



# VT PIE TRAINING 1

MUNICIPAL INFORMATION & SALES VALIDATION  
WINTER 2022






# TRAINING AGENDA

## AGENDA

- Municipal Process Overview
  - Municipal Information
  - Sales Validation
  - Support
- How to Request your Account
- Questions

Jurisdiction: Addison ▾ Year: 2022 ▾

|   |  |  |
|---|--|--|
|    | <b>Municipal Information</b><br><i>Manage evaluation information and review.</i> | <i>Review Complete (Comments Open)</i>   |
|   | <b>Equalization Study</b><br><i>Manage sales and run ratio studies.</i>          | <i>No Studies Found</i><br><b>Local Verification:</b> (10 / 10) Deeds<br><b>State Verification:</b> (9 / 10) Deeds |
|  | <b>Support</b><br><i>Request support from VT PVR and manage correspondence.</i>  | <i>2 Unresolved Items</i>  |

**Tax Roll Analysis** Reports ▾

**Resources**

- [VT PIE Parcel Viewer](#) - VT Pie Statewide GIS Site
- [PVR Municipal Home](#) - PVR's Municipal Home Page
- [VT Reappraisal Rules](#) - View Applicable Reappraisal Rules
- [NewsLetter](#) - PVR 2020 Newsletter



# MUNICIPAL INFORMATION

## WHAT HAS CHANGED?

- Towns can submit their local assessing staff to PVR Electronically.
  - You can also track local staff trainings and certifications.
- Towns can digitally answer PVRs questionnaire (answers can be carried over year over year).
- Towns can upload digital documents requested by PVR




# MUNICIPAL HOME PAGE

## IPTMS PROJECT


 VT PIE Test


 Home

 Entity

 Reports

 Help

 Settings

 Logout

Jurisdiction: Addison ▾

Year: 2022 ▾



### Municipal Information

Manage evaluation information and review.

Review Complete (Comments Open)



### Equalization Study

Manage sales and run ratio studies.

No Studies Found

**Local Verification:** (10 / 10)

Deeds

**State Verification:** (9 / 10)

Deeds



### Support

Request support from VT PVR and manage correspondence.

2 Unresolved Items

### Tax Roll Analysis

Reports ▾

#### Resources

[VT PIE Parcel Viewer](#) - VT Pie Statewide GIS Site

[PVR Municipal Home](#) - PVR's Municipal Home Page

[VT Reappraisal Rules](#) - View Applicable Reappraisal Rules

[NewsLetter](#) - PVR 2020 Newsletter



# MUNICIPAL INFORMATION

## GETTING STARTED

Addison / Municipal Information

 Please provide information about your staff, upload requested documentation, and answer PVR's questions before submitting

Evaluation Status: **Review Complete (Comments Open)**

[Submit](#)

Reports 



### Organization

*Manage and Track Resources and Organizational Structure*



### Documentation

*Manage and Track Reports and other Required Documents*



### Questions

*Manage and Respond to VT PVR*

| Activity                           | Date                  | User    |
|------------------------------------|-----------------------|---------|
| Completed Final Review             | 1/4/2022 9:13:52 AM   | State   |
| Started Final Review               | 1/4/2022 9:13:42 AM   | State   |
| Returned to Initial Review         | 1/4/2022 9:13:20 AM   | State   |
| Started Final Review               | 1/4/2022 9:13:08 AM   | State   |
| Started Initial Review             | 1/4/2022 7:57:19 AM   | State   |
| Draft Submitted for Initial Review | 12/28/2021 5:12:36 PM | Patrick |

Assessor Comment

Post-Evaluation Comment

[Edit](#)



# ORGANIZATION

## MANAGE MUNICIPAL STAFF

Please Provide Contact Info for:

- Assessor
- Listers
- Town Clerk
- Tax Collector
- Treasurer
- Delinquent Tax Collector



### Organization

*Manage and Track Resources and Organizational Structure*



# ORGANIZATION

## HOME PAGE

[Addison](#) / [Municipal Information](#) / [Organization](#)



Please provide information about your municipal staff. Submission of activities, certifications, trainings, and properties owned is optional.

