NCVTS

North Carolina Vehicle Tax System

Training Guide

► Your Guide to *Understanding* NCVTS

Table of Contents

Key

The icons appearing in the margins and main body of this training guide are defined below.

Best Practice. Provides suggestions and recommendations of how to make the best use of the North Carolina Vehicle Tax System (NCVTS).

Information. Provides relevant information that supplements the content in the adjacent text.

Reference. Tells you where to go to find additional information on a topic.

Note. Provides information related to the training materials or exercises.

Set the Stage. Provides a realistic scenario for the exercise that follows.

Tips and Tricks. Provides additional information to make the most efficient use of NCVTS.

Warning. Provides valuable Dos and Don'ts and related information critical to working in NCVTS.

Special Thanks

Creation of the NCVTS County User Training Course was truly a team effort. We would like to thank the following people for giving us their time and sharing their expertise.

Representing	Individuals	
NC DOR	Dave Duty David Baker Pete Rodda	Robin Rogers Tina Stone Travis Isaacs
NC DOT	Carol Bennett	Deanna Oden
NC Counties	Angie Cook Betsy Cummings Brenda Riley Chip Main Cindy Lowry Cindy Shumate David Taylor Deanna Cochran Debra Raynor Donna Martin Frances Wilson Greg French Jackie Morrow Jazmin McGee Jennifer Baker Jennifer Chandler Jennifer Hudson Judy Ballard Judy Hickman Kim Lemons Leigh Haney	Lesli Brown Linda Davis Linda Thomas Lisa Little Lucinda Ambrose Marie Jackson Mark Edney Melissa Austin Myra Whitley Phyllis Richards Pretena Brydson-Ingram Sandra Napier Sharon Powell Shavonda McLean Sherri Blackwell Sherry Roberts Tabitha Lewis Teresa Buff Terri Richardson Tony Walters Veronica Walker
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MODULE 1: FOUNDATION

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Chapter 1: NCVTS Overview

The NCVTS Overview chapter establishes a solid foundation for learning NCVTS. The chapter presents the business needs/purpose of NCVTS as well as flow diagrams of data upload, processing, and output.

Objectives

- Understand the business purpose of NCVTS
- Understand the flow of data in NCVTS

The Business Purpose of NCVTS

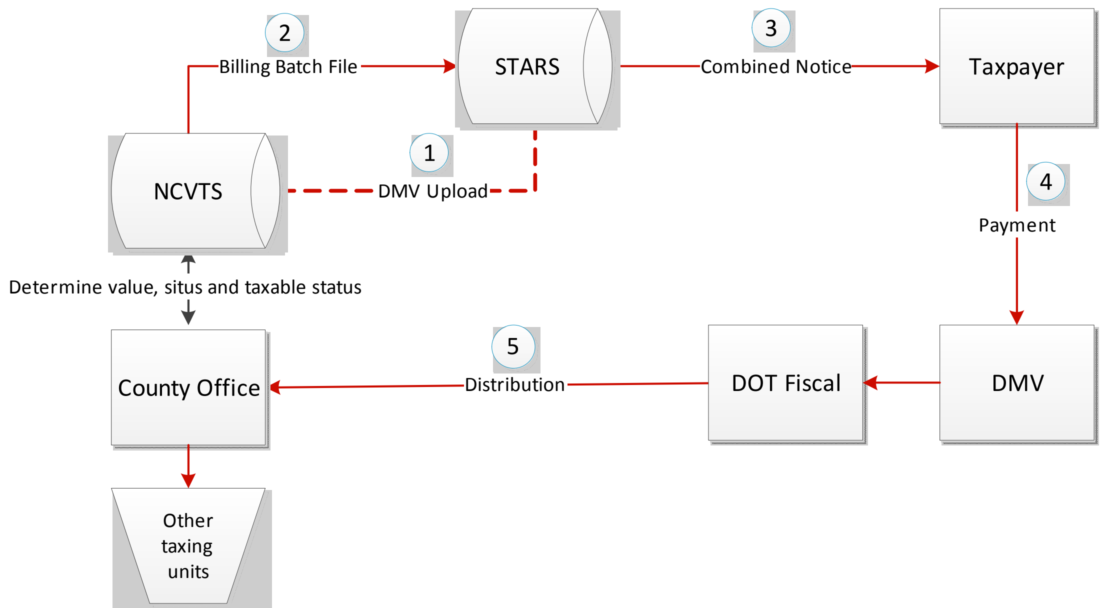
The North Carolina Vehicle Tax System (NCVTS) serves as the collection authority for all 100 local governments of North Carolina. NCVTS integrates with existing systems (e.g. STARS) and is responsible for determining vehicle value, verifying situs address, applying tax districts, and calculating vehicle taxes.

Collection rates on registered vehicles continue to drop because taxpayers wait to pay their taxes until they absolutely need a tag. House Bill 1779 that was ratified in 2005, Session Law 2005-294, was signed into law to modify the collection process for vehicle property taxes and registration fees on registered motor vehicles in the State. The bill mandates combining the payment of taxes and registration fees at the time of registration. The law effective date is July 1, 2013. By changing the business process, some of the benefits will include:

- Improving the experience for taxpayers by providing additional payment options and single bill for registration and vehicle property tax
- Increasing revenue for the counties
- Improving on time tax vehicle property collection for the counties

Data Flows

Business Flow



Each month the North Carolina Department of Motor Vehicles (NCDMV) identifies the vehicles that are up for registration/renewal. On the last Saturday of each month, these records are sent by the DMV from the State Title and Registration System (STARS) to NCVTS. The records will go through a series of system validations. County users will determine value, situs and taxable status of the vehicles. At the end of each month, NCVTS will send the billing batch file to STARS. Tax bills are combined with the vehicle registration on the invitation to renew and DMV will mail and collect the taxes. DMV will distribute local tax revenue to the counties, who will in turn distribute to the other taxing units.

STARS: The NCDMV uses STARS (State Titling and Registration System) to track vehicle registration and renewals in North Carolina. There are many occasions where information is passed between STARS and NCVTS during the course of renewals, billing and collections.

Situs Address: The physical street address where a vehicle resides. The dictionary definition of situs is "the place where something exists."

DMV Upload: Each month, the Department of Motor Vehicles (DMV) sends the full list of vehicle records up for renewal to NCVTS. This monthly process is called the DMV Upload.

Abstract:
Each month, the Department of Motor Vehicles sends information to NCVTS about vehicles up for registration renewal. The information for a single vehicle is called an Abstract. A single vehicle will have a separate abstract every year.

Queue:
A set of records that share common information and require work and/or review by county personnel. For example, abstracts that contain notes for review are accessible from a single "queue" called the NOTES queue.

RFB (Ready for Bill):
Abstracts that are sent from the DMV through the DMV Upload process that do not require additional review by anyone in your county, are automatically marked with a status of RFB, or Ready for Bill.

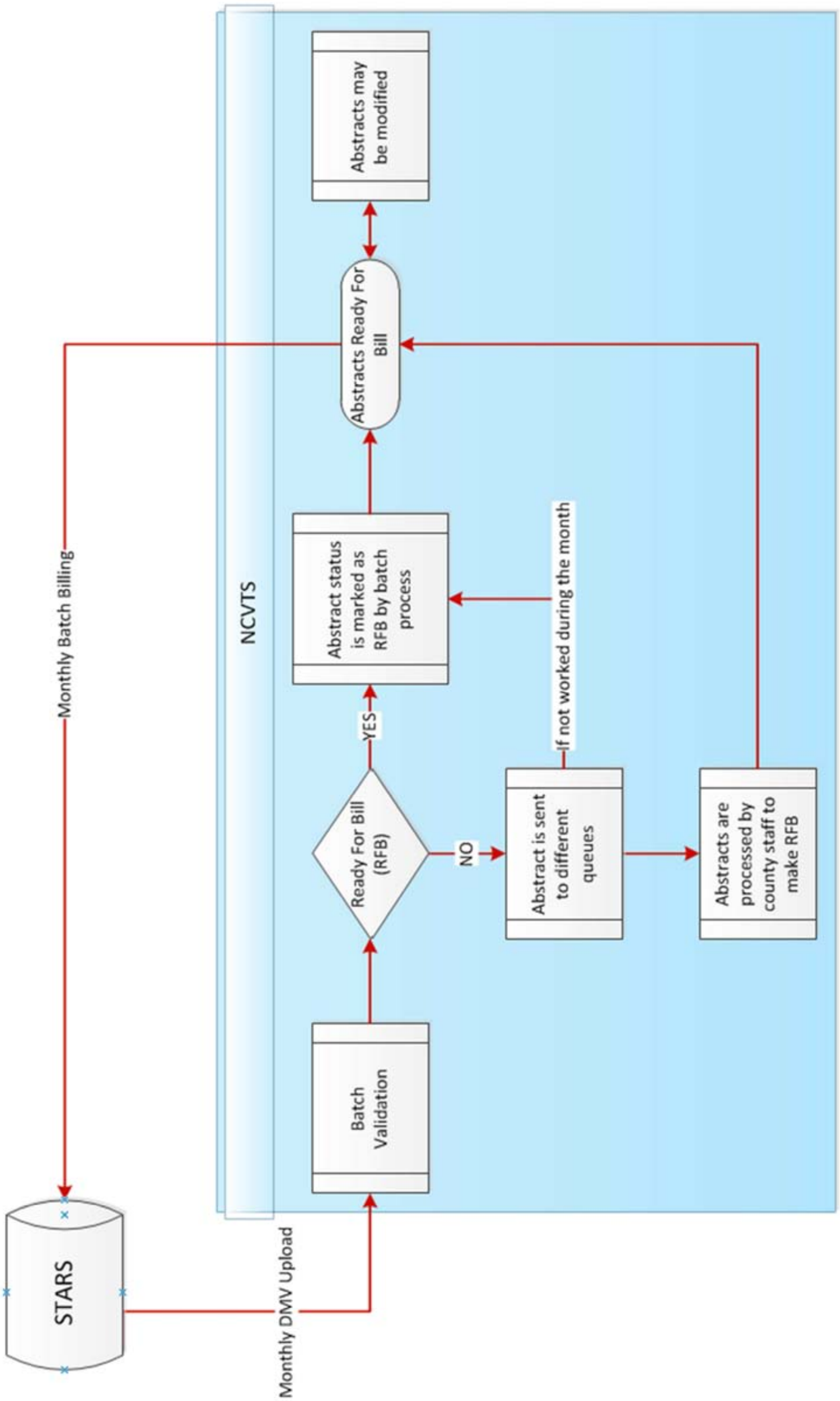
NCVTS Flow

Assessment

Before data are received in NCVTS each month, the data will go through the vehicle valuation process. A value will be assigned to the vehicle if a match can be found. Once data are received in NCVTS, validations will occur to determine if abstracts are ready for billing. If an abstract is not ready for billing, someone will need to work the abstract from a queue to get it ready for billing. Once an abstract is cleared from the queue, the system will set the status to RFB (Ready for Bill). If for some reason abstracts are not worked during the month, they will be processed with default data. For example, taxes will be calculated on the DOR Median value for abstracts in the NO_VALUE queue.

Each month the Batch Billing Process will create bills for the abstracts with a status of Ready for Bill and send to STARS.

NCVTS Flow (continued)

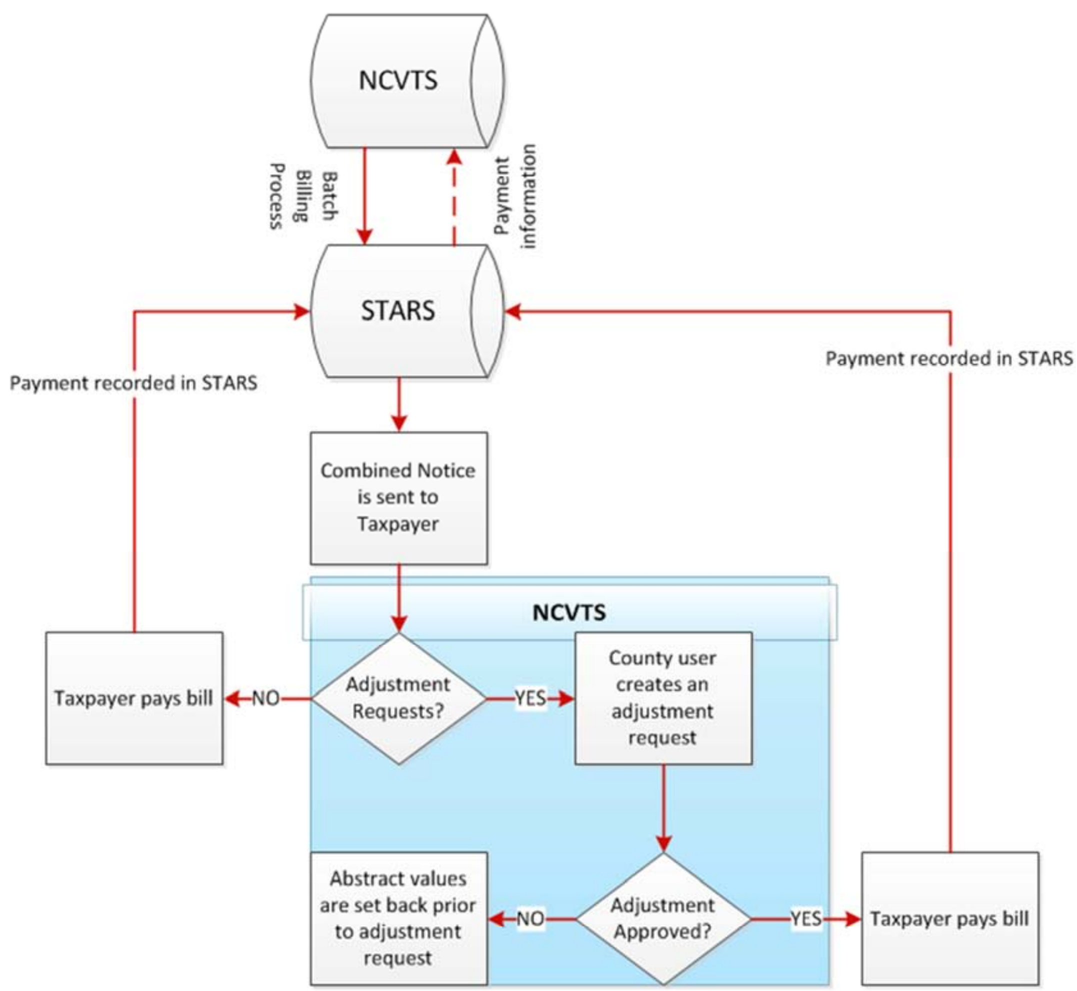


Valuation Process:
When the DMV Upload occurs, each vehicle is matched with a value based on the information from TEC.

NCVTS Flow (continued)

Billing

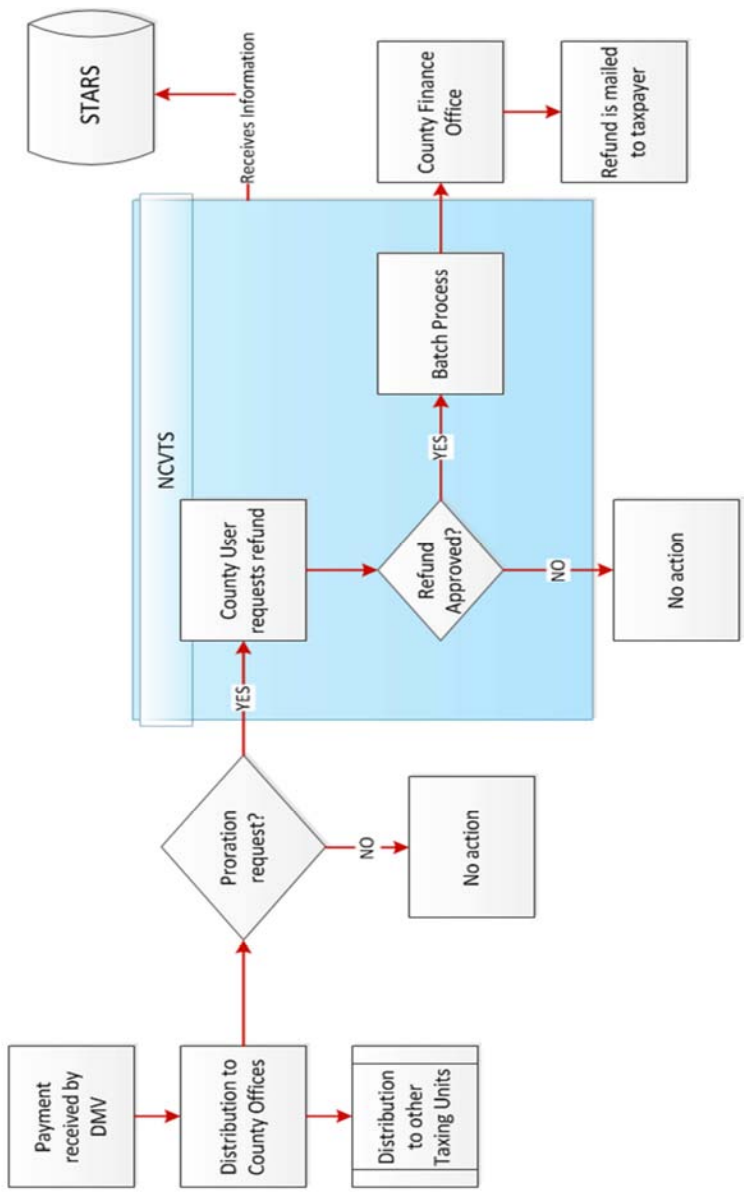
The tax bill and the vehicle registration will be combined into one notice called the invitation to renew and STARS initiates the printing and mailing process. When a taxpayer pays their bill, the payment is recorded in STARS and the information is sent to NCVTS. A taxpayer may request an adjustment to their bill for various reasons. As a county user, you will create an adjustment request in NCVTS. Once the adjustment is approved, the taxpayer will be able to pay their bill for their adjustment amount. If the adjustment is denied, the values are reset to their original value in the system and the bill remains the same.



NCVTS Flow (continued)

Payment

Taxpayers may pay their bill using a variety of methods, including online payment, mailing in a check, or walking into an LPA office. All payments are received by DMV and will be distributed to the counties in a batch process. NCVTS receives the payment information. The counties will distribute to the other taxing units in their county. Taxpayers may request their bill be prorated for various reasons. Refund requests are initiated by the county appraiser using NCVTS. If the refund is approved, the county office will process the refund and mail to the taxpayer.



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Chapter 2: Getting Started

The Getting Started chapter presents high-level concepts to users that allow them to access, and navigate, and search for records in NCVTS.

Objectives

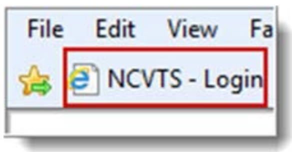
- Access NCVTS
- Understand a web page and functionality
- Understand user permissions
- Navigate NCVTS
- Search for Records in NCVTS

Accessing NCVTS

NCID is the standard identity management and access service provided to state, local, business, and individual users. NCID provides a high degree of security and access control to real-time resources. To access NCVTS, first you must obtain your NCID either by self-registering or if required, request the NCID through a Delegated Administrator for your county.

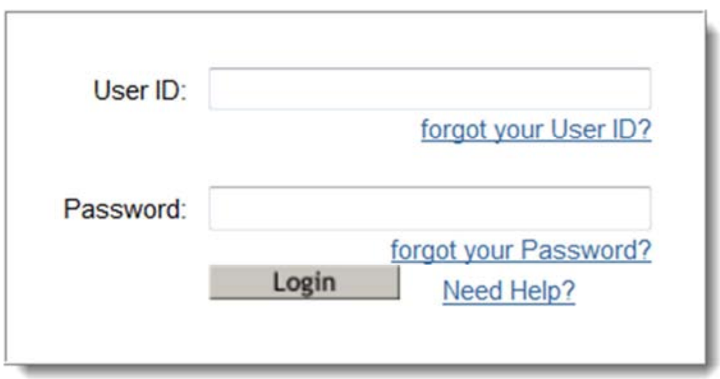
Exercise Steps

From the Favorites Menu Bar of Internet Explorer, click the **NCVTS-Login** link.



The NCID login page displays.

Enter your assigned **UserID** and **Password**, then click the **Login** button.



The NCVTS Main Menu page displays.

Once you receive your NCID and password, an NCVTS user with administrator permissions will need to create your account in NCVTS.

For training purposes only, a training NCID will be provided to you to use ONLY during this training class. If you need instructions on how to obtain your personal NCID, please ask instructor.

If you are logged out of the system at any time during the training session, just click the NCVTS – Login link to login.

Understanding User Permissions

County Administrators assign and manage the role and rights of each user. User rights are assigned to a role. Roles determine the permissions the user has in the system.

Navigating NCVTS

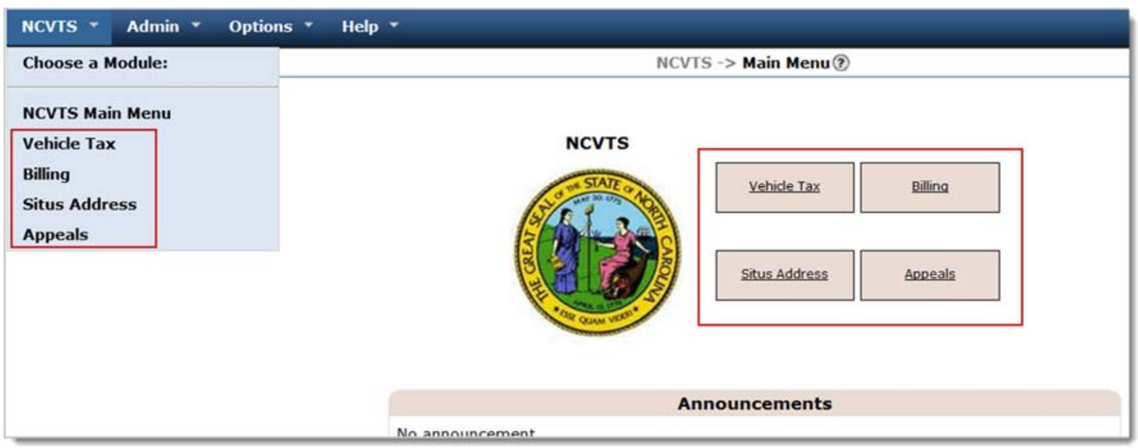
Once logged into NCID, the NCVTS Main Menu page displays. From this page, State and County Administrators will use the Admin menu to access specific activities related to their role. We will discuss the County Administrator role and user management later in this class. For most users, to begin working in NCVTS, you will need to navigate to a search page.

There are 3 different ways you can navigate to a search page from the Main Menu page:

- NCVTS Main Menu
- Specific search links in center of page
- Search link in top right corner

To navigate to specific search criteria, you can select one of the links located in the center of the Main Menu page or navigate to the NCVTS Menu and select your option.

The Announcements section is maintained by the Department of Revenue. Look for the following types of announcements in this section:
- Depreciation Schedule changes
- Law changes
- Updates on NCVTS enhancements
- Information on new ad hoc reports

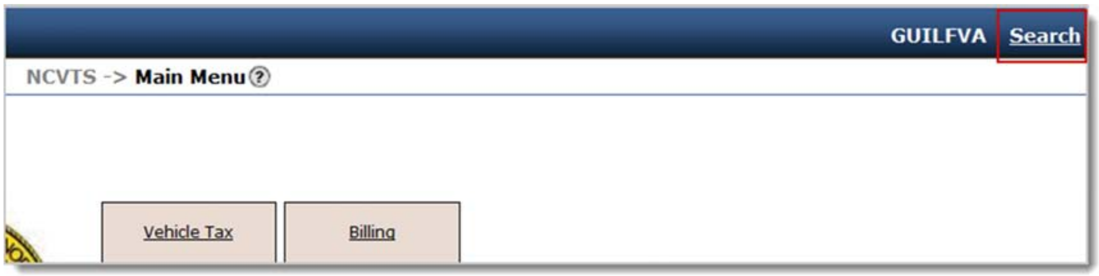


The easiest way to begin using the system is to use the **Search** link at the top right corner of the page. Clicking on the **Search** link will direct you to the **Abstract Search Page** which also serves as the home page while working in the system.

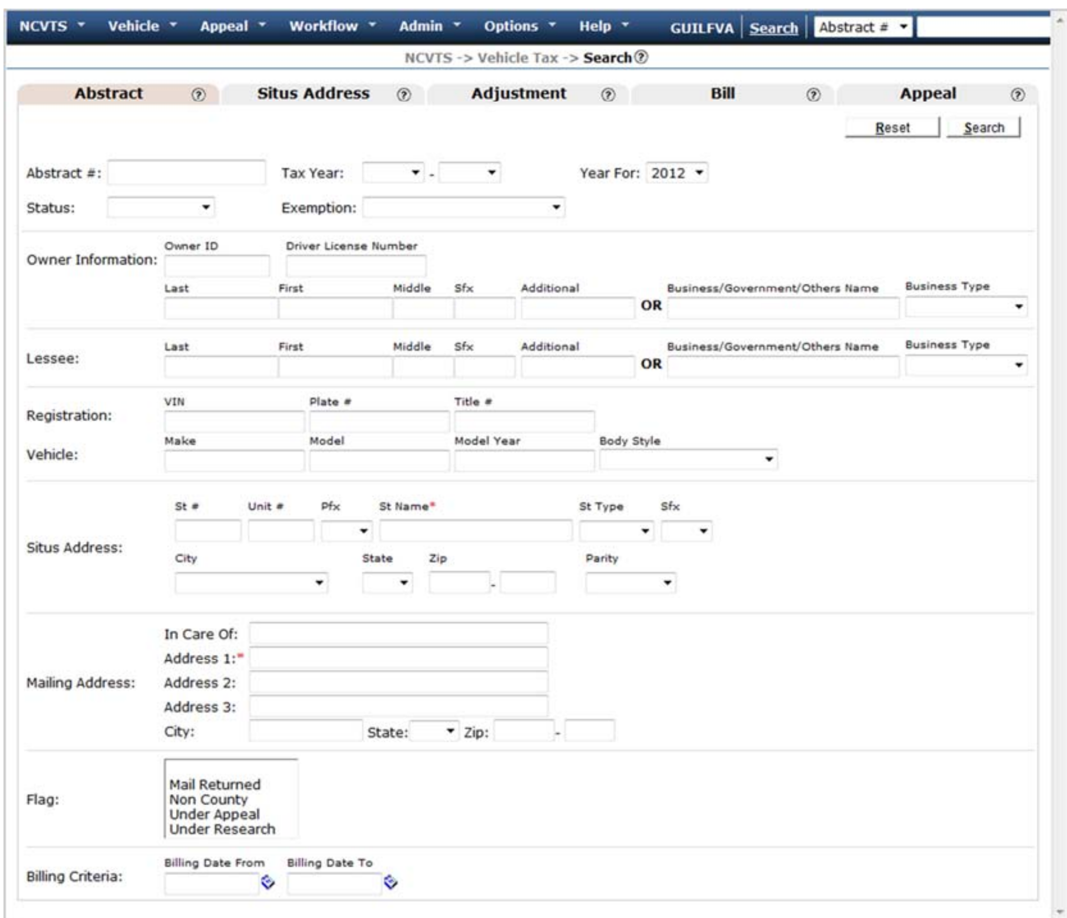
Navigating NCVTS (continued)

Exercise Steps

1. Click the **Search** link.



The Abstract Search page displays.



The Menu options change from the Main Menu page. We will cover the menu items throughout this class.

Understanding a Web Page and Functionality

There are a few common features and functionalities of a web page that are helpful to understand prior to navigating in the NCVTS.

Back Button (Do Not Use) - When navigating throughout the site do not use the back button located in your web browser. Navigate throughout the system using the functionality built into the system.

Window Scroll Bar - Sometimes the information or data entry fields in the NCVTS application take up more space than is viewable on your PC monitor. When this happens, you will see a scroll bar on the right hand side of the application window. This will allow you to view the additional information by scrolling the bar up or down.

Hyperlink – A hyperlink (or link) is a word or group of words that you can click on to jump to another page.

Breadcrumbs – A navigation aid that allows you to keep track of your location within the system.

Close (Do Not Use) – For security purposes, do NOT use the Close (X) button in the top right of the browser window. Always use the Logout menu option to exit the NCVTS application, as this correctly ends your session.

Searching for Records in NCVTS

When searching for vehicle records there are two basic types of search:

- Quick search
- Advanced search

Use the quick search function to find a vehicle abstract record based on minimal information. For example, abstract, title number, bill, or license plate number and tax year. Quick search finds one record.

Use the advanced search function to search abstracts based on a variety of criteria, including:

- Abstract
- Situs Address
- Adjustment
- Bill
- Appeal

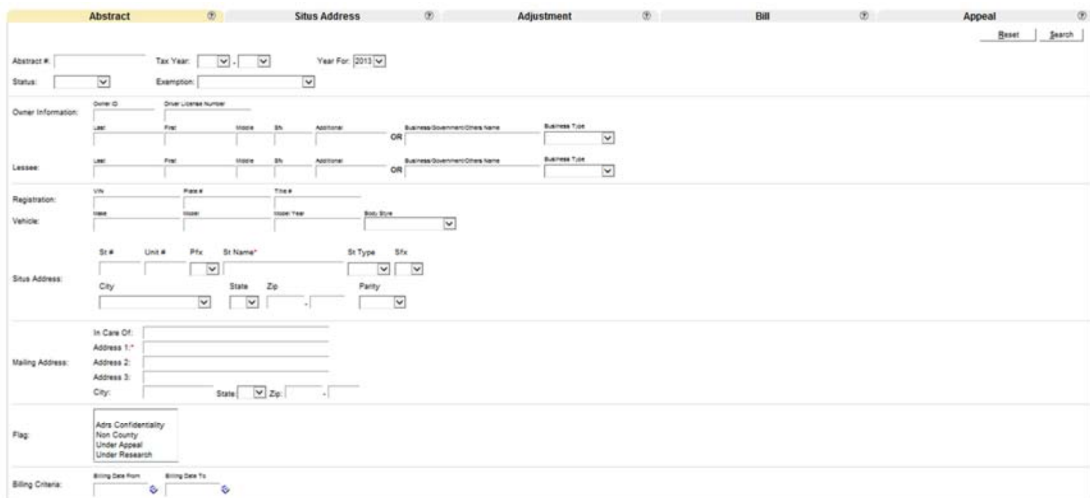
When performing an abstract search, you do not need to enter the preceding zeros of the abstract #.

Using the Advanced Search

There are 5 tabs on the search screen which allows you to enter additional criteria when searching for abstracts. To change the search criteria, simply click on the tab name to display the criteria for the category.

Abstract Search Tab

Users can search for abstracts by criteria such as owner name, address, billing criteria and flags.



Situs Address Search Tab

Users can search for abstracts by providing situs address details.

Adjustment Search Tab

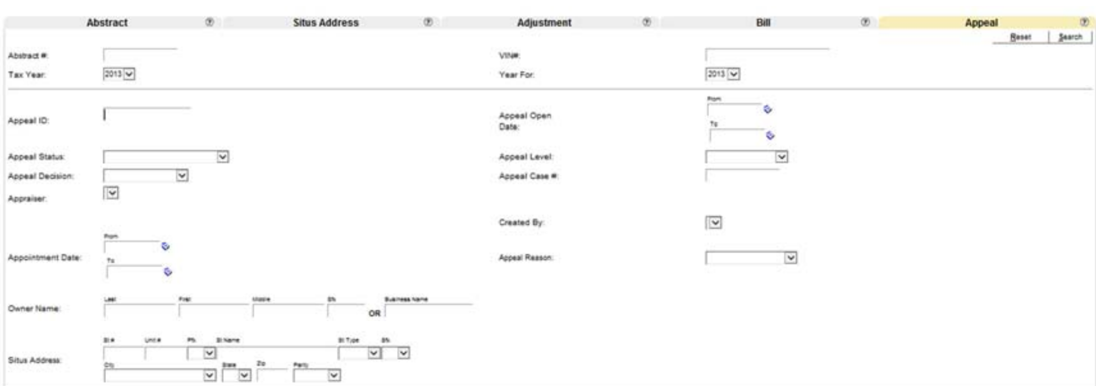
Users can search for adjustments based on specified criteria. You may review adjustment transactions and access the corresponding abstract.

Bill Search Tab

Users can search for vehicle tax bills to view or take action.

Appeal Search Tab

If your county uses the appeal process, you may enter criteria to search for pre-existing appeals.



Using the Quick Search

To perform a Quick Search, enter the abstract number and the tax year into the Quick Search text box located in the main menu navigation bar. Click Go to initiate the search.

Exercise Steps

1. Select the **Plate #** option from the Quick Search drop-down list, and then type the **Plate #** in the field.
2. Click **Go.**

The system executes a search based on the specific abstract number and tax year and displays the Maintain Vehicle Abstract page.

Summary & Review

Challenge Exercise

How can you go back where you started in NCVTS without using the back button?

____

____

Name three types of quick searches?

1. ____

2. ____

3. ____

List two types of Advanced Searches?

1. ____

2. ____

What two browser buttons should you not use when logged into NCVTS?

1. ____

2. ____

Chapter 3: Abstract Overview

The Abstract Overview chapter provides a baseline for future use of abstracts. The chapter includes conceptual information on abstract records and how valuations are assigned as well as a comprehensive review of the layout of and information presented in an abstract vehicle record. Attendees will receive hands-on practice in navigating, editing, and saving an abstract.

Objectives

- Understand abstract records
- Understand the valuation process
- Search for abstract records
- Locate information on an abstract
- Edit an abstract
- Add notes to an abstract

Abstract Records

Each month the NCDMV identifies the vehicles that are up for registration/renewal. On the last Saturday of each month, these records are sent by the DMV from STARS to NCVTS. As we discussed in the terminology section, these records are referred to as abstracts. They are the core of NCVTS.

When these monthly records come from STARS, approximately 90% of the vehicle records that come into NCVTS each month will be automatically processed and no additional work will be required at the county level.

The remaining 10% or so of abstracts from the DMV upload will have some type of issue that requires review and/or work by county personnel. As you work through these issues and resolve them in NCVTS, STARS is updated in real time.

Searching for Abstract Records

County users can locate any abstract in NCVTS using the Abstract tab on the Search page. This tab offers sets of fields by which users can locate a specific record or set of records.

Each county has loaded at least one year of historical information from their former vehicle tax system into NCVTS.

Sets of Search Fields

- General abstract fields
- Owner information
- Lessee
- Vehicle
- Situs address
- Mailing address
- Flags
- Billing date range

After entering the values you want to search on, clicking the Search button will display the matching records. From the Vehicle Tax Search Results page you can open an abstract, view the history of a single VIN, and display the content of notes added to an abstract.

When searching, certain fields go together. For example, you must enter a Last name if you are using a first name. In other cases, certain fields must be entered in a particular format. For example, the Driver's License Number must include asterisks as placeholders

SET THE STAGE

You need to review the abstract for a vehicle currently up for renewal. Using the search functionality in NCVTS, you locate the record and view the VIN history.

Exercise Steps

1. Click the **Search** link in the upper right of the page.

The Abstract Search page displays.

Searching for Abstract Records (continued)

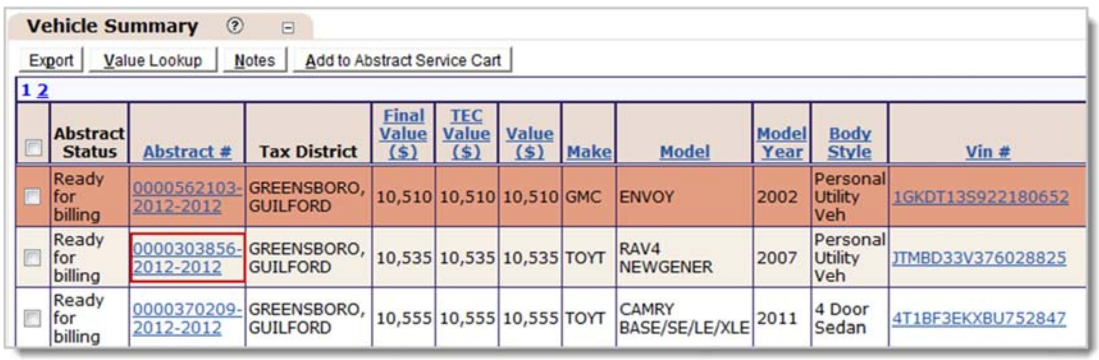
On the Search page, enter or select the following:

Status:	**RFB**
Last (Owner Information):	**JONES**

Click the **Search** button in the upper right of the tab.

The abstracts matching the search values display on the Vehicle Tax Search Results page.

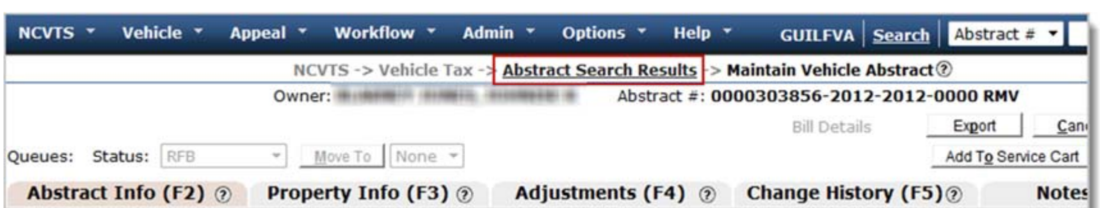
On the Vehicle Tax Search Results page, click an **Abstract # link** to open a record.



	Abstract Status	Abstract #	Tax District	Final Value ($)	TEC Value ($)	Value ($)	Make	Model	Model Year	Body Style	Vin #
	Ready for billing	0000562103-2012-2012	GREENSBORO, GUILFORD	10,510	10,510	10,510	GMC	ENVOY	2002	Personal Utility Veh	1GKDT13S922180652
	Ready for billing	0000303856-2012-2012	GREENSBORO, GUILFORD	10,535	10,535	10,535	TOYT	RAV4 NEWGENER	2007	Personal Utility Veh	JTMBD33V376028825
	Ready for billing	0000370209-2012-2012	GREENSBORO, GUILFORD	10,555	10,555	10,555	TOYT	CAMRY BASE/SE/LE/XLE	2011	4 Door Sedan	4T1BF3EKXBU752847

The Maintain Vehicle Abstract page displays.

Click the **Abstract Search Results** link in the breadcrumbs.



The Vehicle Tax Search Results page displays the previous set of search results.

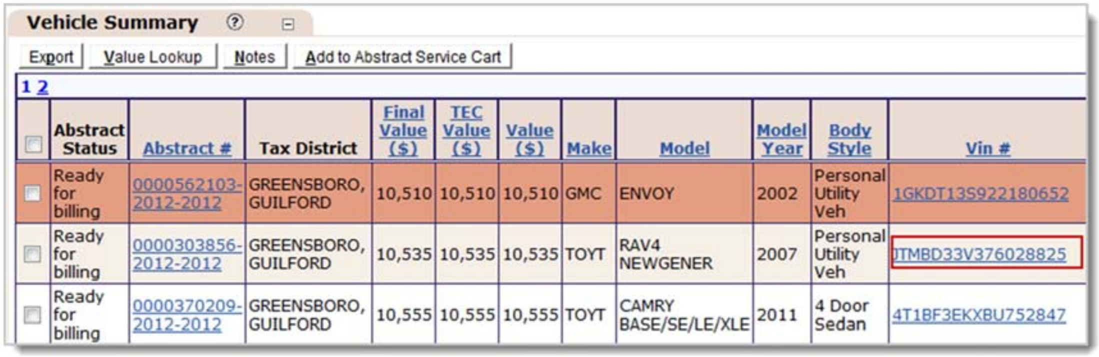
By default, 25 records appear on a single page. To view records on other pages, click the page numbers above the grid.

Do not use the Back button of your browser to return to search results.

Searching for Abstract Records (continued)

The results grid is similar to a spreadsheet. Click a column heading highlighted in blue to sort the rows by that field.

Click a **Vin #** link to view information about a single vehicle's ownership.



