Tips & Tricks

for Lister's Office Organization

Division of Property Valuation and Review Vermont Department of Taxes

http://tax.vermont.gov/municipal-officials/
(802) 828-5860

Tax.listered@vermont.gov

2018

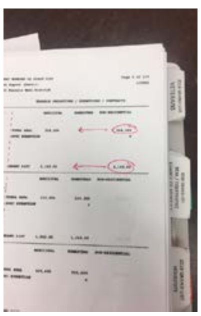
VERMONT
DEPARTMENT OF TAXES

Tips & Tricks for Lister Office Organization

Grand List

- Grand list in notebook in vault with all attachments –
  Remember all changes to the grand list in the vault should be attached as they occur including homestead declarations, current use changes, errors and omissions (with Selectboard approval), appeal results etc.

- Lister's can print their own working copy of the grand list to mark up changes throughout the year for reconciliation purposes the following year (Shrewsbury)



Example A

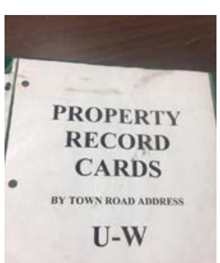
Property Files

- Property record cards in binder for public view (Shrewsbury)

Example B1

- Property record card file (suggested contents) (Pownal)
  - Property record card
  - Cost sheet
  - Deed(s)
  - History of property on spreadsheet

Example B2



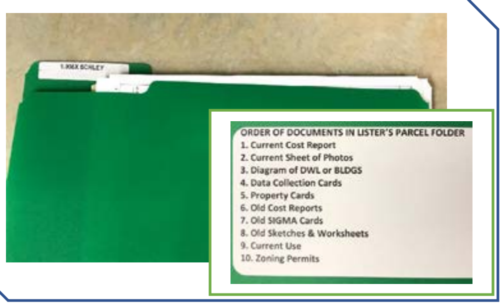
Tips & Tricks for Lister Office Organization

- Color coded files (each group of files are coded differently this could be by property type, road or neighborhood) (Londonderry / Montgomery
    - Regular property record file

Example B3

- In Regular files (idea from Reading)
    - correspondence on left side
    - photos, maps, drawings, zoning info, data collections, deeds, transfers on the right-hand side

- Plastic/vinyl (heavy duty) folders sorted by road (their IDs are determined by road)- (Montgomery)



Example B4

- Colored files or stickers on file to denote exempt, current use, utility properties (Londonderry and Montgomery)
- Inside each folder was a label that stated the correct order of the documentation for easy search and return (Montgomery)
- Sign out sheets and place holders for refiling (Montgomery)

Permit Process

- NEMRC/CAMA
    - Reinspect – this report can be run yearly to reinspect those properties that were marked as needing to be reinspected (see attached instructions for both reports)
    - Percent complete- this report can be run yearly to reinspect those properties that were valued at less than 100% complete

- Incomplete Permits Binder (Shrewsbury)

Example C1

- Create a shareable spreadsheet for zoning and listers with active permits

Tips & Tricks for Lister Office Organization

- Create a working box/file for inspection with a copy of each property record, permit info
- Property Record working values (separate file with new cost sheets for grievance – not for public view)

Example C2

Personal Property

- Link to personal property inventory form
  http://tax.vermont.gov/sites/tax/files/documents/PVR-4004.pdf
  - Make labels for mailing each year in April
  - Make sure to flag separately and print notices
  - Color coded files for Personal property

Example D

- **Separate Files- tag as confidential and place in separate filing cabinet**
  - Utility Folders - not for public view
  - Personal property inventory
  - Income and expense information

Example E

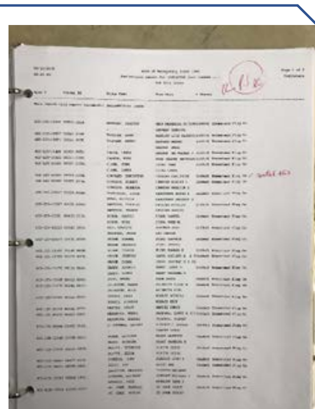
Grievance Process

- Sale book with information on sales for access to comparables as needed
- Color coded files behind regular file
  - Grievance / Appeals
- Application for grievance – property owners can take- copies available (Reading)
- Board of Civil Authority (BCA) book (Shrewsbury)

Example F

Homestead

- Binder with reports for each download and 411 after download for reconciliation (Shrewsbury)
- Read and follow HS122 Download directions
  https://tax.vermont.gov/sites/tax/files/documents/HS-122InstructsForMunicipalitiesGB.pdf



Example G

Current Use

- On regular property record file- Current use information was kept inside the lister file (add color marking to note if enrolled in current use) (Londonderry) OR

- Current use files are separated from regular file – each file has
    - correspondence on left hand side
    - maps and calculations on the right-hand side

Example H

- Current use calculation with worksheet and calculation method – see example

Reconciliation

- Working grand list in notebook at lister's desk (cross check for nest year)

- 411 file
    - Each time any change is done to the 411 a new one is printed and written on what the change is and balanced to previous 411 (Shrewsbury)

Example I

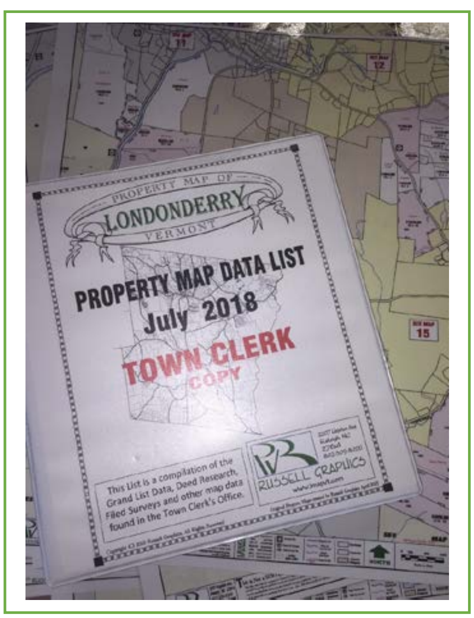
Mapping Process

- Notification process for mapping updates/errors and issues

- Printed map portion of property in each property record

- Large town map on wall with NH delineations in color

- Large town map on wall for sales indicators- colored pins for % differences – Listed Value / Sale Price



