



NCVTS
North Carolina Vehicle Tax System

Training Guide

▶ Your Guide to *Understanding* NCVTS

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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.



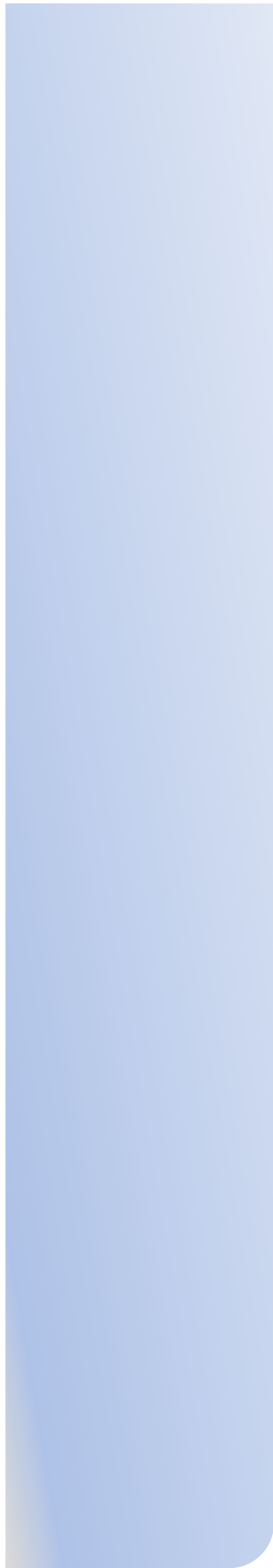
Set the Stage. Provides a realistic scenario for the exercise that follows.



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.



MODULE 1: FOUNDATION



Chapter 1: NCVTS Overview

The NCVTS Overview chapter establishes a solid foundation for learning the North Carolina Vehicle Tax System (NCVTS). The chapter presents the business needs and 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 Division of Motor Vehicles (DMV) 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 values, verifying situs addresses, applying tax districts, and calculating vehicle taxes.

House Bill 1779, ratified in 2005, and signed into law under Session Law 2005-294, modified the collection process for vehicle property taxes and registration fees on registered motor vehicles in the State. The law mandates combining the payment of taxes and registration fees at the time of registration and became effective on July 1, 2013. Benefits of the changed business process 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 vehicle property tax collection timeframe for the counties

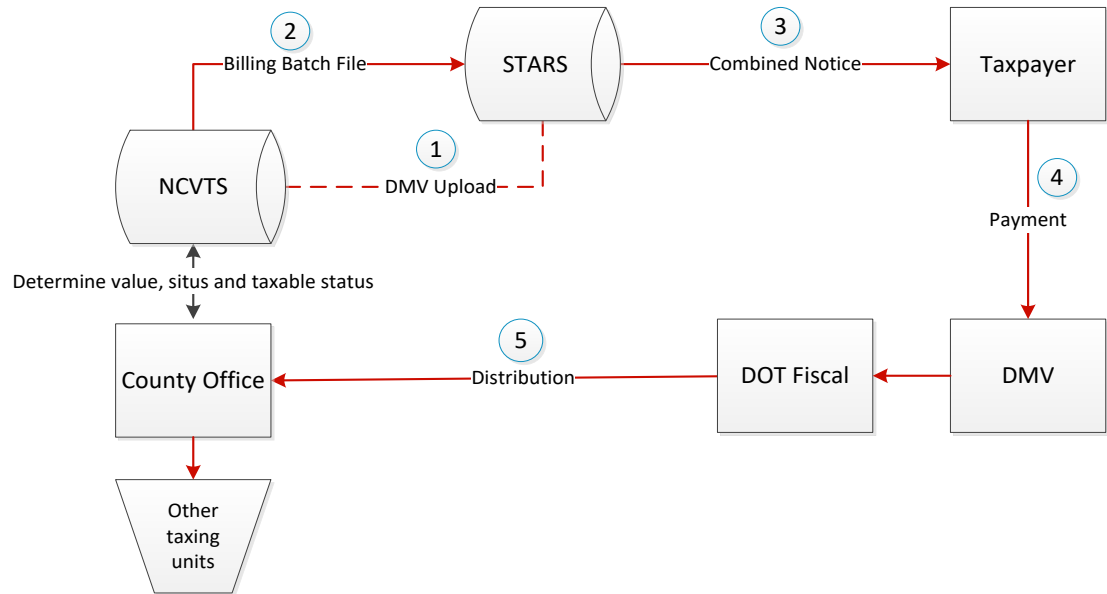


The NCVTS listserve provides a forum for questions and up to date information on the vehicle tax system. Subscribe using the following link:

<https://www.sog.unc.edu/resources/listserve/north-carolina-vehicle-tax-system-ncvts>.

Data Flows

Business Flow



Each month DMV 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. The North Carolina Department of Transportation (DOT) Fiscal Section will distribute local tax revenue to the counties, who will in turn distribute to the other taxing units.



STARS:

DMV uses STARS to track vehicle registration and renewals in North Carolina. Information is passed between STARS and NCVTS during the course of renewals, billing and collections.



Situs Address:

The physical street address where a vehicle is more or less permanently located.



DMV Upload:

Each month, DMV sends the full list of vehicle records up for renewal to NCVTS. This monthly process is called the DMV Upload.

NCVTS Flow

Assessment

Before data is received in the 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. If no match is found, a median value is used. Once data is received in NCVTS, validations will occur to determine if abstracts are ready for billing. If an abstract is not ready for billing, a representative 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 abstracts are not worked during the month, they will be processed with default data. For example, taxes will be calculated on the NCDOR median value for abstracts in the NO_VALUE queue.

Each month the batch billing process will create bills for abstracts with a status of RFB (Ready for Bill) and send to STARS.



Abstract:

Each month, DMV 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 the county are automatically marked with a status of RFB (Ready for Bill).

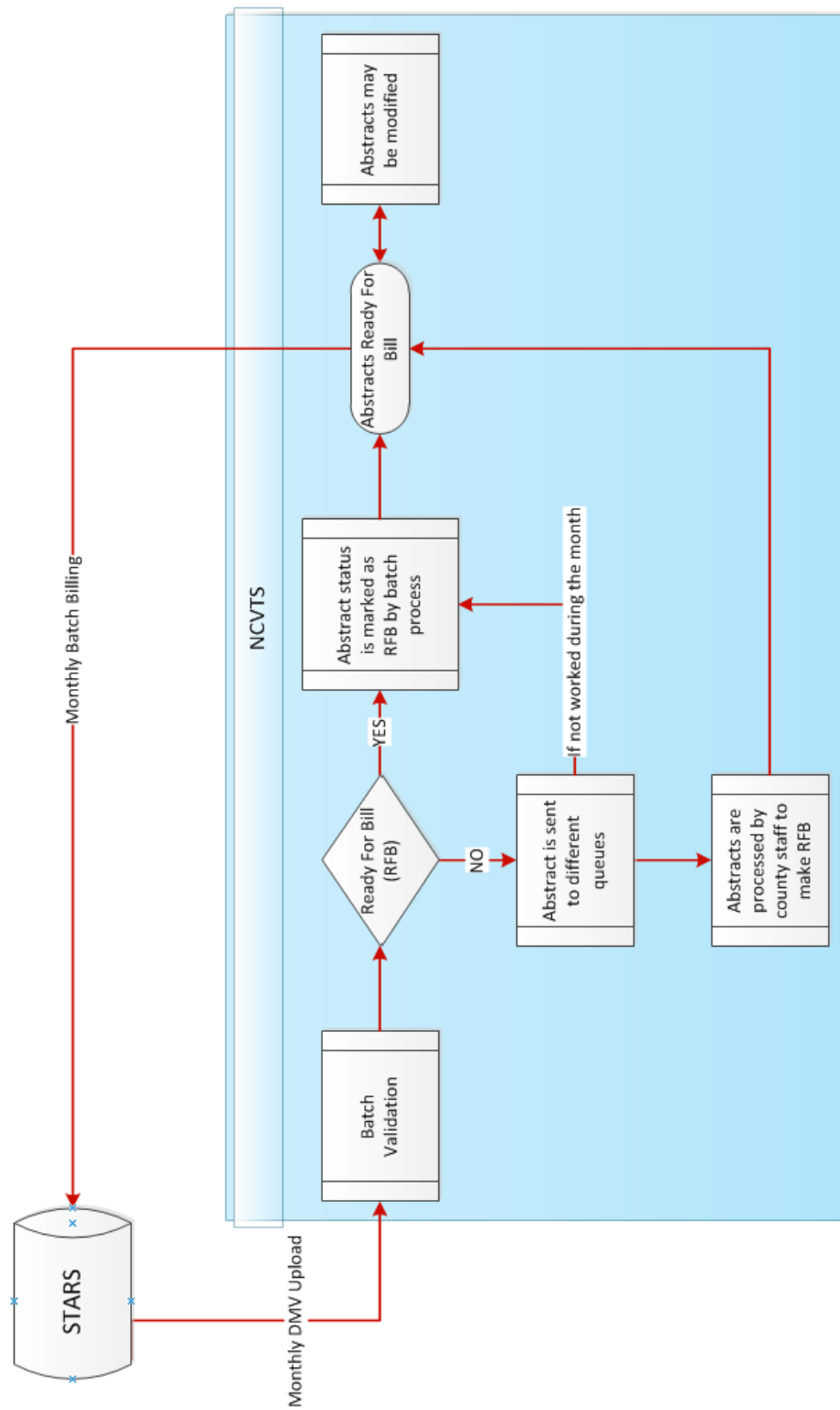
NCVTS Flow (continued)



Valuation

Process:

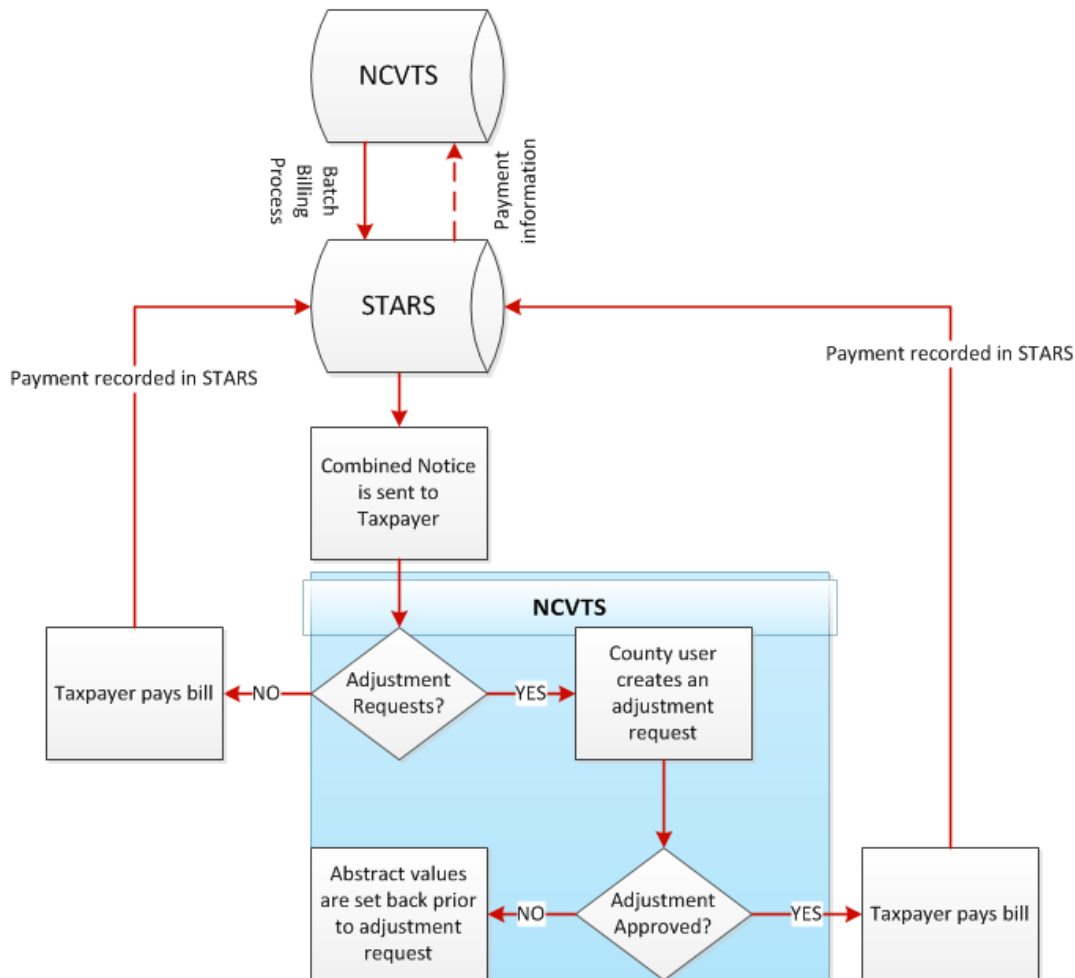
When the DMV Upload occurs, each vehicle is matched with a value based on the information from TEC Data Systems.



NCVTS Flow (continued)

Billing

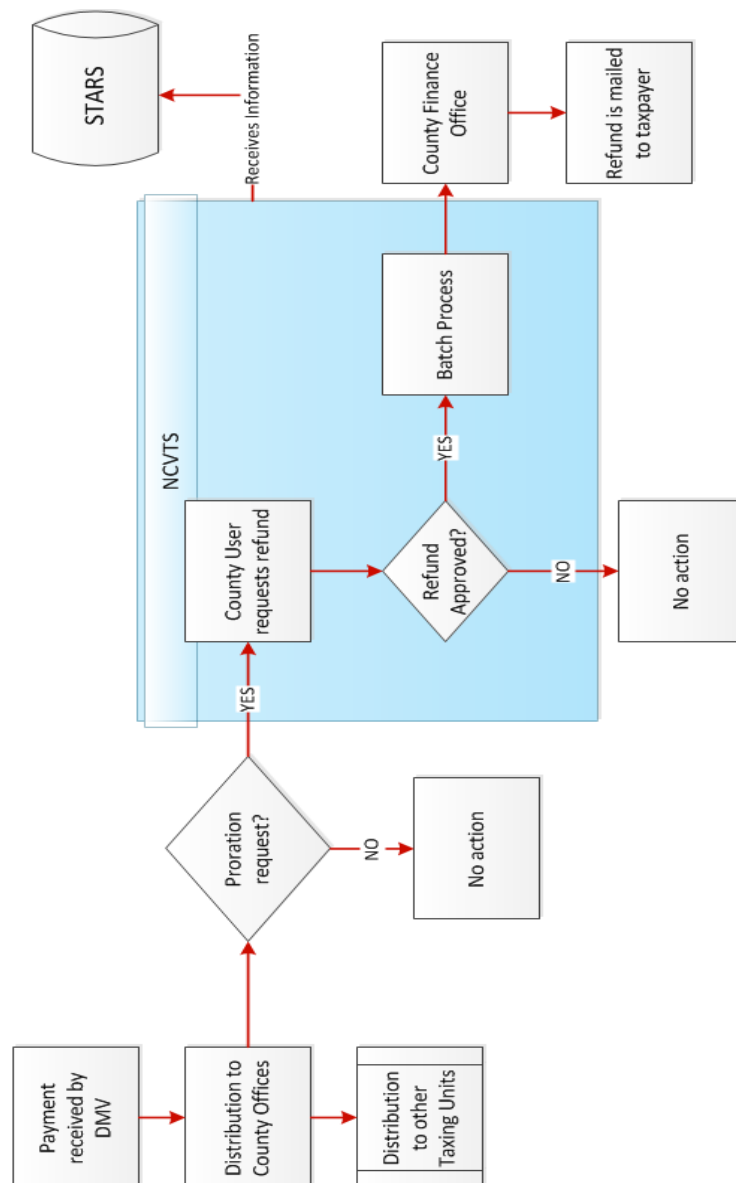
The tax bill and the vehicle registration will be combined into one notice called the invitation to renew and STARS initiates the printing and mailing process. When a taxpayer pays their bill, the payment is recorded in STARS and the information is sent to NCVTS. A taxpayer may request an adjustment 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 a License Plate Agency (LPA) office. All payments are received by DMV and will be distributed to the counties in a batch process by DOT Fiscal. 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.





Chapter 2: Getting Started

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

Objectives

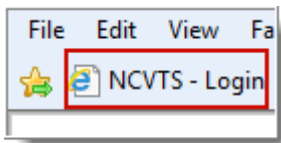
- ▶ Access NCVTS
- ▶ Understand a web page and functionality
- ▶ Understand user permissions
- ▶ Navigate NCVTS
- ▶ Search for records in NCVTS

Accessing NCVTS

The North Carolina Identity Service (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, you must obtain an NCID by request through a delegated administrator for your county.

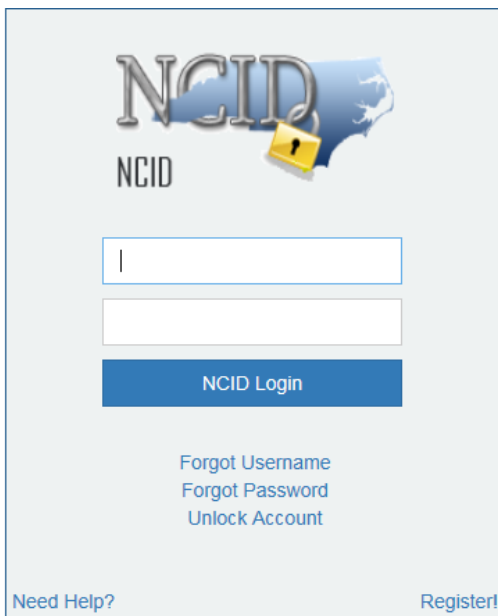
Exercise Steps

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



The NCID login page will display.

2. Enter your assigned **User ID** and **Password**, then click the **NCID Login** button.

A screenshot of the NCID login page. At the top, the text 'NCID' is displayed in a large, stylized font, with a blue map of North Carolina and a yellow padlock icon to its right. Below this, the text 'NCID' appears again in a smaller font. There are two white input fields for 'User ID' and 'Password'. Below the input fields is a blue button labeled 'NCID Login'. Underneath the button are three links: 'Forgot Username', 'Forgot Password', and 'Unlock Account'. At the bottom left, there is a link 'Need Help?' and at the bottom right, a link 'Register!'.

The NCVTS Main Menu page will display.

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

i 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.

! NCVTS only has full functionality with Chrome and Microsoft Edge.

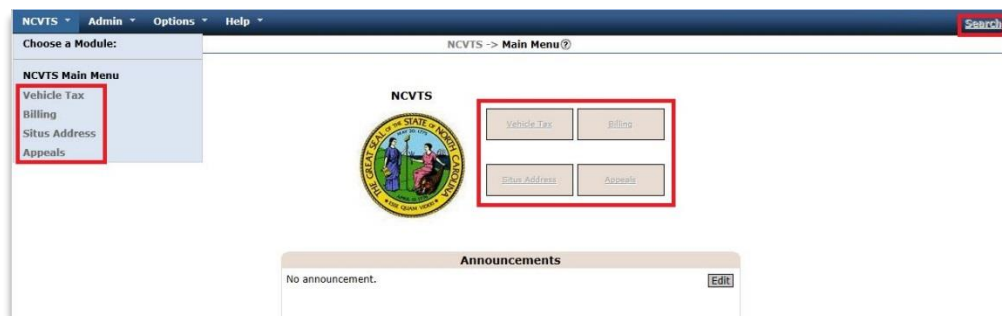
Navigating NCVTS

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. County Administrator role and user management are discussed in Module 4. For most users, to begin working in NCVTS, you will need to navigate to a search page.

There are three 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 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.

i The Announcements section is maintained by the North Carolina Department of Revenue (DOR). This section will provide important information about NCVTS.

Navigating NCVTS (continued)

Exercise Steps

1. Click the **Search** link.



The Abstract Search page displays.

A screenshot of the NCVTS Abstract Search page. The page has a dark blue header with the text "NCVTS -> Vehicle Tax -> Search" and a "Search" button in the top right corner. Below the header are several tabs: "Abstract", "Situs Address", "Adjustment", "Bill", and "Appeal". The "Abstract" tab is selected. The page contains a search form with the following fields: "Abstract #:", "Tax Year:", "Year For:" (set to 2018), "Status:", "Exemption:", "Owner Information:" (Last, First, Middle, Sfx, Additional, Business/Government/Others Name, Business Type), "Lessee:" (Last, First, Middle, Sfx, Additional, Business/Government/Others Name, Business Type), "Registration:" (VIN, Plate #, Title #), "Vehicle:" (Make, Model, Model Year, Body Style), "Situs Address:" (St #, Unit #, P#, St Name, St Type, Sfx, City, State, Zip, Parity), "In Care Of:", "Mailing Address:" (Address 1, Address 2, Address 3, City, State, Zip), "Flag:" (Adm: Confidentiality, Non County, Under Appeal, Under Research), and "Billing Criteria:" (Billing Date From, Billing Date To).

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

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 Browser Button (Do Not Use) - When navigating through NCVTS, 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 –

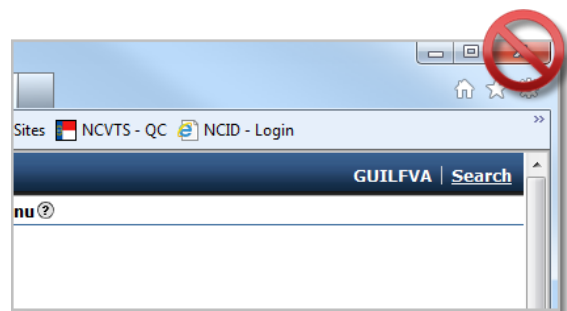
[NCVTS](#) -> [Vehicle Tax](#) -> [Search](#) -> [Vehicle Tax Search Results](#)

A navigation aid

that allows you to keep track of your location within the system. Breadcrumbs are also used as a back feature in NCVTS.

Close Browser Button (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 option to exit the NCVTS application, as this correctly ends your session. The Logout option is located under Options on the Main Menu page.



Searching for Records in NCVTS

When searching for vehicle records there are two basic search processes:

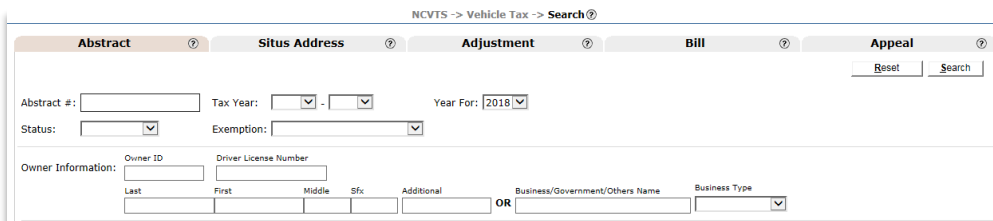
- ▶ Quick search
- ▶ Advanced search

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 for the year selected.



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

- ▶ Abstract
- ▶ Situs Address
- ▶ Adjustment
- ▶ Bill
- ▶ Appeal



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

i The Year For selection is for the tax year the abstract was billed. The valuation year is based off of the date of renewal and may be different.

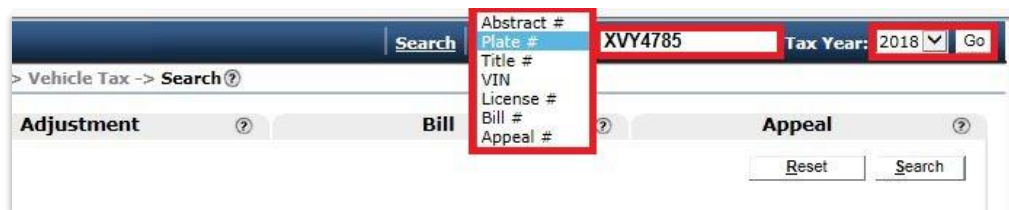
Using the Quick Search

A Quick Search can be performed by entering criteria into the Quick Search location on the main menu navigation bar. You can perform a quick search based on multiple criteria, including:

- ▶ Abstract
- ▶ Plate
- ▶ Title
- ▶ VIN
- ▶ License
- ▶ Bill
- ▶ Appeal

Exercise Steps

1. Select the **Plate #** option from the Quick Search drop-down list, and then type the **Plate #** in the field.
2. Select the tax year you wish to search for.
3. Click **Go**.



The screenshot shows a web interface for a vehicle tax search. At the top, there is a dark blue navigation bar with a 'Search' button. Below this, a search form is displayed. The form has a dropdown menu on the left with 'Plate #' selected and highlighted in blue. To the right of the dropdown is a text input field containing 'XVY4785'. Further right is a 'Tax Year' dropdown menu set to '2018', followed by a 'Go' button. Below the search form, there are three tabs: 'Adjustment', 'Bill', and 'Appeal'. The 'Bill' tab is currently active. At the bottom right of the form, there are 'Reset' and 'Search' buttons.

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

Using the Advanced Search

There are five 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.


A screenshot of the 'Abstract' search tab in a web application. The form includes fields for 'Abstract #', 'Tax Year', 'Year For', 'Status', and 'Exemption'. It has sections for 'Owner Information' (Last, First, Middle, Sfx, Additional, Business/Government/Others Name, Business Type) and 'Lessee' (Last, First, Middle, Sfx, Additional, Business/Government/Others Name, Business Type). There are also fields for 'Registration' (VIN, Plate #, Title #), 'Vehicle' (Make, Model, Model Year, Body Style), 'Situs Address' (St #, Unit #, Pk, St Name, St Type, Sfx, City, State, Zip, Parity), 'Mailing Address' (Address 1, Address 2, Address 3, City, State, Zip), 'Flag' (Adm. Confidentiality, Non County, Under Appeal, Under Research), and 'Billing Criteria' (Billing Date From, Billing Date To). A 'Search' button is located at the top right of the form.

Situs Address Search Tab

Users can search for abstracts by providing situs address details.

A screenshot of the 'Situs Address' search tab in a web application. The form includes fields for 'County Address ID', 'Street #', 'Prefix', 'Street Name', 'Street Type', 'Suffix', 'Unit #', and 'City'. There is also a 'Detail Info' section with fields for 'Parity', 'Record Type', and 'Parcel #'. A 'Search' button is located at the top right of the form.

 To narrow your search results, make a selection from the Status drop-down menu.

 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.

Adjustment Search Tab

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

The screenshot shows the 'Adjustment' search tab. It includes fields for 'Adjustment Info' (Adjustment #, Adjustment Status, Processed By, Date Processed) and 'Adjustment Detail Info' (Entered By, Date Entered). There are 'Reset' and 'Search' buttons at the top right.

Bill Search Tab

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

The screenshot shows the 'Bill' search tab. It includes fields for 'Bill #' (Tax Year, Year For, Status), 'Owner Information' (Owner ID, Drivers License Number, Last, First, Middle, Sfx, Business/Government/Others Name, Business Type), 'Registration' (VIN, Plate #, Title #, Make, Model, Model Year, Body Style), 'Vehicle' (St #, Unit #, Pfx, St Name, St Type, Sfx), 'Situs Address' (City, State, Zip, Parity), 'Mailing Address' (In Care Of, Address 1, 2, 3, City, State, Zip), 'Flag' (Bad Debt, Full Release, Int Refund Pending, Plate Turn In), and 'Billing Criteria' (From, To). There are 'Reset' and 'Search' buttons at the top right.

Appeal Search Tab

Users can search for pre-existing appeals based on specified criteria.

The screenshot shows the 'Appeal' search tab. It includes fields for 'Abstract #' (Tax Year), 'Appeal ID', 'Appeal Status', 'Appeal Decision', 'Appraiser', 'Appointment Date' (From, To), 'VIN#' (Year For), 'Appeal Open Date' (From, To), 'Appeal Level', 'Appeal Case #', 'Created By', 'Appeal Reason', 'Owner Name' (Last, First, Middle, Sfx, Business Name), and 'Situs Address' (St #, Unit #, Pfx, St Name, St Type, Sfx, City, State, Zip, Parity). There are 'Reset' and 'Search' buttons at the top right.



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.