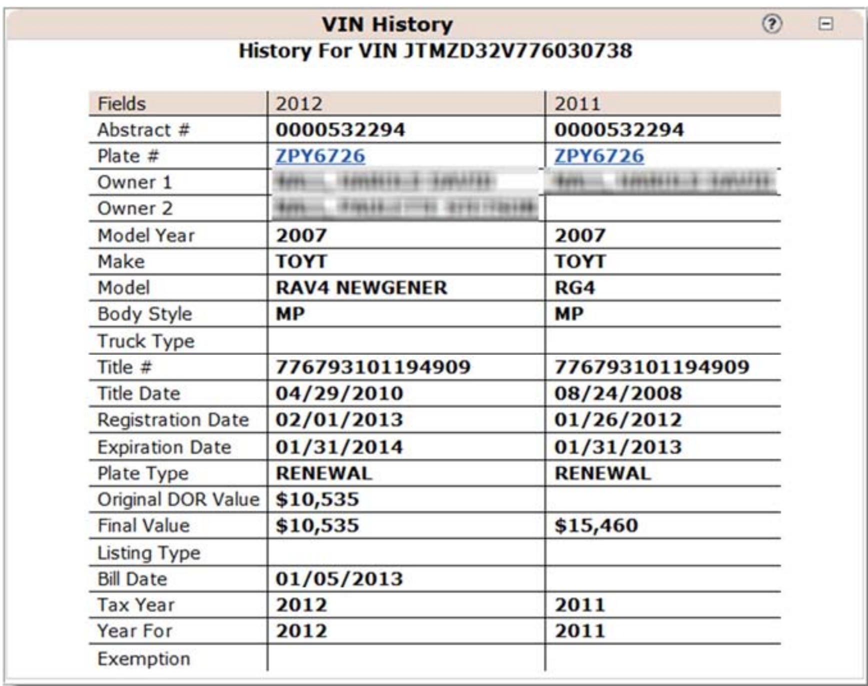
Vehicle Summary

Export | Value Lookup | Notes | Add to Abstract Service Cart

1 2

	Abstract Status	Abstract #	Tax District	Final Value ($)	TEC Value ($)	Value ($)	Make	Model	Model Year	Body Style	Vin #
	Ready for billing	0000562103-2012-2012	GREENSBORO, GUILFORD	10,510	10,510	10,510	GMC	ENVOY	2002	Personal Utility Veh	1GKDT13S922180652
	Ready for billing	0000303856-2012-2012	GREENSBORO, GUILFORD	10,535	10,535	10,535	TOYT	RAV4 NEWGENER	2007	Personal Utility Veh	JTMBD33V376028825
	Ready for billing	0000370209-2012-2012	GREENSBORO, GUILFORD	10,555	10,555	10,555	TOYT	CAMRY BASE/SE/LE/XLE	2011	4 Door Sedan	4T1BF3EKXBU752847

The VIN History window displays.



VIN History

History For VIN JTMZD32V776030738

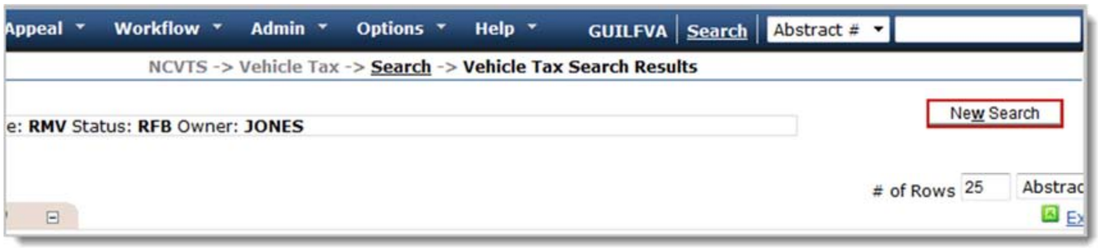
Fields	2012	2011
Abstract #	0000532294	0000532294
Plate #	ZPY6726	ZPY6726
Owner 1	[illegible]	[illegible]
Owner 2	[illegible]	
Model Year	2007	2007
Make	TOYT	TOYT
Model	RAV4 NEWGENER	RG4
Body Style	MP	MP
Truck Type		
Title #	776793101194909	776793101194909
Title Date	04/29/2010	08/24/2008
Registration Date	02/01/2013	01/26/2012
Expiration Date	01/31/2014	01/31/2013
Plate Type	RENEWAL	RENEWAL
Original DOR Value	$10,535	
Final Value	$10,535	$15,460
Listing Type		
Bill Date	01/05/2013	
Tax Year	2012	2011
Year For	2012	2011
Exemption		

Click the **X** in the top right of the window.

The Vehicle Tax Search Results page returns.

Searching for Abstract Records (continued)

Click the **New Search** button at the top of the page.



The Search page displays without the previous search criteria.

Enter other search criteria to search for records of your choosing.

Search Page Buttons

Below is a brief description of the functionality of each button on the Abstract Search page.

Button	Functionality
Export	Use this button to export information on the selected abstracts to a file that you can use to generate letters.
Value Lookup	Use this button to search for the value of a vehicle for the selected abstract.
Notes	Use this button to review and manage notes on a selected abstract. You can select multiple abstracts and add the same note to all using this feature.
Add to Abstract Service Cart	Use this button to include the selected abstracts in a list that is visible only to you.
New Search	Use this button to clear the previous search and start over.
Jump to Row	Use this button to move to the first row that contains information you specify, such as a model or owner.

You can use an asterisk (*) as a wildcard character when searching with text fields. The * is like a placeholder. For example, if you want to search for owners with the last name Johnson or Johnston, enter JOHN* in the Owner field.

We will discuss the buttons on the Abstract Search page as we move through the course.

This functionality is likely to be expanded in the future in the form of standard templates that use the fields from the export to generate various letters.

Exporting Data for Use Outside of NCVTS
INSTRUCTOR DEMONSTRATION ONLY

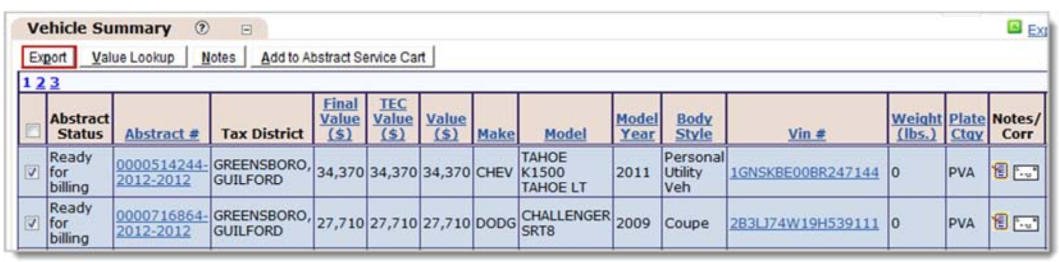
The Export button at the top of the Maintain Abstract Detail page and the Abstract Search page allows you to send information on an abstract to a spreadsheet. This functionality is intended for creating mailings to taxpayers, so the options available for export are based on the information needed for a particular type of correspondence. Once the information is in the spreadsheet, you must use some external process for creating the mailings.

Steps

1. From the Vehicle Tax Search Results page, select the checkbox for each abstract for which you want to export information.

	Abstract Status	Abstract #	Tax District	Final Value ($)	TEC Value ($)	Value ($)	Make	Model	Model Year	Body Style	Vin #	Weight (lbs.)	Plate Ctgy	Notes/ Corr
☑	Ready for billing	0000514244-2012-2012	GREENSBORO, GUILFORD	34,370	34,370	34,370	CHEV	TAHOE K1500 TAHOE LT	2011	Personal Utility Veh	1GNSKBE00BR247144	0	PVA	
☑	Ready for billing	0000716864-2012-2012	GREENSBORO, GUILFORD	27,710	27,710	27,710	DODG	CHALLENGER SRT8	2009	Coupe	2B3LJ74W19H539111	0	PVA	

2. Click the **Export** button at the top of the Vehicle Summary section.

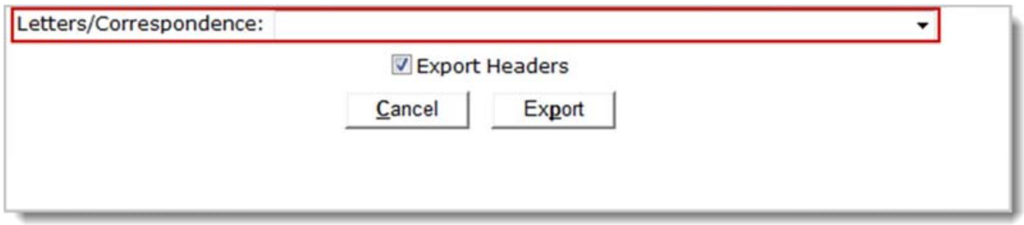


	Abstract Status	Abstract #	Tax District	Final Value ($)	TEC Value ($)	Value ($)	Make	Model	Model Year	Body Style	Vin #	Weight (lbs.)	Plate Ctgy	Notes/ Corr
☑	Ready for billing	0000514244-2012-2012	GREENSBORO, GUILFORD	34,370	34,370	34,370	CHEV	TAHOE K1500 TAHOE LT	2011	Personal Utility Veh	1GNSKBE00BR247144	0	PVA	
☑	Ready for billing	0000716864-2012-2012	GREENSBORO, GUILFORD	27,710	27,710	27,710	DODG	CHALLENGER SRT8	2009	Coupe	2B3LJ74W19H539111	0	PVA	

The Letters/Correspondence pop-up window appears.

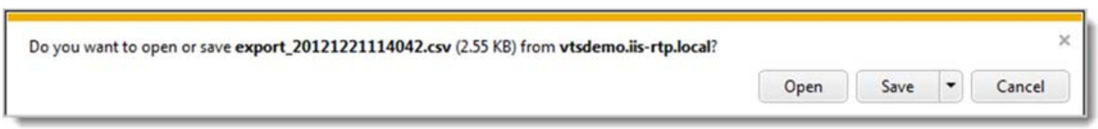
Exporting Data for Use Outside of NCVTS
INSTRUCTOR DEMONSTRATION ONLY

3. Select the type of letter for which you need abstract information.



4. Click the **Export** button.

5. In the message window, click the arrow on the **Save** button and select the **Save as** option.



The Save As window displays.

6. Navigate to and select the desired location where you want to store the file.

7. Click the **Save** button.

The information is saved to a CSV file. You can use this file to create mass mailings outside of NCVTS.

Abstract #	Final Valu	DOR Valu	Value ($)	Make	Model	Model Ye	Body Style	Vin #	Weight (lt	Plate Ctgy	Primary O	Secondary	Reg Use Code
000959905	6070	6070	6070	MAZD	5	2006	4 Door Se	JM1CR293	0	PLACPVA	ALSTON-S	SMITH, KE	REGCPASS
000879888	14930	14930	14930	LEXS	IS250 AWI	2006	4 Door Se	JTHCK262	0	PLACPVA	ARRINGTC	SMITH, NA	REGCPASS
000238275	13760	13760	13760	TOYT	CAMRY BA	2011	4 Door Se	4T1BF3EK	0	PLACPVA	BAILEY-SN	SMITH, TE	REGCPASS
001483340	5330	5330	5330	CHEV	K15	2002	Station W	1GNFK16Z	0	PLACPVA	BELGADO-	SMITH, RC	REGCPASS
000227585	6770	6770	6770	KIA	RIO BASE/	2009	4 Door Se	KNADE22	0	PLACPVA	BOWSER,	SMITH, ST	REGCPASS
000235027	7430	7430	7430	NISS	VERSA S/S	2007	4 Door Se	3N1BC13E	0	PLACPVA	BRELAND, CAROL EL		REGCPASS
000938981	11970	11970	11970	CHEV		2010	4 Door Se	1G1ZA5E0	0	PLACPVA	BROWN, H	SMITH, DA	REGCPASS
001770282	1000	0	1000	COX		1983	Trailer	1CZBF11S	0	PLACPVL	BURLEY, S	SMITH, JO	REGCTRLR
000970751	4830	4830	4830	HOND	CR-V	2002	Station W	JHLRD774	0	PLACPVA	CHARLES,	SMITH, KI	REGCPASS
001487858	20760	20760	20760	AUDI		2011	2 Door Se	WAUKJAF	0	PLACPVA	CLINE, LES	SMITH, BR	REGCPASS
000998555	13920	13920	13920	TOYT	4 RUNNER	2006	Multipurp	JTEZU14R1	0	PLACPVA	COLTRANE, ERIN MA		REGCPASS
000229941	5150	5150	5150	TOYT	CAMRY U.	2003	4 Door Se	4T1BE32K	0	PLACPVA	DAVIS, PAMELA YVET		REGCPASS
001010179	13760	13760	13760	TOYT	CAMRY BA	2011	4 Door Se	4T1BF3EK	0	PLACPVA	DESANTIS	SMITH, VA	REGCPASS
001484883	13550	13550	13550	CHEV	IMPALA LT	2011	4 Door Se	2G1WG5E	0	PLACPVA	DIGGS, TE	SMITH, EN	REGCPASS
000232657	24540	24540	24540	LNDR	LR3	2008	Multipurp	SALAG254	0	PLACPVA	EDWARDS	SMITH, MI	REGCPASS
000225255	5700	5700	5700	STRN		2005	4 Door Se	1G8JD54R	0	PLACPVA	FERGUSON	DIXON, JC	REGCPASS
000965249	10500	10500	10500	TOYT	HIGHLANI	2005	Multipurp	JTEGP21A	0	PLACPVA	FISCHER, F	SMITH, JE	REGCPASS
001483872	9110	9110	9110	HOND	CIVIC U.S.	2006	4 Door Se	1HGFA158	0	PLACPVA	FISHER, GI	SMITH, CY	REGCPASS
001485786	4010	4010	4010	TOYT	CAMRY U.	2002	4 Door Se	4T1BE32K	0	PLACPVA	GRACEY, C	SMITH, ST	REGCPASS
001068770	18177	0	18177	FORD		2013	4 Door Se	1FADP3N	0	PLACPVA	HALL, ERN	SMITH, VI	REGCPASS
001770832	6900	6900	6900	FORD	EXPEDITIC	2004	Multipurp	1FMRU15	0	PLACPVA	HEDGEPET	SMITH, GE	REGCPASS
001483431	10360	10360	10360	GMC	YUKON	2003	Multipurp	1GKFK66U	0	PLACPVA	HUNT, CLARISSE THE		REGCPASS

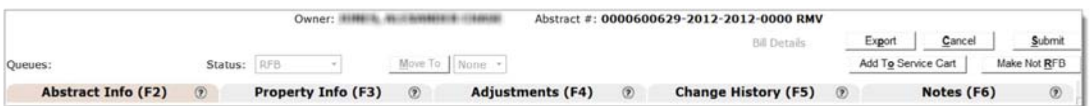
Information on an Abstract

Abstract records contain a lot of information organized into sections and tabs. The main tabs of an abstract are:

- Abstract Info
- Property Info
- Adjustments
- Change History
- Notes

Header

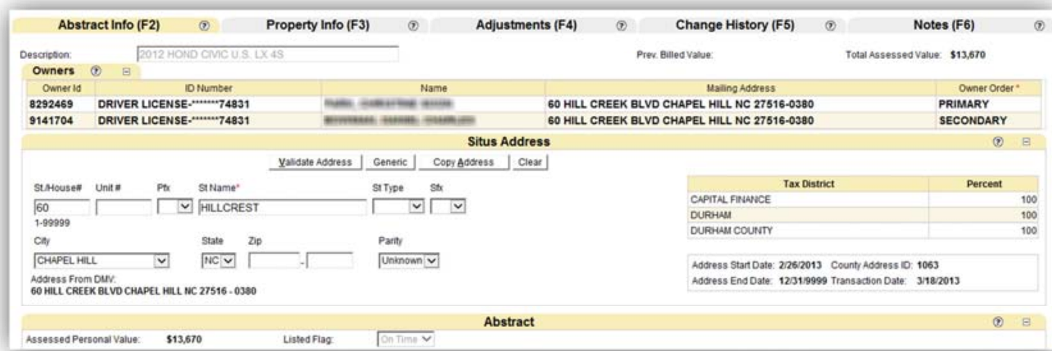
Overall information on each abstract record includes the owner and abstract number, any queues the abstract is in currently, and a set of buttons and links that allow you to take action on the record.



Information on an Abstract (continued)

Abstract Info Tab

The Abstract Info tab contains overall information on the abstract, including owner name(s), Situs address, tax district(s), and the total assessed value used in tax calculations.



The Function keys listed with each tab name are a navigation hint. If you want to move to a particular tab, you can press its function key. For example, if you want to go to the Property Info tab, you can press **F3** instead of clicking on the tab name.

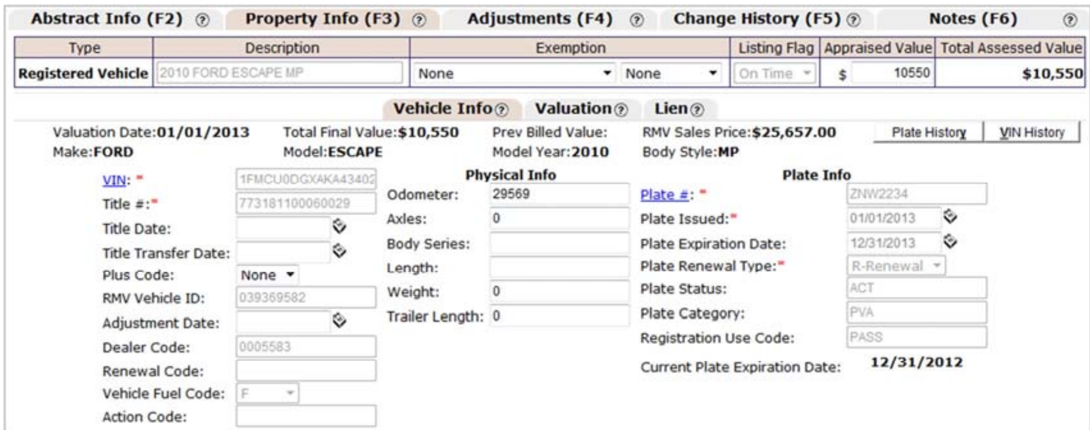
Information on an Abstract (continued)

Property Info tab

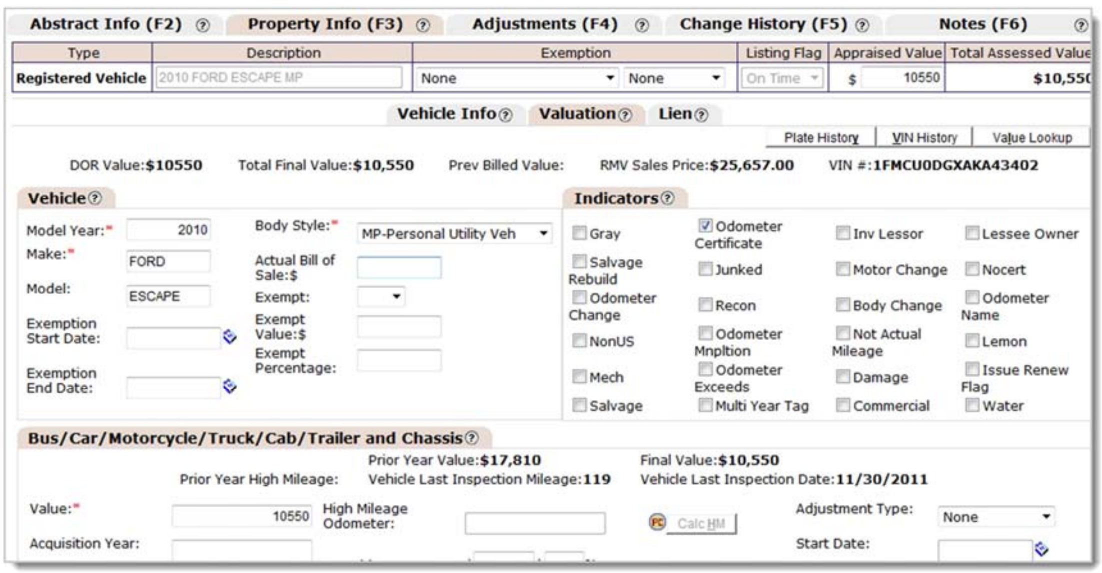
Overall (header) information on the Property Info tab includes the description, exemption status (if any), and the total assessed value of the vehicle.

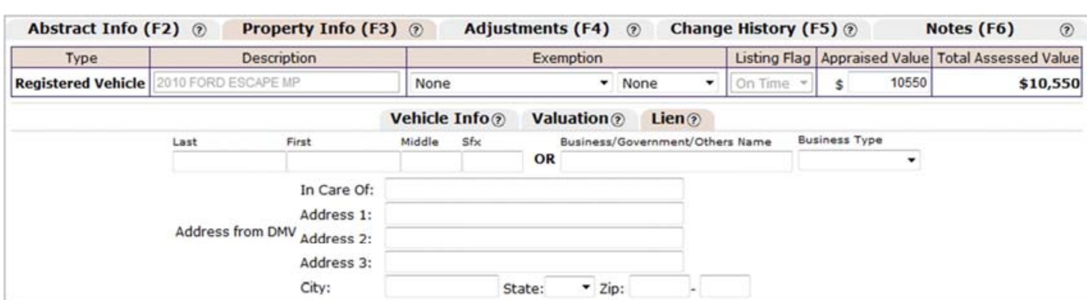
The Property Info tab includes the majority of fields that you might update when working with abstract records.

The information on this tab is further divided into three additional tabs: Vehicle Info, Valuation, and Lien.



The Valuation tab includes four tabs to capture information on additional body types.





Information on an Abstract (continued)

Adjustments Tab

After an abstract is billed, if any adjustments are made, these appear on the Adjustments tab. From this tab you can see the status of the adjustment as well as details of each value that changed on the abstract with the adjustment.

Abstract Info (F2) | Property Info (F3) | Adjustments (F4) | Change History (F5) | Notes (F6)

1

Adj#	Processed By	Process Date	Status	Adjustment Type/ Reason	Entered Date/ By	Appeal Level	Attribute: Old Data → New Data
1			Pending	Abstract Info/ Damage	12/20/2012 GUILFVA		Total Taxable Value: 10490 → 875
				Property Info/ Damage	12/20/2012 GUILFVA		Value Appr: 10490 → 875
				Veh Registration Info/ Damage	12/20/2012 GUILFVA		Title Date: 12/31/9999 → Title Transfer Date: 12/31/9999 →
				Veh Chassis Val Info/ Damage	12/20/2012 GUILFVA		Acquisition Cost: → 3500 Acquisition Year: → 2005 Values: 10490 → 875
				Veh Indicators/ Damage	12/20/2012 GUILFVA		Veh Indicators: *Odometer Certificate → *Damage

Change History Tab

The Change History tab shows each change made to the abstract. Information for each change includes the date and time the change was made in NCVTS, the username of the person who made the change, the field name that was changed, and the old and new value.

Abstract Info (F2) | Property Info (F3) | Adjustments (F4) | Change History (F5) | Notes (F6)

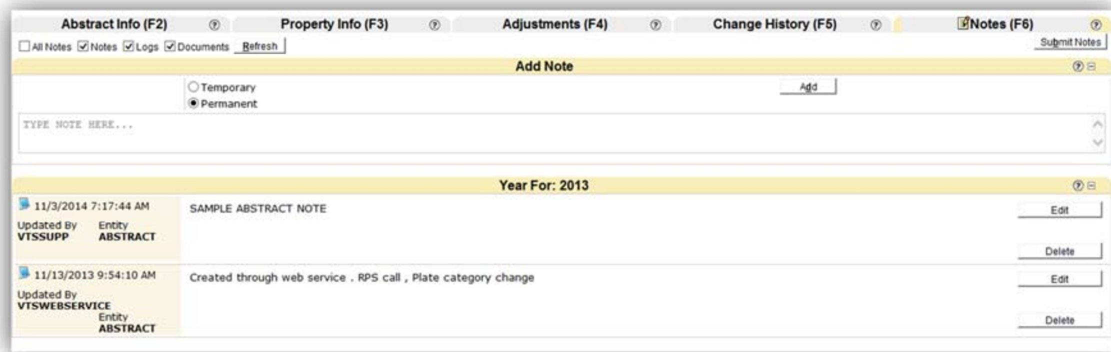
1

Date/Time ▽	User ID	Field Changed	Old Data	New Data
12/28/2012 2:08:25 PM	GUILFVA	Abstract Status	RFB	Not RFB
12/19/2012 1:52:50 PM	VTSSUPP	Bill Due Date	01/15/2012	01/15/2013
12/18/2012 3:35:21 PM	VTSSUPP	Abstract Status	Received	RFB

Information on an Abstract (continued)

Notes Tab

The Notes tab includes any notes added to the abstract.



Adding Notes to an Abstract

You can add a note to an abstract at any time, regardless of the abstract's status. Notes may be added and edited from the Notes tab or from the Vehicle Tax Search Results page.

You also have the ability to upload scanned copies of documents into NCVTS.

> A note may be either temporary or permanent. This status determines whether the abstract will be up for review next year because of the note. We will cover this process in greater detail in *Module 2: Abstract Processing*.

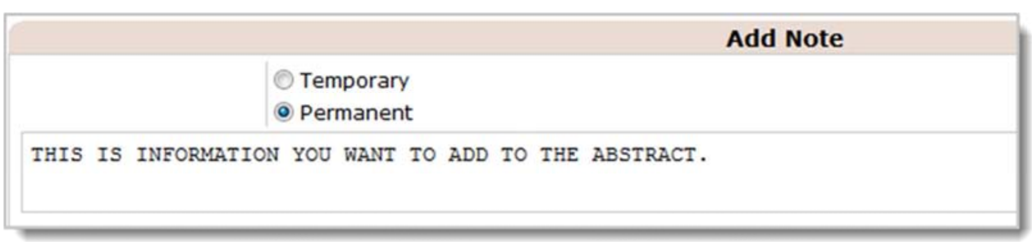
Rather than uploading a scanned image, consider uploading a document that contains a link to the image. If you use this approach, you can keep all of your scanned documents in a single location outside of NCVTS and access them as needed.

Steps

1. From the Maintain Vehicle Abstract page, click the **Notes** tab.

The Notes tab displays.

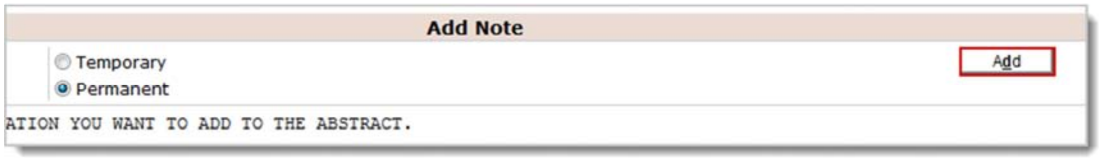
2. Click in the text box that states **TYPE NOTE HERE….** and type the information you want to add.



Adding Notes to an Abstract (continued)

Saving notes to an abstract is a two-step process. First you add the note, and then submit it. You can click either the Submit Notes button or the Submit button for the entire abstract to save new and edited notes.

3. Click the **Add** button in the Add Note section.



The Note is added to the abstract.

4. Click the **Submit Notes** button at the top of the Notes tab.

The note is saved with the abstract.

Summary & Review

Challenge Exercise

What tab on an abstract is the vehicle situs address found under?

____

On an abstract, which tab would you find the vehicle identification number?

____

Under what tab would you find the bill due date?

____

Under which secondary tab would you find the plate category?

____

When doing a search with an asterisk (*), the asterisk is referred to as?

____

When creating a note, what two-step process must you do to save the note?

1. ____
2. ____

If you make a note Temporary will it carry forward to next year’s abstract?

____

MODULE 2:
ABSTRACT PROCESSING

FARRAGUT

Chapter 1: Clearing Queues

Introduction

The Clearing Queues chapter describes the concept of NCVTS vehicle tax queues as well as how abstracts appear in and are processed through queues.

Objectives

- Understand vehicle tax queues
- Understand abstract processing
- Export a list of abstracts
- Process abstracts from the ANTIQUE queue
- Process abstracts from the PLUS_CODE queue
- Process abstracts from the CONDITION_CODE queue
- Process abstracts from the TRAILER queue
- Process abstracts from the RV queue
- Process abstracts from the EXEMPT queue
- Process abstracts in the NOTES queue
- Process abstracts from NO_VALUE queues

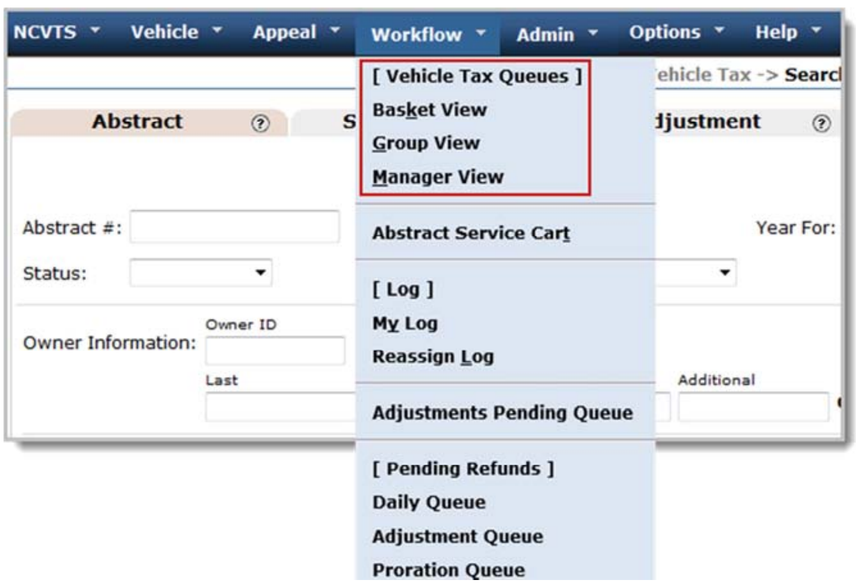
Abstract Processing from Queues

Abstracts that require attention populate the Vehicle Tax Queue with a status of Received. Once an abstract has been cleared out of the queue the abstract status changes to RFB (Ready for Bill) in the system. All abstracts are processed at the end of the month regardless of whether they have been worked individually through their queue(s).

Depending on access rights and assignments, you may choose to view the queues in one of three formats:

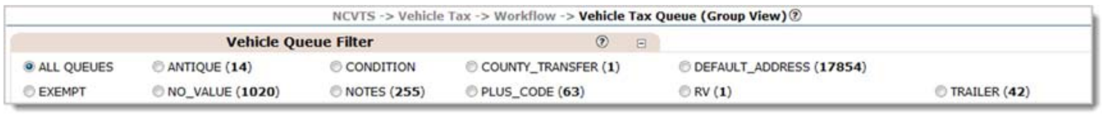
- Basket View
- Group View
- Manager View

The three Vehicle Tax Queues are accessed from the Workflow menu.



Vehicle Tax Queues

Data from STARS will go through a valuation and Situs process. Abstracts which meet the criteria for one or more vehicle tax queues will be populated in the relevant queues the last Saturday of the month.



Criteria used to populate each queue:

Queue	Criteria to Populate Queue
No Value	Vehicles (buses, cars, motorcycles, and trucks) whose accurate value is not identified by DOR.
Default Address	Situs address is not matched with the NCVTS Situs repository
Condition	Abstracts where there is a condition code from the previous year and the override status is “T” (temporary).
Antique	Vehicles that are 35 years old or older, that have a horseless carriage plate, or that have an Antique plate.
RV	Vehicles that qualify as a recreational vehicle and an accurate value is not identified by DOR.
Plus-Code	Vehicles that are flagged with a plus code by TEC and have a registered weight that is greater than or equal to the configured license weight set by DOR.
Exempt	Vehicles which are permanently exempt from taxes.
Trailer	Vehicles with a body style of trailer or utility vehicle and accurate value is not identified by DOR.
Notes	Vehicles with permanent notes attached to them in the previous year.
County Transfer	Abstracts transferred from another county

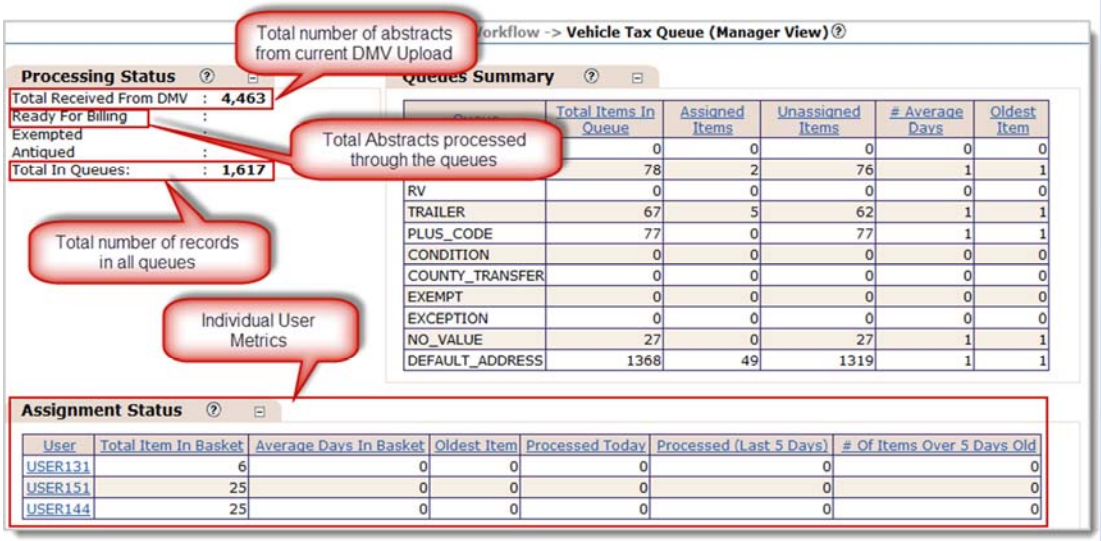
The number of abstracts in each queue is in parentheses. The number decreases as abstracts are cleared from the queue.

Manager View

The Vehicle Tax Queue (Manager View) page provides a summary of all registered motor vehicle abstracts requiring action, broken down by abstract status, queue statistics, and user. Key functions on this page include:

- Viewing processing status of all RMV abstracts
- Viewing summary queue statistics
- Viewing summary assigned user statistics
- Navigating to the Basket View of the selected user's.

1. From the **Workflow** menu, select **Manager View** from the list of [Vehicle Tax Queues].

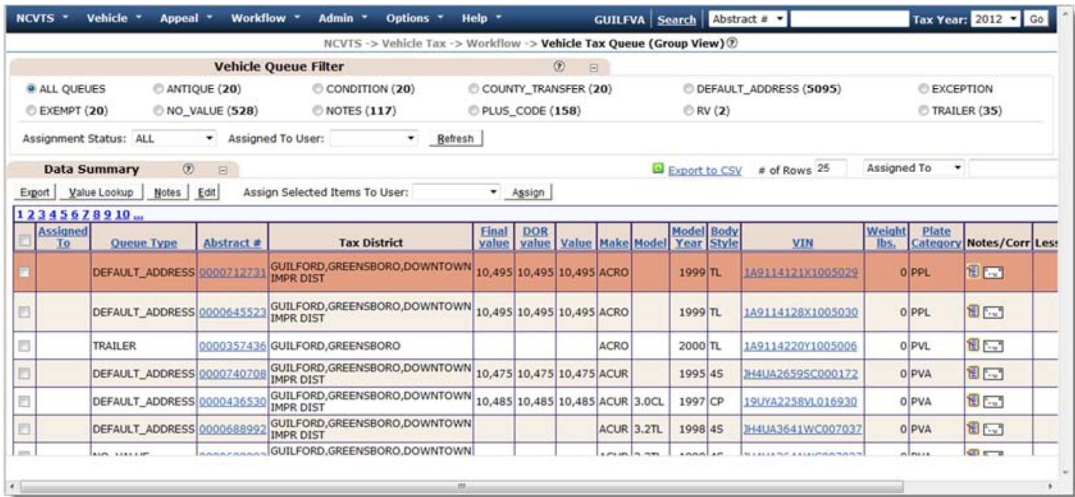


The Manager View is available only to NCVTS users with appropriate permissions.

Group View

The Vehicle Tax Queue (Group View) page provides a list of all vehicle abstracts that require action. The listing shows all assigned and unassigned work. Supervisors will assign/remove a range of abstracts for each user.

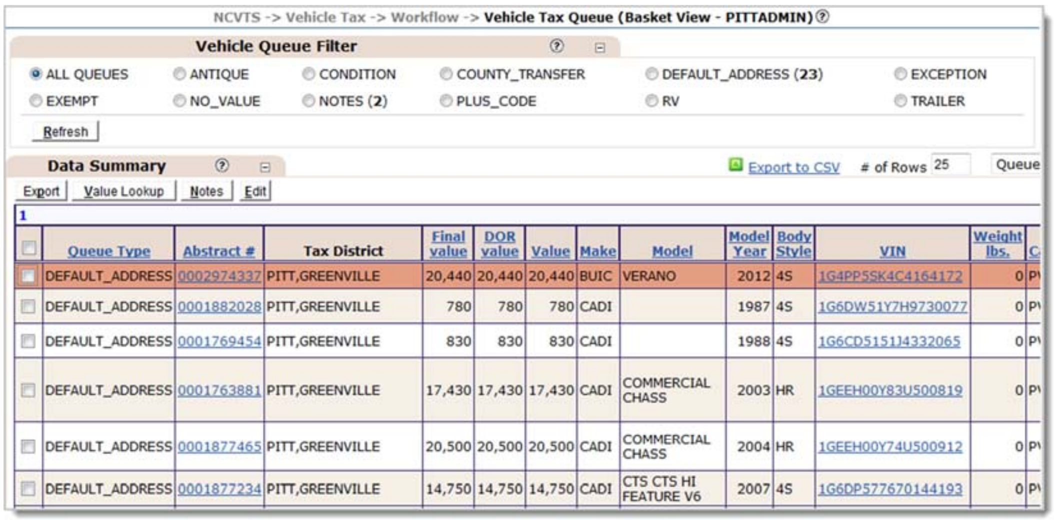
2. From the **Workflow** menu, select **Group View** from the list of [Vehicle Tax Queues].



Basket View

The Vehicle Tax Queue (Basket View) page displays all abstracts that are currently assigned to you. The functionality available on the Basket View page is the same as on the Group View page with the exception of the option to assign abstracts to other users.

1. From the **Workflow** menu, select **Basket View** from the list of [Vehicle Tax Queues].



Queue Type	Abstract #	Tax District	Final value	DOR value	Value	Make	Model	Model Year	Body Style	VIN	Weight lbs.	C
DEFAULT_ADDRESS	0002974337	PITT,GREENVILLE	20,440	20,440	20,440	BUIC	VERANO	2012	4S	1G4PP5SK4C4164172	0	P
DEFAULT_ADDRESS	0001882028	PITT,GREENVILLE	780	780	780	CADI		1987	4S	1G6DW51Y7H9730077	0	P
DEFAULT_ADDRESS	0001769454	PITT,GREENVILLE	830	830	830	CADI		1988	4S	1G6CD5151J4332065	0	P
DEFAULT_ADDRESS	0001763881	PITT,GREENVILLE	17,430	17,430	17,430	CADI	COMMERCIAL CHASS	2003	HR	1GEEH00Y83U500819	0	P
DEFAULT_ADDRESS	0001877465	PITT,GREENVILLE	20,500	20,500	20,500	CADI	COMMERCIAL CHASS	2004	HR	1GEEH00Y74U500912	0	P
DEFAULT_ADDRESS	0001877234	PITT,GREENVILLE	14,750	14,750	14,750	CADI	CTS CTS HI FEATURE V6	2007	4S	1G6DP577670144193	0	P

Basket views are assigned by supervisors. The process can be done manually in the group view or by mass assignment during the DMV upload process.

Exporting Search Results

The Search pages of NCVTS allow you to send the results of a search to a file that you can save and print as needed. After performing a search, clicking the Export to CSV link will create a CSV (Comma Separated Value) file that you can view using Microsoft Excel.

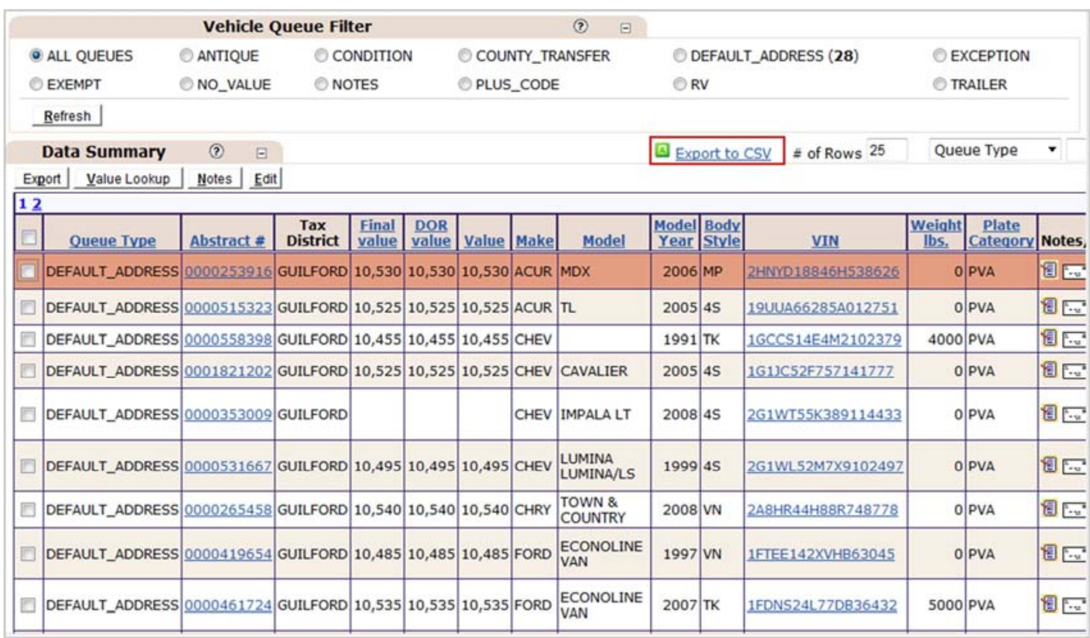
SET THE STAGE

It is the first of the month and you have abstracts in your basket view ready for processing. Before you process the abstracts, you want to keep a list of all the records you will process this month. You can use the Export functionality to keep a list of all records you will process each month.

Exercise Steps

1. From the **Workflow** menu, select **Basket View** from the list of [Vehicle Tax Queues].

Click the **Export to CSV** link.

