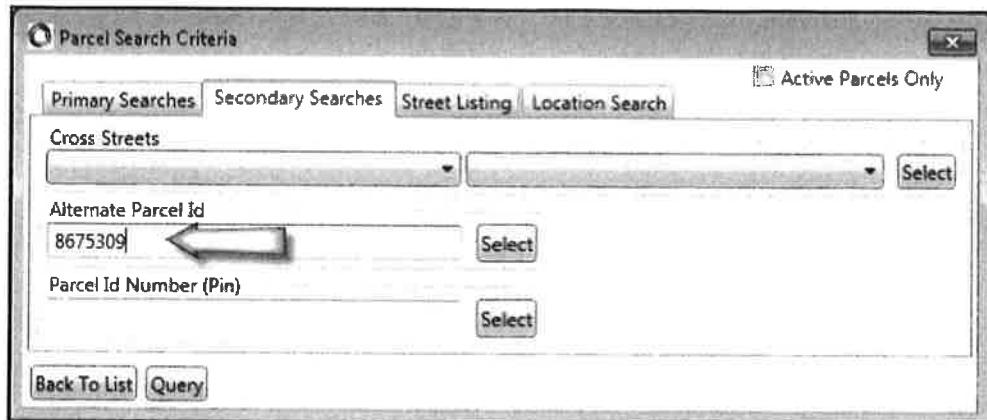
Search by Parcel Id Number (PIN):

To search by **Parcel Id Number**, enter a **Parcel Id Number** as shown then press the **Enter** key or click the **Select** button in the **Parcel Id Number (PIN)** box.
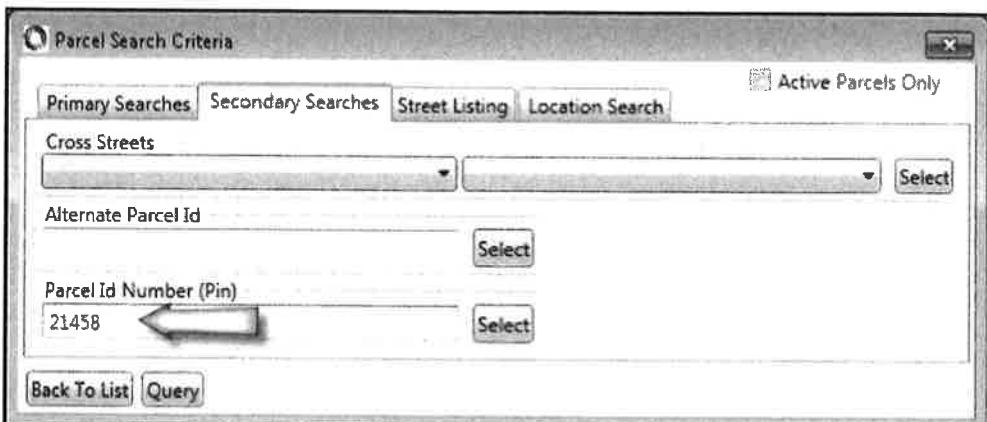
Street Listing

A search by **Street Listing** is also available. The street listing search allows you to select all of the streets you want to query.
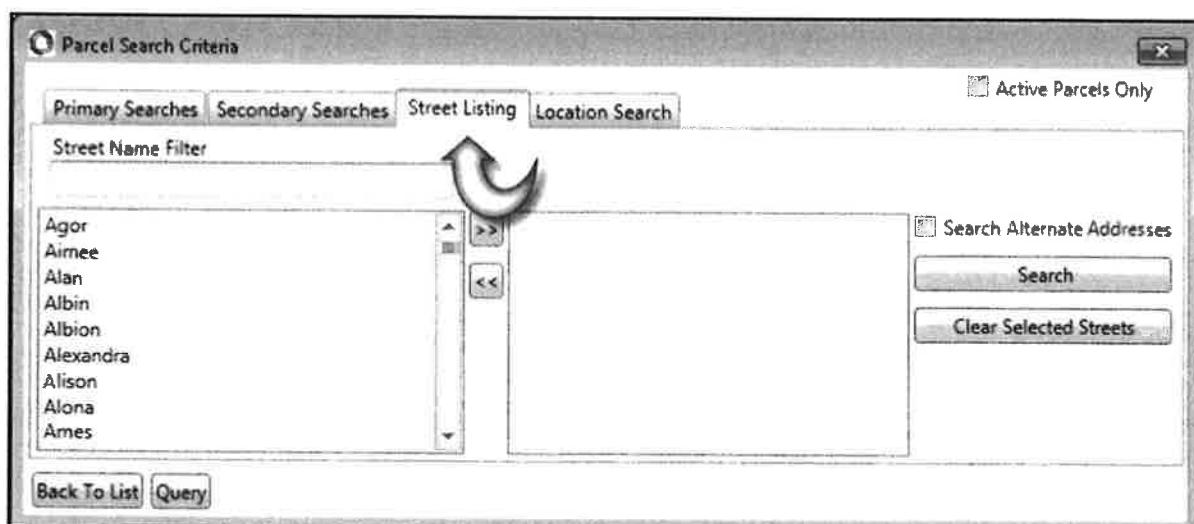
1. On the **Street Listing** screen, enter desired filter characters, select the subject street(s) from the box on the left side, then click the **>>** button.
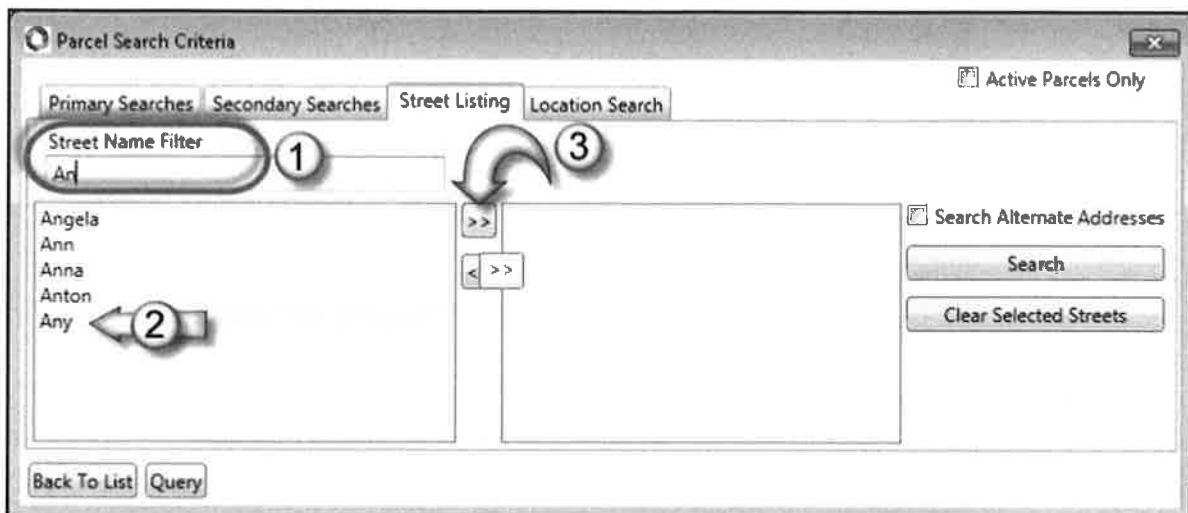
2. This will add the selected street to the **Selected Streets** box. When you have all of the streets that you would like to search in the **Selected Streets** box, click the **Search** button to initiate the search.
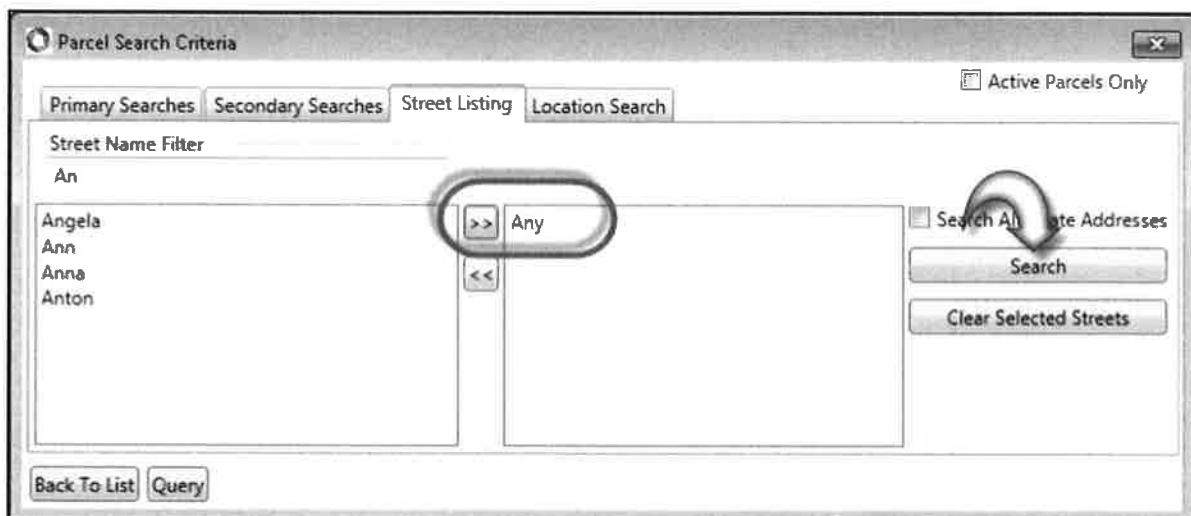
3. Checking off the **Search Alternate Addresses** checkbox will allow you to search for all addresses associated with a parcel rather than specifically the primary address.
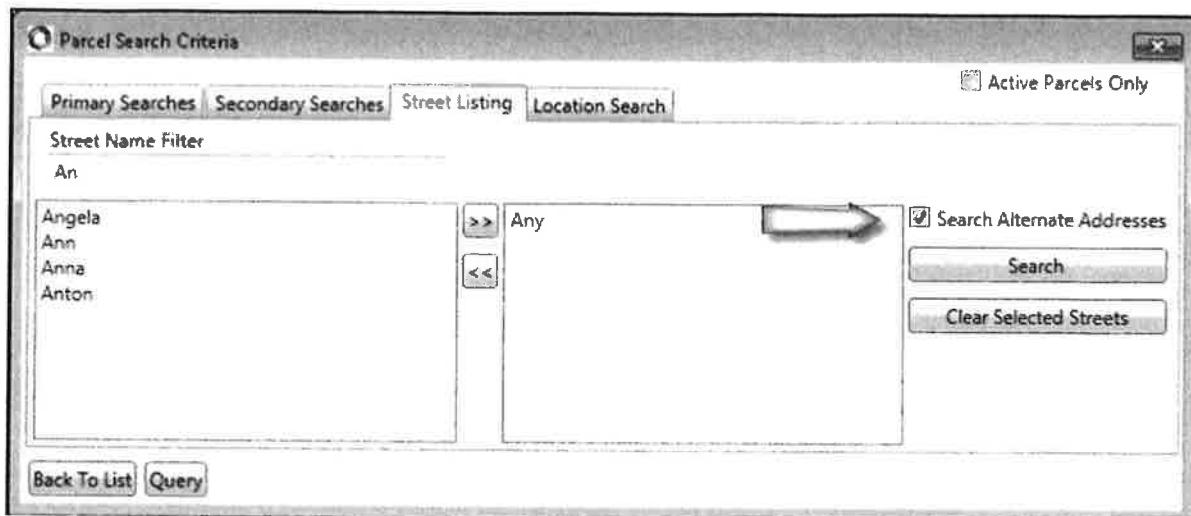
4. To remove a selected street, click on the street you wish to remove, then click the << button.
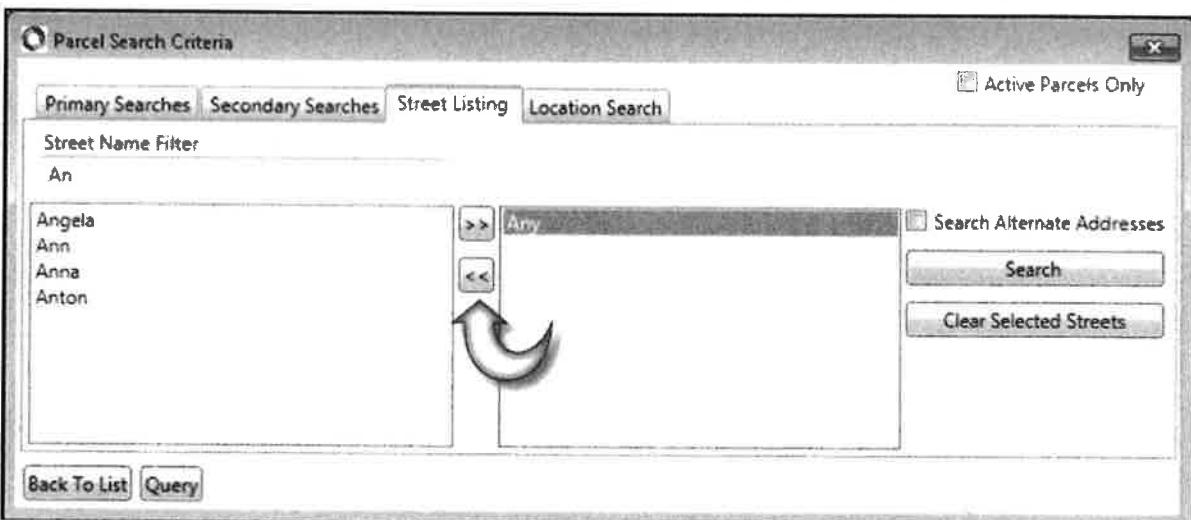
5. To clear all streets from the **Selected Streets** box, click the **Clear Selected Streets** button.
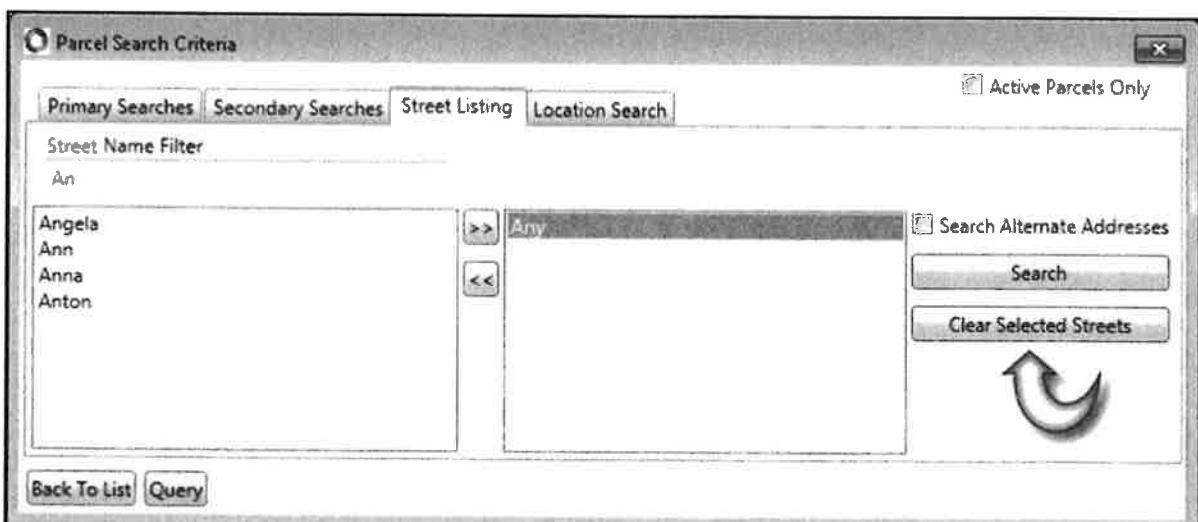
Location Search