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.

i 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



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)

2. On the Search page, enter or select the following:

Status	RFB (Ready for Bill)
Last (Owner Information)	JONES

3. 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.

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

Abstract Status	Abstract #	Tax District	Final Value (\$)	DOR Value (\$)	Value (\$)	Make	Model	Model Year	Body Style	Vin #
Ready for billing	0007711208-2018-2018	WAKE COUNTY, RALEIGH	4,130	4,130	4,130	DODG	RAM TRUCK	2004	Truck	1D7HU18D14S
Ready for billing	0038485515-2018-2018	WAKE COUNTY, KNIGHTDALE	9,260	9,260	9,260	TOYT	CAMRY BASE/SE/LE/XLE	2012	4 Door Sedan	4T1BF1FK2CU1
Ready for billing	0043785526-2018-2018	WAKE COUNTY, RALEIGH	12,460	12,460	12,460	CHEV	EQUINOX LT	2015	Multipurpose Vehicle	2GNALBEK3F61

The Maintain Vehicle Abstract page displays.

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



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

i 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)

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

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

Vehicle Summary										
Export Value Lookup Notes Add to Abstract Service Cart										
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17										
Abstract Status	Abstract #	Tax District	Final Value (\$)	DOR Value (\$)	Value (\$)	Make	Model	Model Year	Body Style	Vin #
Ready for billing	0007711208-2018-2018	WAKE COUNTY, RALEIGH	4,130	4,130	4,130	DODG	RAM TRUCK	2004	Truck	1D7HU18D14SS15304
Ready for billing	0038485515-2018-2018	WAKE COUNTY, KNIGHTDALE	9,260	9,260	9,260	TOYT	CAMRY BASE/SE/LE/XLE	2012	4 Door Sedan	4T1BF1FK2CU152070
Ready for billing	0043785526-2018-2018	WAKE COUNTY, RALEIGH	12,460	12,460	12,460	CHEV	EQUINOX LT	2015	Multipurpose Vehicle	2GNALBEK3F6185332

The VIN History window displays.

VIN History	
History For VIN 2GNALBEK3F6185332	
Fields	2018
Abstract #	0043785526
Plate #	PCV1955
Owner 1	
Owner 2	
Model Year	2015
Make	CHEV
Model	EQUINOX LT
Body Style	MP
Truck Type	
Title #	779366180710212
Title Date	03/12/2018
Registration Date	12/01/2018
Expiration Date	11/30/2019
Plate Type	RENEWAL
Original DOR Value	\$12,460
Final Value	\$12,460
Listing Type	
Bill Date	
Tax Year	2018
Year For	2018
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.



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

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.

Exercise Steps

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

Vehicle Summary														
Export Value Lookup Notes Add to Abstract Service Cart														
1 2 3														
<input type="checkbox"/>	Abstract Status	Abstract #	Tax District	Final Value (\$)	TEC Value (\$)	Value (\$)	Make	Model	Model Year	Body Style	Vin #	Weight (lbs.)	Plate Ctry	Notes/ Corr
<input checked="" type="checkbox"/>	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	
<input checked="" type="checkbox"/>	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.

Vehicle Summary														
Export Value Lookup Notes Add to Abstract Service Cart														
1 2 3														
<input type="checkbox"/>	Abstract Status	Abstract #	Tax District	Final Value (\$)	TEC Value (\$)	Value (\$)	Make	Model	Model Year	Body Style	Vin #	Weight (lbs.)	Plate Ctry	Notes/ Corr
<input checked="" type="checkbox"/>	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	
<input checked="" type="checkbox"/>	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.

Letters/Correspondence: Export Headers
Cancel Export

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

Do you want to open or save **export_20121221114042.csv** (2.55 KB) from **vtsdemo.iis-rtpl.local?**
Open Save Cancel

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 Year	Body Style	Vin #	Weight (lt	Plate Ctg	Primary O	Secondary	Reg Use Code
000959905	6070	6070	6070	MAZD		5	2006 4 Door	SeiJM1CR293	0	PLACPVA	ALSTON-S	SMITH, KE	REGCPASS
000879888	14930	14930	14930	LEXS	IS250	AWT	2006 4 Door	SeiJTHCK262	0	PLACPVA	ARRINGTC	SMITH, NA	REGCPASS
000238275	13760	13760	13760	TOYT	CAMRY	BA	2011 4 Door	Sei4T1BF3EK	0	PLACPVA	BAILEY-SM	SMITH, TE	REGCPASS
00148334C	5330	5330	5330	CHEV	K15		2002 Station	W 1GNFK16Z	0	PLACPVA	BELGADO-S	SMITH, RC	REGCPASS
000227585	6770	6770	6770	KIA	RIO	BASE/	2009 4 Door	SeiKNADE22E	0	PLACPVA	BOWSER, S	SMITH, ST	REGCPASS
000235027	7430	7430	7430	NISS	VERSA	S/S	2007 4 Door	Sei3N1BC13E	0	PLACPVA	BRELAND,	CAROL EL	REGCPASS
000938981	11970	11970	11970	CHEV			2010 4 Door	Sei1G1ZA5E0	0	PLACPVA	BROWN, F	SMITH, DA	REGCPASS
001770282	1000	0	1000	COX			1983 Trailer	1C2BF11S	0	PLACPVL	BURLEY, S	SMITH, JO	REGCTRLR
000970751	4830	4830	4830	HOND	CR-V		2002 Station	W JHLRD774	0	PLACPVA	CHARLES,	SMITH, KII	REGCPASS
001487858	20760	20760	20760	AUDI			2011 2 Door	SeiWAUKJAF	0	PLACPVA	CLINE, LES	SMITH, BR	REGCPASS
000998555	13920	13920	13920	TOYT	4	RUNNER	2006 Multipurp	JTEZU14RJ	0	PLACPVA	COLTRANE,	ERIN MA	REGCPASS
000229941	5150	5150	5150	TOYT	CAMRY	U.	2003 4 Door	Sei4T1BE32K	0	PLACPVA	DAVIS, PAME	LA YVE	REGCPASS
001010175	13760	13760	13760	TOYT	CAMRY	BA	2011 4 Door	Sei4T1BF3EK	0	PLACPVA	DESANTIS	SMITH, VA	REGCPASS
001484883	13550	13550	13550	CHEV	IMPALA	LT	2011 4 Door	Sei2G1WG5E1	0	PLACPVA	DIGGS, TEI	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	Sei1G8JD54R	0	PLACPVA	FERGUSO	DIXON, JC	REGCPASS
000965245	10500	10500	10500	TOYT	HIGHLAN		2005 Multipurp	JTEGP21A	0	PLACPVA	FISCHER, F	SMITH, JEI	REGCPASS
001483872	9110	9110	9110	HOND	CIVIC	U.S.	2006 4 Door	Sei1HGFA158	0	PLACPVA	FISHER, G	SMITH, CY	REGCPASS
001485786	4010	4010	4010	TOYT	CAMRY	U.	2002 4 Door	Sei4T1BE32K	0	PLACPVA	GRACEY, C	SMITH, ST	REGCPASS
00106877C	18177	0	18177	FORD			2013 4 Door	Sei1FADP3N	0	PLACPVA	HALL, ERN	SMITH, VII	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, CLARI	SSHE THE	REGCPASS

NCDOR letter templates are located on the NCVTS portal.

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.



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

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 screenshot shows the 'Property Info (F3)' tab selected. At the top, there are navigation tabs for Abstract Info (F2), Property Info (F3), Adjustments (F4), Change History (F5), and Notes (F6). Below these is a table with columns: Type, Description, Exemption, Listing Flag, Appraised Value, and Total Assessed Value. The main content area is divided into three sub-tabs: Vehicle Info, Valuation, and Lien. The Vehicle Info sub-tab is active, showing fields for VIN, Title #, Title Date, Plus Code, RMV Vehicle ID, Adjustment Date, Dealer Code, Renewal Code, Vehicle Fuel Code, and Action Code. It also includes Physical Info (Odometer, Axles, Body Series, Length, Weight, Trailer Length) and Plate Info (Plate #, Plate Issued, Plate Expiration Date, Plate Renewal Type, Plate Status, Plate Category, Registration Use Code, Current Plate Expiration Date).

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

The screenshot shows the 'Property Info (F3)' tab with the 'Valuation' sub-tab selected. It displays various valuation metrics: DOR Value (\$13,110), Total Final Value (\$13,110), Prev Billed Value (\$14,210), and RMV Sales Price (\$25,061.00). The VIN is 1HGCR3F86DA001625. The 'Vehicle' section includes fields for Model Year, Make, Model, Exemption Start/End Dates, and Exempt Value/Percentage. The 'Indicators' section contains a grid of checkboxes for various vehicle conditions like Issue Renewal Flag, Junked, NonUS, Multi Year Tag, Mileage, Lemon, Odometer Name, Motor Change, Odometer Misp/In, Water, Salvage, Certificate, Recon, Odometer Change, and Damage. The 'Bus/Car/Motorcycle/Truck/Cab/Trailer and Chassis' section includes fields for Value, Acquisition Year, Acquisition Cost, Engine Size, Passenger Capacity, and High Mileage/Odometer. There are also fields for Vehicle Last Inspection Mileage and Date.

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

The screenshot shows the 'Property Info (F3)' tab with the 'Lien' sub-tab selected. It displays fields for the lien holder's name (Last, First, Middle, Suffix), Business/Government/Other Name, Business Type, In Care Of, Address 1, Address 2, Address 3, City, State, and Zip.

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)	
Adj#	Processed By	Process Date	Status	Adjustment Type/ Reason	Entered Date/ By	Appeal Level Attribute: Old Data -- New Data			
727907	CC	08/24/2018	Approved	Abstract Info/ Processed In Error	8/24/2018 CC	Description: -- 2018 ACUR 45 Total Taxable Value: 38320 -- 0			
				Property Info/ Processed In Error	8/24/2018 CC	Exempt Code: -- EXETPRO Exempt Code Value Type: -- OVEST Value Exempt: -- 38320 Value Exempt Pct: -- 100			

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)	
Date/Time	User ID	Field Changed	Old Data	New Data					
8/24/2018 1:47:04 PM	CC	Abstract Status	Adj Pending	Billed					
8/24/2018 1:46:50 PM	CC	Property assessed value	\$38,320	\$0					
8/24/2018 1:46:50 PM	CC	Property exemption code		Temporary					
8/24/2018 1:46:50 PM	CC	Abstract Description		2018 ACUR 45					
8/24/2018 1:46:50 PM	CC	Abstract Status	Billed	Adj Pending					

Notes Tab

The Notes tab includes any notes added to the abstract.

Abstract Info (F2)		Property Info (F3)		Adjustments (F4)		Change History (F5)		Notes (F6)		
<input type="checkbox"/> All Notes <input checked="" type="checkbox"/> Notes <input checked="" type="checkbox"/> Logs <input checked="" type="checkbox"/> Documents <input type="button" value="Refresh"/>										
Add Note										
<input type="radio"/> Temporary <input checked="" type="radio"/> Permanent <input type="button" value="Add"/>										
TYPE NOTE HERE...										
Year For: 2018										
8/24/2018 1:48:00 PM	Updated By	Entity	REQ TO RELEASE FROM FLOW MOTORS GREENSBORO - LRP ISSUED IN ERROR. TRANSFERRING 0002C.				Edit			
	CC	ABSTRACT					Delete			
8/10/2018 9:09:37 AM	Updated By	Entity	[T] Created by web service; IPS call; Issue new LRP				Edit			
	VTSWEBSERVICE	ABSTRACT					Delete			

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.



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.

Exercise Steps

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

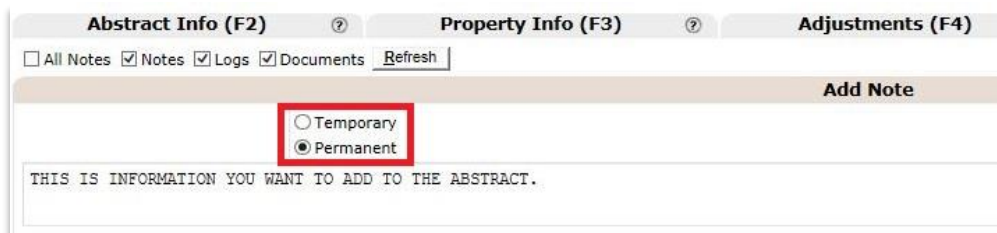


The Notes tab displays.

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



3. Select **Temporary** or **Permanent**.



i 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*.

Adding Notes to an Abstract (continued)

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

The Note is added to the abstract.

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

The note is saved with the abstract and a note icon will appear on the Notes tab.

Editing a Note

- From the Maintain Vehicle Abstract page **Notes** tab, locate the note you wish to edit and select **Edit**.

- Edit your note and click **Save**.

! 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.

i An abstract that contains notes will have a note icon on the Notes tab.



MODULE 2:

ADJUSTMENTS, PRORATIONS, AND

REFUNDS



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.



When an adjustment is being entered into NCVTS, the LPA, DMV, and the county cannot be in the STARS record. All users must exit the record and return after the adjustment process is complete.

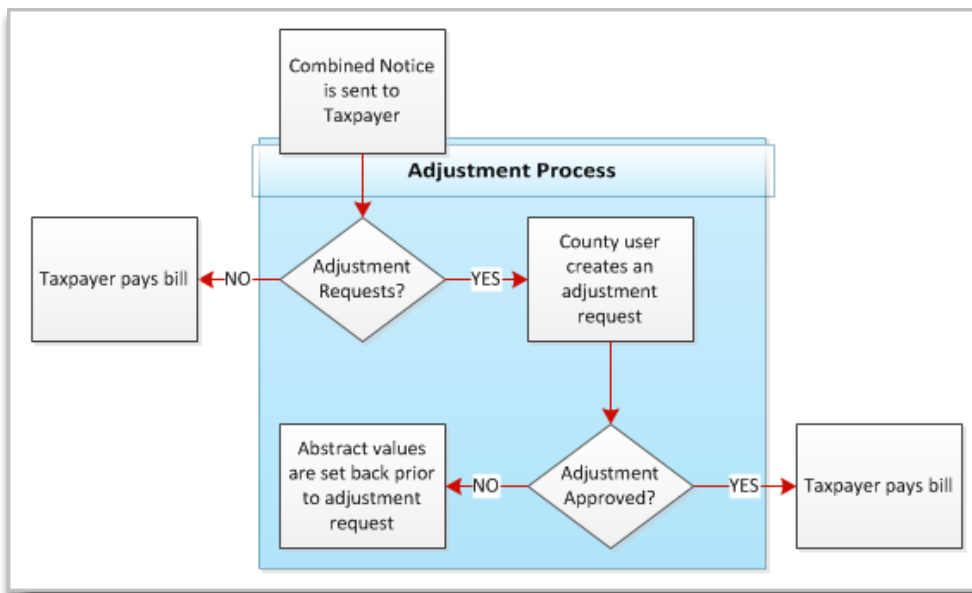
Objectives

- ▶ 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

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.



i 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.

Appeals vs. Adjustments

 The taxpayer has five years to appeal the situs under N.C.G.S. 105-381. Valuation appeals must be submitted in writing within 30 days of the date taxes are due per N.C.G.S. 105-330.2.

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.

Searching for and Reviewing an Existing Adjustment

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.

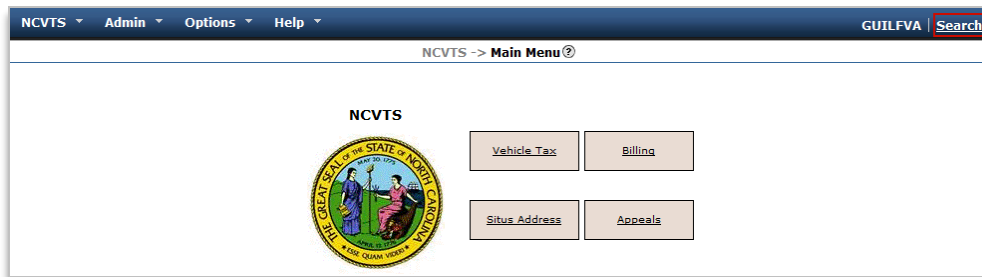
When using the Adjustments tab of the Search page, you are presented with a list of adjustments that meet your criteria. All adjustments for an abstract appear on the Adjustments tab of the Maintain Vehicle Abstract page.



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.

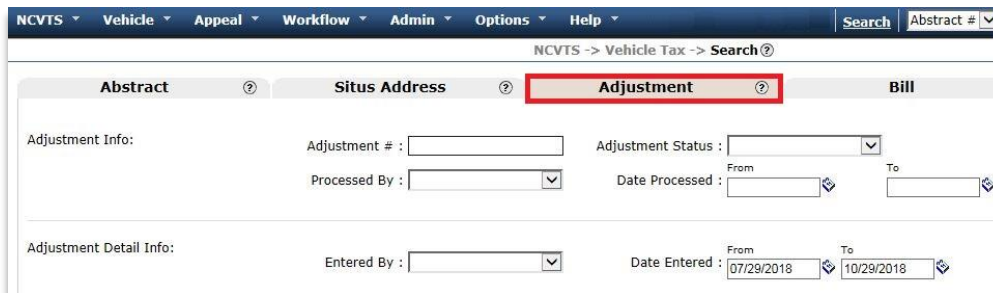
Exercise Steps

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



The Abstract Search page displays.

2. Click the **Adjustment** tab.



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.



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

Searching for and Reviewing an Existing Adjustment (continued)

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

- Click 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.

- Click the **Adjustments** tab.

The Adjustment information displays.

Create an Adjustment Due to Military Exemption

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.



The spouse of an active-duty service member has provided their sponsor'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.

i Exemption options in NCVTS are:

- 12 month pro-ration
- ACP (Address confidentiality program)
- 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

Create an Adjustment Due to Military Exemption (continued)

i 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.

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.

The screenshot shows the 'Maintain Vehicle Abstract' interface. At the top, there is a search bar with 'Abstract #' and a dropdown menu, and a 'Tax Year' dropdown set to '2018'. Below this, the abstract title '2018-0000 RMV' is displayed. A row of buttons includes 'Bill Details', 'Export', 'Cancel', 'Submit', and 'Create Adj' (which is highlighted with a red box). Below the buttons are 'Add To Service Cart' and 'Make RFB' buttons. At the bottom, there are tabs for 'Change History (F5)' and 'Notes (F6)'.

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

The screenshot shows the 'Property Info (F3)' tab selected. It contains a table with the following data:

Type	Description	Exemption	Listing Flag	Appraised Value
Registered Vehicle	1999 HOND CR-V SW	None	On Time	\$ 10495

Below the table, there are sections for 'Vehicle Info', 'Valuation' (highlighted in red), and 'Lien'. The 'Valuation' section shows: DOR Value: \$10495, Total Final Value: \$10,495, Prev Billed Value: RMV Sales Price: \$11,699.00, and VIN #: JHLRD1864. The 'Vehicle' section includes fields for Model Year (1999), Body Style (SW-Station Wagon), and Make (HOND). The 'Indicators' section has checkboxes for Gray, Salvage, Odometer Certificate, Junked, Inv Lessor, and Motor Change.

Create an Adjustment Due to Military Exemption (continued)

6. Enter or select the following:

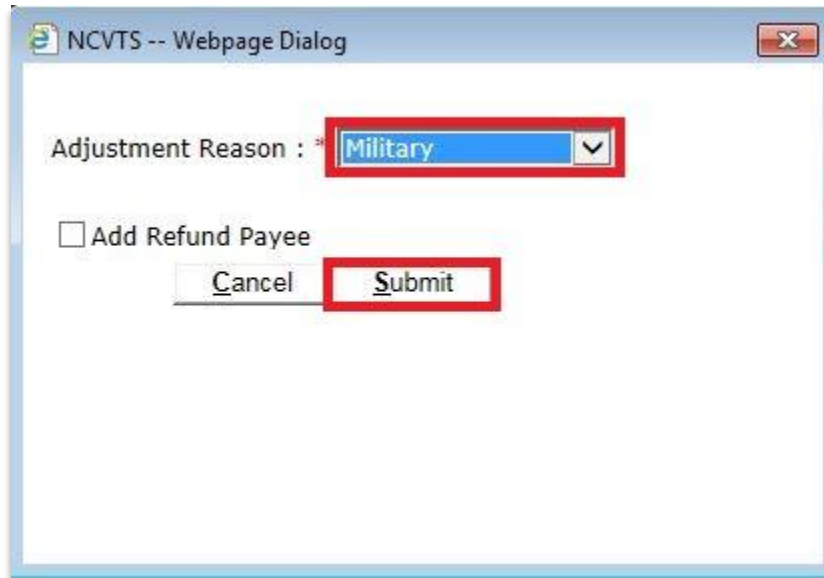
Exemption	Military Permanent
Exempt	Pct
Exempt Percentage	50
Exemption Start Date	[Enter today's date]

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

! Only use a Permanent status if you have an exemption start and end date.

Create an Adjustment Due to Military Exemption (continued)

8. Select an **Adjustment Reason**.



The screenshot shows a dialog box titled "NCVTS -- Webpage Dialog". It contains the following elements:

- A label "Adjustment Reason :" followed by a dropdown menu showing "Military".
- An unchecked checkbox labeled "Add Refund Payee".
- Two buttons: "Cancel" and "Submit". The "Submit" button is highlighted with a red rectangular box.

9. Click the **Submit** button.
10. Add a **Note** to the abstract.

Create an Adjustment Due to Condition

When a vehicle's value is impacted by its condition, you can adjust 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.



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.

 You cannot increase the value of an abstract when the bill has been paid.

Create an Adjustment Due to Condition (continued)



A taxpayer has objected to the value of their vehicle due to its current condition. You can 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.

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.



Create an Adjustment Due to Condition (continued)

5. Enter or select the following:


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

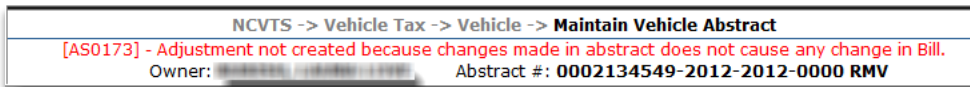
The screenshot shows a web form for creating an adjustment. The 'Override' field is set to '\$ 8332 / 75 % Pct' and the 'Override Status' is set to 'T-Temporary'. The 'Adjustment Type' is set to 'Vehicle Cond/Salvage'. Other fields include 'Value' (11110), 'High Mileage Odometer', 'Acquisition Year', 'Acquisition Cost', 'Engine Size (cc)', 'Passenger Capacity', 'Start Date', 'Starting Value', 'Minimum Value', and 'Dep Schedule'. There is a 'Clear Overrides' button.


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


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

7. Add a **Note** to the abstract.


 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:



 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.

 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.

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 approved/rejected/submitted, 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.

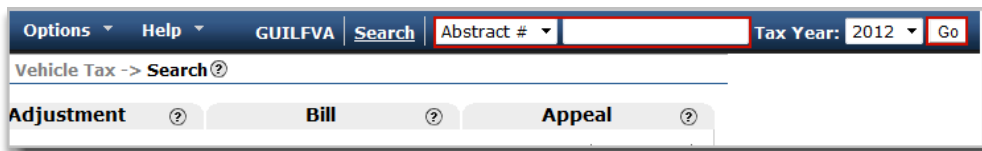
The abstract will not reflect any changes made through an adjustment until the adjustment is approved. You may have the right to approve adjustments yourself, or you may need someone in your county to approve the adjustment after you create it.



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.

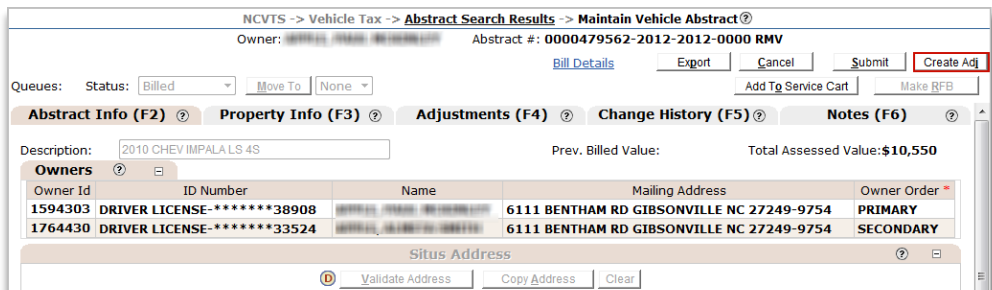
Exercise Steps

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.



Owner Id	ID Number	Name	Mailing Address	Owner Order
1594303	DRIVER LICENSE-*****38908	WALTER, WALTER, WALTER, WALTER	6111 BENTHAM RD GIBSONVILLE NC 27249-9754	PRIMARY
1764430	DRIVER LICENSE-*****33524	WALTER, WALTER, WALTER, WALTER	6111 BENTHAM RD GIBSONVILLE NC 27249-9754	SECONDARY

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)

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

Type	Description	Exemption	Listing Flag	Appraised Value	Total Assessed Value
Registered Vehicle	2010 TOYT CAMRY LE/XLE/SE 4S	None	On Time	\$ 10550	\$10,550

Valuation tab details:

- Valuation Date: 01/01/2013
- Total Final Value: \$10,550
- Prev Billed Value: RMV Sales Price: \$22,998.00
- Make: TOYT
- Model: CAMRY LE/XLE/SE
- Model Year: 2010
- Body Style: 4S
- VIN: 4T1BK3EK9AU604876
- Title #: 774457111526437
- Odometer: 31882
- Plate #: S2123
- Plate Issued: 01/01/2013
- Plate Expiration Date: 12/31/2013

The Valuation tab displays.

- Enter or select the following:

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

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

The Override amount and percentage good display.

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

Bus/Car/Motorcycle/Truck/Cab/Trailer and Chassis

Prior Year Value: \$18,160 Final Value: \$4,536

Prior Year High Mileage: 10550 Vehicle Last Inspection Mileage: 200000 Vehicle Last Inspection Date:

Value: * 10550 High Mileage Odometer: 200000 Calc HM Adjustment Type: High Mileage

Acquisition Year: Override: \$ 4536 / 43% Start Date: Starting Value: Minimum Value:

Acquisition Cost: **Override Status: P-Permanent** Dep Schedule: Clear Overrides

Engine Size (cc): Passenger Capacity:

- Click the **Submit** button.

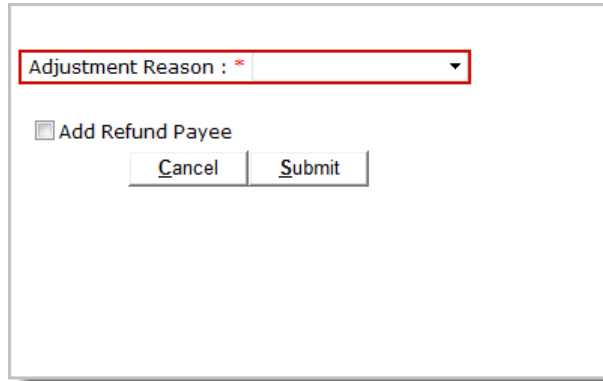
The Adjustment Reason pop-up window displays.



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)

8. Select an **Adjustment Reason**.



The screenshot shows a web-based form for creating an adjustment. At the top, there is a dropdown menu with the text "Adjustment Reason : *" and a small downward arrow. Below this dropdown is a checkbox labeled "Add Refund Payee". At the bottom of the form, there are two buttons: "Cancel" and "Submit". The dropdown menu is highlighted with a red border.

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. Add a **Note** to the abstract.

i Check the **Add Refund Payee** box to change the mailing address information.

i 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.

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.



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.

A screenshot of the "Situs Address" form in a software application. The form has a title bar "Situs Address" and several buttons: "Validate Address", "Generic", "Copy Address", and "Clear". The "Clear" button is highlighted with a red box. Below the buttons are input fields for "St./House#", "Unit #", "Pfx", "St Name*", "St Type", and "Sfx". The "St Name*" field contains "MAIN". Below these are fields for "City", "State", "Zip", and "Parity". The "City" field contains "RALEIGH" and the "State" field contains "NC". At the bottom, there is a section "Address From DMV:" with the text "112 S FERN ABBE LN CARY NC 27518".

