

myVTax guide for Municipal Listers presented at 2018 TOEC

Navigating the Lister verification process

Presenters: Marylee Woods and Teri Gildersleeve

April 10, 2018

General email notification of PTTR to review

Thu 03/22/2018 3:29 PM

T TAX - myVTax Info <myVTaxInfo@vermont.gov>

Testing: VTS New Property Transaction(s) Available

To  Woods, Marylee

This is an automated message from the Vermont Department of Taxes regarding your myVTax account. Please do not respond to this email directly.

A Property Transfer Tax return has been submitted for one or more of the towns on which you are an assessor. Please sign into your myVTax account in order to complete your review for the Equalization Study.

Contact information:

Vermont Department of Taxes Call: (802) 828-6802

133 State Street

Or Email: [myVTax Support](#)

Montpelier, VT 05602-3667

When you have a new PTTR to review, you will receive an email notification at the email address used to set up your account. Because email is not secure, it contains no details but lets you know to check your myVTax account.

Reviewing returns to validate or invalidate them for the equalization study



I Want To

Validate Sales for the Equalization Study

Create Additional Username

Send us a message

From your myVTax home screen under **I want to**, click the bold **Validate Sales for the Equalization Study** link to get started.

Your worklist queue PTTR to be reviewed

Clicking the link to validate sales will bring you to your active work queue. Here are any PTTRs that are awaiting your review. Click on the bold **Property Address** link to access the return information and begin your review. Once you have completed your review, items will go into the **Transaction History** tab.

The screenshot shows a software interface with two tabs: "Equalization Study Active Work List" (selected) and "Transaction History". Below the tabs is a search bar containing "wonka" with a yellow star icon. To the right of the search bar is a "Filter" button. Below the search bar is a table with the following columns: "Property Address", "Transferee Name", "Transferor Name", "SPAN", "Sales Price", and "Closing Date". The first row of the table is highlighted in light blue and contains the following data: "14 WONKA AVENUE", "CHARLIE BUCKET", "GRANDPA JOE", "00300144444", "15,000.00", and "Mar-01-2018". The second row contains: "1 WONKA AVENUE", "CHARLIE BUCKET", "WONKAS CHOCOLATE FACTORY", "00300177777", "150,000.00", and "Mar-01-2018". A red oval highlights the "14 WONKA AVENUE" text in the first row. A green callout box with a white background and black text says "These lists may get lengthy; take advantage of the filter function here, too!". A blue arrow points from the text in the callout box to the search bar. Another blue arrow points from the text in the callout box to the "14 WONKA AVENUE" text in the first row. A third blue arrow points from the text in the callout box to the "Transaction History" tab.

Property Address	Transferee Name	Transferor Name	SPAN	Sales Price	Closing Date
14 WONKA AVENUE	CHARLIE BUCKET	GRANDPA JOE	00300144444	15,000.00	Mar-01-2018
1 WONKA AVENUE	CHARLIE BUCKET	WONKAS CHOCOLATE FACTORY	00300177777	150,000.00	Mar-01-2018

2 Rows

Link brings up PTT return info

PROPERTY TRANSFER TAX RETURN (PTT-172)

[Click here for full form instructions](#)
[Click here for myVTax FAQs](#)
[Quick Reference Guide](#)

Attention: All correspondence will be sent to the address listed under the primary transferee.

NOTE: Long names or addresses may not display fully on the paper copy of the return, but the full names and addresses are submitted electronically to the Town and Department.

Primary Transferor	Info Following Transfer
TRANSFEROR ID	SSN <input type="text"/> *****
TRANSFEROR NAME	JOE GRANDPA <input type="text"/> M.I. <input type="text"/>

Primary Transferee	Info Following Transfer
TRANSFEEE ID	SSN <input type="text"/> *****
TRANSFEEE NAME	BUCKET CHARLIE <input type="text"/> M.I. <input type="text"/>

Once you click on the **Property Address** link, you'll see the return information as entered by the preparer. Fields such as **E1 - Property Transfer Tax exemption number** cause some confusion because these lines mention only a number or a statutory reference associated with the option chosen by the preparer. This is where the **quick reference guide** can help. This guide outlines a brief description of each of the number choices on all applicable fields of the return. Access the guide using the link in the upper left hand corner of each return screen in myVTax. You can print this document, or save it to your computer for easy access at all times.