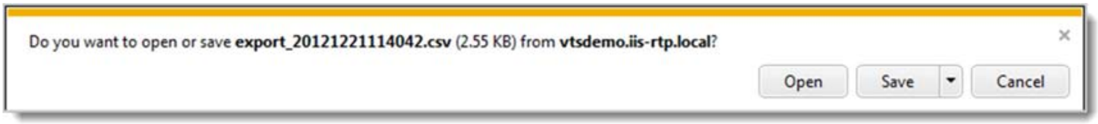


A message appears asking whether you want to open or save the exported information.

A CSV file is a type of file that you can open in Microsoft Excel. CSV stands for "comma-separated value."

Exporting Search Results (continued)

In the message window, click the arrow on the **Save** button and select the **Save as** option.



The Save As window displays.

Navigate to and select the desired location where you want to store the file.

Click the **Save** button.

The records are saved to a CSV file.

Processing Abstracts from the ANTIQUE Queue

Each county can set how frequently abstracts appear in the ANTIQUE queue.

Vehicles with horseless carriage or antique plates, or those that are 35 years old or older will appear in the Antique queue. If NCVTS is configured to review antiques every three years, abstracts for antique vehicles will be automatically added to the queue three years from the original entry date. The review time is configurable for each county. If an abstract is approved for antique status, the bill will be calculated using the county default value. If the abstract is rejected for antique status, the vehicle will be billed as a normal vehicle.

SET THE STAGE

A number of vehicle records are assigned to you that NCVTS has flagged as antiques. You need to go into the ANTQUE queue and accept these records as antique status to clear them from the queue.

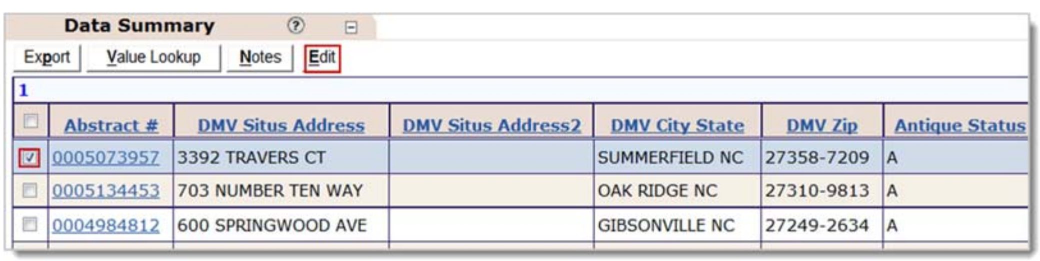
Steps

1. From the **Workflow** menu, select **Basket View** from the list of [Vehicle Tax Queues].

Select the **ANTIQUE** radio button, and then click the **Refresh** button

Abstracts in the ANTIQUE queue display in the Data Summary section.

Click the checkbox beside the abstract you want to work, and then click the **Edit** button



	Abstract #	DMV Situs Address	DMV Situs Address2	DMV City State	DMV Zip	Antique Status
☑	0005073957	3392 TRAVERS CT		SUMMERFIELD NC	27358-7209	A
☐	0005134453	703 NUMBER TEN WAY		OAK RIDGE NC	27310-9813	A
☐	0004984812	600 SPRINGWOOD AVE		GIBSONVILLE NC	27249-2634	A

The abstract information displays in a pop-up window.

Processing Abstracts from the ANTIQUE Queue (continued)

Select the radio button **Accept**, then click the **Submit** button

The Basket View displays; the number for the NO_VALUE queue decreases by one and the abstract has been cleared from the list.

By default, abstracts in the Antique Queue are set to "Do Nothing" status as a way to populate the queue. If the abstracts are not worked, the monthly billing process removes abstracts from the queue and applies the DOR recommended value.

Processing Abstracts from the PLUS_CODE Queue

Abstracts in the PLUS_CODE queue have been flagged with a plus code by TEC and the vehicle weight exceeds a predefined limit set by DOR.

Abstracts with a flagged plus code and that exceed the predefined weight limit display a "+" sign in the Plus Code field. In the event the vehicle has an additional body type, you must provide a value for the addition in order to process the abstract through the queue. The value of the vehicle plus the value of the additional body will be added together to determine the Total Assessed Value of the vehicle.

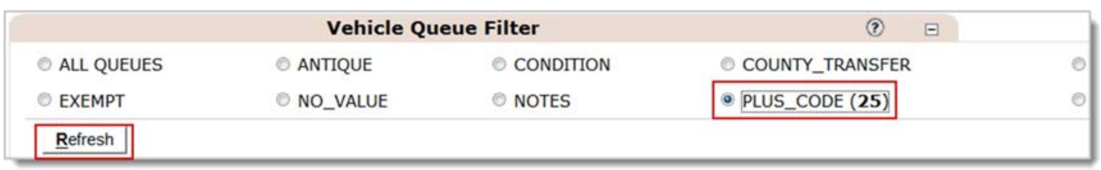
SET THE STAGE

A taxpayer installed a dump bed on their pick-up truck. The vehicle now has an additional body type and the abstract needs to be updated so the taxes will be calculated on the total value of the truck.

Exercise Steps

1. From the **Workflow** menu, select **Basket View** from the list of [Vehicle Tax Queues].

Select the **PLUS_CODE** radio button, and then click the **Refresh** button

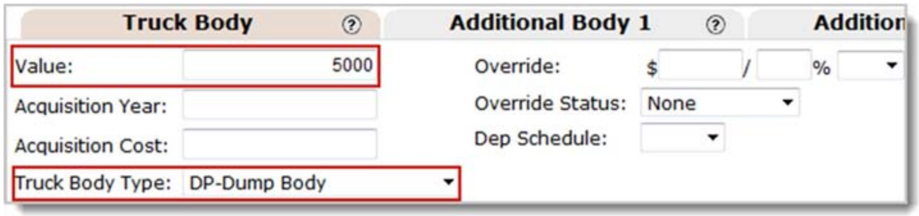


The abstracts in your PLUS_CODE queue display in the Data Summary section.

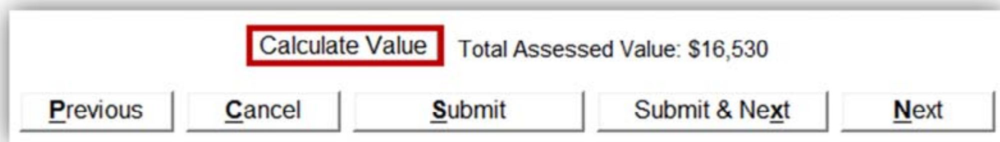
Select the checkbox beside the abstract you want to work, and then click the **Edit** button

Processing Abstracts from the PLUS_CODE Queue (continued)

2. On the Truck Body tab, type the value in the **Value** field and select the correct type from the **Truck Body Type** field



3. Scroll down to the bottom of the page and click the **Calculate Value** button to verify that the correct Total Assessed Value will be saved to the abstract

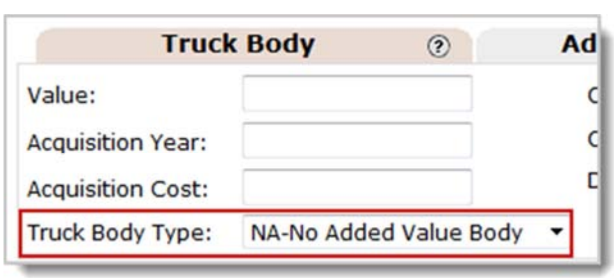


4. Click the **Submit** button at the bottom of the window

The Basket View displays; the number for the PLUS_CODE queue decreases by one and the abstract has been cleared from the list.

No Added Value

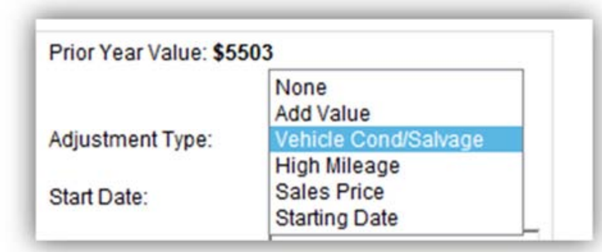
If you review an abstract in the PLUS_CODE queue and determine that the additional body adds no value to the vehicle, you should select NA-No Added Value Body in the Truck Body Type field. This will prevent the abstract from appearing in the PLUS_CODE queue next year.



Processing Abstracts from the CONDITION Queue

Abstracts in the CONDITION queue have some type of condition code from the previous year and the override status is temporary.

The following condition codes are available in NCVTS:



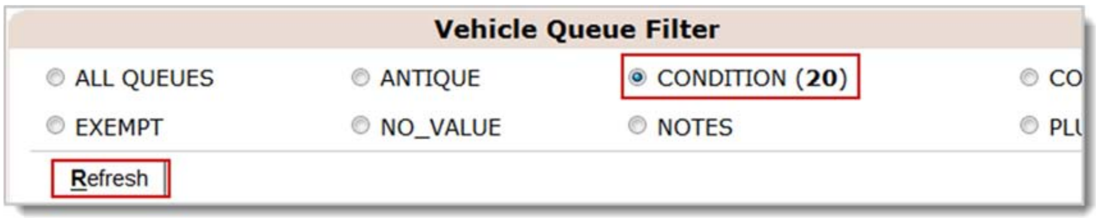
Add Value	Use when the vehicle is considered to have features that increase its value.
Vehicle Cond/Salvage	Use when the vehicle is damaged or has a branded title.
High Mileage	Use when the mileage on the vehicle is greater than average.
Sales Price	Sales price is the value of a vehicle purchased from a registered motor vehicle dealer
Starting Date	Use when the adjustment includes the Starting Date, Starting Value, and Minimum Value fields with a set Depreciation Schedule.

A condition was applied for a vehicle in the previous year. Taking into consideration the vehicle’s condition, you want to manually depreciate the value of the vehicle by 10% by entering an override.

Exercise Steps

1. From the **Workflow** menu, select **Basket View** from the list of [Vehicle Tax Queues].

Select the **CONDITION** radio button, and then click the **Refresh** button



Abstracts in the CONDITION queue display in the Data Summary section.

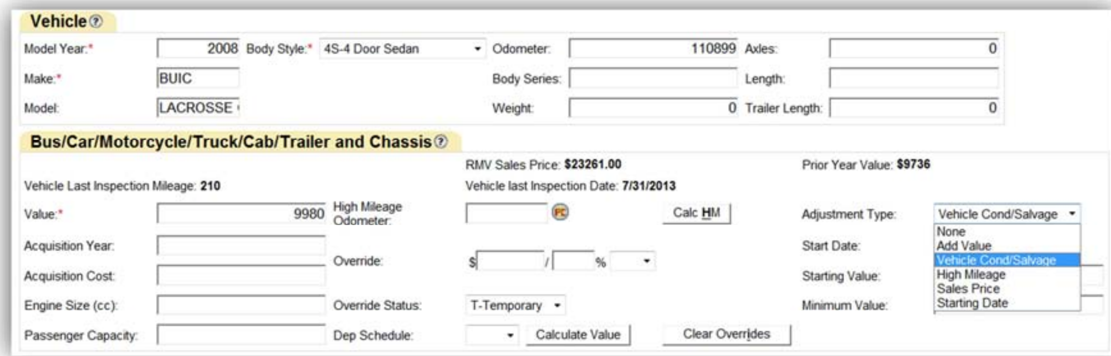
2. Click the checkbox beside the abstract you want to work, and then click the **Edit** button

Processing Abstracts from the CONDITION Queue (continued)

Override is based on percent good.

3. In the Bus/Car/Motorcycle/Truck/Cab/Trailer and Chassis section, enter and/or select the following:

Override Type	Pct
Override	90
Override Status	Permanent



The override value is auto-calculated once you Tab or Click in the next field.

If you want to set a permanent minimum value on a vehicle, use the Override type of Val and set the Status to Permanent. The abstract will not depreciate and won't appear in next year's queues.

4. Scroll down to the bottom of the page and click the **Submit** button

The Basket View displays; the number for the CONDITION queue decreases by one and the abstract has been cleared from the list.

Processing Abstracts from the EXEMPT Queue

Abstracts in the EXEMPT queue are exempt from tax based on their exemption code and a permanent override status. When processing these abstracts, you may accept or reject their exempt status. If you accept the exemption, the vehicle will be taxed according to its percent good/value (if any). If you reject the exemption, the vehicle will be taxed as a normal vehicle.

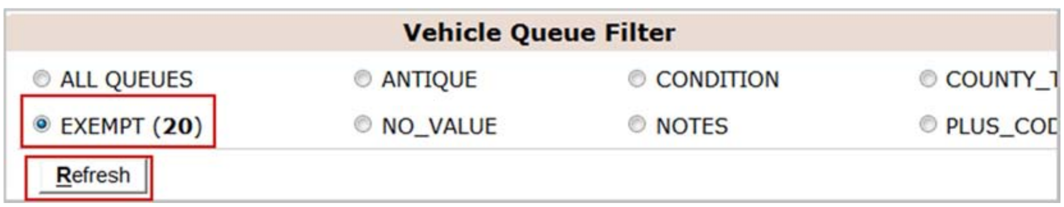
SET THE STAGE

There are abstracts in the EXEMPT queue. To clear the abstracts from the queue you will need to approve the exemption.

Exercise Steps

1. From the **Workflow** menu, select **Basket View** from the list of [Vehicle Tax Queues].

Select the **EXEMPT** radio button, and then click the **Refresh** button



Abstracts in the EXEMPT queue display in the Data Summary section.

2. Click the checkbox beside the abstract you want to work, and then click the **Edit** button

3. Select the **Accept** radio button and click the **Submit** button

The Basket View displays; the number for the EXEMPT queue decreases by one and the abstract has been cleared from the list.

If you do not process an abstract in the EXEMPT queue, at the end of the month the record will be processed as an exempt vehicle.

Permanent exemptions will return each year. If you do not want the permanent exemptions to populate in the queue every year, set an end date that is far into the future.

Processing Abstracts from the NOTES Queue

Counties can choose to turn off the Notes queue.

Abstracts in the NOTES queue have permanent notes attached to them from previous years. Changes to the abstract may or may not be necessary depending on the note. Abstracts with temporary notes will not show up in the queue next year, but the note remains associated with the abstract. Notes on multiple abstracts can be accepted from the notes queue or reviewed and accepted individually.

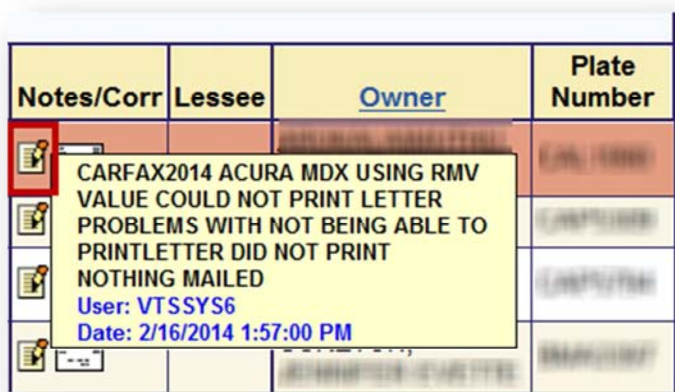
SET THE STAGE

Abstracts in the NOTES queue require your review. To process the abstracts you will need to review the notes on each abstract and accept the abstract as is.

Exercise Steps (Accepting Notes on Multiple Abstracts)

1. From the **Workflow** menu, select **Basket View** from the list of [Vehicle Tax Queues].

2. Hover over the notes icon to review notes on the abstract

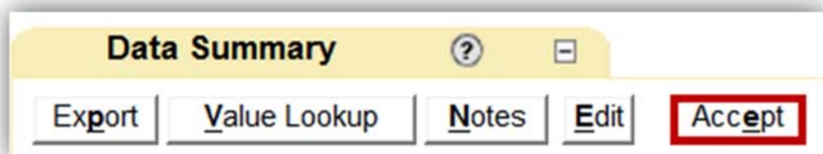


Processing Abstracts from the NOTES Queue (continued)

3. Select the checkboxes next to the abstract(s) whose notes you want to accept

	Assigned To	Abstract #	Tax District	Final value	DOR value	Assessed Value	Make	Model	Model Year	Body Style	VIN	Notes/Corr
☑	[illegible]	0017173674	MECKLENBURG,CHARLOTTE				ACUR		2014	MP	[illegible]	
☑	[illegible]	0017172113	MECKLENBURG,CHARLOTTE				ACUR		2014	MP	[illegible]	
☑	[illegible]	0017173517	MECKLENBURG,CHARLOTTE,SPECIAL DISTRICT 4				ACUR		2014	MP	[illegible]	

4. Click the **Accept** button

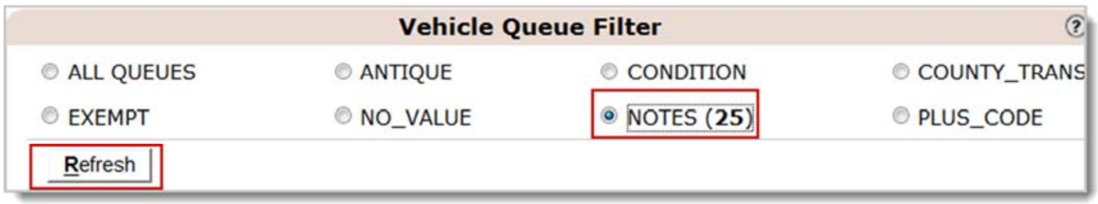


Processing Abstracts from the NOTES Queue (continued)

Exercise Steps (Accepting Notes on Individual Abstracts)

1. From the **Workflow** menu, select **Basket View** from the list of [Vehicle Tax Queues].

2. Select the **NOTES** radio button, and then click the **Refresh** button

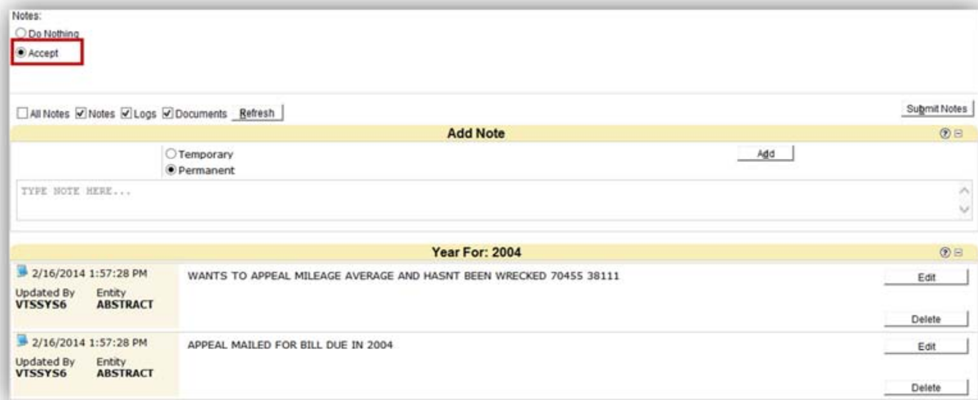


Abstracts in the NOTES queue display in the Data Summary section.

3. Click the checkbox beside the abstract you want to work, and then click the **Edit** button

Processing Abstracts from the NOTES Queue (continued)

4. Select the **Accept** radio button under Notes

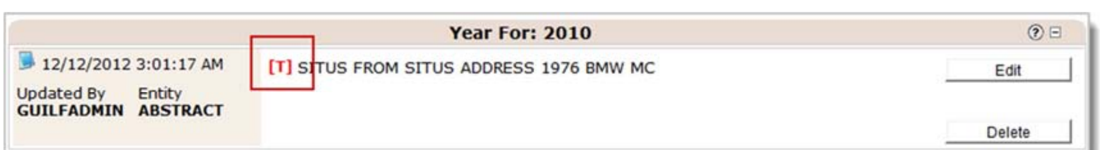


5. Scroll down to the bottom of the page and click the **Submit** button

The Basket View displays; the number for the NOTES queue decreases by one and the abstract has been cleared from the list.

Change Note Status

If you would prefer not to review the abstract's note in next year's queue, edit the note and change its status to Temporary. You will need to save the change to the note and then submit the abstract. You do not need to select the Accept radio button, although if you do not select the Accept radio button, then the abstract will not be cleared from the queue until the end of the month when billing occurs.

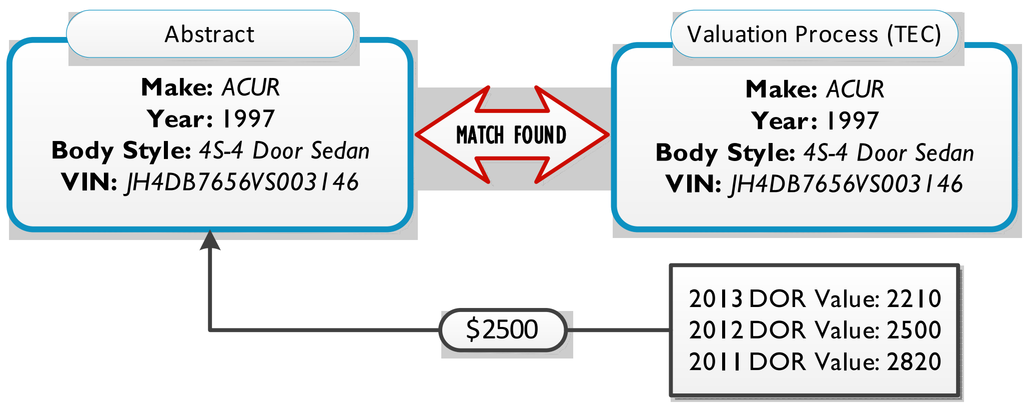


Temporary notes are marked with a **[T]**.

Vehicle Valuation Process

During the DMV Upload, the vehicle information from each abstract is compared to a set of values maintained by the DOR. This process allows most vehicles to be assigned a correct value as set by the DOR.

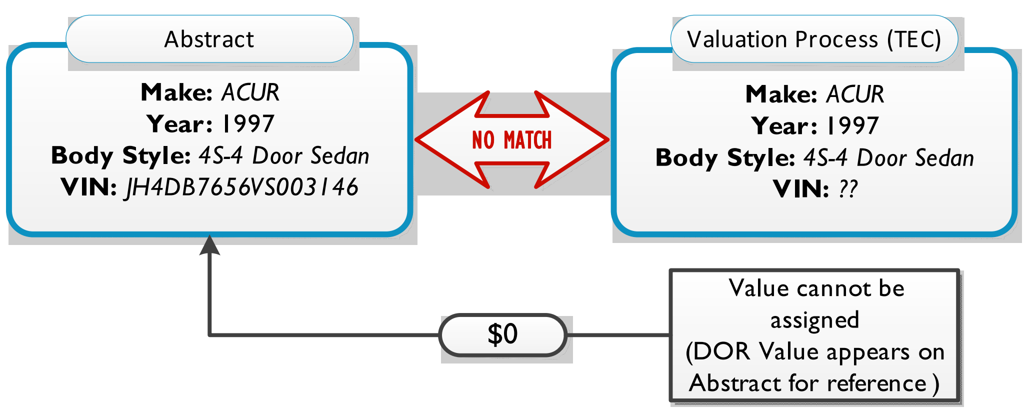
Vehicle Match



No Vehicle Match

If a value is not found for a vehicle, a default value is provided and displayed as the "DOR Recommended Default Value" on the abstract.

If the vehicle cannot be matched during the Valuation Process, the value on the abstract is set to 0.

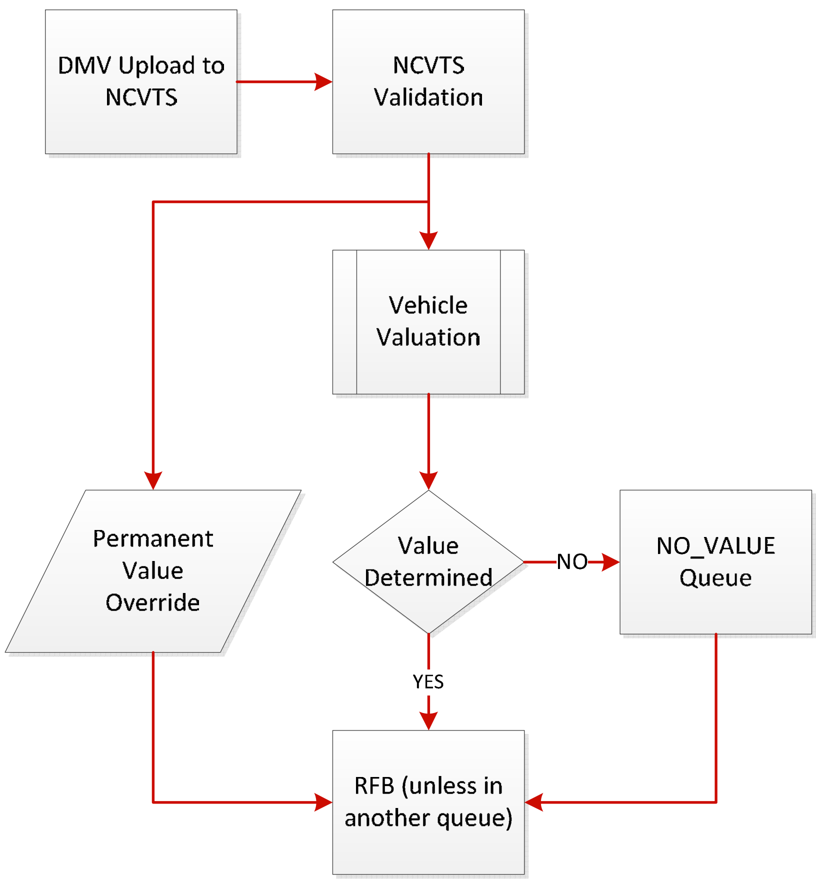


When no match is found, you can manually enter a value for the record. If you do not enter a value, at the end of the month the billing process will apply the DOR value by default.

Processing Abstracts from the NO_VALUE Queue

When a value cannot be matched to a vehicle, the abstract is assigned to the NO_VALUE Queue. Abstracts in this queue have no amount in the value field.

Vehicles that qualify as a recreational vehicle with no value will be assigned to the RV Queue. Vehicles with a body style of trailer or utility vehicle and no value will populate in the TRAILER Queue. For all three of these queues, if no value is entered, it will process at the end of the month with the median value provided from DOR.



Processing Abstracts from the NO_VALUE Queue (continued)

There is an abstract in your No Value queue because, during the vehicle valuation process, a value could not be determined for this vehicle. Through other resources, you are able to determine the value of the vehicle. Enter the value for the vehicle and clear the abstract from the queue.

Exercise Steps

5. From the **Workflow** menu, select **Basket View** from the list of [Vehicle Tax Queues].

Select the **NO_VALUE** radio button, and then click the **Refresh** button.

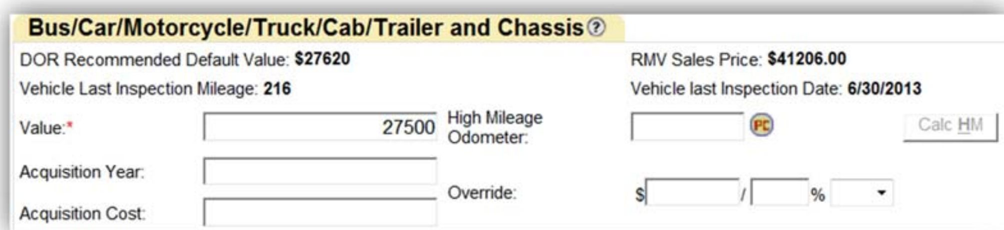
Abstracts in the NO_VALUE queue display in the Data Summary section.

Processing Abstracts from the NO_VALUE Queue (continued)

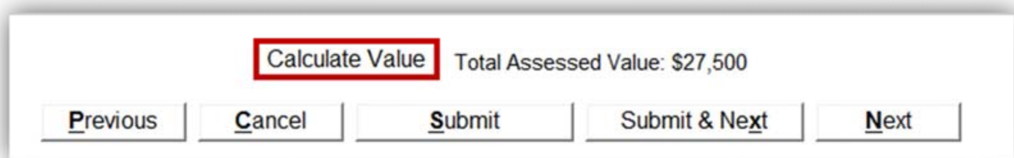
6. Click the checkbox beside the abstract you want to work, and then click the **Edit** button

The abstract information displays in a pop-up window.

7. Type the value of the vehicle in the **Value** field



8. Scroll down to the bottom of the page and click the **Calculate Value** button to verify that the correct Total Assessed Value will be saved to the abstract



9. Scroll down to the bottom of the page and click the **Submit** button

The Basket View displays; the number for the NO_VALUE queue decreases by one and the abstract has been cleared from the list.

You can use the **Value Lookup** button Value Lookup to find the DOR Recommended value, if available.

Processing Abstracts from the TRAILER Queue

Abstracts for trailers that cannot be assigned a value during the DMV Upload appear in the TRAILER queue. These abstracts may be processed in the same manner as the abstracts in the NO_VALUE queue. Another option is to manually assign a value and set the depreciation schedule for these abstracts.

Following the DMV Upload, there are a number of abstracts for trailers that could not be valued. You decide to manually assign a value and set a depreciation schedule for one of the abstracts.

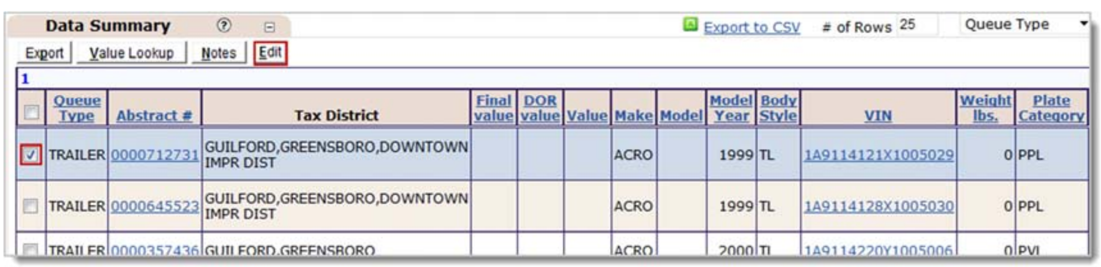
Exercise Steps

1. From the **Workflow** menu, select **Basket View** from the list of [Vehicle Tax Queues].

2. Select the **TRAILER** radio button, and then click the **Refresh** button.

   Abstracts in the TRAILER queue display in the Data Summary section.

3. Click the checkbox beside the abstract you want to work, and then click the **Edit** button.



   The abstract information displays in a pop-up window.

Processing Abstracts from the TRAILER Queue (continued)

4. Type the **Acquisition Year** and **Acquisition Cost**, and then select the **Depreciation Schedule**.

5. Click the **Submit** button at the top right of the page.

The changes are saved and the Final Value reflects the new taxable amount.

Processing Abstracts from the RV Queue

Abstracts for recreational vehicles that cannot be assigned a value during the DMV Upload appear in the RV queue. These abstracts may be processed in the same manner as the abstracts in the NO_VALUE queue. Another option is to manually assign a value and set the depreciation schedule for these abstracts.

SET THE STAGE

Following the DMV Upload, there are a number of abstracts for RVs that could not be valued. You decide to manually assign a value and set a depreciation schedule for one of the abstracts.

Exercise Steps

1. From the **Workflow** menu, select **Basket View** from the list of [Vehicle Tax Queues].
2. Select the **RV** radio button, and then click the **Refresh** button.

   Abstracts in the RV queue display in the Data Summary section.
3. Click the checkbox beside the abstract you want to work, and then click the **Edit** button.

The abstract information displays in a pop-up window.

Processing Abstracts from the RV Queue (continued)

4. Type the **Acquisition Year** and **Acquisition Cost**, and then select the **Depreciation Schedule**.

5. Click the **Submit** button at the top right of the page.

The changes are saved and the Final Value reflects the new taxable amount.

Chapter 2: All Things Situs

The abstracts in your Default Address and County Transfer queues will require Situs validation. In this chapter, we will review and process the abstracts in these queues. In addition, we will use additional features of NCVTS to efficiently work these abstracts.

Objectives

- Review abstracts in the Default Address queue
- Process abstracts from the DEFAULT_ADDRESS queue
- Process abstracts in the COUNTY_TRANSFER queue
- Transfer an abstract to another county
- Process multiple abstracts at once
- Add abstracts to the Abstract Service Cart
- Flag abstracts for review
- Understand the Situs repository
- Add and update Streets
- Find the Next Available County Address ID Number
- Add and update Situs addresses and aliases
- Upload Situs file
- Download Situs file
- View and reassign logs

Reviewing Abstracts

Part of working efficiently in NCVTS is reviewing the work you have in advance to see if any records may be processed together. In most cases, the abstracts that can be worked together appear in the DEFAULT_ADDRESS queue.

When reviewing abstracts in the DEFAULT_ADDRESS queue, look for the following:

- Abstracts from a single county that can be transferred together to another county
- Abstracts that share the same owner to which you can assign the same Situs address
- Abstracts that share the same Situs address (may not be the same DMV address, but keep in mind Situs determines taxes)
- Abstracts that require you to add addresses to your Situs repository

Using the Abstract Service Cart

Each user has an Abstract Service Cart that allows you to add and remove abstracts of interest to you. Once you add an abstract to your cart it will remain in your cart until you remove it.

SET THE STAGE

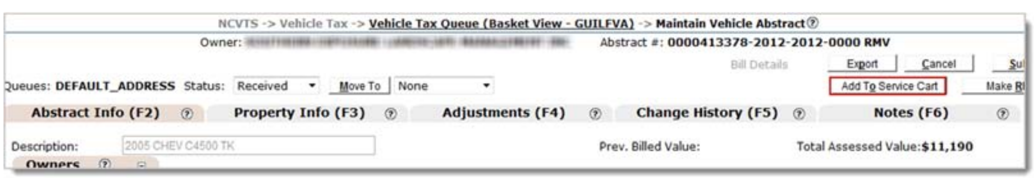
You are reviewing abstracts in the Default Address queue and realize you need to create a new address in your Situs repository before you can process the abstracts. You open the detail of the abstract and add it to your Abstract Service Cart.

Exercise Steps

1. From the **Workflow** menu, select **Basket View** from the list of [Vehicle Tax Queues].
2. Select the **DEFAULT_ADDRESS** radio button, and then click the **Refresh** button.

Abstracts in the DEFAULT_ADDRESS queue display in the Data Summary section.

3. Click the link in the Abstract # column to open an abstract.
4. Click the **Add to Service Cart** button.



A confirmation window displays.

Think of the Abstract Service Cart like the Favorites option of your web browser. Just like Favorites, the Abstract Service Cart is unique to you. Only you can add and remove abstracts from your service cart.

You can also add abstracts to the Service Cart from the Vehicle Tax Search Results page.

Using the Abstract Service Cart (continued)

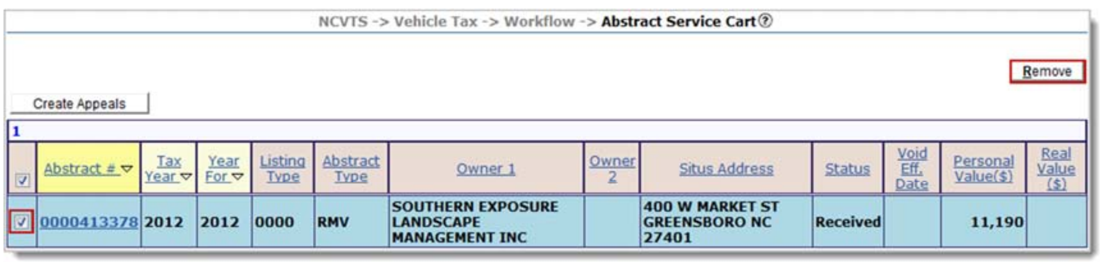
If you want others to see the list of abstracts that need review, you can flag them. To flag a selected abstract, select Flag Abstract from the Vehicle menu.

5. Click the **Close** button.

The abstract is added to your cart for future reference.

6. From the **Workflow** menu, select **Abstract Service Cart**.

7. Select the checkbox for the abstract, and then click the **Remove** button.

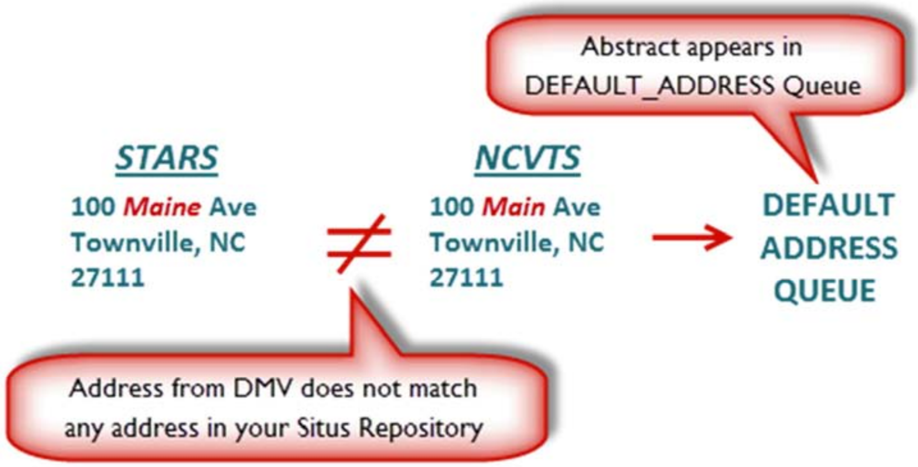


☑	Abstract #	Tax Year	Year For	Listing Type	Abstract Type	Owner 1	Owner 2	Situs Address	Status	Void Eff. Date	Personal Value($)	Real Value ($)
☑	0000413378	2012	2012	0000	RMV	SOUTHERN EXPOSURE LANDSCAPE MANAGEMENT INC		400 W MARKET ST GREENSBORO NC 27401	Received		11,190	

The abstract is removed from your Abstract Service Cart.

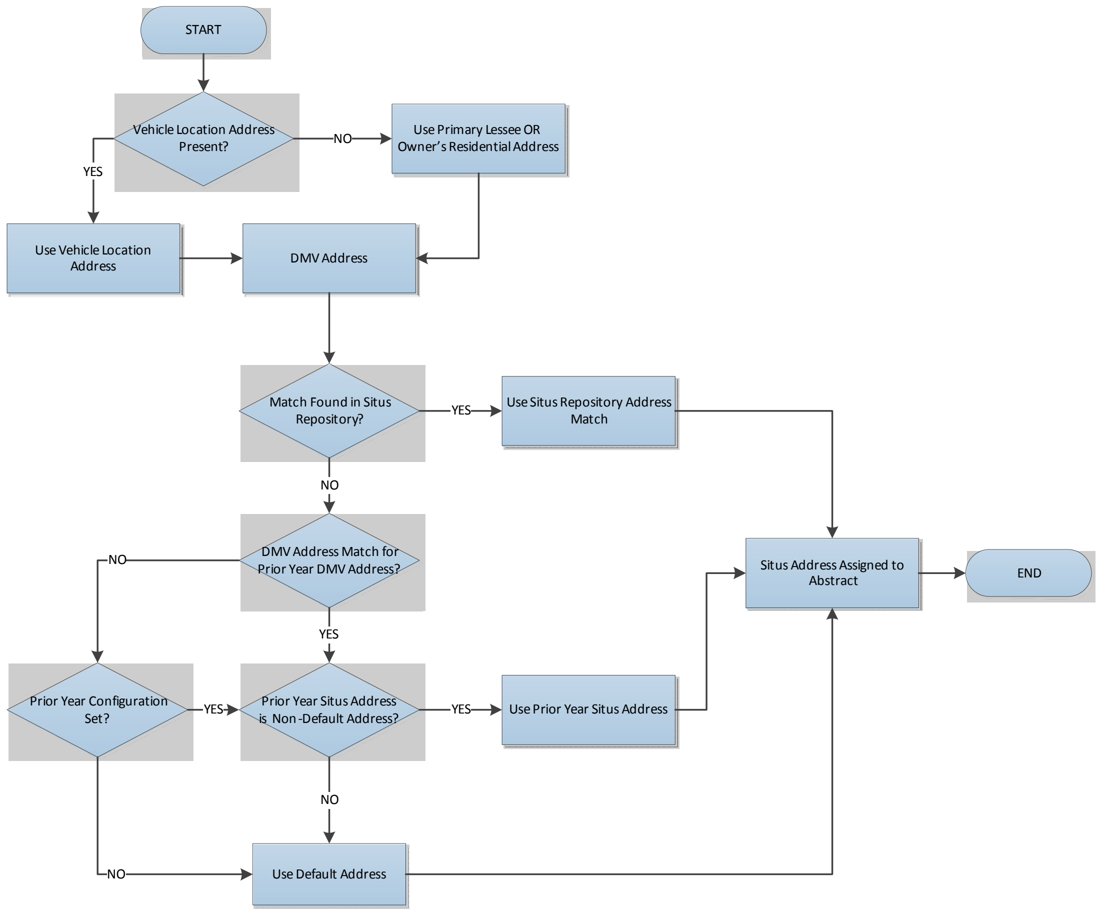
Processing Abstracts from the DEFAULT_ADDRESS Queue

When an abstract listing record has a physical address that cannot be matched to an address in your county's Situs repository, the abstract listing is assigned to the DEFAULT_ADDRESS queue. Abstract listings in this queue are assigned a generic address, called a default address. To ensure that taxes can be calculated or collected for the physical address, someone must update the address on these listings with an address that matches the correct tax district.