4. Enter the **St. Name** of the Situs address.
5. Click the **Validate Address** button.

A screenshot of the "Situs Address" form in a software application. The form has a title bar "Situs Address" and several buttons: "Validate Address", "Generic", "Copy Address", and "Clear". The "Validate Address" button is highlighted with a red box. Below the buttons are input fields for "St./House#", "Unit #", "Pfx", "St Name*", "St Type", and "Sfx". The "St Name*" field contains "FERN ABBEY". Below these are fields for "City", "State", "Zip", and "Parity". At the bottom, there is a section "Address From DMV:" with the text "112 S FERN ABBE LN CARY NC 27518".

Creating an Adjustment for a Situs Address Change (continued)

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

Select	House#	Unit#	Pre (DIR)	St Name	St Type	Suffix (DIR)	Tax District	Postal Address	Parity
<input type="radio"/>	107		S	FERN ABBEY	LN		WAKE COUNTY,CARY	27518 8980 CARY	UNKNOWN
<input type="radio"/>	108		S	FERN ABBEY	LN		WAKE COUNTY,CARY	27518 8980 CARY	UNKNOWN
<input type="radio"/>	109		S	FERN ABBEY	LN		WAKE COUNTY,CARY	27518 8980 CARY	UNKNOWN
<input type="radio"/>	110		S	FERN ABBEY	LN		WAKE COUNTY,CARY	27518 8980 CARY	UNKNOWN
<input type="radio"/>	111		S	FERN ABBEY	LN		WAKE COUNTY,CARY	27518 8980 CARY	UNKNOWN
<input checked="" type="radio"/>	112		S	FERN ABBEY	LN		WAKE COUNTY,CARY	27518 8980 CARY	UNKNOWN
<input type="radio"/>	113		S	FERN ABBEY	LN		WAKE COUNTY,CARY	27518 8980 CARY	UNKNOWN

1 2

7. Click the **Submit** button at the top right of the page.
8. Select an **Adjustment Reason**.

Adjustment Reason : * Situs error ▼

Add Refund Payee

9. Click the **Submit** button.

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

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.

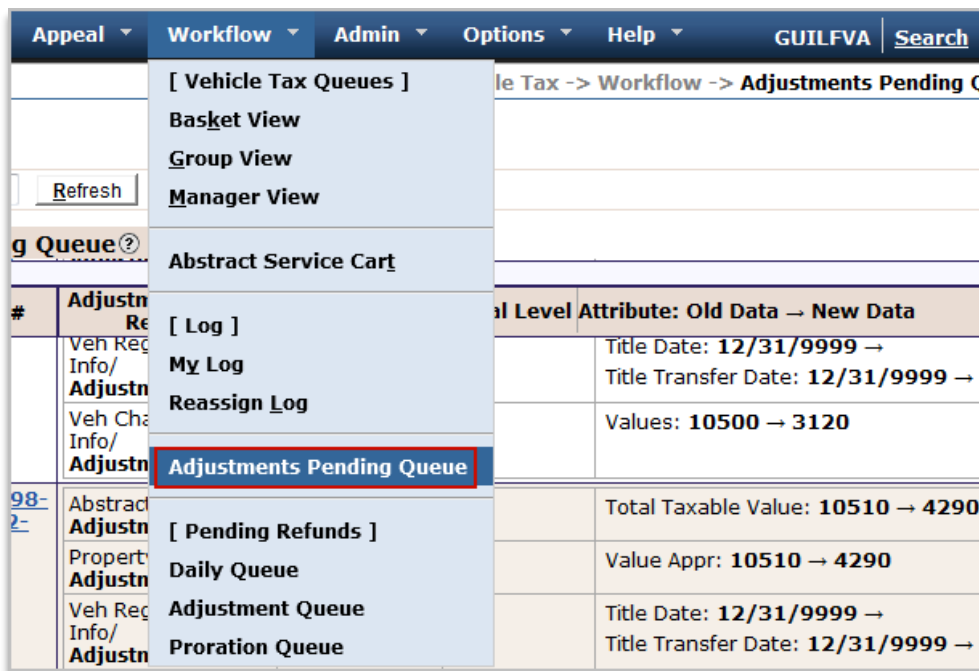


A number of adjustments to billed abstracts need review. You need to go review each adjustment and approve or reject them as appropriate.

i 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.

Exercise Steps

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



The adjustments that need review display.

Approving and Rejecting Adjustments (continued)

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

Adj#	Abstract#	Adjustment Type/Reason	Entered Date/By	Appeal Level	Attribute: Old Data -> New Data
7	0000731147-2012-2012-0000	Abstract Info/Adjustment	1/9/2013 GUILFVA		Total Taxable Value: 10500 -> 3120
		Property Info/Adjustment	1/9/2013 GUILFVA		Value Appr: 10500 -> 3120
		Veh Registration Info/Adjustment	1/9/2013 GUILFVA		Title Date: 12/31/9999 -> Title Transfer Date: 12/31/9999 ->

3. Click the **Approve** button.

The adjustment was successfully approved. **OR**

4. Click the **Reject** button.

The adjustment was successfully rejected.



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.

i 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.



Chapter 2: Creating Prorations and 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.

Three types of refunds may be generated within NCVTS:

- ▶ Daily
- ▶ 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 either releases the obligation to pay the due amount, or refund of the payment already made.



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**, open the abstract you would like to prorate.
2. Go to the **Bill Detail** screen.
3. Click the **Prorate Bill** button.

The screenshot shows a software interface for 'Abstract -> Bill Detail'. At the top, there are buttons for 'Interest Recalc', 'Prorate Bill' (highlighted with a red box), and 'Print'. Below this is a section for 'Mailing Address' with the value '3253 SANDHILL DR FAYETTEVILLE NC 28306' and 'Owner Order **' with the value 'PRIMARY'. A 'Bill Info' section contains the following data:

Source Type/System:	RMV PROPERTY TAX		
Abstract #:	0044747223-2018-2018-0000		
Bill Date:	10/10/2018	Created By:	VTSWEBSERVICE
Interest Begin Date:		Final Payment Date:	10/11/2018
Bill Due Date:			

The Prorate Bill pop-up window displays.

Bill Proration (continued)

4. Select or enter the following:

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

Cancel | Print | Calculate Proration | Submit

Prorate Bill ⓘ

Bill Number : 0044747223-2018-2018-0000-00 REG Months Billed: 12
 Payer : Plate Expiration Date: 10/31/2019
 Mailing Address : 3253 SANDHILL DR FAYETTEVILLE Months Previously Released: 0
 NC 28306

Reason for Proration: * [Dropdown]
 Plate Surrender Date: * [Date Picker]
 Months to Release: [Input]

Category	Original Billed Amount(\$)	Release Amount(\$)	Prorated Amount Due(\$)	Paid Amount(\$)	Remaining Amount Due(\$)
CUMBERLAND COUNTY					
TAX	34.20	0.00	34.20	34.20	0.00
CITY OF FAYETTEVILLE					
TAX	21.38	0.00	21.38	21.38	0.00
VEHICLE FEE	10.00	0.00	10.00	10.00	0.00
Total Amount	65.58	0.00	65.58	65.58	0.00

5. Click the Calculate Proration button.

Cancel | Print | **Calculate Proration** | Submit

Months Billed: 12 Reason for Proration: * [Vehicle Sold]
 Plate Expiration Date: 10/31/2019 Plate Surrender Date: * [11/01/2018]
 Months Previously Released: 0 Months to Release: 11

6. The estimated refund is auto-calculated.

Cancel | Print | Calculate Proration | Submit

Prorate Bill ⓘ

Bill Number : 0044747223-2018-2018-0000-00 REG Months Billed: 12 Reason for Proration: * [Vehicle Sold]
 Payer : Plate Expiration Date: 10/31/2019 Plate Surrender Date: * [11/01/2018]
 Mailing Address : 3253 SANDHILL DR FAYETTEVILLE Months Previously Released: 0 Months to Release: 11
 NC 28306

Category	Original Billed Amount(\$)	Release Amount(\$)	Prorated Amount Due(\$)	Paid Amount(\$)	Remaining Amount Due(\$)
CUMBERLAND COUNTY					
TAX	34.20	31.35	2.85	2.85	0.00
CITY OF FAYETTEVILLE					
TAX	21.38	19.60	1.78	1.78	0.00
VEHICLE FEE	10.00	0.00	10.00	10.00	0.00
Total Amount	65.58	50.95	14.63	14.63	0.00

REFUND(\$): 50.95 + 0.00 = 50.95

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

Bill Proration (continued)

7. Click the **Submit** button.

Cancel Print Calculate Proration **Submit**

Months Billed: **12** Reason for Proration: **Vehicle Sold**

Plate Expiration Date: **10/31/2019** Plate Surrender Date: **11/01/2018**

Months Previously Released: **0** Months to Release: **11**

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

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

Transaction Summary					
Date	Type	Update User	Trans #	Interest Date	Trans Amount(\$)
10/10/2018	PAYMENT	VTSSUPP	2345	10/10/2018	65.58
11/29/2018	PRORATION	GUILFVA	47		50.95
11/29/2018	PAYMENT REVERSE	VTSCASHIERING	13125	10/10/2018	65.58
11/29/2018	PAYMENT	VTSCASHIERING	13125	10/10/2018	14.63
11/29/2018	REFUND	VTSCASHIERING	13125		50.95



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.

i 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.

i 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.

Reversing a Proration



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.

For instructions on how to void the authorization on a refund, see **Void an Authorized Refund** later in this chapter.

Exercise Steps

1. Using **Quick Search**, open the abstract you would like to prorate.
2. Go to the **Bill Detail** screen.
3. Open the **Transaction Summary** tab.
4. Click the Proration transaction number.

Transaction Summary						
Date	Type	Update User	Trans #	Interest Date	Trans Amount(\$)	
06/12/2018	PAYMENT	VTSSUPP	44230010	6/12/2018		63.36
10/29/2018	PRORATION	GP	1107380			42.24
10/29/2018	PAYMENT REVERSE	VTSCASHIERING	47915648	6/12/2018		63.36
10/29/2018	PAYMENT	VTSCASHIERING	47915648	6/12/2018		21.12
10/29/2018	REFUND	VTSCASHIERING	47915648			42.24

5. Select the reason for voiding the proration.

Proration Details?

Bill # : 0017651865-2017-2017-0000-00 REG

Payer :

Mailing Address : 4808 FELLOWS CT HOPE MILLS NC 28348-9609

Trans #	Release Amt(\$)	Refund Amt(\$)	Month Released	Plate Surrender Date	Proration Date	Create User	Void Date	Void User	Reason For Proration
1107380	42.24	42.24	8	10/15/2018	10/29/2018	GP			Vehicle Sold

Incomplete Doc
Processed in error
Used incorrect date

6. Click the **Void** button.

Proration Details?

Bill # : 0017651865-2017-2017-0000-00 REG


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:

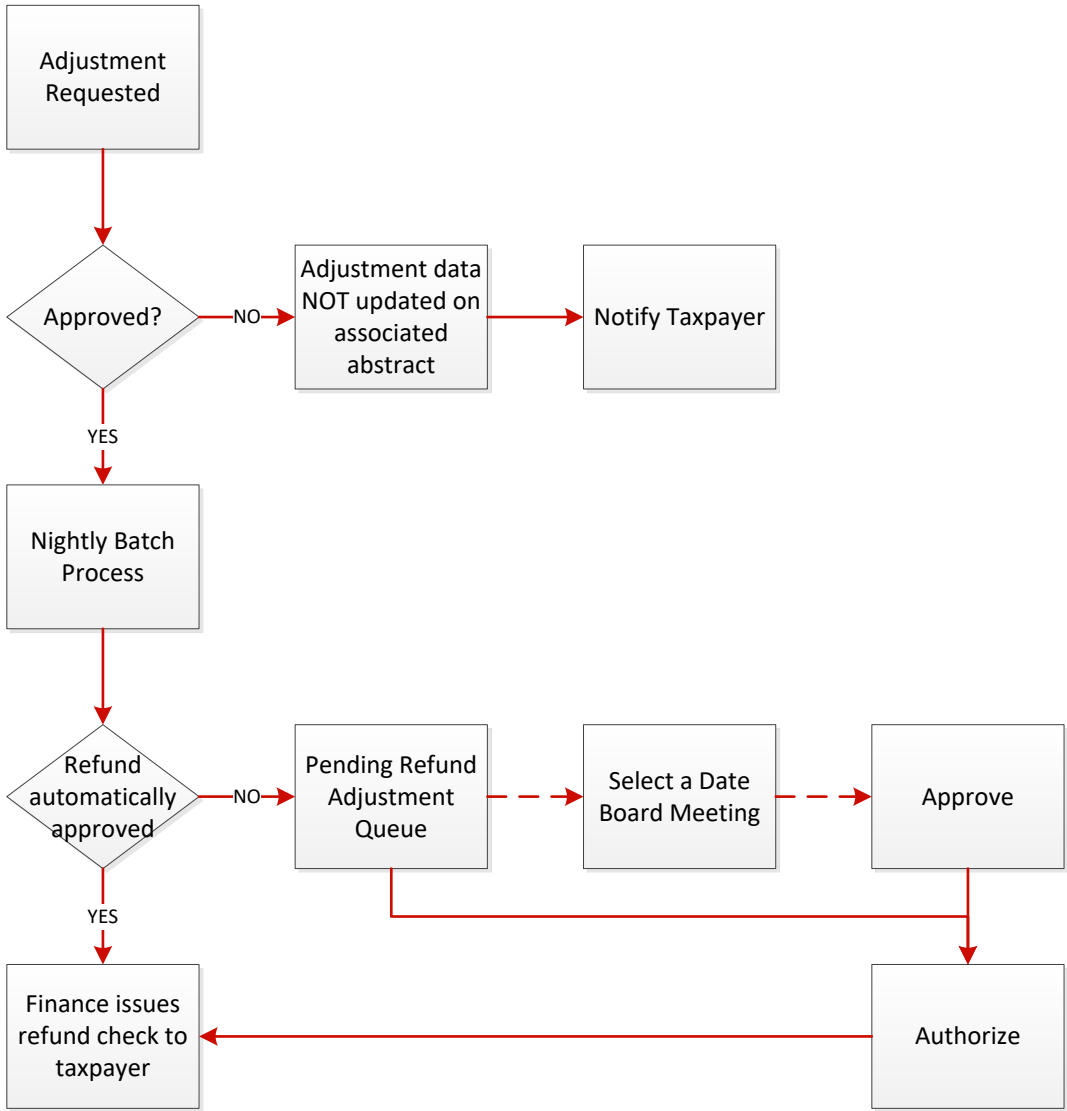
- ▶ Adjustment
- ▶ Daily
- ▶ Proration

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

 Refunds must be requested within one year of the plate surrender date on DMV Form FS20 (receipt for plate surrender).

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

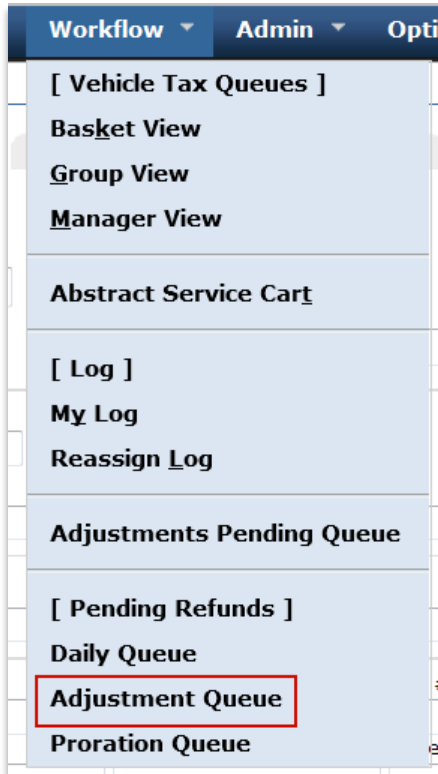
Refund Process



Authorizing an Adjustment Refund

Exercise Steps

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



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

Queue Contents (994 Records) ?						
<input type="checkbox"/>	Transaction #	Adjustment #	Bad Debt	Status	Closed Date	OPID
<input checked="" type="checkbox"/>	47915366	748721		PENDING	10/29/2018	VTSCASHIERING
15004 HOOKS RD MATTHEWS NC 28105						
<input type="checkbox"/>	47915369	748681		PENDING	10/29/2018	VTSCASHIERING
18478 W CATAWBA AVE CORNELIUS NC 28031						
<input type="checkbox"/>	47915370	748678		PENDING	10/29/2018	VTSCASHIERING
10526 GREENHEAD VIEW DR CHARLOTTE NC 28262						
<input type="checkbox"/>	47915371	748675		PENDING	10/29/2018	VTSCASHIERING

Authorizing an Adjustment Refund (continued)

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

Board Meeting Date: 12/18/2018 [v] [Approve] [Deny] [Authorize] [Edit]
[Set Board Date] [Undo Approve/Deny]

Bill #	Received Amount	Refund Amount	Board Date	Adjustment Date	Approve Deny
0044506066-2018-2018-0000-01	\$59.91	\$34.43		10/29/2018	

- 4. Click the **Approve** button.

Board Meeting Date: 12/18/2018 [v] [Approve] [Deny] [Authorize] [Edit]
[Set Board Date] [Undo Approve/Deny]

Bill #	Received Amount	Refund Amount	Board Date	Adjustment Date	Approve Deny
0044506066-2018-2018-0000-01	\$59.91	\$34.43		10/29/2018	

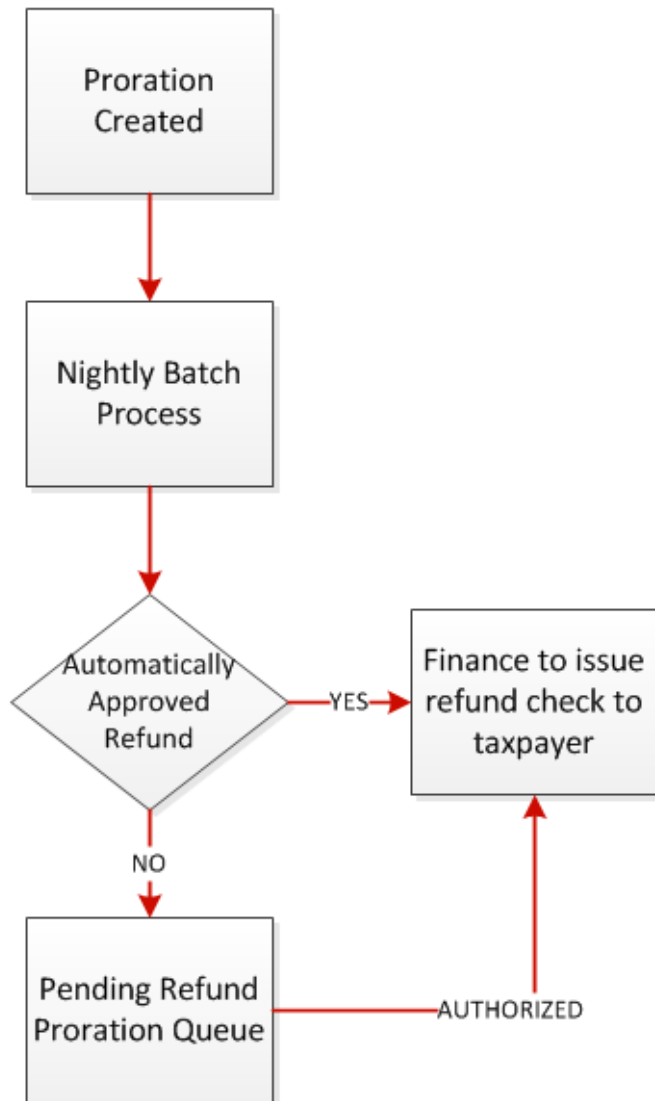
- 5. Click the **Authorize** button.

Board Meeting Date: 12/18/2018 [v] [Approve] [Deny] [Authorize] [Edit]
[Set Board Date] [Undo Approve/Deny]

Bill #	Received Amount	Refund Amount	Board Date	Adjustment Date	Approve Deny
0044506066-2018-2018-0000-01	\$59.91	\$34.43		10/29/2018	

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

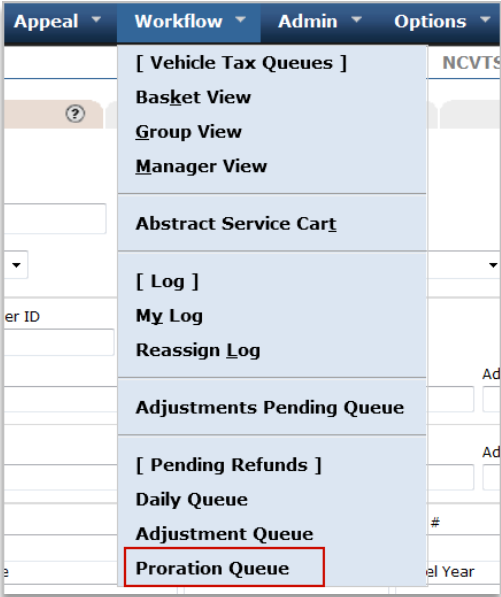
Authorizing a Proration Refund



Authorizing 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 to authorize.

A screenshot of a table titled "Queue Contents (634 Records)". The table has columns for Transaction #, Bad Debt, Status, Closed Date, and OPID. The first record is selected, indicated by a checked checkbox in the first column. The selected record has a Transaction # of 47915381, Status of PENDING, and Closed Date of 10/29/2018. Below the table, the address "2427 MT HOLLY HUNTERSVILLE RD CHARLOTTE NC 28214-8302" is displayed. The second record has a Transaction # of 47915403 and Status of PENDING.

<input type="checkbox"/>	Transaction #	Bad Debt	Status	Closed Date	OPID
<input checked="" type="checkbox"/>	47915381		PENDING	10/29/2018	VTSCASHIERING
2427 MT HOLLY HUNTERSVILLE RD CHARLOTTE NC 28214-8302					
<input type="checkbox"/>	47915403		PENDING	10/29/2018	VTSCASHIERING
612 PENNY ROYAL AVE FORT MILL SC 29715-9612					

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.

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.

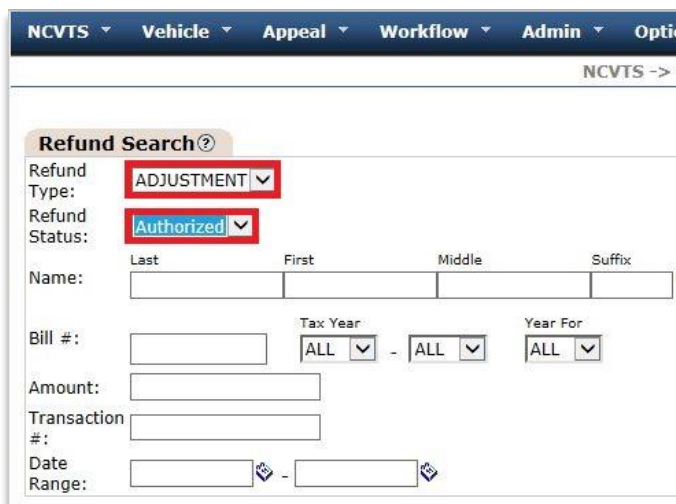
Exercise Steps

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

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

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

The screenshot shows the 'Refund Search' form. The 'Refund Type' dropdown is set to 'DAILY' and the 'Refund Status' dropdown is set to 'Authorized'. Other fields like Name, Tax Year, and Date Range are visible but not filled.

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

The screenshot shows the search results for 'DAILY AUTHORIZED' refunds. A table titled 'Queue Contents (30 Records)' lists several entries. The first row, with Transaction # 24416300, is selected with a checkmark. A 'Void Authorization' button is visible in the top right.

Transaction #	Bad Debt	Status	Closed Date	OPID	Bill #	Received Amount	Refund Amount
24416300		AUTHORIZED	05/24/2016	VTSSUPP	0031865422-2015-2015-0000-00	\$234.09	\$31.42
933 CANTWELL ST APT 1 CHARLOTTE NC 28208							
24416304		AUTHORIZED	05/24/2016	VTSSUPP	0031865494-2015-2015-0000-00	\$337.56	\$60.46
11333 E W T HARRIS BLVD CHARLOTTE NC 28212							
24416309		AUTHORIZED	05/24/2016	VTSSUPP	0031865570-2015-2015-0000-00	\$358.42	\$64.37
3808 BLANDWOOD DR CHARLOTTE NC 28217							
24416115		AUTHORIZED	05/24/2016	VTSSUPP	0031847438-2015-2015-0000-00	\$225.11	\$101.52

5. Click the **Void Authorization** button.



MODULE 3:

ABSTRACT PROCESSING



Chapter 1: Valuation Queues

Introduction

The Valuation 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
- ▶ Add abstracts to the Abstract Service Cart
- ▶ Process abstracts from the ANTIQUE queue
- ▶ Process abstracts from the VINTAGE queue
- ▶ Process abstracts from the PLUS_CODE queue
- ▶ Process abstracts from the CONDITION_CODE queue
- ▶ Process abstracts from the EXEMPT queue
- ▶ Process abstracts in the NOTES queue
- ▶ Process abstracts from NO_VALUE queues
- ▶ Process abstracts from the TRAILER queue
- ▶ Process abstracts from the RV queue


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).

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
All Queues	All abstracts located in the Vehicle Tax Queue
No Value	Vehicles (buses, cars, motorcycles, and trucks) whose accurate value is not identified by DOR.
Antique	Vehicles that are 30 years old or older, which have a horseless carriage plate, or that have an Antique plate.
Notes	Vehicles with permanent notes attached to them in the previous year.
Condition	Abstracts where there is a condition code from the previous year and the override status is "T" (temporary).
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.
County Transfer	Abstracts transferred from another county
RV	Vehicles that qualify as a recreational vehicle and an accurate value is not identified by DOR.
Default Address	Situs address is not matched with the NCVTS Situs repository
Trailer	Vehicles with a body style of trailer or utility vehicle and accurate value is not identified by DOR.
Exempt	Vehicles which are permanently exempt from taxes.
Vintage	Vehicles 30 years or older and no antique plate

 Use the Upload Report to see all RVs.

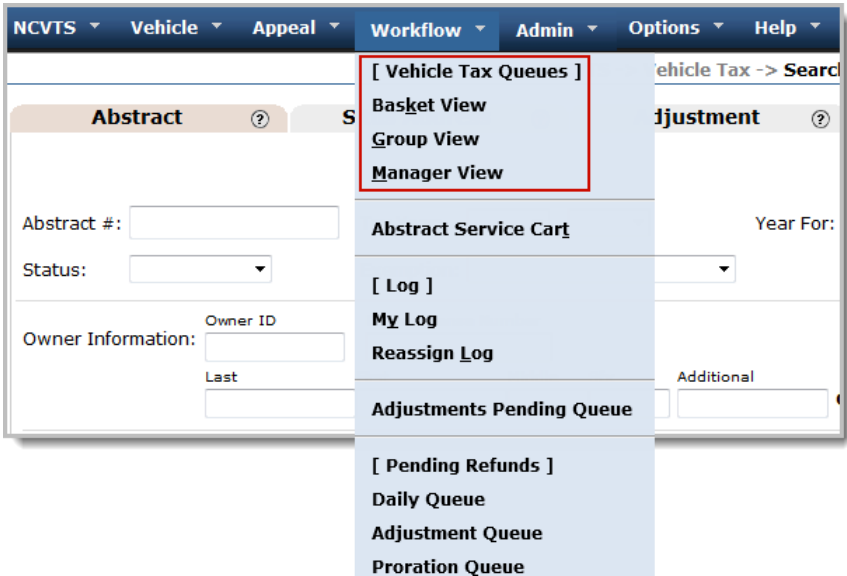
 Use the Upload Report to see all Trailers.