### Organization

| Action                   | Name            | Department           | Position | Email               | Phone          | Linked Property |
|--------------------------|-----------------|----------------------|----------|---------------------|----------------|-----------------|
| <input type="checkbox"/> | Patrick Santoso | Assessing Department | Lister   | Patrick@axiomnh.com | (603) 969-4673 | 0               |

Showing 1 to 1 of 1 rows

Add



# ORGANIZATION

## ADD PERSONNEL

**Personnel**

|                        |                      |                      |                      |
|------------------------|----------------------|----------------------|----------------------|
| First Name             | Last Name            | Title                |                      |
| <input type="text"/>   | <input type="text"/> | <input type="text"/> |                      |
| Department             | Position             | Type                 | Term Expiration      |
| Assessing Department ▼ | Assessing Clerk ▼    | Appointed ▼          | <input type="text"/> |
| Address Line 1         |                      | Address Line 2       |                      |
| <input type="text"/>   |                      | <input type="text"/> |                      |
| City                   | State                | Postal Code          |                      |
| <input type="text"/>   | -Select- ▼           | <input type="text"/> |                      |
| Email                  | Phone                | Ext                  |                      |
| <input type="text"/>   | <input type="text"/> | <input type="text"/> |                      |



# ORGANIZATION

## ADD PERSONNEL

[Municipal Information](#) / [Organization](#) / [Activities \(Patrick Santoso\)](#)

### Personnel Details

Patrick Santoso

*Lister, Elected*

Patrick@axiomnh.com

(603) 969-4673

Edit

Activities

Certifications

Training

Properties

### Activities

|                | Activity       | %FTE    | Description |
|----------------|----------------|---------|-------------|
| <b>Actions</b> |                |         |             |
| ▼              | Administration | 100.00% | admin       |

Showing 1 to 1 of 1 rows

Add



# ORGANIZATION

## MANAGE MUNICIPAL STAFF

Remember Only Contact Info is Required

- Optional Tracking is provided for:
  - Activities
  - Training
  - Certifications
  - Properties Owned



### Organization

*Manage and Track Resources and Organizational Structure*



# VTPIE – PRO TIPS!

## KEY FEATURES

[Addison](#) / [Municipal Information](#) / [Organization](#)



Please provide information about your municipal staff. Submission of activities, certifications, trainings, and properties owned is optional.

### Organization

| Action                   | Name            | Department           | Position | Email               | Phone          | Linked Property |
|--------------------------|-----------------|----------------------|----------|---------------------|----------------|-----------------|
| <input type="checkbox"/> | Patrick Santoso | Assessing Department | Lister   | Patrick@axiomnh.com | (603) 969-4673 | 0               |

Showing 1 to 1 of 1 rows

Add



# DOCUMENTATION

## DOCUMENT ATTACHMENTS

- Attach Documents to Become Part of the Municipal File.



### Documentation

*Manage and Track Reports and other Required Documents*



# DOCUMENTATION





## AVAILABLE DOCUMENTS

[Addison](#) / [Municipal Information](#) / [Documentation](#)

 Please upload the requested information if it pertains to you.

### Documentation

[Download All](#)

| Action  |   | Document                                      | Required | Status      | Uploaded | Uploaded by | Review Status         | Review Comments |
|---|---|---|----------|-------------|----------|-------------|-----------------------|-----------------|
|  |  | RA-308 Detailed Reappraisal Compliance Plan   | No       | Not Started | N/A      | N/A         | No Deficiencies Noted |                 |
|  |  | RA-309 Detailed Reappraisal Compliance Report | No       | Not Started | N/A      | N/A         | No Deficiencies Noted |                 |



# DOCUMENTATION

## UPLOADING A DOCUMENT

### Attachments: RA-308 Detailed Reappraisal Compliance Plan

Select file on your device:

Select file...

Browse

Maximum individual file size is 50 MB. Allowable file types: DOC, DOCX, JPG, JPEG & PDF.