There is also a detailed Location Search.
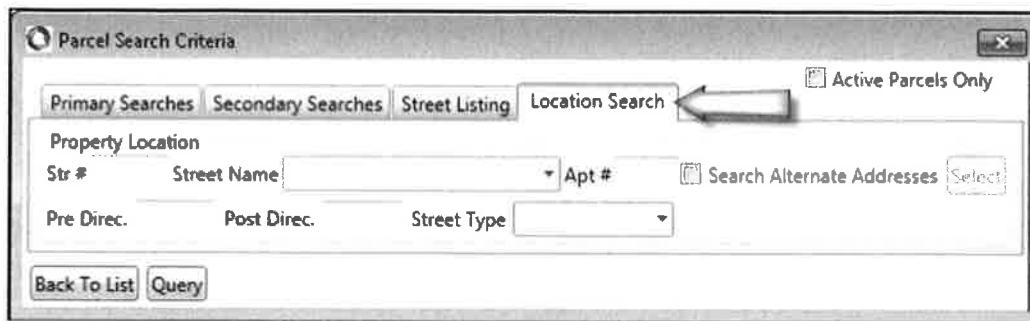
1. On the **Location Search** screen, you are able to search in a manner similar to the **Property Location** search under the **Primary Search** tab but with the additional criteria of **Pre Direction**, **Post Direction** and **Street Type** if enabled for the municipality.
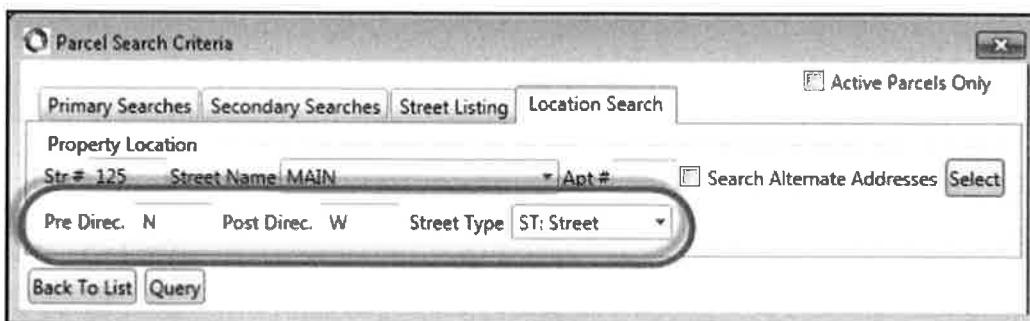
2. After filling in the fields you would like to search by, click the **Select** button.
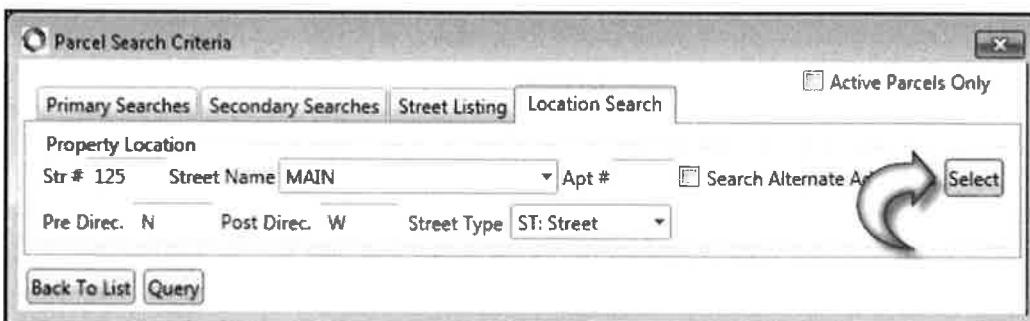
Search Active Parcels Only

By default, the search function will return all records in the database regardless of Parcel Status. To return only Active database records in the search results, check the **Active Parcels Only** button in the top right hand corner of the search window.

Parcel Search Criteria

Primary Searches	Secondary Searches	Street Listing	Location Search

☑ Active Parcels Only

MBLU _____ Select

Vision Id _____ Select

Property Location

Street Number _____ Street Name [▼] Unit

☑ Search Alternate Addresses Select

Owner Name _____

☑ Only Search Current And Future Owners Select

Account Number _____ Select

[Back To List] [Query]
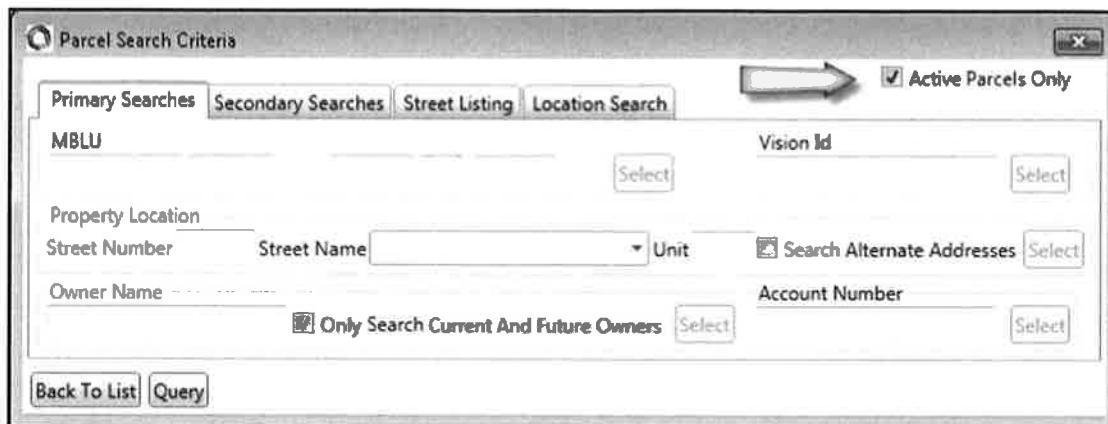
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How to Search with Custom Criteria

This document will walk the user through the custom criteria search functionality of Vision 8.

1. Clicking the **Binoculars** icon ⌕ will bring up the **Parcel Search Criteria** window. To search using custom criteria, click on the **Query** button.
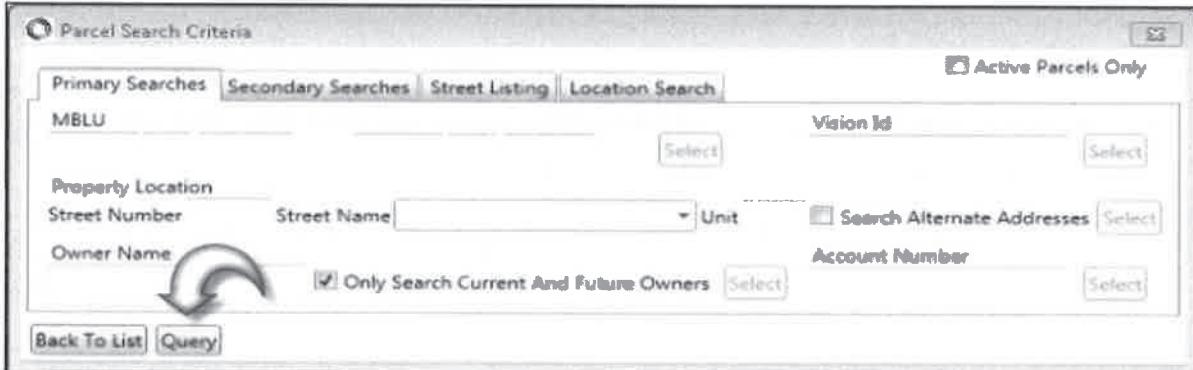
2. After clicking the **Query** button you will be brought to **the Custom Parcel Search** window.
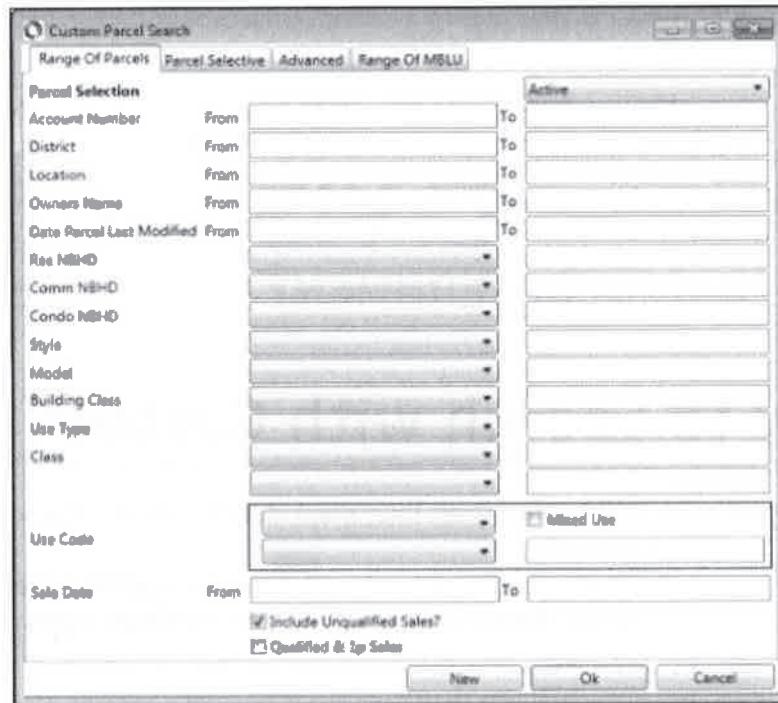
Range of Parcels Tab

In this tab, you can customize your search based on a **range of values** in the Acct Num, PIN, Location, Owner Name, Activity Date and/or Sale Date fields. In the **From** and **To** boxes, enter the values you would like to search between and then click the **OK** button.
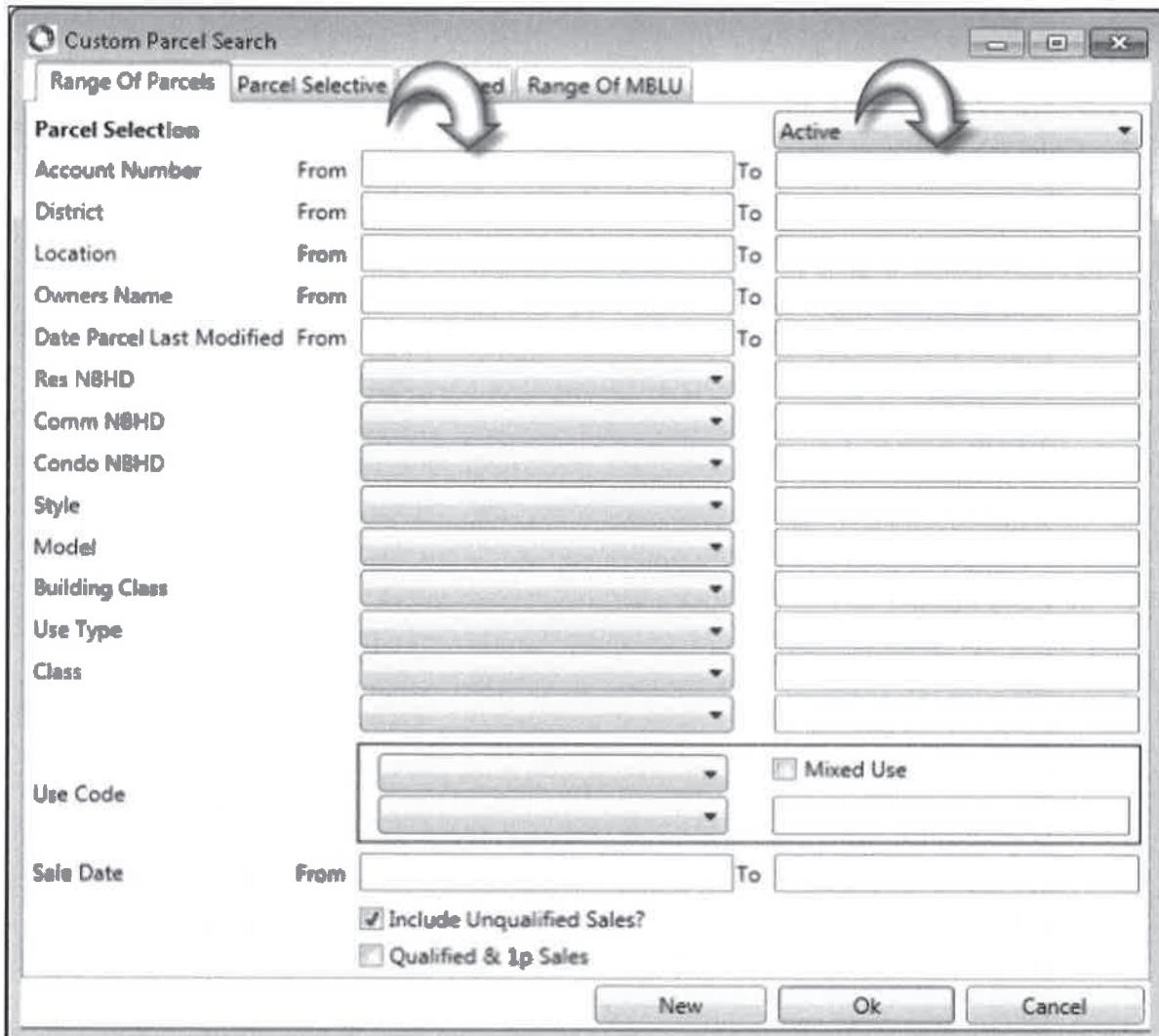
Parcel Selection

1. The Range of Parcels tab also contains other fields that you can use to narrow down your search including Res. NBHD, Comm. NBHD, Condo NBHD, Styles, Building Models, Use Code, Use Type Codes, and Land Use Codes.