Situs addresses in your Situs Repository have an effective start and end date. If an address is no longer in effect, it will not validate. Also, if the address in your Situs Repository has the four digit extension on the zip code and the DMV address does not, it will not validate.

Processing Abstracts from the DEFAULT_ADDRESS Queue (continued)



SET THE STAGE

The abstracts that have an address that could not be matched with the one from the DMV upload are waiting in the DEFAULT_ADDRESS queue. You need to process these abstracts by selecting a valid address from your Situs Repository.

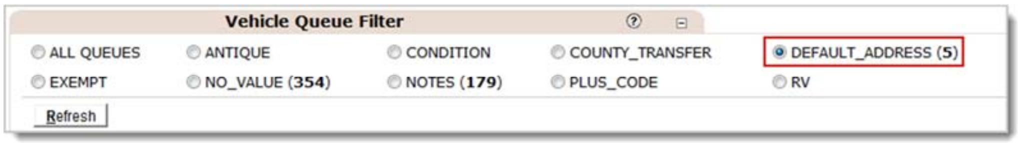
Exercise Steps

1. From the **Workflow** menu, select **Basket View** from the list of [Vehicle Tax Queues].

   The Basket View for Vehicle Tax Queues displays.

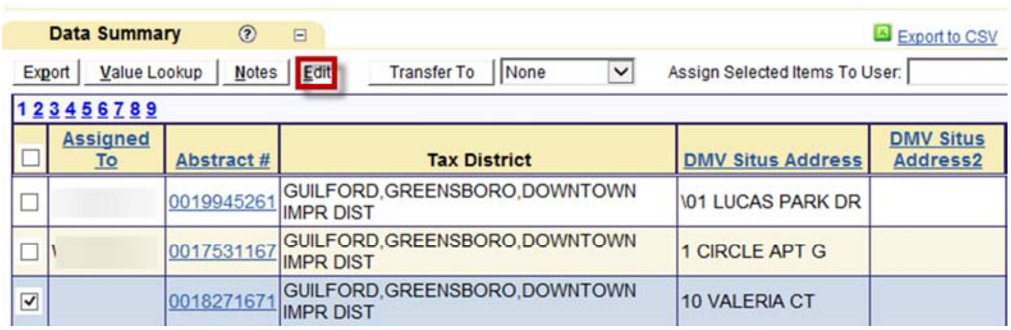
Processing Abstracts from the DEFAULT_ADDRESS Queue (continued)

2. Select the **DEFAULT_ADDRESS** radio button, and then click the **Refresh** button.



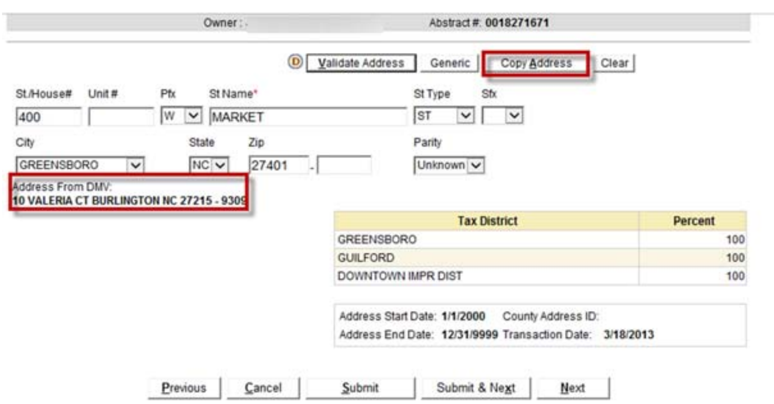
Abstracts in the DEFAULT_ADDRESS queue display in the Data Summary section.

3. Click the checkbox beside the abstract you want to work, and then click the **Edit** button.



The address information displays in a pop-up window.

4. Click the **Copy Address** button to populate the address fields with the address provided by the DMV. Modify the address as needed.



5. Click the **Validate Address** button.

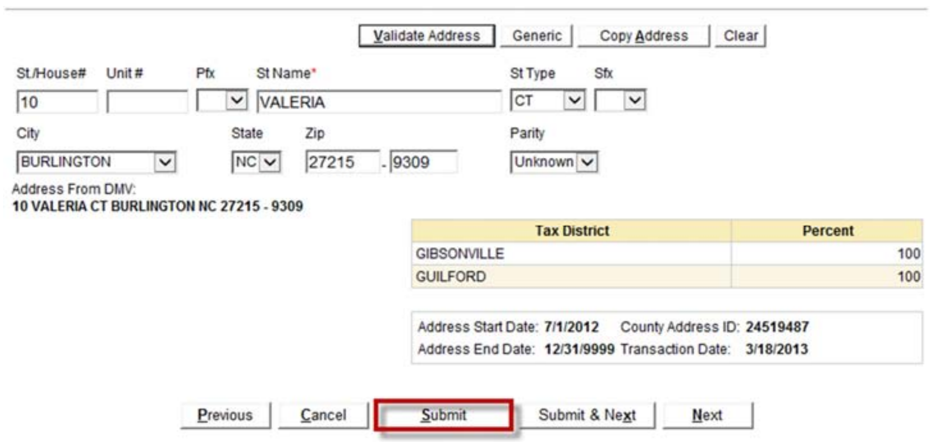
A pop-up window with matching streets displays.

Processing Abstracts from the DEFAULT_ADDRESS Queue (continued)

6. Click the **Select** radio button for the correct address from your Situs Repository.

Select	House#	Unit#	Pre (DIR)	St Name	St Type	Suffix (DIR)	Tax District	Postal Address	Parity
◉	10			VALERIA	CT		GUILFORD,GIBSONVILLE	27215 9309 BURLINGTON	UNKNOWN
○	20			VALERIA	CT		GUILFORD,GIBSONVILLE	27215 9309 BURLINGTON	UNKNOWN
○	30			VALERIA	CT		GUILFORD,GIBSONVILLE	27215 9309 BURLINGTON	UNKNOWN

7. Click the **Submit** button in the search window



The search window closes and the selected address displays in the fields

8. Click the **Submit** button at the bottom of the pop-up window.

Processing Abstracts in the COUNTY_TRANSFER Queue

An abstract can be moved from one county to a different county by using the County Transfer functionality. The user selects the county to which they wish to transfer the abstract. The abstract is removed from the source county and sent to the target county with the active default address. County Transfer can only be used for unbilled abstracts.

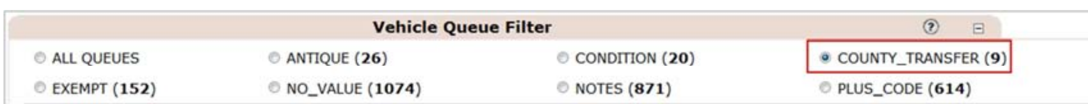
SET THE STAGE

A taxpayer received a bill showing they lived in another county, but they actually live in in your county. The county transferred the abstract to your county and you need to accept it.

Exercise Steps

1. From the **Workflow** menu, select **Basket View** from the list of [Vehicle Tax Queues].

Select the **COUNTY_TRANSFER** radio button, and then click the **Refresh** button.



Abstracts in the COUNTY_TRANSFER queue display in the Data Summary section.

2. Click the checkbox beside the abstract you want to work, and then click the **Edit** button.

Processing Abstracts from the COUNTY_TRANSFER Queue (continued)

3. Clear the address, and then type the name of the street in the **St. Name** field.

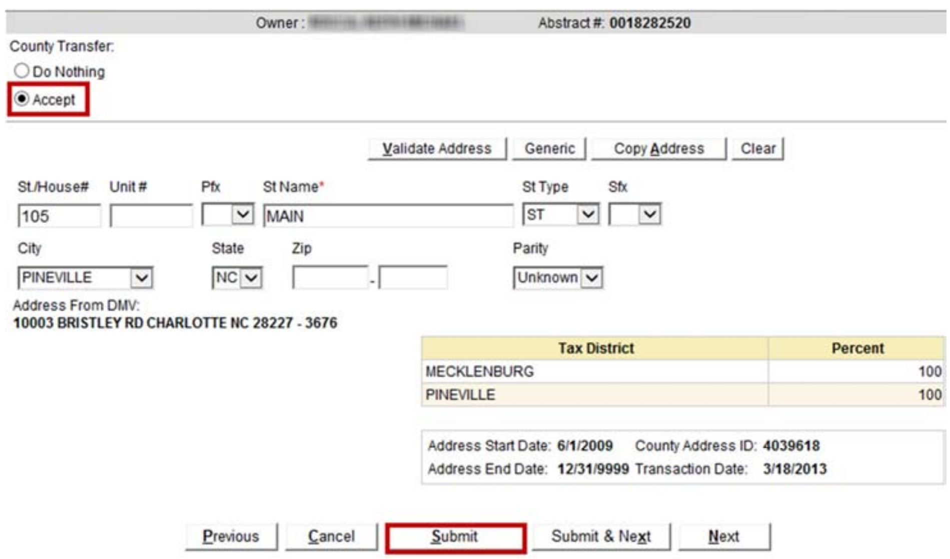
4. Click the **Validate Address** button.

The list of matching addresses displays.

5. Select the correct address and click the **Submit** button.

The address is validated.

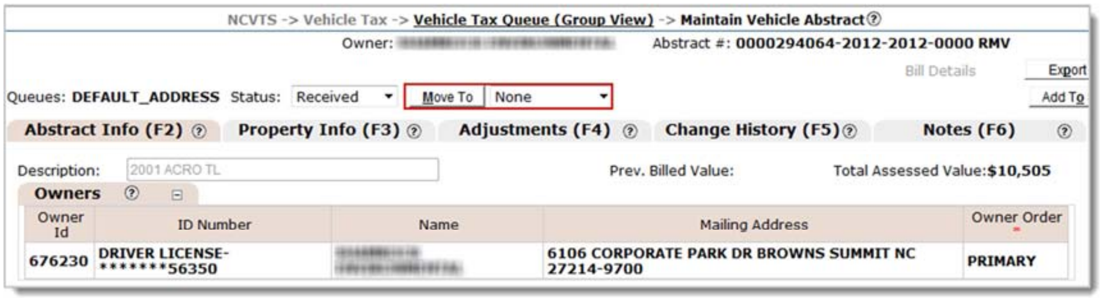
6. Select the **Accept** radio button, and then click the **Submit** button.



The Basket View displays; the number for the COUNTY_TRANSFER queue decreases by one and the abstract has been cleared from the list.

Transferring an Abstract to another County

When an abstract comes in to your county from the DMV Upload process but belongs to a different county, you have the ability to transfer (move) it to the correct county. You can only transfer abstracts before they are billed.



An abstract in the DEFAULT_ADDRESS queue should actually be in a different county. Using the Move To option on the abstract, you transfer the vehicle to Pitt county.

Steps

1. From the **Workflow** menu, select **Basket View** from the list of [Vehicle Tax Queues].

   The Basket View for Vehicle Tax Queues displays.

2. Select the **DEFAULT_ADDRESS** radio button, and then click the **Refresh** button

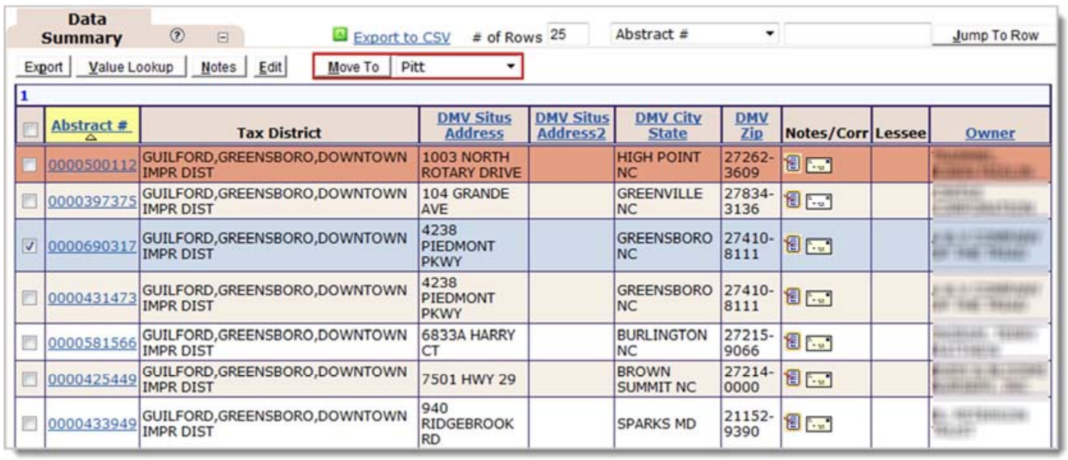
   Abstracts in the DEFAULT_ADDRESS queue display in the Data Summary section.

Transferring a Vehicle to another County (continued)

You can transfer multiple records to the same county at one time. Select the checkbox for all records you want to move, and then use the transfer functionality. You can also transfer a vehicle from the Abstract Detail page.

3. Click the checkbox for the record or records you want to transfer.

4. Select **Pitt** from the drop-down list, and then click the **Move To** button.



If the Move To Button and County List are not Available

Only pre-billed abstracts in a status of Received can be moved to another county. If you need to move an abstract and it is not in a Received status, you must put the abstract in the correct status by following these steps:

1. Open the abstract record.

2. Click the **Make Not RFB** button.

3. Change the status to **Received**.

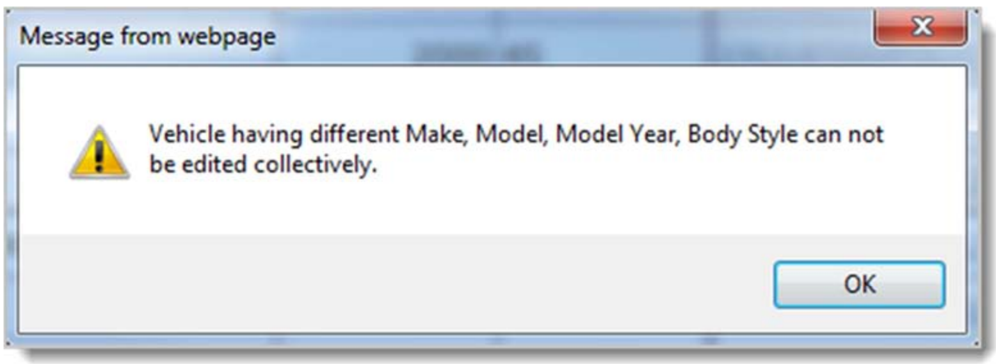
4. Click the **Submit** button.

The abstract is now in a Received status and the transfer functionality is available.

Processing Multiple Abstracts

Reviewing abstracts allows you to work more efficiently. As you review abstracts in the DEFAULT_ADDRESS queue, consider if a new address must be added to your repository or if an abstract should be transferred to another county.

Multiple abstracts may be worked at the same time under specific conditions. For example, you can accept the Antique status for many abstracts in the ANTIQUE queue without restrictions. Other queues, such as the NO_VALUE queue, require that abstracts share the same Make, Model, Model Year and Body Style to be worked together. If you attempt to work multiple abstracts in a single queue that do not share these criteria, you will receive the following message:



SET THE STAGE

A group of abstracts is in the DEFAULT_ADDRESS queue that all belong to the same owner. To save time, you decide to work these abstracts together.

Exercise Steps

1. From the Workflow menu, select Basket View from the list of [Vehicle Tax Queues]
2. Select the **DEFAULT_ADDRESS** radio button, and then click the **Refresh** button.

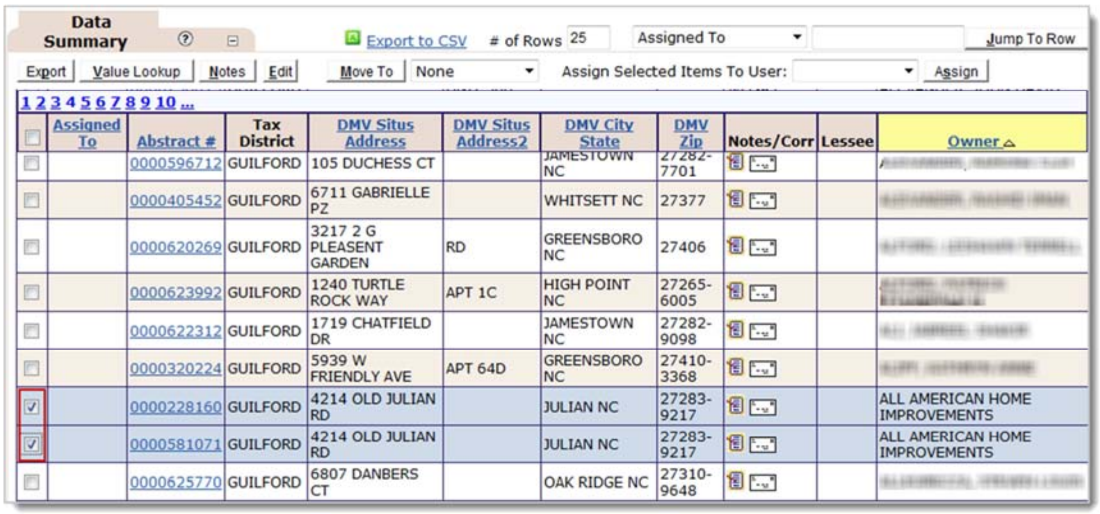
   Abstracts in the DEFAULT_ADDRESS queue display in the Data Summary section.
3. In the Data Summary section, click the **Owner** column heading.

   The abstracts are sorted by owner.

Processing Multiple Abstracts (continued)

4. Scroll down until you find a group of abstracts with the same owner.

5. Select checkboxes for all records that have the same owner and DMV Situs Address



6. Click the **Edit** button at the top of the Data Summary section.

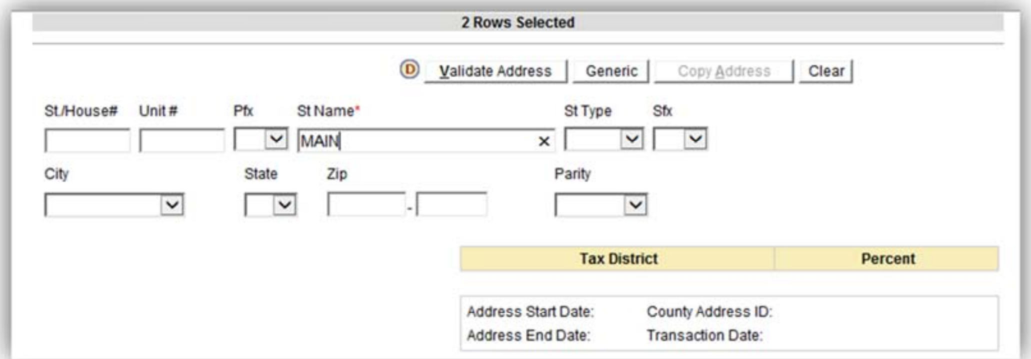
The pop-up window for address validation displays.

7. Click the **Clear** button at the top of the page.

The default address is cleared.

Processing Multiple Abstracts (continued)

8. Type the name of the street in the **St. Name** field.



9. Click the **Validate Address** button.

The matching addresses from your Situs Repository display in a pop-up window.

10. Select the radio button for the desired address.

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

Select	House#	Unit#	Pre (DIR)	St Name	St Type	Suffix (DIR)	Tax District	Postal Address	Parity
○	600			MAIN			GUILFORD, HIGH POINT	GREENSBORO	UNKNOWN
○	1034			MAIN			GUILFORD, HIGH POINT	HIGH POINT	UNKNOWN
○	1109			MAIN			GUILFORD, HIGH POINT	GREENSBORO	UNKNOWN
○	1347			MAIN			GUILFORD, HIGH POINT	HIGH POINT	UNKNOWN
○	1506			MAIN			GUILFORD, HIGH POINT	HIGH POINT	UNKNOWN
○	1525			MAIN			GUILFORD, HIGH POINT	HIGH POINT	UNKNOWN
○	1540			MAIN			GUILFORD, HIGH POINT	HIGH POINT	UNKNOWN
○	1900			MAIN			GUILFORD, HIGH POINT		UNKNOWN
○	2801			MAIN			GUILFORD, HIGH POINT	SUMMERFIELD	UNKNOWN
○	2860			MAIN			GUILFORD, HIGH POINT	HIGH POINT	UNKNOWN
○	2907			MAIN			GUILFORD, HIGH POINT		UNKNOWN
○	100			MAIN	ST		GIBSONVILLE, GUILFORD	GIBSONVILLE	UNKNOWN
◉	100			MAIN	ST		GUILFORD, JAMESTOWN	JAMESTOWN	UNKNOWN

11. Click the **Submit** button, and then click the **Submit** button again.

The selected address is linked and the records are cleared from the DEFAULT_ADDRESS queue.

Understand the Situs Repository

Before going live on NCVTS, each county provided their list of physical addresses to the NCVTS vendor who then loaded them into the system. As we have mentioned many times now, this list of all your physical addresses is known as your Situs repository. When the DMV Upload runs on the last Saturday of the month, the addresses sent by the DMV are compared to the addresses in your Situs repository in NCVTS. The more your Situs repository matches with the DMV, the more accurate your taxation will be and the less work you will have in processing the DEFAULT_ADDRESS queue.

Two Main Components of an Address in NCVTS

An address in your Situs repository consists of two main parts:

1. The Street Name. This must exist first in the Street Dictionary before the addresses for the street can be added to the Situs Repository.
2. The Situs Address. Using the Street Name from the Street Dictionary, the Street Address includes the street number or number range, any prefixes and suffixes, the street name, the city, the zip code, and associated tax districts. Each address is effective dated, meaning that an address is valid as of a starting date through a set end date.

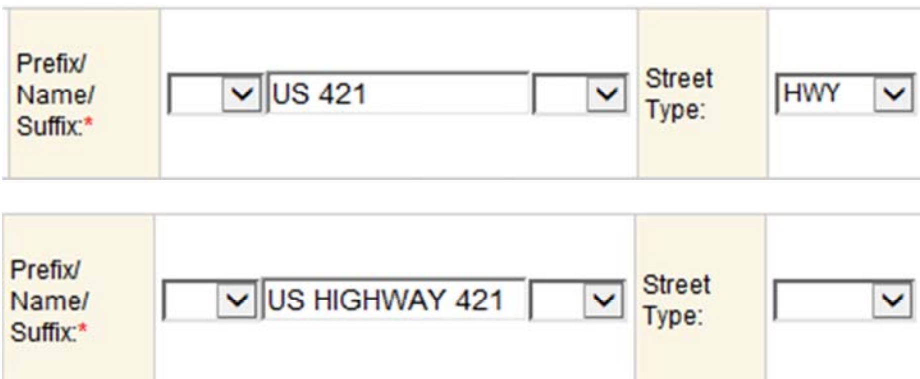
Each county will determine whether they use address ranges or exactly match the DMV addresses with entries in their Situs repository. Whether a county uses exact matches or not, when an address is validated on an abstract, the Situs address on the abstract will now be associated to the DMV address it was validated against.

Adding and Updating Streets

Every Situs address in your county's Situs repository is based on a Street Name. If the Street Name does not exist in NCVTS, you must add it to the Street Dictionary before you can add the individual addresses.

Adding a Situs Address for a Highway

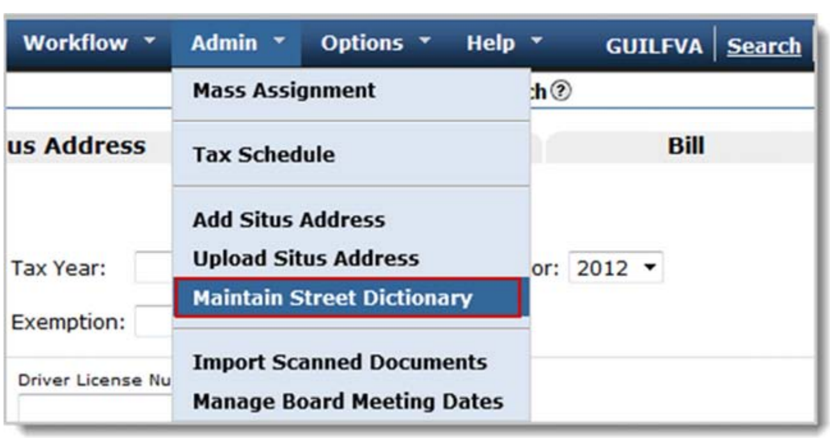
When adding a situs address for a highway, use a street type of HWY <u>or</u> add highway to the street name field and leave the street type blank. For example, U.S. Highway 421 could be entered as follows:



If highways are entered in multiple ways in your situs repository, you can create an alias address to associate different versions of the street names to one another. Refer to pg. 90 for instructions on how to create an alias address.

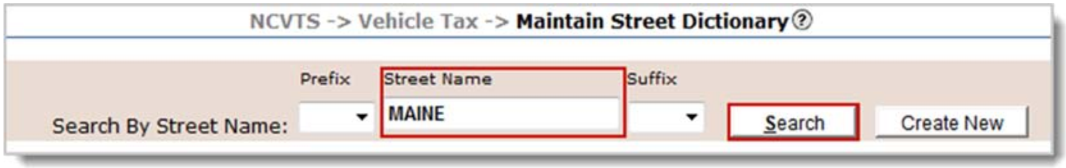
Exercise Steps

1. From the **Admin** menu, select **Maintain Street Dictionary**.



If you have added an abstract to your service cart that needs address validation, you have a running list of addresses that you need to add to your Street Dictionary and/or Situs Repository.

2. Type the name in the **Street Name** field, and then click the **Search** button.

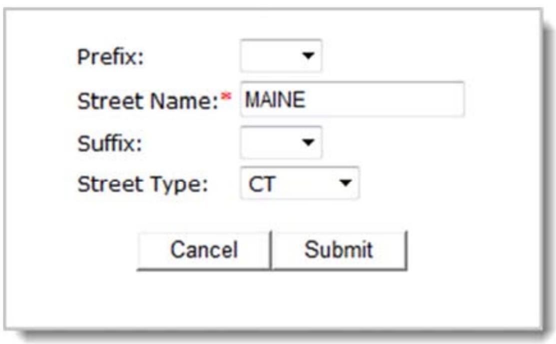


The Street Name is not found.

3. After confirming the Street Name does not exist already, click the **Create New** button.

   Fields allowing you to add the Prefix, Suffix, and Street Type display.

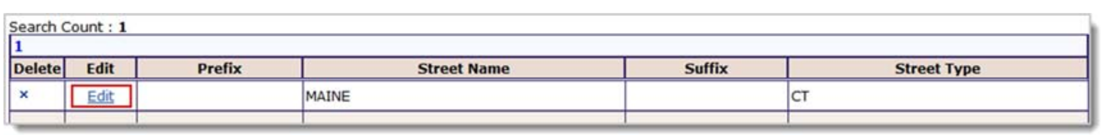
4. Select values to define the street.



5. Click the **Submit** button.

   The record is added to your Street Dictionary.

6. Click the **Edit** link.



Search Count : 1

1

Delete	Edit	Prefix	Street Name	Suffix	Street Type
×	Edit		MAINE		CT

7. Change the street as desired, and then click the **Submit** button.

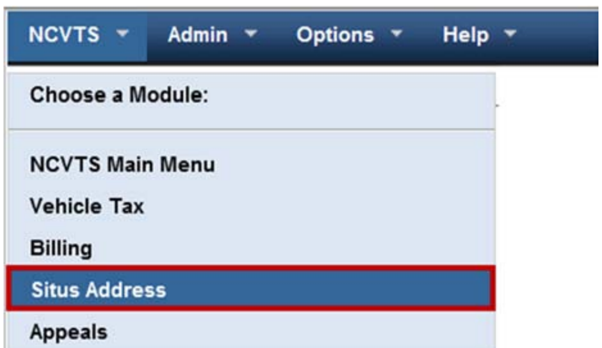
   The record is modified in your Street Dictionary.

Finding the Next Available County Address ID Number

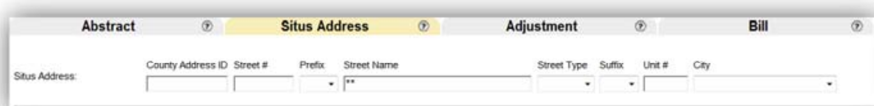
Every Situs address street number or range will need a unique County Address ID Number. Follow the steps below to find the last county address ID number used.

Exercise Steps

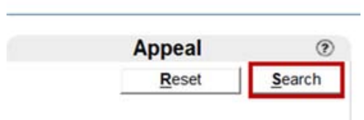
1. From the **NCVTS** menu, select **Situs Address**.



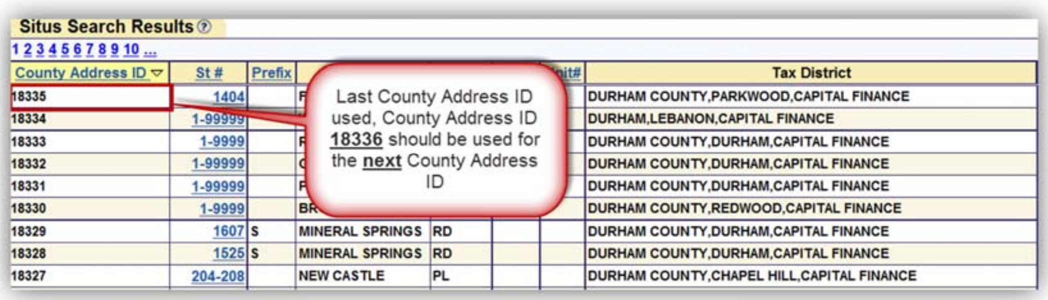
2. Enter in two “**” symbols into the Street Name search field



3. Click the **Search** button



4. Click the County Address ID header twice to sort in descending order



The County Address ID number at the top of the list is the last County Address ID used. When creating a new address, the last County Address ID used should be increased by “1”.

Adding and Update Situs Addresses

One method of maintaining your Situs repository is to manually add addresses to NCVTS. Whether a new street was added in your county or you realized that you missed one that has come through on an abstract during the DMV Upload, you can add them to NCVTS if you have the necessary permissions.

Each county has their own set of County Address IDs. If you do not know the correct County Address ID for a new address, contact the person in your county who is responsible for creating and maintaining these IDs. Do NOT make up a County Address ID number.

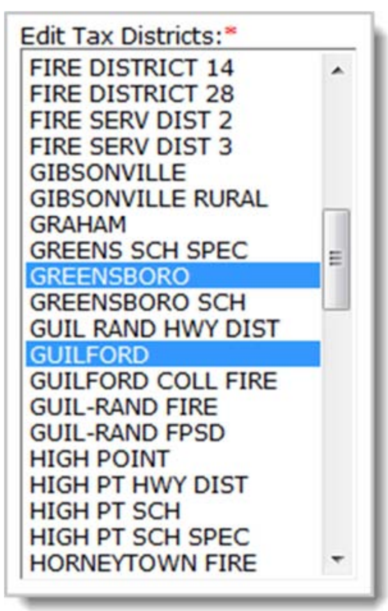
Be sure to type the exact street name, including suffix, prefix, and type, as it appears in your Street Dictionary.

Exercise Steps

1. From the **Admin** menu, select **Add Situs Address**.

2. Type and select values to define a new street address in NCVTS.

3. Click on the names of the tax districts that should be associated with the address.



To select multiple tax districts, press and hold the Ctrl key and then click each district you want to associate to the address.

Adding and Update Situs Addresses (continued)

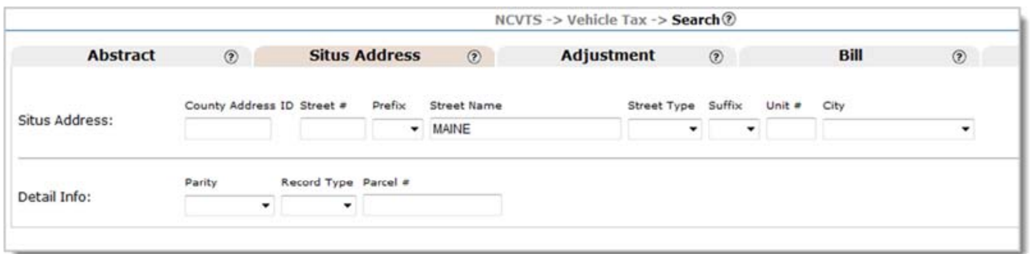
4. Click the **Submit** button.

The new address is added to your Situs repository.

5. Click the **Search** link in the upper right of NCVTS.

The Search page displays.

6. Click the **Situs Address** tab, and then type in the **Street Name**.



7. Click the **Search** button.

The Address displays.

Adding Aliases for Situs Addresses

There are cases where an address is known by multiple names or multiple spellings. In these situations, you can create an alias that is associated with the Situs address.

When you create an alias, you are basically associating a new Situs address, minus tax jurisdictions, with an existing Situs address. After an alias is created, it can be selected and validated on an existing abstract. It is also included in the DMV Upload process and would allow an alternate spelling or naming of a street address to be matched. In other words, creating aliases will further reduce the number of abstracts appearing in the DEFAULT_ADDRESS queue each month.

Exercise Steps

1. Click the **Search** link in the upper right of NCVTS.

   The Search page displays.

2. Click the **Situs Address** tab, and then type in the **Street Name** of the street for which you need to create an alias.

3. Click the **Search** button.

4. From the Situs Address search results, click the value in the **St #** column.

10220	101-519	E	MAIN	ST		
10212	101-519	E	MAIN			

   The Add/Edit Address page displays.

Adding Aliases for Situs Addresses (continued)

5. On the Add/Edit Address page, enter the name of the alias address you want to create and click the **Create Alias** button.

6. Click the **Submit** button.

The alias is created.

Once you upload your situs file, it is recommended to review the NCVTS logs for errors. Refer to the Viewing and Reassigning log section for instructions on how to access and review these logs.

Best Practice: Perform a Situs Upload on the training environment first. Contact DOR when your file is ready.

For more information on how to build a situs file and on the situs file format, please refer to appendix C.

Additional documentation on situs files can also be found on the NCVTS Customer Portal/Solutions

Uploading a Situs File
INSTRUCTOR DEMONSTRATION ONLY

Rather than adding and modifying situs addresses one at a time manually, an alternate option is to perform a situs upload. When you upload a situs file, you are telling NCVTS which situs addresses you want to add to your situs repository and which existing addresses you want to retire.

After the upload runs, if any errors occurred during the process, you can view those errors through an on-screen log.

Steps

1. From the **NCVTS** menu, select **Situs Address.**
2. From the **Admin** menu, select **Upload Situs Address**.
3. Click the **Browse** button, navigate to the file, and select it.
4. Click the **Upload** button.

Downloading a Situs File
INSTRUCTOR DEMONSTRATION ONLY

You can download the current situs file being used in NCVTS in order to make changes and updates and upload at a later date.

Steps

1. From the **NCVTS** menu, select **Situs Address**.
2. From the **Admin** menu, select **Download Situs Address**.
3. Click the **Download Situs File** button
4. Follow prompts to either Open or Save the situs file.

Viewing and Reassigning Logs
INSTRUCTOR DEMO ONLY

When batch processes are run, events from the process are output to a log. These events include when a process began, when it ended, the number of records that were added or updated, and any errors that occurred. Each of these events is recorded as a separate log entry, assigned to the person who uploaded the processed file.

Refer to Appendix D for a definition of Situs Error Log types.

Steps

1. From the **Workflow** menu, select **Reassign Log**.
2. Enter or select the desired search criteria.
3. Click the **Refresh** button.

   The logs display.

4. Select a checkbox to assign the log to a user, and then select the user in the **Reassign User** column.
5. Click the **Update** button. The log is reassigned.

NCVTS supervisors and administrators can use the logs to see if any errors were in the file and to correct the addresses that did not work.

Steps

1. From the **Workflow** menu, select **My Log**.
2. Filter by Log Type and/or date range
3. Click the **Refresh** button.
4. Review log for errors

MODULE 3:

ADJUSTMENTS, PRORATIONS, AND REFUNDS

FARRAGUT

Chapter 1: Creating Adjustments based on Taxpayer Request

At the end of the month, the batch billing process runs and all abstracts from the current month's DMV Upload are billed. In this chapter, we will be creating adjustments to previously billed abstracts. In most cases, adjustments will require approval, so we will also review and approve/reject adjustments.

Objectives

- Understand the adjustment process
- Understand appeals vs. adjustments
- Search for and review an existing adjustment
- Create an adjustment based on a military exemption
- Create an adjustment to decrease vehicle value due to high mileage
- Create an adjustment to decrease vehicle value due to condition
- Approve or reject adjustments

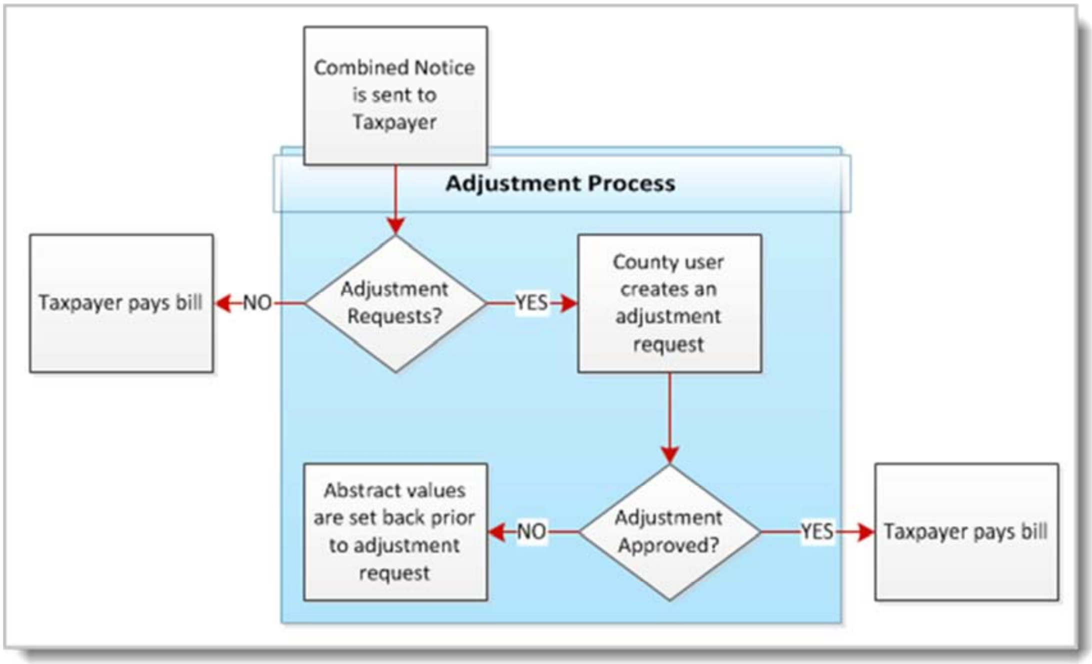
The Adjustment Process

Approved adjustments: If the bill was unpaid, a new bill is generated overnight and mailed to the taxpayer.

The taxpayer may also pay the newly adjusted bill the same day. STARS is updated in real time and if the bill is paid before the overnight process, a new bill will not be mailed to the taxpayer.

Once the Batch Billing Process runs at the end of the month, any changes to the abstract are made as adjustments. Adjustments typically go through an approval process, although each county can configure NCVTS to allow automatic approval of adjustments below a set dollar amount.

An abstract may have one or more pending adjustments waiting for approval. Approved adjustments are reflected on the abstract while pending and rejected adjustments appear on the Adjustments tab of the Maintain Vehicle Abstract page.



Appeals vs. Adjustments

While the majority of counties will create adjustments in NCVTS when a taxpayer appeals their bill, there is a set of features in NCVTS specifically for formal appeals.

In NCVTS, the Appeals feature includes separate appeal records, scheduling, and multiple levels of review/approval. Since we anticipate that most counties will not track appeals to this level in NCVTS, this training course will not cover Appeal records, workflows, etc.

If you want more information on the Appeals functionality in NCVTS, please refer to the *NCVTS User Manual Chapter 8*.

Searching for and Reviewing an Existing Adjustment

You can also see a list of all adjustments in a pending status through either the Adjustments Pending Queue or by searching on the Adj Pending status from the Abstract Search page. .

Any adjustment created in NCVTS can be located and viewed from the Adjustment tab of the main Search page. This search option allows you to find adjustments based on who created them, when they were created, when they were processed, and by current status.

When using the Adjustments tab of the Search page, you are presented with a list of adjustments that meet your criteria. All adjustments for an abstract appear on the Adjustments tab of the Maintain Vehicle Abstract page.

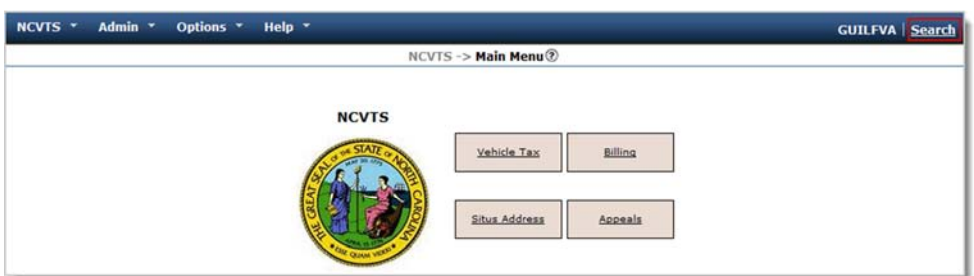
SET THE STAGE

You want to see a list of all adjustments that were approved in the last two months. Using the search functionality in NCVTS, you pull a list of all approved adjustments for this time span.