Example J

Tips & Tricks for Lister Office Organization

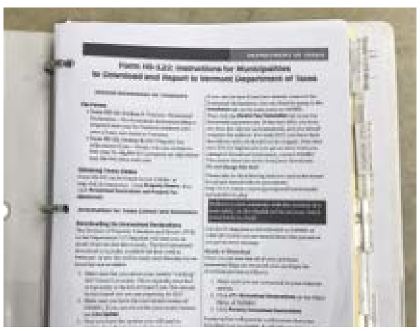
Lister Guides

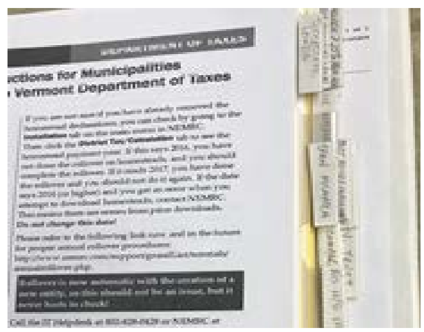
- Computer book – how to do anything so the next lister can be consistent
    - How to number parcel ids
    - Tax Map field
    - List owners
    - Property Address
    - 911 Address and abbreviations
    - Property description
    - Location A, B & C
    - Category Codes

Example K1

- Lister reference Book- all documents and references used and needed by listers in one book (Pawlet)

Example K2





- Lister Log Book

Example K3

Retention

- Stickers with retention date

Example K4

- Policy book for record retention

Transfers

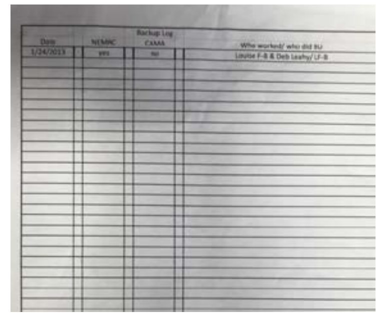
- Property Transfer Book (Shrewsbury)
    - PTTR
    - Deed
    - Copy of survey (if new)
    - Previous / New cost sheets showing change
    - Returned Sales Verification letters

Example L1

Tips & Tricks for Lister Office Organization

- Misc: Sales verification letters and questionnaires printed ahead of time with blank space for name and date – allows to grab and mail quickly
- Property sales book – properties for sale and sold
  - when the property sells copy the MLS sheet and place a copy on the property file

Example L2



Helpful Hints

- Marshall Swift (Black Book)
  - Create a book of local picture with quality grade
- NEMRC / CAMA
  - Programing F1 keys
  - Backup log CAMA / NEMRC
  - Exporting from NEMRC
  - Reports for acreage mismatch
  - Checking categories with acreage – either manually with other listers working copy of grand list or scanning parcel by parcel electronically

Data Collection

- Carry small flashlight
- Wear slip on shoes that are waterproof
- If using existing data – use erasable red pen
- Take picture of working file as a marker for pictures of dwellings and out buildings
- Always carry multiple tape measurers
  - Fiberglass breaks in cold weather
  - Metal can freeze
  - Laser are good for interior but expensive
  - Wheels are good for interior specially warehouses
- Use a clipboard that has an enclosure to keep documents dry
- When sketching place measurements in the drawing for the dwelling and outside of drawing for porches or decks

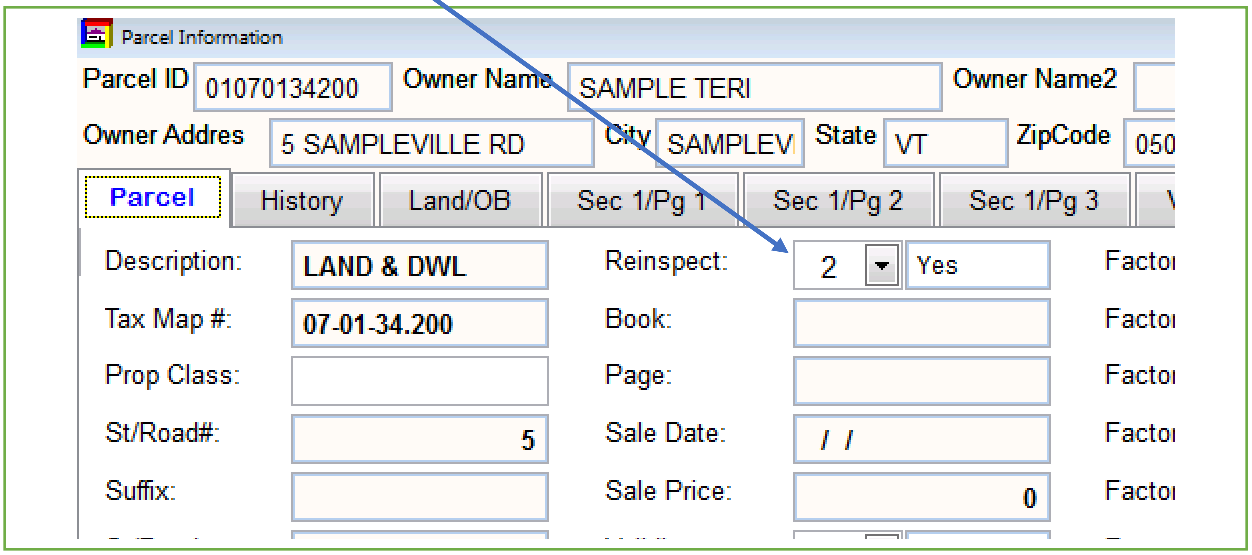
<u>Other Ideas</u>

- Grand list is printed in a binder format for view with separation for each letter of the alphabet (Benson / Orwell)

