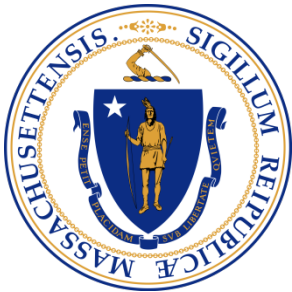


Commonwealth of Massachusetts



Supporting a Commonwealth of Communities

LA3 Tips for WCAA

03/22/2023

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Field Advisor, Bureau of Local Assessment



The LA3 - Sales Analysis Period

- Assessment Date is always the January 1, preceding the Fiscal Year. The Base Year of sales that must always be used are from the prior calendar year.

Example: LA3 for FY2024

Assessment date 01/01/2023

The calendar year preceding the assessment date – (2022 sales) are used as the “Base Year”

To determine if 24 months of sales are needed; review total property class counts and sale counts by class.

- 2% of the class **OR** minimum of 10 sales, whichever is greater

Example: Class 104 has 330 parcels and 8 valid sales occurring in calendar year 2022.

2% of the parcel count is 7 sales, however $7 < 10$, so 24 months of sales are needed



The LA3 - Sales Time Periods

When 24 months of sales are required there are 2 options:

A. Use sales from the Base Year and 12 months **before** the Base Year;

In our example for FY2024

*The calendar year **before** the Base Year of 2022 is 2021*

Sales analysis period 01/01/2021 to 12/31/2022

or B. use Base Year and the 6 months of sales immediately **before** the base year and 6 months immediately **after** the base year;

In our example for FY2024 this would be

July 2021 to December 2021 and January 2023 to June 2023

Sales analysis period 07/01/2021 to 06/30/2023

There can be several factors to consider when selecting which time period to add the additional 12 months of sales from (when required). In rapidly changing markets, the oldest sales may contain the most dramatic differences from the assessment date and the current market. Also, using the most recent sales data may show that market increases or decreases are continuing.

Must use the same sales analysis period for all classes requiring 24 months of sales.



Sales Verification Resources

Sale Inspections- BLA still recommends to go physically measure and inspect all sale properties in all property classes as close to the sale date as possible- Get Outside!!!

Deeds, Certificates of Title

Supplement sales inspections and legal instruments with:

Interviews with buyers, realtors, sellers, builders, appraisers

Online sale listing, Google, "Search it Up", News articles

Sale Questionnaires- make them easy to return, tailor to property use

Multiple Listing Service, Cape Cod and Islands MLS, Berkshire County MLS

Realtor.com, Loopnet, CoStar, Zillow, etc.

Secretary of State Corporate Database

<https://corp.sec.state.ma.us/corpweb/corpsearch/CorpSearch.aspx>

Things you hear from neighbors or in town hall (try to verify)

Income and Expense Returns, Building Permits, Business Certificates/Use Permits





LA3 Common NAL Sale Coding Helpful Hints- NAL R Code Resales

Used when there are multiple *VALID* sales of the same parcel in the sales analysis period. Code out all the valid sales in the sales analysis period *except* the sales closest to the assessment date. Do not use in cases with NAL sales.

3 Ways to Review: LA3 Macros- Green Check

In Gateway, use Search/Update/Delete screen and check Repeat Sales Only

Manually sort sales in Excel file by Parcel ID and then by date

jur_code	sale_date	parcel_id	seller	buyer	st_num	st_alpha	st_name	prop_type_id	nal_code	sale_price	assessment_value	proposed_value	as_ratio	outlier	time_trend	Comment	Location ID
353	01/02/2022	96_1	LOU WHO, CINDY	GEORGE, CURIOUS	32		FROST AVE	101	R	485,000	826,000	1,960,000	4.04				M_170577_939688
353	07/14/2022	96_1	GEORGE, CURIOUS	DREW, NANCY	32		FROST AVE	101	O	750,000	826,000	1,960,000	2.61				M_170577_939688