Custom Parcel Search

Range Of Parcels | Parcel Selective | Advanced | Range Of MBLU

Parcel Selection   Active ▼

Account Number	From		To	
District	From		To	
Location	From		To	
Owners Name	From		To	
Date Parcel Last Modified	From		To	
Res NBHD		▼		
Comm NBHD		▼		
Condo NBHD		▼		
Style		01: Ranch ▼	01	
Model		01: Residential ▼	01	
Building Class		210: Single Family ▼	210	
Use Type		▼		
Class		▼		
		▼		

Use Code
☐ Mixed Use

Sale Date   From   To

☑ Include Unqualified Sales?
☐ Qualified & 1p Sales

New   Ok   Cancel

2. Either **type** a value in these fields, or **select** the option(s) from the **drop-down** menu. After selecting the option from the drop-down, it will **automatically** populate in the selected fields box to the **right**.
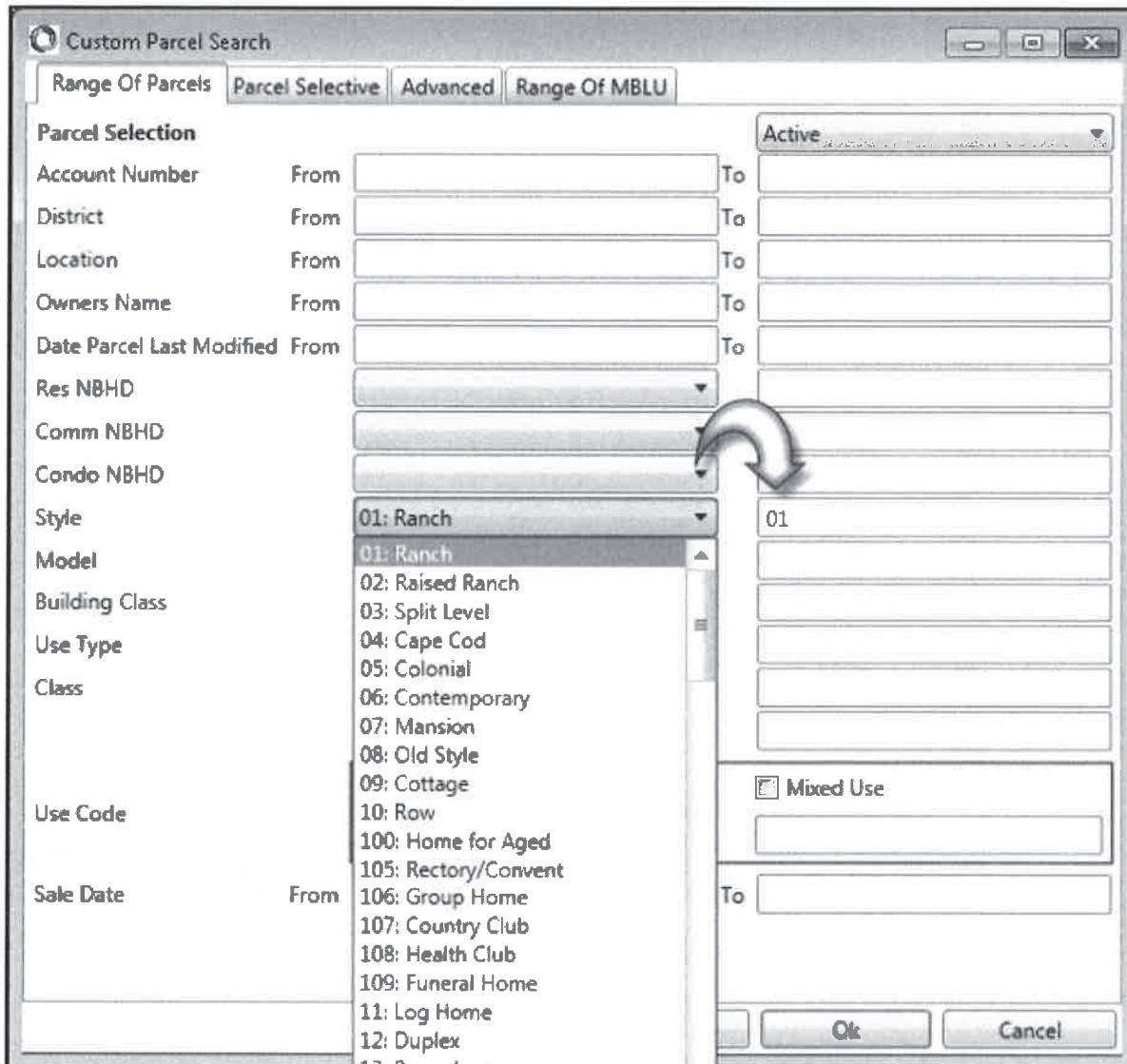
Parcel Selective

This screen is used to search for parcels by certain database fields. The first option is to search by individual parcel, and the second is to search by a Parcel List.
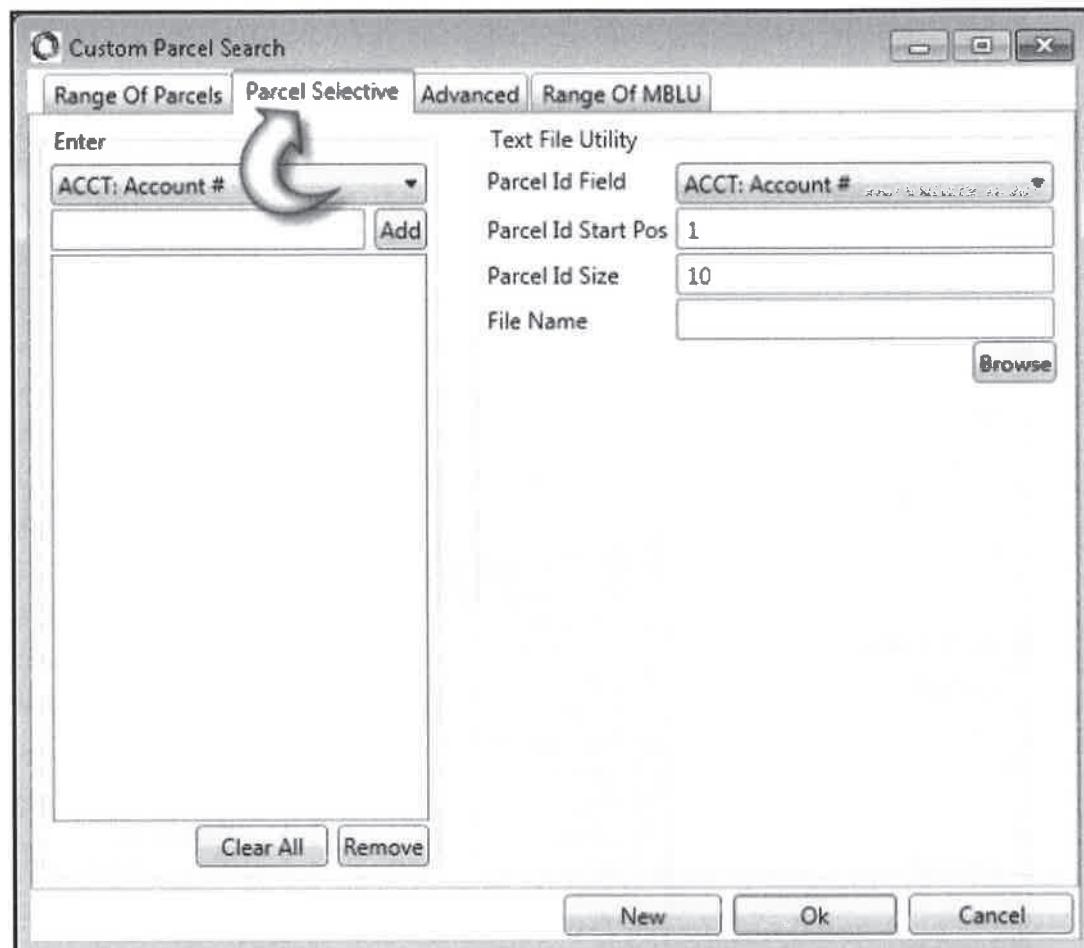
By Individual Parcel

The left section allows you to search for certain parcel identifiers like Account Numbers, PID, and GIS ID.

1. For example, select **Account #** from the **drop-down menu**, and type an account number that you would like to search for into the box below.

2. Click the **Add** button to add that account number to your search. You can repeat this process to add multiple account numbers to search by.
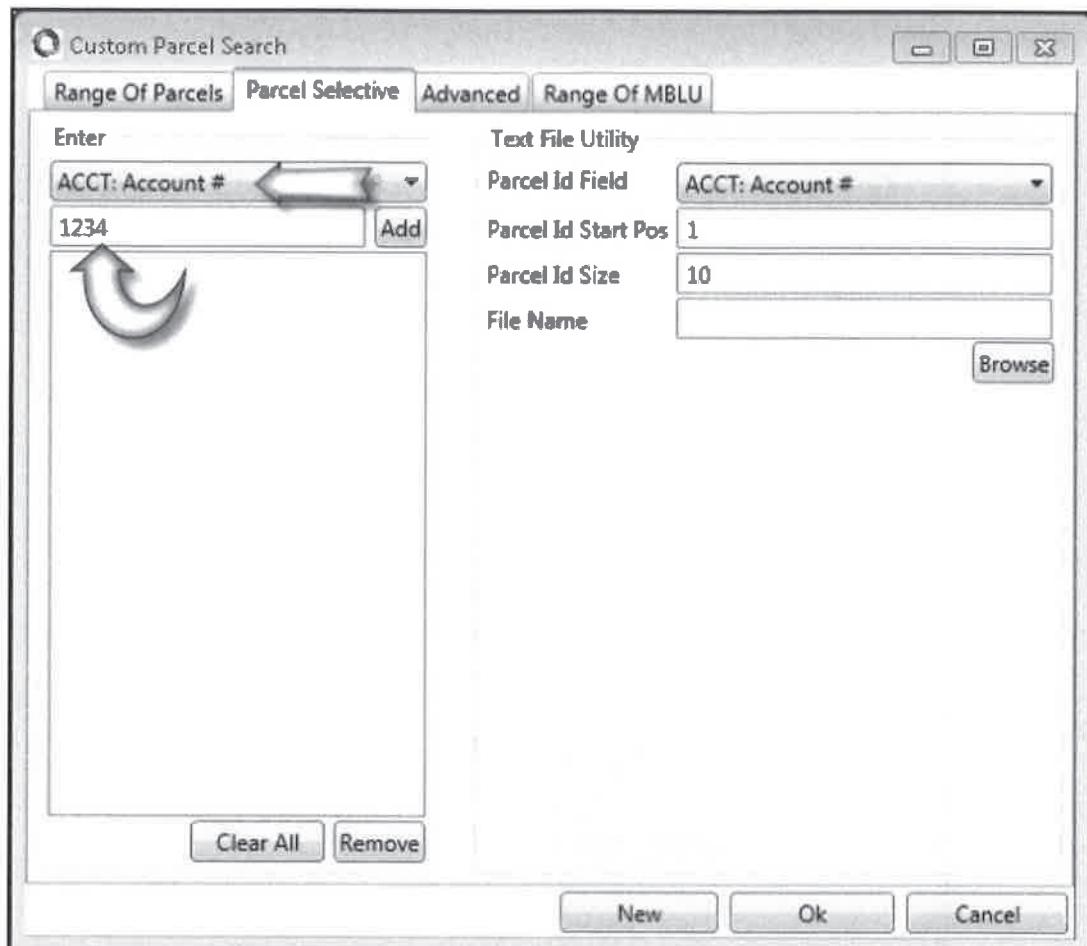
3. To **remove** Account Numbers from the list, simply **select** the number that you would like to remove, and press the **Remove** button.
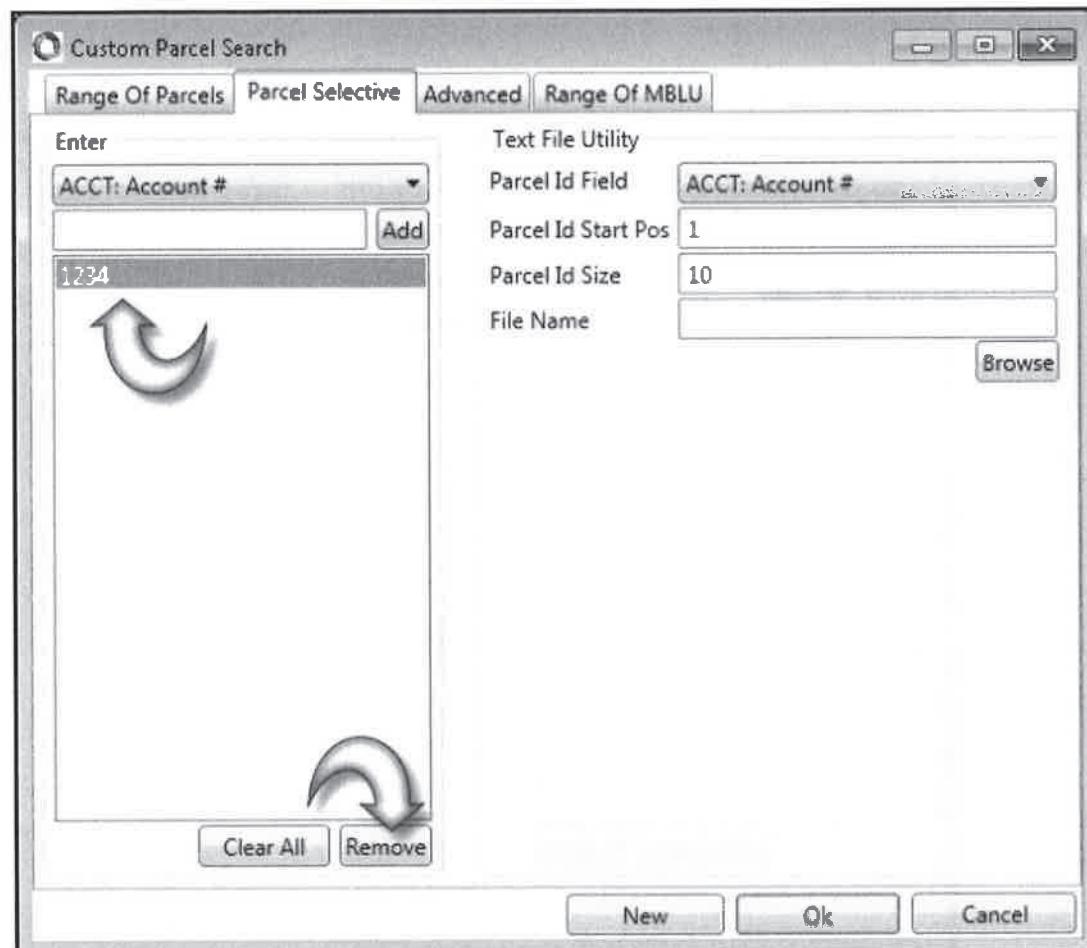
Text File Utility

The second section allows you to browse to a **Parcel List**.

