

# ACCESSDANE

## *Managing Municipal Special Assessments and Charges*

Beginning in 2017, the process used to manage special assessments and charges migrated to an efficient data model leveraging custom tools built in AccessDane. The overwhelming positive response to the pilot project in 2017 has encouraged Dane County to formalize the process for all municipalities in 2018.



# ACCESSDANE

## *Managing Municipal Special Assessments and Charges*

Managing special assessments and charges is the first venture into sharing sensitive tax related information via AccessDane. Accordingly, additional security steps have been put into place, the largest of which is the use of two-factor authentication. The screen shots below demonstrate what a user can expect when it comes to verifying identity:

### **TWO-FACTOR AUTHENTICATION**

- When attempting to log-in, for security purposes, a users identity must be verified. The initial message will request a delivery method for receipt of a verification code:

**AccessDane**  
Geographic & Land Information

## Choose your verification delivery method

We need to verify your identity. You can change/add a number where we can text you at after your identity has been verified.

Email

Don't ask me for a verification code again using this browser on this computer.

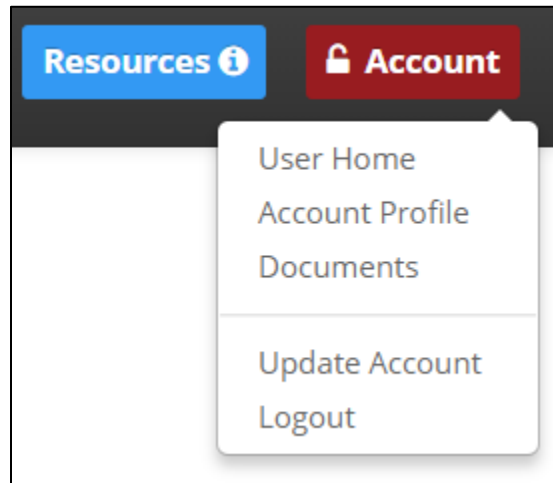
*Note* - By selecting the check-box circled above, a user can have their identity remember for that browser on that computer for 90 days.

- When the e-mail method is selected, a user will find a message in their inbox that will look like this:

From:	donotreply@countyofdane.com
To:	Everson, Troy
Cc:	
Subject:	Dane County Verification Code

**Your Dane County Verification Code is 102154.**

- Users may also wish to change the method to receive a verification code. If a phone number is entered, a text message can also be used. Here is how that option is possible:



**SELECT Update Account** from the **Account** button when logged in.

An area for Two Factor Authentication cell number is located at the bottom:

Two Factor Authentication

Cell Number

The next time, there will be two options to choose from:

## Choose your verification delivery method

We need to verify your identity. You can change/add a number where we can text you at after your identity has been verified.

Email

Text

Don't ask me for a verification code again using this browser on this computer.

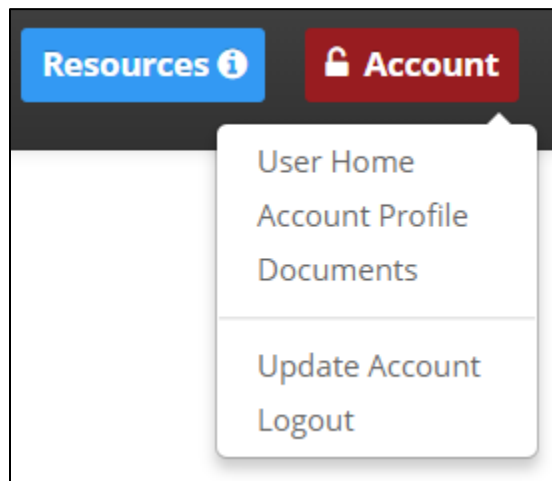
## SPECIALS ADMINISTRATORS AND EDITORS

Another enhancement related to security and the theme of AccessDane is that there is role-based functionality that can be designated. When it comes to managing specials, there are two roles that can be assigned to any staff within your municipality. The two roles are SPECIALS ADMINISTRATOR and SPECIALS EDITOR. The specials *administrator* is essentially the gatekeeper prior to submitting special assessments and charges back to the county. The administrator can designate anyone in the organization as an *editor*. There can be only one administrator, but multiple different editors (only one per code, however). Editors work on individual codes, save them and submit.