Example of correct use for NAL R

jur_code	sale_date	parcel_id	seller	buyer	st_num	st_alpha	st_name	prop_type_id	nal_code	sale_price	assessment_value	proposed_value	as_ratio	outlier	time_trend	Comment	Location ID
353	01/02/2022	96_2	CHOCOLATE, CHARLIE	CATERPILLAR, HUNGRY	1		JURASSIC AVE	101	R	699,000	626,000	703,000	1.01				M_170577_939688
353	07/14/2022	96_2	CATERPILLAR, HUNGRY	BEDELIA, AMELIA	1		JURASSIC AVE	101	R	725,000	626,000	703,000	0.97				M_170577_939688
353	12/20/2022	96_2	BEDELIA, AMELIA	POOH, WINNIE	1		JURASSIC AVE	101		735,000	626,000	703,000	0.96				M_170577_939688





LA3 Common NAL Sale Coding Helpful Hints- G and V Codes

G is a piece or part of the assessed unit and V is a package or bulk sale of multiple parcels



G vs. V



G- sale of a portion of the assessed unit. Common use is when a sale parcel is located in multiple municipalities.

Sale comment recommended.

jur_code	sale_date	parcel_id	seller	buyer	st_num	st_alpha	st_name	prop_type_id	nal_code	sale_price	assessment_value	proposed_value	as_ratio	outlier	time_trend	Comment	Location ID
353	07/31/2022	96_5	LOU WHO, CINDY	SEUSS, DOCTOR	999		SNOW ST	101	G	249,000	199,000	235,000	0.94			PORTION IN PRESCOTT	M_170577_939688






LA3 Common NAL Sale Coding Helpful Hints- G and V

V- Sale of multiple parcels. Same comment recommended. List other parcels included in the sale.

Sort by buyer name to find if you have a V sale without a pair.

All V sales that occur in the base year of the sales analysis period should have at least 1 companion.

Example of a sale in base year 2022 without a pair

jur_code	sale_date	parcel_id	seller	buyer	st_num	st_alpha	st_name	prop_type_id	nal_code	sale_price	assessment_value	proposed_value	as_ratio	outlier	time_trend	Comment	Location ID
353	07/31/2022	96_6	SEUSS, DOCTOR	CAT IN THE HAT LLC	0		SNOW ST	132 V		750,000	12,000	12,000	0.02				M_170577_939688

Here is the missing companion sale- this sale needs to be V coded and comments should be used on both sales

353	07/31/2022	96_42	SEUSS, DOCTOR	CAT IN THE HAT LLC	500		SNOW ST	101		750,000	689,000	712,000	0.95				M_170577_939680
-----	------------	-------	---------------	--------------------	-----	--	---------	-----	--	---------	---------	---------	------	--	--	--	-----------------

Here is an example of a correct use of the V code

jur_code	sale_date	parcel_id	seller	buyer	st_num	st_alpha	st_name	prop_type_id	nal_code	sale_price	assessment_value	proposed_value	as_ratio	outlier	time_trend	Comment	Location ID
353	01/31/2022	96_7	OVERLOOK INC	SPOOKY LLC	1515		SHINING ST	300 V		3,589,000	2,744,000	2,355,000	0.66			SOLD W 96_8	M_170577_939688
353	01/31/2022	96_8	OVERLOOK INC	SPOOKY LLC	1550		SHINING ST	326 V		3,589,000	826,000	777,000	0.22			SOLD W 96_7	M_170577_939688



LA3 Common NAL Sale Coding Helpful Hints- N

N= Non Arms Length sale but No other code fits

N= Needs a Note; must have a sale comment to explain

N. Other, when a non-arm's length sale does not fall into any other category, this code is used, accompanied by a written explanation and/or comparable sales analysis.

Do NOT use N if another NAL code will work

Don't be afraid to use N if you really feel in good faith that the sale is not valid

Do NOT enter "SOLD AS IS" as a sale comment.





LA3 Common NAL Sale Coding Helpful Hints- N

When the assessors has exhausted reasonable sales verification efforts and still feels the sale is not valid.