> The Text file utility can use a list of either **Account Numbers** or **PIDs**. Select whichever is listed in your text file in the **Parcel ID Field**. The below example will be using a list of PIDs.
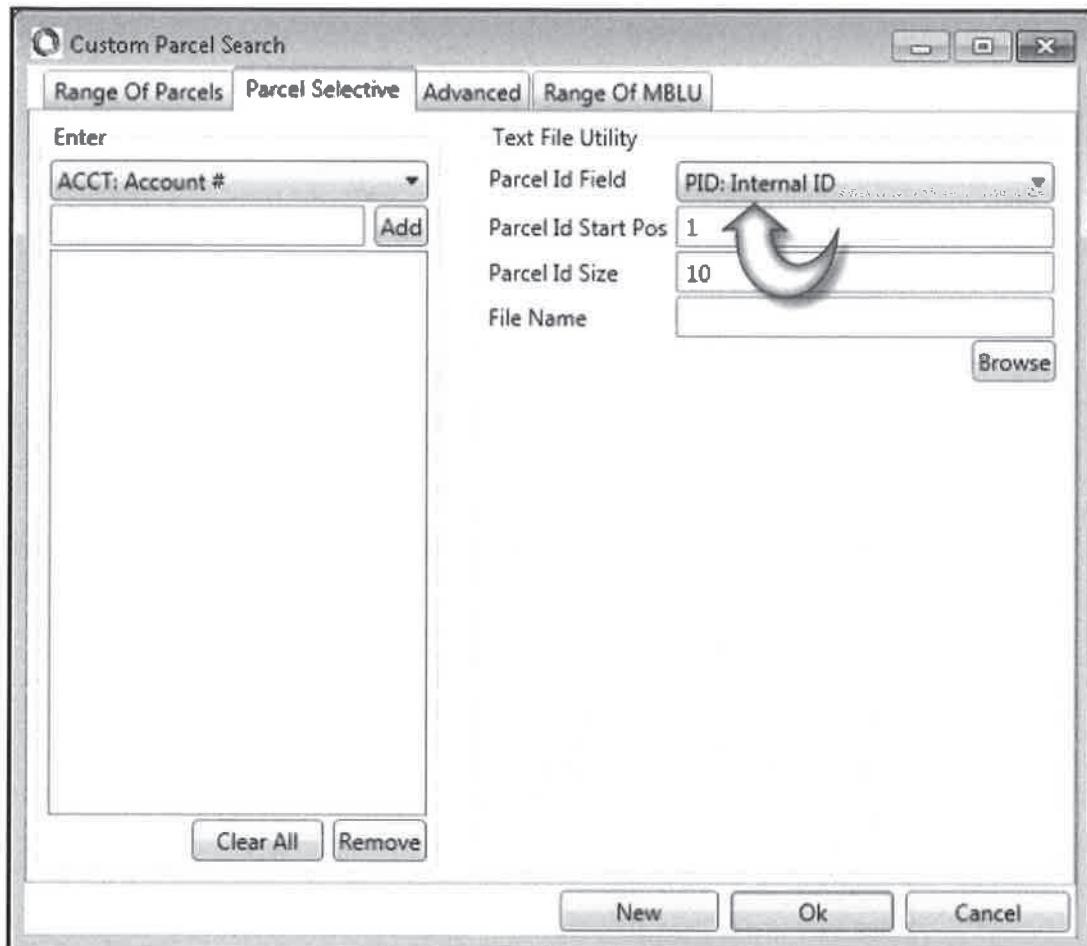
🛈 Enter the Parcel Id Start Pos and Parcel Id Size.

- The **Parcel Id Start Pos** is where in the list the selected data will be pulled from. If you are starting at the beginning of the list, enter 1.

- The **Parcel ID Size** is the **maximum length** of the field size. For PID enter 10, for Account Number enter 20.
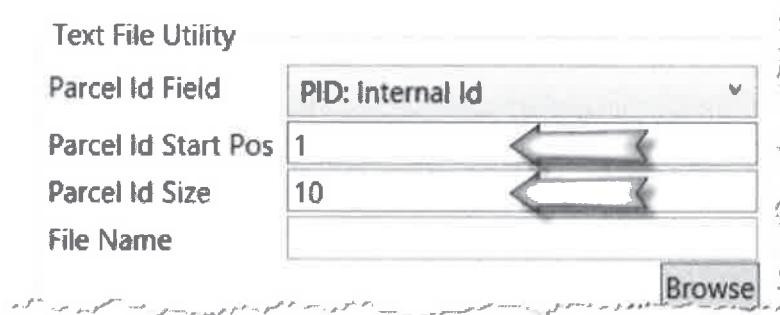
🛈 Next select the **Browse** button.

Text File Utility

Parcel Id Field	PID: Internal Id ⌄
Parcel Id Start Pos	1
Parcel Id Size	10
File Name	

Browse
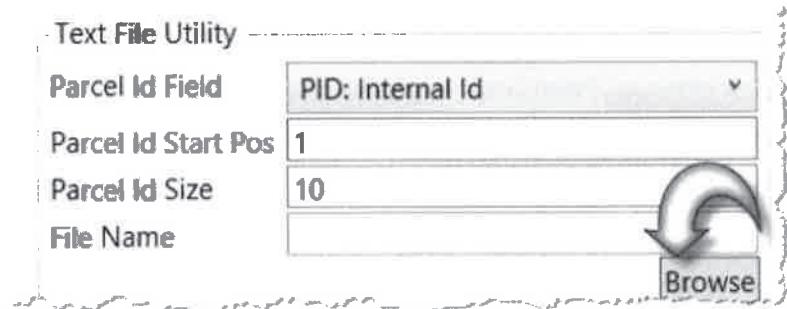
The **Open window** will appear. Navigate to the **folder** where your **text document** containing your list of **PIDs**. Select the file to be used and then click **Open**.

The **path** to the selected file will appear in the **File Name** field. Click **OK** to bring up a list of the parcels in the specified text file.
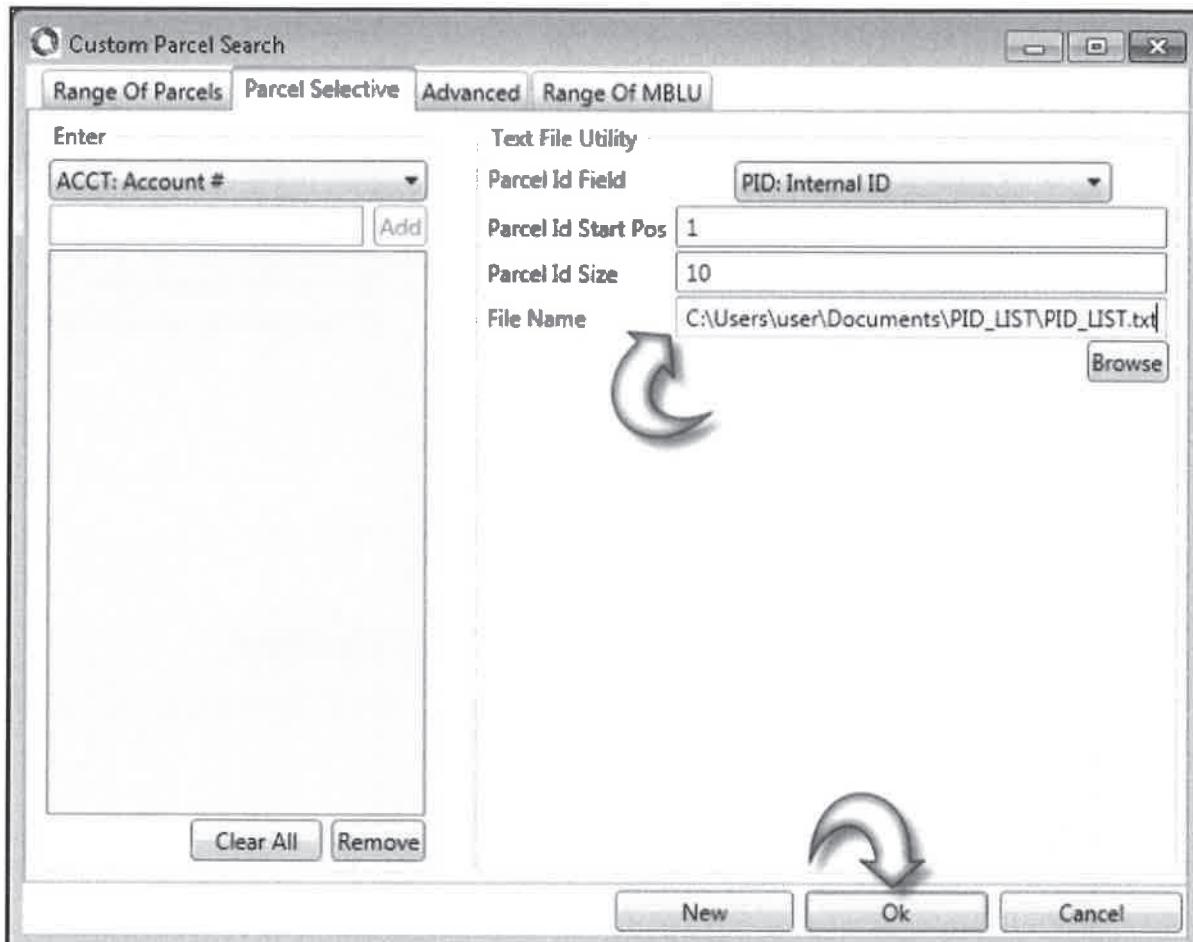
i The search **results** will show.

MBLU	Location	Owner Full Name	Co-Owner Full Name	Primary Use	Account Number
ᴬᵃ	ᴬᵃ	ᴬᵃ	ᴬᵃ	ᴬᵃ	ᴬᵃ
100 / / 20 / / 30 / / 1 /	1 N MAIN ST ST W UNIT	MICHAEL MILLER	MARY MILLER	100R	10020301
100 / / 20 / / 30 / / 2 /	2 N MAIN ST ST W UNIT	MICHAEL JONES	MARY MILLER	100R	10020302
100 / / 20 / / 30 / / 3 /	3 N MAIN ST ST W UNIT	MICHAEL SMITH	MARY MILLER	100R	10020303

Advanced

This tab is used to make **custom search queries** based on any Vision database field.
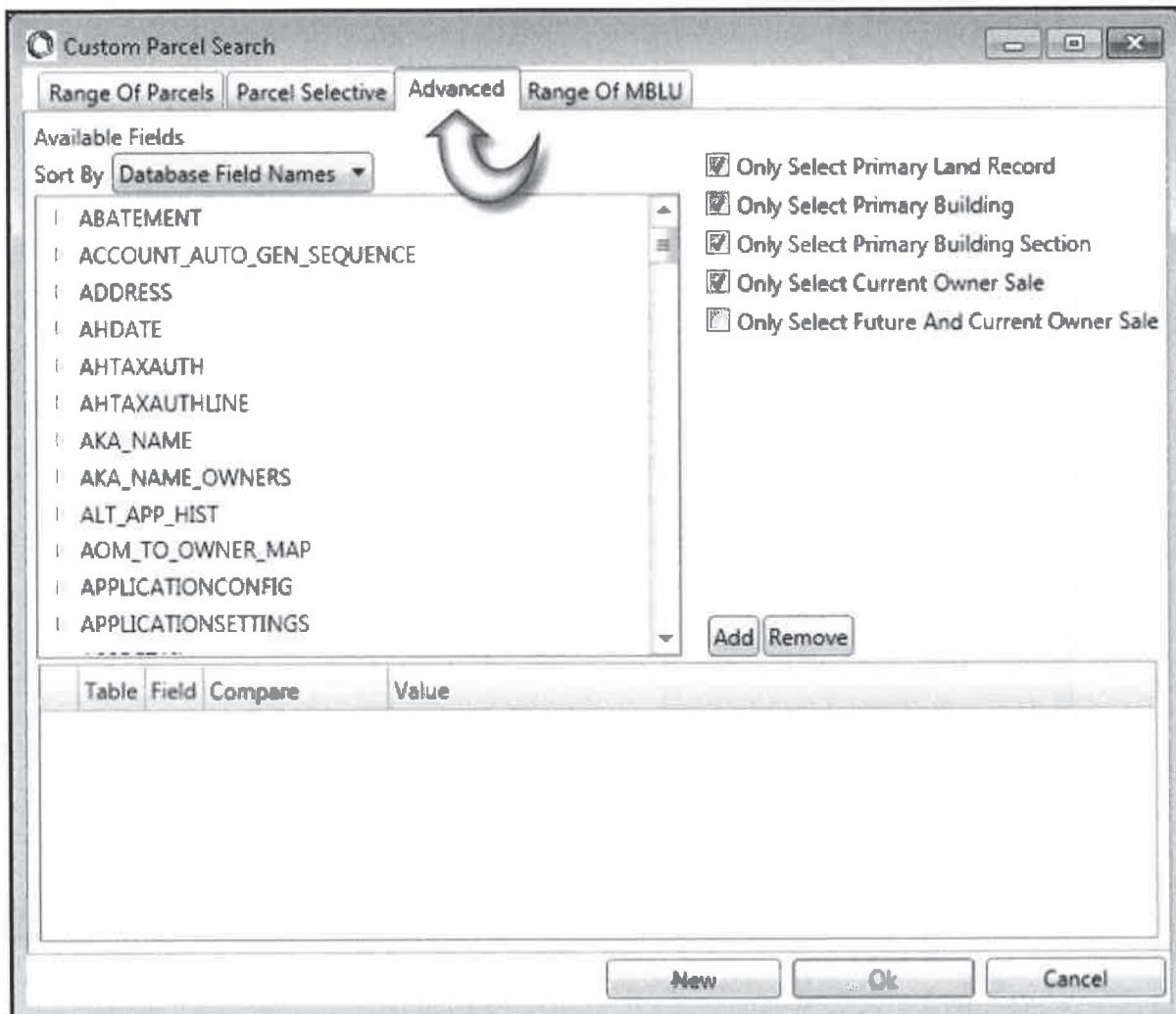
Crafting a Custom Query

1. Select the **database field** that you would like to use in the window to the left (in this example, Building Number has been selected from the BLDG table).