The AccessDane account **administrator** must assign a SPECIALS ADMINISTRATOR to begin. Here is more on how to assign these important roles for managing specials:

### ASSIGNING ROLES

- *SELECT Account Profile* from the **Account** button:



- A grid of authorized users will appear. From this page, the ADMINISTOR can GRANT or REVOKE different roles.

Troy M Everson ( <b>Administrator</b> )	<ul style="list-style-type: none"> <li>• Surveyor</li> <li>• AccessDane_Specials_Admin</li> <li>• AccessDane_Specials_Editor</li> </ul>	<ul style="list-style-type: none"> <li>Grant Address Update</li> <li>Grant Notifications</li> <li>Revoke Specials Admin</li> <li>Revoke Specials Editor</li> </ul>
Erica Schmitz	<ul style="list-style-type: none"> <li>• Public Agency View</li> <li>• Public Agency Addr</li> </ul>	<ul style="list-style-type: none"> <li>Remove User</li> <li>Revoke Address Update</li> <li>Grant Notifications</li> <li>Grant Specials Admin</li> <li>Grant Specials Editor</li> </ul>

- When the roles have been assigned, the AccessDane user homepage will have an area for Special Assessment management:

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## Specials

**Edit Specials**  
Edit Specials for your organization.

**Admin Specials**  
Manage Specials for your organization.

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- When the Admin Specials link is selected, the following page is accessed:

Administer Specials Codes for 2018 tax year

Go To Edit Specials

Administer codes assigned to TOWN OF DUNN ▼

- The heading for Administer codes assigned will accordion down to display all the special codes that were active from the previous year:

Administer Specials Codes for 2018 tax year

Go To Edit Specials

Administer codes assigned to TOWN OF DUNN ^

C02 - SD #1  
TOWN OF DUNN

**Assigned User:** DaneCountySurveyor  
**Save Date:** 3/6/2018 9:46 AM  
**Saved By:** DaneCountySurveyor

Remove User

Inactivate Code

Unlock View

CSV Report

C05 - SD #3  
TOWN OF DUNN

**Assigned User:** DaneCountySurveyor  
**Save Date:** 3/8/2018 2:12 PM  
**Saved By:** DaneCountySurveyor

Remove User

Inactivate Code

Unlock View

CSV Report

C07 - SD #4  
TOWN OF DUNN

**Assigned User:** DaneCountySurveyor  
**Save Date:** Not saved yet.  
**Saved By:**

Remove User

Inactivate Code

Unlock View

CSV Report

*Note* – Codes that are no longer needed can be **inactivated**; if new codes are needed, there will be a **request new code** button near the bottom of the page.

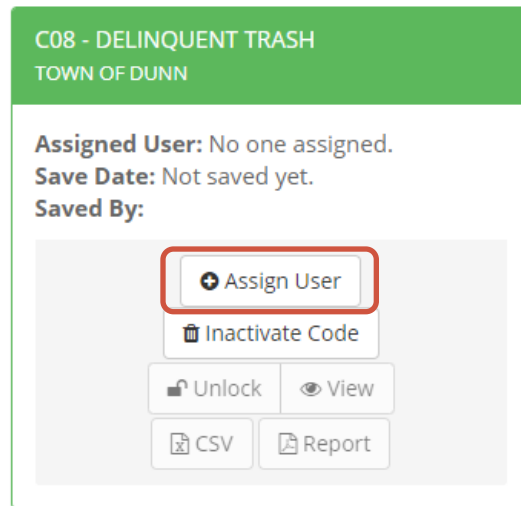
Request New TOWN OF DUNN Code

Ask for a new code to be added to TOWN OF DUNN.

+ Add Code

4 ©

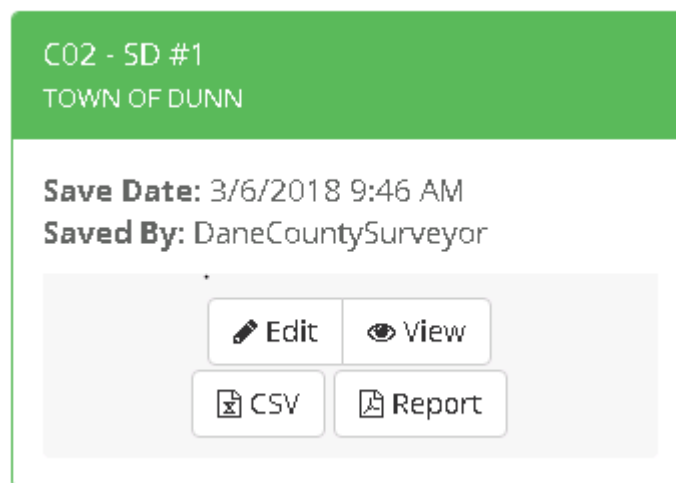
- To assign an **EDITOR** for a special code, select **Assign User**:



- Any user that has been granted the **EDITOR** will be available in the following dropdown:



- Once an **EDITOR** has been assigned to a code, that code becomes available when the **EDITOR** navigates to the **EDIT SPECIALS** link. Only one editor can be assigned per code. It will look like this:



- As an EDITOR, to begin editing a code, *select Edit* from the window above. The following specials editing screen will appear:

Note – From this screen, you can add parcels, edit values, and remove parcels. You are also able to save your work and finish which will then tell the SPECIALS ADMINISTRATOR that the code has been completed for the year.

- From this screen, the headings on the left can expand to reveal the editing tools. When fully expanded, here are the options:

ADD PARCELS

There are three different methods to add parcels. There is a Batch Upload, Add Parcel to bring in individual parcels, or you can bring values forward from the previous year (as seen above).

EDIT PARCELS/VALUES

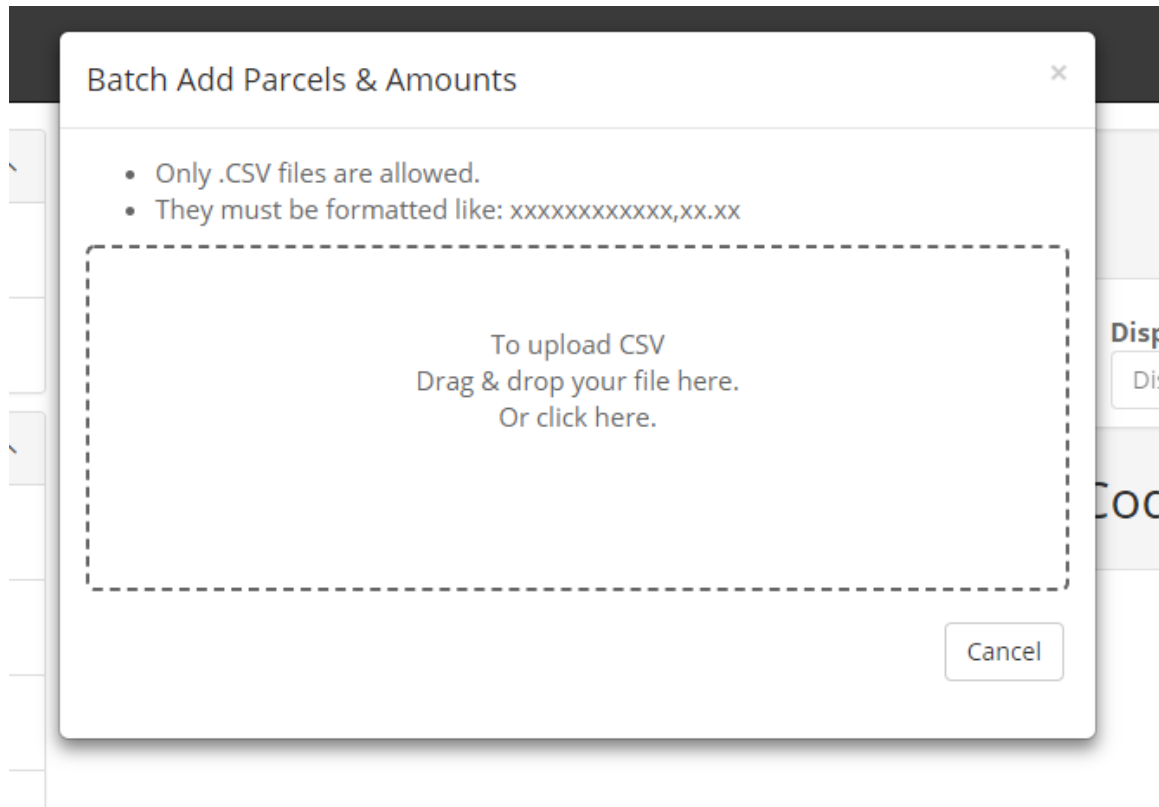
This section of tools will work off of the parcels listed that have been added to the code. They work based on whether the records are selected or not.