Exercise Steps

We will work with the Adjustments Pending Queue at the end of this chapter.

1. Click the **Search** link in the upper right hand side of the page.

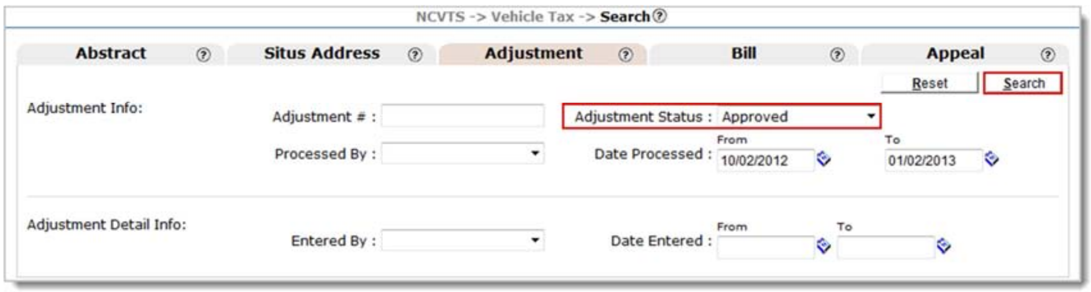


The Abstract Search page displays.

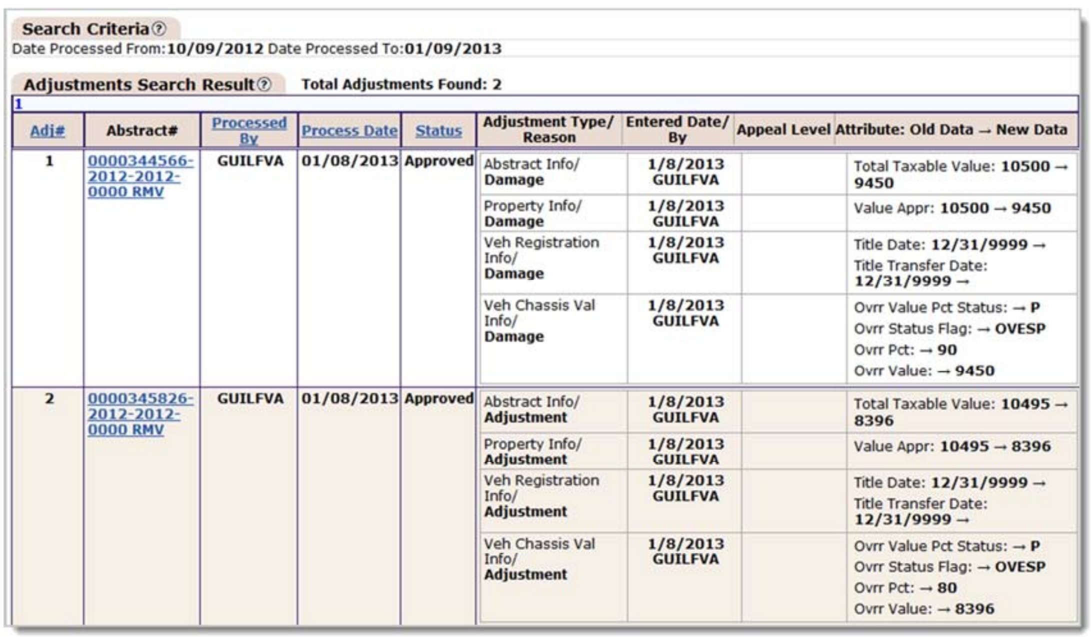
2. Click the **Adjustment** tab.

Searching for and Reviewing an Existing Adjustment (continued)

3. In the **Adjustment Status** field, select the **Approved** status and click the **Search** button.



4. Click a link in the Abstract # field to open the abstract.


Search Criteria
Date Processed From: **10/09/2012** Date Processed To: **01/09/2013**

Adjustments Search Result   **Total Adjustments Found: 2**

Adj#	Abstract#	Processed By	Process Date	Status	Adjustment Type/ Reason	Entered Date/ By	Appeal Level	Attribute: Old Data → New Data
1	0000344566-2012-2012-0000 RMV	GUILFVA	01/08/2013	Approved	Abstract Info/ **Damage**	1/8/2013 GUILFVA		Total Taxable Value: 10500 → 9450
					Property Info/ **Damage**	1/8/2013 GUILFVA		Value Appr: 10500 → 9450
					Veh Registration Info/ **Damage**	1/8/2013 GUILFVA		Title Date: 12/31/9999 → Title Transfer Date: 12/31/9999 →
					Veh Chassis Val Info/ **Damage**	1/8/2013 GUILFVA		Ovrr Value Pct Status: → P Ovrr Status Flag: → OVESP Ovrr Pct: → 90 Ovrr Value: → 9450
2	0000345826-2012-2012-0000 RMV	GUILFVA	01/08/2013	Approved	Abstract Info/ **Adjustment**	1/8/2013 GUILFVA		Total Taxable Value: 10495 → 8396
					Property Info/ **Adjustment**	1/8/2013 GUILFVA		Value Appr: 10495 → 8396
					Veh Registration Info/ **Adjustment**	1/8/2013 GUILFVA		Title Date: 12/31/9999 → Title Transfer Date: 12/31/9999 →
					Veh Chassis Val Info/ **Adjustment**	1/8/2013 GUILFVA		Ovrr Value Pct Status: → P Ovrr Status Flag: → OVESP Ovrr Pct: → 80 Ovrr Value: → 8396

The Maintain Vehicle Abstract page displays.

5. Click the **Adjustments** tab.

The Adjustment information displays.

Creating an Adjustment Due to High Mileage

Approving and rejecting adjustments are covered later in this chapter.

If you need to lower the final value on a billed abstract, you must create an adjustment. Adjustments are created from the Maintain Vehicle Abstract page and, once saved, can be viewed on the Adjustments tab. NCVTS includes functionality that allows you to calculate a vehicle's value based on the vehicle's age and current mileage.

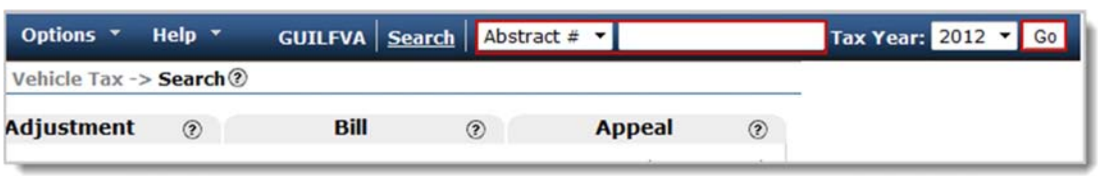
The abstract will not reflect any changes made through an adjustment until the adjustment is approved. You may have the right to approve adjustments yourself, or you may need someone in your county to approve the adjustment after you create it.

SET THE STAGE

After receiving their bill, a taxpayer contacted your office about lowering their vehicle's value based on high mileage. They sent in appropriate documentation of the mileage, so you need to create an adjustment on the previously billed abstract.

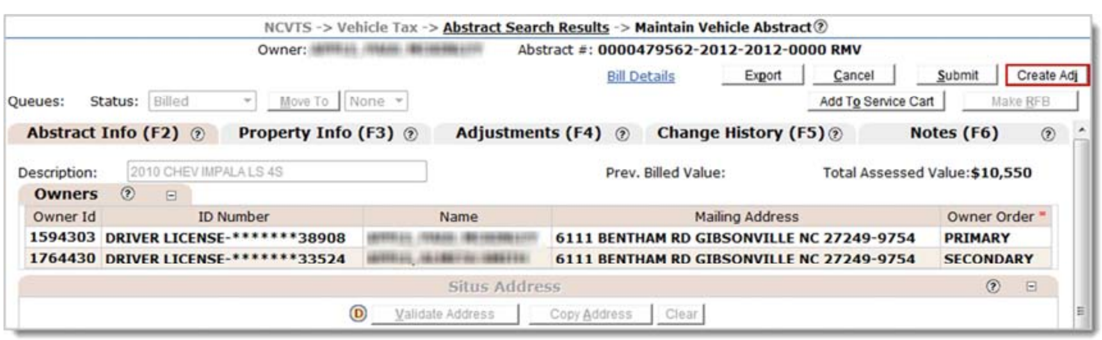
Exercise Steps

1. Type the abstract # in the Quick Search field and click the **Go** button.



The Maintain Vehicle Abstract page displays.

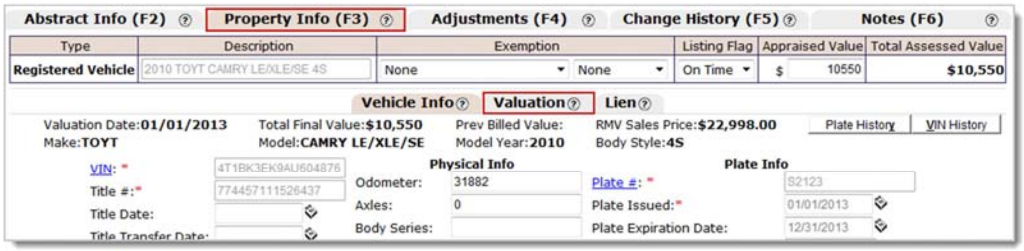
2. Click the **Create Adj** button in the top right of the page.



The fields on the abstract are available. Any changes made to the abstract are considered an adjustment.

Creating an Adjustment Due to High Mileage (continued)

3. Click the **Property Info** tab, and then click the **Valuation** tab.



The Valuation tab displays.

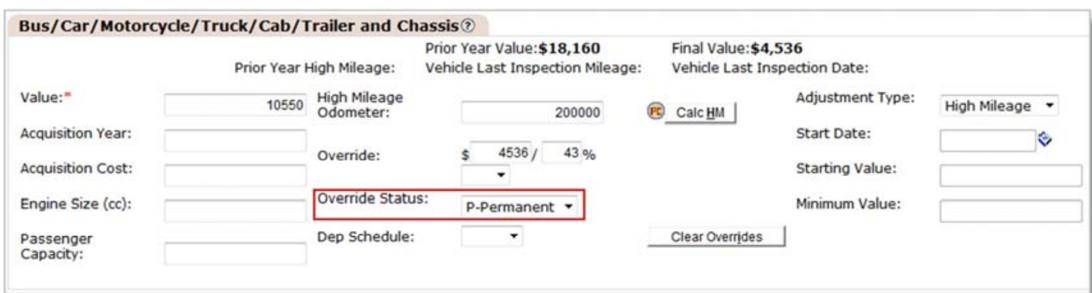
4. Enter or select the following:

Adjustment Type	High Mileage
High Mileage Odometer	[Enter a high mileage based on the vehicle's age]

5. Click the **Calc HM** button to calculate the new value based on mileage.

The Override amount and percentage good display.

6. Select an **Override Status** of **Permanent**.



If you want to review this abstract each year, set the Override Status to Temporary. This abstract will appear in next year's Condition queue.

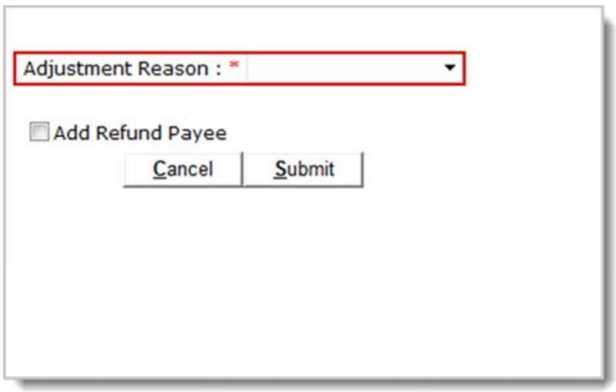
Creating an Adjustment Due to High Mileage (continued)

If you are adjusting an abstract to increase the vehicle's value, you follow these same steps. Be sure to use the Adjustment Type of Add Value.

7. Click the **Submit** button.

   The Adjustment Reason pop-up window displays.

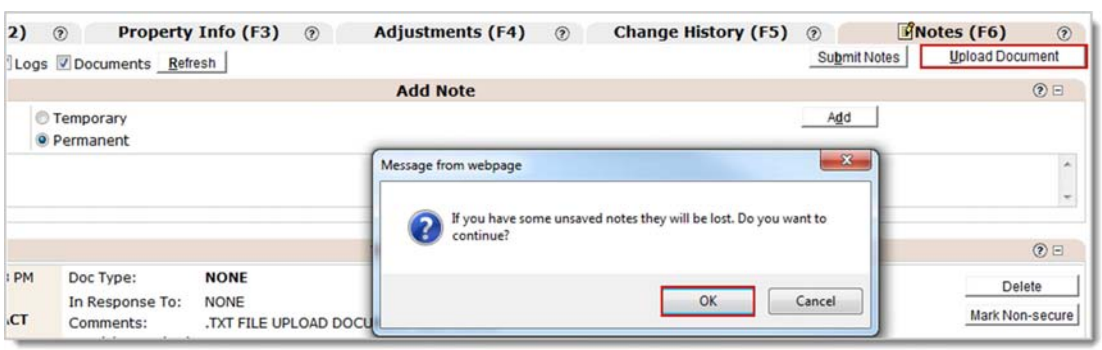
8. Select an **Adjustment Reason**.



9. Click the **Submit** button.

   The decrease in value due to high mileage is saved. The adjustment must be approved before it can be processed.

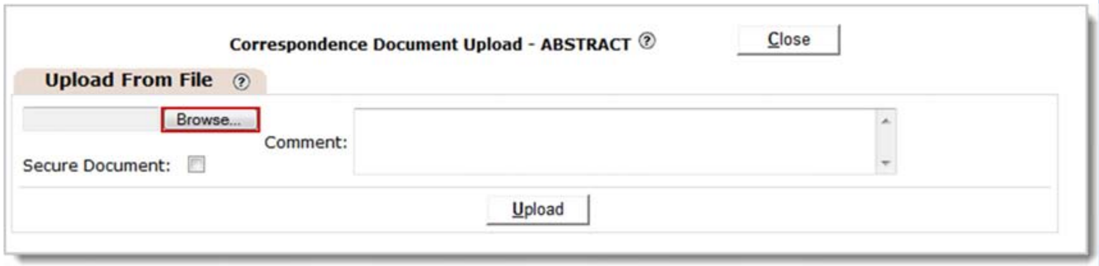
10. Click the **Upload Document** button at the top of the Notes tab, and then click **OK** to bypass the pop-up message.



The Correspondence Document Upload window displays.

Creating an Adjustment Due to High Mileage (continued)

11. Click the **Browse** button, and then select the file you want to upload.

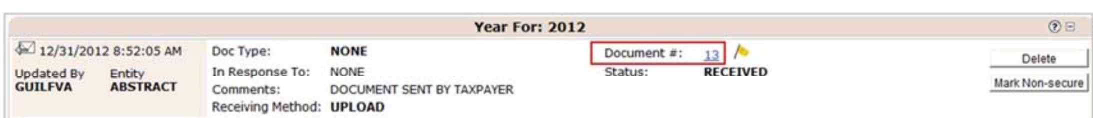


12. Type information in the Comment field and select the Secure Document checkbox.

13. Click the **Upload** button.

A message displays at the bottom of the window informing you the file was uploaded successfully.

14. To open the file on your machine, click the **Document #** link.



15. Follow the prompts to open the file locally, and close the document when finished.

Files with the following extensions can be uploaded to NCVTS:
- .xls
-.xlsx
-.tiff
-.rtf
-.docx
-.pdf
-.txt
-.doc

Confidential documents display a yellow flag next to their link. Marking a document as Secure is information only and does not prevent other users from viewing it.

Create an Adjustment Due to Military Exemption

Exemption options in NCVTS are:

- Charitable owned
- City owned
- County owned
- Education - gov
- Education – non gov
- Education – religious
- Federal owned
- Fire rescue
- Hospital owned
- Military
- Property exempt
- Public service
- Religious owned
- State owned
- Uniform daily rental

Under certain circumstances, a taxpayer can be exempt from paying some or all of the taxes and fees normally owed on a vehicle.

Exemptions are marked as either temporary or permanent in NCVTS. When marking an exemption as permanent or temporary, keep in mind the following:

Temporary Exemptions

- Apply only to the current abstract; future abstracts will be taxed as usual
- Since the exemption is for the entire year, no dates are entered on the abstract

Permanent Exemptions

- If a permanent exemption has no end date, the abstract will appear in next year's EXEMPT queue
- If the permanent exemption has a start and end date, the abstract will not appear in the EXEMPT queue if the bill due date falls within the time of exemption

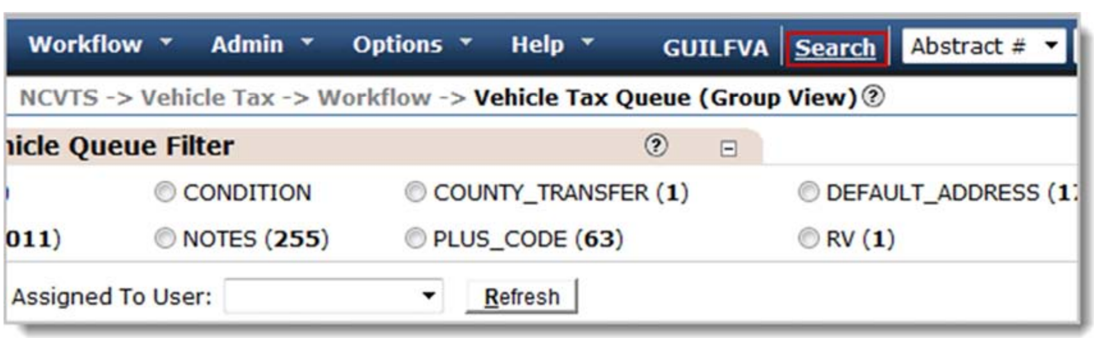
If the exemption is for only a portion of the vehicle's value, all fees for the appropriate tax jurisdictions are applied in full.

SET THE STAGE

The spouse of an active-duty service member has provided their partner's Leave and Earnings Statement and the associated paperwork required for partial exemption from taxes. You need to locate the abstract in NCVTS and update it with the 50% exemption.

Exercise Steps

1. Click the **Search** link in the upper right of the page.



The Abstract Search page displays.

Create an Adjustment Due to Military Exemption (continued)

2. Enter the search criteria for the abstract you want to work, and then click the **Search** button.

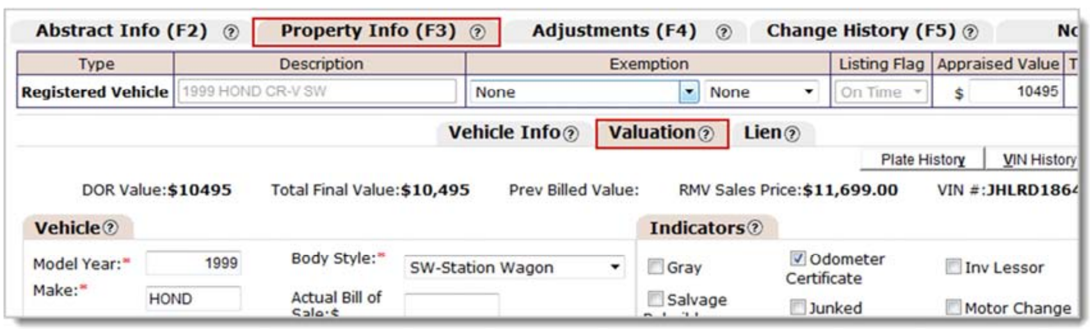
   The Vehicle Tax Search Results page displays.

3. On the Vehicle Tax Search Results page, click the **Abstract #** link of your abstract.

   The Maintain Vehicle Abstract page displays.

4. Click the **Create Adj** button.

5. Click the **Property** Info tab, and then click the **Valuation** tab.

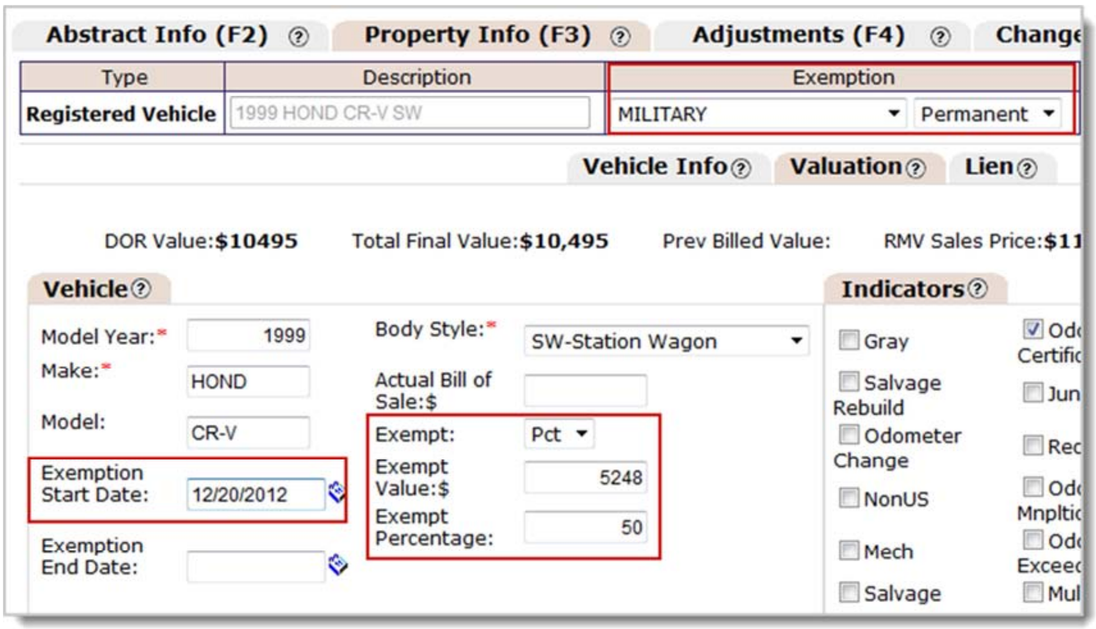


Changes to value or exemption status can be entered before the abstract is billed. If the abstract is in an RFB status, click the Make Not RFB button. The abstract fields will become available.

Create an Adjustment Due to Military Exemption (continued)

6. Enter or select the following:

Exemption	Military Permanent
Exempt	Pct
Exempt Percentage	50
Exemption Start Date	[Enter today's date]



7. Click the **Submit** button at the top right of the page.

8. Select an **Adjustment Reason**.

9. Click the **Submit** button.

Create an Adjustment Due to Condition

When a vehicle's value is impacted by its condition, you should update the abstract to reflect the lower value. In NCVTS, a reduction in value based on a vehicle's condition is entered using an Adjustment Type of Condition. The adjusted value can be set to temporary, which will apply only to this year's abstract, or permanent, which will affect the value of future year's abstracts.

If a vehicle has high mileage and other issues with its condition, you can use the high mileage calculation or simply enter the high mileage and enter/calculate the vehicle's value separately. In other words, you can record the high mileage of a vehicle and not use the value in calculating the new vehicle value.

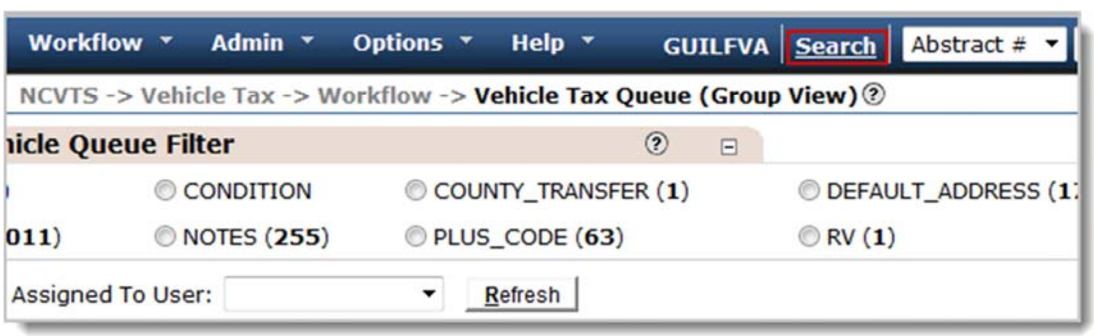
If the Adjustment Type on an abstract is Condition, Add Value, or New Value, a Temporary Override status will cause next year's abstract to populate the Condition queue. This is different from Exemptions, where a status of Permanent will cause next year's abstract to appear in the Exempt queue.

SET THE STAGE

A taxpayer has objected to the value of their vehicle due to its current condition. You need to create an adjustment in NCVTS and lower the value of the vehicle due to its condition.

Exercise Steps

1. Click the **Search** link in the upper right of the page.



The Abstract Search page displays.

Changing Vehicle Value Based on Condition (continued)

If you set the Override Status to Permanent for Condition, Add Value, or New Value adjustments, the value will be fixed for all future abstracts for this VIN until the owner changes. This is the third option if you want to set a minimum value for a vehicle.

2. Enter the search criteria, and then click the **Search** button

   The Vehicle Tax Search Results page displays.

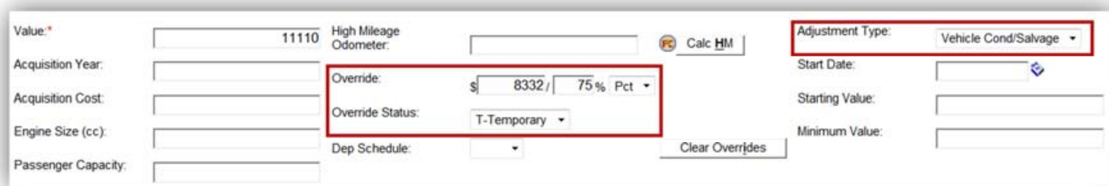
3. Click the **Abstract #** link of your abstract.

   The Maintain Vehicle Abstract page displays.

4. Click the **Property Info** tab, and then click the **Valuation** tab.

5. Enter or select the following:

Adjustment Type	Vehicle Cond/Salvage
Override	Temporary
Override	Pct
Override Percent	75



6. Click the **Submit** button at the top right of the page.

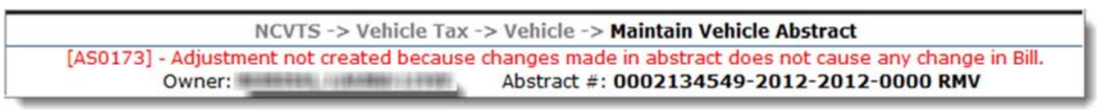
   The Final Value field shows the value used for tax calculations.

Adjustments Types

When creating a condition adjustment, the following Adjustment Types can be selected on the abstract.

Add Value	Use when the vehicle is considered to have features that increase its value.
Vehicle Cond/Salvage	Use when the vehicle is damaged or has a branded title.
High Mileage	Use when the mileage on the vehicle is greater than average.
Sales Price	Sales price is the value of a vehicle purchased from a registered motor vehicle dealer
Starting Date	Use when the adjustment includes the Starting Date, Starting Value, and Minimum Value fields with a set Depreciation Schedule.

If you try to create an adjustment that results in no change to the bill, no adjustment will be created and the abstract will be immediately updated with the changes without going through the usual adjustment approval flow. Users will receive the alert message below:



Creating an Adjustment for a Situs Address Change

If the Situs address is incorrect and the abstract is billed, you can create an adjustment to correct the Situs and tax districts. For example, if you do not work an abstract in the Default Address queue or if a taxpayer moves inside your county, the situs address for the billed abstract will not be correct.

SET THE STAGE

A taxpayer has come into your office because they are questioning their bill. When you open their record, you see that the record was in last month's Default Address queue, but not processed. You need to create an adjustment in NCVTS to correct the address.

Exercise Steps

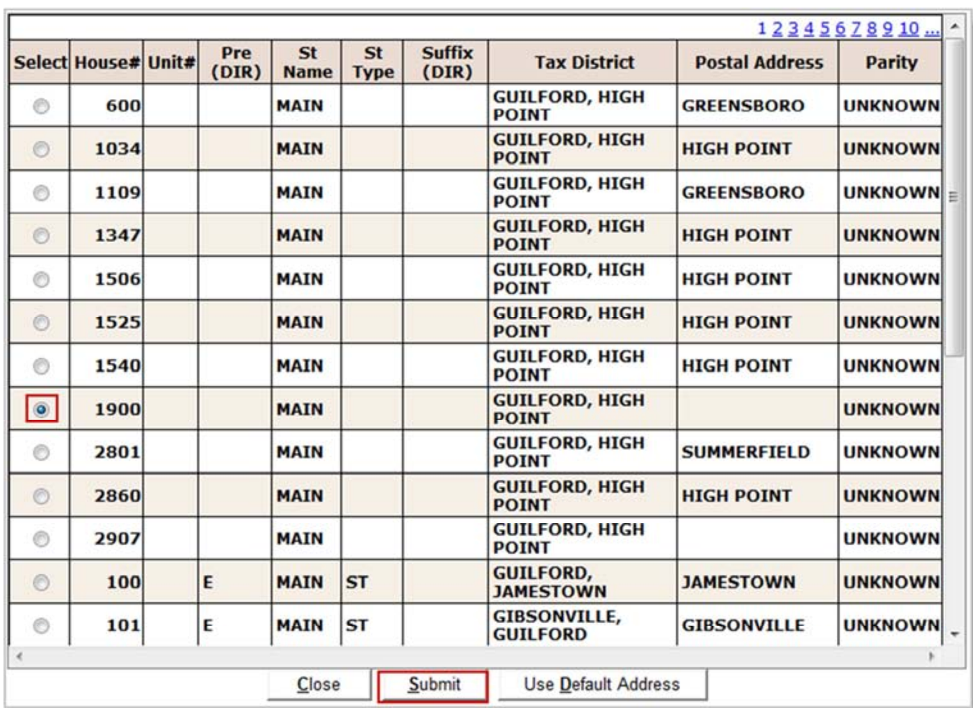
1. Using the Quick Search, open the abstract you need to change the address on.
2. Click the **Create Adj** button.
3. Click the **Clear** button in the Situs Address section.

4. Enter the St. Name of the Situs address.

Creating an Adjustment for a Situs Address Change (continued)

5. Click the **Validate Address** button.

6. Select the radio button for the correct Situs address, and then click the **Submit** button.



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

Select	House#	Unit#	Pre (DIR)	St Name	St Type	Suffix (DIR)	Tax District	Postal Address	Parity
○	600			MAIN			GUILFORD, HIGH POINT	GREENSBORO	UNKNOWN
○	1034			MAIN			GUILFORD, HIGH POINT	HIGH POINT	UNKNOWN
○	1109			MAIN			GUILFORD, HIGH POINT	GREENSBORO	UNKNOWN
○	1347			MAIN			GUILFORD, HIGH POINT	HIGH POINT	UNKNOWN
○	1506			MAIN			GUILFORD, HIGH POINT	HIGH POINT	UNKNOWN
○	1525			MAIN			GUILFORD, HIGH POINT	HIGH POINT	UNKNOWN
○	1540			MAIN			GUILFORD, HIGH POINT	HIGH POINT	UNKNOWN
◉	1900			MAIN			GUILFORD, HIGH POINT		UNKNOWN
○	2801			MAIN			GUILFORD, HIGH POINT	SUMMERFIELD	UNKNOWN
○	2860			MAIN			GUILFORD, HIGH POINT	HIGH POINT	UNKNOWN
○	2907			MAIN			GUILFORD, HIGH POINT		UNKNOWN
○	100		E	MAIN	ST		GUILFORD, JAMESTOWN	JAMESTOWN	UNKNOWN
○	101		E	MAIN	ST		GIBSONVILLE, GUILFORD	GIBSONVILLE	UNKNOWN

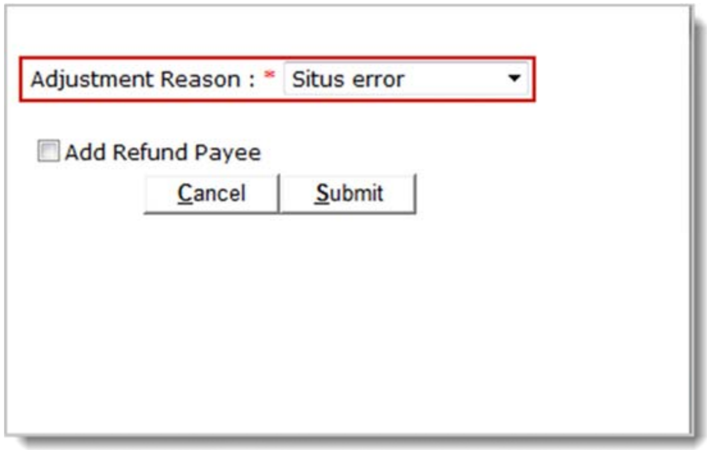
Close | Submit | Use Default Address

7. Click the **Submit** button at the top right of the page.

Creating an Adjustment for a Situs Address Change (continued)

The refund payee information follows the record, but only an indicator is sent to the DMV when the adjustment is approved.

8. Select an **Adjustment Reason**.



9. Click the **Submit** button.

Approving and Rejecting Adjustments

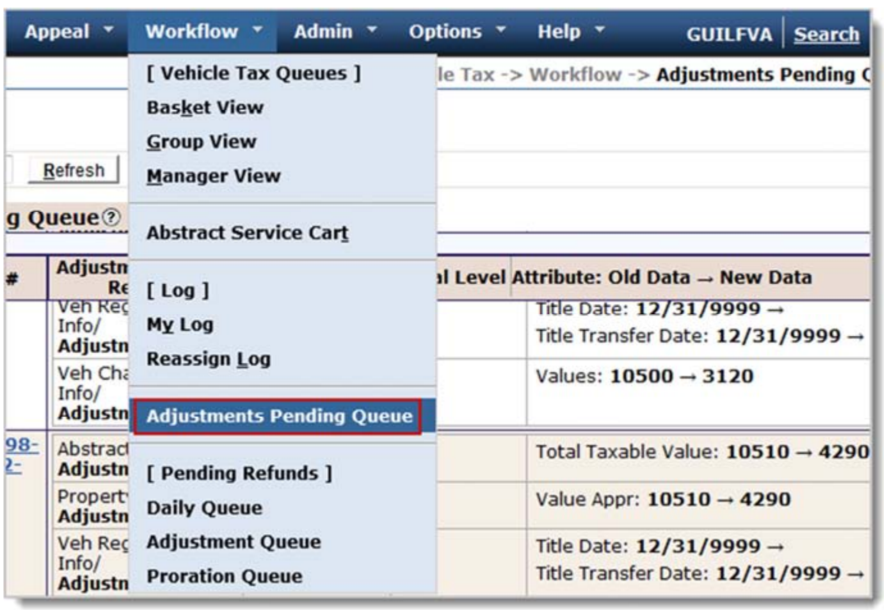
When adjustments to billed abstracts are submitted, they must then be reviewed and approved or rejected. All adjustments pending approval appear in the Adjustments Pending Queue.

SET THE STAGE

A number of adjustments to billed abstracts need review. You need to go review each adjustment and approve or reject them as appropriate.

Exercise Steps

1. From the **Workflow** menu, select **Adjustments Pending Queue**.



The adjustments that need review display.

Depending on your assigned roles in NCVTS, you may not have permissions to approve or reject adjustments. Be sure you know who does have these permissions in your county office.

Each office should discuss with their County Attorney the information that may be legally printed and given to the taxpayer from NCVTS.

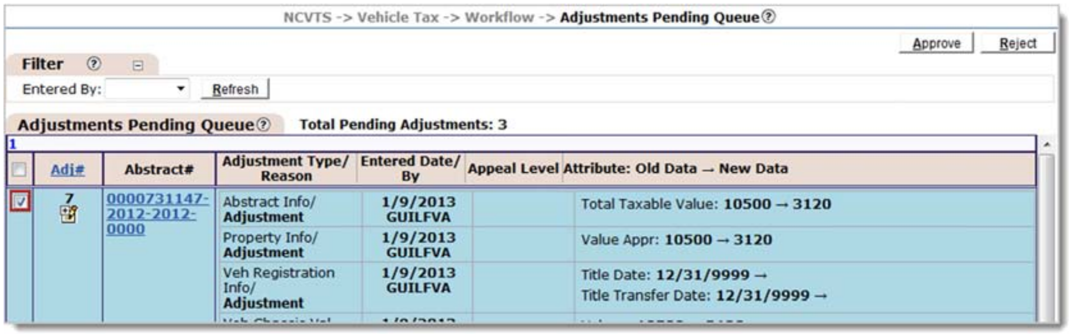
If the bill was paid, a refund is created and is waiting for review. If the bill was unpaid, a new bill is generated and will be mailed to the taxpayer from the DMV.

Taxpayers should be directed to pay new adjusted amount via STARS web service or at DMV/LPA office.

If an adjustment is rejected, the abstract appears as it did before the adjustment was entered.

Approving and Rejecting Adjustments (continued)

2. Select the checkbox for the adjustment you want to approve or reject.



3. Click the **Approve** button.

The adjustment was successfully approved.

Adjustments Before a Bill is Paid

If you enter an adjustment on an abstract for which the bill is unpaid, it is highly recommended that you do not let the taxpayer leave your office until the adjustment is approved in NCVTS. If you do not have the appropriate permissions to approve the adjustment, have someone with the correct permissions approve the adjustment while the taxpayer is there.

Chapter 2: Processing Refunds

Refunds are typically generated due to overpayment of taxes when a bill is either adjusted or prorated. In the previous chapter we covered making adjustments after billing. In this chapter we will first cover how to prorate a bill and then cover how the refund process works.

3 types of refunds may be generated within NCVTS:

- Overpayment
- Adjustment
- Proration

Objectives

- Prorate a bill and generate a refund request
- Reverse a proration
- Understand the Pending Refunds queues
- Authorize an adjustment refund
- Void an authorized refund
- Search for and review an existing refund

Bill Proration

Bill proration occurs when the owner of the vehicle is billed and for whatever reason the number of months the bill due amount is based on, needs to change. Most often vehicle bills need to be prorated when the owner of the vehicle is billed and at later date sells the vehicle or moves out of state. In any case, a bill is prorated when a plate is surrendered and it eithers releases the obligation to pay the due amount, or refund of the payment already made.

Prorating a Bill

SET THE STAGE

A taxpayer notifies DMV that the vehicle being taxed has been sold 6 months after renewing the tag. They ensure they are only charged for the months they owned the vehicle; you will need to prorate their bill.

Exercise Steps

1. Using **Quick Search**, select or enter the following:

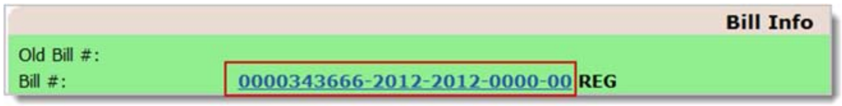
Search Type	Bill #
Bill #	Enter provided #

2. Click the **Go** button.

3. The Bill Search Result page displays.

Prorating a Bill (continued)

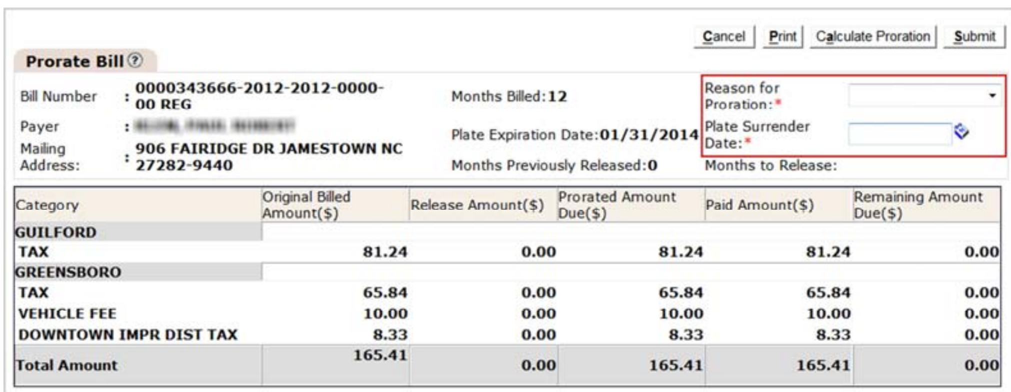
4. Click the **Bill #** link.



The Bill Details page displays.

5. Click the **Prorate Bill** button.

6. The Prorate Bill pop-up window displays.

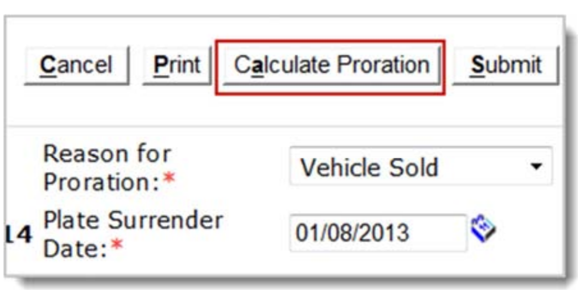


Category	Original Billed Amount($)	Release Amount($)	Prorated Amount Due($)	Paid Amount($)	Remaining Amount Due($)
GUILFORD					
TAX	81.24	0.00	81.24	81.24	0.00
GREENSBORO					
TAX	65.84	0.00	65.84	65.84	0.00
VEHICLE FEE	10.00	0.00	10.00	10.00	0.00
DOWNTOWN IMPR DIST TAX	8.33	0.00	8.33	8.33	0.00
Total Amount	165.41	0.00	165.41	165.41	0.00

7. Select or enter the following:

Reason for Proration	Vehicle Sold
Plate Surrender Date	Today's Date

8. Click the **Calculate Proration** button.



Bills cannot be prorated for periods less than 1 month.