<input type="text" value="14 WONKA AVENUE"/>	Land Size (in Acres) <input type="text" value="1.00"/>	<input type="checkbox"/> This sale did not involve land
<input type="text" value="Addison"/>	SPAN <input type="text" value="003-001"/> - <input type="text" value="44444"/>	<input type="checkbox"/> Check this box if property is located in multiple cities or towns

D. Holding Period

Date Acquired by Transferor:	<input type="text" value="Jan-01-2015"/>	Date of Closing:	<input type="text" value="Mar-01-2018"/>	Years	<input type="text" value="3"/>	Months	<input type="text" value="2"/>
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E. Exemptions

E1. Property Transfer Tax, enter exemption number	<input type="text" value="00 None"/>
E2. If sale was between family members, enter corresponding number	<input type="text"/>
a. If Line E2 is "5" enter description	<input type="text"/>
E3. Land Gains exemption number	<input type="text" value="00 None (includes sale)"/>

Do you wish to continue without filling in all the required fields?

Warning: The above selection must be unchecked before submitting this return.

After you have reviewed all of the return information, click **Next** to continue your review.

Rate Schedule & Tax Due

Tax on Special Rate Property

J1. Portion of value eligible for special principal residence rate	<input type="text" value="0.00"/>	
J2. If transfer happened prior to July 1, 2011, enter the portion of the value eligible for special rate	<input type="text" value="0.00"/>	
J3. Total special rate value		<input type="text" value="0.00"/>
J4. Special tax rate for eligible value (see instructions)	<input type="text" value="0.005"/>	
J5. Tax due on portion of value eligible for special rate		<input type="text" value="0.00"/>
J6. Only if line E1 is "99", enter any portion of value in excess of \$110,000 but below \$200,000	<input type="text" value="0.00"/>	
J7. Tax Rate for exemption 99 only	<input type="text" value="0.0000"/>	
J8. Tax due on exemption 99 for portion of values less than \$200,000		<input type="text" value="0.00"/>
J9. Total Due on portion of value eligible for special rate		<input type="text" value="0.00"/>

Tax on General Rate Property

J10. Total price paid	<input type="text" value="15,000.00"/>	
J11. Price paid for personal property	<input type="text" value="0.00"/>	
J12. Price paid for real property	<input type="text" value="15,000.00"/>	
J13. Enter amount from Line J3 above	<input type="text" value="0.00"/>	
J14. Enter amount from Line J8 above	<input type="text" value="0.00"/>	
J15. Non-eligible amount [Subtract: Line J13 and Line J14 from Line J12]	<input type="text" value="15,000.00"/>	
J16. Tax rate (includes 0.002 Clean Water Fund, 32 V.S.A. § 9602a)	<input type="text" value="0.0145"/>	
J17. Tax due on General Rate Property		<input type="text" value="217.50"/>
TOTAL TAX DUE		
J18. Total Tax Due		<input type="text" value="217.50"/>

< Previous

Next >

Cancel

Here is the Clerk's recording info. Ask them to add notes in the **comments, additional information, etc.** field if they have any helpful information about this sale that the preparer has not included in the PTTR.

[Click here for full form instructions](#)
[Click here for myVTax FAQs](#)
[Quick Reference Guide](#)

Town Information

Book Number	<input type="text" value="1"/>	Page Number	<input type="text" value="2"/>	Grand List year of	<input type="text" value="2018"/>
City or Town	<input type="text" value="ADDISON"/>	Parcel Number	<input type="text" value="AL0255"/>	Date of Record	<input type="text" value="Mar-22-2018"/>
Grand List Value	<input type="text" value="528,300.00"/>	Grand List Category	<input type="text" value="01. Residential <6 Acres"/>	SPAN	<input type="text" value="003-001"/> - <input type="text" value="10007"/>
				Override SPAN	<input type="checkbox"/>

Comments, additional information, etc.

Corrections to be made to the return

Duplicate Return Suspected Portion of the property sold Original Return Waiting on Deed

Click next to continue to your review screen.

Lister verification PTT information review

1. Town Clerk View

2. Town Information

3. Equalization Study

Equalization Study - Property Information

Buyer's Last Name:

Original Values

Date of Closing:
SPAN: -
Grand List Value:
Parcel ID Number:
Grand List Category:
Land Size (in Acres):
Sale Price:
Date of Record:

Edited/New Values

Edit Closing Date:
Edit SPAN Last 5:
Edit Grand List Value:
Edit Parcel ID Number:
Edit Grand List Category:
Edit Land Size:
Edit Sale Price:
Edit Date of Record:

From the Grand List

Grand list values taken from year 2016

Grand List Value:
Grand List Parcel ID #:
Grand List Category:
Grand List Land Size:

Verify that this transaction is valid for the equalization study

Send Letter

Is this a valid transaction? This selection indicates whether or not this Property Transfer transaction is valid to include in the Equalization Study

Original values are the grey fields that show what was entered on the return by the preparer. Any grey fields cannot be edited.