Vehicle Tax Queues

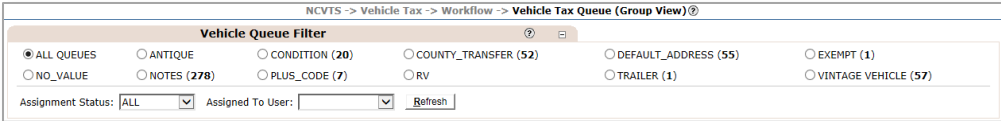
Depending on access rights and assignments, you may choose to view the queues in one of three formats:

- ▶ Basket View
- ▶ Group View
- ▶ Manager View

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



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



Vehicle Tax Queues (continued)

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.

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

Queue Type	Abstract #	Tax District	Final value	DOR value	Assessed Value	Make	Model	Model Year	Body Style	VIN	Weight lbs.	Plate Category	Notes/Corr	Lessee	Owner	Reg. UC	Plate Number
DEFAULT_ADDRESS	0034951564	FRANKLIN CO, FRANKLINTON (D), YOUNGSVILLE (D) FD	30,240	30,240	30,240	ACUR	MDX TECH	2015	MP		0	GAT				PASS	
CONDITION	0002739724	FRANKLIN CO, EPSOM FD	9,780	9,780	9,780	ACUR	TL	2008	4S		0	PVA				PASS	
TRAILER	0035188197	FRANKLIN CO, FRANKLINTON FD	2,879		2,879	ARII		2017	TL		0	PVL				TRLR	
NO_VALUE	0038271726	FRANKLIN CO, BUNN FD				AUDI	Q5 PREMIUM PLUS	2017	MP		0	ANL				PASS	

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.

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

Assigned To	Queue Type	Abstract #	Tax District	Final value	DOR value	Assessed Value	Make	Model	Model Year	Body Style	VIN	Weight lbs.	Plate Category	Notes/Corr
	DEFAULT_ADDRESS	0034951564	FRANKLIN CO, FRANKLINTON (D), YOUNGSVILLE (D) FD	30,240	30,240	30,240	ACUR	MDX TECH	2015	MP	5F9YD4H42FB005294	0	GAT	
	DEFAULT_ADDRESS	0035274263	FRANKLIN CO, FRANKLINTON (D), YOUNGSVILLE (D) FD	19,940	19,940	19,940	ACUR	RDX	2014	MP	5J8TB3H35EL012188	0	PVA	
	DEFAULT_ADDRESS	0038271706	FRANKLIN CO, FRANKLINTON (D), YOUNGSVILLE (D) FD	27,110	27,110	27,110	ACUR	RDX TECHNOLOGY	2016	MP	5J8TB4H59GL016156	0	PVA	

i 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.

i Group View is where abstracts can be transferred to different users. If the county doesn't assign users specific abstracts, all users will work from this view.

Vehicle Tax Queues (continued)

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.

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

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

The screenshot shows the 'Vehicle Tax Queue (Manager View)' interface. It includes a 'Processing Status' summary, a 'Queues Summary' table, and an 'Assignment Status' table. Red callouts point to specific data points:

- Total number of abstracts from current DMV Upload:** Points to the 'Total Received From DMV' value of 3,751.
- Total abstracts processed through the queues:** Points to the 'Total In Queues' value of 6.
- Total number of records in all queues:** Points to the 'Total In Queues' value of 6.
- Individual User Metrics:** Points to the 'Assignment Status' table.

Queue	Total Items In Queue	Assigned Items	Unassigned Items	# Average Days	Oldest Item
NO_VALUE	0	0	0	0	0
Antique	0	0	0	0	0
Antique	0	0	0	0	0
Antique	0	0	0	0	0
ANTIQUE	0	0	0	0	0
DEFAULT_ADDRESS	3	1	2	4	10
PLUS_CODE	0	0	0	0	0
NOTES	0	0	0	0	0
VINTAGE VEHICLE	0	0	0	0	0
EXEMPT	0	0	0	0	0
COUNTY_TRANSFER	3	1	2	3	6

User	Total Item In Basket	Average Days In Basket	Oldest Item	Processed Today	Processed (Last 5 Days)	# Of Items Over 5 Days Old
TPORT	2	6	10	0	0	1

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.



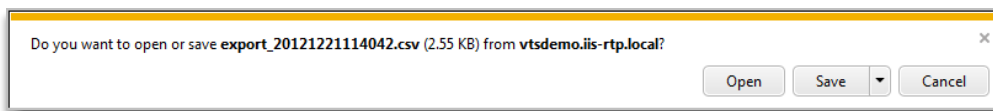
It is the first of the month and you have abstracts in your basket view ready for processing. Before you process the abstracts, you want to keep a list of all the records you will process this month. You can use the Export functionality to keep a list of all records you will process each month.

Exercise Steps

1. From the **Workflow** menu, select **Basket View** or **Group View** from the list of [Vehicle Tax Queues].
2. Click the **Export to CSV** link.

The screenshot shows the 'Vehicle Tax Queue (Basket View - COUNTY01)' interface. It includes a 'Vehicle Queue Filter' section with various radio button options like 'ALL QUEUES', 'ANTIQUE', 'CONDITION (1)', etc. Below the filters is a 'Data Summary' section with an 'Export to CSV' button highlighted in red. The main part of the screenshot is a table with columns: Queue Type, Abstract #, Tax District, Final value, DOR value, Assessed Value, Make, Model, Model Year, Body Style, VIN, Weight Bts., Plate category, Notes/Corr, Lessee, Owner, Reg. UC, and Plate Number. The table contains several rows of vehicle records.

3. A message appears asking whether you want to open or save the exported information.
4. In the message window, click the arrow on the **Save** button and select the **Save as** option.



The Save As window displays.

i 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)

5. Navigate to and select the desired location where you want to store the file.
6. Click the **Save** button. The records are saved to a CSV file.

Using the Abstract Service Cart

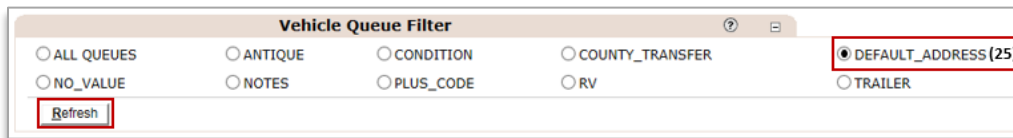
Each user has an Abstract Service Cart that allows you to add and remove abstracts of interest to you. Once you add an abstract to your cart it will remain in your cart until you remove it.



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.

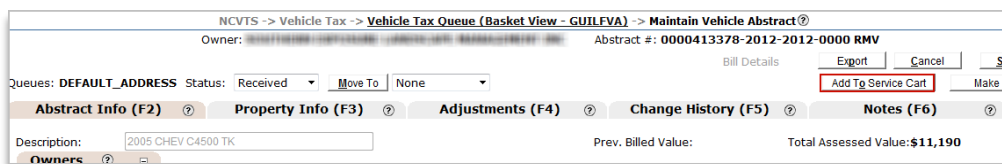
Exercise Steps

1. From the **Workflow** menu, select **Basket View** or **Group 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.



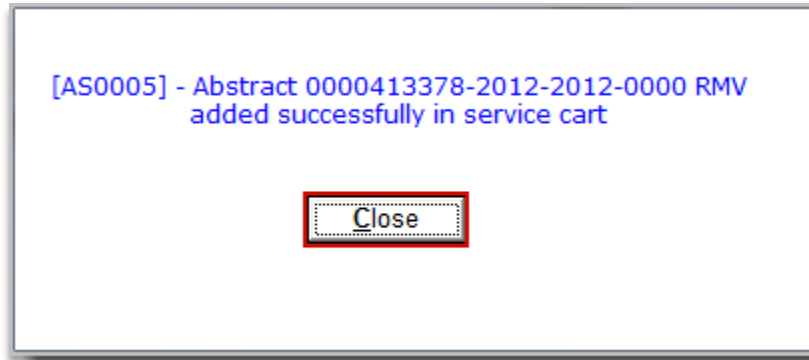
Think of the Abstract Service Cart like the Favorites option of your web browser. Just like Favorites, the Abstract Service Cart is unique to you. Only you can add and remove abstracts from your service cart.



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

Using the Abstract Service Cart (continued)

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.

NCVTS -> Vehicle Tax -> Workflow -> Abstract Service Cart ②

Create Appeals

	Abstract #	Tax Year	Year For	Listing Type	Abstract Type	Owner 1	Owner 2	Situs Address	Status	Void Eff. Date	Personal Value(\$)	Real Value (\$)
<input checked="" type="checkbox"/>	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.



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.

Processing Abstracts from the ANTIQUE Queue

Vehicles with horseless carriage or antique plates, or those that are 30 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 at a value of \$500. If the abstract is rejected for antique status, the vehicle will be billed at the assessed value assigned to the vehicle.



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

Exercise Steps

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

NCVTS -> Vehicle Tax -> Workflow -> Vehicle Tax Qt

Vehicle Queue Filter

ALL QUEUES ANTIQUE (2) CONDITION (1) COUNTY_TRANSFER (6)
 NO_VALUE (22) NOTES (30) PLUS_CODE (12) RV

Assignment Status: [ALL] Assigned To User: [] **Refresh**

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

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

Data Summary

Export | Value Lookup | Notes | **Edit** | Assign Selected Items To User: [] | Assign

	Assigned To	Abstract #	DMV Situs Address	DMV Situs Address2	DMV
<input checked="" type="checkbox"/>		0010525116	768 HALLTOWN RD		SPRUCE
<input type="checkbox"/>		0035249620	51 RIDGEVIEW RD		SPRUCE

The abstract information displays in a pop-up window.

If additional information is needed, send a letter to the owner immediately in order to process prior to billing.

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

Processing Abstracts from the ANTIQUE Queue (continued)

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

Owner : BL Abstract #: 0010525116

Antique:

Do Nothing

Accept

Reject

Value Lookup

Previous Cancel **Submit** Submit & Next Next

The Basket or Group View displays; the number for the ANTIQUE queue decreases by one and the abstract has been cleared from the list. A value of \$500 is placed on the vehicle. Or

5. Select the radio button **Reject**, then click the **Submit** button.

Owner : BL Abstract #: 0010525116

Antique:

Do Nothing

Accept

Reject

Value Lookup

Previous Cancel **Submit** Submit & Next Next

This indicates the vehicle does not qualify for the reduced antique value and the DOR recommended value is placed on the vehicle.

Changing Values

If you need to change the value of an abstract while working the ANTIQUE queue, click on the Abstract # for the record you wish to change to pull up the Maintain Vehicle Abstract screen.

Data Summary							
Export		Value Lookup		Notes	Edit	Assign Selected Items To User: <input type="text"/>	
1							
<input type="checkbox"/>	Assigned To	Abstract #	DMV Situs Address	DMV Situs Address2			
<input type="checkbox"/>		0025487289	75 FIDDLERS DR				
<input type="checkbox"/>		0029586335	30 HOLDEN CT				



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 VINTAGE Queue

Vehicles that are 30 years of age or older and do not have an Antique or Horseless Carriage plate will be assigned to the VINTAGE queue. For the record to leave the queue, a value at or above the residual is entered in the Value field. While all that is required for an abstract to leave the VINTAGE queue is for a value to appear in the Value field, there are many methods for valuing a vehicle.

Exercise Steps

1. From the **Workflow** menu, select either **Basket View** or **Group View** under the Vehicle Tax Queues heading.
2. Select the **VINTAGE** radio button and click the **Refresh** button.

NCVTS -> Vehicle Tax -> Workflow -> Vehicle Tax Queue (Group View) ②

Vehicle Queue Filter ⓘ

ALL QUEUES
 ANTIQUE
 CONDITION
 COUNTY_TRANSFER (1)
 DEFAULT_ADDRESS (1)
 EXEMPT
 NO_VALUE
 NOTES
 PLUS_CODE
 RV
 TRAILER
 VINTAGE VEHICLE (229)

Assignment Status: ALL ▾ Assigned To User: ▾ Median Value: ALL ▾ **Refresh**

3. Click the checkbox for the desired record and click the **Edit** button.


Data Summary ⓘ Export


Export Value Lookup Notes Edit Assign Selected Items To User: ▾ Assign

	Assigned To	Abstract #	Final value	DOR value	Assessed Value	Make	Model	Model Year	Body Style
<input checked="" type="checkbox"/>		0037766040	800	800	800	AMER		1979	MP
<input type="checkbox"/>		0032275492	3,000		3,000	AUST		1963	CN
<input type="checkbox"/>		0026095670	990	990	990	BMW		1974	MC

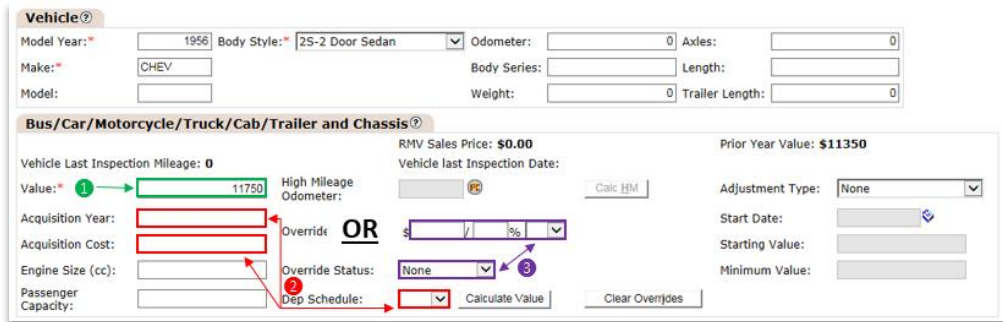
i If an abstract is not given a value, the bill will go out with the DOR Recommended Default Value based on the Make, Model, and Year of the vehicle.

Processing Abstracts from the VINTAGE Queue (continued)

 You can use the NADA Classic Car guide for valuation. To identify a vehicle, you can use TEC, or online services such as VINwiz and Auto Red Book.

 If you want to place a permanent override 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.


- To set a value that allows the valuation process to provide a value in subsequent years, type the value of the vehicle in the **Value** field. To set a valuation based on a set value and depreciation, type the **Acquisition Year** and **Acquisition Cost**, and then select the **Depreciation Schedule**; **OR** type the starting **Value** and **Override** amount and type, and then select the **Override Status**. Use the override method that works best for the vehicle.



Vehicle ?
Model Year: 1956 Body Style: 2S-2 Door Sedan Odometer: 0 Axles: 0
Make: CHEV Body Series: Length: 0
Model: Weight: 0 Trailer Length: 0

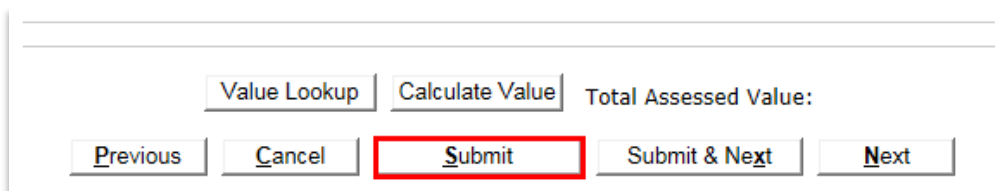
Bus/Car/Motorcycle/Truck/Cab/Trailer and Chassis ?
Vehicle Last Inspection Mileage: 0 RMV Sales Price: \$0.00 Prior Year Value: \$11350
Value: 11750 High Mileage Odometer: Vehicle last Inspection Date: Calc HM Adjustment Type: None
Acquisition Year: OR \$ %
Acquisition Cost: Override Status: None Start Date: Starting Value:
Engine Size (cc): Dep Schedule: None Minimum Value:
Passenger Capacity: Clear Overrides

- 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.



Calculate Value Total Assessed Value: \$16,530
Previous Cancel Submit Submit & Next Next

- Add a **Note** on the abstract.
- Click the **Submit** button at the bottom of the page.



Value Lookup Calculate Value Total Assessed Value: \$16,530
Previous Cancel Submit Submit & Next Next

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

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.



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.



At the beginning of the month, use the upload report to view all vehicles for possible bodies, in addition to the PLUS_CODE queue. Send a letter to the taxpayer for vehicles that may have a body, to obtain more information to value properly.

Exercise Steps

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

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

	Assigned To	Abstract #	Final value	DOR value	Assessed Value	Make	Model	Model Year	Body Style
<input checked="" type="checkbox"/>		0005168948	1,390	910	1,390	CHEV	C30	1981	TK
<input type="checkbox"/>		0040528421	400		400	FRHT	CONVENTIONAL	1996	TK
<input type="checkbox"/>		0040836720	12,330	12,330	12,330	FRHT	CONVENTIONAL	2005	TR

Processing Abstracts from the PLUS_CODE Queue (continued)



Value does not include the chassis! Need to look at the value of the chassis and make sure it doesn't include the plus code value.

- To set a value that allows the valuation process to provide a value in subsequent years, type the value of the body in the **Value** field. To set a valuation based on a set value and depreciation, type the **Acquisition Year** and **Acquisition Cost**, and then select the **Depreciation Schedule**; **OR** type the starting **Value** and **Override** amount and type, and then select the **Override Status**. Use the override method that works best for the vehicle. Select the correct type from the **Truck Body Type** field.

The screenshot shows a valuation form with four main sections: Truck Body, Additional Body 1, Additional Body 2, and Alterations. In the Truck Body section, the Value field contains '480', Acquisition Year is empty, Acquisition Cost is empty, and Truck Body Type is 'DP-Dump Body'. In the Additional Body 1 section, Override is 'OR', Override Status is 'None', and Dep Schedule is empty. In the Alterations section, Adjustment Type is 'None', Start Date is empty, Starting Value is empty, and Minimum Value is empty. A 'Calculate Value' button is located between the Additional Body 1 and Alterations sections.

- 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.

The screenshot shows a summary bar at the bottom of the page. It contains a 'Value Lookup' button, a 'Calculate Value' button (highlighted with a red border), and the text 'Total Assessed Value: \$1,390'. Below this bar are five buttons: 'Previous', 'Cancel', 'Submit', 'Submit & Next', and 'Next'.

- Add a **Note** on the abstract.
- Click the **Submit** button at the top of the page.

The screenshot shows the same summary bar as the previous one, but now the 'Submit' button is highlighted with a red border. The 'Calculate Value' button is no longer highlighted.

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

Processing Abstracts from the PLUS_CODE Queue (continued)



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.

Truck Body ?	Additional Body 1 ?	Additional Body
Value:	<input type="text"/>	Override:
Acquisition Year:	<input type="text"/>	Override Status:
Acquisition Cost:	<input type="text"/>	Dep Schedule:
Truck Body Type:	<input type="text" value="NA-No Added Value"/>	<input type="text"/>

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.



You can request the taxpayer to provide an inspection receipt, service record, or oil change receipt to show the mileage of the vehicle. Be sure to ask for one as close to the January 1 valuation date as possible.

- ▶ 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.

Processing Abstracts from the CONDITION Queue (continued)

Exercise Steps

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

The screenshot shows a 'Vehicle Queue Filter' dialog box with several radio button options: ALL QUEUES, ANTIQUE, **CONDITION (25)**, COUNTY_TRANSFER, NO_VALUE, NOTES, PLUS_CODE, and RV. A 'Refresh' button is located at the bottom left of the dialog.

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

3. Click the checkbox beside the abstract you want to work, and then click the **Edit** button.
4. 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 screenshot displays two sections: 'Vehicle' and 'Bus/Car/Motorcycle/Truck/Cab/Trailer and Chassis'. The Vehicle section includes fields for Model Year (2008), Body Style (4S-4 Door Sedan), Odometer (110899), Axles (0), Make (BUICK), Body Series, Length, Model (LACROSSE), Weight (0), and Trailer Length (0). The Chassis section includes fields for Vehicle Last Inspection Mileage (210), Value (9980), High Mileage Odometer, Acquisition Year, Acquisition Cost, Engine Size (cc), Passenger Capacity, RMV Sales Price (\$23261.00), Vehicle last Inspection Date (7/31/2013), Prior Year Value (\$9736), Adjustment Type (Vehicle Condi/Salvage), Start Date, Starting Value, Minimum Value, and Override (9980). The Override Status is set to T-Temporary.

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

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

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

i Override is based on percent good.

i 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.

Processing Abstracts from the EXEMPT Queue

i Permanent exemptions will return each year. If you do not want the permanent exemptions to populate in the queue every year, set a future end date.

i Temporary exemptions are automatically removed from their exempt status the next year.

! 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 due to its permanent exempt status.

Abstracts in the EXEMPT queue are exempt from tax based on their exemption code and a permanent override status or until the exemption end date. 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 at the assessed value assigned.



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** or **Group View** from the list of [Vehicle Tax Queues].
2. Select the **EXEMPT** radio button, and then click the **Refresh** button

A screenshot of a web interface titled "Vehicle Queue Filter". It features a horizontal row of radio buttons for filtering: ALL QUEUES, ANTIQUE, CONDITION, COUNTY_TRANSFER, DEFAULT_ADDRESS, EXEMPT (25), NO_VALUE, NOTES, PLUS_CODE, RV, TRAILER, and VINTAGE VEHICLE. The "EXEMPT (25)" option is selected and highlighted with a red box. Below the radio buttons is a "Refresh" button, also highlighted with a red box.


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

3. Click the checkbox beside the abstract you want to work, and then click the **Edit** button
4. Select the **Accept** radio button and click the **Submit** button

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

Processing Abstracts from 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 where the note was added. Notes on multiple abstracts can be accepted from the notes queue or reviewed and accepted individually.


 Counties can choose to turn off the Notes queue.



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** or **Group View** from the list of [Vehicle Tax Queues].
2. Hover over the notes icon to review notes on the abstract.

 If you cannot see the notes when hovering over the note icon, check your internet browser's compatibility view settings to make sure nc.gov is included.

Notes/Corr	Lessee	Owner	Plate Number

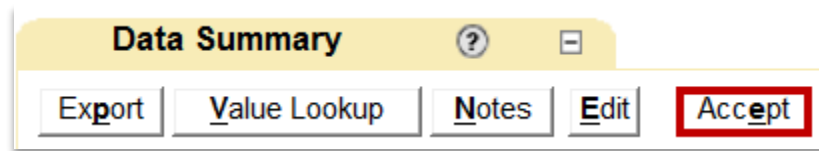
CARFAX2014 ACURA MDX USING RMV VALUE COULD NOT PRINT LETTER PROBLEMS WITH NOT BEING ABLE TO PRINT LETTER DID NOT PRINT NOTHING MAILED
 User: VTSSYS6
 Date: 2/16/2014 1:57:00 PM

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

<input type="checkbox"/>	Assigned To	Abstract #	Tax District	Final value	DOR value	Assessed Value	Make	Model	Model Year	Body Style	VIN	Notes/Corr
<input checked="" type="checkbox"/>		0017173674	MECKLENBURG, CHARLOTTE				ACUR		2014	MP		
<input checked="" type="checkbox"/>		0017172113	MECKLENBURG, CHARLOTTE				ACUR		2014	MP		
<input checked="" type="checkbox"/>		0017173517	MECKLENBURG, CHARLOTTE, SPECIAL DISTRICT 4				ACUR		2014	MP		

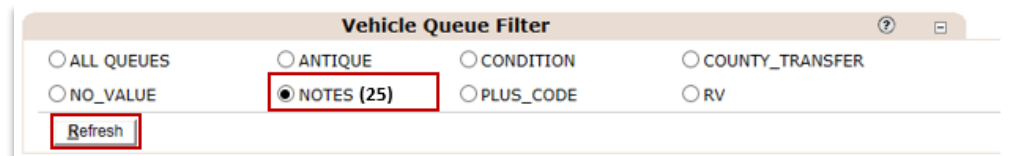
Processing Abstracts from the NOTES Queue (continued)

4. Click the **Accept** button.



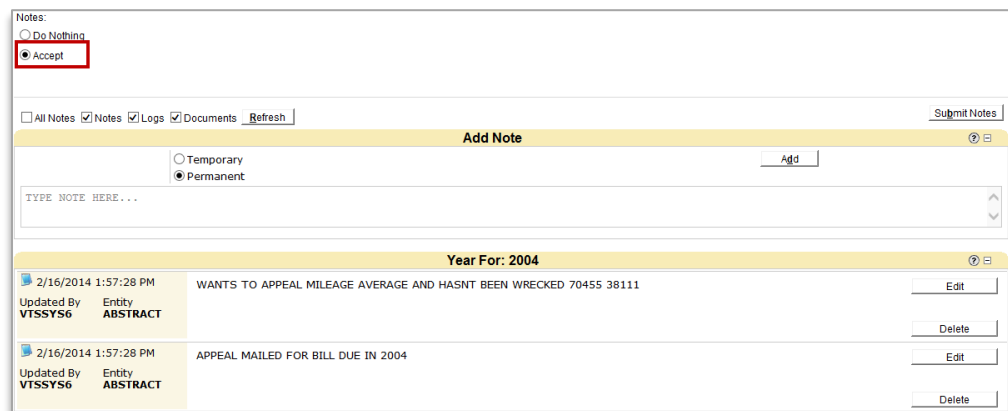
Exercise Steps (Accepting Notes on Individual Abstracts)

1. From the **Workflow** menu, select **Basket View** or **Group 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.
4. Select the **Accept** radio button under Notes.



Processing Abstracts from the NOTES Queue (continued)

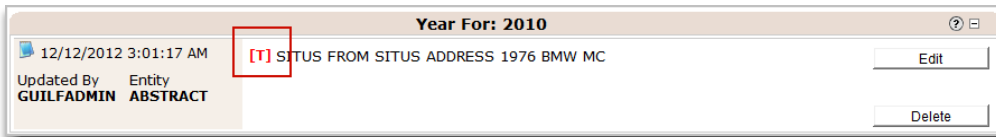
5. Scroll down to the bottom of the page and click the **Submit** button

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



Change Note Status

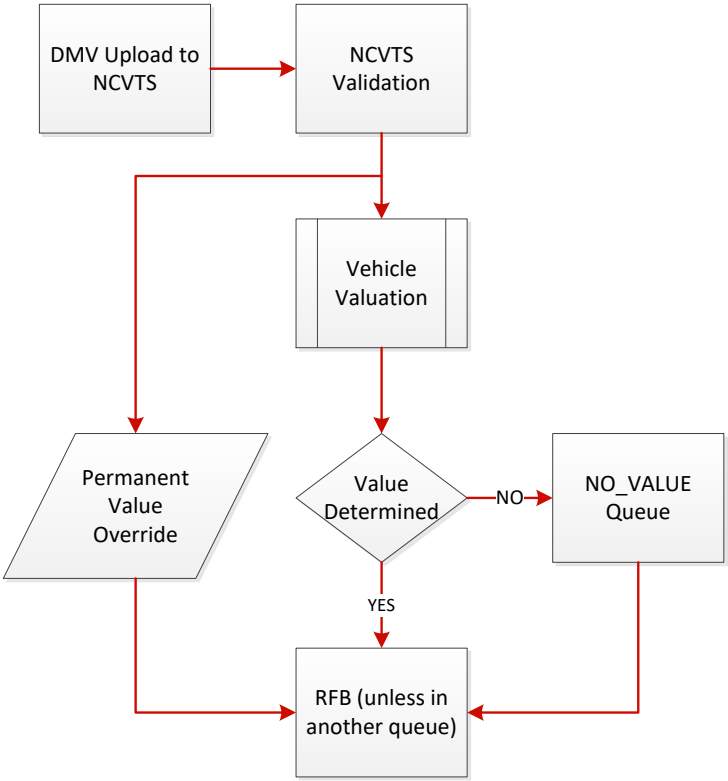
If you would prefer not to review the abstract's note in next year's queue, edit the note and change its status to Temporary. You will need to save the change to the note and then submit the abstract. You do not need to select the Accept radio button, although if you do not select the Accept radio button,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



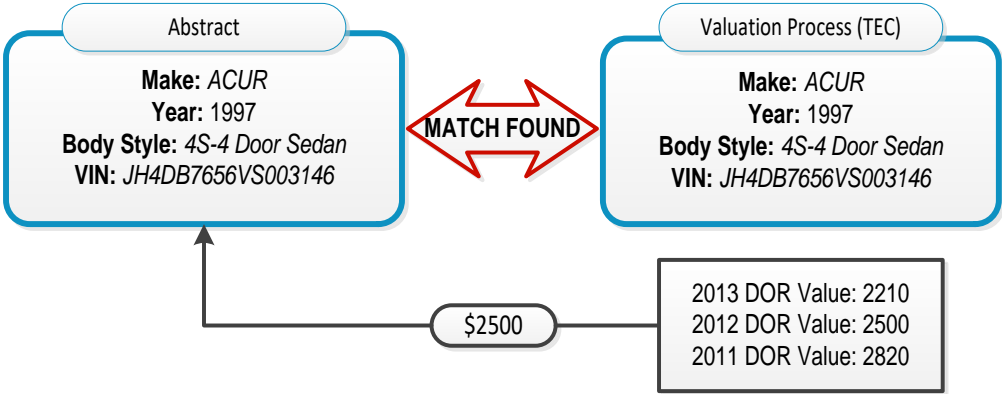
 Temporary notes are marked with a **[T]**.

