Boundary Line Adjustments

Thursday, March 24, 2016

11:47 AM

<<SPLIT MERGE CHECK LIST 5.10.2018.xlsx>>

Start all splits/merges with the Split/Merge Check List located at C:Clerical/SegDept/Forms and Letters/SPLIT MERGE CHECK LIST

For splits print the check list on green paper and for merges print the check list on pink paper (really just make sure they are different colors and be consistent with the colors)

Pull up the parcel(s) to be split/merged in PACS

Start with the top of the form:

**Date:**

**From:**

**To:** Look at the neighborhood code. If it starts with a 1=Chris, 5=Rikki, 6&7=Mark

**Reval:** Cycle number

**Survey:** If you know there is a recorded survey put RS#\_ \_ \_ \_. If it is a Short Plat or Binding Site Plan put that number here.

**Parent:** List all parent Geos and PIDs

**Children:** Skip for now, we will come back.

**AF# & Owner:** List all recorded documents AF#s and all owners. This is also where you can list any sales happening with this split/merge.

**Approval by either City or County?:** You will need to look at the excise for this. There should either be a letter of approval for the City or there will be a stamp at the bottom of the excise for the County.

<<Letter of Approval.pdf>>

**Split/Merge for taxes?:**  Is this a tax consolidation or segregation from a tax consolidation?

**Are taxes current?:**  Are the taxes paid in full on ALL parcels involved in this split/merge? If not, there is a letter in the Seg Dept folder for taxes owing that needs sent to the taxpayer.

**Paid through? (Year):** What year are the taxes paid through? Ex. 2018

Skip the next section on the check list (legal description and maps) and we will come back.

**Special Assessments match?:** Check Tax Area & Exemptions panel on all parcels and make sure they all have the same special assessments.

**TCA's match?:** Check the TCA on each parcel to see if they match. If they don't match, we will need to see what the different tax areas are and how they will be affected by this. This could result in having to create additional parcels to account for the different TCAs.

**Related properties?:** Are there linked, real properties?

**CRID Assessment?:** In the property group code ribbon (yellow) at the top of each parcel it will have a group code that says CRID #\_ \_ if it is in a CRID district. If you have a parcel with this it will require additional contact after the split/merge is complete. See “Plats in PACS” procedures.

**TCA has possible annexations?:** On the Tax Area & Exemptions panel there is a black button that says "Annexation". Click that. If there is anything in the box, this means there is a pending annexation. Talk to Mary before proceeding.

**Personal Property:** Check the Splits, Merges & Property Links panel to see if there is any personal property.

**Senior Exemption:** Check the Tax Area & Exemptions panel to see if there is a senior/disabled exemption. If so, you will need to let Marlena know when the split/merge is complete.

**Exempt Property?:** Check the Tax Area & Exemptions panel to see if there is an exemption other than a senior/disabled exemption. If so, you will need to let Heather know when the split/merge is complete.

**Mobile Home?:** Check the Split, Merges & Property Links panel and the beginning of the legal description to see if there is a linked more fixed mobile home. If so, you will need to let \_\_\_\_\_\_ know when the split/merge is complete.

**Open Space?:** Look at the Summary panel. If the property use code is an 83 or 94, you will need to talk to Rikki BEFORE you complete this split/merge in PACs. If any of the land is being removed from Open Space, Rikki has to remove it first before you do the split/merge in PACS.

**Supplement years?:** If any of the parcels in the split/merge are in open space or exempt, back year are required to be completed so that the taxes are taken care of correctly. In addition, if we are working in a certified year, the split/merge will have to be supplemented to be created in the correct years.

Back to the legal description section:

Now you will want to open auto cad → type "find" and enter → enter one of the parcel numbers → you may want to now mark the parcels that are part of this split/merge in a way to help you identity them (ex. adding a circle to each parcel). Highlight the section(s) that include the parcels you are working on → type "w" and select WBLOCK from the drop down → click the … and save this WBLOCK to the folder you want, naming it after the split/merge and then click okay → click okay and the popup should close. You will want to close the main parcel base now and open up just the WBLOCK of the parcels you are working on.

In the WBLOCK for you split/merge, draw out all of the legal descriptions provided to you. If there are any errors you will need to contact the taxpayers/surveyor/title company involved. Do not proceed any further until a correction has been recorded.

BLA IN PACs

Thursday, February 16, 2017

8:39 AM

When segregating multiple properties, you must merge them first. Choose one parent to merge all parents to.

At the property level, go to Commands → Merge Property (begin wizard)

1. Add all properties associated with the seg and check the box next to the parent you have chosen to merge to.
2. Select all assessment years appropriate for the seg. (ex. 2016 & 2017)
3. Add comments (ex. MERGED FOR SP#3515 PER AF#2016-035092, 11/17/2016.)
4. At this point you should see the assessment years you selected showing in the Years Processed section.
5. Once you have this screen the way you want it to look you can do one of two things.
   1. OK - save the data entered so far for the merge, which can be continued later by opening it up through Pending Split/Merge in Activities. (You will want to have at least one PID for easy lookup)
   2. Process - Begins the merge.

Once you begin the merge several boxes will show up:

Property Listing: This box shows all parcels involved in the merge and taxes that are due.

Review parcels, if everything is good click Next.

Merge Summary: This box shows what is happening to each parcel in the merge. You will see the parent that you chose to merge and then the other parcels that will be deleted.

Review parcels, if everything is good click Next.

Update Legal Description: This is where you can update the legal of the new parent as well as the land size. Be sure everything adds up correctly. (Hopefully we can copy and paste legals in from Word)

You can choose to have all building permits travel with the parent if you would like.

Once everything looks good, push Finish.

If you have multiple years, this will put you back to the initial merge screen and you will need to click Process again to do the next year(s).

Once all the assessment years are processed, click Finish.

If there were supplements made, be sure to move the seg to the supplement group when you are ready to do so.

Now you are ready to complete the seg.

Go to the property that you merged all parents to. Go to commands → Split property (begin wizard)

1. Select all assessment years appropriate for the seg.
2. Fill in the number of properties to be created by the seg.
3. Selected supplement code if necessary and fill in notes.
4. Check the box next to Delete Original Property.
5. Check the box to Create Event on Split.
   1. Fill in the details of the BLA. Example: SHORT PLAT #3515 LOTS 1-3 PER AF#2016-035092, 11/17/2016 FOR THE 2016/2017 TAX YEAR.
6. If all looks good, push Process to continue or OK to save for later.

<<PACs Warning when doing a seg from a merge.jpg>>

Once you begin the split several boxes will show up:

Tax & Assessments Due: This box shows the parent parcel and any taxes owed on it.

Review → Next

Property Detail: This screen shows the parent parcel at the top and all children to be created at the bottom with their new PIDs.

Click on the + by Land and move it to the respective children, and then do the same with Improvements.

Balance Verification: This box shows all of the new info for the children that was entered in on the previous screen and the info of the parent that will be deleted.

Review → Next

Update Legal Description: This box is where you will enter the new legals for the children parcels and assign new parcel numbers (Geo ID).

Click on the drop down box by each legal and copy and paste the new one in from Word. Click on the Geo ID for each and change it to the new number.

Review → Next

Split Summary: This box shows the summary of the split.

Review → Finish