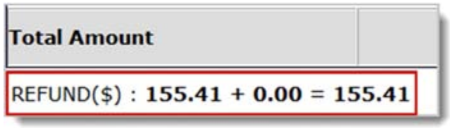
If you want to void a proration, you may do so if it was created today. Click the link in the Trans # column to open a page where you can void the refund.

All corrected bills will display a Ⓒ next to the original billed amount.

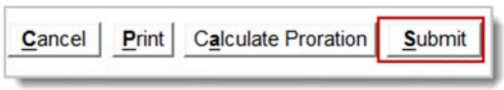
You can make changes to the Refund information page and the refund will be processed accordingly. This change only impacts this transaction. No changes are made to the abstract or bill nor is the information updated in STARS.

Prorating a Bill (continued)

9. The estimated refund is auto-calculated.



10. Click the **Submit** button.



11. Refund information page displays. Click the **Submit** button.

12. Click the **+** in the Transaction Summary section to view the proration.

Transaction Summary

Date	Type	Update User	Trans #	Interest Date	Trans Amount($)
01/23/2013	PAYMENT	VTSSUPP	2345	1/23/2012	176.61
02/01/2013	PRORATION	GUILFVA	47		152.73
02/01/2013	PAYMENT REVERSE	VTSCASHIERING	13125	1/23/2012	176.61
02/01/2013	PAYMENT	VTSCASHIERING	13125	1/23/2012	23.88
02/01/2013	REFUND	VTSCASHIERING	13125		152.73

Printing a Refund

After prorating a bill, you have the option to print the information. The Print button offers the needed functionality to print the information from the page.

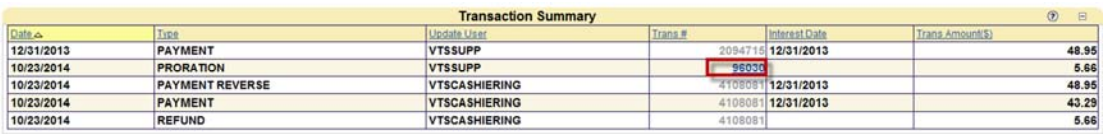
Reversing a Proration

Exercise Steps

1. Using **Quick Search**, select or enter the following:

Search Type	Bill #
Bill #	Enter provided #

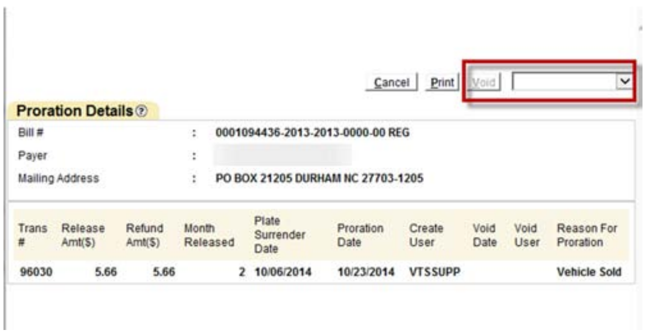
2. Click the **Go** button.
3. Click the Bill Number
4. Open the Transaction Summary tab



Transaction Summary

Date	Type	Update User	Trans #	Interest Date	Trans Amount($)
12/31/2013	PAYMENT	VTSSUPP	2094715	12/31/2013	48.95
10/23/2014	PRORATION	VTSSUPP	96030		5.66
10/23/2014	PAYMENT REVERSE	VTSCASHIERING	4108081	12/31/2013	48.95
10/23/2014	PAYMENT	VTSCASHIERING	4108081	12/31/2013	43.29
10/23/2014	REFUND	VTSCASHIERING	4108081		5.66

5. Click the Proration transaction number
6. Select the reason for voiding the proration



Cancel Print Void

Proration Details

Bill # : 0001094436-2013-2013-0000-00 REG
Payer :
Mailing Address : PO BOX 21205 DURHAM NC 27703-1205

Trans #	Release Amt($)	Refund Amt($)	Month Released	Plate Surrender Date	Proration Date	Create User	Void Date	Void User	Reason For Proration
96030	5.66	5.66	2	10/06/2014	10/23/2014	VTSSUPP			Vehicle Sold

7. Click the **Void** button

Some prorations may be auto-authorized if the refund is below a certain threshold. Before you can reverse a proration, you must wait at least one business day and void the authorization on the refund.

Refer to pg. 129 for instructions on how to void the authorization on a refund.

Refunds must be requested within one year of the plate surrender date (FS-20 receipt / tag turn-in slip)

How to add and edit Board Meeting Dates are discussed in *Module 4*.

Refunds

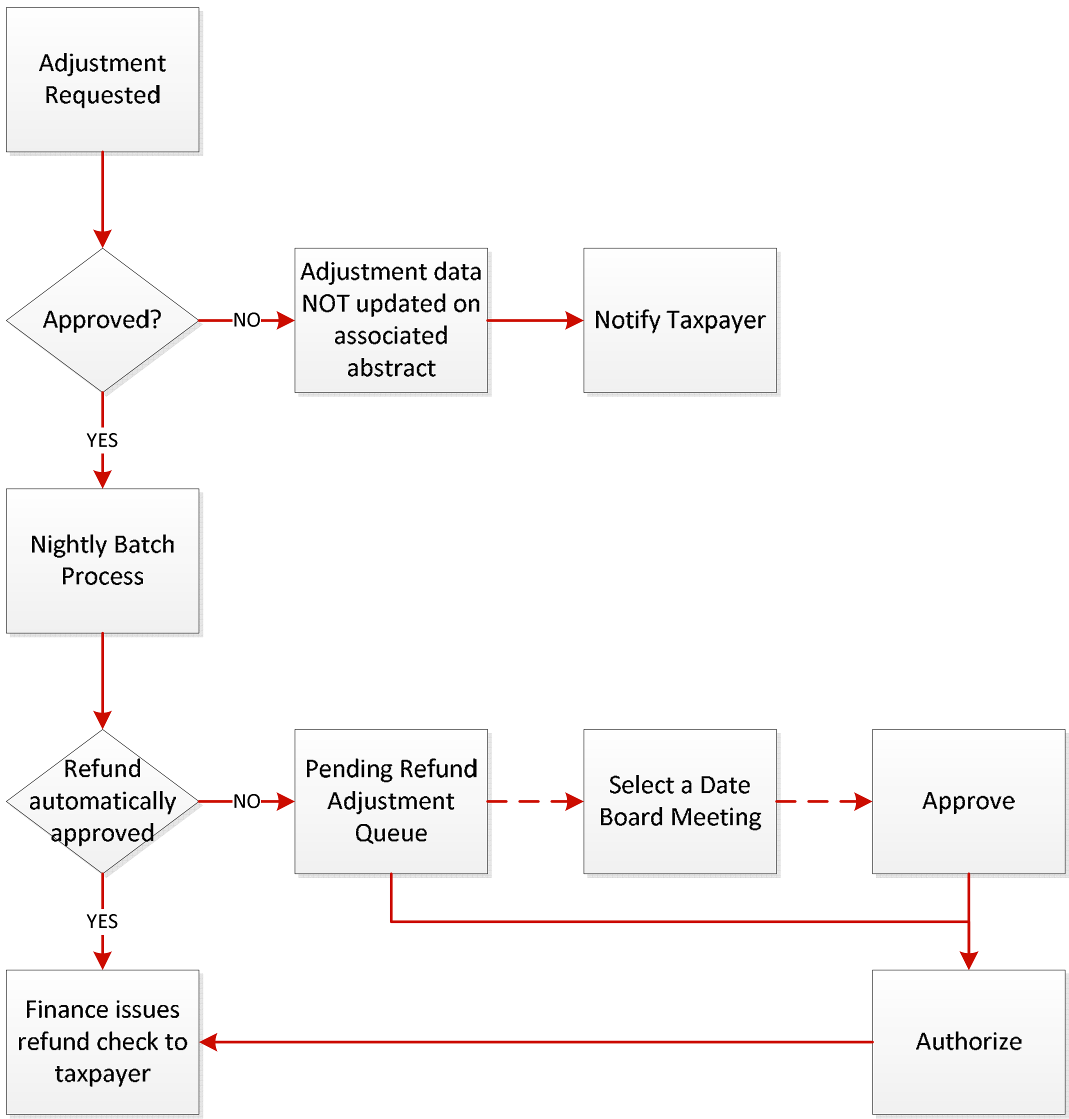
A taxpayer receives a refund when they have overpaid on their taxes. Once a refund request is made, either by an overpayment, approved adjustment, or prorated bill, the refund will be in pending status. Refunds are available for approval in NCVTS after the nightly batch process runs. Refunds that require authorization will be available in the appropriate refund queue. Authorization for refunds may also be automatic in the system if the amount of the refund is below the set minimum amount.

Refunds that do not meet the criteria for automatic authorization will populate in one of three Pending Refunds queues:

- Adjustment
- Daily
- Proration

For adjustment refunds, a board meeting date must be selected before approving the refund.

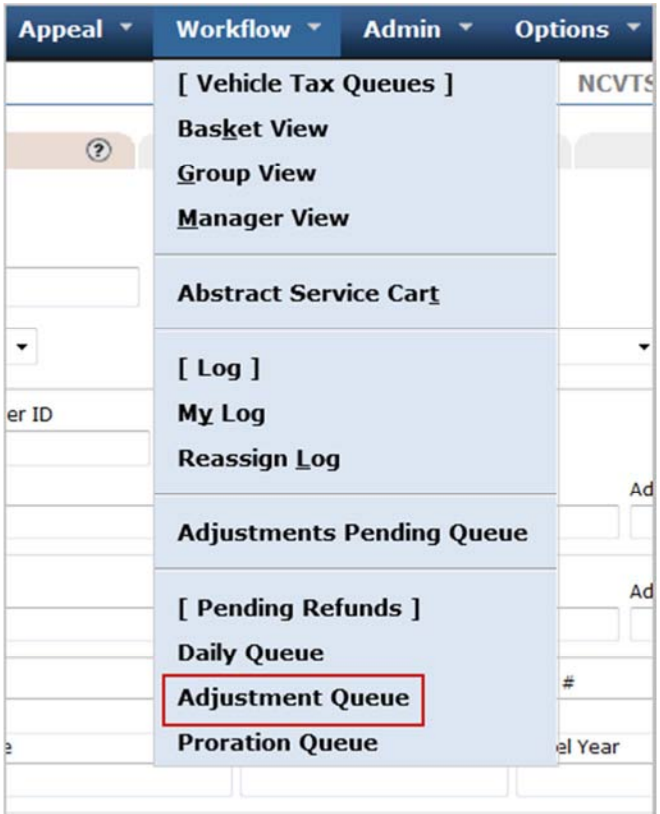
Refunds (continued)



Authorizing an Adjustment Refund

Exercise Steps

1. From the **Workflow** menu, select **Adjustment Queue** from the list of [Pending Refunds].



Authorizing an Adjustment Refund (continued)

2. Click the checkbox for the adjustment record(s) to approve.

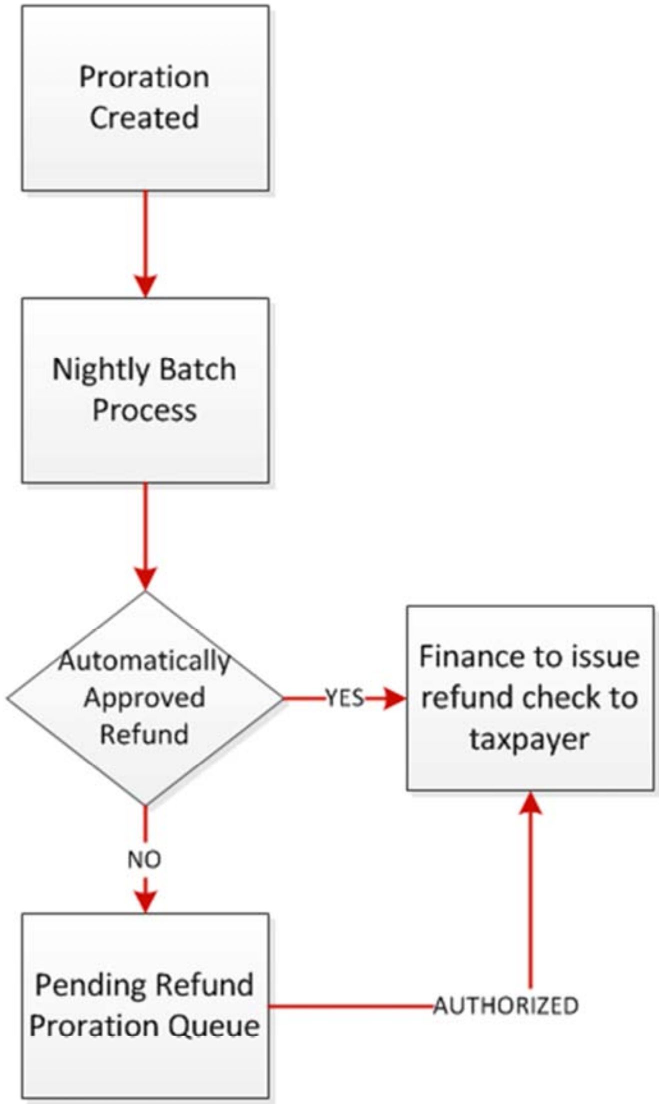
3. Select a Board Meeting Date from the drop-down pick-list and click the **Set Board Date** button.

4. Click the **Approve** button.

5. Click the **Authorize** button.

   The selected adjustment is no longer displayed in the Pending Refund Adjustment Queue.

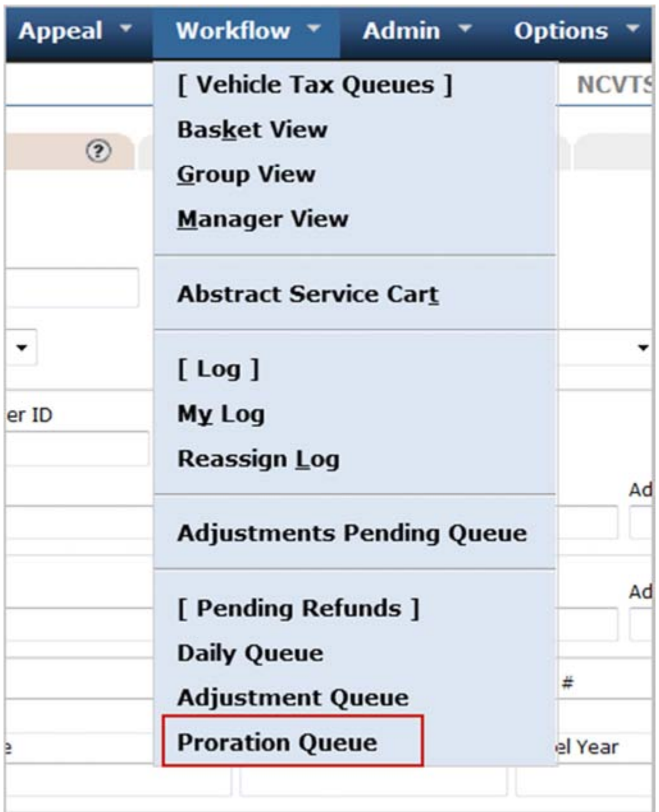
Authorizing a Proration Refund



Approving a Proration Refund (continued)

Exercise Steps

1. From the **Workflow** menu, select **Proration Queue** from the list of [Pending Refunds].



2. Click the checkbox for the adjustment record.

3. Click the **Authorize** button in the top right corner of the page.

   The selected refund is no longer displayed in the Proration Pending Queue.

When you void an authorization the record is populated in the appropriate pending refunds queue with a pending status.

Searching for an Existing Refund

To quickly search through all refunds in NCVTS, use the Refund Search function. In addition to viewing refunds, you may also void an authorization if needed.

Exercise Steps

1. From the **Vehicle** menu, select **Refund Search** from the list.
2. Select the following:

Refund Type	Adjustment
Refund Status	Authorized

3. Click the **Search** button.

Void an Authorized Refund

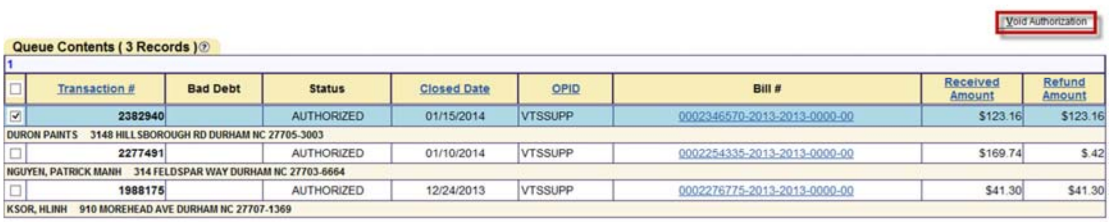
If a refund is authorized in error you can void the refund after performing a refund search.

Exercise Steps

1. From the **Vehicle** menu, select **Refund Search** from the list.
2. Select the following:

Refund Type	Daily
Refund Status	Authorized

3. Click the **Search** button.
4. Select the refund you want to void


Void Authorization

Queue Contents (3 Records)

1

	Transaction #	Bad Debt	Status	Closed Date	OPID	Bill #	Received Amount	Refund Amount
☑	2382940		AUTHORIZED	01/15/2014	VTSSUPP	0002346570-2013-2013-0000-00	$123.16	$123.16
DURON PAINTS 3148 HILLSBOROUGH RD DURHAM NC 27705-3003								
☐	2277491		AUTHORIZED	01/10/2014	VTSSUPP	0002254335-2013-2013-0000-00	$169.74	$.42
NGUYEN, PATRICK MANH 314 FELDSPAR WAY DURHAM NC 27703-6664								
☐	1988175		AUTHORIZED	12/24/2013	VTSSUPP	0002276775-2013-2013-0000-00	$41.30	$41.30
KSOR, HLINH 910 MOREHEAD AVE DURHAM NC 27707-1369								

5. Click the Void Authorization button

Summary and Review

Your instructor will guide you through an interactive review session.

MODULE 4:

CONFIGURATION AND MAINTENANCE

FARRAGUT

Chapter 1: Users and Roles

The Users and Roles chapter presents the concepts of user configuration, NCVTS roles and assigned rights, and provides hands-on practice in user and role creation and maintenance.

Objectives

- Understand user configuration
- Understand available user roles and assigned rights
- Search for and edit an existing user record
- Create a new user
- Create a new role
- View a role and its assigned rights

User Configuration

There are several steps to setting up a user in NCVTS.

1 -NCID

2- Create User ID

3- Assign Role

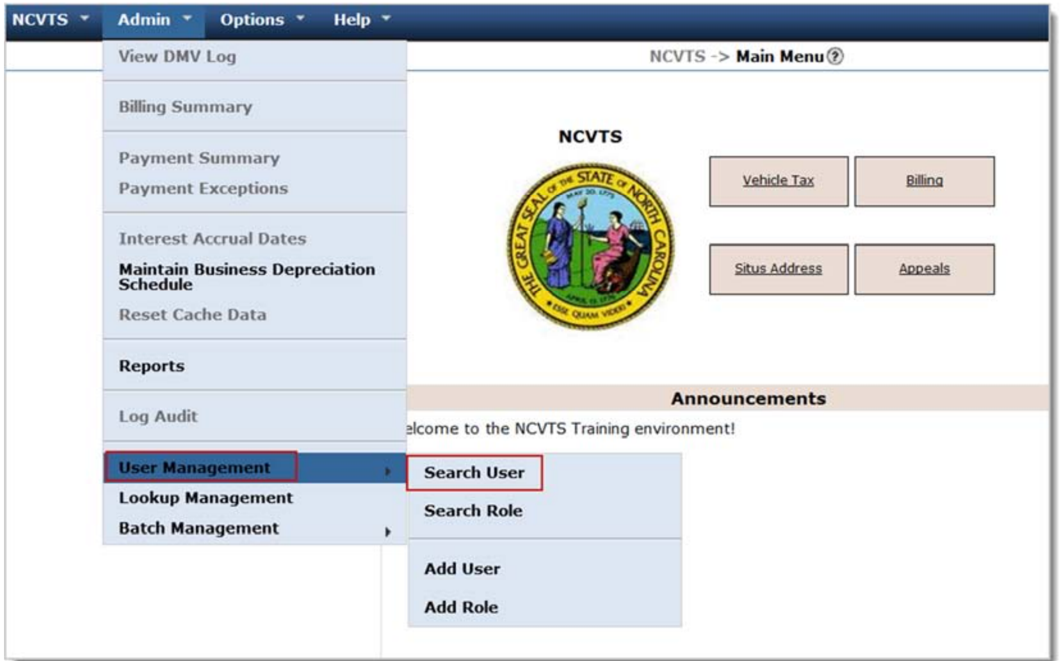
User Roles and Assigned Rights

There are six roles delivered with NCVTS. The role name and description are as follows:

Role	Role Description
County admin role	This role will be responsible for adding county users, maintaining County configuration, Tax Schedules, Maintenance of Situs Address, etc.
Vehicle tax admin role	This role will be responsible for maintenance of Mass Assignment, View Manager Queue, Approve Adjustments, viewing and editing RMV abstracts and processing of queues.
Vehicle record edit role	This role will be responsible for maintenance of RMV abstracts and processing of queues.
Proration edit role	This role will be responsible for prorating bills.
Refund edit role	This role will be responsible for authorizing and maintaining refunds in authorization queues.
Search and view role	This role will be responsible for performing searches and viewing abstracts and bills.
County transfer role	This role will be responsible for transferring vehicle abstracts to the appropriate county when the Situs address falls outside of the user's county.

Searching for and Editing an Existing User Record

1. From the **Admin** menu, select **User Management** then **Search User**

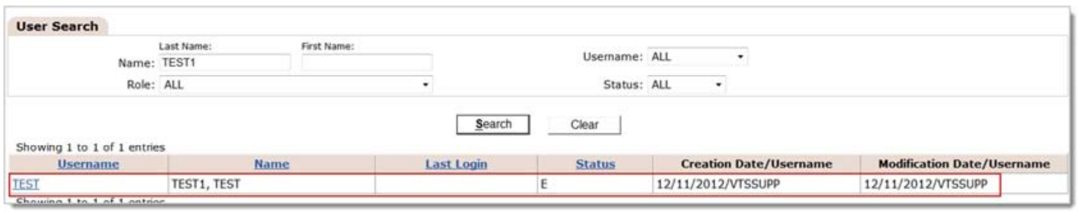


Searching for and Editing an Existing User Record (continued)

2. Enter the name of the user provided to you:

3. Click the **Search** button.

4. The User Search Results displays.



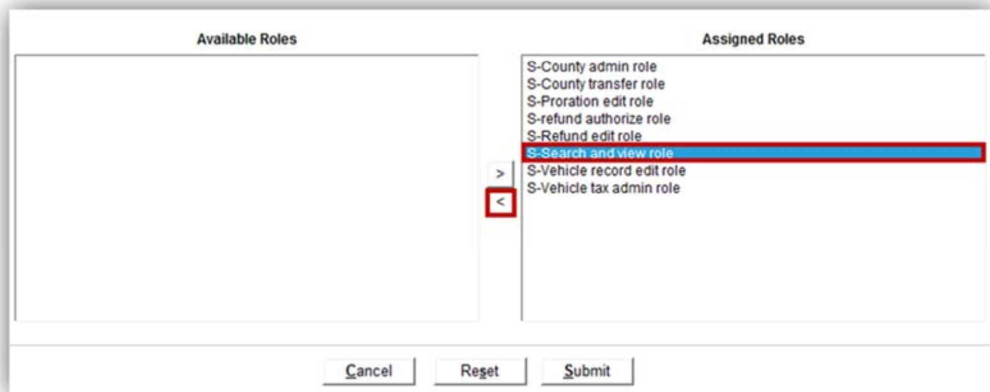
5. Click the **Username** link.

6. The Edit User page displays.

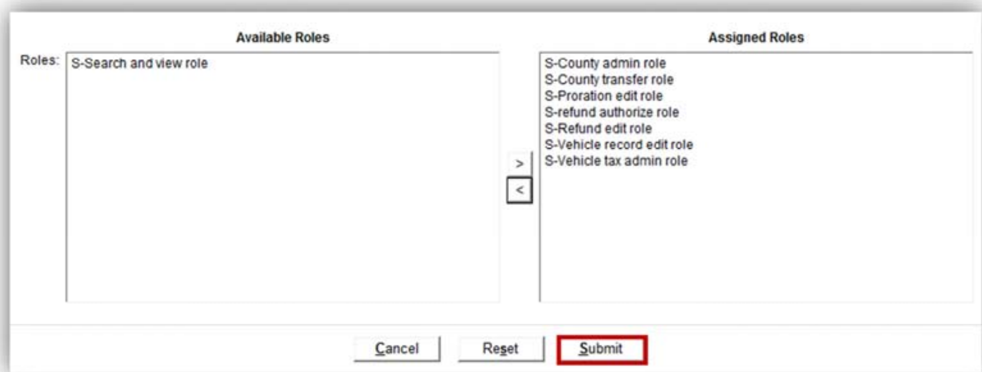
7. Click the **S-Refund edit role** Assigned Role.

Searching and Editing an Existing User Record (continued)

8. Click the left arrow to remove the role from the user's assigned role.



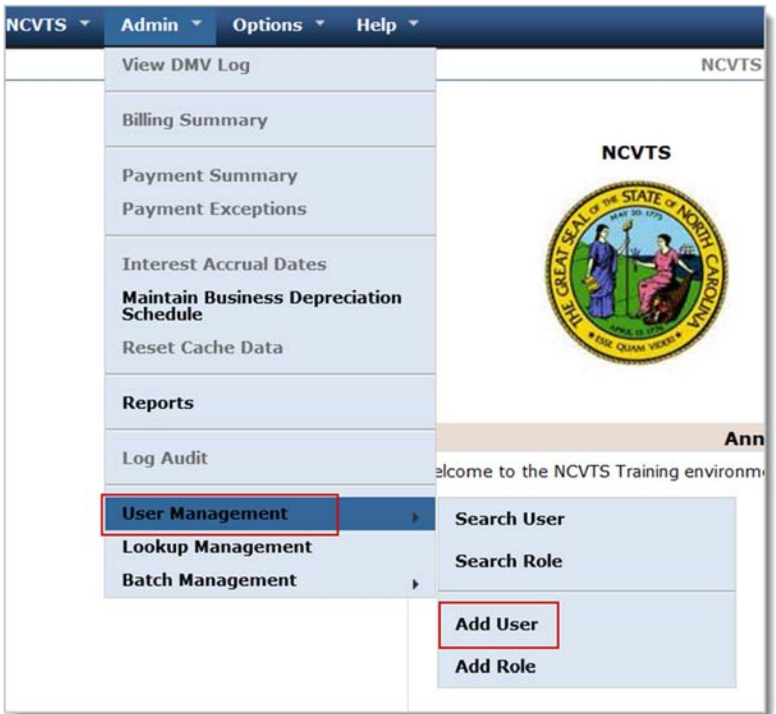
9. Click the **Submit** button.



10. The Search User page displays.

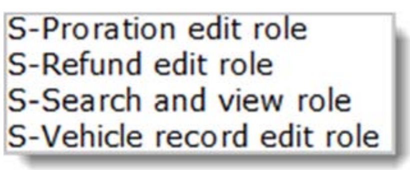
Creating a New User
INSTRUCTOR DEMO ONLY

1. From the **Admin** menu, select **User Management** then **Add User.**



The Add User page displays.

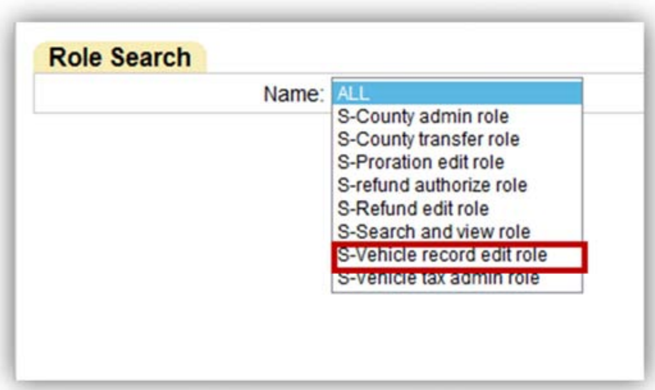
2. Enter your assigned NCID in the **Username** field.
3. Click the **Validate NCID** button.
4. Select the following roles:



5. Click the **Submit** button.

Searching for and Viewing an Existing Role

1. From the **Admin** menu, select **User Management** then **Search Role**.
2. Select **Vehicle record edit role** from the Name drop-down list.



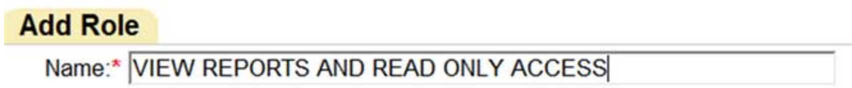
The search results display.

3. Click the **Vehicle record edit role** link.

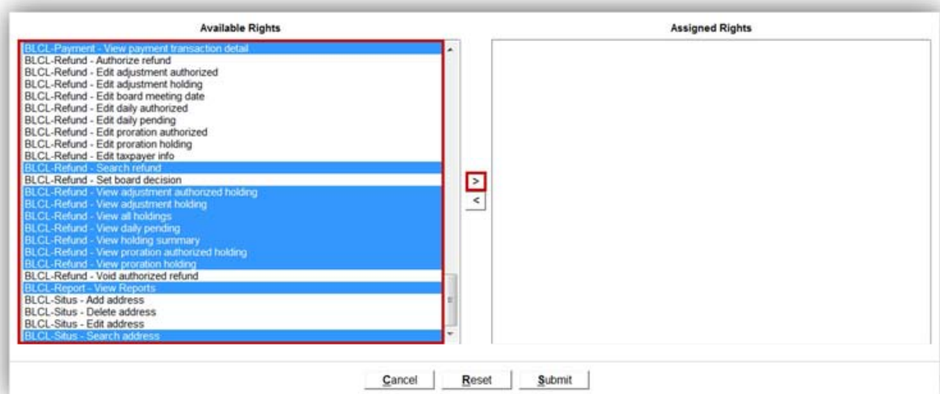
The Edit Role page displays.

Create a Role

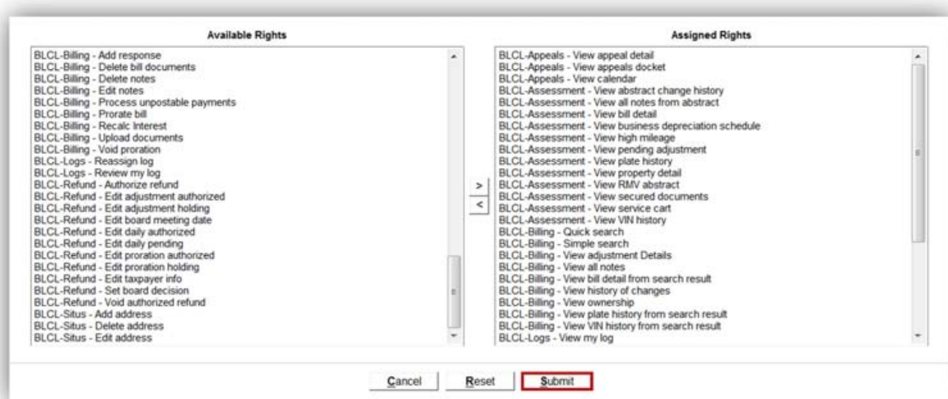
1. From the **Admin** menu, select **User Management** then **Add Role**.
2. Enter a role name in the Name field.



3. Select a set of available rights you would like to assign to the role and click the right arrow.



4. Click the **Submit** button.



Your role has been created.

FARRAGUT

Chapter 2: System Maintenance

The System Maintenance chapter provides demonstrations as well as hands-on practice in setting up and maintaining a number of administrative tables and functions in NCVTS.

Objectives

- Create an assignment rule for Mass Assignment
- Maintain tax rates
- Insert new tax Rates
- Maintain vehicle fees
- Copy a tax schedule
- Create Governing Board Meeting Dates for refunds
- View the high mileage schedule
- View the Depreciation Schedule

Creating an Assignment Rule for Mass Assignment INSTRUCTOR DEMONSTRATION ONLY

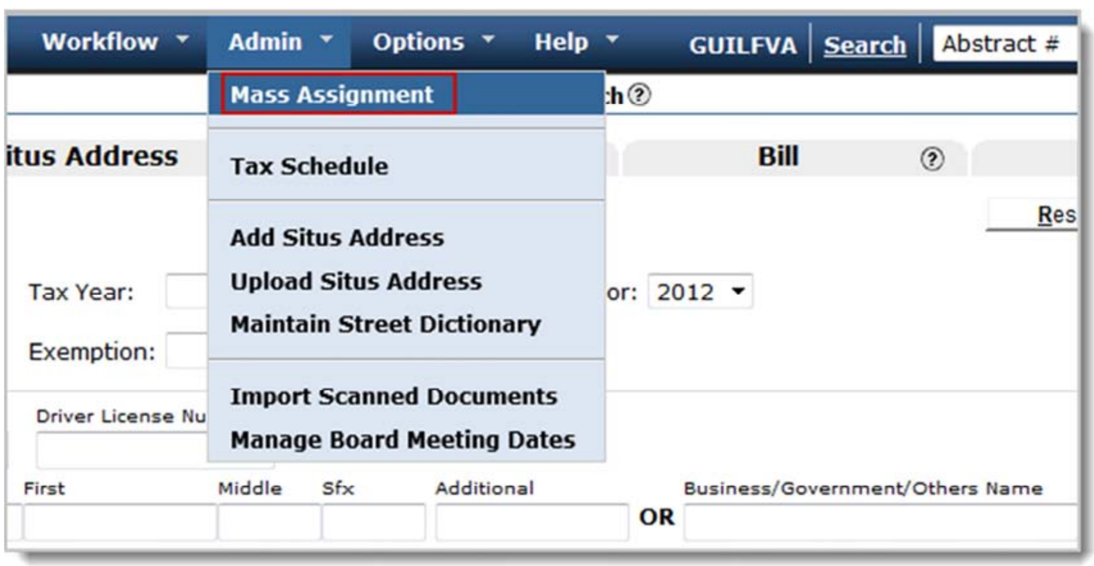
Mass Assignment Rules apply only during the DMV Upload process. New and changed Mass Assignment Rules do not change the user assignment of existing abstracts.

A Mass Assignment Rule is basically a way of automatically assigning abstracts in particular queues to one or more users. While you can assign and reassign abstracts in queues to users, creating one or more Mass Assignment Rules allows you to quickly assign abstracts during the DMV Upload process.

When you create a Mass Assignment Rule, you select which queue or queues the rule applies to, which users should be assigned abstracts in those queues, and the percentage of abstracts assigned to each user. For example, maybe you want one person in your County office to handle all abstracts in the RV and Trailer queues. You can set up a Mass Assignment Rule that says 100% of the abstracts in those queues are assigned to that person. For all other queues, you want the work split 50/50 (or 60/40 and so on) between two users. You would create a second Mass Assignment Rule for all of the remaining queues with the work split between those two people.

Steps

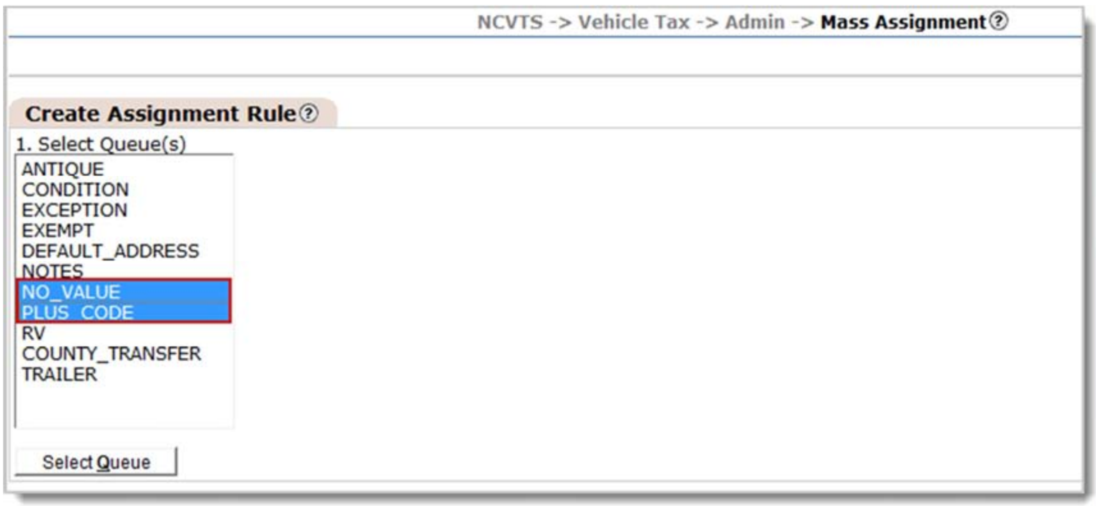
1. From the **Admin** menu, select the **Mass Assignment** option.



The Mass Assignment page displays.

Creating an Assignment Rule for Mass Assignment (continued)
INSTRUCTOR DEMONSTRATION ONLY

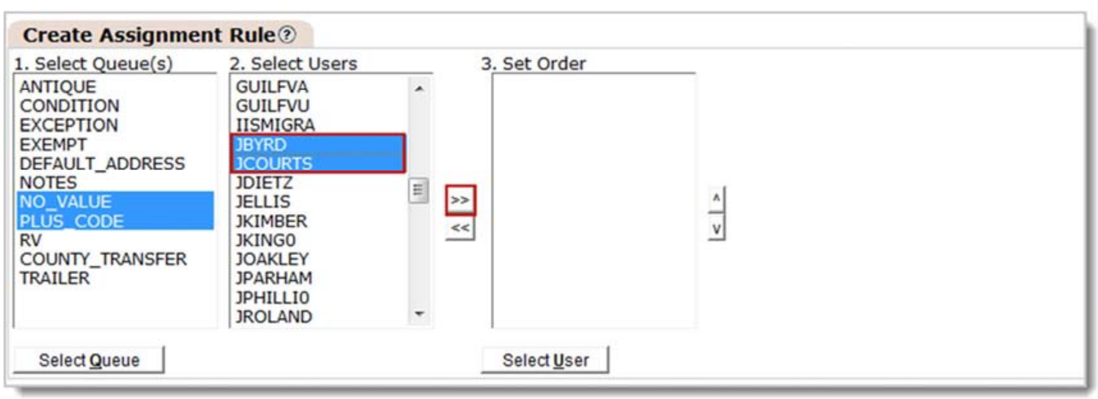
2. Under 1. Select Queues, click the name(s) of the queue(s) for which you want a mass assignment rule.



3. Click the **Select Queue** button.

   The queues are selected and steps to select users display.

4. Click the name(s) of the user(s) to be assigned abstracts during the DMV Upload, and then click the **>>** button to move the users to the Set Order step.



The users are added to the Set Order step.

If you want to select multiple queues or users, press and hold the Ctrl key and then click each item in the list.

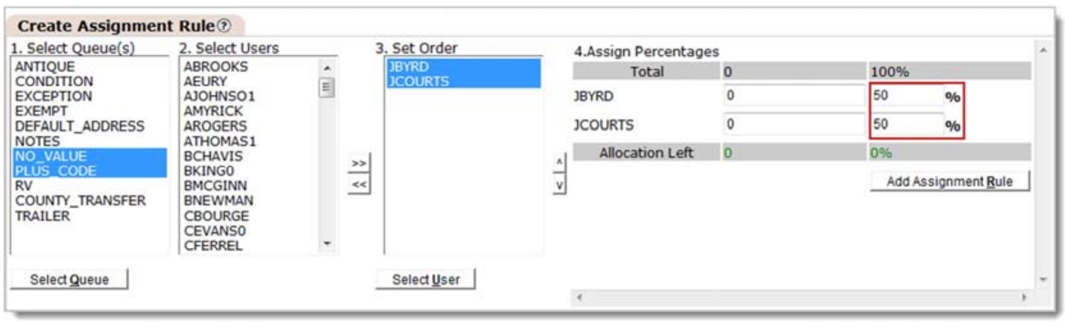
Creating an Assignment Rule for Mass Assignment (continued) INSTRUCTOR DEMONSTRATION ONLY

5. If desired, highlight a user and click the **^** or **v** button to change their position in the list of users.

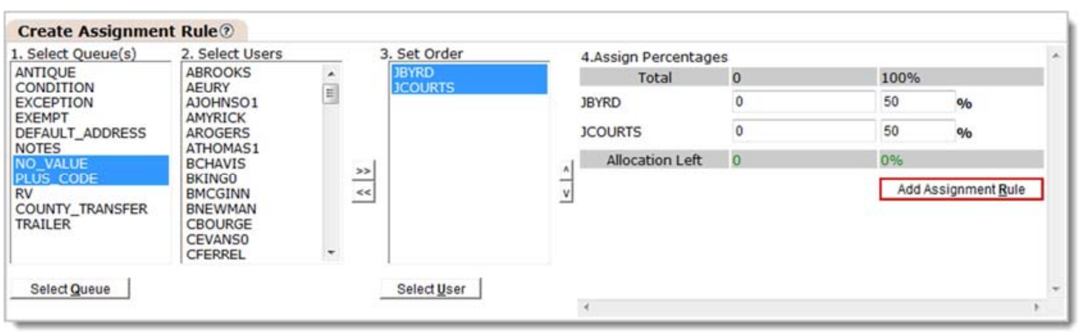
6. Click the Select User button to add the users to the Mass Assignment Rule.