- Help desk notebook with tabs to find easily

NOTES:

Microsolve (MSOL) Re-inspect Report



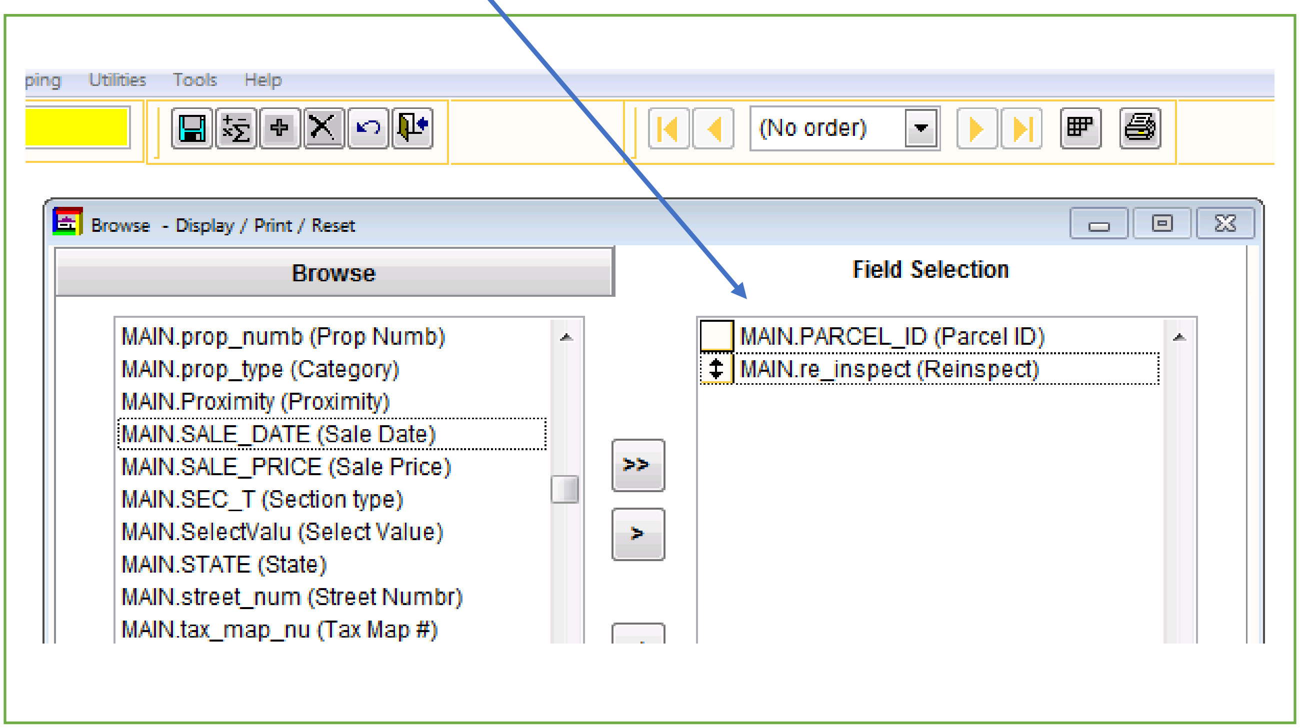
Open MSOL

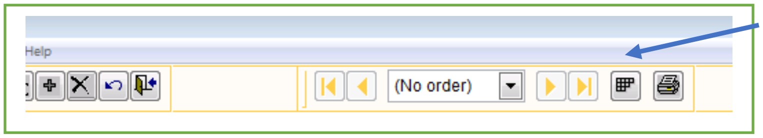
- Click Data
- Click Browse
- Display/Print/Reset

At Browse Box Click "Field Selection" Tab

Choose fields on left by location and double clicking to see them in box on right

- Main.Parcel_ID (Parcel Id)
- Main.re_Inspect (Reinspect)