2. Click the **Add** button. A criteria **line** will be created.

3. Using the **drop down** from the **Compare** section, select a **compare operator**, then enter a value to compare with the database field. (In this example our compare operator is "=" (Equal to) and the value is "3"
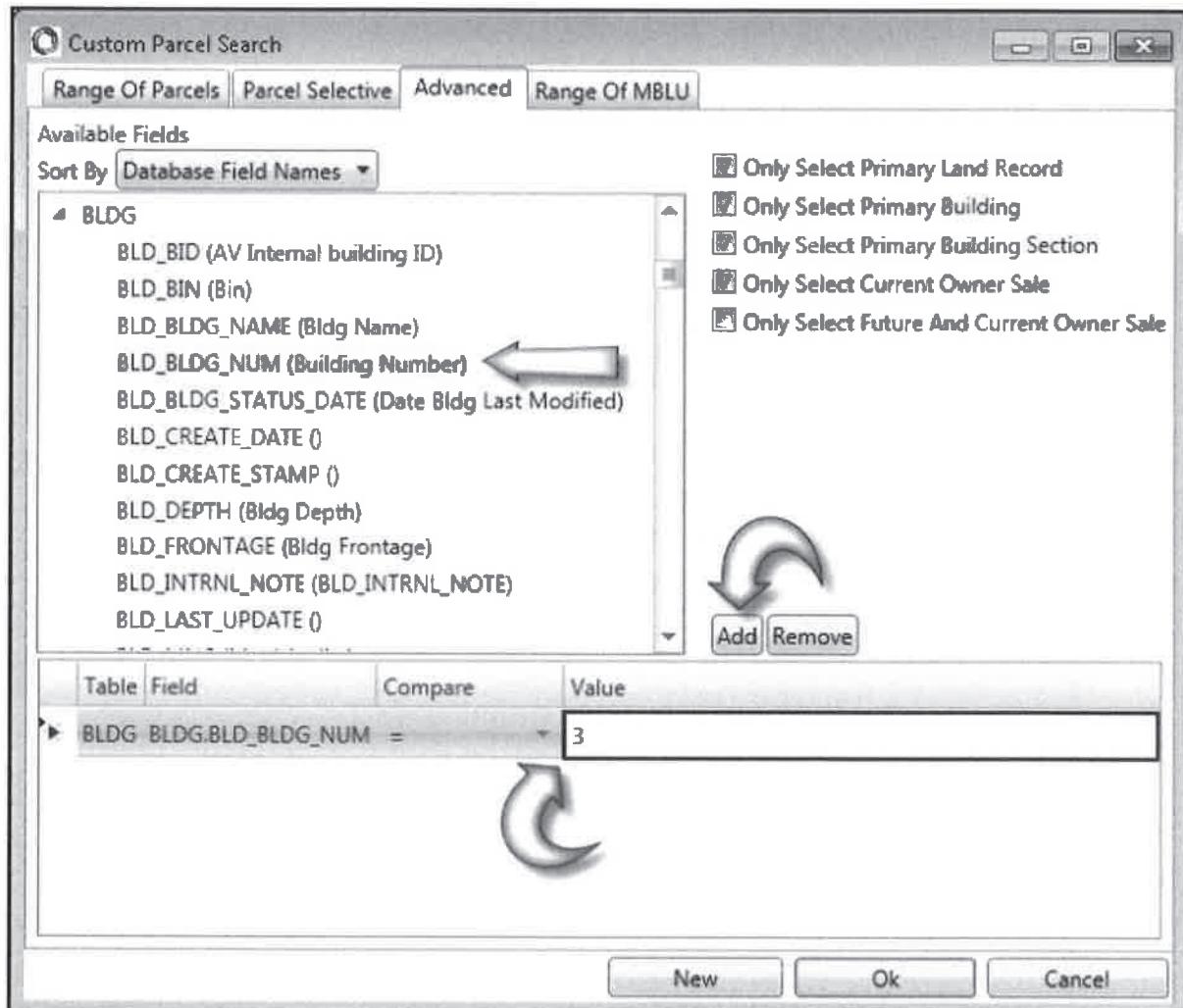
4. Multiple search criteria may be used. In the example below, in addition to searching for Building Number 3, criteria have been added to search for only parcels where the Assessed Building value is greater than (>) 100,000 and the Land Use Code begins with "1."
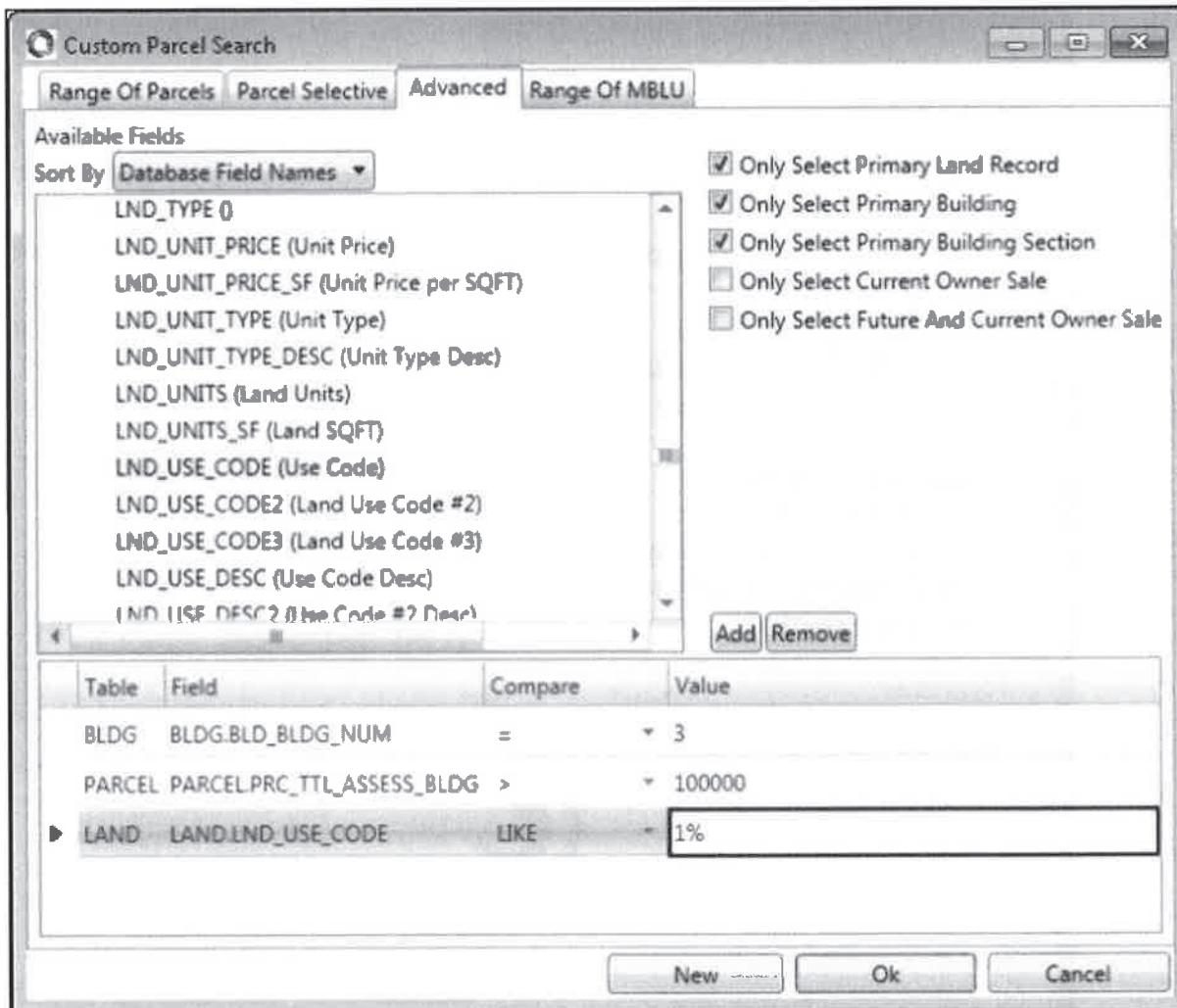
5. To edit or remove a custom criteria, simply **highlight** it and edit any of the fields or click the **Remove** button.

Range of MBLU's

This tab is used to search based on a range of **MBLUs**. You are able to choose a separate range for Map, Sub Map, Block, Sub Block, Lot, Sub Lot, Unit, and Sub Unit.

To use this screen, simply fill in ranges for the fields you would like to search (Map, Block, Lot, etc.), then click the **OK** button.

You can click the **New** button at any time to clear any fields and start a new query.

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Navigation Tree

The purpose of this document is to explain the navigation tree labeled **Vision 8 Application Explorer** located on the left-hand side of the Vision 8 application.

Difference between Vision Modes

The navigation tree contains the different screens containing parcel data. The tree options vary between the Real Estate and Personal Property sides of the application.

In the Real Estate navigation tree, the user will see options for **Parcel**, **Owner Maintenance**, **Reports**, **Table Maintenance**, **Comps & Apportionment Cost Modeling** and **Smart Links** (if enabled). The high-level options will highlight in orange when selected. The sub-options will show in gray when selected.
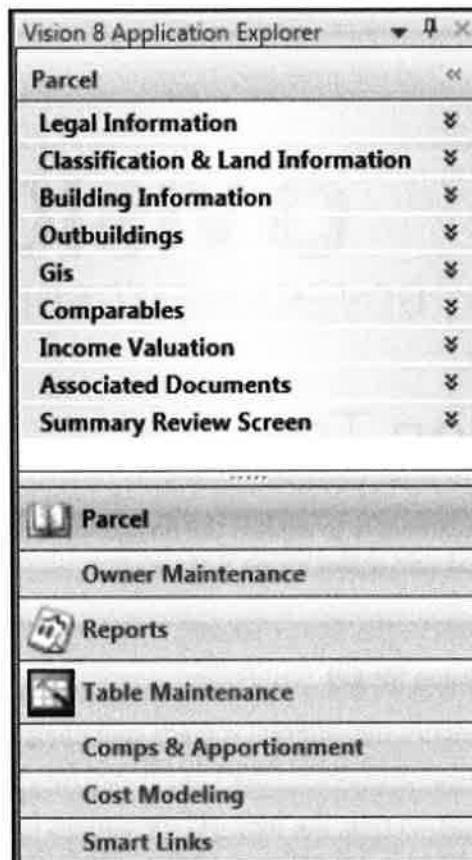
In the Personal Property navigation tree, the user will see options for **Personal Property, Owner and Address, Reports**, and **Table Maintenance**.
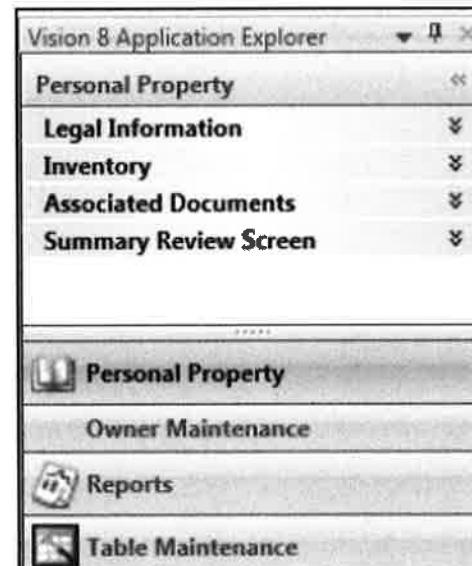
Difference between Options

Depending on the high-level option selected, different sub-options will show. For example, the Real Estate Table Maintenance button option contains rate tables related to real estate parcel data.
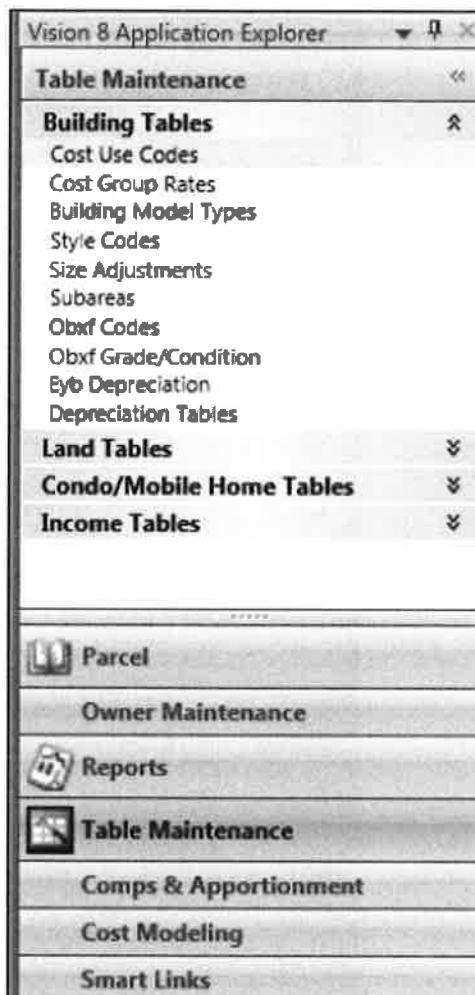
Additionally, when in the Real Estate mode, the options under Building Information change depending on the parcel building model type open. In the example screen capture below, the user will see that the Associated Condos, and Condo Main Elements options are selectable. If the user is on a non-condo unit building model, these options will not be available.
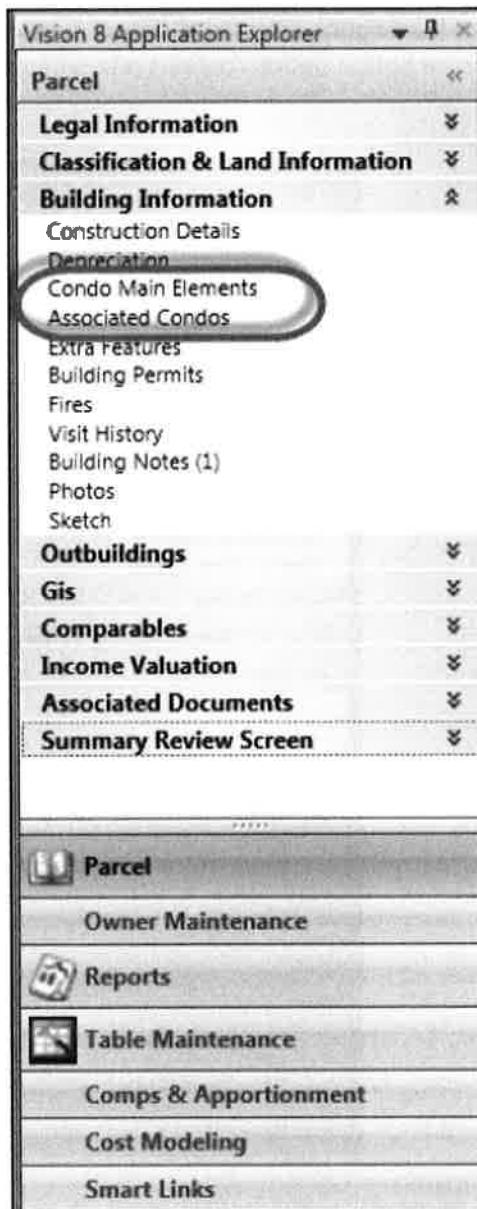
The user can collapse the individual sub-options in the navigation tree by selecting the darker gray options. The arrows pointing down ⅋ indicate the section is collapsed, the up arrows ⅋ indicate the section is expanded. For example, all of the items are collapsed except for the Building Information section in the image below.
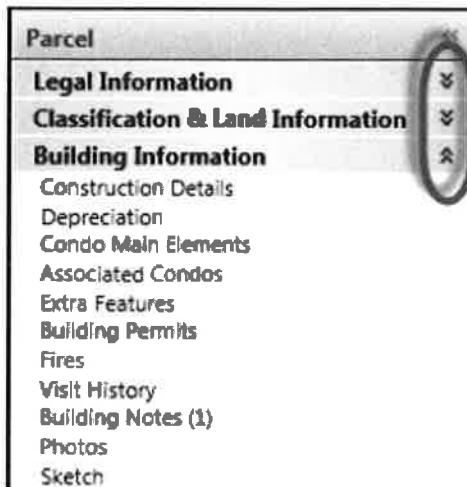
Some options may not appear if the user does not have the plugin installed in their version of Vision. For example, the Marshall and Swift Plugin and Homestead/Farmstead sections are only available after being enabled. Contact Customer Support (1-800-628-1013 x6000) for assistance enabling these features.