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 value by DOR.



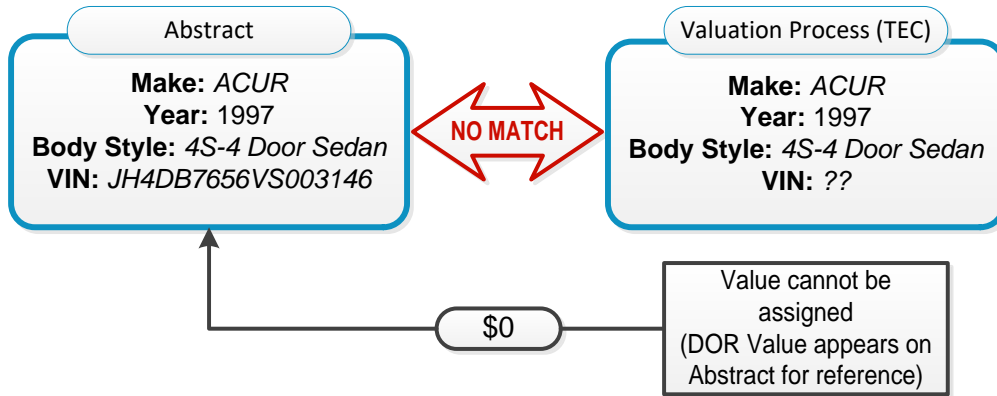
Vehicle Match



Vehicle Valuation Process (continued)

No Vehicle Match

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.

i 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.

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.

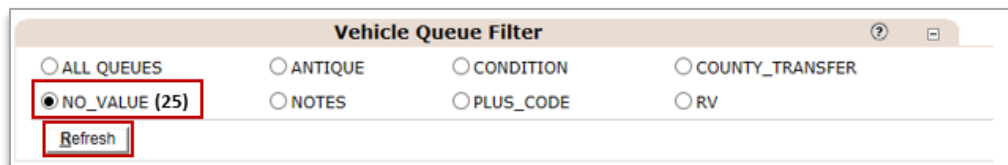
Vehicles that qualify as a recreational vehicle with no value will be assigned to the RV Queue. Vehicles with a body style of trailer or utility vehicle and no value will populate in the TRAILER Queue. For all three of these queues, if no value is entered, it will process at the end of the month with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



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

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



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

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

Abstract #	Final value	DOR value	Value	Make	Model	Model Year	Body Style	VIN	Notes/Corr
0004954756				BMW	760I	1999	4S	WBADN5333XGC91049	
0005029988				BMW	M3	2004	CP	WBSBL93444PN57793	
0004961703				BMW	X5	2001	SW	WBFA53541LP24833	

The abstract information displays in a pop-up window.

Processing Abstracts from the NO_VALUE Queue (continued)

4. Type the value of the vehicle in the **Value** field **OR**

Bus/Car/Motorcycle/Truck/Cab/Trailer and Chassis ?

DOR Recommended Default Value: **\$27620** RMV Sales Price: **\$41206.00**
Vehicle Last Inspection Mileage: **216** Vehicle last Inspection Date: **6/30/2013**

Value:* High Mileage Odometer:

Acquisition Year:

Acquisition Cost: Override: \$ / %

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

Bus/Car/Motorcycle/Truck/Cab/Trailer and Chassis ?

DOR Recommended Default Value: **\$5000** Prior Year Value: Vehicle Last Inspection Mileage: **0** Final Value: Vehicle Last Inspection Date:

Value:* High Mileage Odometer: Adjustment Type:

Acquisition Year: Override: \$ / % Start Date:

Acquisition Cost: Override Status: Starting Value:

Engine Size (cc): Dep Schedule: Clear Overrides Minimum Value:

Passenger Capacity:

6. Select **Pct** or **Val**, then enter the starting **Value** and **Override** amount and type, and then select the **Override Status**.

Bus/Car/Motorcycle/Truck/Cab/Trailer and Chassis ?

DOR Recommended Default Value: **\$5000** Prior Year Value: Vehicle Last Inspection Mileage: **0** Final Value: Vehicle Last Inspection Date:

Value:* High Mileage Odometer: Adjustment Type:

Acquisition Year: Override: \$ / % Start Date:


Acquisition Cost: Override Status: Starting Value:


Engine Size (cc): Dep Schedule: Clear Overrides Minimum Value:

Passenger Capacity:

7. 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.

Total Assessed Value: \$27,500

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

 If you need to research a value, you can use the KBB Motorcycle Guide, NADA, or the vehicle sales price.

Processing Abstracts from the NO_VALUE Queue (continued)

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

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

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** or **Group View** from the list of [Vehicle Tax Queues].
2. Select the **TRAILER** radio button, and then click the **Refresh** button.

Vehicle Queue Filter

ALL QUEUES ANTIQUE CONDITION COUNTY_TRANSFER DEFAULT_ADDRESS
 NO_VALUE NOTES PLUS_CODE RV TRAILER (25)

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.

Data Summary

Export to CSV # of Rows 25 Queue Type

Export Value Lookup Notes **Edit**

Queue Type	Abstract #	Tax District	Final value	DOR value	Value	Make	Model	Model Year	Body Style	VIN	Weight lbs.	Plate Category
<input checked="" type="checkbox"/>	TRAILER 0000712731	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST				ACRO		1999	TL	1A9114121X1005029	0	PPL
<input type="checkbox"/>	TRAILER 0000645523	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST				ACRO		1999	TL	1A9114128X1005030	0	PPL
<input type="checkbox"/>	TRAILER 0000357436	GUILFORD, GREENSBORO				ACRO		2000	IT	1A9114220Y1005006	0	PVI

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**.

The screenshot shows a web form titled "Bus/Car/Motorcycle/Truck/Cab/Trailer and Chassis?". The form contains several input fields and dropdown menus. Two fields are highlighted with red boxes: "Acquisition Year" with the value "2011" and "Acquisition Cost" with the value "5500". Other visible fields include "Value:" (0), "High Mileage Odometer:" (with a "Calc HM" button), "Vehicle Last Inspection Mileage: 0", "Vehicle last Inspection Date:", "Adjustment Type:" (None), "Start Date:", "Starting Value:", "Minimum Value:", "Engine Size (cc):", "Override:" (with a percentage dropdown), "Override Status:" (None), and "Dep Schedule:" (B-8). A "Clear Overrides" button is also present.

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

Processing Abstracts from the RV Queue

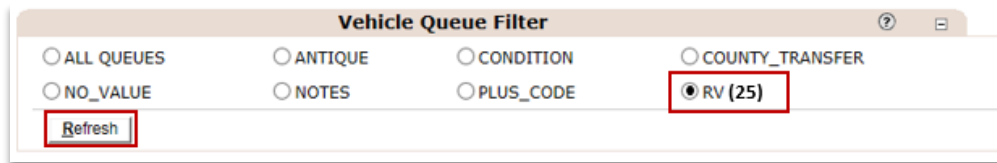
Abstracts for recreational vehicles that cannot be assigned a value during the DMV Upload appear in the RV queue. These abstracts may be processed in the same manner as the abstracts in the NO_VALUE queue. Another option is to manually assign a value and set the depreciation schedule for these abstracts.



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** or **Group 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.

A screenshot of a "Data Summary" table. The table has a header row with columns: Abstract #, Final value, DOR value, Value, Make, Model, Model Year, Body Style, VIN, Length ft., Plate Category, Notes/Corr, Owner, and Req. UC. The first row of data is highlighted with a red box and contains the following values: Abstract # 0000479820, Value AERL, Model Year 2008, Body Style CT, VIN 47CTA4G178J167878, Plate Category PVL, Owner REINOLDS, DONNA RODRIGUEZ, and Req. UC TRLS. The "Edit" button in the table's toolbar is also highlighted with a red box.

Abstract #	Final value	DOR value	Value	Make	Model	Model Year	Body Style	VIN	Length ft.	Plate Category	Notes/Corr	Owner	Req. UC
0000479820			AERL			2008	CT	47CTA4G178J167878		PVL		REINOLDS, DONNA RODRIGUEZ	TRLS

The abstract information displays in a pop-up window.

i You can use the **Upload Report** to view all camper trailers (CT) and house campers (HC).

Processing Abstracts from the RV Queue (continued)

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

Bus/Car/Motorcycle/Truck/Cab/Trailer and Chassis?

DOR Recommended Default Value: \$100

Value: * 0 High Mileage Odometer:

Vehicle Last Inspection Mileage: 0 Vehicle last Inspection Date:

Acquisition Year: 2011 Acquisition Cost: 5500

Override: \$ / %

Adjustment Type: None

Start Date:

Starting Value:

Minimum Value:

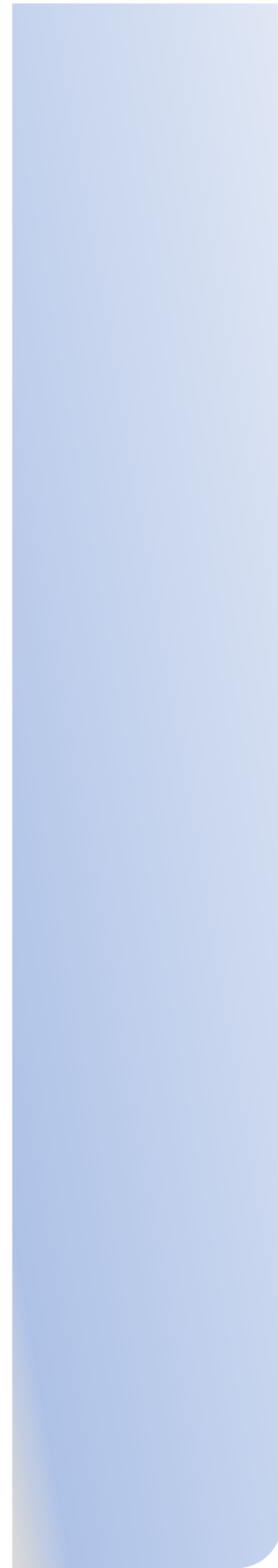
Engine Size (cc): Override Status: None

Passenger Capacity: Dep Schedule: B-8

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

If you need to research a value, you can use the NADA Recreation Vehicle Appraisal Guide.



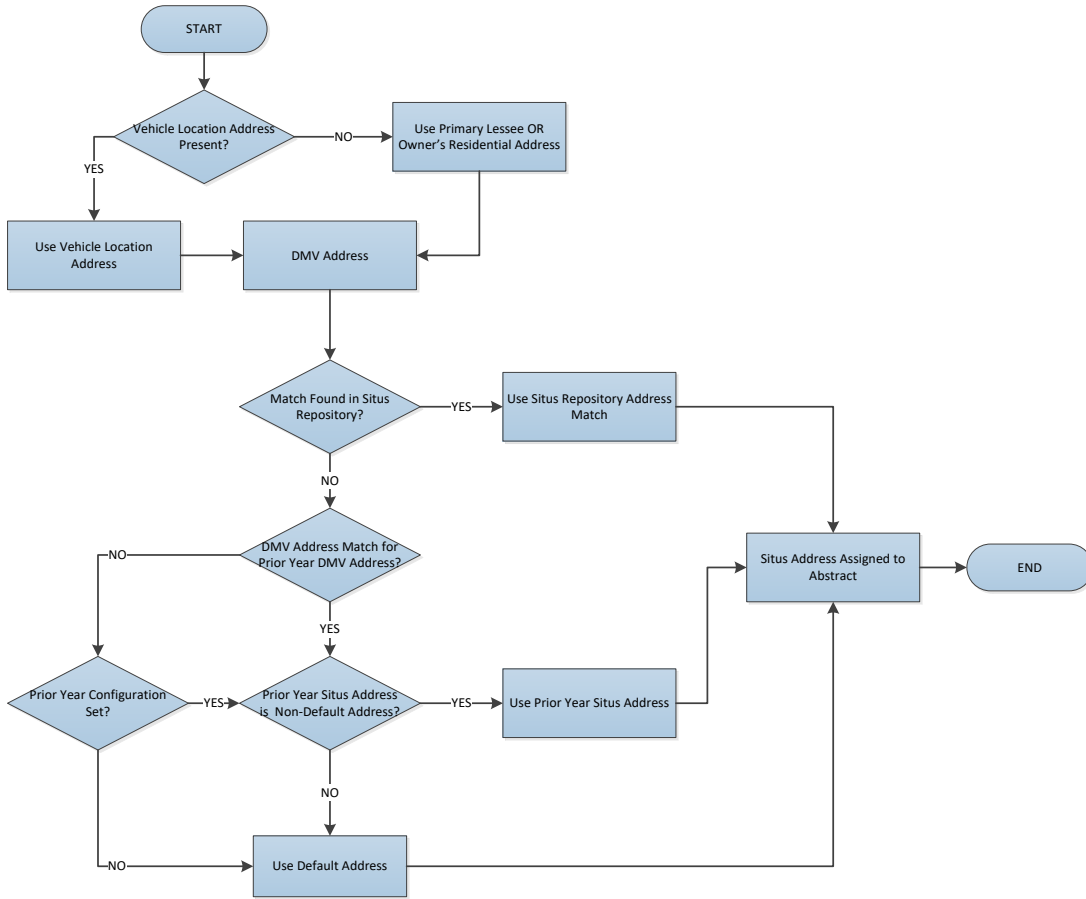
Chapter 2: All Things Situs

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

- ▶ Situs process
- ▶ Review abstracts in the DEFAULT_ADDRESS queue
- ▶ Understand the Situs repository
- ▶ Add and update streets
- ▶ Find the next available county address ID number
- ▶ Add and update Situs addresses and aliases
- ▶ 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

Situs Process



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 mailing address, but keep in mind Situs determines tax district)
- ▶ Abstracts that require you to add addresses to your Situs repository

Understand the Situs Repository

Before going live on NCVTS, each county provided a list of physical addresses to the NCVTS vendor who loaded them into the system. This list is known as the 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 current the Situs repository is kept, the more accurate your taxation will be. The Situs repository will find more matches with the DMV and decrease the amount of work the county will have to do to process 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 and Street Type. 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

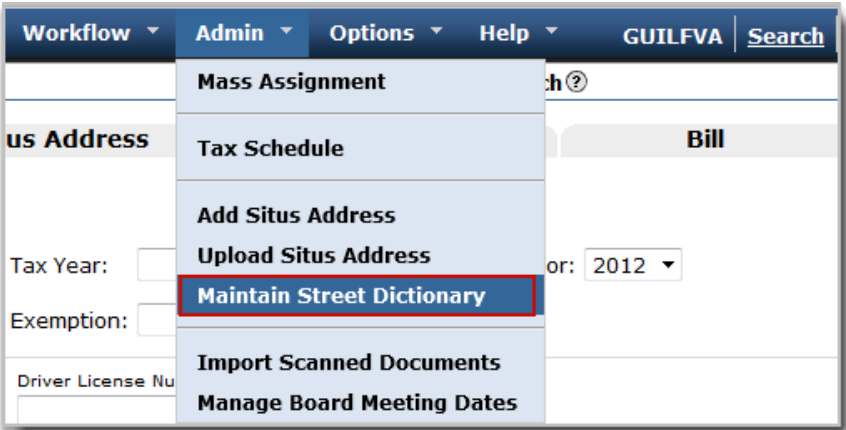
When adding a situs address for a highway, use a street type of HWY or add highway to the street name field and leave the street type blank. For example, U.S. Highway 421 could be entered as follows:

Prefix/ Name/ Suffix:*	<input type="text" value="US 421"/>	Street Type:	<input type="text" value="HWY"/>
Prefix/ Name/ Suffix:*	<input type="text" value="US HIGHWAY 421"/>	Street Type:	<input type="text"/>

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**.



Adding and Updating Streets (continued)

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

NCVTS -> Vehicle Tax -> Maintain Street Dictionary[?]

Prefix: Suffix:

Search By Street Name:

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.

Prefix:

Street Name: *

Suffix:

Street Type:

5. Click the **Submit** button.

The record is added to your Street Dictionary.

6. Click the **Edit** link.

Search Count : 1

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

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

The record is modified in your Street Dictionary.



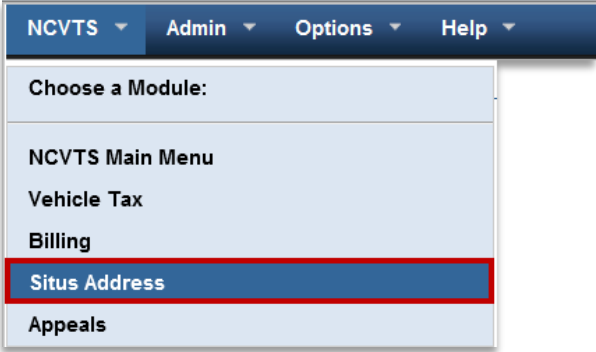
If you have added an abstract to your service cart that needs address validation, you have a running list of addresses that you need to add to your Street Dictionary and/or Situs Repository.

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

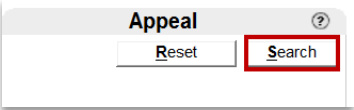
1. From the **NCVTS** menu, select **Situs Address**.



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.

Situs Search Results

County Address ID	St #	Prefix	Street Name	Street Type	Suffix	Unit #	City	Tax District
18335	1404							DURHAM COUNTY,PARKWOOD,CAPITAL FINANCE
18334	1-99999							DURHAM,LEBANON,CAPITAL FINANCE
18333	1-9999							DURHAM COUNTY,DURHAM,CAPITAL FINANCE
18332	1-99999							DURHAM COUNTY,DURHAM,CAPITAL FINANCE
18331	1-99999							DURHAM COUNTY,DURHAM,CAPITAL FINANCE
18330	1-9999							DURHAM COUNTY,REDWOOD,CAPITAL FINANCE
18329	1607	S	MINERAL SPRINGS	RD				DURHAM COUNTY,DURHAM,CAPITAL FINANCE
18328	1625	S	MINERAL SPRINGS	RD				DURHAM COUNTY,DURHAM,CAPITAL FINANCE
18327	204-208		NEW CASTLE	PL				DURHAM COUNTY,CHAPEL HILL,CAPITAL FINANCE

Callout box: Last County Address ID used, County Address ID 18336 should be used for the next County Address ID

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 Updating 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.

Exercise Steps

1. From the **Admin** menu, select **Add Situs Address**.
2. Type and select values to define a new street address in NCVTS.

NCVTS -> Vehicle Tax -> Add/Edit Address											
Street #:	Number	Range	Prefix/Name/Suffix:	MAINE	Street Type:	CT	Unit #:	City:	GREENSBORO	ZIP:	27408
County Address ID:	587893	OR	999		Record Type:	Situs	Parity:	Effective Start Date:	1/17/2013	Effective End Date:	

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

Edit Tax Districts:

- FIRE DISTRICT 14
- FIRE DISTRICT 28
- FIRE SERV DIST 2
- FIRE SERV DIST 3
- GIBSONVILLE
- GIBSONVILLE RURAL
- GRAHAM
- GREENS SCH SPEC
- GREENSBORO**
- GREENSBORO SCH
- GUIL RAND HWY DIST
- GUILFORD**
- GUILFORD COLL FIRE
- GUIL-RAND FIRE
- GUIL-RAND FPSD
- HIGH POINT
- HIGH PT HWY DIST
- HIGH PT SCH
- HIGH PT SCH SPEC
- HORNEYTOWN FIRE

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

i The address start date must be before the abstract is created.

👉 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 Updating Situs Addresses (continued)

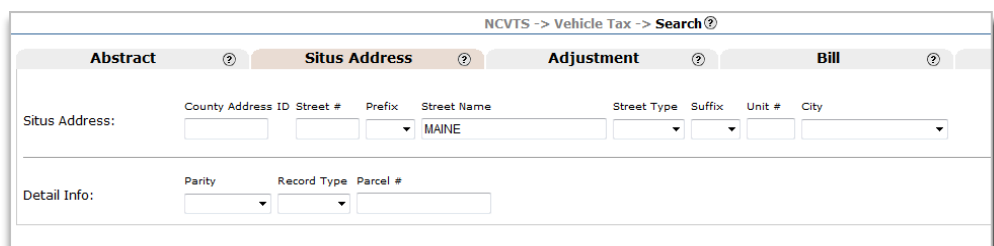
4. Click the **Submit** button.

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**.



The screenshot shows a web browser window titled "NCVTS -> Vehicle Tax -> Search". The browser has four tabs: "Abstract", "Situs Address" (which is selected and highlighted in orange), "Adjustment", and "Bill". Below the tabs is a search form. The "Situs Address:" section contains the following fields: "County" (text input), "Address ID" (text input), "Street #" (text input), "Prefix" (dropdown menu with "MAINE" selected), "Street Name" (text input), "Street Type" (dropdown menu), "Suffix" (dropdown menu), "Unit #" (text input), and "City" (dropdown menu). Below this is the "Detail Info:" section with "Parity" (dropdown menu), "Record Type" (dropdown menu), and "Parcel #" (text input).

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.

The screenshot shows a web interface with several tabs: Abstract, Situs Address (selected), Adjustment, Bill, and Appeal. Below the tabs are search fields for County Address ID, Street #, Prefix (dropdown with 'MAIN' selected), Street Name, Street Type (dropdown), Suffix (dropdown), Unit #, and City. There is also a 'Detail Info' section with fields for Parity, Record Type, and Parcel #. A 'Reset' button and a 'Search' button (highlighted with a red box) are located in the top right corner.

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.

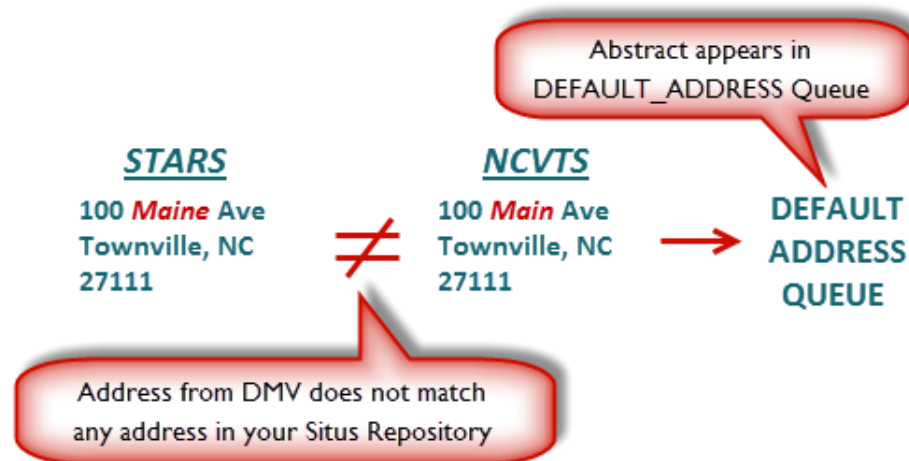
The screenshot shows a web form for adding or editing an address. At the top right, there are four buttons: 'Create Alias', 'Delete', 'Submit', and 'Cancel'. The 'Create Alias' button is highlighted with a red box. Below the buttons is a form with several fields: 'Street #' (with 'Number' and 'Range' sub-fields), 'Prefix/Name/Suffix', 'Street Type', 'Unit #', 'City', 'ZIP', 'County Address ID', 'Parcel #', 'Record Type', 'Situs', 'Party', 'Effective Start Date', and 'Effective End Date'. The 'Prefix/Name/Suffix' field contains 'E MAINE' and the 'Effective Start Date' is set to '2/28/2013'.

- 6. Click the **Submit** button.

The alias is created.

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.



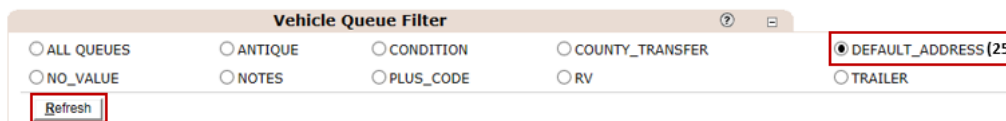
i Addresses in your Situs repository have an effective start and end date. If an address is no longer in effect, it will not validate. Also, if the address in your Situs repository has the four digit extension on the zip code and the DMV address does not, it will not validate.



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** or **Group 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.

Processing Abstracts from the DEFAULT_ADDRESS Queue (continued)

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

Data Summary ? Export to CSV

Export Value Lookup Notes **Edit** Transfer To None Assign Selected Items To User:

	1	2	3	4	5	6	7	8	9
<input type="checkbox"/>	Assigned To	Abstract #	Tax District	DMV Situs Address	DMV Situs Address2				
<input type="checkbox"/>		0019945261	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	101 LUCAS PARK DR					
<input type="checkbox"/>		0017531167	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	1 CIRCLE APT G					
<input checked="" type="checkbox"/>		0018271671	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	10 VALERIA CT					

The address information displays in a pop-up window.

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

Owner: Abstract #: 0018271671

Validate Address Copy Address

St.House# Unit# Pfx St Name* St Type Sfx
 400 W MARKET ST
 City State Zip Parity
 GREENSBORO NC 27401 Unknown

Address From DMV:
10 VALERIA CT BURLINGTON NC 27215 - 9309

Tax District	Percent
GREENSBORO	100
GUILFORD	100
DOWNTOWN IMPR DIST	100

Address Start Date: 1/1/2000 County Address ID:
 Address End Date: 12/31/9999 Transaction Date: 3/18/2013

- Click the **Validate Address** button.

A pop-up window with matching streets displays.

- 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
<input checked="" type="radio"/>	10			VALERIA	CT		GUILFORD, GIBSONVILLE	27215 9309 BURLINGTON	UNKNOWN
<input type="radio"/>	20			VALERIA	CT		GUILFORD, GIBSONVILLE	27215 9309 BURLINGTON	UNKNOWN
<input type="radio"/>	30			VALERIA	CT		GUILFORD, GIBSONVILLE	27215 9309 BURLINGTON	UNKNOWN

i If you cannot locate the address you are trying to verify, use the county's GIS system or real estate department.

Processing Abstracts from the DEFAULT_ADDRESS Queue (continued)

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

Validate Address Generic Copy Address Clear

St/House# Unit # Pfx St Name* St Type Sfx
10 VALERIA CT

City State Zip Parity
BURLINGTON NC 27215 - 9309 Unknown

Address From DMV:
10 VALERIA CT BURLINGTON NC 27215 - 9309

Tax District	Percent
GIBSONVILLE	100
GUILFORD	100

Address Start Date: 7/1/2012 County Address ID: 24519487
Address End Date: 12/31/9999 Transaction Date: 3/18/2013

Previous Cancel **Submit** Submit & Next Next

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.

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

Processing Abstracts in the COUNTY_TRANSFER Queue

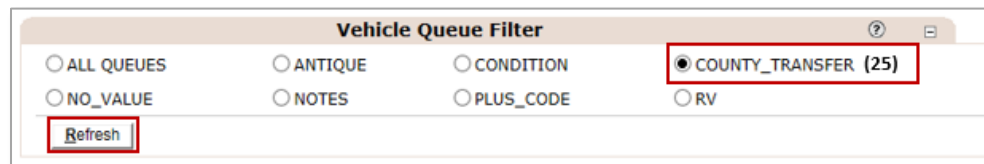
An abstract can be moved from one county to a different county by using the County Transfer functionality. The user selects the county to which they wish to transfer the abstract. The abstract is removed from the source county and sent to the target county with the active default address. County Transfer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



County A receives an abstract showing the vehicle located in County B. County B transferred the abstract to County A and County A needs to accept it.