Residential Sales

Can use the N code and list 3 comparable sales to support

jur_code	sale_date	parcel_id	seller	buyer	st_num	st_alpha	st_name	prop_type_id	nal_code	sale_price	assessment_value	proposed_value	as_ratio	outlier	time_trend	Comment	Location ID
353	07/10/2022	96_50	ROSE, DAISY	MILLER, DUSTY	23		FLOWER ST	101	N	550,000	690,000	713,000	1.30			SEE COMPARABLE SALES 96_49, 96_82, 96_63	M_170577_939682
353	07/15/2022	96_49	VIOLET, JASMINE	LILY, TIGER	45		GARDEN RD	101	N	745,000	699,000	754,900	1.01				M_170577_939694
353	06/25/2022	96_82	ROSE, DAISY	IVY, IRIS	3		ACRE AVE	101	N	735,900	649,000	696,000	0.95				M_170577_939645
353	08/03/2022	96_63	ZINNIA, HOLLY	ASTER, POPPY	815		PLANT PL	101	N	769,000	689,000	712,000	0.93				M_170577_939652

Commercial/ Industrial Sales

Can use the N code and list other 3 parcels valued with similar income and expense data

jur_code	sale_date	parcel_id	seller	buyer	st_num	st_alpha	st_name	prop_type_id	nal_code	sale_price	assessment_value	proposed_value	as_ratio	outlier	time_trend	Comment	Location ID
353	05/15/2022	96_04	SMILE MORE LLC	FLOSS FRESH INC	85		MAIN	342	N	946,500	685,000	702,600	0.74			SEE COMPARABLE ASSMTS INCOME APPROACH OF 42 MAIN, 96 MAPLE, 589 MAIN	M_170577_939444



LA3 Common NAL Sale Coding Helpful Hints- B

NAL B: An intra-corporation sale, e.g between a corporation and its stockholder, subsidiary, affiliate, or another corporation whose stock is in the same ownership

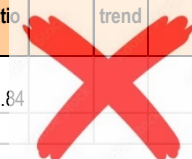
Subsidiary: company that belongs to another company, AKA a parent or a holding company. Generally the parent owns 50% of more of the subsidiary.

If a corporation owns less than a 50% stake, the corporation is referred to as an associate or affiliate company.

Use corporate databases and internet to verify validity of sales.

Example of incorrect use of NAL B; here the sale parties are unaffiliated with each other:

jur_code	sale_date	parcel_id	seller	buyer	st_num	st_alpha	st_name	prop_type_id	nal_code	sale_price	assessment_value	proposed_value	as_ratio	outlier	time_trend	Comment	Location ID
353	07/14/2022	96_4	GOOD BUILDER LLC	DAVE DEVELOPER INC	400		HAMMER ST	130	B	1,200,000	800,000	1,011,000	0.84				M_170577_939688



Correct use of NAL B.

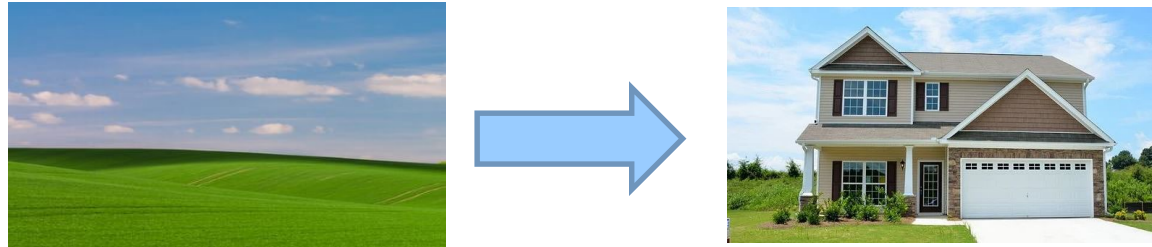
jur_code	sale_date	parcel_id	seller	buyer	st_num	st_alpha	st_name	prop_type_id	nal_code	sale_price	assessment_value	proposed_value	as_ratio	outlier	time_trend	Comment	Location ID
353	05/27/2022	96_3	PEPSICO	FRITO LAY CO	30		SNACK AVE	400	B	4,375,000	2,750,000	2,689,000	0.61				M_170577_939688





NAL P

NAL P is a sale of a property with a change in use when compared to its use on the assessment date.