Upload

|                          | Filename                      | Size    | Uploaded           | Uploaded by                        |
|--------------------------|-------------------------------|---------|--------------------|------------------------------------|
| <input type="checkbox"/> | AOA IPTMS Schedule 2021_09_03 | 1153 KB | 1/11/2022 10:03 AM | vermont.test.localuser@axiomnh.com |

Showing 1 to 1 of 1 rows

< Return

Complete



# QUESTIONS

## ANSWER ANNUAL QUESTIONS FROM PVR

- Answer to questions can be re-used next year.
- Provides a knowledgebase about assessing information and practices across the state.



Questions


*Manage and Respond to VT PVR*



# QUESTIONS

## HOME PAGE

[Addison](#) / [Municipal Information](#) / [Questions](#)

 Please answer some basic questions from PVR.

[General Information](#) [Valuation Information](#) [Categories Information](#)

### Questions

| Action                   |                                     | Question  | Required | Answered | Reviewed |
|--------------------------|-------------------------------------|---|----------|----------|----------|
|                          |                                     |   |          |          |          |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | What are your Town Clerk's hours?               | Yes      | Yes      | No       |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | What are your Treasurer's hours?                | Yes      | Yes      | No       |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | What are your Delinquent Tax Collector's hours? | Yes      | Yes      | Yes      |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | What are your Assessor's/Lister's hours?        | Yes      | Yes      | No       |

Showing 1 to 4 of 4 rows



# QUESTIONS

## ANSWERS

What are your Town Clerk's hours?

Answer

Answer

12:00-1:00 Fridays

Prior Year Answer

Use Prior Answer

Cancel

Save & Next



# MUNICIPAL INFORMATION CHECKLIST

- Organization
  - Enter at Least Two Personnel
- Documentation
  - Upload Documentation (optional)
- Questions
  - Answer all PVR Annual Questions
  
- Click Submit!



## Organization

*Manage and Track Resources and Organizational Structure*



## Documentation

*Manage and Track Reports and other Required Documents*



## Questions

*Manage and Respond to VT PVR*



# SUBMISSION & REVIEW

## ANSWER ANNUAL QUESTIONS FROM PVR

Addison / Municipal Information

 Please provide information about your staff, upload requested documentation, and answer PVR's questions before submitting

Evaluation Status: **Drafting**

**Submit**

Reports ▾



### Organization

Manage and Track Resources and Organizational Structure



### Documentation

Manage and Track Reports and other Required Documents



### Questions

Manage and Respond to VT PVR

| Activity                  | Date | User |
|---------------------------|------|------|
| No matching records found |      |      |

Assessor Comment

Post-Evaluation Comment





# DEMONSTRATION MUNICIPAL INFORMATION



# EQUALIZATION STUDY

## SALES VALIDATION

- Verify Sales Information
  - Sale Price
  - Listed Value
  - Special Circumstances
  - Category Code
  - Personal Property
  - Concessions
  - Acreage
  - Lister Comments



### Municipal Information

*Drafting*

*Manage evaluation information and review.*



### Equalization Study

*No Studies Found*

**Local Verification:** (0 / 5)

*Deeds*

**State Verification:** (0 / 5)

*Deeds*

*Manage sales and run ratio studies.*



### Support

*No Unresolved Items*

*Request support from VT PVR and manage correspondence.*



# PTTR IMPORT PROCESS

## SALES VALIDATION



PTTR  
Form



Link to Grand  
List



Local  
Verification



State  
Verification

Link by PTTR Reported Span

- Updates PY Listed Value
- Updates Acreage
- Updates Category Code
- (From August Submission)



# SPECIAL CIRCUMSTANCES

## ARMS LENGTH TRANSACTIONS

- Sales to be used in the equalization study should be “Arms-Length”
  - A sale between two or more unrelated and unaffiliated parties acting independently and in their self interest.
  - The involved parties should have equal bargaining power and information leading them to agree upon a fair market price.
- Non-Arms Length Transactions (Special Circumstances)
  - Family Sale
  - Corporate/Stockholder (related business parties)
  - Foreclosure/Tax Sale
  - Estate Sale
  - Large Change Post Assessment