SAVE/FINISH

Saving your work allows progress to be saved in session. You can exit AccessDane and the work will be saved. Finish Code will lock the code and alert the administrator that the code has been completed for the year. The code, however, has still not been submitted to the county yet, only giving notice to the Specials Admin, who can submit when all codes have been finished.

## BATCH UPLOAD

- Selecting the **Batch Upload** will result in a screen that appears like this:



*Note* – the file to be uploaded needs to be a CSV or comma separated text file. The format needs to be the 12 digit parcel number-comma-value *EX:* 051201999999,100.00

- If there is an error with either the Batch Load or the bringing parcels forward from a previous year, it will look like this:

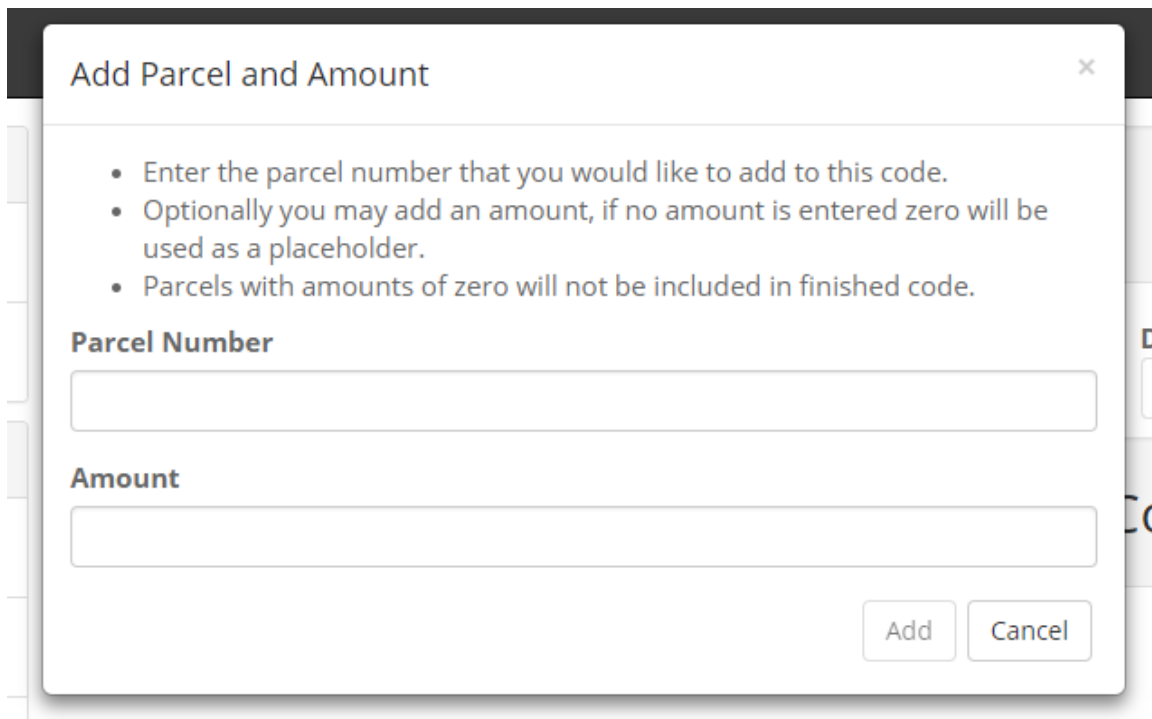


*Note* – Typically, this error will result when parcels have been retired for given year and aren't assessable for the current tax year. Please use AccessDane to track the history to identify the appropriate tax parcel for your special code or use your split roll in the documents section of AccessDane.



**ADD PARCEL**

- To add a single parcel to the code, *SELECT Add Parcel*



**Add Parcel and Amount** ×

- Enter the parcel number that you would like to add to this code.
- Optionally you may add an amount, if no amount is entered zero will be used as a placeholder.
- Parcels with amounts of zero will not be included in finished code.