Exercise Steps

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



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

3. Click the checkbox beside the abstract you want to work, and then click the **Edit** button.
4. Clear the address, and then type the name of the street in the **St. Name** field.
5. Click the **Validate Address** button.

The list of matching addresses displays.

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

The address is validated.

i Abstracts in the COUNTY_TRANSFER queue appear in the DEFAULT_ADDRESS queue as well.

👉 Update the vehicle location in DMV Stars to update the county for the vehicle in question.

Processing Abstracts from the COUNTY_TRANSFER Queue (continued)

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

Owner : [REDACTED] Abstract #: 0018282520

County Transfer:
 Do Nothing
 Accept

St./House#	Unit #	Pfx	St Name*	St Type	Sfx
105			MAIN	ST	

City	State	Zip	Parity
PINEVILLE	NC		Unknown

Address From DMV:
10003 BRISTLEY RD CHARLOTTE NC 28227 - 3676

Tax District	Percent
MECKLENBURG	100
PINEVILLE	100

Address Start Date: 6/1/2009 County Address ID: 4039618
Address End Date: 12/31/9999 Transaction Date: 3/18/2013

The Basket View or Group 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.

NCVTS -> Vehicle Tax -> **Vehicle Tax Queue (Group View)** -> **Maintain Vehicle Abstract** ⓘ

Owner: [REDACTED] Abstract #: 0000294064-2012-2012-0000 RMV

Queues: **DEFAULT_ADDRESS** Status: Received

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

Description: 2001 ACRO TL Prev. Billed Value: Total Assessed Value: \$10,505

Owner Id	ID Number	Name	Mailing Address	Owner Order
676230	DRIVER LICENSE-*****56350	[REDACTED]	6106 CORPORATE PARK DR BROWNS SUMMIT NC 27214-9700	PRIMARY



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.

Exercise Steps

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

Vehicle Queue Filter ⓘ

ALL_QUEUES
 ANTIQUE
 CONDITION
 COUNTY_TRANSFER
 DEFAULT_ADDRESS (25)

NO_VALUE
 NOTES
 PLUS_CODE
 RV
 TRAILER

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

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

Transferring an Abstract to another County (continued)

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

Abstract #	Tax District	DMV Situs Address	DMV Situs Address2	DMV City State	DMV Zip	Notes/Corr	Lessee	Owner
<input type="checkbox"/> 0000500112	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	1003 NORTH ROTARY DRIVE		HIGH POINT NC	27262-3609			
<input type="checkbox"/> 0000397375	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	104 GRANDE AVE		GREENVILLE NC	27834-3136			
<input checked="" type="checkbox"/> 0000690317	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	4238 PIEDMONT PKWY		GREENSBORO NC	27410-8111			
<input type="checkbox"/> 0000431473	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	4238 PIEDMONT PKWY		GREENSBORO NC	27410-8111			
<input type="checkbox"/> 0000581566	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	6833A HARRY CT		BURLINGTON NC	27215-9066			
<input type="checkbox"/> 0000425449	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	7501 HWY 29		BROWN SUMMIT NC	27214-0000			
<input type="checkbox"/> 0000433949	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	940 RIDGEBROOK RD		SPARKS MD	21152-9390			

i 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.



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:

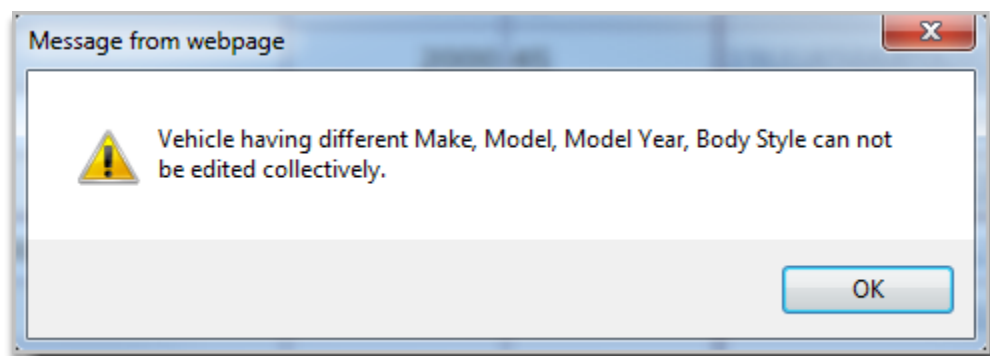
- Open the abstract record.
- Click the **Make Not RFB** button.
- Change the status to **Received**.
- Click the **Submit** button.

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:



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 or **Group 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

Data Summary								
Export		Value Lookup	Notes	Edit	Transfer To	None	Assign Selected Items To User:	
							Assign	
							Assign	
Export to CSV # of Rows 25								
Assign Selected Items To User: [] Assign								
1 2 3 4 5 6 7 8 9 10 ...								
<input type="checkbox"/>	Assigned To	Abstract #	Tax District	DMV Situs Address	DMV Situs Address2	DMV City State	DMV Zip	Notes/Corr
<input type="checkbox"/>		0040919940	GUILFORD, GREENSBORO	113 GREENHAVEN DR		ARCHDALE NC	27263-2945	[] []
<input type="checkbox"/>		0040981035	GUILFORD, GREENSBORO	4835 MCNEILL RD		CLIMAX NC	27233-8211	[] []
<input type="checkbox"/>		0044958346	GUILFORD, GREENSBORO	608 EAGLE RD	APT 3F	GREENSBORO NC	27407-5355	[] []
<input type="checkbox"/>		0045007716	GUILFORD, GREENSBORO	1724 NC HIGHWAY 62 W		HIGH POINT NC	27263-9416	[] []
<input type="checkbox"/>		0041988718	GUILFORD, GREENSBORO	1724 NC HIGHWAY 62 W		HIGH POINT NC	27263-9416	[] []
<input checked="" type="checkbox"/>		0040911516	GUILFORD, GREENSBORO	1511 BLANDWOOD DR		HIGH POINT NC	27260-8201	[] []
<input checked="" type="checkbox"/>		0040911327	GUILFORD, GREENSBORO	1511 BLANDWOOD DR		HIGH POINT NC	27260-8201	[] []
<input checked="" type="checkbox"/>		0040911455	GUILFORD, GREENSBORO	1511 BLANDWOOD DR		HIGH POINT NC	27260-8201	[] []

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.

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

3 Rows Selected

St./House# Unit # Pfx St Name* St Type Sfx

City State Zip Parity

Tax District	Percent
Address Start Date:	County Address ID:
Address End Date:	Transaction Date:

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

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

Processing Multiple Abstracts (continued)

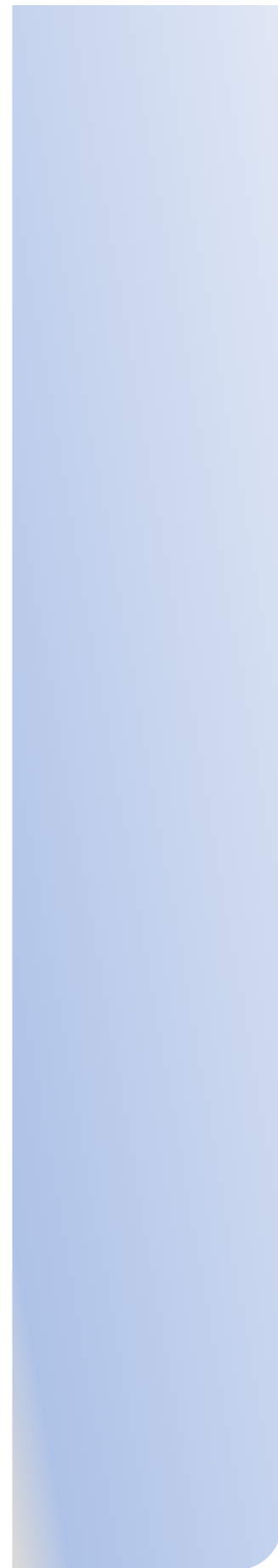
10. Select the radio button for the desired address.

<input type="radio"/>	405		BLANDWOOD AVE	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	27401 2705 GREENSBORO	UF
<input type="radio"/>	406		BLANDWOOD AVE	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	27401 GREENSBORO	UF
<input type="radio"/>	407		BLANDWOOD AVE	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	27401 2756 GREENSBORO	UF
<input type="radio"/>	408		BLANDWOOD AVE	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	27401 2706 GREENSBORO	UF
<input type="radio"/>	409		BLANDWOOD AVE	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	27401 2705 GREENSBORO	UF
<input type="radio"/>	410		BLANDWOOD AVE	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	27401 2706 GREENSBORO	UF
<input type="radio"/>	412		BLANDWOOD AVE	GUILFORD, GREENSBORO, DOWNTOWN IMPR DIST	27401 GREENSBORO	UF
<input type="radio"/>	1506		BLANDWOOD DR	GUILFORD, HIGH POINT	27260 8202 HIGH POINT	UF
<input type="radio"/>	1507		BLANDWOOD DR	GUILFORD, HIGH POINT	27260 8201 HIGH POINT	UF
<input type="radio"/>	1507	NEAR	BLANDWOOD DR	GUILFORD, HIGH POINT	27260 8201 HIGH POINT	UF
<input type="radio"/>	1510		BLANDWOOD DR	GUILFORD, HIGH POINT	27260 8202 HIGH POINT	UF
<input type="radio"/>	1510	NEAR	BLANDWOOD DR	GUILFORD, HIGH POINT	27260 8202 HIGH POINT	UF
<input checked="" type="radio"/>	1511		BLANDWOOD DR	GUILFORD, HIGH POINT	27260 8201 HIGH POINT	UF
<input type="radio"/>	1512		BLANDWOOD DR	GUILFORD, HIGH POINT	HIGH POINT	UF
<input type="radio"/>	1512	A	BLANDWOOD DR	GUILFORD, HIGH POINT	HIGH POINT	UF

Close Submit Use Default Address

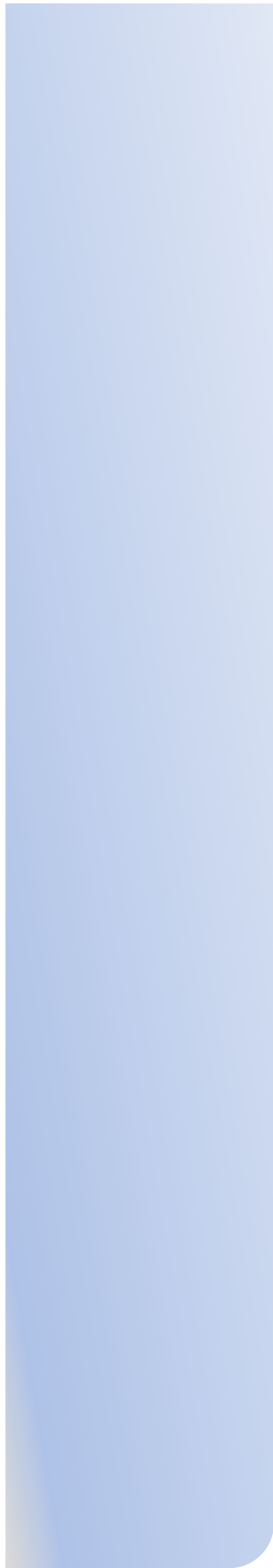
11. Click the **Submit** button, and then click the **Submit** button again.

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



MODULE 4:

CONFIGURATION AND MAINTENANCE



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:

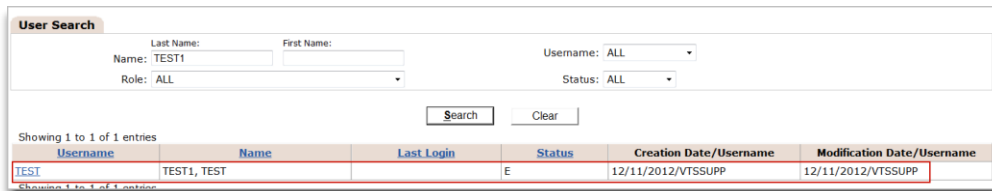
Role	Role Description
County admin role	This role will be responsible for adding county users, maintaining County configuration, Tax Schedules, Maintenance of Situs Address, etc.
Vehicle tax admin role	This role will be responsible for maintenance of Mass Assignment, View Manager Queue, Approve Adjustments, viewing and editing RMV abstracts and processing of queues.
Vehicle record edit role	This role will be responsible for maintenance of registered motor vehicle 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

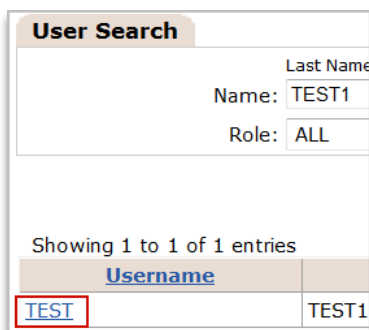
1. From the **Admin** menu, select **User Management** then **Search User**



2. Enter the name of the user provided to you:
3. Click the **Search** button.
4. The User Search Results displays.

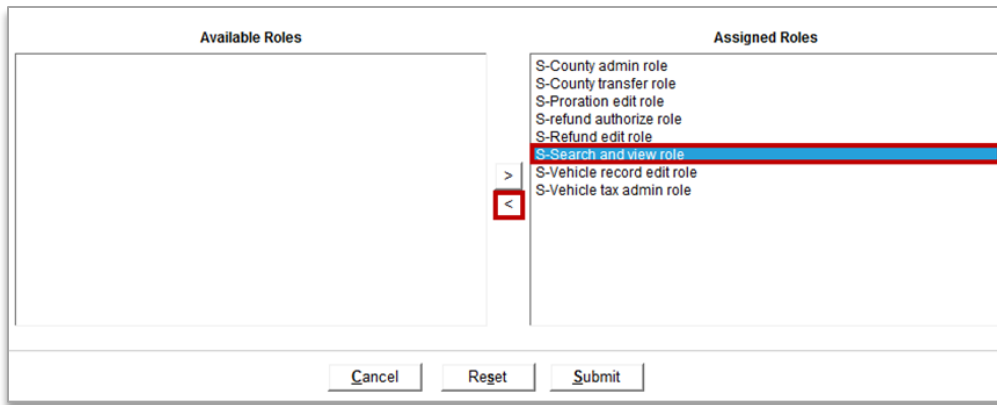


5. Click the **Username** link.



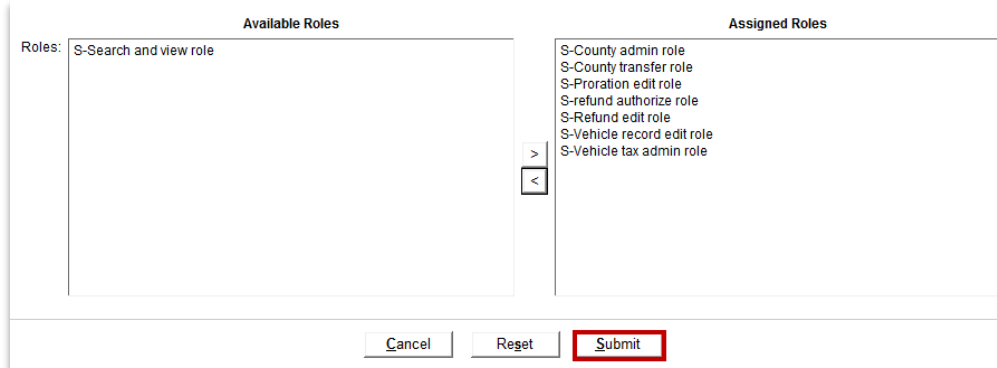
Searching for and Editing an Existing User Record (continued)

6. The Edit User page displays.
7. Click the **S-Refund edit role** Assigned Role.
8. Click the left arrow to remove the role from the user's assigned role.



The screenshot shows a window with two columns: "Available Roles" on the left and "Assigned Roles" on the right. The "Assigned Roles" list contains: S-County admin role, S-County transfer role, S-Proration edit role, S-refund authorize role, S-Refund edit role, S-Search and view role (highlighted in red), S-Vehicle record edit role, and S-Vehicle tax admin role. A red box highlights the left arrow button between the columns. At the bottom are buttons for "Cancel", "Reset", and "Submit".

9. Click the **Submit** button.

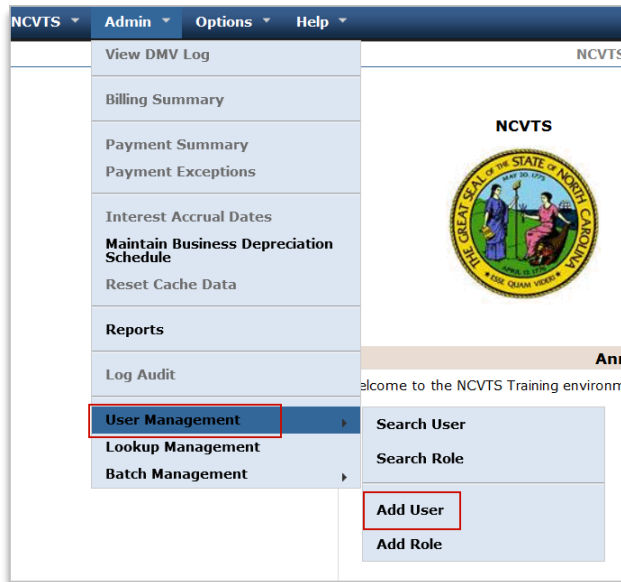


The screenshot shows the same window as before, but now the "S-Search and view role" has moved to the "Available Roles" list. The "Assigned Roles" list now contains: S-County admin role, S-County transfer role, S-Proration edit role, S-refund authorize role, S-Refund edit role, S-Vehicle record edit role, and S-Vehicle tax admin role. The "Submit" button at the bottom is highlighted with a red box.

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.

A screenshot of the 'Add User' form in the NCVTS application. The breadcrumb trail at the top reads 'NCVTS -> Main Menu -> Admin -> Add User'. The form is titled 'User Info' and contains several input fields: 'Last Name*', 'First Name*', 'Username*', 'Phone', and 'Fax'. The 'Username*' field contains the text 'JOHNDOE1' and is highlighted with a red box. To the right of the 'Username*' field is a 'Validate NCID' button, also highlighted with a red box. Below the 'Username*' field is a 'Status' dropdown menu set to 'ENABLED'. The 'Phone' field is represented by three input boxes followed by an 'x' and another input box. The 'Fax' field is represented by three input boxes.

3. Click the **Validate NCID** button.
4. Select the following roles (Hold CTRL key and click to select multiple), then click the right arrow to add them to the Assigned Roles.

A screenshot of the role selection interface. It is divided into two main sections: 'Available Roles' and 'Assigned Roles'. The 'Available Roles' section contains a list of roles, each with a checkbox and a right-pointing arrow button. The roles listed are: 'S-Appeals Manager', 'S-Approve adjustments', 'S-County admin role', 'S-County transfer role', 'S-Proration edit role', 'S-Refund edit role', 'S-Refund Role', 'S-Scan Documents', 'S-Search and view role', 'S-TAC Refund', 'S-TSS Proration', 'S-Vehicles record edit role', 'S-Vehicle tax admin role', and 'S-View dMv Queue'. The 'S-Refund Role' and 'S-Search and view role' are highlighted with blue bars. The right-pointing arrow button for 'S-Refund Role' is highlighted with a red box. The 'Assigned Roles' section is currently empty.

Creating a New User (continued) INSTRUCTOR DEMO ONLY

5. Click the **Submit** button.



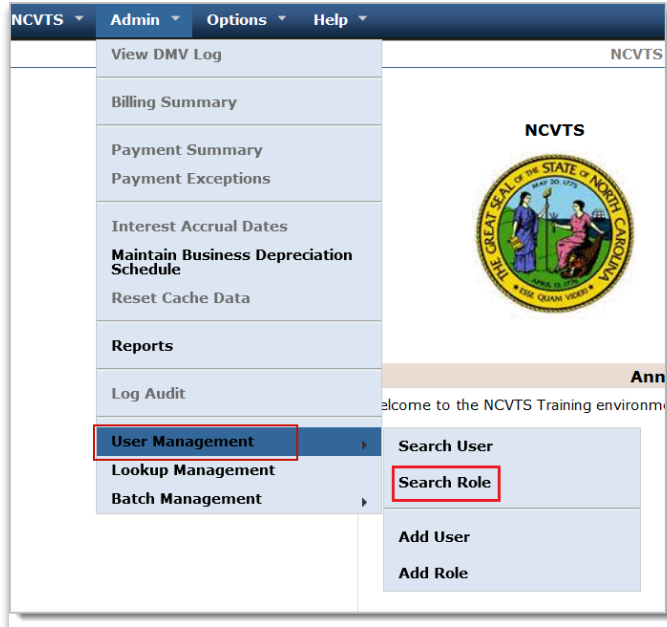
The screenshot shows a web interface for assigning roles to a user. It features two main panels: 'Available Roles' on the left and 'Assigned Roles' on the right. The 'Available Roles' panel contains a list of roles: S-Appeals Manager, S-Approve adjustments, S-County admin role, S-County transfer role, S-Refund Role, S-Scan Documents, S-TAC Refund, S-TSS Proration, S-Vehicle tax admin role, and S-View dMV Queue. The 'Assigned Roles' panel contains a list of roles: S-Proration edit role, S-Refund edit role, S-Search and view role, and S-Vehicle record edit role. Between the two panels are two small buttons: a right-pointing arrow (>) and a left-pointing arrow (<). At the bottom of the interface are three buttons: 'Cancel', 'Reset', and 'Submit'. The 'Submit' button is highlighted with a red rectangular border.

Available Roles	Assigned Roles
S-Appeals Manager	S-Proration edit role
S-Approve adjustments	S-Refund edit role
S-County admin role	S-Search and view role
S-County transfer role	S-Vehicle record edit role
S-Refund Role	
S-Scan Documents	
S-TAC Refund	
S-TSS Proration	
S-Vehicle tax admin role	
S-View dMV Queue	

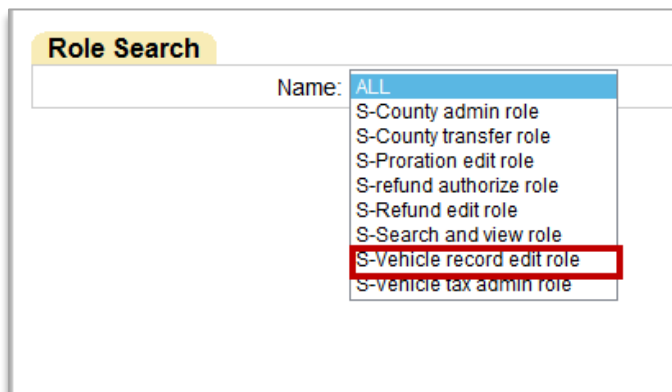
Buttons: Cancel, Reset, **Submit**

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.

Role Name	
Vehicle record edit role	STAFF/S

The Edit Role page displays showing the Assigned Rights for the role.

Create a Role

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

Add Role

Name:*

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

The screenshot shows the 'Add Role' dialog box with two panes: 'Available Rights' and 'Assigned Rights'. The 'Available Rights' pane contains a list of permissions such as 'BLCL-Payment - View payment transaction detail', 'BLCL-Refund - Authorize refund', and 'BLCL-Situs - Add address'. The 'Assigned Rights' pane is currently empty. A right-pointing arrow button is visible between the two panes. At the bottom, there are 'Cancel', 'Reset', and 'Submit' buttons, with 'Submit' being highlighted.

4. Click the **Submit** button.

This screenshot shows the 'Add Role' dialog box after several rights have been assigned. The 'Assigned Rights' pane now contains a list of permissions including 'BLCL-Appeals - View appeal detail', 'BLCL-Assessment - View abstract change history', and 'BLCL-Billing - Simple search'. The 'Submit' button at the bottom is highlighted with a red box.

Your role has been created.



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
- ▶ Upload Situs file
- ▶ Download Situs file
- ▶ View and reassign logs

Creating an Assignment Rule for Mass Assignment INSTRUCTOR DEMONSTRATION ONLY

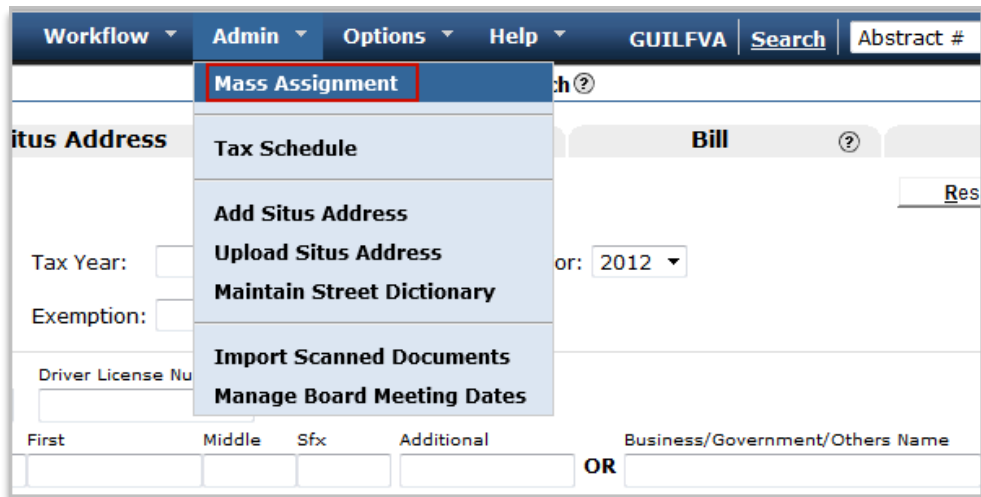
i Mass Assignment Rules apply only during the DMV Upload process. New and changed Mass Assignment Rules do not change the user assignment of existing abstracts.

A Mass Assignment Rule is 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.

Exercise Steps

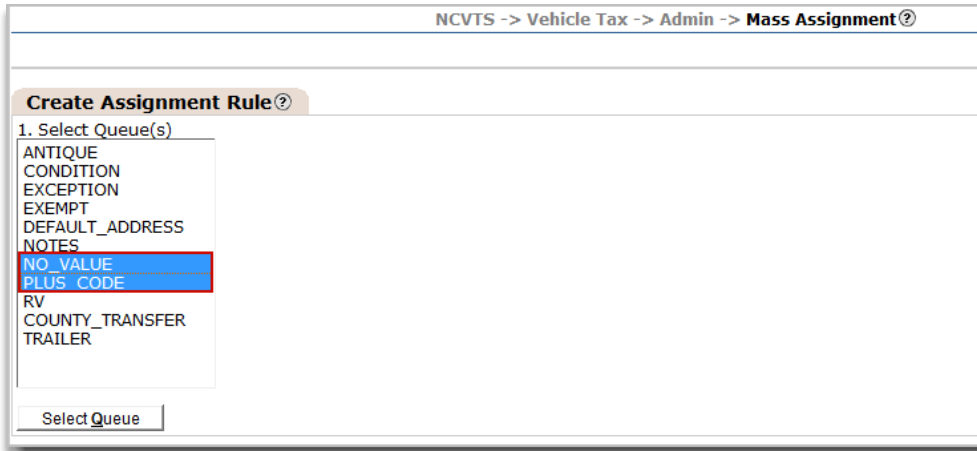
1. From the **Admin** menu, select the **Mass Assignment** option.



The Mass Assignment page displays.