# SALES

## HOME SCREEN

Berlin / Equalization Study / Sales

Unverified

Reports

| Ref | Type | Status     | Verification | Questions | Document  | Date       | Price     | SPAN          |
|-----|------|------------|--------------|-----------|-----------|------------|-----------|---------------|
| 1   | Sale | Unverified | Included     | 0         | 0001-0002 | 12/9/2021  | \$225,000 | 060-018-11245 |
| 2   | Sale | Unverified | Included     | 0         | 0001-0005 | 12/10/2021 | \$105,000 | 060-018-11470 |
| 3   | Sale | Unverified | Included     | 0         | 0001-0007 | 12/9/2021  | \$250,000 | 060-018-10460 |
| 4   | Sale | Unverified | Included     | 0         | 0001-0010 | 12/15/2021 | \$150,000 |               |
| 5   | Sale | Unverified | Included     | 0         | 0001-0010 | 12/20/2021 | \$75,000  |               |

Showing page 1 of 1 with 5 total records.

Page Size 25 First Prev 1 Next Last





# SALES OVERVIEW

Berlin (2022) / Sales / Overview

Overview Properties Attachments Questions

Verify

## PTTR Information

Reference: 1  
Document: 0001-0002  
Sale Date: 12/9/2021

---

Grantee: Jane Smith  
Mailing: 123 Main St  
Faketown, VT 12345

Grantor: John Johnson  
Mailing: 123 Main St  
Faketown, VT 12345

## Grand List Information

SPAN: [060-018-11245](#) View Map 

Local ID: 060-018-11245  
PY Cat Code:  
Acreage (PY): 10.10 (10.10)  
Situs: 675 BARTLETT RD  
Mailing: 675 BARTLETT ROAD  
Owner: HEDDING DAVID SMITH-HEDDING AMANDA  
Legal: 10.1 ACRE LAND

## Verification

|                           | <u>PTTR</u>              | <u>Lister Edit</u>       |
|---------------------------|--------------------------|--------------------------|
| Real Property Sale Price: | \$225,000                | \$225,000                |
| Listed Value:             | \$213,100                | \$213,100                |
| PY Listed Value:          | \$213,100                | \$213,100                |
| Special Circumstances:    | Included                 | Included                 |
| Category Code:            | MHL - Mobile home landed | MHL - Mobile home landed |
| <hr/>                     |                          |                          |
| Total Sale Price:         | \$225,000                | \$225,000                |
| Person Prop Value:        | \$0                      | \$0                      |
| Concession:               | \$0                      | \$0                      |
| Acreage:                  | 10.10 (10.10)            | 5.00                     |

Local Comment:

*Sale has not been verified*



# VERIFY SALE

### Verify Sale

|                          |         |
|--------------------------|---------|
| Real Property Sale Price | 160,000 |
| Listed Value:            | 164,800 |
| PY Listed Value:         | 164,800 |
| Total Sale Price:        | 165,000 |
| Personal Property:       | 5,000   |
| Concession:              | 0       |
| Acreage:                 | 5.00    |

*Please Provide SPAN of abutting property*

Special Circumstances (Local):

Category Code (Local):

Comments:



# SUBMIT YOUR SALE TO PVR

## OR SAVE FOR LATER!

Andover (2022) / Sales / Overview

Overview Properties Attachments Questions

Submit

Verify

### PTTR Information

Reference: 2  
Document: 0001-0005  
Sale Date: 12/10/2021

---

Grantee: Roger Black  
Mailing: 500 Heidi Ln  
Faketown, VT 12345

Grantor: Roger Doe  
Mailing: 500 Heidi Ln  
Faketown, VT 12345

### Grand List Information

SPAN: [012-004-10206 View Map](#) 

Local ID: 012-004-10206

PY Cat Code:

Acreage (PY): 15.00 (15.00)

Situs: 1663 NORTH HILL RD

Mailing: 1663 NORTH HILL RD

Owner: RALSTON JESSICA JONES WILLIAM D

Legal:

### Verification

|                           | <u>PTTR</u>                           | <u>Lister Edit</u>                    |
|---------------------------|---------------------------------------|---------------------------------------|
| Real Property Sale Price: | \$160,000                             | \$160,000                             |
| Listed Value:             | \$164,800                             | \$164,800                             |
| PY Listed Value:          | \$164,800                             | \$164,800                             |
| Special Circumstances:    | Included                              | ABUTTER SALE                          |
| Category Code:            | R2 - Residential with 6 or more acres | R2 - Residential with 6 or more acres |
| <hr/>                     |                                       |                                       |
| Total Sale Price:         | \$165,000                             | \$165,000                             |
| Person Prop Value:        | \$5,000                               | \$5,000                               |
| Concession:               | \$0                                   | \$0                                   |
| Acreage:                  | 15.00 (15.00)                         |                                       |
| <hr/>                     |                                       |                                       |
| Local Comment:            | 100-001-00122                         |                                       |



# PTTR COULDN'T LINK TO GRAND LIST

Andover (2022) / Sales / Overview

Overview **Properties** Attachments Questions

[Please Attach the sale property on the properties tab.](#)

### PTTR Information

|            |                                   |
|------------|-----------------------------------|
| Reference: | 1                                 |
| Document:  | 0001-0002                         |
| Sale Date: | 12/9/2021                         |
| <hr/>      |                                   |
| Grantee:   | Jane Smith                        |
| Mailing:   | 123 Main St<br>Faketown, VT 12345 |
| Grantor:   | John Johnson                      |
| Mailing:   | 123 Main St<br>Faketown, VT 12345 |

### Grand List Information

|               |  |
|---------------|--|
| SPAN:         |  |
| Local ID:     |  |
| PY Cat Code:  |  |
| Acreage (PY): |  |
| Situs:        |  |
| Mailing:      |  |
| Owner:        |  |
| Legal:        |  |

### Verification

|                           | <u>PTTR</u>    | <u>Lister Edit</u> |
|---------------------------|----------------|--------------------|
| Real Property Sale Price: | \$650,000      | \$650,000          |
| Listed Value:             | \$0            | \$0                |
| PY Listed Value:          | \$0            | \$0                |
| Special Circumstances:    | Included       | Included           |
| Category Code:            | C - Commercial | C - Commercial     |
| <hr/>                     |                |                    |
| Total Sale Price:         | \$650,000      | \$650,000          |
| Person Prop Value:        | \$0            | \$0                |
| Concession:               | \$0            | \$0                |
| Acreage:                  |                |                    |
| <hr/>                     |                |                    |
| Local Comment:            |                |                    |

Verified by vermont.test.localuser@axiomnh.com | 12/14/2021



# PTTR COULDN'T LINK TO GRAND LIST

**Search Query**

Address

Account#   Owner

Legal

**Search Results (4)**

|                                     | Id            | Account #   |               | County | Legal             | Address                | Owner   |
|-------------------------------------|---------------|-------------|---------------|--------|-------------------|------------------------|---|
| <input checked="" type="checkbox"/> | 012-004-10426 | 01200410426 | 012-004-10426 |        | RT 11             | 1834 SIMONSVILLE RD    | SMITH JARED ROWELLS INN LLC                       |
| <input type="checkbox"/>            | 012-004-10458 | 01200410458 | 012-004-10458 |        | BLANCHARD RD      | BLANCHARD RD           | SMITH ROSA LEADER TRUSTEE SMITH ANTHONY M TRUSTEE |
| <input type="checkbox"/>            | 012-004-10461 | 01200410461 | 012-004-10461 |        | HOWARD HILL RD    | 1035 HOWARD HILL RD    | SMITH DENNIS SMITH CATHERINE                      |
| <input type="checkbox"/>            | 012-004-69938 | 01200469938 | 012-004-69938 |        | WESTON ANDOVER RD | 3236 WESTON ANDOVER RD | NUTTLE CHRISTOPHER M SMITH GENEVA A               |