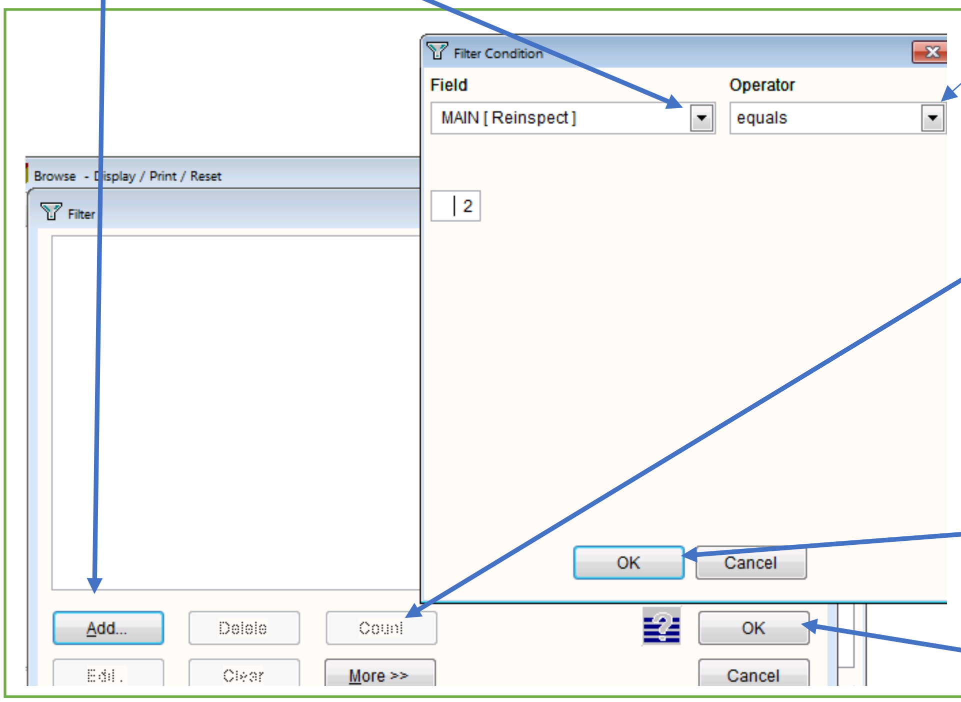




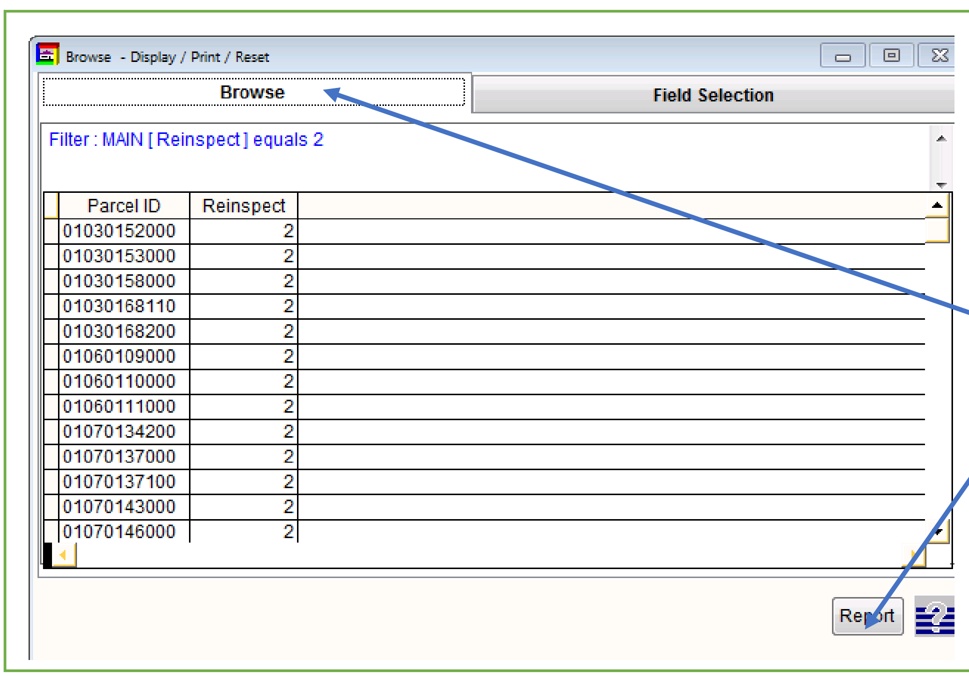
Click Filter box on top tool bar to left of printer icon

Click Add to bring up filter condition box

- Click down arrow to choose Main.(Reinspect) in field box

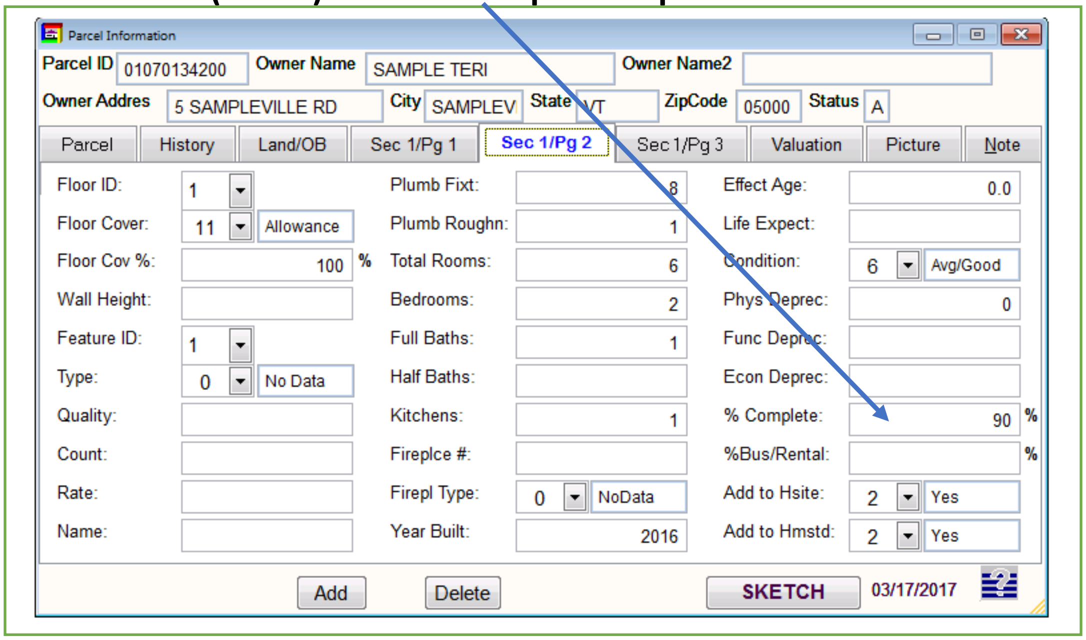


- Click down arrow to choose equals in Operator box enter 2 in small box instead of 0
- Click Count (top right corner will show how many records are contained in the request)
- Click OK
- Click OK again on filter box



- Click "Browse" tab to see results
- Choose Report to print if this meets your needs