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

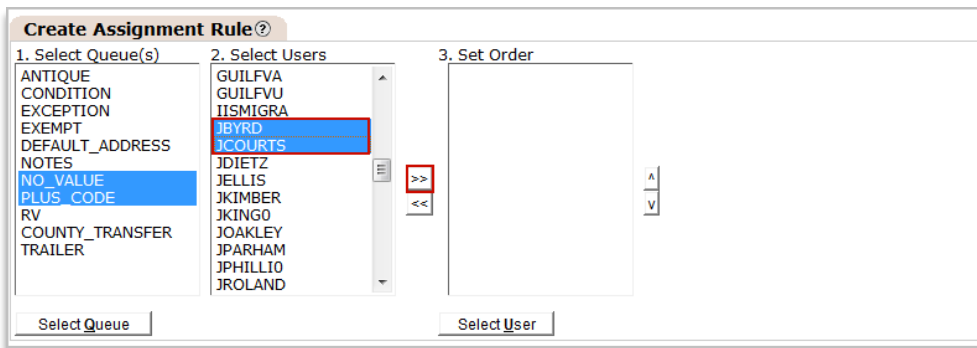
- Under **Select Queues**, click the name(s) of the queue(s) for which you want a mass assignment rule.




- Click the **Select Queue** button.

The queues are selected and steps to select users display.

- Click the name(s) of the user(s) to be assigned abstracts during the DMV Upload, and then click the right >> arrows 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 up \wedge or down \vee arrows 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.

Create Assignment Rule ?															
1. Select Queue(s)	2. Select Users	3. Set Order	4. Assign Percentages												
ANTIQUE CONDITION EXCEPTION EXEMPT DEFAULT_ADDRESS NOTES NO_VALUE PLUS_CODE RV COUNTY_TRANSFER TRAILER	ABROOKS AEURY AJOHNSO1 AMYRICK AROGERS ATHOMAS1 BCHAVIS BKINGO BMCGINN BNEWMAN CBOURGE CEVANSO CFERREL	JBYRD JCOURTS	<table border="1"><thead><tr><th>Total</th><th>0</th><th>100%</th></tr></thead><tbody><tr><td>JBYRD</td><td>0</td><td>50 %</td></tr><tr><td>JCOURTS</td><td>0</td><td>50 %</td></tr><tr><td>Allocation Left</td><td>0</td><td>0%</td></tr></tbody></table> Add Assignment Rule	Total	0	100%	JBYRD	0	50 %	JCOURTS	0	50 %	Allocation Left	0	0%
Total	0	100%													
JBYRD	0	50 %													
JCOURTS	0	50 %													
Allocation Left	0	0%													

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

Create Assignment Rule ?															
1. Select Queue(s)	2. Select Users	3. Set Order	4. Assign Percentages												
ANTIQUE CONDITION EXCEPTION EXEMPT DEFAULT_ADDRESS NOTES NO_VALUE PLUS_CODE RV COUNTY_TRANSFER TRAILER	ABROOKS AEURY AJOHNSO1 AMYRICK AROGERS ATHOMAS1 BCHAVIS BKINGO BMCGINN BNEWMAN CBOURGE CEVANSO CFERREL	JBYRD JCOURTS	<table border="1"><thead><tr><th>Total</th><th>0</th><th>100%</th></tr></thead><tbody><tr><td>JBYRD</td><td>0</td><td>50 %</td></tr><tr><td>JCOURTS</td><td>0</td><td>50 %</td></tr><tr><td>Allocation Left</td><td>0</td><td>0%</td></tr></tbody></table> Add Assignment Rule	Total	0	100%	JBYRD	0	50 %	JCOURTS	0	50 %	Allocation Left	0	0%
Total	0	100%													
JBYRD	0	50 %													
JCOURTS	0	50 %													
Allocation Left	0	0%													

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

i NCVTS has been updated to not allow counties to update or maintain tax rates after July 1. Please contact DOR if you need assistance through the customer portal or by emailing ncvts@ncdor.gov.

The screenshot shows the 'Tax Schedule' page in NCVTS. At the top, the breadcrumb navigation reads 'NCVTS -> Vehicle Tax -> Admin -> Tax Schedule'. The main section is titled 'Search Tax Schedule' and contains three dropdown menus: 'Tax Rate Year' (set to 2012), 'Tax District' (set to KERNERSVILLE), and 'Rate Type'. Below these are 'Search' and 'Add New' buttons. A callout points to the search area: 'Select desired values and click the Search button'. Below the search area is a 'Copy Search Results' section with a 'To:' dropdown (set to 2012) and a 'Copy Forward' button. A callout explains: 'Adds districts with fees/percentages from Search Results to selected year's schedule'. Another callout points to the 'Add New' button: 'Use to define a rate or fee that does not exist in a tax schedule'. Below this is a 'Results' table with 99 rows. The table has columns: 'Edit', 'Tax Rate Year', 'Tax District', 'Rate Type', 'Rate', and 'Rate Flag'. Two rows are visible: one for 'TAX' with a rate of 0.497500 and a 'Percentage' flag, and one for 'VEHICLE FEE' with a rate of 5.000000 and a 'Flat' flag. A callout points to the 'EDIT' button in the first row: 'Edit an existing tax schedule entry'.

Edit	Tax Rate Year	Tax District	Rate Type	Rate	Rate Flag
EDIT	2012	KERNERSVILLE	TAX	0.497500	Percentage
EDIT	2012	KERNERSVILLE	VEHICLE FEE	5.000000	Flat

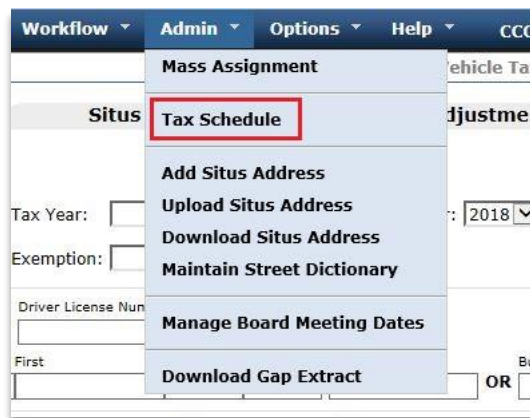
Searching for Existing Tax Schedule Entries INSTRUCTOR DEMONSTRATION ONLY

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.

Exercise 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**.

A screenshot of the 'Search Tax Schedule' form. It features three dropdown menus: 'Tax Rate Year' (set to 2012), 'Tax District' (set to KERNERSVILLE), and 'Rate Type' (blank). Below the dropdowns are two buttons: 'Search' and 'Add New'.

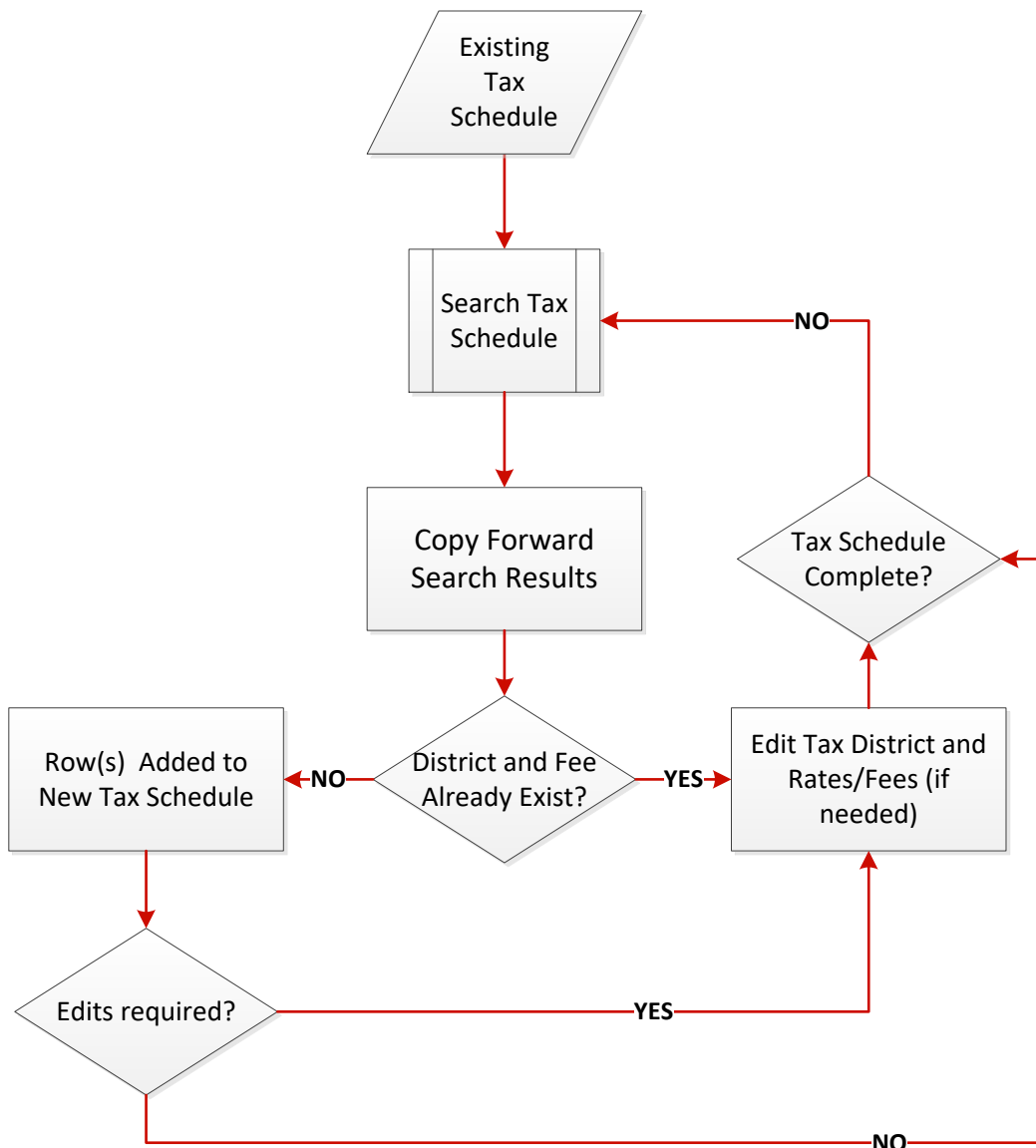
3. Click the **Search** button.

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

 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.

Copying Existing Tax Schedule Entries to Create New Entries INSTRUCTOR 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.



Editing Existing Tax Schedule Entries INSTRUCTOR DEMONSTRATION ONLY

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

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 then use the Edit button to modify the information.

Exercise Steps

1. From the **Admin** menu, select **Tax Schedule**.
2. From the **Search Tax Schedule** page, select the tax district you need to edit and click **Search**.

Search Tax Schedule

Tax Rate Year: 2018 Tax District: KERNERSVILLE Rate Type:

Search Add New

The tax schedule entries matching your search display.

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

Results

Rows: 99 Update

Edit	Tax Rate Year	Tax District	Rate Type	Rate	Rate Flag
EDIT	2018	KERNERSVILLE	TAX	0.570000	Percentage
EDIT	2018	KERNERSVILLE	VEHICLE FEE	5.000000	Flat

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

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

Maintain Tax Schedule

Tax Rate Year #: 2018 Tax District #: KERNERSVILLE Rate Type #: TAX Rate Flag #: Percentage

Rate #: 0.5700

Cancel Submit

Results

Rows: 99 Update

Edit	Tax Rate Year	Tax District	Rate Type	Rate	Rate Flag
EDIT	2018	KERNERSVILLE	TAX	0.570000	Percentage
EDIT	2018	KERNERSVILLE	VEHICLE FEE	5.000000	Flat

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 **Admin** menu, select **Tax Schedule**.
2. 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.

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



4. Click the **Submit** button.

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

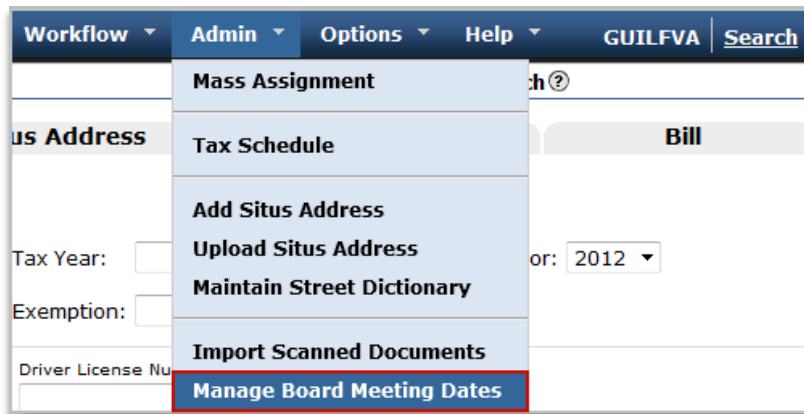
 It is very important to make sure everything is correct before clicking Submit.

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.

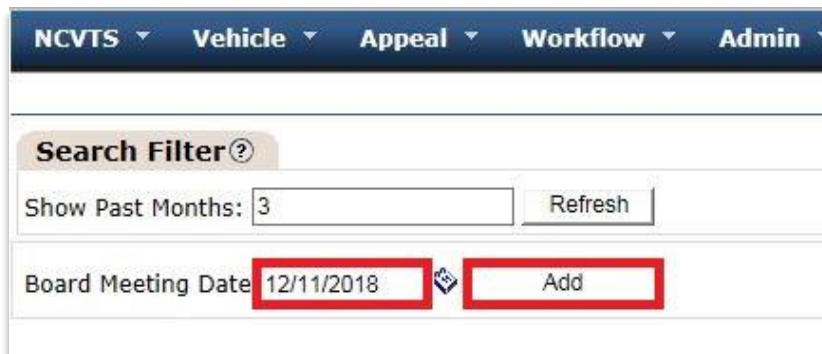
Exercise Steps

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.

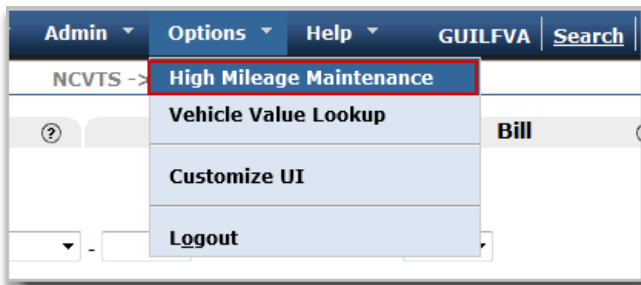
The board meeting date is added and is available for selection on pending refunds.

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 by DOR.

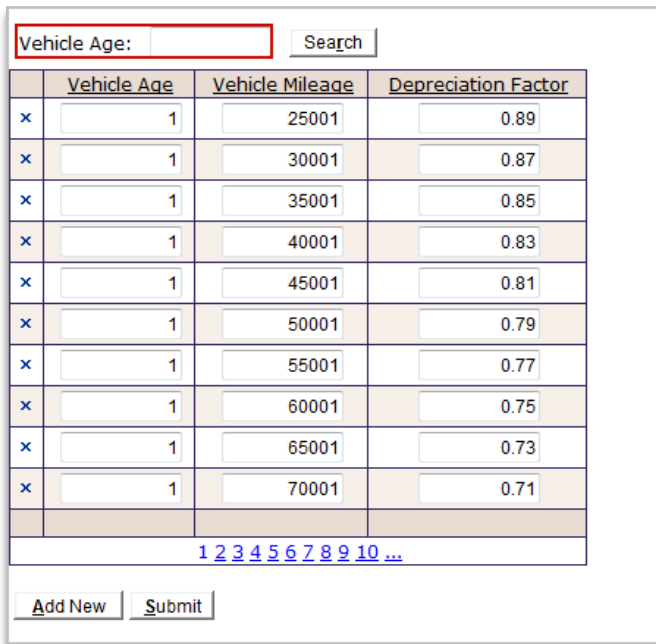
Exercise Steps

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



The High Mileage Schedule displays.

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



i 15,000 miles per year is considered average mileage. A vehicle must exceed this by 10,000 miles to receive a 10% adjustment. A 2% adjustment is then added for each additional 5,000 miles.

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.

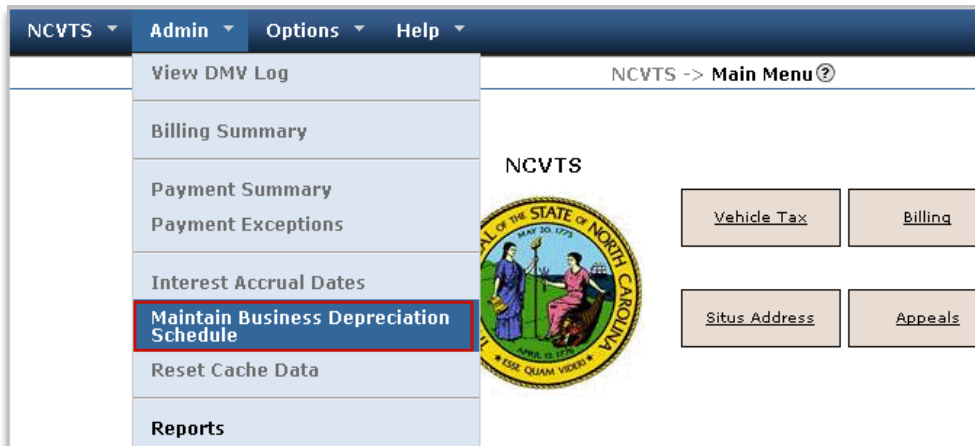
Vehicle Age: <input type="text" value="5"/> <input type="button" value="Search"/>			
	Vehicle Age	Vehicle Mileage	Depreciation Factor
x	<input type="text" value="5"/>	<input type="text" value="85001"/>	<input type="text" value="0.89"/>
x	<input type="text" value="5"/>	<input type="text" value="90001"/>	<input type="text" value="0.87"/>
x	<input type="text" value="5"/>	<input type="text" value="95001"/>	<input type="text" value="0.85"/>
x	<input type="text" value="5"/>	<input type="text" value="100001"/>	<input type="text" value="0.83"/>
x	<input type="text" value="5"/>	<input type="text" value="105001"/>	<input type="text" value="0.81"/>
x	<input type="text" value="5"/>	<input type="text" value="110001"/>	<input type="text" value="0.79"/>
x	<input type="text" value="5"/>	<input type="text" value="115001"/>	<input type="text" value="0.77"/>
x	<input type="text" value="5"/>	<input type="text" value="120001"/>	<input type="text" value="0.75"/>
x	<input type="text" value="5"/>	<input type="text" value="125001"/>	<input type="text" value="0.73"/>
x	<input type="text" value="5"/>	<input type="text" value="130001"/>	<input type="text" value="0.71"/>
1 2 3			

Viewing a Depreciation Schedule INSTRUCTOR DEMONSTRATION ONLY

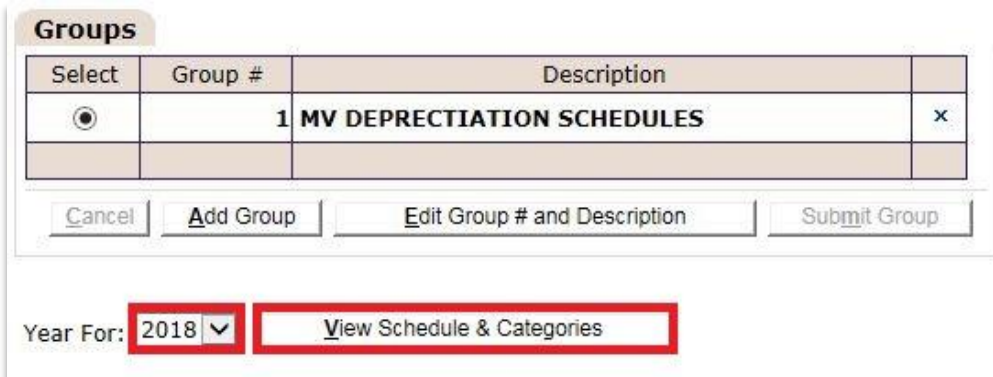
Depreciation Schedules are now standardized in NCVTS. With appropriate permissions, you can view a Depreciation Schedule, but only users with State-level authority can edit them.

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**.

Year For:

Schedules in Group

Select	Schedule	Life Years	
<input checked="" type="radio"/>	B	5	x
<input type="radio"/>	B	8	x
<input type="radio"/>	B	10	x
<input type="radio"/>	B	12	x
<input type="radio"/>	B	20	x

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

Year Acquired	% Good
2017	<input type="text" value="80.00"/>
2016	<input type="text" value="61.00"/>
2015	<input type="text" value="42.00"/>
2014	<input type="text" value="25.00"/>
PRIOR	<input type="text" value="25.00"/>

Uploading a Situs File

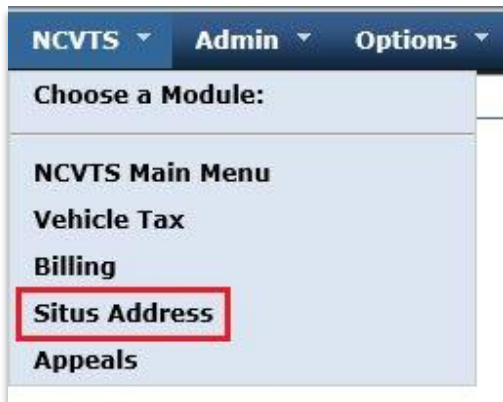
INSTRUCTOR DEMONSTRATION ONLY

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/or 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.

Exercise Steps

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



2. From the **Admin** menu, select **Upload Situs Address**.



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

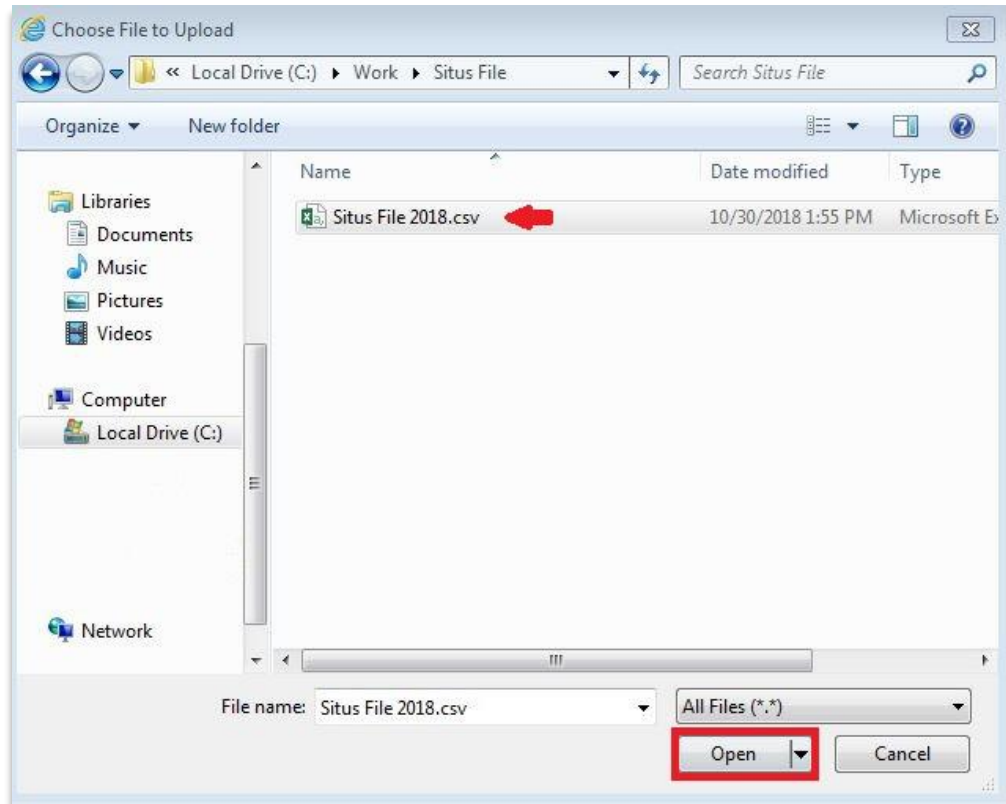


For more information on how to build a situs file and on the situs file format, please refer to appendix C.

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

Uploading a Situs File (continued) INSTRUCTOR DEMONSTRATION ONLY

3. Click the **Browse** button, navigate to the file, and select it. (Note: File must be in .csv format and zipped to upload.)



4. Click the **Upload** button.



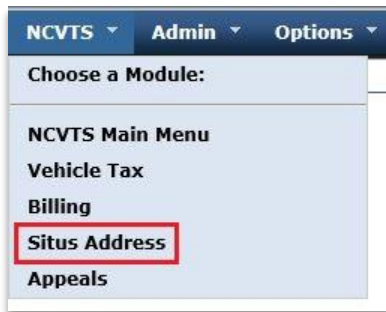
Once you upload your situs file, it is recommended to review the NCVTS logs for errors. Refer to the Viewing and Reassigning log section for instructions on how to access and review these logs.

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.

Exercise 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.




Downloading a Situs File (continued) INSTRUCTOR DEMONSTRATION ONLY

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.

Exercise Steps

1. From the **Workflow** menu, select **Reassign Log**.



2. Enter or select the desired search criteria and click the **Refresh** button.



The logs display.

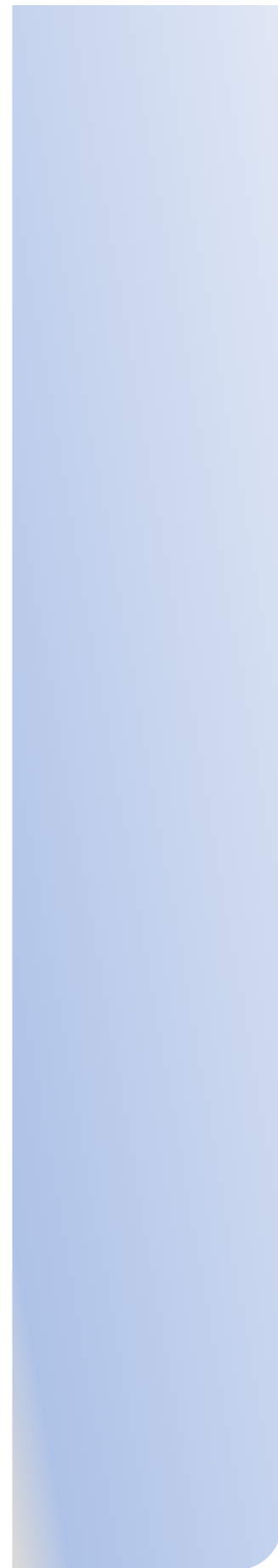
Viewing and Reassigning Logs (continued) INSTRUCTOR DEMO ONLY

3. Select a checkbox to assign the log to a user, and then select the user in the **Reassign User** column.

	Assigned Date	Status	Type	Log
<input checked="" type="checkbox"/>	10/27/2018	ACTIVE	Situs Upload	Situs Upload - Record Error Code 4: Incorrect Type: N. County Address ID: NULL. Effective Date: NULL. Tax Districts: NNNNNNNNNN.

4. 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.



MODULE 5: NCVTS REPORTS



Chapter 1: NCVTS Reports Overview

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.

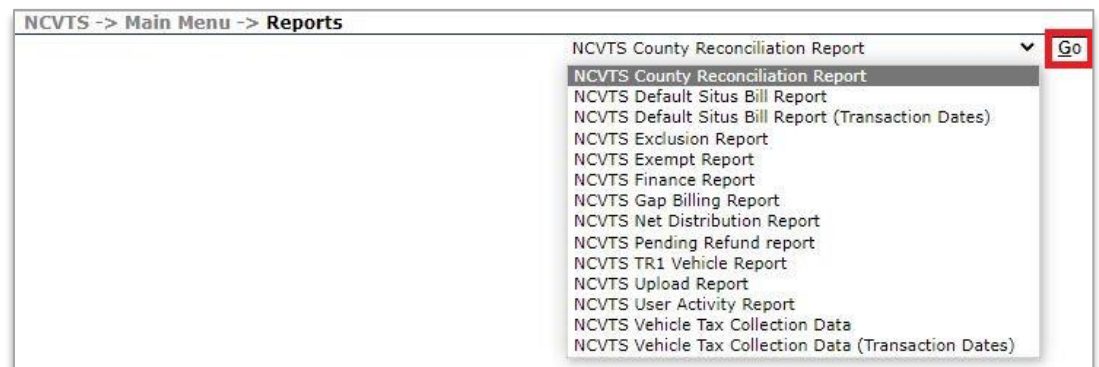
Accessing NCVTS Reports

Exercise Steps

1. From the **NCVTS** menu, select the **NCVTS Main Menu**.
2. From the **Admin** menu, select the **Reports** option.



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



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: <ul style="list-style-type: none"> ▶ Adj Pending ▶ Billed ▶ Not Billable ▶ Not RFB ▶ Received ▶ RFB ▶ Voided
Bill Paid Status	<ul style="list-style-type: none"> ▶ 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).