Navigation buttons

1. A user can select which navigation button options are viewable by clicking the drop-down arrow at the bottom of the navigation tree, then selecting the items to be set as viewable.
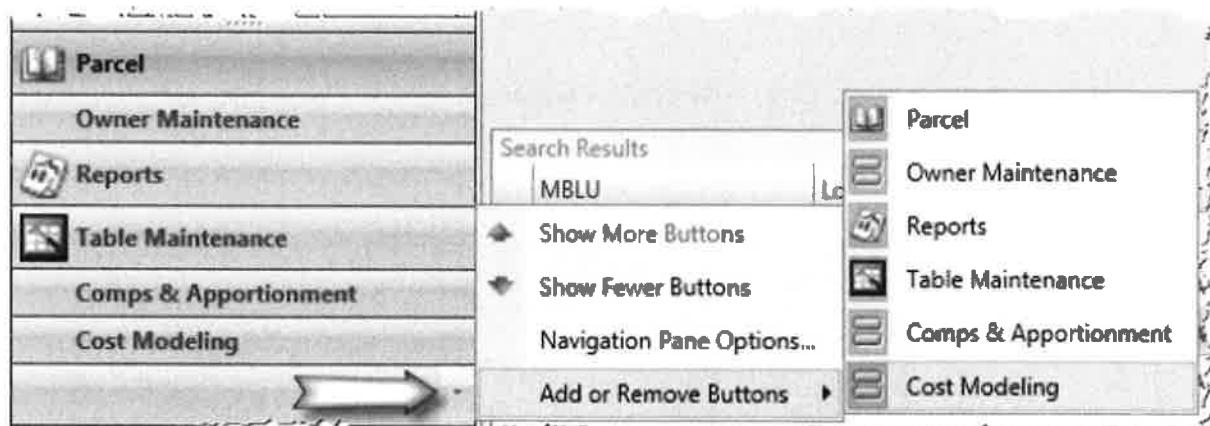
2. The user can click on **Show Fewer Buttons** to hide the lowest button in the navigation tree.
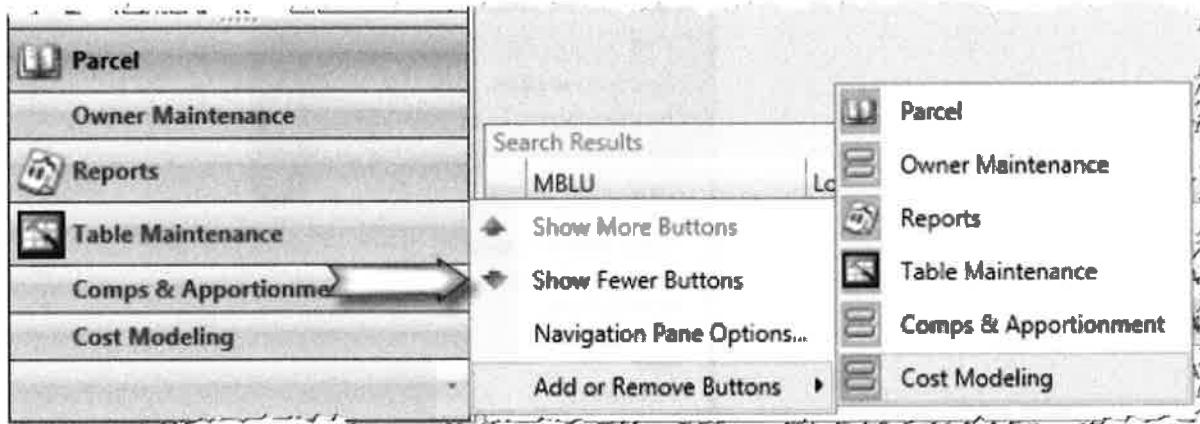
3. The hidden buttons will then show as **two horizontal lines** or **a related-button icon,** to indicate they are hidden. Select these buttons to navigate to the hidden option.
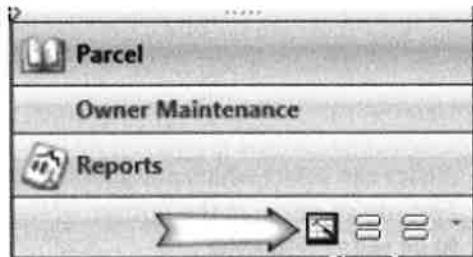
4. Click on **Show More Buttons** to show the last hidden button with the label in the navigation tree.
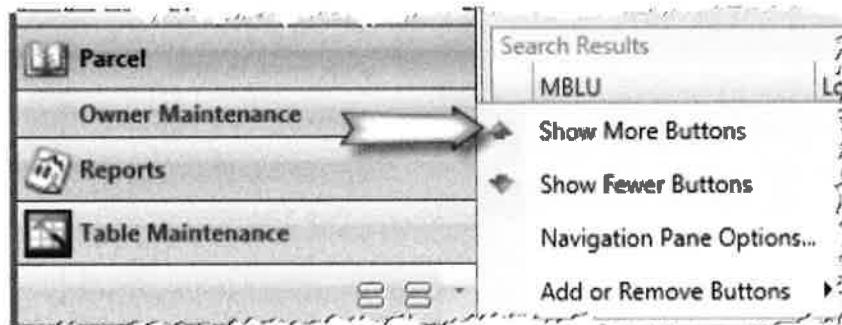
5. Select **Navigation Pane Options** to open the window that allows the user to select which options show and in which order they appear.
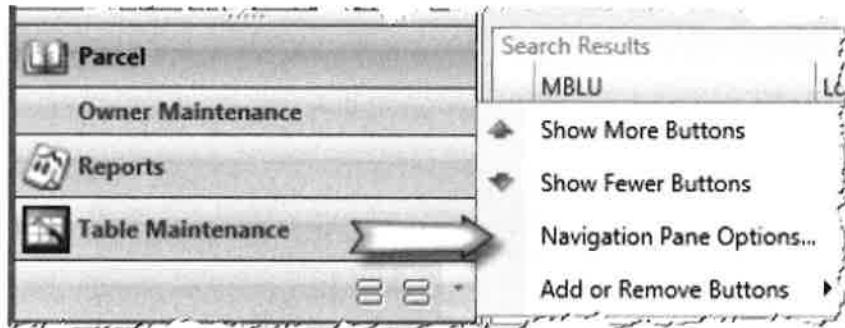
6. Use the **Move Up** and **Move Down** buttons to order the options. **Reset** will set the options back to default.
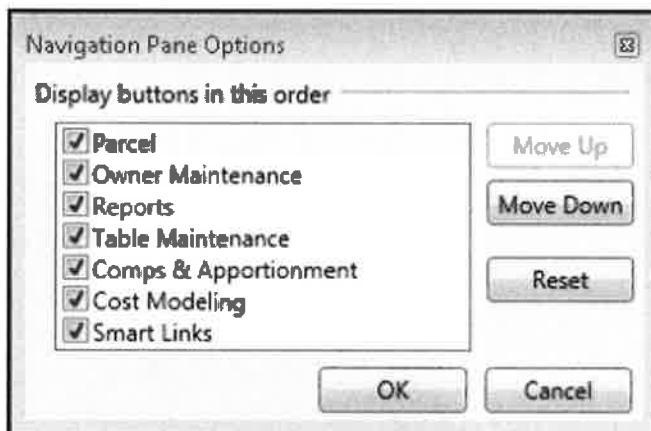
7. A final option is to use the mouse and hover over the divider bar until the cursor becomes a **two-headed arrow**.
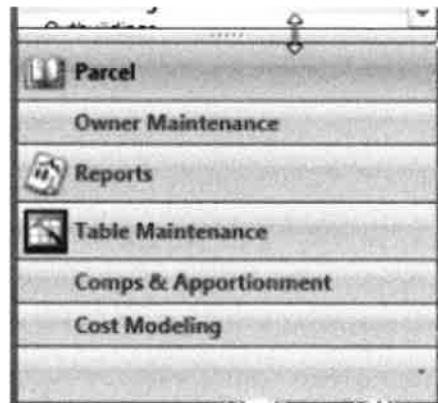
8. Once the cursor changes, **drag** the lower button section up or down to make the buttons completely visible with labels or to show the button only.

🛈 Click and drag the arrow **down** to reduce the section size and show the compressed options as buttons.
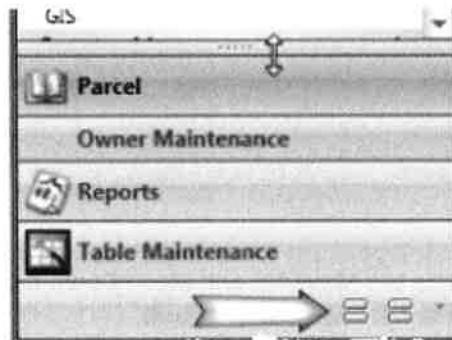
🛈 Click and drag the arrow **up** to increase the section size and show the options as a list.
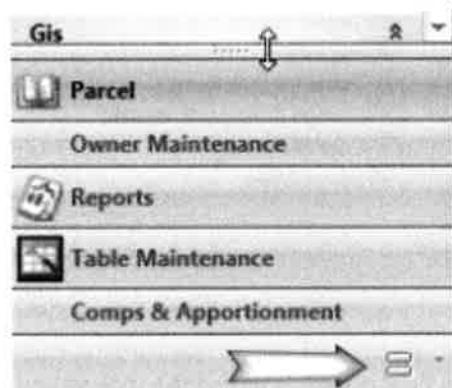
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Parcel Information Bar

This document will familiarize the user with the Parcel Information Bar in Vision **8**.

The **Parcel Information Bar** is located just below the system toolbar. The Parcel Information Bar contains valuable information about your parcel. The options for what data to display on the Parcel Information Bar is maintained in the **Admin Module**.
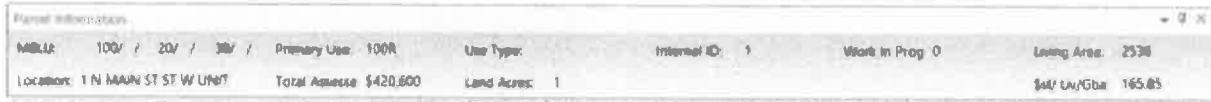
1. To **Auto-Hide** the **Parcel Information Bar**, click the **push pin** in the upper right hand corner.
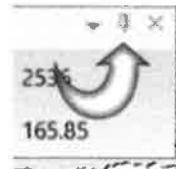
2. After choosing to **Auto-Hide** the **Parcel Information Bar** tab it is positioned above the **Navigation Tree**.


3. You can **hover** the mouse over or **click on** the **Parcel Information Tab** to show the summary bar and review the information.
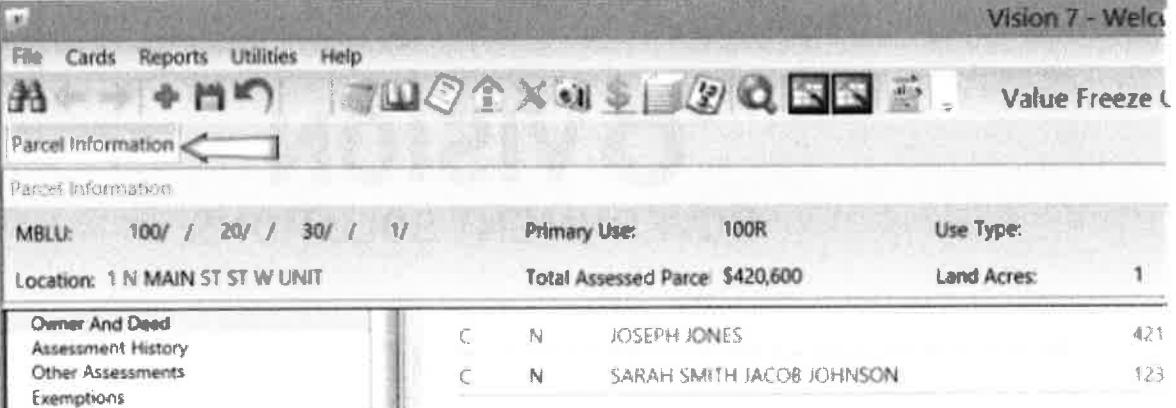
4. To restore the **Parcel Information Bar** to its original position, you can click the push pin at the upper right hand corner while hovering. Alternatively, after you have clicked on the Parcel Information Tab view the summary information.


5. You can also **Auto-Hide**, **Float**, or **Dock** the Parcel Information Bar by clicking the down-arrow in the upper right hand corner.
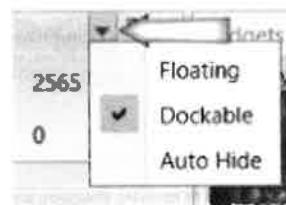
- **Floating** means you can position the Parcel Information Bar anywhere on the screen. In the example below, the **Parcel Information Bar** has been clicked and dragged from the top of the screen to the middle of it.
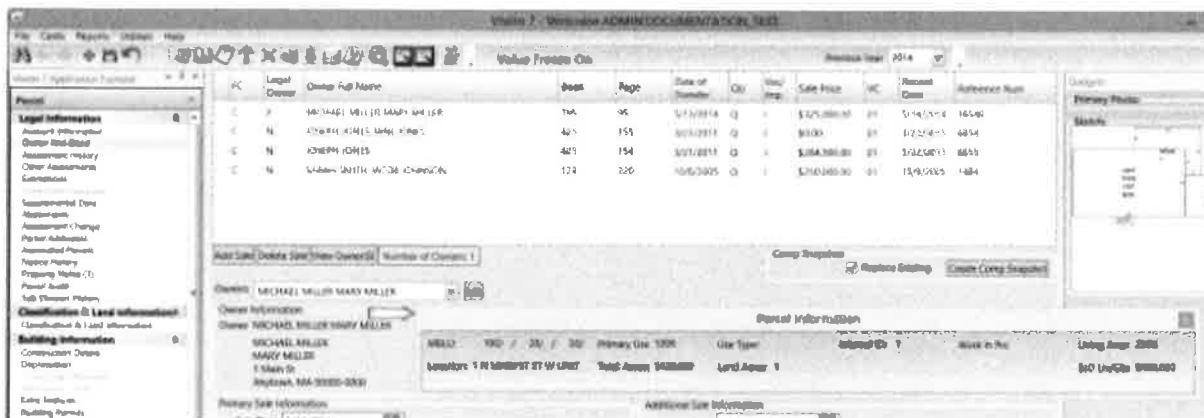
- **Dockable** means the **Parcel Information Bar** is stationed. In the example below, it is indicating that selecting the area indicated by arrow 1 will dock the **Parcel Information Bar** to the highlighted area indicated by arrow 2.
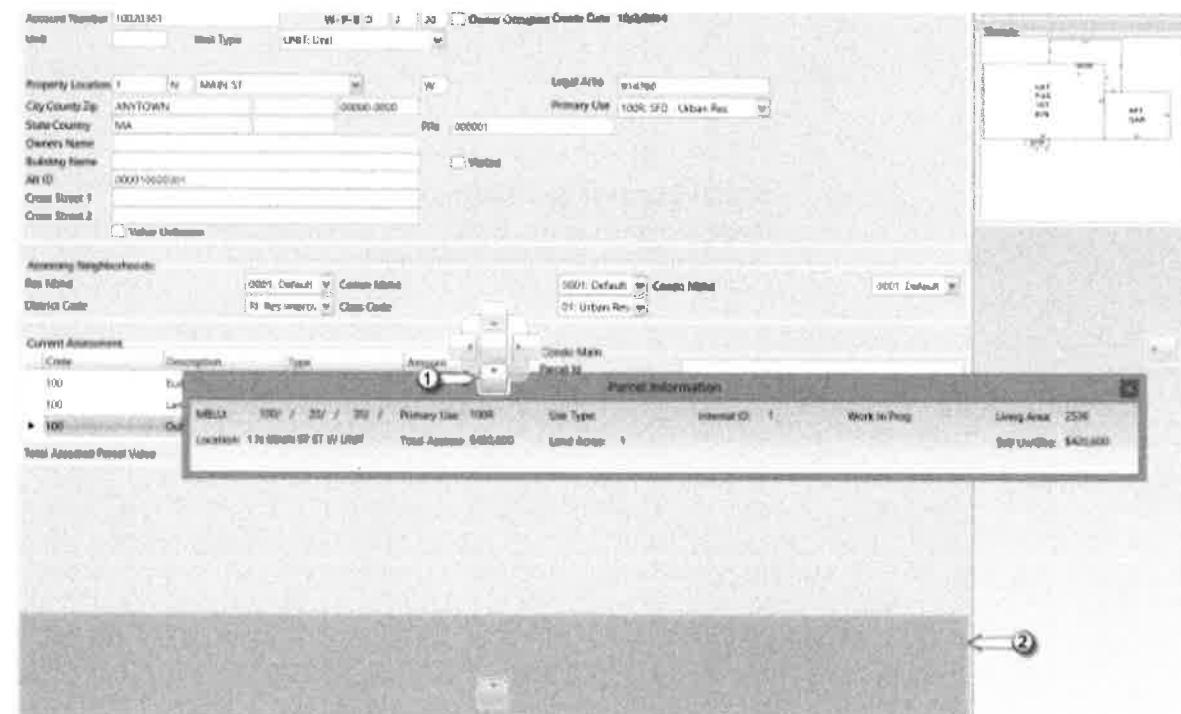

