Consolidations

Friday, March 11, 2016

4:21 PM

Start with a Merge Check-Off List

<<CheckList\_Merge.doc>>

* 1. Fill in the top portion of the form with the parent parcels, owner and AF# & Date.
  2. Be sure there is a letter from planning. If there was not one recorded with the deed go to G:\SEG\_DEPT\SCANNED LETTERS OF APPROVAL and then to the respective city and year. If you don't find one, contact the respective city to see if one has been requested.
  3. Check all parcels to be sure taxes have been paid. If taxes have not been paid, you cannot process the consolidation. Contact the taxpayer by phone/email/mail to notify them. Keep checking back until they are up to date.
  4. Make sure that all parcels have the same TCA & Special Assessments. Check as see if any of the parcels have annexations pending, related properties of any kind (linked), and exemptions of any kind. (make note if they have any of these)
  5. Check the legal descriptions on each deed. The best way to do this is to draw them out in Auto CAD. If there are any errors, contact the taxpayer or surveyor to have them corrected and rerecorded.
  6. Go to PACs:
     1. Go to the Property Search screen to find the next Geo ID in the sequence which will be your new parcel number.
     2. Type in the parcel number of a parent leaving off the last 3 digits. Check the box to include deleted and reference properties so it shows all active and inactive parcels. Change the Max Rows to the highest number. Click search.
     3. Sort by parcel number and see what the last number series is (you may need to export this data into excel to make sorting easier). Type this into the GEO ID search to be sure there is a record for that number. Then change the last number to the next in the series and search again. You should see a blank screen with 0 search results.
     4. This is your new parcel number. Write that at the top of the Merge Check-off List.
  7. Go to QGIS and create your before and after maps.
     1. Double click on Parcel Query → Click on General → Click on Query Builder in the bottom right corner → enter in all of the parcel numbers (the format for each parcel number is "Parcel\_ID"='123456789012345' or "Parcel\_ID"='123456789012346' or etc. )→ Click OK → Click OK
     2. In the layers panel on the left side, you will see your parcel numbers and the number of parent parcels in () next to Parcel Query. Right click on Parcel Query and select Zoom to Layer.
     3. You should now see all of the parent parcels. You can change the color and style of the parcels by double clicking on Parcel Query and going into the style tab. Make sure the top drop down in the style tab is set to Categorized and click the Classify button mid-way down the screen.
     4. Once the map looks how you want it, go to Project (at the top) and select Composer Manager or click the Composer Manager icon, select Alandscape and the Show.
        1. This will bring up the map in a new window. Adjust the information and the top of the document to match your merge. Then click on the map to bring up the Items Properties tab, and, midway down, click Set to map canvas extent. This will bring whatever you have pulled up on your main QGIS map into this document. You can zoom in or out on the main map and continue clicking Set to map canvas extent until you have it looking the way you want it.
     5. Once the map looks how you want it, go to Composer (at the top) and select print.
     6. Once you have the before map printed, you will want to go back to your main map and change it to look how it will after the merge. You can do this by drawing in the new lines in QGIS (using the TempArea Shapefile) or by bringing in your ACAD drawing (see ACAD notes). Add the new parcel number by adding a text box and entering it in there. You will want to hide the parent parcel number(s) and boundary lines but unchecking the Parcel Query box in the Layers Panel.
     7. Once you have the map looking the way you want, go back to your Composer window and update the information and the map to show the after map and then print at least 2 copies (if there are multiple owner entities print one for each and one to keep).
  8. At this point I like to type up the new legal description in a word document so that you can copy and paste it into PACs when you are ready. This way Word spell checks for you and you don't have to worry about typing the legal into the tiny box on PACs. Be sure to reference the recorded document at the end of the legal description and specify whether it is a tax consolidation or a legal consolidation.
  9. Go back to PACs
     1. Go to one of the parent parcels → Commands → Merge property
        1. The wizzard will pop-up and take you through the steps of merging.
        2. In the Merger Property panel:
           1. Add all properties involved by clicking the + and then typing in the PID or GEO ID.
           2. Select all Assessment years that apply for this merge.

If there is a supplement year, be sure to select the correct supplement code and put in notes.

* + - * 1. Check the box to Create a New Property unless you are merging them to a current parent. If merging them to one current parent, be sure to check the Merge to box next to the correct parent.
        2. Create an event:

For the Description fill in the information for the merge. Ex.: LEGAL CONSOLIDATION PER AF#2016-019695, 07/07/2016 FOR THE 2017/2018 TAX YEAR. Be sure to add any additional information about the merge you see necessary. (Ex. Open Space, Exemptions, etc.)

* + - * 1. Make sure all of the assessment years selected are showing up in the Years Processed box.
        2. If everything looks good, click OK to save and close (finish later) or click Process to continue.
      1. Once you click process:
         1. Property Listing Panel:

This panel lists all of the properties included in the merge.

Review and click Next.

* + - * 1. Merge Summary Panel

This panel shows what is happening to each of the properties. It should show all of the parcels being deleted and the new parcel being created.

Review and click Next.

* + - * 1. Update Legal Panel:

This panel is where you will update size, legal description & Geo ID.

Click in the box of any value/text you would like to change and then type in the new information.

This is when you can copy and paste the legal description and new Geo ID into the respective boxes.

If it is platted, you only need a description under Legal Description. If it is not platted, you need a description under both Legal Description and Meets & Bounds.

Check the box next to Copy all building permits.

If everything looks good, click Finish.

* + - 1. If doing multiple years, you will have to process through each additional (supplement) year following the steps above.
  1. Mail Letter:
     1. Send a merge completion letter to all taxpayer entities that are a part of the merge.
     2. Attach a copy of the letter to the event note in PACs.
  2. Post to SMOO Tracking sheet & Audit List.
  3. Notify appraiser when child parcels are ready to be valued. Send them any information necessary.
  4. When appraiser is finished with their work on the child parcels, send the SM00 packet to be Audited.