Microsolve (MSOL) Percent Complete Report



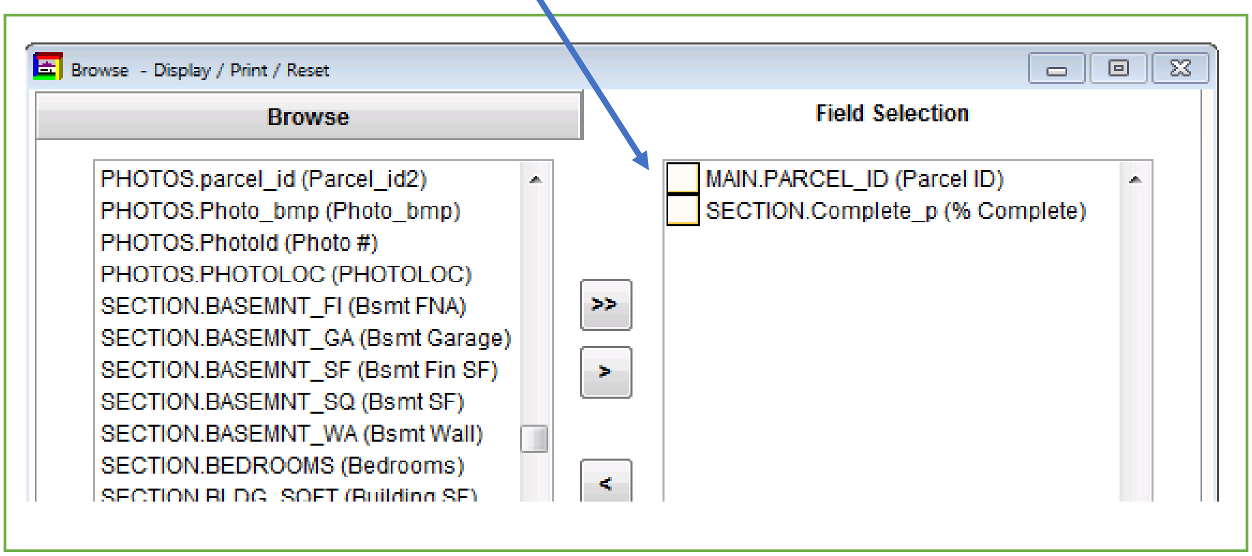
Open MSOL

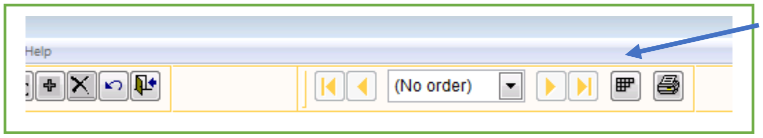
- Click Data
- Chick Browse
- Display/Print/Reset

At Browse Box Click “Field Selection” Tab

Choose fields on left by location and double clicking to see them in box on right

- Main.Parcel_ID (Parcel Id)
- Main.Complete_p (% Complete)