jur_code	sale_date	parcel_id	seller	buyer	st_num	st_alpha	st_name	prop_type_id	nal_code	sale_price	assessment_value	proposed_value	as_ratio	outlier	time_trend	Comment	Location ID
353	03/14/2022	96_701	BROWN, FARMER T.	STICKS N STONES LLC	78		COWBELL LN.	130 P		243,000	186,000	963,500	3.97				M_170577_939744
353	10/04/2022	96_701	STICKS N STONES LLC	HOMEOWNER, HUGH	78		COWBELL LN.	101		1,045,000	186,000	963,500	0.92				M_170577_939744



The Property Type ID (Use Code) on the LA3 **must always be the current use**, not the use at the time of sale.

jur_code	sale_date	parcel_id	seller	buyer	st_num	st_alpha	st_name	prop_type_id	nal_code	sale_price	assessment_value	proposed_value	as_ratio	outlier	time_trend	Comment	Location ID
353	03/14/2022	96_701	BROWN, FARMER T.	STICKS N STONES LLC	78		COWBELL LN.	101 P		243,000	186,000	963,500	3.97				M_170577_939744
353	10/04/2022	96_701	STICKS N STONES LLC	HOMEOWNER, HUGH	78		COWBELL LN.	101		1,045,000	186,000	963,500	0.92				M_170577_939744





NAL O

Sale of a property when substantial physical change has occurred. The Sale Price and Proposed Value don't represent the property with the same physical characteristics. (No longer comparing apple to apple.)

Make sure when using this code that your assessment is "finalized"; all property data has been entered and updated as of your assessment date . Map changes, permits, fire, new construction, demolitions, etc.

Best practice to use a sale comment to explain what happened.

Examples:

- Property sells for \$480,900 on 02/17/2022. Permit for garage addition pulled after sale and construction completed by 10/01/2022. Garage addition adds \$50,000 in value. NAL O



assessed unit at time of sale 2/17/2022



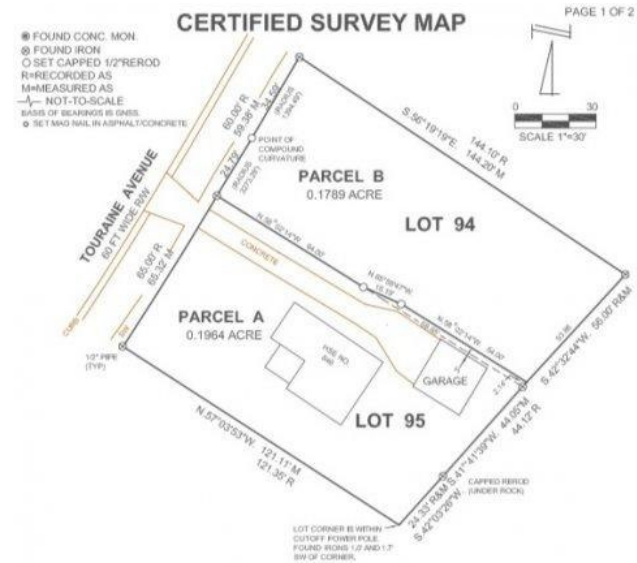
assessed unit as of assessment date 1/1/2023

jur_code	sale_date	parcel_id	seller	buyer	st_num	st_alpha	st_name	prop_type_id	nal_code	sale_price	assessment_value	proposed_value	as_ratio	outlier	time_trend	Comment	Location ID
353	02/17/2022	12_234	BLANEY, RYAN	CINDRIC, AUSTIN	500		DAYTONA ST	101	O	480,900	480,000	530,000	1.10			permit for garage	M_170577_956239



NAL O Examples

2. Another property sells on 06/03/2022 for \$350,000. In July of 2022, the new owner records a plan and sells off part of their lot. NAL O.



jur_code	sale_date	parcel_id	seller	buyer	st_num	st_alpha	st_name	prop_type_id	nal_code	sale_price	assessment_value	proposed_value	as_ratio	outlier	time_trend	Comment	Location ID
353	06/30/2022	04_567	WRANGLER, JOE	HAPPY DUCKING LLC	3		JEEP AVE	101	O	350,000	280,000	265,000	0.76			LOT SPLIT AFTER SALE	M_180666_014644



Price Quartiles

Price Quartiles- show Regression or Progression. Demonstrate the consistency of the level of assessment by stratifying by pricing groups.