- After clicking, you can see in the example below that the **Parcel Information Bar** has been docked to the highlighted area from the previous example.

Account Number 10020X31   W-P-B 12 / 20 ☐ Owner Occupied Create Date 10/0/2014

Unit   Unit Type   UNIT Unit   ▼

Property Location 1 N MAIN ST   ▼ W   Legal Area 914780
City County Zip ANYTOWN   00000-0000   Primary Use 100h SFD - Urban Res ▼
State Country MA   PIN 000001
Owners Name
Building Name   ☐ Visited
AE ID 00001002020301
Cross Street 1
Cross Street 2
        ☐ Value Unfrozen

Assessing Neighborhoods
Res Nbhd   0001 Default ▼ Comm Nbhd   0001 Default ▼ Condo Nbhd   0001 Default ▼
District Code   Rt Res Impro ▼ Class Code   01 Urban Res ▼

Current Assessment

Code	Description	Type	Amount	
100	Building	Building		$351,300
100	Land	Land		$63,700
▶ 100	Outbldg	Outbldg		$5,400
Total Assessed Parcel Value				$420,000

Condo Main
Parcel Id
Description
Complex Id

Associated Parcels
Associated Parcel ID   Associated Percent   Associated Percent

Parcel Information
MBLU 100/ / 20/ / 30/ /   Primary Use 100%   Use Type   Internal ID 1   Work In Prog   Living Area 2020
Location 1 N MAIN ST ST W UNIT   Total Assess $420,000   Land Acres 1   Std Unv/Gba $420,000

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Status Area

The Status Area of Vision 8 displays important information about the database you care currently logged into. For example, it will indicate if the current database currently has a **Value Freeze On**.
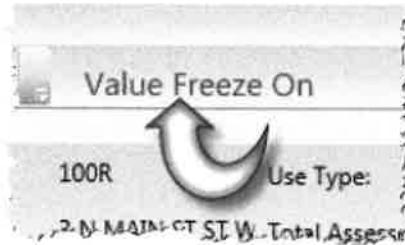
Also, it will indicate what Mode of Operation you are using.

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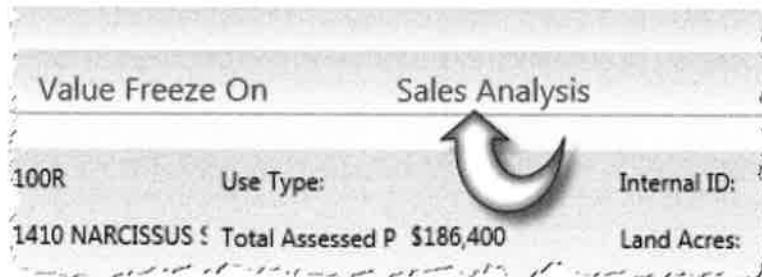
Track Changes

This document will familiarize the user with enabling Track Changes in Vision 8.

The **Track Changes** check box is located in the bottom left of all screens in Vision 8.
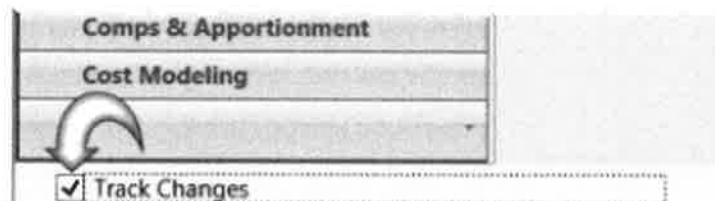
Clicking the Track Changes check box when adding or changing a property means that the value of the property being described has increased because of new construction or physical improvements to the property rather than simply an increase in the real estate market prices. Typically, you want to track the value change and assign a code to the dollar difference. However, you can also track property changes that do not attribute value.

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How to Save Changes

The purpose of this document is to explain the methods of saving changes in the Vision 8 application.

1. The first method if saving changes us utilizing the **Save Changes** icon 💾 . You may click this at any time from the top navigation tree.
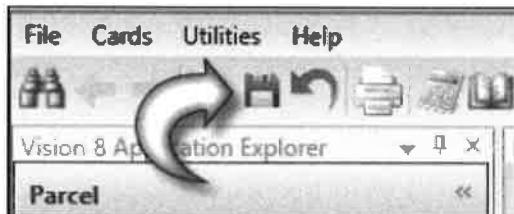
ⓘ A **Status** box will briefly appear stating the **Save Completed**.

2. The second method is to bring up the **Parcel Search**. This can be accomplished though clicking the **Parcel Search** icon 🔍 or by pressing the **F2** key.

If you opt to save by bringing up parcel search, Vision will request confirmation with a **Save Data Changes** screen. Click **Yes** to save your changes.
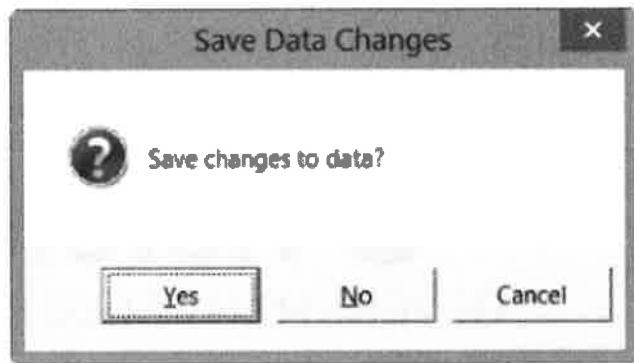
Save Data Changes ✕

? Save changes to data?

[Yes]   [No]   [Cancel]

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How to Create a Dashboard

The purpose of this document is to familiarize the user with the view of the Vision 8 Dashboard.

The **Dashboard** was created for the user to design their own viewing page by selecting Vision screens of their choice, which are needed for review or for making modifications. This saves the user time by scrolling down in place of selecting screens from the tree. You may create as many Screen Groups as necessary.

First, be sure to have a parcel opened in Vision so that the Dashboard options discussed are available.

1. Click on **Dashboard Setup** from the **Summary Review Screen** sub menu, located in the tree on the left hand side of the screen.

2. This will open the **Dashboard** Screen.

3. Click **Add**.
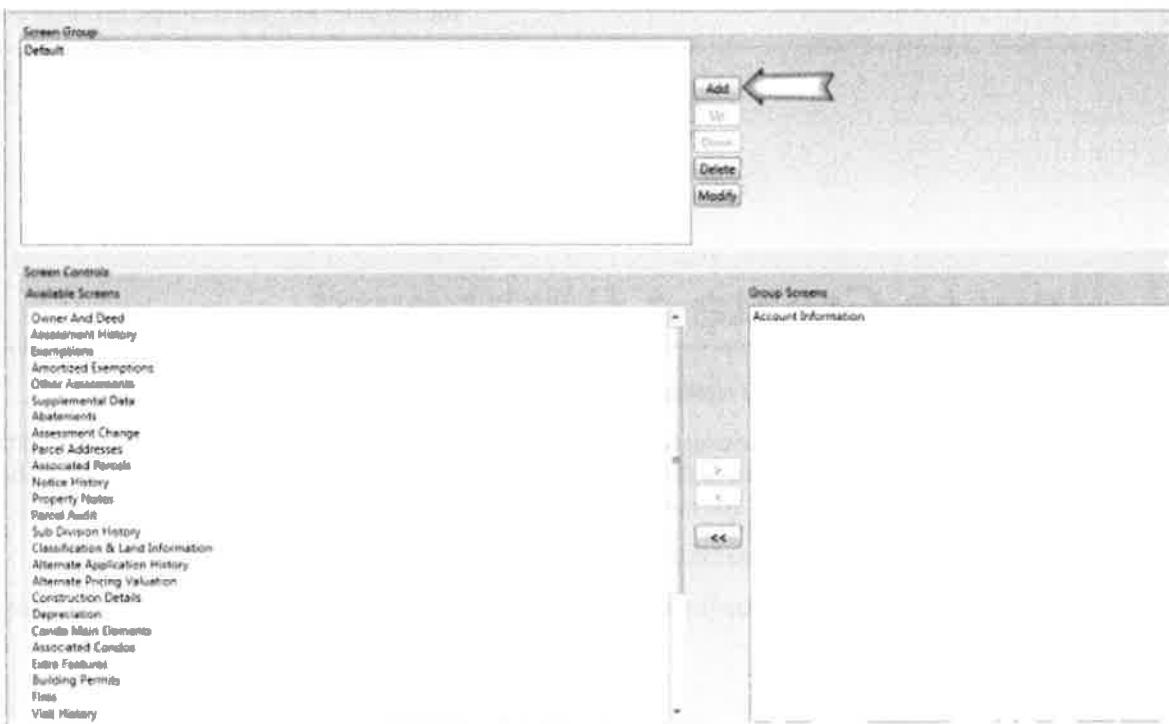
4. Enter a **Group Name** and Click **OK**.
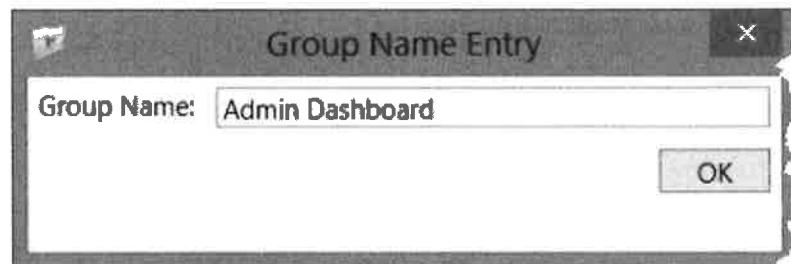
5. The Group Name appears in the **Screen Group** section and the **Screen Controls** displays the Available Screens.
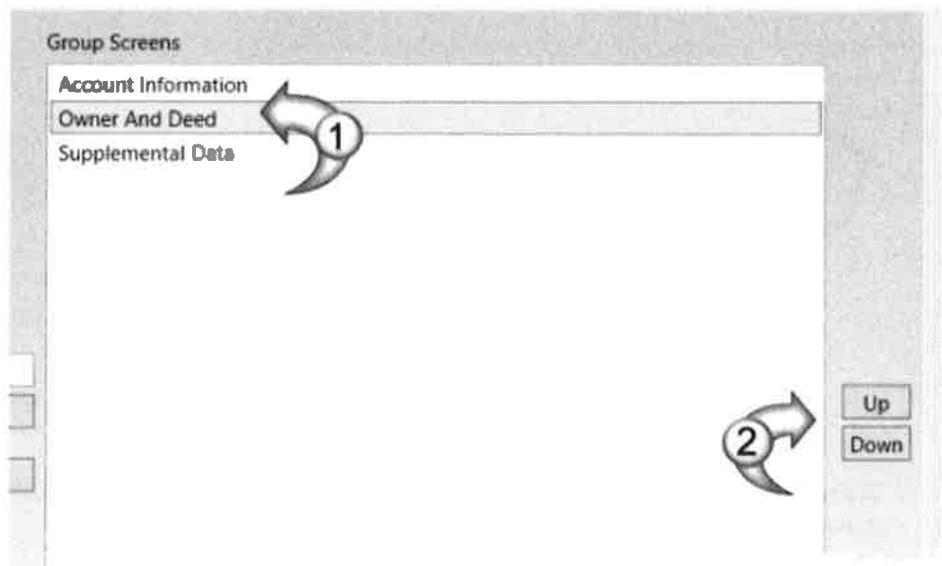
8. Once all the desired screens have been added to the **Group Screens** section, click on **Dashboard** from the **Summary Review Screen** sub menu, located in the tree on the left hand side of the screen.
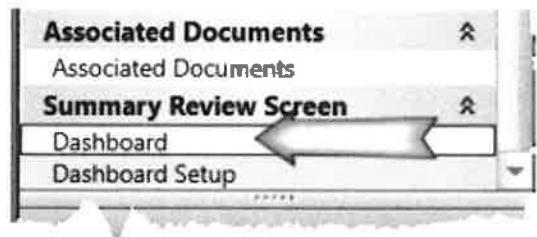
9. The newly created Group Name appears in the upper left corner of the **Dashboard** and all screens that were selected in the **Dashboard Setup** will be displayed for the user to view and make edits. Simply scroll down to view the next screen.

> You may make any changes that are necessary on the **Dashboard** and the updates will be made directly to the database.