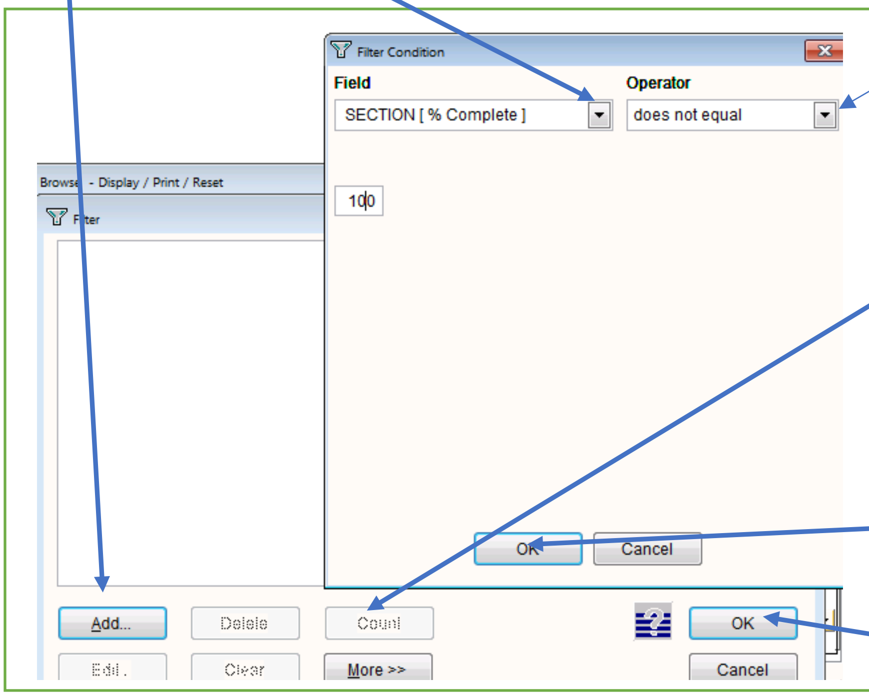




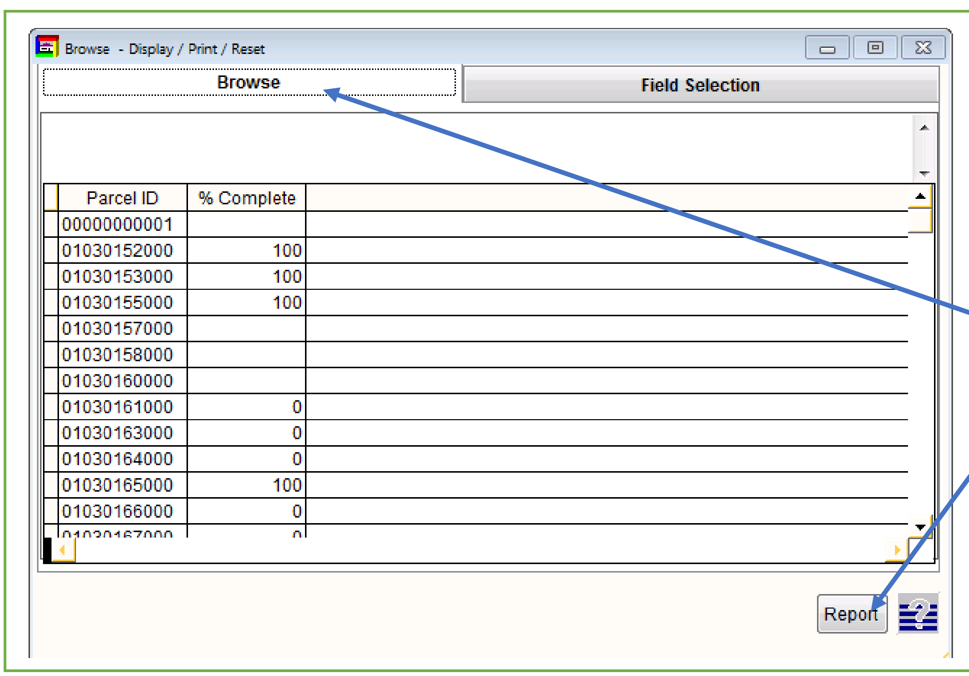
Click Filter box on top tool bar to left of printer icon

Click Add to bring up filter condition box

- Click down arrow to choose SECTION[% Complete] in field box



- Click down arrow to choose equals in Operator box enter 100 in small box instead of 0
- Click Count (top right corner will show how many records are contained in the request)
- Click OK
- Click OK again on filter box



- Click “Browse” tab to see results
- Choose Report to print if this meets your needs

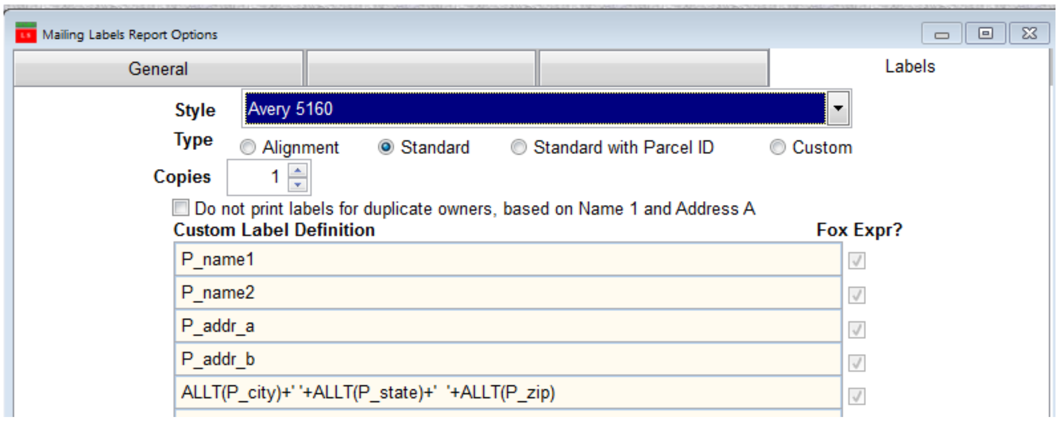
O. Reports Menu

A. Mailing/Lister Card Labels

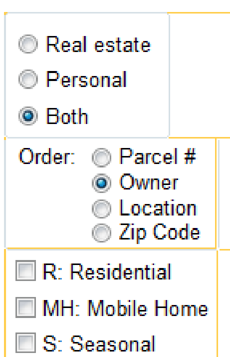
Choose **Style** [Avery 5160]

For **Type** use Standard

You may click on [☐ Do Not Print labels for duplicate owners, based on Name 1 and Address A]



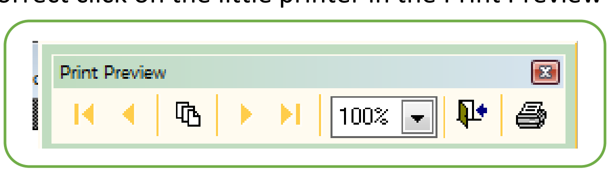
- Click on [General] tab and you may choose to print labels based on specific information, click on the appropriate box(es).



- **Always [Preview] before printing**.
  - NEMRC message: Is this first page a full sheet? Click on [Yes] or [No].
  - Adjust Top Margin? Click on [Yes] or [No].
    - If you choose [Yes] Margin Adjustment popup will let you enter a number to adjust margin.
    - [**Preview**] will show you what the labels will look like.

You get a Popup [Would you like a zip code report for bulk mailing? [Yes] [No]] choose one.

If the labels look correct click on the little printer in the Print Preview box



ALL GRIEVANCES MUST BE IN WRITING. This form is provided for your convenience.
Return the completed form to the Assessor's/Lister's Office, __________________, VT. ____

TOWN OF _______________
GRIEVANCE APPEAL TO ASSESSOR/LISTER

Date ___________________ Telephone Number(s) ____________________________________

Property Owner(s): ____

Business Name (If different): ____

Type/Use of Property: ____

Location: ____

Account/Parcel Number(s): ____

Assessed Value: __________________ Owners Estimate of Value: ________________________

Owners' Reasons for grievance: ____

____

____

____

____

What do you feel this could sell for on the market today? ______________________

____

____
Signature(s) of Owner(s) or Representative

NOTE: *If you are representing the owner, you must include a letter of representation signed by the owner with your appeal.*

BUYER SALES VERIFICATION FORM

Buyer:____ **Purchased From:**____________________________

Sale Price: $___________ **Sale Date:**____________ **Property Type:**______________________________

Location: ____________________________________ **Parcel or SPAN#:**____________________________

BUYER OR BUYER'S REPRESENTATIVE TO FILL OUT THE INFORMATION BELOW

If no broker, how did you know the property was for sale?