   The users are selected and step 4 of the assignment rule process displays.

7. In the **%** fields, type the percent of the total number of abstracts that each user will be assigned following a DMV Upload.



8. Click the **Add Assignment Rule** button.



The new assignment rule is created and appears in the Assignment Rules list at the top of the page.

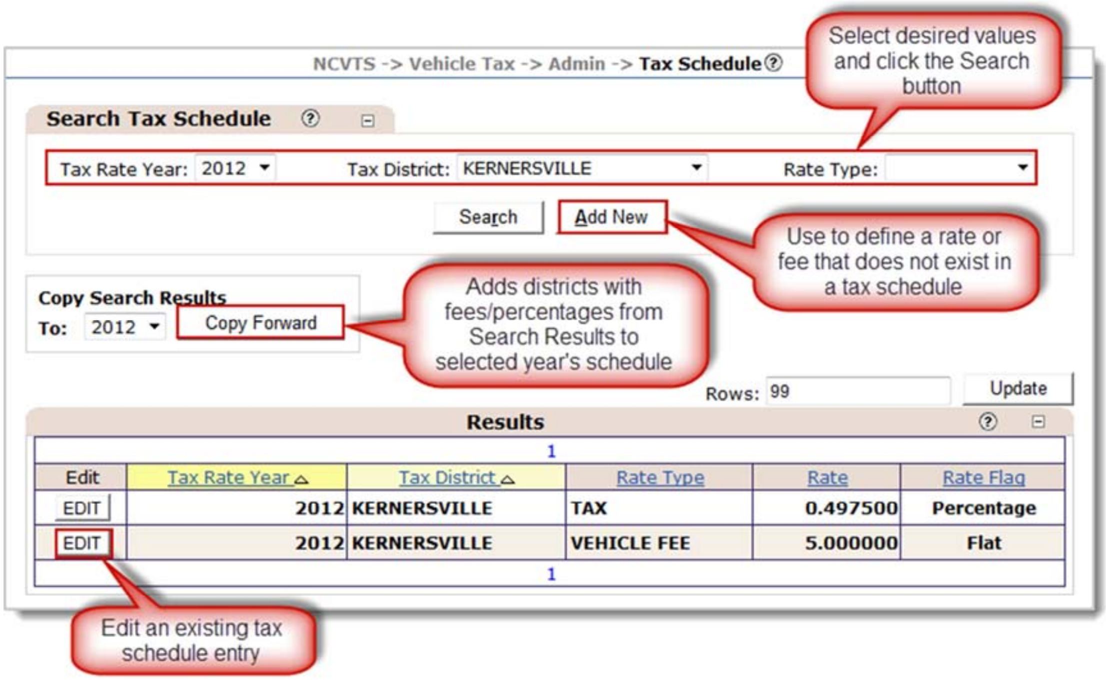
Tax Rates and Fees for a New Year

Each county's current and prior tax schedules already exist in NCVTS when you begin using the system. When your county's new fiscal year's tax schedule is determined, you will need to set up the new taxes and fees for each district on the Tax Schedule page in NCVTS.

Tax Schedule Page

The Tax Schedule page serves many purposes in setting up and maintaining schedules each year. From this page, you can:

- Search for tax schedule entries for a specific tax year
- Add new rates or fees for a district to a tax year
- Copy any or all of a prior tax schedule to create/add to the schedule for the new fiscal year
- Edit existing fees and tax percentages for a tax district



NCVTS has been updated to not allow counties to update or maintain tax rates after July 1. Please contact DOR if you need assistance.

Searching for Existing Tax Schedule Entries
INSTRUCTOR DEMONSTRATION ONLY

The Tax Schedule page includes search functionality that allows you to pull up any existing tax schedule entry for your county.

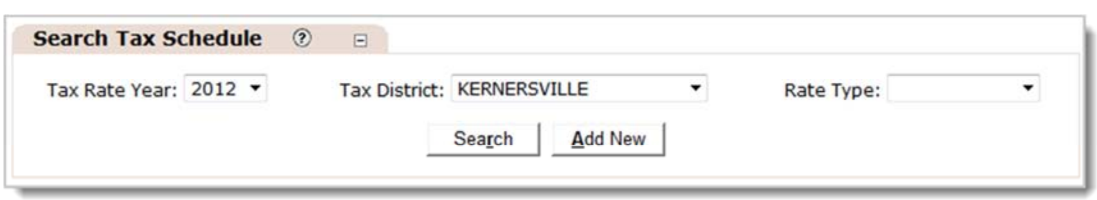
Search functionality is an important part of creating new tax schedules. If you desire to copy all or a portion of an existing tax schedule to create entries for another year, you first need to search for the information you want to copy. If you need to edit existing entries, you would also use the search functionality first to locate them.

Steps

1. From the **Admin** menu, select **Tax Schedule**.

The Tax Schedule page displays.

2. In the Search Tax Schedule section, select the desired Tax Rate Year, Tax District, and Rate Type.



You may leave the Tax District and/or Rate Type fields blank when performing a search. If you leave the Tax District field blank, you will pull information for all Tax Districts.

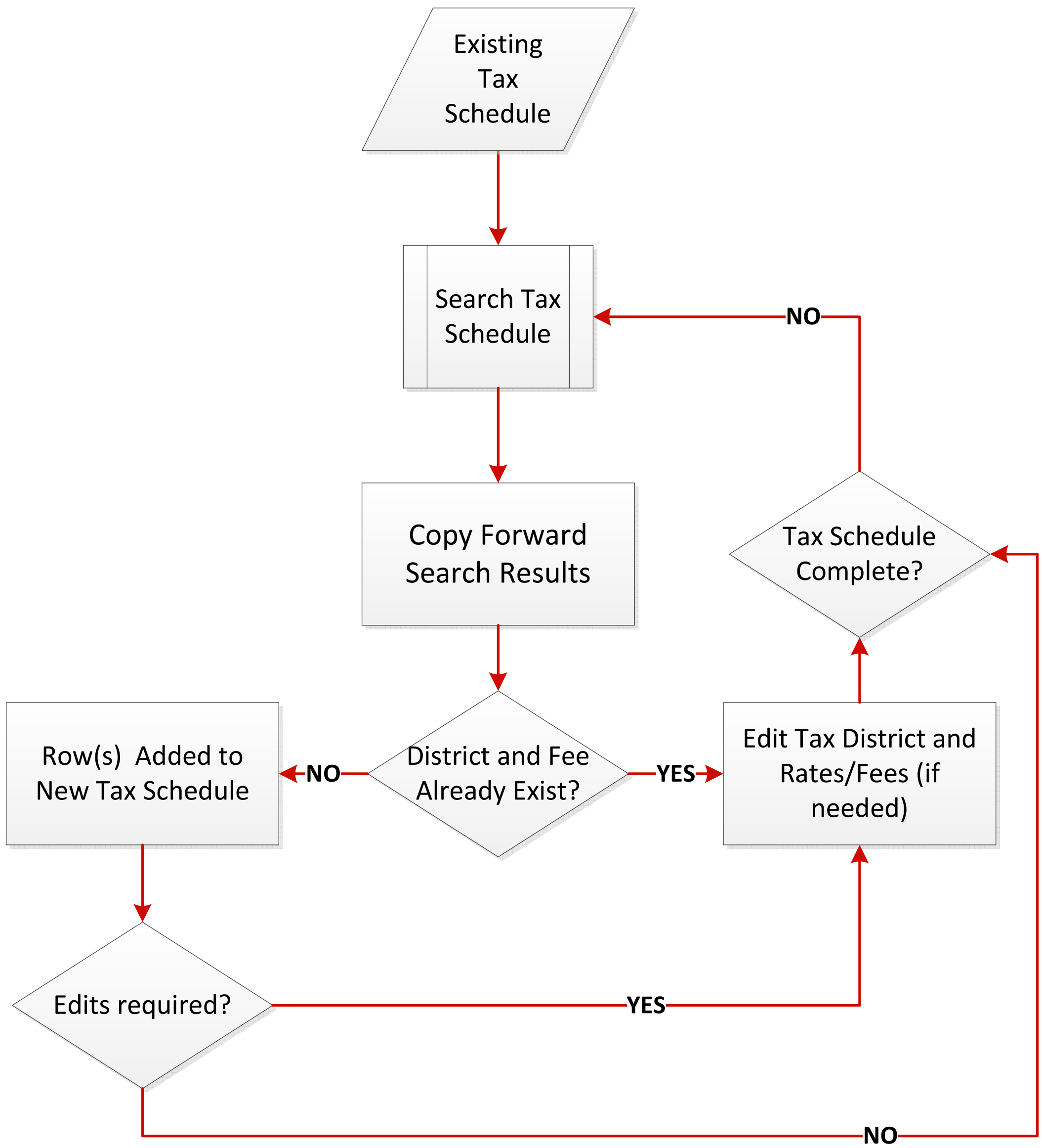
Searching for Existing Tax Schedule Entries (continued)
INSTRUCTOR DEMONSTRATION ONLY

3. Click the **Search** button.

   The entries matching your search appear in the Results section at the bottom of the page.

Copying Existing Tax Schedule Entries to Create New Entries INSTUCTOR DEMO ONLY

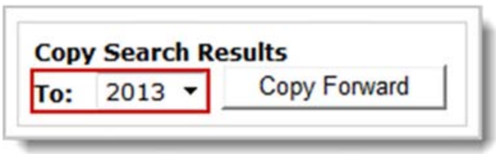
The Copy Forward button on the Tax Schedule page allows you to create a copy of the current search results from a tax schedule and add them to another schedule. If the entry already exists in a tax year, you cannot add it again. In that case, you would search for and edit the record.



Copying Existing Tax Schedule Entries to Create New Entries (continued)
INSTRUCTOR DEMO ONLY

Steps

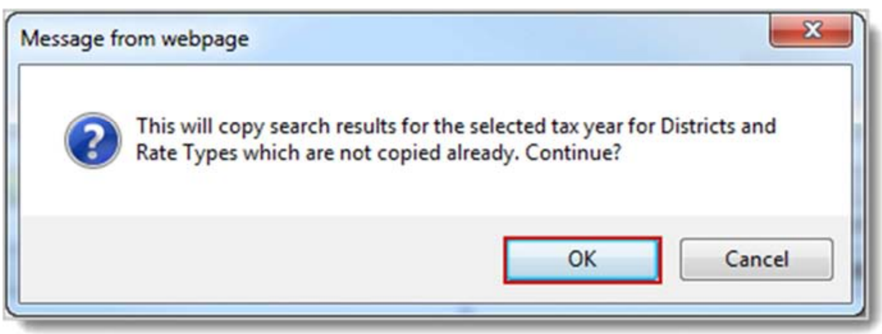
1. From the Tax Schedule page with search results displayed, select the desired year in the **To** field.



2. Click the **Copy Forward** button.

   An information pop-up window displays.

3. Click the **OK** button.



The entries are created in the selected year’s tax schedule.

If your search results contain entries that already exist in the tax year you are copying to, a message displays in red at the top of the page indicating the number of search results that were copied.

Editing Existing Tax Schedule Entries
INSTRUCTOR DEMONSTRATION ONLY

Once a tax schedule entry is copied into a tax schedule, you can edit the information as needed. To edit an existing tax schedule entry, you search for the existing entry and the use the Edit button to modify the information.

Be sure that you do not accidentally edit a tax schedule entry that is currently in use.

Steps

1. From the Tax Schedule page, search for the tax entry or entries you need to edit.

   The tax schedule entries matching your search display.

2. Click the **Edit** button for the entry you need to edit.

Results

1

Edit	Tax Rate Year	Tax District	Rate Type	Rate	Rate Flag
EDIT	2013	KERNERSVILLE	TAX	0.497500	Percentage
EDIT	2013	KERNERSVILLE	VEHICLE FEE	5.000000	Flat

1

   The current tax values display in the Maintain Tax Schedule section.

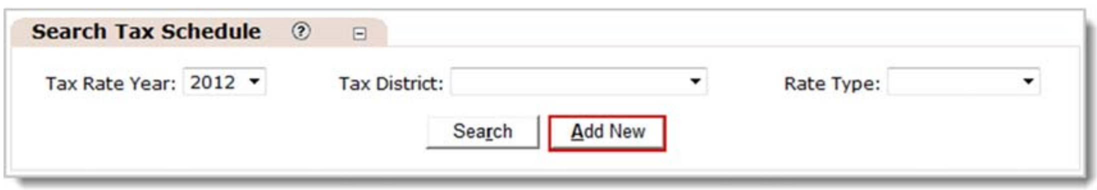
3. Edit the values as desired, and then click the **Submit** button.

Adding New Tax Schedule Entries
INSTRUCTOR DEMONSTRATION ONLY

The other option of adding a new entry to a tax schedule is manually through the Add New button. When you click this button, you are presented with fields that allow you to select the Tax Rate Year, Tax District, Rate Type, Rate Flag (Percentage for taxes or flat for fees), and Rate. When you click the Submit button, the new entry is added to the Tax Schedule for the year you specified.

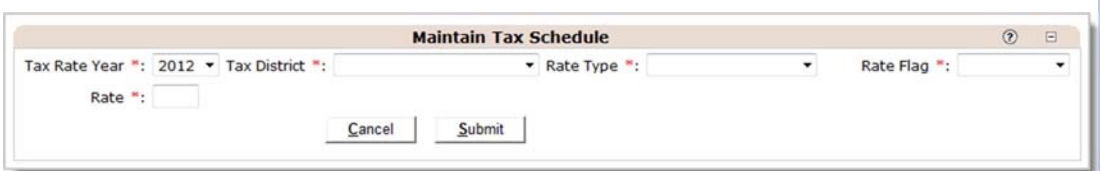
Exercise Steps

1. From the Tax Schedule page, click the **Add New** button in the Search Tax Schedule section.



The Maintain Tax Schedule section displays fields to create a new entry.

2. Select the **Tax Rate Year**, **Tax District**, **Rate Type**, **Rate Flag**, and **Rate**.



3. Click the **Submit** button.

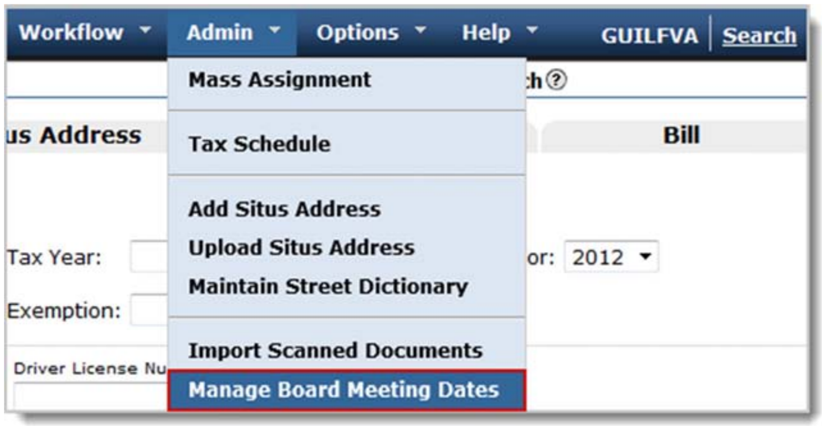
The new entry is added to the selected year’s tax schedule.

Creating Governing Board Meeting Dates for Refunds

When issuing refunds, all refunds due to adjustments must be associated with a date the governing board met to decide whether the refund will be approved. Board meeting dates must be added manually in NCVTS before they can be associated to a refund.

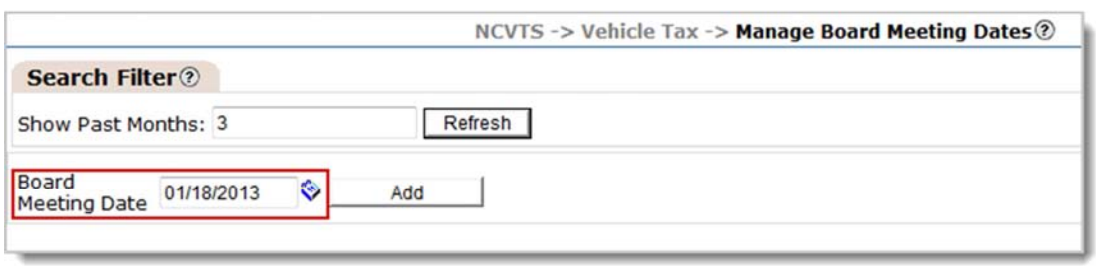
Exercise Steps

1. From the **Admin** menu, select **Manage Board Meeting Dates**.



The Manage Board Meeting Dates page displays.

2. Click the calendar icon by the **Board Meeting Date** field to select a date, or type a date in the field.



3. Click the **Add** button.

The board meeting date is added and is available for selection on pending refunds.

Viewing the High Mileage Schedule
INSTRUCTOR DEMONSTRATION ONLY

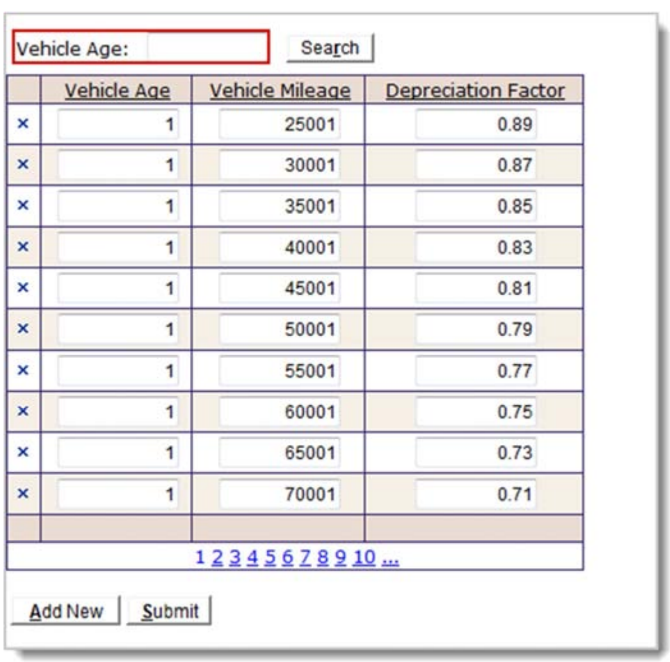
When a user enters a mileage value on an abstract and clicks the Calc HM button, NCVTS looks to the age of the vehicle and depreciates the value based on the entered mileage. This table of information is stored in NCVTS in the High Mileage Schedule and is editable, if needed.

Exercise Steps

1. From the **Options** menu, select **High Mileage Schedule**.

The High Mileage Schedule displays.

2. Type a number in the **Vehicle Age** field.



	Vehicle Age	Vehicle Mileage	Depreciation Factor
×	1	25001	0.89
×	1	30001	0.87
×	1	35001	0.85
×	1	40001	0.83
×	1	45001	0.81
×	1	50001	0.79
×	1	55001	0.77
×	1	60001	0.75
×	1	65001	0.73
×	1	70001	0.71

Viewing the High Mileage Schedule (continued)
INSTRUCTOR DEMONSTRATION ONLY

3. Click the **Search** button.

The vehicle mileage and depreciation factor for the selected vehicle age display.

4. Click a number at the bottom of the search results to move to the additional pages.

Vehicle Age: 5 Search

	Vehicle Age	Vehicle Mileage	Depreciation Factor
×	5	85001	0.89
×	5	90001	0.87
×	5	95001	0.85
×	5	100001	0.83
×	5	105001	0.81
×	5	110001	0.79
×	5	115001	0.77
×	5	120001	0.75
×	5	125001	0.73
×	5	130001	0.71

1 2 3

Viewing a Depreciation Schedule
INSTRUCTOR DEMONSTRATION ONLY

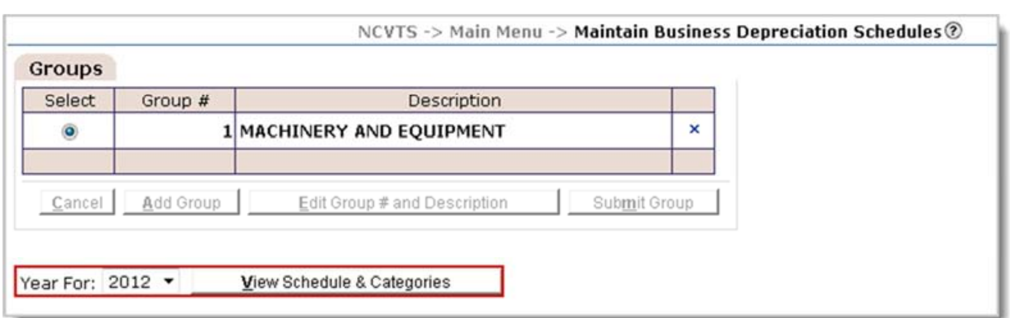
Depreciation Schedules are now standardized in NCVTS. With appropriate permissions, you can view a Depreciation Schedule, but only users with State-level authority can edit them.

Exercise Steps

1. From the **NCVTS** menu, select **NCVTS Main Menu**.

2. From the Admin menu, select Maintain Business Depreciation Schedule.

3. Select the desired **Year For**, and then click the **View Schedule and Categories** button.



Viewing a Depreciation Schedule (continued)
INSTRUCTOR DEMONSTRATION ONLY

4. Select the radio button for the schedule you want to view, and then click **Edit** Schedule.

Schedules in Group

Select	Schedule	Life Years	
○	A	10	×
◉	B	8	×
○	J	8	×
○	MV	8	×
○	N	8	×
○	R	12	×
○	RR	8	×
○	S	8	×
○	S	7	×
○	SL	8	×
○	T	12	×
○	TL	8	×
○	TR	8	×
○	V	3	×

Add New Schedule | Edit Schedule

5. View the schedule, and click the **Cancel** button when finished.

Year Acquired	% Good
2011	87.00
2010	76.00
2009	64.00
2008	53.00
2007	40.00
2006	28.00
2005	25.00
PRIOR	25.00

Cancel | Submit Schedule

MODULE 5:
NCVTS REPORTS

Chapter 1:

The NCVTS Reports Overview Chapter describes how to access and run NCVTS reports. The chapter also provides information on standard NCVTS report parameters as well as viewing, exporting and printing reports.

Objectives

- Understand how to access NCVTS reports
- Understand standard NCVTS report parameters
- Understand how to run a report
- Understand how to navigate within the NCVTS reports viewer window
- Understand how to export a report
- Understand how to print a report

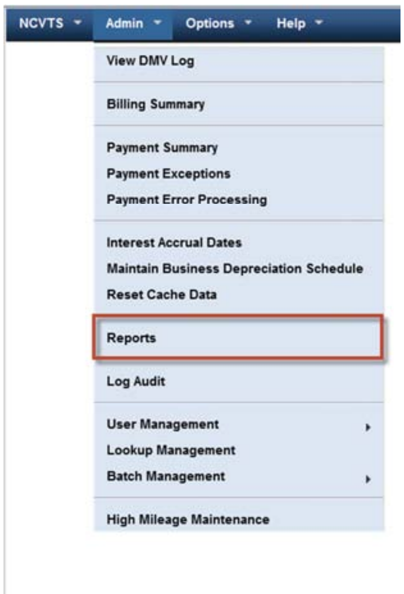
Overview of NCVTS Reports

NCVTS Reports provide key metrics and details based on registered motor vehicle data for North Carolina counties. Users can set unique parameters for each report to determine the range of data that will populate a particular report. Reports may be viewed directly through the NCVTS reports viewer or exported into another file format such as an excel spreadsheet, CSV file, or PDF.

Accessing NCVTS Reports

Exercise Steps

1. Select Reports from the Admin dropdown menu



2. Select your report of choice from the Reports dropdown menu and click the **Go** button

3. Report parameters for the report you selected will display

Standard NCVTS Report Parameters

The following report parameters are available on the majority of NCVTS reports.

Standard Parameters

Parameter	Description
Renewal Date Fiscal Year	Fiscal year in which vehicle tag was renewed and/or paid
Renewal Date Period	Monthly, quarterly or annual renewal period in which a vehicle tag was renewed
Start Transaction Date	Earliest date within a date range for which the most recent transaction (payment, reversal or refund) updated a bill
End Transaction Date	Latest date within a date range for which the most recent transaction (payment, reversal or refund) updated a bill
Abstract Year For	Effective tax rate year for abstract
Tax Districts/Jurisdictions	County tax districts/jurisdictions
Abstract Status	Status of abstract Abstract status include: ► Adj Pending ► Billed ► Not Billable ► Not RFB ► Received ► RFB ► Voided
Bill Paid Status	► Paid – Paid in Full ► Unpaid – Balance on Bill

Run an NCVTS Report

Each NCVTS Report has unique parameters which must be set before a report is run. Users are required to select an option for each parameter that is available.

Exercise Steps

1. Click the dropdown arrow next to each given parameter of your report and select the most appropriate option(s)

2. Click the **View Report** button

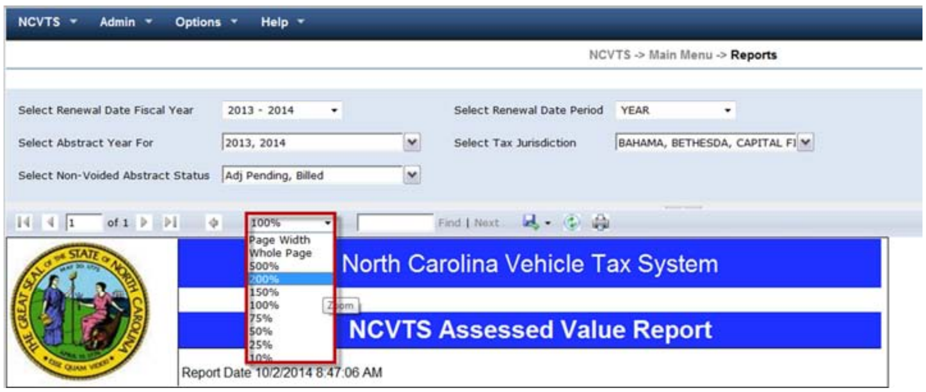
3. Your report will display based on the report parameters you set

Navigating NCVTS Reports

After a user runs a report, the report details will display in the reports viewer window. Users can review report details, change report view settings, sort and filter reports, export reports and print reports from the Reports Viewer window.

Exercise Steps

1. Change the report view settings by selecting your zoom percentage from the report zoom dropdown



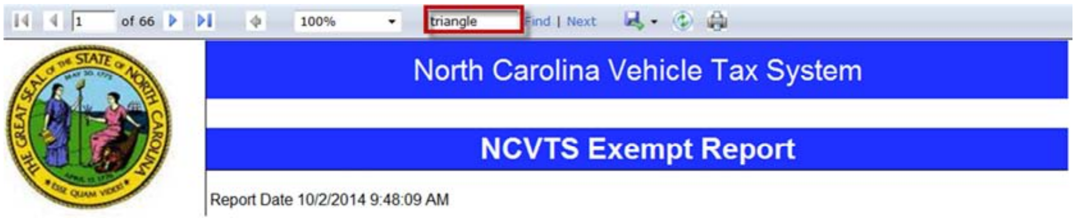
2. Navigate to a different page on your report (if applicable) by clicking the navigation arrows in the report viewer pane

3. Click the refresh icon to reset the information contained in your report. This will take you back to the first page of the report.

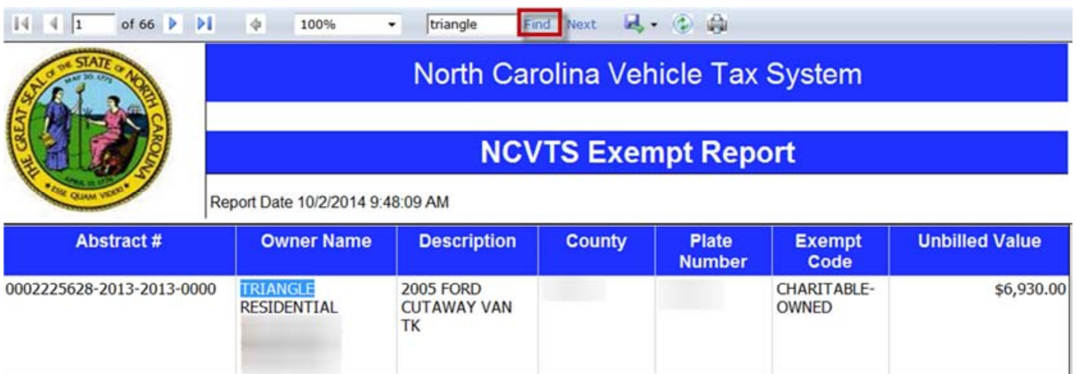
If you change the report parameters and click the refresh button, the report will still display information for the original parameters that were set.

If you would like to re-run your report with different parameters, edit the parameters at the top of the repot screen and click the **View Report** button.

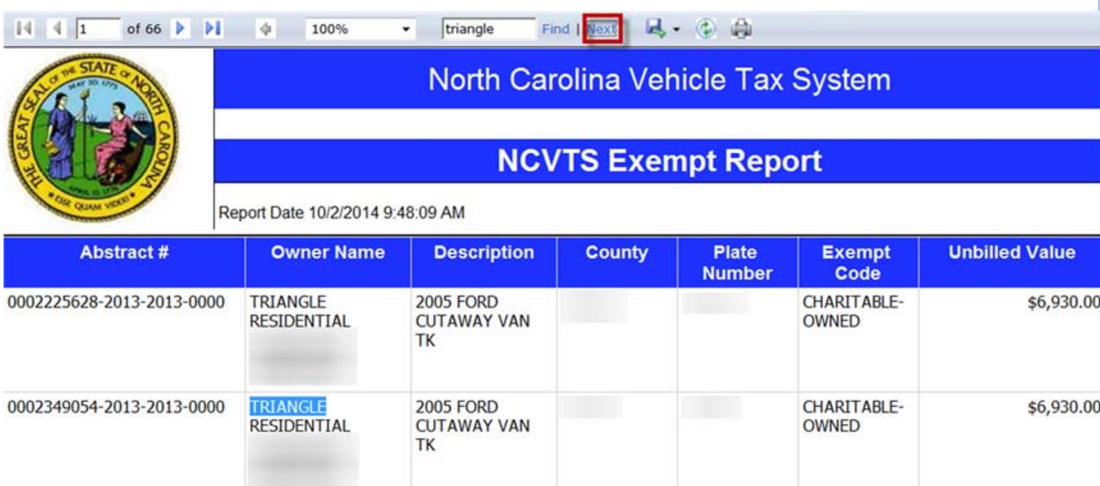
4. Search by keyword within a report by entering your search criteria in the search bar on the report viewer pane



5. Click the Find hyperlink



6. If applicable, click the **Next** hyperlink to view additional keyword matches



Exporting NCVTS Reports

The CSV format is recommended if you would like to manipulate data for a report you are exporting.

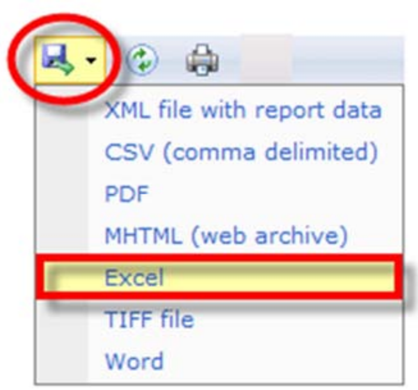
PDF and Excel formats will retain the original information and formatting that displays on an NCVTS report when exported.

NCVTS reports can be exported into the following file formats:

- CSV (comma delimited)
- Microsoft Excel
- PDF
- XML
- Microsoft Word
- MHTML (web archive)
- TIFF

Exercise Steps

1. Run report with desired parameters
2. Click the floppy disk icon and select the format of your choice



3. Follow prompts to open or save report in new format

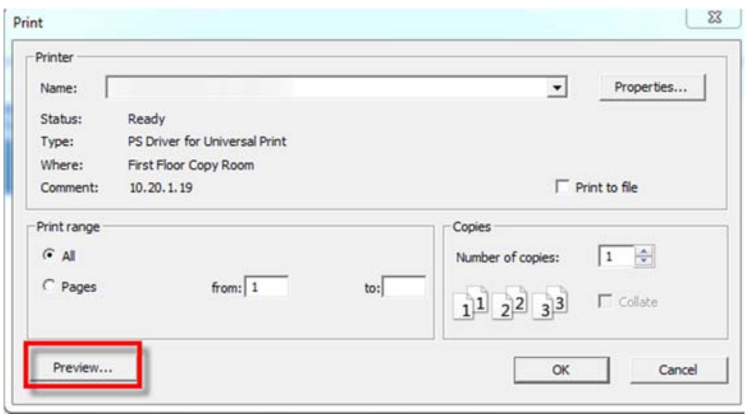
Printing NCVTS Reports

NCVTS users can print report details directly from the NCVTS Reports Viewer window

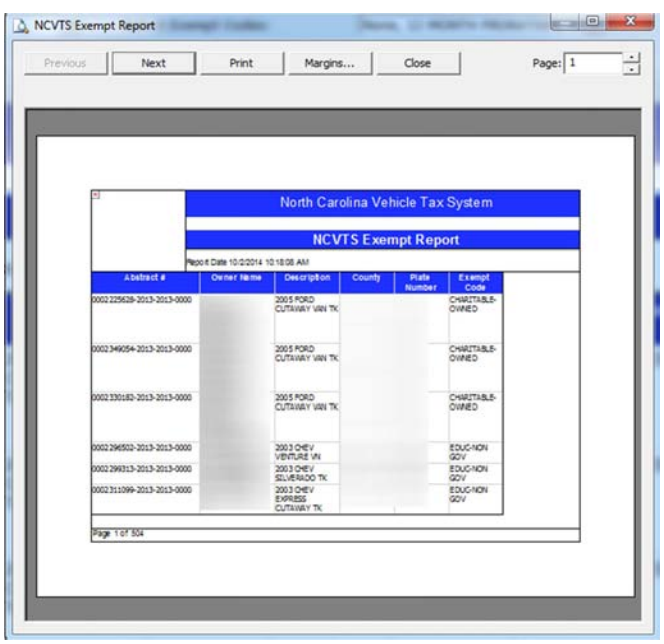
Exercise Steps

1. Run your report with desired parameters
2. Click the printer icon

3. Click the Preview button on the print dialog screen to preview your report



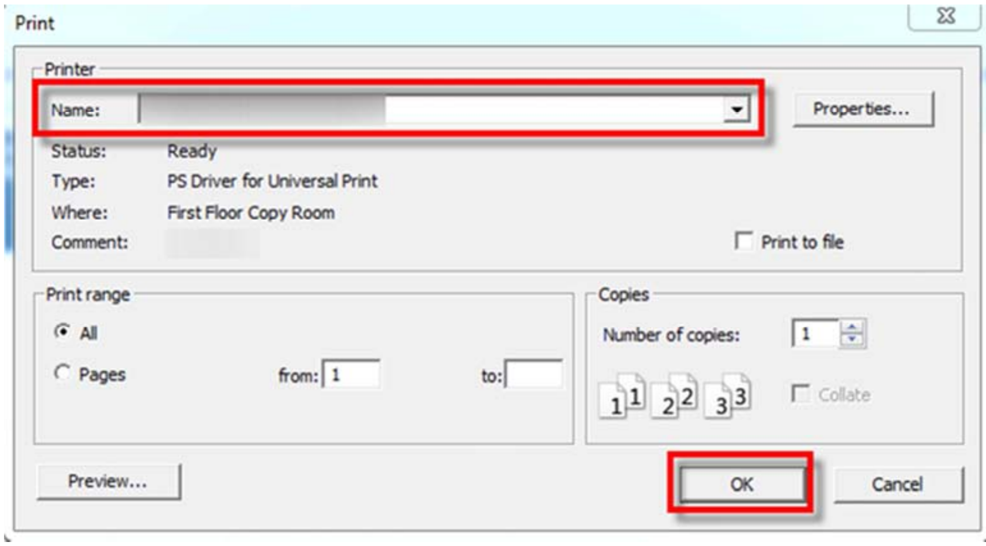
4. Preview report and when finished, click the **Close** button



You can print a range of pages for your report if the entire report does not need to printed

If you are printing a particular page range it is recommended that you preview your report first before printing. The page range on the print preview screen may differ from the page range that displays on the Reports Viewer window.

5. Select the appropriate printer from the **Name: drop down menu** and click the **OK** button



6. Your report will begin printing on the printer you selected

Chapter 2: NCVTS Standard Reports

The NCVTS Standard Reports Chapter describes the purpose of various NCVTS reports and provides information regarding non-standard report parameters and available report fields.

Objectives

- Understand the purpose of Standard NCVTS reports
- Understand non-standard report parameters that are available for applicable Standard NCVTS reports
- Understand the information contained in report fields for each Standard NCVTS report

Table of Contents

NCVTS Appeal Loss Report

Purpose

This report provides a high-level summary of the original appraised value of registered motor vehicles involved in an appeal case and the final value of the vehicle after an appeal decision has been made.

Non- Standard Report Parameters

Non-Standard Report Parameter	Description
Fiscal Year for Appeal Open Date	Fiscal year the vehicle appeal was created in NCVTS
Period for Appeal Open Date	Monthly, quarterly or annual time period the vehicle appeal was created in NCVTS
Appeal Status	Current status of appeal in NCVTS
Filing Status	Used to indicate if appeal was filed in a timely or untimely fashion
Appeal Level	Current level of the appeal in NCVTS

Report Fields

Field	Description
Year For	Effective tax rate year for abstract
Tax District	Tax jurisdiction
Case Number	Appeal case number associated with appeal in NCVTS
Appeal Level	Level of Appeal ► MVVRB
Appeal Status	Status of the appeal ► 1 Open – Received ► 2 Open – Assigned

Field	Description
	▶ 3 Open – In Progress ▶ 4 Open – Ready for Decision ▶ 5 Open – Pending Value Change ▶ 6 Open – Ready for Close ▶ Closed ▶ Void ▶ Withdrawn
Appraiser	Appraiser who has been assigned to the appeal case
Appeal ID	Unique Appeal ID number associated with appeal in NCVTS
Decision	Appeal Decision ▶ Approved ▶ Denied ▶ Inquiry Only ▶ Partially Approved ▶ Pending ▶ Reschedule ▶ Resolved – Consent ▶ Untimely
Filing Status	Type of Filing Status
Prior Year Appraised	Appraised value of vehicle one year prior
Appraised Before	Appraised value before appeal decision is made
Appraised After	Appraised value after appeal decision is made
Appraised Net Loss	Difference between appraised before and appraised after values. Losses will display as a negative number.
Current Appraised	Appraised value of vehicle currently listed on the abstract

Assessed Value Report

Purpose

The Assessed Value Report displays assessed values for each tax district where the assessed value is the total appraised value minus the total exempt value in each tax district by renewal period. This report is used to estimate the number of vehicles and value in each tax district.

Report Fields

Field	Description
Year For	Effective tax rate year for abstract
Tax Jurisdiction	Tax jurisdiction name
Renewal Type	Indicates new issuance or renewal
# of Vehicles	Number of vehicles based on renewal type for a jurisdiction
Appraised Value (Before Exempt)	Appraised value of vehicles based on renewal type for a jurisdiction
Exempt Value	Summary of exempt value of vehicles based on renewal type for a jurisdiction
Assessed Value (Total Taxable Value)	Assessed value of vehicles based on renewal type for a jurisdiction

The Assessed Value Report can be run by either renewal period or by transaction date.

The Assessed Value Report is populated after a nightly process is run to reduce system performance issues due to the volume of data that must be updated each time the report is run.

NCVTS County Net Collections Report

Purpose (Renewal Month)

The NCVTS County Net Collections Report Summarizes the following:

- Taxes collected
- Tax bill data by fiscal year
- Tax district
- Levy type

Purpose (Transaction Date)

The NCVTS County Net Collections Report allows counties to track net collections for vehicle bills based on payment date.

Report Fields

Field	Description
Year For	Effective tax rate year for abstract
Billed Amount	Net Levy
Vehicle Adjustments	Value of adjustments to vehicle value or change of Situs on an abstract
Vehicle Releases	Value of bill releases including prorations
Collection Amount	Amount collected during date range specified within report parameters
Unpaid Balance	Outstanding balance due as indicated during date range specified within report parameters
% Uncoll.	Sum of Unpaid Balance divided by the Sum of Billed Amount
# of Bills Paid	Number of bills paid during date range

Field	Description
	specified within report parameters
Coll. Proration Percent	Collection amount divided by the total collection amount

NCVTS Default Bill Situs Report

Purpose (Renewal Month)

The NCVTS Default Situs Report identifies abstracts billed with default addresses based on renewal dates.

Purpose (Transaction Date)

The NCVTS Default Situs Report identifies abstracts billed with default addresses based on transaction dates.