# RELEASING ALL VERIFIED SALES TO PVR

Andover / Equalization Study / Sales

Verified

Release

Reports

| <input type="checkbox"/> | Ref | Type | Status   | Verification | Questions | Document  | Date       | Price     | SPAN          |
|--------------------------|-----|------|----------|--------------|-----------|-----------|------------|-----------|---------------|
| <input type="checkbox"/> | 1   | Sale | Verified | Included     | 0         | 0001-0002 | 12/9/2021  | \$650,000 |               |
| <input type="checkbox"/> | 2   | Sale | Verified | ABUTTER SALE | 0         | 0001-0005 | 12/10/2021 | \$160,000 | 012-004-10206 |
| <input type="checkbox"/> | 3   | Sale | Verified | ABUTTER SALE | 0         | 0001-0007 | 12/9/2021  | \$250,000 | 012-004-10295 |
| <input type="checkbox"/> | 5   | Sale | Verified | ABUTTER SALE | 0         | 0001-0010 | 12/20/2021 | \$75,000  | 012-004-10461 |

Showing page 1 of 1 with 4 total records.

Page Size

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First

Prev

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Last







# DEMONSTRATION

## SALES VALIDATION



# SUPPORT

## GET ADVICE FROM PVR

- Request help from PVR!
  - Process help and recommendations
  - Technical support should come to Axiomatic (info at the end of presentation)



### Municipal Information

*Drafting*

*Manage evaluation information and review.*



### Equalization Study

*No Studies Found*

*Manage sales and run ratio studies.*

**Local Verification:** (0 / 5)

*Deeds*

**State Verification:** (0 / 5)

*Deeds*



### Support

*No Unresolved Items*



*Request support from VT PVR and manage correspondence.*



# SUPPORT HOME PAGE

Andover / Support

Show Deleted

|   | Action  | Subject        | Topic              | Status | Created By                         | Created Date          | Updated By | Updated Date |
|---|---|----------------|--------------------|--------|------------------------------------|-----------------------|------------|--------------|
|   |   |                |                    | Open   |                                    |                       |            |              |
|  |  | Make inactive? | Contiguous Parcels | Open   | vermont.test.localuser@axiomnh.com | 12/14/2021 4:38:11 PM |            |              |

Showing 1 to 1 of 1 rows

Create New Topic



# PVR SUPPORT MESSAGE BOARD

[Andover](#) / [Support](#) / [Thread](#)

## Make inactive?

[vermont.test.localuser@axiomnh.com](#) (posted on 12/14/2021 11:38:11 AM)  
should I?

[vermont.test.localuser@axiomnh.com](#) (replied on 1/12/2022 2:33:01 PM)  
Yes you should!





# RECOMMENDATIONS FOR SUCCESS

- Get Started with Municipal Information
- Move onto Sales Validation
- Remember Key Program Features:
  - Bread Crumb Navigation

Andover / Municipal Information / Organization

- Integrated Help

 Please provide information a

- Action Menu

Action



## Municipal Information

*Drafting*

*Manage evaluation information and review.*



## Equalization Study

*No Studies Found*

*Manage sales and run ratio studies.*

**Local Verification:** (0 / 5)

*Deeds*

**State Verification:** (0 / 5)

*Deeds*



## Support

*No Unresolved Items*

*Request support from VT PVR and manage correspondence.*



# NEXT STEPS FOR SUCCESS

- You received an email from Nella Poquette on 1/20/2022 with a Link to a Web Form To Request a User Account.
- [Request.vtpie.org](http://Request.vtpie.org)
- You will receive an email form [support@axiomnh.com](mailto:support@axiomnh.com) with an account activation link.



## Municipal Information

*Drafting*

*Manage evaluation information and review.*



## Equalization Study

*No Studies Found*

*Manage sales and run ratio studies.*

**Local Verification:** (0 / 5)

*Deeds*

**State Verification:** (0 / 5)

*Deeds*



## Support

*No Unresolved Items*

*Request support from VT PVR and manage correspondence.*



# TRAINING & HELP

- Help materials integrated throughout the application
- Help Icon on the primary menu
- Recorded Training Sessions
- Software Help: Axiomatic
- Process Help: PVR
- Training Feedback:
  - [Patrick@axiomnh.com](mailto:Patrick@axiomnh.com)

## Axiomatic Support



[support.axiomnh.com](https://support.axiomnh.com)



[support@axiomnh.com](mailto:support@axiomnh.com)



(603)413-4978 Ext. 0





# QUESTIONS

## VT PIE