____

Broker Name: _____________________________

Broker Phone#: ___________________________

Buyer Phone#:______________________________

____

Questions

	YES	NO
1. Was the sale between family members or close friends? If YES, please state the relationship: ______________________________________	____	____
2. Did the sale involve a trade, like-kind exchange, debt payment, etc.? If YES, please explain:____	____	____
3. Was the property rented, leased or occupied by you *before* the sale?	____	____
4. Is the property abutting a parcel that was already owned by you?	____	____
5. Was this a distress sale (divorce, estate, court decree, financial hardship)?	____	____
6. Were any back taxes, liens, etc. included in the sale price? If YES, please explain:____	____	____
7. Were any substantial changes made to the property just before the sale? If YES, please explain:____	____	____
8. Did the seller provide any mortgage financing? If so, amount: ______________	____	____
9. Was an appraisal done on the property for this purchase? If YES, appraised value:____	____	____
10. Do you feel that the sale price reflects a fair market value? If NO, please explain:____	____	____
11. Was any personal property included in the sale price? If YES, what?:______________________________ Estimated value?:____________	____	____

12. How many properties did you look at before selecting this one? ____________

13. Additional Comments:____

____

DATE: ____________________ **VERIFIED BY (Signature):**_____________________________________

Thank you for assisting us by filling out this form!

SELLER SALES VERIFICATION FORM

Seller:____ **Buyer:**____

Sale Price: $____________ **Sale Date:**_____________ **Property Type:**_______________________________

Location: _____________________________________ **Parcel or SPAN#:**_____________________________

SELLER OR SELLER'S REPRESENTATIVE TO FILL OUT THE INFORMATION BELOW

If no broker, how did you market the property?

____

Broker Name: _______________________________
Broker Phone#: _____________________________

Seller Phone#:_______________________________
____

Questions

	YES	NO
1. Was the sale between family members or close friends?	____	____
If YES, please state the relationship: ______________________________________		
2. Did the sale involve a trade, like-kind exchange, debt payment, etc.?	____	____
If YES, please explain:____		
3. Was the property rented, leased or occupied by the buyer *before* the sale?	____	____
4. Is the property abutting a parcel that was already owned by the buyer?	____	____
5. Was this a distress sale (divorce, estate, court decree, financial hardship)?	____	____
6. Were any back taxes, liens, etc. included in the sale price?	____	____
If YES, please explain:____		
7. Were any substantial changes made to the property just before the sale?	____	____
If YES, please explain:____		
8. Did you provide any mortgage financing? If so, amount: _______________	____	____
9. Was an appraisal done on the property for this purchase?	____	____
If YES, appraised value:____		
10. Do you feel that the sale price reflects a fair market value?	____	____
If NO, please explain:____		
11. Was any personal property included in the sale price?	____	____
If YES, what?:______________________________ Estimated value?:____________		
12. Was the final sales price a result of negotiating the price?	_____	_____

13. Additional Comments:____

DATE: ____________________ **VERIFIED BY (Signature):**_____________________________________

Thank you for assisting us by filling out this form!

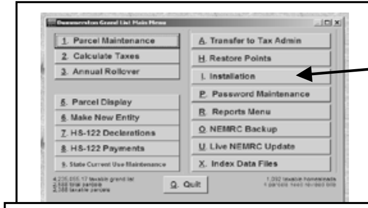
Backup Log

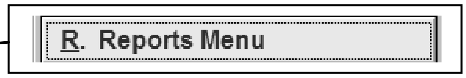
Date	-NEMRC	CAMA	Who worked / who did BU
1/24/2018	yes	no	Louise F-B & Deb Leahy / LF - B

3. Exporting Data from NEMRC.

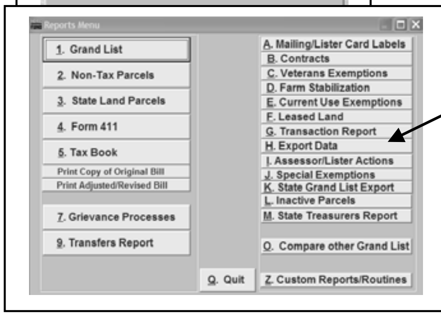
This function can be used to pull various reports from your grand list data in limited fields, allowing you to export to excel. This is also the process for a request for your grand list exports for the public.

a How to Export Data

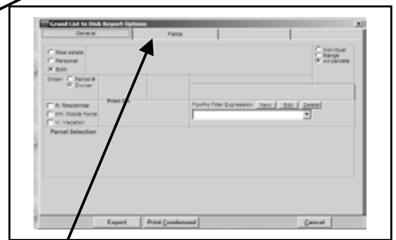




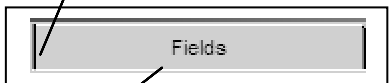
- ◊ NEMRC – Main Menu
- ◊ Choose R for Reports Menu
    - o NEMRC – Reports Menu



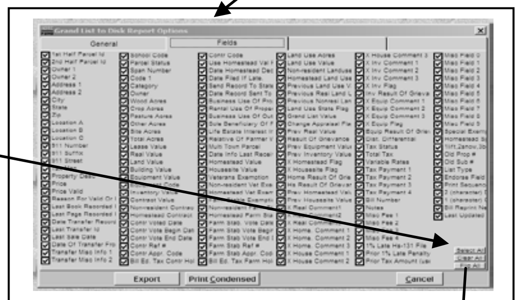
- ◊ Choose H for Export Data



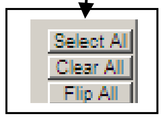
- ◊ Click on FIELDS Tab at the top



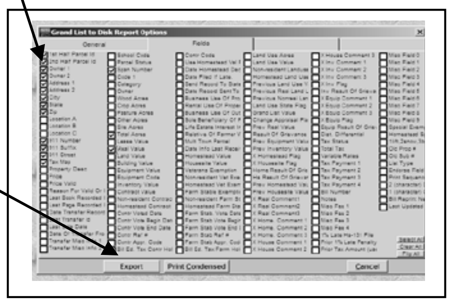
    - ▪ (If you want all fields- i.e. the person asks for an entire grand list- do not do the next two steps and the program will default to all fields in the grand list. If the person wanted only certain information, then follow the next two steps)