Quartiles- 40+ sales

Halves- 20 to 40 sales

Simplified example (sample size is insufficient) to demonstrate regression:

jur_code	sale_date	parcel_id	seller	buyer	st_num	st_alpha	st_name	prop_type_id	nal_code	sale_price	assessment_value	proposed_value	as_ratio	outlier	time_trend	Comment	Location ID
353	02/22/2022	4_58	BERRY, BILL	CAKE, CASSANDRA	1		BROOK AVE	101		260,000	233,900	263,500	1.01				M_170577_939750
353	07/07/2022	100_100	PASTA, PETER	CASSEROLE, CASEY	3		BAY DR	101		279,000	258,000	273,400	0.98				M_170577_939751
353	12/23/2022	36_91	SPAGHETTI, SAVANNAH	TOMATO, TINA	9		POND RD	101		389,000	325,600	369,500	0.95				M_170577_939749
353	03/03/2022	23_2	LETTUCE, LISA	JELLO, JACOB	4		OCEAN AVE	101		498,000	462,500	478,200	0.96				M_170577_939748
353	05/12/2022	62_93	MAPLE, MARVIN	KETCHUP, KIM	8		BOGGY LN	101		750,000	675,400	704,300	0.94				M_170577_939746
353	06/16/2022	5_90	PITA, PAULA	HUMMUS, HENRY	6		RIVER TERR	101		829,000	742,400	785,800	0.95				M_170577_939747
353	04/08/2022	85_145	APPLE, ANNE	BURRITO, BETTY	5		LAKE ST	101		910,000	729,000	800,000	0.88				M_170577_939745
353	10/04/2022	96_701	TACO, TIMOTHY	BURGER, BENJAMIN	7		BEACH AVE	101		1,045,000	186,000	930,000	0.89				M_170577_939744
												Median	0.95			Price Q1	1.00
												COD	3.26			Price Q2	0.96
												Mean	0.94			Price Q3	0.94
												WMean	0.73			Price Q4	0.88
												PRD	1.30				

Price Quartiles statistics should be between 90 to 110% and be within 5% of the class median.

How to check your price quartiles:

Run in your CAMA system reports, in the LA3 Macros, or upload your LA3 and run in DLS Gateway.

All 3 may have slightly varying calculations however note that Gateway is what we use to determine the price quartile statistics.



Date Quartiles

Date Quartiles- show how the market changed over the sales analysis period.

Helps to see if a time adjustment to sale would be helpful.

The Current Time Trend Analysis is used by BLA to check that the trend you used to time adjust the sale prices in your LA3 is acceptable.

The Proposed Time Trend Report is used by the Assessor to analyze the unadjusted sales and develop a time trend.

DLS Youtube Video

<https://www.youtube.com/watch?v=BPYRt4qWgvU&t=44s>





LA3 Review Tips

Use the DLS LA3 macros to check.

BLA Advisors appreciate sale comments! 😊 Make them relevant and understandable.

No blanks in the LA3 cells- check new condos and new parcels for:

Current assessed values can't be blank; must enter as zero "0"

No blanks or "n/a" as seller/buyer names; all sales need grantor and grantee!

Read and review each valid sale, line by line. Looking at the buyer and seller names is an easy double check.

jur_code	sale_date	parcel_id	seller	buyer	st_num	st_alpha	st_name	prop_type_id	nal_code	sale_price	assessment_value	proposed_value	as_ratio	outlier	time_trend	Comment	Location ID
353	04/16/2022	4_58		BRYAN, LUKE	14		OUTLAW AVE	130	U	453,000		275,000	0.61				M_170577_939750
353	09/27/2022	100_100		PARTON, DOLLY	9		WESTERN WAY	131	T	1,100,000	548,000	601,300	0.55				M_170577_939751
353	02/10/2022	36_91	BROOKS, GARTH	CHURCH, ERIC	39		GUITAR WAY, UNIT 5	102		339,000	301,000	336,500	0.99				M_170577_939748
353	09/21/2022	36_91	CHURCH, ERIC	UNDERWOOD, CARRIE	39		GUITAR WAY, UNIT 5	102		363,000	301,000	336,500	0.93				M_170577_939748
353	10/27/2022	62_93	MCENTIRE, REBA	RHETT, THOMAS	42		COUNTRY LANE	130	V	525,000	145,000	157,800	0.30				M_170577_939746
353	08/31/2022	5_90	NASHVILLE SAVINGS BANK	MCGRAW, TIM & HILL, FAITH	209		HONKY-TONK RD	101		749,000	999,000	1,014,000	1.35				M_170577_939747