Edited/New values are the white fields that must be changed if they are not correct. You can edit any white field even if it's not required.

From the Grand List are the grey values which reflect the value of the parcel in the Grand List at time of sale. Because they are grey, you cannot change these values.

< Previous

Submit

Valid sales

1. Town Clerk View

2. Town Information

3. Equalization Study

Equalization Study - Property Information

Buyer's Last Name:

Original Values

Date of Closing:
SPAN: -
Grand List Value:
Parcel ID Number:
Grand List Category:
Land Size (in Acres):
Sale Price:
Date of Record:

Edited/New Values

Edit Closing Date:
Edit SPAN Last 5:
Edit Grand List Value:
Edit Parcel ID Number:
Edit Grand List Category:
Edit Land Size:
Edit Sale Price:
Edit Date of Record:

From the Grand List

Grand list values taken from year 2016

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Verify that this transaction is valid for the equalization study

Send Letter
Is this a valid transaction?

This selection indicates whether or not this Property Transfer Tax transaction is valid to include in the Equalization Study

Additional Comments:

Select **Yes** to mark the sale valid and then click **Submit** to complete your review. A note is not required in this case, but if you have any additional information about the sale--*even if you think it is small*--please take a minute to enter a note before you submit.

Invalid sale

Equalization Study - Property Information

Buyer's Last Name:

Original Values

Edited/New Values

From the Grand List

Date of Closing:

Edit Closing Date:

Grand list values taken from year 2016

SPAN: -

Edit SPAN Last 5:

Grand List Value:

Edit Grand List Value:

Grand List Value:

Parcel ID Number:

Edit Parcel ID Number:

Grand List Parcel ID #:

Grand List Category:

Edit Grand List Category:

Grand List Category:

Land Size (in Acres):

Edit Land Size:

Sale Price:

Edit Sale Price:

Date of Record:

Edit Date of Record:

Verify that this transaction is valid for the equalization study

Send Letter:

Is this a valid transaction? No

This selection indicates whether or not this Property Transfer Tax transaction is valid to include in the Equalization Study

Reason:

Relationship:

Additional Comments:

Click **No** to mark a sale invalid. If you click **No**, you must select a reason from the dropdown box.

Depending on the reason chosen, an additional drop down menu may appear. In this example a **Relationship** is now required.

Again, please make good notes to tell PVR what you know.

Don't forget to click **Submit**.

Not sure how to mark the sale, "Need more info"?

1. Town Clerk View

2. Town Information

3. Equalization Study

Equalization Study - Property Information

Buyer's Last Name:

Original Values

Date of Closing:

SPAN: -

Grand List Value:

Parcel ID Number:

Grand List Category:

Land Size (in Acres):

Sale Price:

Date of Record:

Edited/New Values

Edit Closing Date:

Edit SPAN Last 5:

Edit Grand List Value:

Edit Parcel ID Number:

Edit Grand List Category:

Edit Land Size:

Edit Sale Price:

Edit Date of Record:

From the Grand List

Grand list values taken from year 2016

Grand List Value:

Grand List Parcel ID #:

Grand List Category:

Grand List Land Size:

Verify that this transaction is valid for the equalization study

Send Letter

Is this a valid transaction? This selection indicates whether or not this Property Transfer transaction is valid to include in the Equalization Study

Reason:

Additional Comments:

If you need more information to determine if the sale is valid or not, check the **Send Letter** box and then click **Submit**. PVR will send letters to the buyer and the seller requesting more information.

Submission confirmation page

Confirmation

You have successfully completed your Lister Verification response for the Equalization Study for the following SPAN: 003-001-44444 and the confirmation number for this request is 0-074-654-720.

Should you have any questions or concerns regarding this property, please use contact the Vermont Department of Taxes with the information below:

Contact information:

Vermont Department of Taxes Call: (802) 828-5860
133 State Street Or Email: [myVTax Support](mailto:myVTax.Support)
Montpelier, VT 05602-3667

Print

OK

Make sure to write down this confirmation number or print this screen. This is the only screen where you can currently view the number. If you call us, we may ask for this number in order to assist you.

New Enhancements Coming Soon

- Better sorting variables in the Listers queue. No sort by first name.
- We will include the confirmation number associated with each PTTR reviewed as a column in your queue
- Export features will allow you to export PTTR search results, your work queue lists, etc.
- Reporting features will allow you to create a report to use to track your work
- Please send us a message from your myVTax account with feedback about usability or any issues you're having with this or any other myVTax process. We cannot guarantee to make everything happen, but we consider all input, and will not dismiss comments out of hand.

Thank you all for your continued support and feedback!
You are helping make the myVTax system a success.