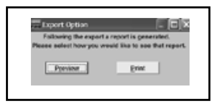
- ◊ On the bottom right hand corner of the screen- click CLEAR ALL button
- ◊ Choose fields you want by clicking the white box to the left of each field you want
    - ▪ (For address labels: choose Owner Name, Address, City, State, & Zip)

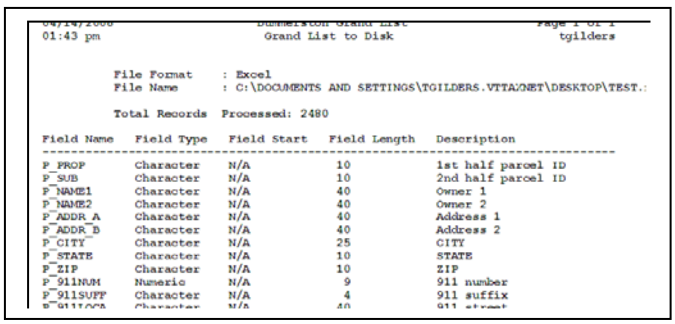


- ◊ Click EXPORT



- ◊ Preview or Print the report (shows the fields you chose and the length of each field – this will show what order the information is in and can be included with the DISC or CD created)





01:43 pm Grand List to Disk tgilders

File Format : Excel
File Name : C:\DOCUMENTS AND SETTINGS\TGILDERS.VTTAXNET\DESKTOP\TEST.:

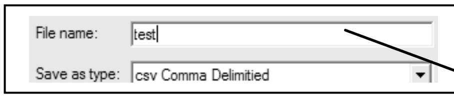
Total Records Processed: 2480

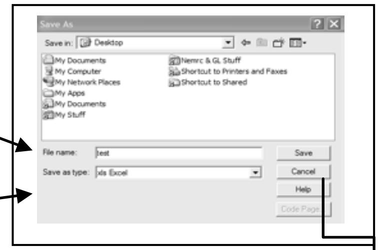
Field Name	Field Type	Field Start	Field Length	Description
P_PROP	Character	N/A	10	1st half parcel ID
P_SUB	Character	N/A	10	2nd half parcel ID
P_NAME1	Character	N/A	40	Owner 1
P_NAME2	Character	N/A	40	Owner 2
P_ADDR_A	Character	N/A	40	Address 1
P_ADDR_B	Character	N/A	40	Address 2
P_CITY	Character	N/A	25	CITY
P_STATE	Character	N/A	10	STATE
P_ZIP	Character	N/A	10	ZIP
P_911NUM	Numeric	N/A	9	911 number
P_911SUFF	Character	N/A	4	911 suffix

◊ The following message pops up:
  - "If you want to export a grand list to diskette, please insert the diskette at this time. Then click OK".
  - Click even when you are not using a diskette.

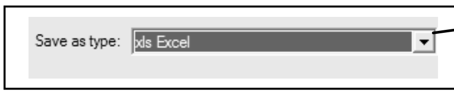
◊ SAVE AS box will pop up
  - A window should appear with "Save as:" you could go to 3 ½ Floppy or CD – (click down arrow to the right to find the location you want to put the information) (or save to your desktop and copy or write to CD/CD"s)

◊ Name file under FILE NAME- type in the name you want.

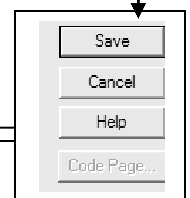




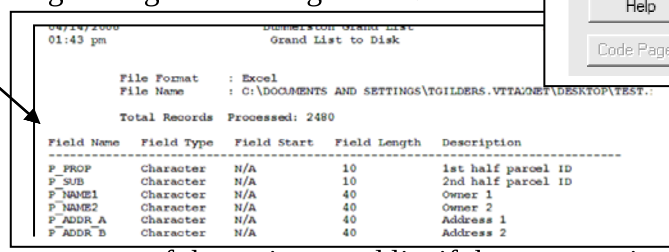
◊ Click down arrow next to "SAVE AS TYPE"



◊ Choose "Excel" if that is the format the person requested.
  - The program will default to Comma Delimited.



◊ Then click SAVE, after the disk stops clicking and light on drive goes out.
◊ Print report to go with the DISC/CD.
◊ Click CANCEL and take disk out.



01:43 pm Grand List to Disk

File Format : Excel
File Name : C:\DOCUMENTS AND SETTINGS\TGILDERS.VTTA\DESKTOP\TEST.

Total Records Processed: 2480

Field Name	Field Type	Field Start	Field Length	Description
P_PROP	Character	N/A	10	1st half parcel ID
P_SUB	Character	N/A	10	2nd half parcel ID
P_NAME1	Character	N/A	40	Owner 1
P_NAME2	Character	N/A	40	Owner 2
P_ADDR_A	Character	N/A	40	Address 1
P_ADDR_B	Character	N/A	40	Address 2

  - This is also how you can give someone a copy of the entire grand list if they request it; the only difference I would do is; do not clear all on step 5. If you do not clear all, they will get all the grand list data; or they can tell you which fields they want. Also, under Save as Type- I would choose comma delimited unless they tell you what format they want. Always give the public the last billed grand list (**never** any <u>working grand list</u> unless it is only mailing address information).