Reviewer Questions
missing seller name, is prior value zero?
missing seller name
NAL R, see subsequent sale
2022 V sale without a pair
NAL L, see seller name



The LA3 – Points to Ponder

More than 1 NAL code may fit a sale

It shows us what values changed and what values did not change. Statistics tell BLA how much the sale and non-sale properties increased or decreased.

We can see how much the non-sale properties increased or decreased by looking at the NAL sales and the LA4 comparison Report. Unless you had a lot of new homes and condos, these changes should be similar.

The LA3 data also can show us some of your growth

Make sure your CAMA system tables for NAL and Use codes reconcile to our latest update to the Classification Code Booklet!

Whose job? Assessor or Vendor

Remember where the process all starts: GIGO (Garbage In, Garbage Out)

The person entering the deeds and certificates of title should be trained as the “sales investigator”. If that’s the Assessors Clerk or an Administrative Assistant, then they should be fully trained on the LA3.

Buyer and Seller names should be entered in the CAMA system following a standard protocol for the ownership type: Last, First not First Last, also when property in trust, life estate, multiple owners, etc.



Producing your LA3

Find the correct LA3 report in your CAMA system.

Extract the report in Excel *for the dates of the sales analysis period for all classes.*

Remember to include the GIS Loc ID and any sale comments

Sort the report by class (property type id) and sale date to remove the additional 12 months of sales in classes that did NOT require more than the base year for the analysis.

Review and proof the LA3 - see tips in this presentation

Save the file. Make a note of file name and where you saved it!

Copy each sale row into the LA3 upload template then bulk upload into DLS Gateway

Know how many sales records you should have!



Your LA3 must contain columns

A – R

Ready for Review



The LA3 Format

Found in Classification Code Book

Data Layout Example

Columns

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
jur_code	sale_date	parcel_id	seller	buyer	st_num	st_alpha	st_name	prop_type_id	nal_code	sale_price	assessment_value	proposed_value	as_ratio	outlier	time_trend	comments	Location Id
001	05/03/2015	8-0-28	Smith John	Jones Paul	121		Woodland St	101		470,000	390,000	447,500	0.95		485,000		123AB456BC90
001	12/22/2015	12-0-160A	Harrison W.	Raycroft B.	83	A	Forest St	102		320,000	270,000	332,000	1.04		320,000		123AB465BC275
001	07/12/2015	6-0-156	Johns P	Bradley A	13		Ralph Ave	104	N	125,000	185,000	170,000	1.36		125,000	Short Sale	123AB376BC1
001	06/18/2015	3-0-66	Bartlett Co.	Miller William	175		Maple St	101	P	225,000	220,000	475,000	2.11		230,900		123AB258C10

Row Headings should be on one line (wrapped if necessary) labeled exactly as above

see note below

	Column Heading	Description	Format
Column A	jur_code	DOR community ID number	Text column - Three digits
Column B	sale_date	Date of sale	Date column - mm/dd/yyyy
Column C	parcel_id	Community identification	No special format - up to 30 Characters*
Column D	seller	Grantor of the property	No special format - up to 40 Characters*
Column E	buyer	Grantee of the property	No special format - up to 40 Characters*
Column F	st_num	Street number of the property	Numeric - up to 10 digits
Column G	st_alpha	For any text character part of st_num	Text Column up to 5 Characters
Column H	st_name	Name of the street, road etc.	Maximum Length - 40 Characters
Column I	prop_type_id	State use code of property	Text column - 3 Characters **
Column J	nal_code	Non-arms Length Code	Text column - up to 3 Characters ***
Column K	sale_price	Sale Price of the property	Numeric *
Column L	assessment_value	Prior Fiscal Year Assessment	Numeric *
Column M	proposed_value	Proposed current Fiscal Year Assessment.	Numeric *
Column N	as_ratio	Assessment Sales Ratio	Numeric with 2 place decimal
Column O	outlier	DOR use only, should be blank for all entries	
Column P	time_trend	(If applicable) Time-Adjusted Sales Price.	Numeric ****
Column Q	Comments	Explanation of "N" codes or other as needed	Text
Column R	Location ID	Location ID - GPS Based	AlphaNumeric - up to 255 Characters*