Screen 1

6. Under the Screen Controls section, select a Screen and click the single right arrow (>), which will add the screen to the **Group Screens** section.

i   If a screen was moved to the **Group Screens** in error, highlight it and click the single left arrow to remove it from that section. The double arrows will remove all the screens from the Group Screens and restore them to the Available Screens section.
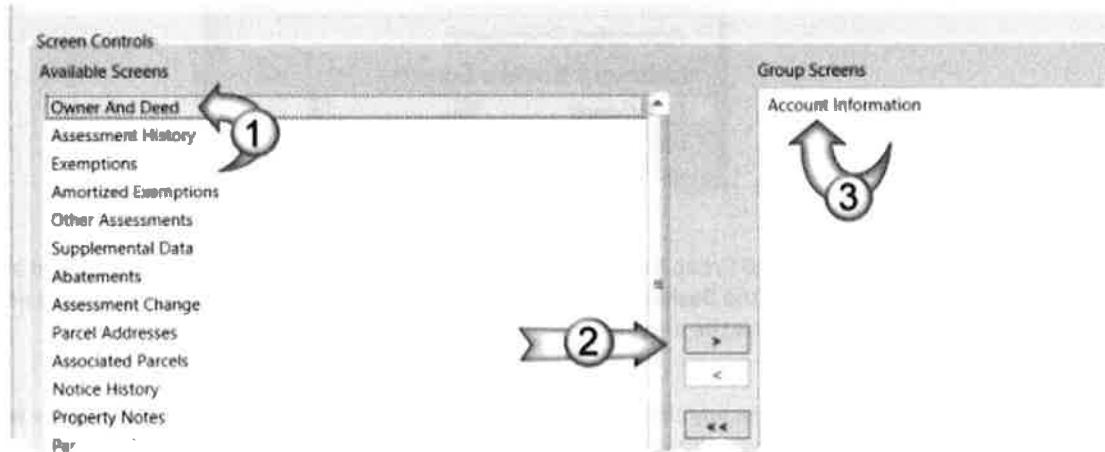
7. To rearrange the order the screens will be viewed, select the screen and click the **Down** button.

i   You may also move the screen up, by clicking the **Up** button.

Screen 2

FC	Legal Owner	Owner Full Name	Book	Page	Date of Transfer	Q/U	Vac/Imp	Sale Price	VC	Record Date	Reference Num
C	Y	MICHAEL MILLER MARY MILLER	295	95	5/13/2014	Q	I	$325,000.00	01	5/14/2014	36548
C	N	JOSEPH JONES JANE JONES	421	155	3/21/2011	Q	I	$0.00	01	3/22/2011	6854
C	N	JOSEPH JONES	421	154	3/21/2011	Q	I	$284,500.00	01	3/22/2011	6855
C	N	SARAH SMITH JACOB JOHNSON	123	320	10/8/2005	Q	I	$250,000.00	01	10/9/2005	1484

Add Sale Delete Sale View Owner(S) Number of Owners: 2

Comp Snapshot ☑ Replace Existing Create Comp Snapshot

Screen 3

10. Click on the **save changes icon** 🖫 or the **F2 key** to save your changes.

If you pressed **the F2 key**, Vision will ask if you want to save changes. Click Yes.
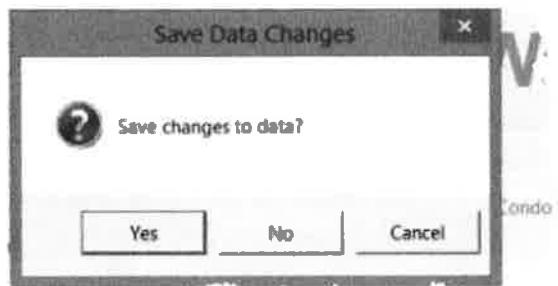
Save Data Changes

Save changes to data?

Yes   No   Cancel

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Navigation Tips

This document will provide best practices for navigating through the Vision 8 software.

When editing or adding information:

- Move between fields in sequence, by using the **<Tab>** key, the **keyboard arrow keys**, or on occasion, the **<Enter>** key. Each action records the entry and highlights the next sequential field for input.

- Move among fields randomly by clicking in a field.

- In a list, scroll up and down by using the **<PgUp>** or **<PgDn>** keys, or the **<<** or **>>** buttons if they are provided.

Anytime:

- Move between screens or sub-screens in sequence, by using the **<F3>** key.

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Data Entry Tips

This document will provide general best practices for entering data into the Vision 8 software.

When entering data keep these tips in mind:

1. When typing information, always be consistent. For example, if your office keeps its records in the format last name, first name, then retain that format when entering data in the **Owner's Name** field.

> Owner Information
> Owner Full Name
>
> NELSON, THOMAS PAUL
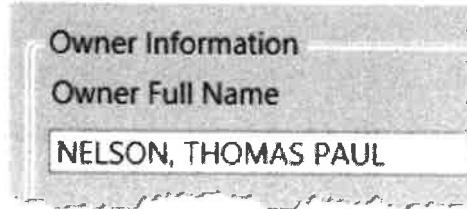
2. To accept an entry, press the **<Enter>** key. Doing so will accept that entry. To accept and advance the cursor to the next field, press the **<Tab>** key. The highlight moves to the next entry field, until the section is completed.

Bedrooms	05
Total Rooms	01
Full Baths	
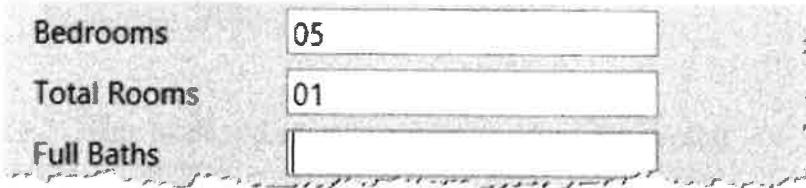
3. To replace or change data, type it into the highlighted field. The system will automatically replace the old information.

Unit   102

4. To change data in a grid, type the new data into the appropriate field and then press the **<Enter>** key. If available to that field, you can also double-click to bring up a pick list to select from. Click the item from the pick list and press the **<Enter>** key.

Legal Area   43560

Primary Use   100R: SFD - Urban Res

100R: SFD - Urban Res
100T: SFD - Urban MH
100U: SFD - Urban Condo
100V: SFD - Urban Vacant
200C: SFD - Suburban - Comm
200E: SFD - Suburban - Exempt
200F: SFD - Suburban - Farm
200R: SFD - Suburban
200T: SFD - Suburban - MH
0001: Defa 200U: SFD - Suburban - Condo
200V: SFD - Suburban - Vac
300C: Dwelling - Multi - Comm
300E: Dwelling - Multi - Exempt
ondo Main   200D: Dwelling - Multi Farm
ircel id

5. To erase information, click on the field or highlight the value to be deleted by clicking and dragging your mouse to select and press the **<Delete>** key.

PIN   100506002

6. Copy and Paste by highlighting data to be copied, then, if using the mouse, click the right button and choose the **Copy** option form the menu provided. On the keyboard, select (**Ctrl + C**). Click in the field to copy to. If using a mouse, click the right button and select **Paste** from the menu provided. Using the keyboard, select (**Ctrl + V**) to paste data.
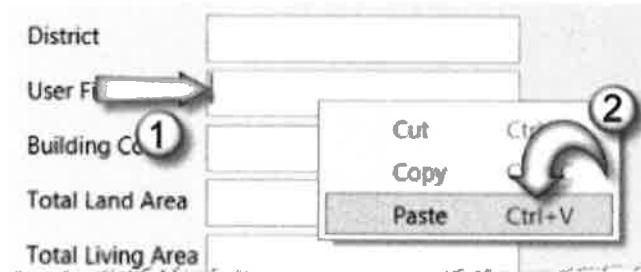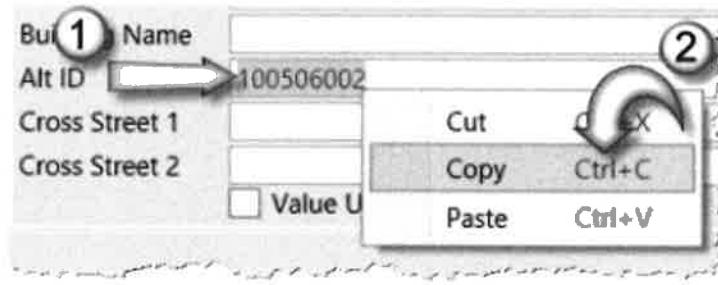
Bui 1 Name
Alt ID   100506002   2
Cross Street 1
                              Cut
Cross Street 2
                              Copy   Ctrl+C
              Value U
                              Paste   Ctrl+V

District
User Fi
                              Cut
Building C 1
                              Copy
Total Land Area
                              Paste   Ctrl+V
Total Living Area

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Table Entry Tips

This document will provide best practices for entering data into Tables in the Vision 8 software. All table maintenance entry screens allow you to add, change or delete items in the same way.

To find an item:

1. Scroll up and down a list by using the up and down arrow keys, **<PgUp>** or **<PgDn>** keys, or the **<<** or **>>** buttons if they are provided.

To change or delete an existing entry:

1. Highlight a field or line.

2. Type over the highlighted information, or press the **<Delete>** key to erase the information. If you highlight a line and press <Delete>, a **Delete Record** notice will pop-up and indicate that "You have selected X record(s) for deleting." You are then given the option to "Choose Yes to delete the record, or No to exit." Selecting No will simply close the notice window and leave the record as is.
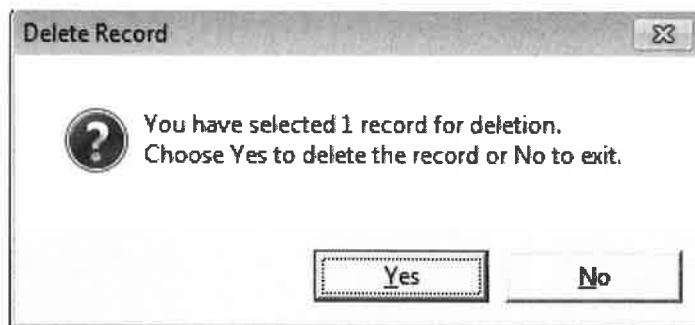
3. Press the **<Tab>** or **the left arrow key** to move from field to field in the line.

Warning: Before you delete an entry, you must be absolutely sure that the code is NOT being used on ANY parcel. If you delete an entry that is being used on a parcel you may have unforeseen calculation issues. Please call Customer Support if you are unsure.

To add a new item to a table:

1. Scroll to the top of the list and click the icon
2. Navigate to the first field in newly created blank line.
3. Type data in each field, pressing the **<Tab>** or **arrow** key to accept the additions and move the cursor from field to field.
4. Continue until all relevant fields are complete for that line.
5. Click Apply in the lower left-hand section of the screen to save all table changes.

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How to Select Data and Make Changes

This document will walk the user through standard processes for entering & editing data in Vision 8.

Common Selection Options

Choosing a specific field on a screen indicates to the system that you would like edit that field. The current information becomes highlighted when you choose the field. If there is no data currently in the field, only the cursor will show in the field.

To select a field:

1. Repeatedly press the **<Enter>** or **<Tab>** key until the cursor lands on the desired field.

2. Use the mouse to select the desired field by using **left-click**.

Select an entire line in a list or table:

1. Scroll up and down in a list by using the **Up** and **Down** arrow keys, **<PgUp>** and **<PgDn>** keys, or the scroll bars on the screen if they are provided.

2. Use the mouse to click the **grayed** arrow on the left of the desired line. The line will highlight and the arrow will turn black, as in the example below.

To place/remove a mark in a checkbox:

1. Repeatedly press the **<Enter>** or **<Tab>** key until the cursor moves to and highlights the desired check box.

2. Once you are on the checkbox, press the **<Spacebar>** to check the box. Press it again to clear the check mark.

3. Alternatively, use the mouse to click the desired box by using **left-click**. Click it again to clear the check mark.

To select a "radio button" option:

- Only **one** "radio button" can be selected at any one time.

- **Clicking** a radio button turns it **on**.

- **Clicking** a **different** button turns the **new one on** and the **first one off** automatically.

- In the example below, the Column View Option can either be Show Parcel Data OR Show all Table Data, the Show Preview Report Columns and Data OR Show Selected Report Columns and Data can be selected, and the Report Type may only be Tabular OR Matrix.
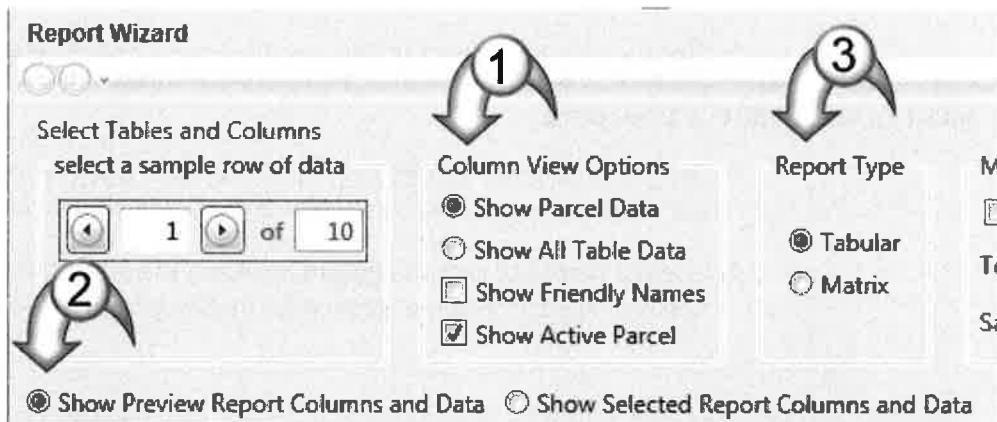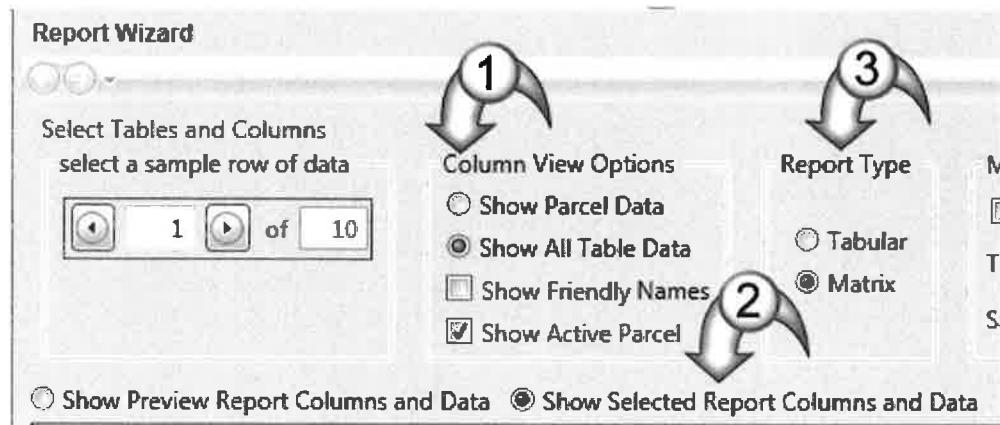
Drop-Down List:

Only **one** item in a **drop-down list** can be selected. When the drop-down list is **inactive** only a **single value** item will appear. When activated, it displays a drop-down list of values for a user to select from.

You can navigate to find their desired selection within a drop-down list by:

- Using a **scrollbar**

- Pressing the keyboard navigation keys (**up-arrow, down-arrow , <PgUp>** and **<PgDn>**)

- Entering at least **one character** from the **keyboard** - in the case of a lengthy but ordered list, this strategy can propel one to the general section of entries beginning with the selected character.