The screenshot shows a web application interface for generating reports. At the top, there is a navigation bar with 'NCVTS', 'Admin', 'Options', and 'Help' menus, and a search bar. Below this, the page title is 'NCVTS -> Main Menu -> Reports' and the report name is 'NCVTS County Net Collection Report'. The main form area contains several parameters: 'Select Renewal Date Fiscal Year' with a dropdown menu set to '2018 - 2019'; 'Select Renewal Date Time Period' with a dropdown menu set to '<Select a Value>'; 'Select Abstract Year For' with a list of years from 2012 to 2019, where 2018 is selected; and 'Select Tax Jurisdiction' with a dropdown menu. A red 'View Report' button is located in the top right corner of the form area.

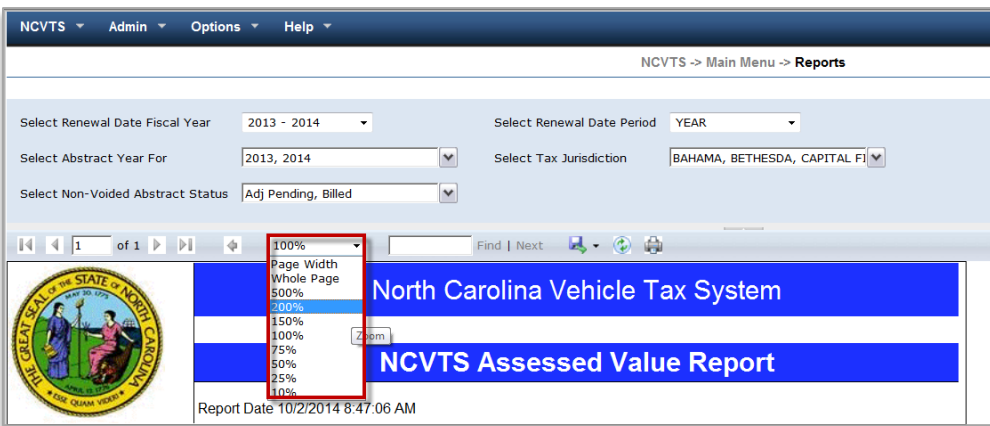
2. Click the **View Report** button.
3. Your report will display based on the report parameters you set.

Navigating NCVTS Reports

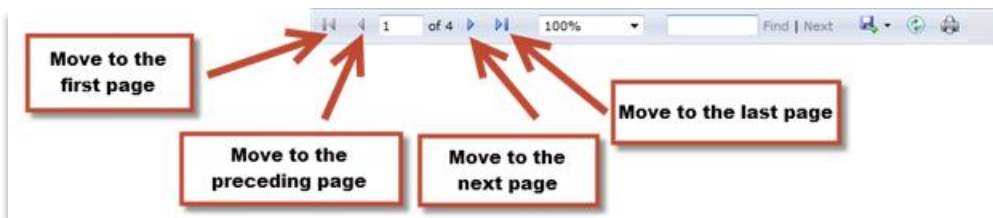
After a user runs a report, the report details will display in the reports viewer window. Users can review report details, change report view settings, sort and filter reports, export reports and print reports from the Reports Viewer window.

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.

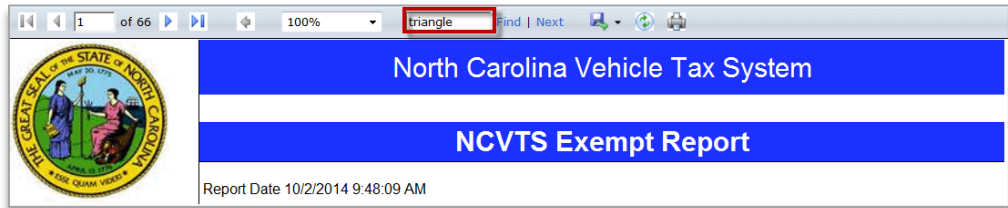


i If you change the report parameters and click the refresh button, the report will still display information for the original parameters that were set.

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

Navigating NCVTS Reports (continued)

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



- Click the Find hyperlink.

Abstract #	Owner Name	Description	County	Plate Number	Exempt Code	Unbilled Value
0002225628-2013-2013-0000	TRIANGLE RESIDENTIAL	2005 FORD CUTAWAY VAN TK			CHARITABLE-OWNED	\$6,930.00

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

Abstract #	Owner Name	Description	County	Plate Number	Exempt Code	Unbilled Value
0002225628-2013-2013-0000	TRIANGLE RESIDENTIAL	2005 FORD CUTAWAY VAN TK			CHARITABLE-OWNED	\$6,930.00
0002349054-2013-2013-0000	TRIANGLE RESIDENTIAL	2005 FORD CUTAWAY VAN TK			CHARITABLE-OWNED	\$6,930.00

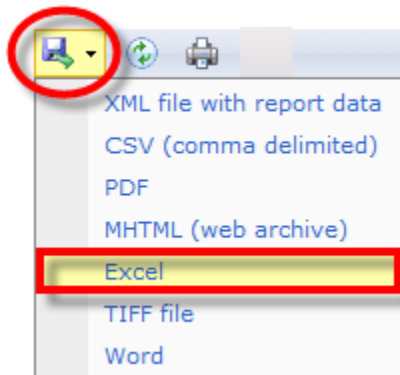
Exporting NCVTS Reports

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 disk icon and select the format of your choice.



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

i 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.

Printing NCVTS Reports

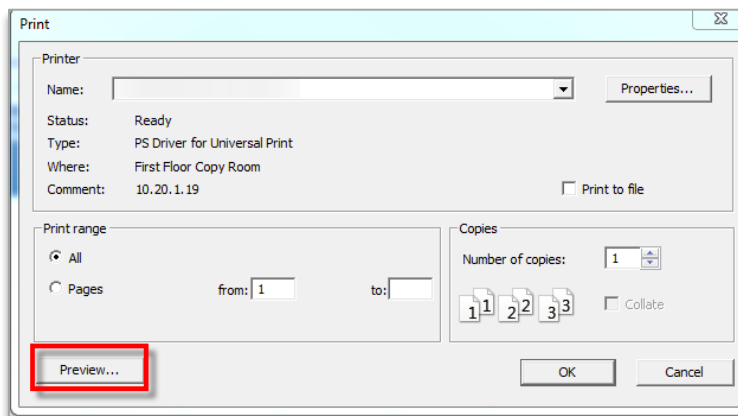
NCVTS users can print report details directly from the NCVTS Reports Viewer window

Exercise Steps

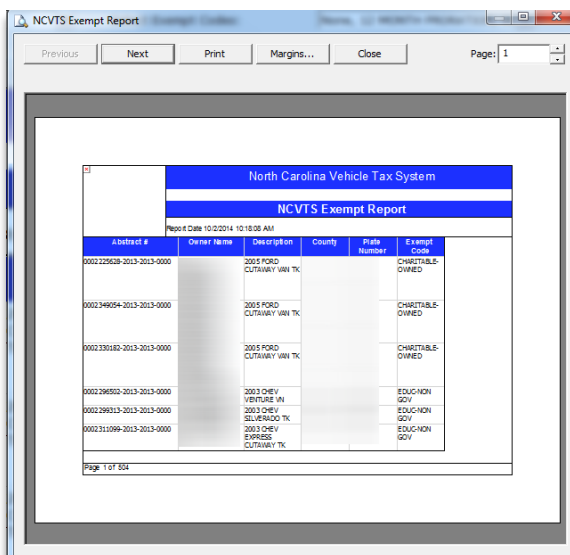
1. Run your report with desired parameters.
2. Click the printer icon.



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



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

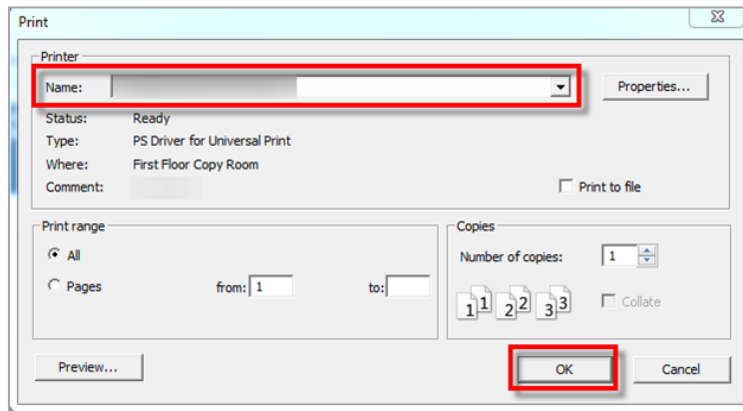


i You can print a range of pages for your report if the entire report does not need to be printed

! 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.

Printing NCVTS Reports (continued)

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

Default Situs Bill Report

Purpose (Renewal Month)

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

Purpose (Transaction Date)

The NCVTS Default Situs Bill 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 <ul style="list-style-type: none"> ▶ New Issuance (*I) ▶ Renewal (*R) ▶ 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 located within

Field	Description
VIN	Vehicle identification number for vehicle with exclusion
Plate Number Category	Plate number and category for vehicle with exclusion
Title Date	Date vehicle titled to owner
Use Code	Code used by DMV to identify vehicle
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

i 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 2018 and when the registration is renewed in October 2018 the expiration has been changed to expire October 2019. 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 "skipped"
Plate Valid Thru	Plate expiration date for vehicle that was "skipped"
Owner Name	Owner name of vehicle that was "skipped"

Field	Description
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

TR1 Vehicle Report

Purpose

The NCVTS TR1 Vehicle Report provides information for the following:

- ▶ Summary of vehicle bills by tax district
- ▶ Amounts paid by tax district
- ▶ Summary of total vehicle fees paid by tax district

Report Fields

Field	Description
Jurisdiction	Applicable tax jurisdiction for bills on report
Total Bill Count	Number of bills by jurisdiction
Total Taxable Value	Summary of total taxable value of all vehicles within a given jurisdiction
Total Taxes Paid	Summary of the total amount of property tax paid within a given jurisdiction
Total Fees Paid	Summary of the total amount of vehicle fees paid within a given jurisdiction

Years Defined

- ▶ Year 1 = Requested year minus three
- ▶ Year 2 = Requested year minus two
- ▶ Year 3 = Requested year minus one
- ▶ Year 4 = Requested year

Vehicle Tax Collection Data Report


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 <ul style="list-style-type: none"> ▶ Tax ▶ Vehicle Fee
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

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


Upload Report

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: <ul style="list-style-type: none"> ▶ Even ▶ Odd ▶ Mixed ▶ Unknown
Situs Street Name	Situs address street name
City	Situs address city

 The Year For parameter will already be populated.

Field	Description
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
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 <ul style="list-style-type: none"> ▶ 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

Field	Description
Plate Code	Plate code for vehicle listed on abstract
Plate Ctgy	Plate category for vehicle listed on abstract

User Activity Report

Purpose

The User Activity Report captures a user's activity within a specified time.

Report Fields

Field	Description
User ID	User
Abstract #	Vehicle abstract number



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

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)
Total Payments	Sum of Taxes and Fees plus interest plus Holds_plus


Field	Description
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

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

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

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 <ul style="list-style-type: none"> ▶ Overpayment ▶ Adjustment >=\$100 ▶ Adjustment <=\$100 ▶ Proration
Refund Status	Status of Refund <ul style="list-style-type: none"> ▶ 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

Field	Description
Address 1	Vehicle owner mailing address
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 <ul style="list-style-type: none"> ▶ Proration ▶ Adjustment
Bill #	Bill base number
Plate Number	License plate number
Status	Refund Status <ul style="list-style-type: none"> ▶ 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 <ul style="list-style-type: none"> ▶ Tax ▶ Vehicle Fee
Change	Net change by tax district and levy type
Interest Change	Net change in interest by tax district and levy type

Field	Description
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

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)
Gross Levy (Tax)	Total of Tax_Renewal_Issue_Levy and Tax_LRP_Levy

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

Field	Description
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	$(\text{Tax_Net_Collections} + \text{Fee_Net_Collections}) / (\text{Tax_Gross_Levy} + \text{Fee_Gross_Levy})$ for month and tax district
Billing Cost %	$(\text{Tax_Net_Collections} + \text{Fee_Net_Collections}) / (\text{sum of all } (\text{Tax_Net_Collections} + \text{Fee_Net_Collections}))$ 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 $\text{Amt_Collected_Credit} / (\text{Tax_Net_Collections} + \text{Fee_Net_Collections})$
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 $\text{Amt_Collected_Debit} / (\text{Tax_Net_Collections} + \text{Fee_Net_Collections})$
Interest Collected	Amount collected attributable to interest
Total Net Collections	$\text{Interest_Collected} + (\text{Tax_Net_Collections} + \text{Fee_Net_Collections})$
LRP Uncollected	LRP that has not been paid
DMV Int Refund	Interest refunded by DMV

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.

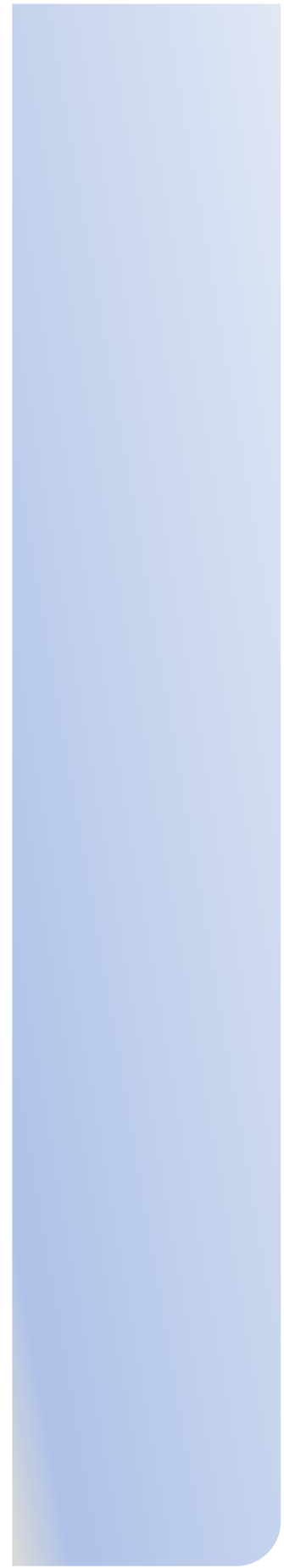
Non- Standard Report Parameters

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 <ul style="list-style-type: none"> ▶ STARS ▶ Non-STARS

Report Fields

Field	Description
Jurisdiction	Tax Jurisdiction
Levy Type	Levy Type for applicable transactions: <ul style="list-style-type: none"> ▶ TAX ▶ VEHICLE FEE

Field	Description
	▶ 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
DMV Interest Refund (\$)	Interest refunded by DMV
Net Levy (\$)	Net Levy = Levy + Interest - Net Adj – Net Adj Interest + Other – DMV Interest Refunds (\$)



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. <i>Alternate terminology: Listing, Record, Vehicle Record</i>
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. <i>Alternate terminology: Renewal tape</i>
LPA (License Plate Agency)	A contracted or county-run office that offers vehicle registration services and title transactions, as well as vehicle license plate renewals, replacement tags and duplicate registrations.
LRP (Limited Registration Plate)	A registration plate that allows property taxes to be deferred for 60 days. A limited registration plate will carry a sticker that expires at the end of the second full month if the vehicle's property taxes are not paid in full. These plates are mainly issued by auto dealerships.
Queue	A set of records that share common information and require work and/o by county personnel. For example, abstracts that include notes for review are accepted from a single "queue" called the NOTES queue.
Renewal Type *I	New Issuance - Plate issued for the first time and the taxes were paid at the time of issuance.

Renewal Type *R	Renewal – Record sent by DMV for vehicles with an upcoming registration renewal.
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.
Situs Address	The physical street address where a vehicle resides. The place where property is more-or-less permanently located. Corresponding STARS field: <i>Vehicle Location</i>
Situs Repository	The list of all physical (situs) addresses in a single county’s NCVTS system.
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.
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: <i>TEC Data Systems, Inc.</i>
VIN (Vehicle Id Number)	A unique code that identifies a specific vehicle.

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, contact the NCID Division Administrator and request an NCID User account.
3. If your county has an NCID County Administrator, but does not have an NCID Tax Administration division, contact the NCID County Administrator to setup a Tax Administration division for your county. The NCID County Administrator will submit a request to ITS to establish the division. Once established, the NCID Division Administrators will be assigned and can issue your NCID User account.
4. If your county is not shown on the link above, proceed with step 5.
5. Go to the NCID site by accessing the following link: <https://ncid.nc.gov/>
6. Click on **Register!** in the bottom right corner of the login box.



NCID
NCID

NCID Login

[Forgot Username](#)
[Forgot Password](#)
[Unlock Account](#)

[Need Help?](#) [Register!](#)

[Privacy and Other Policies](#) [Contact Us](#)

 **WARNING:** This is a government computer system, which may be accessed and used only for authorized business by authorized personnel. Unauthorized access or use of this computer system may subject violators to criminal, civil and/or administrative action. 

Instructions to Setup an NCID Tax Administration Division in Your County (continued)

7. Click the button for **Local Government Employee**.

North Carolina Identity Management

New User Registration

Please indicate your user type from one of the following categories:

Individual	Request access to the State of North Carolina services as an individual or citizen.
Business	Request access to the State of North Carolina services on the behalf of a business.
State Employee	Currently employed or assigned to work for an agency within the State of North Carolina government.
Local Government Employee	Currently employed or assigned to work for a North Carolina county or municipality.

This system is the property of the State of North Carolina and is for authorized use only. Unauthorized access is a violation of federal and state law. All software, data transactions, and electronic communications are subject to monitoring.

[North Carolina www.nc.gov](#) [Privacy and Other Policies](#) [Contact Us](#)

8. Click on **Send Email to NCID**.

North Carolina Identity Management

Local Government Employee Registration

Local agencies do not allow for self-service registration. Please click the following link and contact a delegated administrator (DA) to request an account.

Find your LEA NCID DA by clicking the link [Local Education Agency DA list](#)

Find your county, municipality or community college NCID DA by clicking the link [North Carolina County DA list](#)

If you could not find the desired agency, please click the following button to send email to NCID



Send Email To NCID

This system is the property of the State of North Carolina and is for authorized use only. Unauthorized access is a violation of federal and state law. All software, data transactions, and electronic communications are subject to monitoring.

[North Carolina www.nc.gov](#) [Privacy and Other Policies](#) [Contact Us](#)

**Instructions to Setup an NCID Tax Administration Division in Your County
(continued)**

9. Complete the information on the request form as shown below and click **Submit**.

 **North Carolina Identity Management** 

Request new local government agency

NOTE: THIS FORM WILL NOT ALLOW YOU TO RESET/UNLOCK YOUR NCID ACCOUNT. PLEASE CONTACT THE DELEGATED ADMINISTRATOR OF YOUR AGENCY FOR ASSISTANCE. THANK YOU

Please fill your agency, division and/or section name and click submit button

Agency Name (* Required)

Division Name (* Required)

Section Name

Primary Contact's Name (* Required)

Primary Contact's Email (* Required)

Primary Contact's Telephone Number (* Required)

←

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 the 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

Field Description	Data Type	Field Length	Required Conditional Optional	Notes	Examples
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	A

Field Description	Data Type	Field Length	Required Conditional Optional	Notes	Examples
				O: Other Name P: Preferred Name F: Former Name	
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~~
01011853~12312011~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~~0101
1853~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~CITY~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
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

Error Code	Description
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
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

Appendix E: Printing a Tax Receipt

NCVTS includes functionality on the Bill Detail page that allows users to print a receipt for property taxes only. If the citizen would like an official receipt, they must contact DMV.


The screenshot displays the NCVTS Bill Detail page for a property tax bill. At the top, the Bill # is 0030342077-2016-2016-0000-00 and the Bill Status is PAID. A red box highlights the 'Print' button in the upper right corner. The page is divided into several sections:

- Taxpayer Info:** Shows Owner Id (20635906), ID Number (DRIVER LICENSE-*****64003), Name, Mailing Address, and Owner Order (PRIMARY).
- Property Info:** Shows Personal Value (\$32,560), Exempt Value (\$0), and Total Value (\$32,560). It also includes VIN, Lender, and Description (2015 BUIC ENCLAVE MP).
- Bill Info:** Shows Source Type/System (RMV PROPERTY TAX), Abstract # (0030342077-2016-2016-0000), Bill Date (03/26/2017), Interest Begin Date (07/16/2017), Bill Due Date (07/15/2017), and Final Payment Date (07/01/2017).
- Tax Amount:** A table showing the breakdown of taxes and fees.

# Months	Description	Original Billed(\$)	Current Due (\$)
	Tax & Fees	293.85	0.00
	Interest		0.00
	Total	293.85	0.00
- Payment History, Transaction Summary, Transaction Detail History, Notes, and Change History:** These sections are currently empty or collapsed.

Exercise Steps

1. Click the **Search** link in the upper right of the page.
2. Click the **Bill** tab, enter search criteria, and click the **Search** button.
3. Click the desired Bill #.
4. Click the **Print** button in the upper right corner.
5. Select **Open** in the popup box to display the receipt in Word.
6. In the toolbar, click on **File**, then **Print**.
7. Update your print settings as desired and select **Print**.

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

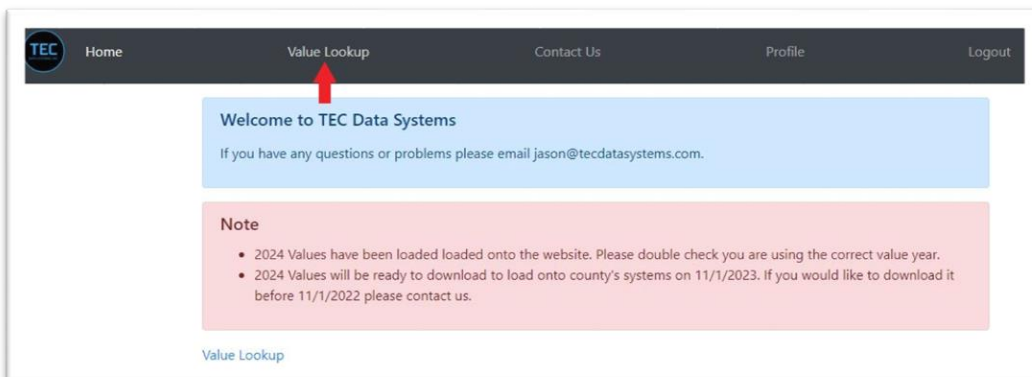
Appendix F: Researching Sales Data

The Local Government Division of the NC Department of Revenue must annually adopt a schedule of values, standards, and rules to be used in the valuation of classified motor vehicles. NCDOR has contracted with TEC Data Systems to provide the values for the NCVTS. TEC Data Systems has created a website for state and local government personnel to review sales information used in determining these values.

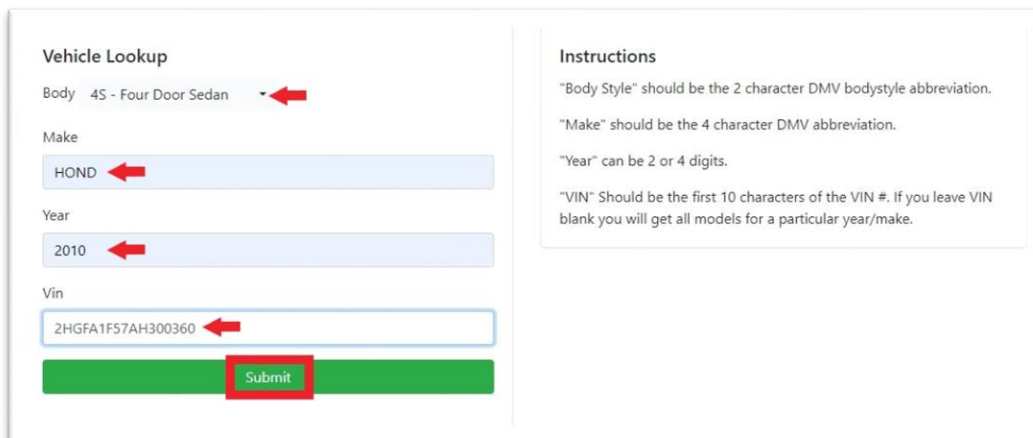
You may access this resource by creating a login using your government issued email address at <https://tecdatasystems.com/>.

Instructions for researching sales data:

1. After logging into the website, select *Value Lookup* in the toolbar.



2. In the *Vehicle Lookup* box, select the vehicle body, then enter the vehicle make, year, and VIN (optional). Click *Submit*.



- The specific valuation results will be displayed when a VIN is entered. Next, you may select to view sales history by make and model or VIN.

Lookup

Body: **4S**
 Year: **2010**
 Make: **HOND**
 VIN: **2HGFA1F57AH300360**

Result

Model Year: **2010**
 Make: **HOND**
 Model: **CIVIC LX AUTO**

2024 value: **5640** sales history by [make & model](#) or [by vin](#)
 2023 value: **4270** sales history by [make & model](#) or [by vin](#)
 2022 value: **4730** sales history by [make & model](#) or [by vin](#)

Note: Sales history by vin shows the sales history for all vehicles with the same first 8 vin digits.

Sales history by make and model shows all vehicles identified with that make and model regardless of vin.

- After making a selection to view the sales history, the sales data and median adjusted sales price are displayed. The adjusted sales price should be used, as it adjusts the actual sales price to the assessment date.

2023 Sales Data
 Vin: 2HGFA1F5_A

235 sales

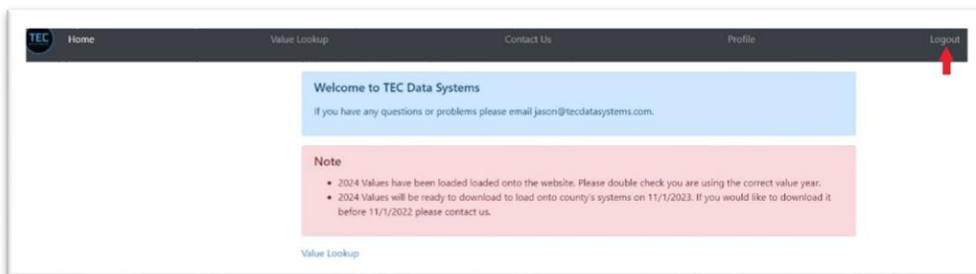
Median Adjusted Price \$5,950

Year	Make	Model	Sales Date	Sales Price	Adj Sales Price	VIN
2010	HOND	CIVIC LX AUTO	12/18/2022	✖ \$1,000	✔ \$956	2HGFA1F54AH322302
2010	HOND	CIVIC LX AUTO	6/29/2022	\$1,500	\$1,400	2HGFA1F55AH548381

5. You will also find the option to calculate a high mileage discount below the value lookup results box. Select the valuation year, and then enter the vehicle mileage. The discount percentage and discounted value will be displayed. For additional information on high mileage, click *High Mileage Info*.

The screenshot shows a 'High Mileage' calculator interface. At the top, it says 'High Mileage' and 'To calculate a mileage discount enter in the mileage as of January 1st of:'. Below this are three radio button options for the valuation year: 2024 (selected), 2023, and 2022. A red box highlights these options. Below the radio buttons is a text input field for 'Mileage' containing '220000', with a red arrow pointing to it. Below that is a text input field for 'Value before discount' containing '5640'. Below that is a text input field for 'Discount' containing '10%', with a green arrow pointing to it. Below that is a text input field for 'Discounted Value' containing '5076', with a green arrow pointing to it. At the bottom is a blue button labeled 'High Mileage Info' with an information icon.

6. When you have finished your research, click *Logout* on the toolbar.



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