**Parcel Number**

**Amount**

**Add** **Cancel**

*Note* – Add your parcel number and the amount, *select Add*

## EDIT PARCELS/VALUES

**Specials Editing**  
**Selected Code:** D03 - SD #2  
**Municipality:** TOWN OF DUNN

**Select Rows**      **Sort By**      **Display Additional Info**

Number Of Parcels: 38 Total Amount: \$11,989.01	Number Of Selected Parcels: 0 Total Of Selected Parcels: \$0.00
+ Parcel: 028/0610-133-8690-7 <a href="#">Map</a> <b>Amount: \$505.39</b>	
+ Parcel: 028/0610-143-6519-7 <a href="#">Map</a> <b>Amount: \$122.40</b>	
+ Parcel: 028/0610-144-5278-0 <a href="#">Map</a> <b>Amount: \$122.40</b>	
+ Parcel: 028/0610-144-7535-0 <a href="#">Map</a> <b>Amount: \$122.40</b>	
+ Parcel: 028/0610-144-7568-0 <a href="#">Map</a> <b>Amount: \$505.39</b>	
+ Parcel: 028/0610-144-7823-5 <a href="#">Map</a> <b>Amount: \$122.40</b>	
+ Parcel: 028/0610-144-7834-2 <a href="#">Map</a> <b>Amount: \$122.40</b>	
+ Parcel: 028/0610-144-7889-7 <a href="#">Map</a> <b>Amount: \$505.39</b>	
+ Parcel: 028/0610-144-7922-5 <a href="#">Map</a> <b>Amount: \$505.39</b>	
+ Parcel: 028/0610-144-9045-3 <a href="#">Map</a> <b>Amount: \$505.39</b>	
+ Parcel: 028/0610-144-9600-0 <a href="#">Map</a> <b>Amount: \$97.39</b>	
+ Parcel: 028/0610-232-1401-0 <a href="#">Map</a> <b>Amount: \$122.40</b>	
+ Parcel: 028/0610-232-8350-8 <a href="#">Map</a> <b>Amount: \$505.39</b>	

Caution: Manually import or open CSVs into Excel, do not double click to open. Excel will strip leading and trailing zeros, if columns are not set properly.

[Download list as CSV](#)

When valid parcels have it will look like the above. A couple of notes:

- All editing, find and replace etc... work based on the **SELECTED** records in the table above. To perform updates, first make sure the records are selected (to do so, select **ALL** by the Select Rows near the top or select manually for a partial selection)
- Individual parcels can also be selected/unselected
- Information about the parcel can be viewed by selecting the **GREEN +** button
- The DCiMap version of the record can be viewed by selecting **MAP**
- Sorting can be done
- The entire list can be downloaded as CSV
- When records are selected, they will appear orange:

**Select Rows**      **Sort By**      **Display Additional Info**

Number Of Parcels: 38 Total Amount: \$11,989.01	Number Of Selected Parcels: 38 Total Of Selected Parcels: \$11,989.01
+ Parcel: 028/0610-133-8690-7 <a href="#">Map</a> <b>Amount: \$505.39</b>	
+ Parcel: 028/0610-143-6519-7 <a href="#">Map</a> <b>Amount: \$122.40</b>	

## SAVING/FINISHING CODE

- Saving Work will save any progress made on a code. You will be able to exit AccessDane and return later with the update available.
- Finish Code will lock the code and notify the specials administrator that the code has been completed. At this point, nothing has been submitted to Dane County. The Specials Admin will still be able to unlock and make edits to the code.

Finish Code
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Clicking finish will signal to your organization's Specials administrator that you are done with adding parcels and values to this Specials Code for this year.

Once finished has been clicked this code will be locked from further editing, you will need to talk to your organization's Specials administrator if you need to unlock this code.

**Any parcel with a code amount of zero will be removed at this point.**

**Are you finished editing for this year?**

- To the Specials Admin, the code will now appear grayed out. When all special codes have been finished, the Specials Admin will have an option available to Submit Codes to the County:

Submit TOWN OF DUNN Codes

Button is enabled once all available codes assigned to TOWN OF DUNN have been marked as finished.

- The specials have now been submitted to the County and an email notification will be sent to the Specials Admin:

From: property.listing@countyofdane.com

To: Everson, Troy

Cc:

Subject: D03 SD #2 has been marked as finished

**Troy M Everson has marked D03 SD #2 as finished for TOWN OF DUNN.**