# VTPIE Guide: NEMRC and CAMA Workflow Steps

Please refer to the following list of steps necessary to complete grand list tasks in VTPIE, NEMRC, and CAMA (may vary) systems. The Division of Property Valuation and Review (PVR) understands the steps may change next year. PVR will update these instructions as needed. In the meantime, this will provide a complete overview of the process. If you need the following instructions in another format, contact your District Advisor for assistance.

# **Step 1: Create a VTPIE Account**

This will allow access to all functions performed in VTPIE. Listers should each have their own unique account. Use these instructions to create your account in <a href="VTPIE">VTPIE</a> (<a href="https://support.axiomnh.com/support/solutions/articles/25000026875-creating-your-account">VTPIE</a> (<a href="https://support.axiomnh.com/support/solutions/articles/25000026875-creating-your-account">https://support.axiomnh.com/support/solutions/articles/25000026875-creating-your-account</a>).

### Step 2: Create a GIS Account

This will allow access to the GIS mapping portal in VTPIE. Listers should each have their own unique account. Use these instructions to create your <u>GIS account (https://support.axiomnh.com/support/solutions/articles/25000026875-creating-your-account)</u>.

### Step 3: Create a CAMA Upload File for VTPIE

Please see the general <u>VTPIE CAMA upload instructions</u> (https://support.axiomnh.com/support/solutions/articles/25000029336-general-vtpie-cama-upload-instructions) on how to create a file snapshot to move the working Grand List data from the GL (CAMA) via NEMRC to build VTPIE. This step imports your new grand list and value data from your CAMA system into VTPIE (name changes, value changes, new parcels, etc.)

#### Microsolve

See instructions for <u>NEMRC and Microsolve</u> (https://nemrc.com/support/webinars/NEMRC Grand List <u>Upload to VTPIE Option.pdf</u>) and <u>Grand List upload to VTPIE webinar (https://nemrc.com/support/webinars/VTPIE%20 upload.php)</u>.

### Patriot (AssessPro Classic or APS)

Working with your vendor, use the same process provided for NEMRC or Microsolve for 2023. See instructions specific to <a href="Patriot">Patriot</a> (AssessPro Classic or APS) (2024) (https://support.axiomnh.com/support/solutions/articles/25000029304-patriot-assesspro-classic-or-ap5-vtpie-export-instructions).

### ProVal 9.1

See instructions specific to <u>ProVal 9.1 (https://support.axiomnh.com/support/solutions/articles/25000029308-proval-9-1)</u>.

#### **Vision**

See instructions specific to the <u>Vision VTPIE Export (https://support.axiomnh.com/support/solutions/articles/25000029332-vision-vtpie-export-instructions).</u>



# **Step 4: Import the Grand List File into VTPIE**

Load and synchronize GL data to VTPIE. Repeat steps 3 and 4 (export from CAMA and import in VTPIE) as often as needed - end of day/ week as changes are made in your CAMA system to keep the systems in sync.

Be aware of how and what you are exporting from CAMA after you have created a billed grand list, You will want to make sure of each step.

# **Step 5: Review**

#### **Review Homesteads in VTPIE**

- See <u>Homestead Declaration Review Process instructions (https://support.axiomnh.com/support/solutions/articles/25000029362-reviewing-homesteads)</u>
- See <u>GB-1071</u>, Form HS-122: How to Download and Report to the Vermont Department of Taxes (https://tax.vermont.gov/sites/tax/files/documents/GB-1071.pdf)
- Homestead & CAMA Upload Webinar (https://support.axiomnh.com/support/solutions/ articles/25000029106-homestead-cama-upload-webinar)

Homesteads are to be *completed* in VTPIE: all review and reporting to the State occurs in VTPIE. Update CAMA as needed to reflect filings and then upload to VTPIE as needed to keep systems in sync (repeating steps 3 and 4).

### **Homesteads to NEMRC Tax Billing**

Initiate through NEMRC's Working GL module, and receive homesteads from the state. After processing in VTPIE, download homesteads into NEMRC. This allows NEMRC to receive and

- a. flag declared parcels as homestead, and
- b. apply the correct education tax rate for tax billing

### Review Current Use Records in VTPIE

 See reviewing current use records instructions (https://support. axiomnh.com/support/solutions/articles/25000029377-reviewing-current-use-records) Process available homesteads first, then upload working GL to VTPIE before beginning review and verification.

- <u>Grand List and Current Use Webinar (https://support.axiomnh.com/support/solutions/articles/25000029665-grand-list-and-current-use-webinar)</u>
- See <u>GB-1322</u>, <u>Municipal Officials</u>: How to Review and Manage Current Use Allocations in VTPIE (https://tax.vermont.gov/sites/tax/files/documents/GB-1322.pdf)

Current Use will be reviewed in VTPIE; all allocation input, change of allocation notices and the result of the grievance for current use will be completed using VTPIE.