Report Fields

Field	Description
Bill Status	Describes whether bill is paid or unpaid
Renewal Type	Describes the type of renewal ► New Issuance ► Renewal ► LRP
Bill Amount	Original bill amount due
Last Payment Date	Last date a payment was made against a bill with a default situs address
Abstract Number	Abstract number
Situs Address	Default situs address shown on bill
VIN	Vehicle Identification Number for vehicle billed with default situs address
Plate Number	Plate number for vehicle billed with default situs address
Mailing Address	Vehicle owner mailing address

Exclusion Report

Purpose

The Exclusion Report lists all vehicles that are excluded from taxation in NCVTS based on plate category

Non- Standard Report Parameters

Non-Standard Report Parameter	Description
Plate Issue Date Fiscal Year	Fiscal year the vehicle plate was issued
Plate Issue Date Time Period	Monthly, quarterly or annual time period the vehicle plate was issued
Exclusion Codes	Reason for exclusion – either a use code or plate category e.g. (TLM, SHP, FAR3, UDR)

Report Fields

Field	Description
Abstract #	Abstract number for vehicle with exclusion
Owner Name	Owner name for vehicle with exclusion
Situs Address	Situs address for vehicle with exclusion
Mailing Address	Owner mailing address for vehicle with exclusion
Description	Description of vehicle with exclusion
Sales Price	Sales price for vehicle with exclusion
Prior Year Value	Prior year value for vehicle with exclusion
County	County the vehicle with exclusion is

Field	Description
	located within
VIN	Vehicle identification number for vehicle with exclusion
Plate Number Category	Plate number and category for vehicle with exclusion
Unbilled Value	Exempt value or Assessed Value – Appraised value

Exempt Report

Purpose

The Exempt Report lists all vehicles that are exempt from taxation. Exemptions may be either full or partial exemptions.

Non- Standard Report Parameters

Non-Standard Report Parameter	Description
Exempt Codes	Reason for exemption e.g. (Religious-Owned, Military, Property Exempt)

Report Fields

Field	Description
Abstract #	Abstract number for vehicle with exemption
Owner Name	Owner name for vehicle with exemption
Description	Description of vehicle with exemption
County	County the vehicle with exemption is located within
Plate Number	Plate number and category for vehicle with exemption
Exempt Code	Reason for exemption e.g. (Religious-Owned, Military, Property Exempt)
Unbilled Value	Exempt value or Assessed Value – Appraised value

Gap Billing Report

The Gap Billing report uses the most recent voided abstract available prior to the new vehicle bill to calculate the gap, with the exception of the Situs address and Mailing address fields.

For example, the plate expires in June 2014 and when the registration is renewed in October 2014 the expiration has been changed to expire October 2015. This creates a 4 month gap where the vehicle is unregistered. These missing months will show on this report.

Purpose

The Gap Billing Report lists all vehicles that have had a new plate issued or have had a new sticker that changes the renewal cycle where one or more months of taxes have been omitted.

Non-Standard Report Parameters

Non-Standard Report Parameter	Description
Which Gap Billing Case	Determines if report will pull data for renewals or new issuances
Renewal Parameters	
Renewal Fiscal Year	Current fiscal year renewed
Renewal Time Period	Monthly, quarterly or annual time period plate was renewed
New Issuance Parameters	
Issuance Date Fiscal Year	Current fiscal year issued
Issuance Date Time Period	Monthly, quarterly or annual time period the vehicle plate was issued

Report Fields

Field	Description
Abstract Number	Abstract number for vehicle that was “skipped”
VIN	Vehicle identification number for vehicle that was “skipped”
Vehicle Description	Description of vehicle that was “skipped”
Plate #	Plate number of vehicle that was

Field	Description
	“skipped”
Plate Valid Thru	Plate expiration date for vehicle that was “skipped”
Owner Name	Owner name of vehicle that was “skipped”
Situs Address Fields	Includes situs information for the street address, city, state and zip code based on the current abstract
Mailing Address Fields	Includes owner mailing address information for the street address, city state and zip code based on the current abstract
Vehicle Value	The value of the motor vehicle is determined from the prior year’s abstract
Billed Amount	The original billed amount listed on older abstract which caused the gap

Not Renewed Vehicle Report

Purpose

The Not Renewed Vehicle Report lists all vehicles whose registration has not been renewed, but the skipped renewal is more than one year.

Report Fields

Field	Description
Abstract Number	Abstract number for vehicle that was “skipped”
VIN	Vehicle identification number for vehicle that was “skipped”
Plate #	Plate number of vehicle that was “skipped”
Owner Name	Owner name of vehicle that was “skipped”
Situs Address Fields	Includes situs information for the street address, city, state and zip code
Mailing Address Fields	Includes owner mailing address information for the street address, city state and zip code
Vehicle Description	Description of vehicle that was “skipped”
Plate Valid Thru	Plate expiration date for vehicle that was “skipped”
Vehicle Value	The value of the motor vehicle is determined from the prior year’s abstract
Amount Due	Bill due amount for the bill listed (may include adjustments)

Tax Billing Detail Report

Purpose

The Tax Billing Detail Report provides information for specific county bills that match report parameters.

Report Fields

Field	**Description**
VIN Num	Vehicle identification number for bill listed on report
Vehicle Information	Vehicle description for bill listed on report
Bill Number	NCVTS bill number for bill listed on report
Bill Due Date	Bill due date for bill listed on report
Taxpayer Name	Vehicle owner for bill listed on report
Taxpayer Address	Vehicle owner mailing address for bill listed on report
Jurisdiction	Applicable tax jurisdiction(s) for bill listed on report
Levy Type	Applicable bill levy types listed on report ► Tax ► Vehicle Fee
Taxes	Amount of Tax or Vehicle fee for bill listed on report

Tax Billing Summary Report

Purpose

The Tax Billing Summary Report may be used to project the following:

- Number of Vehicles
- Assessed Values
- Taxes and Vehicle Fees

Report Fields

Field	Description
Year For	Effective tax rate year for billed abstract
Jurisdiction	Tax jurisdiction
# of Bills	Total number of bills per jurisdiction
Appraised Value	Summary of total appraised value for all vehicles within a given jurisdiction
Exempt Value	Summary of total exempt value for all vehicles within a given jurisdiction
# of Vehicles with Vehicle Fee	Summary of the total number of vehicles assessed with a vehicle fee
Assessed Value	Summary of the total assessed value of all vehicles within a given jurisdiction Assessed Value = Appraised Value – Exempt Value
Property Tax	Summary of the total amount of property tax (excluding vehicle fees) within a given jurisdiction
Vehicle Fee	Summary of the total value of vehicle fees within a given jurisdiction

Field	Description
Total Tax	Summary of the total amount of vehicle tax, including vehicle fees within a given jurisdiction Total Tax = Property Tax + Vehicle Fee

NCVTS Vehicle Tax Collection Data Report

The NCVTS Vehicle Tax Collection Data Report can also be run based on transaction date

Purpose

The NCVTS Vehicle Tax Collection Data Report provides information for the following:

- Vehicle bill information
- Amounts paid and unpaid
- Summary of total taxes and amount paid by tax district

Report Fields

Field	Description
VIN Num	Vehicle identification number for vehicle bill listed on report
Vehicle Information	Vehicle description for vehicle bill listed on report
Bill Number	Bill number for vehicle bill listed on report
Bill Due Date	Bill due date for vehicle bill listed on report
Taxpayer Name	Vehicle owner of vehicle bill listed on report
Taxpayer Address	Mailing address for vehicle owner listed on report
Tax Jurisdiction	Tax jurisdiction(s) for vehicle bill listed on report
Levy Type	Applicable levy type for vehicle bill listed on report ► Tax ► Vehicle Fee

Field	Description
Taxes	Total taxes due on bill per levy type for bill listed on report
Amount Paid	Amount of tax paid on bill per levy type for bill listed on report

Upload Report

The Year For parameter will already be populated.

Purpose

The Upload Report is a monthly tax scroll and contains all the vehicles that should be renewed in the county. Abstracts shown on the report are run through different checks (edits) to see if they can be made RFB (ready for billing). Vehicle abstracts that do not pass all the edits are dropped into various queues to be worked. The report allows you to view and make changes to abstracts prior to billing. After billing changes are made through adjustments.

Report Fields

Field	Description
Abstract Number	Vehicle Abstract Number
Abstract Status Type	Status of Abstract **Note:** Abstracts that have a status of Received will be funneled into a queue
VIN Number	Vehicle Identification Number for vehicle
Title Number	Title Number for vehicle
Primary Taxpayer	Primary vehicle owner listed on abstract and bill
Secondary Taxpayer	Secondary vehicle owner listed on abstract
County Address ID	Unique situs address ID for vehicle
Parcel Number	Parcel number for situs address associated with vehicle
Situs Street Number or Range	Street Number or Street Range for vehicle abstract
Situs Parity	Used for street ranges: - Even - Odd - Mixed - Unknown
Situs Street Name	Situs address street name
City	Situs address city
Situs State	Situs address state
Zip	Situs address zip code
County Tax District	County Tax District on vehicle abstract
City Tax District	Applicable city tax district on vehicle abstract

Field	Description
Fire Tax District	Applicable fire tax district on vehicle abstract
Other Tax District	Other/Special tax district on vehicle abstract
Notes	Notes flag to indicate whether or not the vehicle abstract contains notes - Y- At least one note exists on abstract - N- No notes on abstract
Final Value	Final vehicle value listed on abstract; value that will be billed
Value	Vehicle value listed on abstract
DOR Value	DOR recommended value for vehicle listed on abstract
Prior Year Value	Prior year value of the vehicle
RMV Sales Price	DMV sales price for vehicle listed on the abstract. Information comes from STARS.
Exempt Code Type	Applicable exempt code for vehicle listed on abstract, if the vehicle is exempt in part or in full from vehicle tax/fees
Body Style	Body style code of vehicle listed on abstract
Make	Vehicle make of vehicle listed on abstract
Model	Vehicle model of vehicle listed on abstract
Year	Vehicle year of vehicle listed on abstract
Vehicle Wt	Vehicle weight for vehicle listed on abstract
Current Plate Exp Date	Current plate expiration date for vehicle listed on abstract
Plate Number	Plate number for vehicle listed on abstract
Plate Code	Plate code for vehicle listed on abstract
Plate Ctgy	Plate category for vehicle listed on abstract

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Chapter 3: NCVTS Finance Reports

The NCVTS Finance Reports Chapter describes the purpose of NCVTS reports that are recommended for use by county Finance staff to review, reconcile, and distribute county vehicle tax payments and refunds. This chapter provides information regarding non-standard report parameters and available report fields for each NCVTS Finance Report.

Objectives

- Understand the purpose of NCVTS Finance reports
- Understand non-standard report parameters that are available for applicable NCVTS Finance reports
- Understand the information contained in report fields for each NCVTS Finance report

Table of Contents

County Reconciliation Report

Purpose

The County Reconciliation Report is to be used to return detailed county payment and reversal data in NCVTS to reconcile against distribution reports from STARS for a given date range

Non- Standard Report Parameters

Non-Standard Report Parameter	Description
Transaction Start Date	Used as the start date in the transaction date range. Date last transaction occurred on abstract.
Transaction Through Date	Used as the end date in the transaction date range. Date last transaction occurred on abstract.

Report Fields

Field	Description
Year For	Effective tax rate year for billed abstract
Jurisdiction	Tax Jurisdiction using county financial import data
Vehicle Taxes	Payments where Levy_type = tax, excluding reversals and interest
Vehicle Fees	Payments where levy type = vehicle fee, excludes reversals and interest
Interest	All interest on vehicle fees and taxes, excluding reversals
Holds (+)	Funds not assigned (usually seen as an overpayment)

Field	Description
Total Payments	Sum of Taxes and Fees plus interest plus Holds_plus
Reversed Taxes	Reversals of levy type taxes, excludes reversals of interest
Reversed Fees	Reversals of levy type vehicle fees excludes interest
Total Reversed Taxes and Fees	Sum of reversed vehicle fees and reversed vehicle taxes
Reversed Interest	All reversed interest
Holds (-)	Reversed holds (reversal of overpayment refunds)
Total Reversals	Sum of Total reversed taxes and fees plus reversed interest plus Holds_minus
Credit Card	Payments associated to a credit card – includes all taxes, fees, reversals, Holds Plus, Holds_minus and interest
Debit Card	Payments associated to a debit card – includes all taxes, fees, reversals, Holds Plus, Holds_minus and interest

Pending Refund Report

Vehicle fees are never prorated, but will be released in the case of a full bill release or bill voidance.

Purpose

The Pending Refund Report shows refund data prorated by tax district, levy type (vehicle fee or tax), and interest for a given time period.

Non- Standard Report Parameters

Non-Standard Report Parameter	Description
Year for Refund Date	Effective tax rate year for billed abstract that is associated with a refund
Refund Transaction Date	Most recent refund activity that occurred during the date range that is set
Refund Types	Reason for Refund ► Overpayment ► Adjustment >=$100 ► Adjustment <=$100 ► Proration
Refund Status	Status of Refund ► Authorized ► Pending

Report Fields

Field	Description
Business Name	Vehicle owner's business name
First Name	Vehicle owner's first name
Middle Name	Vehicle owner's middle name
Last Name	Vehicle owner's last name + suffix
Address 1	Vehicle owner mailing address

Field	Description
Address 2	Additional line for vehicle owner mailing address
Address 3	City, State and Zip for vehicle owner mailing address
Refund Type	Type of Refunds ▶ Proration ▶ Adjustment
Bill #	Bill base number
Plate Number	License plate number
Status	Refund Status ▶ Pending ▶ Authorized
Transaction #	Refund Number
Refund Description	Generic description of refund
Refund Reason	Reason for refund
Create Date	Date Refund created
Authorization Date	Date Refund was authorized
Tax Jurisdiction	Relevant tax jurisdiction
Levy Type	Levy Type ▶ Tax ▶ Vehicle Fee
Change	Net change by tax district and levy type
Interest Change	Net change in interest by tax district and levy type
Total	Sum of NetChange and NetChangeInterest by tax district and levy type

County Finance Report

Purpose

The County Finance Report provides information on financial data and is divided into four areas:

- **Billing information** - provides data for Levies and number of vehicles as well as LRPs (Limited Registration Plates)
- **Collections** - shows amounts paid
- **Credit /Debit card cost allocation** - shows payment data made by Credit or Debit card
- **Total collected/ uncollected** - shows data for amounts paid and unpaid

Non-Standard Report Parameters

Non-Standard Report Parameter	Description
Payment Fiscal Year	Fiscal year vehicle bills were paid
Tax Districts	Tax Jurisdiction for which vehicle bills were paid

Report Fields

Vehicles could be in multiple tax districts, refer to the county jurisdiction for a true count.

Vehicles could be in multiple tax districts, refer to the county jurisdiction for a true net value.

Field	Description
Jurisdiction	Tax Jurisdiction
Nbr Vehicles	Count of number of vehicles that have been paid (or has LRP).
Renewal/LRP/Issue Net Values	Aggregated amount of the net value of vehicles in Tax district
Renew/Issue Levy (Tax)	Aggregated Taxes levied where payments were made
Renew/Issue Levy (VehicleFee)	Aggregated Vehicle Fees levied where payments were made
LRP Levy (Tax)	Tax Levies for LRP (may or may not have been paid)
LRP Levy (Vehicle Fee)	Vehicle Fee Levies for LRP (may or may not have been paid)

Field	Description
Gross Levy (Tax)	Total of Tax_Renewal_Issue_Levy and Tax_LRP_Levy
Gross Levy (Vehicle Fee)	Total of Fee_Renewal_Issue_Levy and Fee_LRP_Levy
Renew/Issue Collections (Tax)	Aggregated amount collected attributable to Taxes
Renew/Issue Collections (VehicleFee)	Aggregated amount collected attributable to Vehicle Fees
LRP Collections (Tax)	Aggregated amount collected attributable to LRP taxes
LRP Collections (Vehicle Fee)	Aggregated amount collected attributable to LRP vehicle fees
Net Collections (Tax)	Total of Tax_Renewal_Issue_Collected and Tax_LRP_Collected
Net Collections (VehicleFee)	Total of Fee_Renewal_Issue_Collected and Fee_LRP_Collected
% Collected	(Tax_Net_Collections+ Fee_Net_Collections)/(Tax_Gross_Levy + Fee_Gross_Levy) for month and tax district
Billing Cost %	(Tax_Net_Collections+ Fee_Net_Collections)/(sum of all (Tax_Net_Collections+ Fee_Net_Collections)in all tax districts for the given month)
Total Collection by Credit Card	Amount collected by credit card payment
Credit Card %	Percent of Net collections that can be attributed to a credit card payment Amt_Collected_Credit/ (Tax_Net_Collections+ Fee_Net_Collections)
Total Collection by Debit Card	Amount collected by debit card payment
Debit Card %	Percent of Net collections that can be attributed to a debit card payment Amt_Collected_Debit / (Tax_Net_Collections+ Fee_Net_Collections)
Interest Collected	Amount collected attributable to interest
Total Net Collections	Interest_Collected + (Tax_Net_Collections+ Fee_Net_Collections)
LRP Uncollected	LRP that has not been paid

NET Distribution Report

Purpose

The NET Distribution Report provides a summary by levy type for the total amount collected, net amount collected (takes into account STARS and non-STARS refunds) , and tracks refund information for each tax jurisdiction within a county. This report helps Finance staff accurately distribute vehicle tax monies to municipalities that the county collects for.

STARS transactions include payments and reversals made on vehicle bills from the STARS system. Non-STARS transactions originated in NCVTS due to county action.

The report pulls data based on a set of transaction date range parameters. These parameters look for payment and/or refund transactions that have occurred during the timeframe that is specified.

Non- Standard Report Parameters

Non-Standard Report Parameter	Description
Transaction Date	This is the start date for the transaction date range parameters.
End Date	This is the end date for the transaction date range parameters .
Batch Source	Payment batch source for refund ► STARS ► Non-STARS

Report Fields

Field	Description
Jurisdiction	Tax Jurisdiction
Levy Type	Levy Type for applicable transactions: ► TAX

Field	Description
	▸ VEHICLE FEE ▸ REFUND
Levy ($)	Levy value by type per jurisdiction
Interest ($)	Paid interest per jurisdiction
Net Adj ($)	Net value of adjustments that have resulted in either bill increases or decreases per jurisdiction
Net Adj Interest ($)	Net of interest that has been released or added after a bill adjustment
Other ($)	Value of other transaction types that have occurred during the date range specified e.g. Overpayments
Net Levy ($)	Net Levy = Levy + Interest - Net Adj – Net Adj Interest + Other

APPENDICES

Appendix A: NCVTS Terminology

Many of the words, terms, and acronyms used to describe the North Carolina Vehicle Tax System and related applications may not be familiar to you. This section is intended to give you a basic understanding of terminology used during the course and beyond.

Abstract	Each month, the Department of Motor Vehicles sends information to NCVTS about vehicles up for registration renewal. The information for a single vehicle is called an Abstract. A single vehicle will have a separate abstract every year. Alternate terminology: *Listing, Record, Vehicle Record*
Situs Address	The physical street address where a vehicle resides. The dictionary definition of situs is “the place where something exists.” Corresponding STARS field: *Vehicle Location*
Situs Repository	The list of all physical (situs) addresses in a single county’s NCVTS system.
Alias (Situs Address)	When a street address has alternate names, such as a Rural Route number and a street name, all unofficial names are considered aliases. These aliases can be added to NCVTS so that they can be matched to a vehicle tax record for correct tax districts and rates.
DMV Upload	Each month, the Department of Motor Vehicles (DMV) sends the full list of vehicle records up for renewal to NCVTS. This monthly process is called the DMV Upload. Alternate terminology: *Renewal tape*
RFB (Ready for Bill)	Abstracts that are sent from the DMV through the DMV Upload process that do not require additional review by anyone in your county are automatically marked with a status of RFB, or Ready for Bill.
STARS	The NCDMV uses STARS (State Titling and Registration System) to track vehicle registration and renewals in North Carolina. There are many occasions where information is passed between STARS and NCVTS during the course of renewals, billing, and collections.

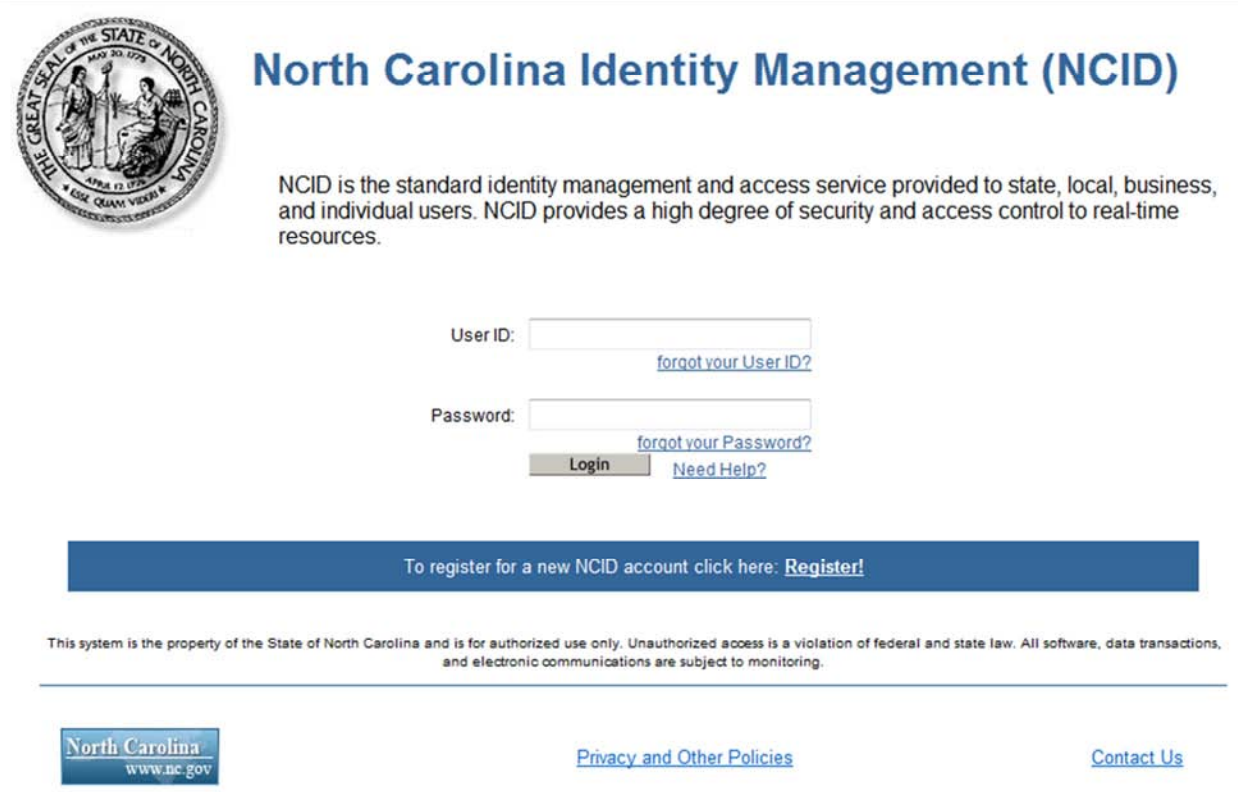
NCVTS Terminology (continued)

Queue	A set of records that share common information and require work and/or review by county personnel. For example, abstracts that include notes for review are accessible from a single "queue" called the NOTES queue.
Valuation Process	When the DMV Upload occurs, NCVTS attempts to assign each vehicle a value. NCVTS uses the county, make, year, VIN, and body type to determine the value of a vehicle. Alternate terminology: *TEC Data Systems, Inc.*

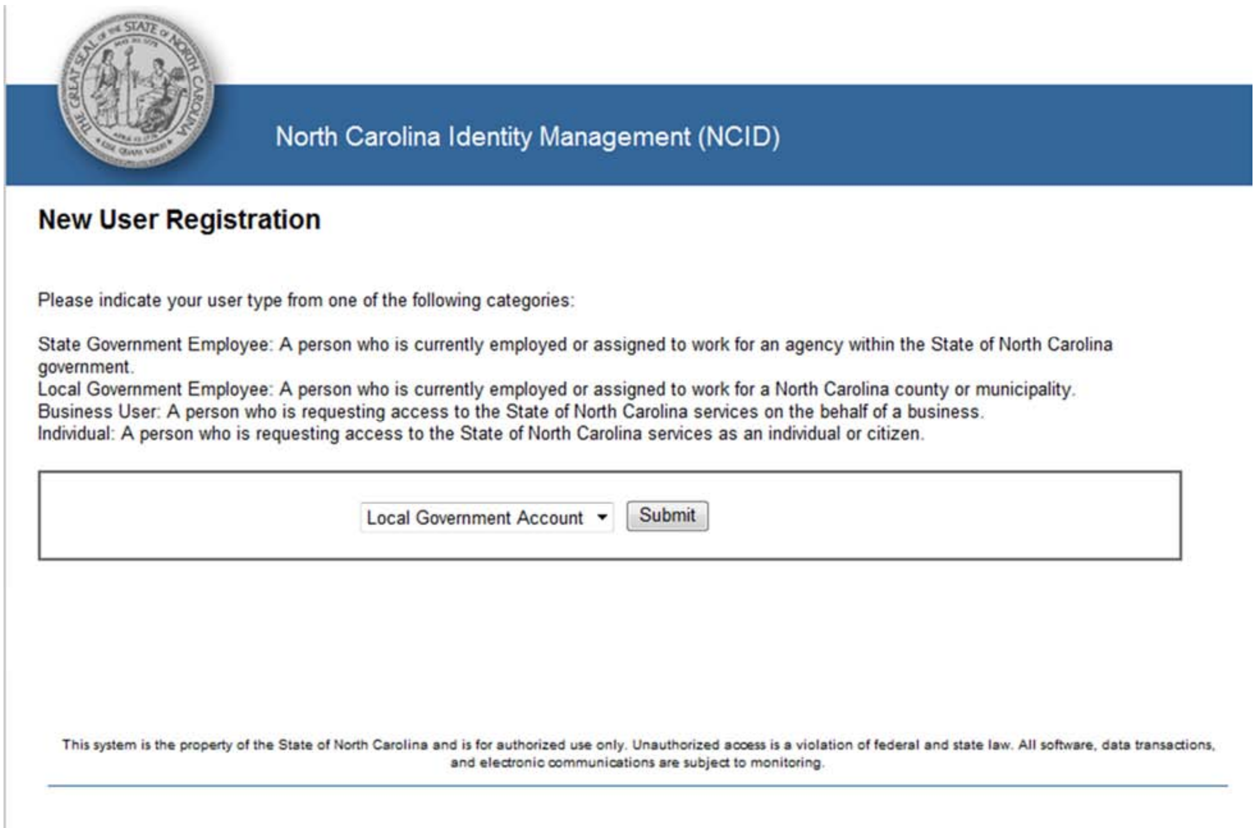
Appendix B: NCID Instructions

Instructions to Setup an NCID Tax Administration Division in Your County

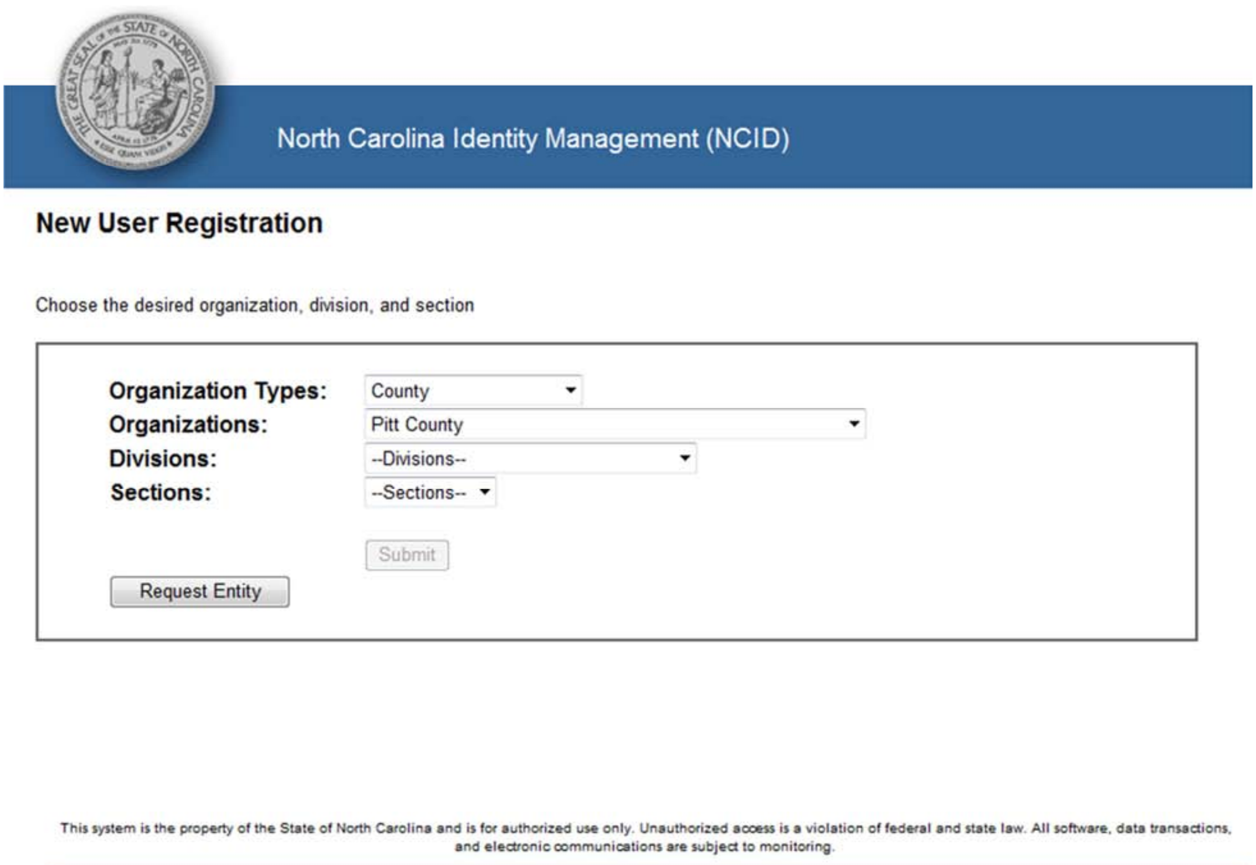
1. Determine if your county has an NCID Tax Administration group (division) by accessing the following site: https://www.ncid.its.state.nc.us/NCID_County_gov_map.asp
2. If your county already has an NCID Tax Administration division setup, please proceed to Step 8.
3. If your county does not have an NCID Tax Administration division, you can establish one by taking one of the following actions:
    a. If you have an NCID County Administrator (see link above), contact that person and request that he / she setup a Tax Administration division for your county. The County Administrator will submit a request to ITS to establish the division. Once the division is setup, please proceed to Step 8.
    b. If you do not have an NCID County Administrator, select the following URL to setup a Tax Administration division for your county on the NCID Registration page: https://ncid.nc.gov/



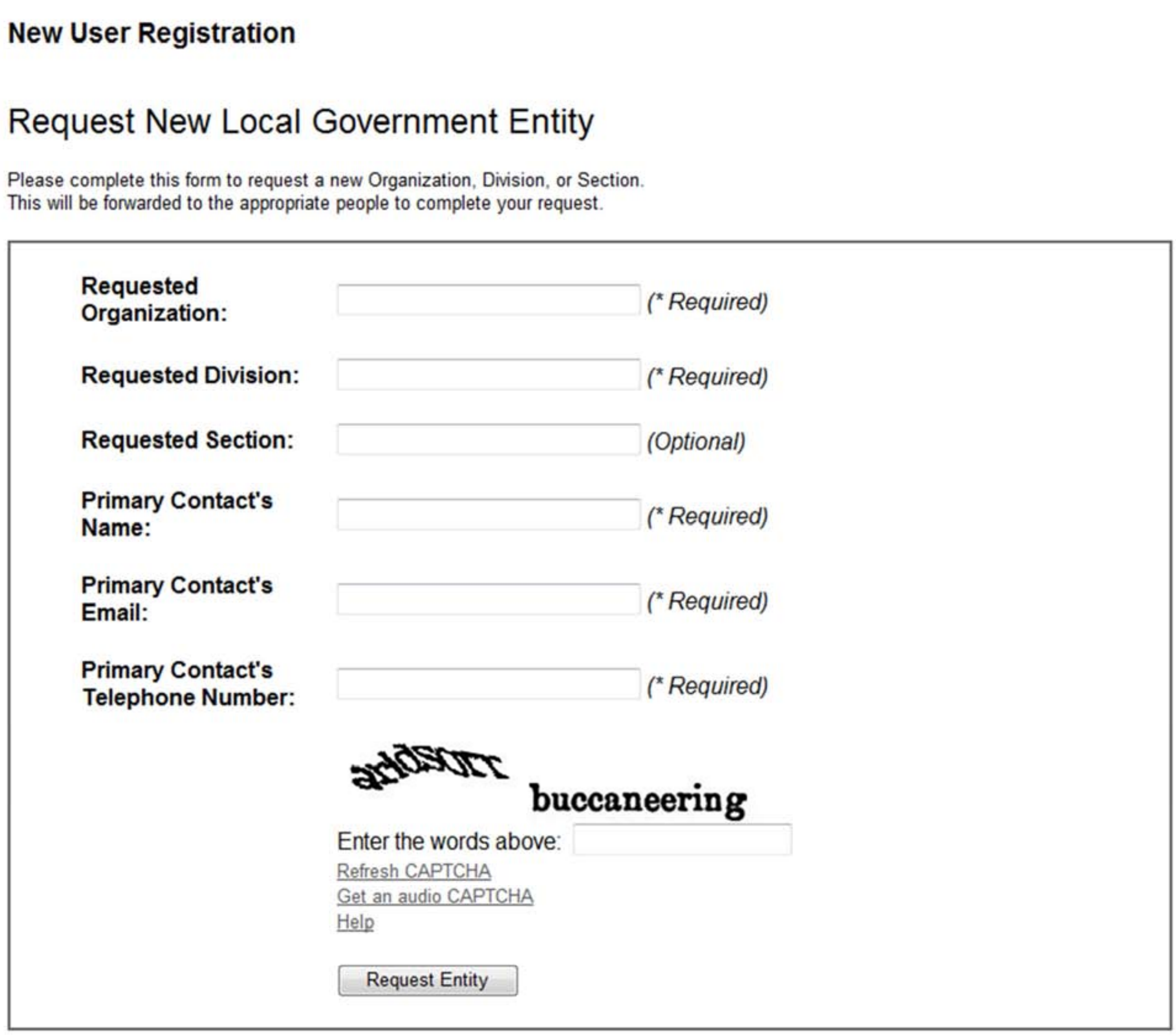
4. Select the Register link in the blue highlighted section of the NCID Login page.



5. *Select "Local Government Account" from the drop-down and select the Submit button.*



6. Select "County" for Organization Types. Select your county for Organizations. Then select "Request Entity" to request a Tax Administration division for your county.



New User Registration

Request New Local Government Entity

Please complete this form to request a new Organization, Division, or Section.
This will be forwarded to the appropriate people to complete your request.

Requested Organization:		(* Required)
Requested Division:		(* Required)
Requested Section:		(Optional)
Primary Contact's Name:		(* Required)
Primary Contact's Email:		(* Required)
Primary Contact's Telephone Number:		(* Required)

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Enter the words above:

Refresh CAPTCHA

Get an audio CAPTCHA

Help

Request Entity

7. For Requested Organization, enter your county (i.e., Pitt County). For Requested Division, enter "Tax Administration". Enter your name, email, and telephone number. Enter the confirmation words and then select the "Request Entity" button.
8. Once your county NCID Tax Administration Division is setup, your users can then register for their NCIDs. https://ncid.nc.gov/
9. Select "Local Government Account" and submit.
10. On the following page, select "County" for Organization Type, select your county from the Organizations drop-down, select your Tax Department or Tax Administration from the Divisions drop-down, and select submit. In some cases, the user may self-register, but the user may be required to request the NCID through a Delegated Administrator for the county.

Appendix C: Situs File Layout/Data Elements

File format for uploading Situs information into NCVTS. Counties are expected to submit master situs address data, alias data and one default physical address for their county. This information is the master address file for valid addresses and will be used during load process for identifying valid tax districts. Counties have an option for submitting separate files for situs address data, alias data and one default physical address. These records are identified by record type in data collection file. This is "~" delimited file. Combination of County address ID and Effective date will be used as key for address update by this interface.

Field Description	Data Type	Field Length	Required Conditional Optional	Notes	Examples
County Code	characters	5	R	First five characters of county	RANDO
Record type	characters	1	R	S for Situs A for Alias D for Default	S
County Address Id	numbers	10	R		12345
Street name	characters	30	R		Main
Street prefix	characters	10	C	Standard abbreviation (N,NW, W, SW, S, SE, E, NE)	N
Street suffix	characters	10	C	Standard abbreviation (N,NW, W, SW, S, SE, E, NE)	S
Street type	characters	20	O	Standard street type abbreviations are provided in this document.	ST
Street number	numbers	6	C	Street number will point to an address point. When street number is provided street range should not be present.	100
Street range from	numbers	6	C	Street range from and to will provide range of situs data. When street range is provided street number should not be present.	100
Street range to	numbers	6	C		200
Parity	characters	1	O	Valid values are E for Even O for Odd M for Mixed U for Unknown	E
Parcel number	characters	20	O	10 digit PIN number of the parcel	1258963247
Street Misc.	characters	20	O		A-1A
City	characters	35	O	This information should be same as provided in section 9 for tax districts.	Charlotte

State	characters	2	O		NC
Zip code	characters	5	O		27713
Zip plus	characters	4	O		2345
Effective date	Date	8	R	Date in MMDDYYYY format	01012012
Expiration date	Date	8	O	Date in MMDDYYYY format	12312012
Alias street name	characters	30	O		Main
Alias street prefix	characters	10	O		S
Alias street suffix	characters	10	O		NW
Alias street type	characters	20	O	Standard street type abbreviations are provided in this document.	ST
Alias street number	numbers	6	O		500
Alias street range from	numbers	6	O		
Alias street range to	numbers	6	O		
Alias city	characters	35	O		Charlotte
Alias state	characters	2	O		NC
Alias zip code	characters	5	O		27713
Alias zip plus	characters	4	O		3234
Alias type		1	O	Valid values are Valid values are A: Abbreviation C: Name Change O: Other Name P: Preferred Name F: Former Name	A
Tax district type	characters	10	R	Tax District Type and Tax District will repeat to accommodate all tax districts for situs address. It will always start with COUNTY. Valid Tax district types are COUNTY CITY POLICE FIRE SPECIAL	COUNTY
Tax district	characters	10	R		MECK

The file record will look like the example given below, when sent to VTS.

1. Situs address record

RANDO~S~30~WEATHERLY~~~SQ~~0~999999~~8702743444~~RAMSEUR~NC~27316~~01011853~~~~~
~~ ~~~~~~COUNTY~G01~CITY~C05

2. Situs address record with annexation: For annexation NCVTS will receive two records. One is a "retirement" record that sets the expiration date for an existing repository record and the other is a "replacement" record with an effective date after that date. See example below. The county address ID in the replacement record may remain the same or a new one may be used.

RANDO~S~29~WEATHERLY~~~SQ~~0~999999~~8702743444~~RAMSEUR~NC~27316~~01011853~1231
2011~~~~~~~~~~~~COUNTY~G01~CITY~F05

RANDO~S~29~WEATHERLY~~~SQ~~0~999999~~8702743444~~RAMSEUR~NC~27316~~01012012~~~~~
~~~~~~~~COUNTY~G01~CITY~C05

3. Alias record: Alias are for address point or address range. The fields present for master records also need to be present for alias record. For example, if master record is an address point, street number and alias street number is required for record type A.

RANDO~A~55~WEATHERLY~~~SQ~100~~~~8702743444~~RAMSEUR~NC~27316~~01011853~~LIBERTY~
~~ST~100~~~RAMSEUR~NC~27316~~F~COUNTY~G01~CITY~C05

4. Default address record

RANDO~D~1001~ELM~~~ST~~~~~~~ASHEBORO~NC~27203~~01011853~~~~~~~~~~~~~COUNTY~G01~C
ITY~C01
~~~~~~~~

Appendix D: Situs Error Log Definitions

Error Code	Description
1.	Invalid record type, street type, direction prefix, direction suffix or no street name
2.	Date range overlaps with the date range of another record with the same County Address ID
4.	Incorrect county code
5.	Both a street number and a street range are present
6.	No tax district information
7.	Street number or range overlaps with another record on the same street in the upload
9.	County Address ID/Effective Date combination does not exist in the database or the upload
11.	Date range overlaps with another default address in the uploaded data
12.	Date range overlaps with an existing default address
13.	Would alter tax districts for an address that is attached to a valid bill
14.	Street number or range overlaps with another record on the same street in the database

Error Code	Description
15.	Would retire an address prior to the creation date of an attached abstract and no Generic address exists with matching tax districts
16.	Overlaps a database record which has no corresponding retirement record in the upload
17.	Effective date is null or invalid
18.	Expiration date is invalid
19.	Expiration date is before effective date
20.	City is invalid
21.	Alias city is invalid
22.	One or more invalid tax districts
23.	Neither a street range nor a street number is present
24.	Street range or street number is non-numeric or longer than six digits
25.	Parcel numbers of "GENERIC" are not permitted
26.	Alias record does not have a valid master Situs record
27.	Neither a valid city nor a zip are present

Error Code	Description
28.	Non-empty zip or zip plus that is invalid
29.	Missing or non-numeric county address ID
30.	One or more tax districts lacks a tax rate in the current year