- * No entry can be blank.
- ** This should reflect the property's class code as of the proposed assessment date, not what it was at the time of the sale.
- *** Must be left blank for all valid sales.



Bulk Upload of the LA3

Open your Excel sales file that was exported from your CAMA system.

Copy all the sale rows in the LA3 Upload Template

Name and save the LA3 Upload Template to your desktop

Log into DLS Gateway and click the LA3 tab. Click Bulk Upload from the menu on the left.

Bulk Records Upload

Bulk Records Upload

Status: LA-3 Interim Year : NO STATUS FOUND

TaxRate - Interim Year Adjustment : NO STATUS FOUND

ACTON - 002 2024

Jurisdiction Fiscal Year Process

Date Range: 1/1/2022 - 12/31/2022 1/1/2021 - 12/31/2022 7/1/2021 - 6/30/2023

Is Sales Data Time Trended:

Select Document No file chosen



Editing Sales in the LA3

Your advisor has flagged a few sales that you need to make edits on.

1. Make the changes in your CAMA system
2. Make the changes in your sales file (Excel file)
3. Make the changes in DLS Gateway to your uploaded and unlocked LA3 using the Search/Update/Delete tool

Parcel Id	<input type="text"/>		
Sale Date From	<input type="text"/> (mm/dd/yyyy)	Sale Date To	<input type="text"/> (mm/dd/yyyy)
Sale Price From	<input type="text"/>	Sale Price To	<input type="text"/>
Buyer Name	<input type="text"/>	Seller Name	<input type="text"/>
Current Year ASR From	<input type="text"/>	To	<input type="text"/>
Street Name	<input type="text"/>	Is Time Trended Only	<input type="checkbox"/>
Repeat Sales Only	<input type="checkbox"/>	Duplicate Names Only	<input type="checkbox"/>

Class	<input type="text" value="MULTIPLE USE"/> <input type="text" value="RESIDENTIAL"/> <input type="text" value="OPEN SPACE"/> <input type="text" value="COMMERCIAL"/>	Property Type List	<input type="text" value="012"/> <input type="text" value="013"/> <input type="text" value="014"/> <input type="text" value="016"/>	Property Group	<input type="text" value="013"/> <input type="text" value="031"/> <input type="text" value="013 & 031"/> <input type="text" value="013-043"/>
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Current Year NAL Code	<input type="text" value="Valid Sales - Code is Blank"/> <input type="text" value="Invalid Sales - NAL Sales"/> <input type="text" value="A"/> <input type="text" value="A1"/>
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<input type="button" value="Search"/>	<input type="button" value="Clear Search Criteria"/>	<input type="button" value="Reset Sort"/>
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How to delete LA3 from Gateway

Sometimes you need to start over with a new sales file.

Your advisor can unlock the LA15 and LA3.

You have to delete the old sales file from 2 places in Gateway:

1st Delete the sale records from the Search/Update/Delete page

In Search/Update/Delete page, click Search

After all your sale records come up, scroll to the bottom of the page and click

Delete Searched data

2nd Delete the Uploaded File from the Bulk Upload page.

Click

Delete Uploaded File





The Interim Year Approval Process

Update your communities Local Officials Directory and do the Assessors Certification with your Town/City Clerk for the fiscal year you will be working on

Revised and Omitted and Audited Personal Property

Amended New Growth LA13A

LA3

LA15- auto populated by the LA3.

LA4 with a copy of your CAMA system LA4 uploaded in the Current Documents and Board of Assessor Authorization/Signatures

LA13 with New Growth Template uploaded to Current Documents

Classification Hearing

Tax Rate

Make life easier on your office- Submit all your

Gateway Reports ***early*** for your Advisor to review, including your LA3!