#### **Current Use Allocation Notices**

See instructions (https://support.axiomnh.com/support/solutions/articles/25000029698-current-use-change-of-appraisal-notices).

#### Process when:

- Files are verified, and you are ready to lodge GL, or
- Pending individual files need re-notice

#### **Current Use to NEMRC Tax Billing**

The <u>help document (https://support.axiomnh.com/support/solutions/articles/25000029640-downloading-current-use-to-billing)</u> includes link for further instructions on receiving the file into NEMRC.

### **Lodging the Grand List**

Once you have completed homestead and current use review and verification, as well as all other valuation steps, lodging your grand list will be very similar to prior years. Please see <u>GB-1067</u>, <u>Grand List Lodging</u>: <u>Instructions for Listers (https://tax.vermont.gov/sites/</u>

Be aware of how and what you are exporting from CAMA after you have created your as billed grand list, you will want to make sure of each step.

#### tax/files/documents/GB-1067.pdf) for VTPIE updates.

You will complete the process(es) in NEMRC: change of appraisal notices, grand list, and reports, the result of the grievance, tax bills, grand list rollover, and submission of the 411 to PVR.

#### **Result of Grievance**

Notices for Current Use are located in VTPIE. Repeat <u>steps 3 and 4</u> to keep NEMRC and CAMA in sync. See <u>Current Use Change of Appraisal Notices instructions (https://support.axiomnh.com/support/solutions/articles/25000029698-current-use-change-of-appraisal-notices).</u>

### **Creating Grand List Entities and Annual Rollover**

Processed in NEMRC. See <u>instructions</u> (https://www.nemrc.com/support/grandList/LS\_M6\_MAKE\_LODGED\_ENTITY/).

#### Tax Billing

- Printing Tax Bills (https://www.nemrc.com/support/grandList/gl\_print\_taxbills.pdf)
- Tax Book (https://www.nemrc.com/support/grandList/LS R5 TAX BOOK/)
- Revised Bills Continue to process homestead declarations, current use changes, and errors and omissions using the above upload-and-download process between NEMRC and VTPIE (See steps 3 and 4).

# **System Reference Chart: VTPIE or CAMA**

The following chart outlines the general lister duties and highlights the system where these tasks will occur.

Element	Process	CAMA	VTPIE
Parcel Maintenance	Generation and management of SPAN	Χ	N/A
Parcel Maintenance	Processing transfers, splits, mergers	Χ	N/A
Parcel Maintenance	Management of contiguous parcels	Χ	N/A
Parcel Maintenance	Tracking of inactive parcels	Х	N/A
Personal Property	Creating and managing personal property	Х	

Element	Process	CAMA	VTPIE
Personal Property	Personal property exemptions	N/A	Х
Personal Property	Personal property grievance	N/A	Х
District Management	Village, Special, and School Districts	Χ	N/A
District Management	Tax Increment Finance Districts (TIFs)	N/A	Х
Exemptions	Special	N/A	Х
Exemptions	Statutory	N/A	Х
Exemptions	Contracts	N/A	Х
Ratio Study & Equalization*	Sales Validation	N/A	X
Ratio Study & Equalization*	Ratio studies	N/A	Х
Ratio Study & Equalization*	Equalization	N/A	Х
Current Use*	Review of Current Use enrollment, unenrolled, or updates (enrolled acreage or enrolled buildings)	N/A	Х
Current Use*	Updating current Use land and building exemptions	N/A	Х
Current Use*	Total valuation of excluded land per appropriate land schedule	X	N/A
Current Use*	Total validation of enrolled farm buildings with an indicator that they are enrolled	Х	N/A
Current Use*	Total valuation of enrolled land (mathematical result of full value of all land minus the total value of excluded land	N/A	Х
Current Use*	Use value of enrolled land	Χ	Х
Current Use*	Current Use grievance	N/A	Х
Homestead*	Receiving and reviewing homestead declarations	N/A	Х
Homestead*	Homestead and housesite valuation	Χ	N/A
Valuation	Valuation of all taxable and insurance value of real and personal properties	Х	N/A
Valuation	Allocating homestead and nonhomestead values	Χ	N/A

<sup>\*</sup>Please note that for the 2023 Grand List, Current Use, Sales Validation, and Homestead processing will be in VTPIE. The remaining Grand List functions, including tax billing, grievance, and personal property, will remain in NEMRC for the 2023 Grand List and have been in prior years.