

Adding a Rebate

Opening "Add Rebate" Form

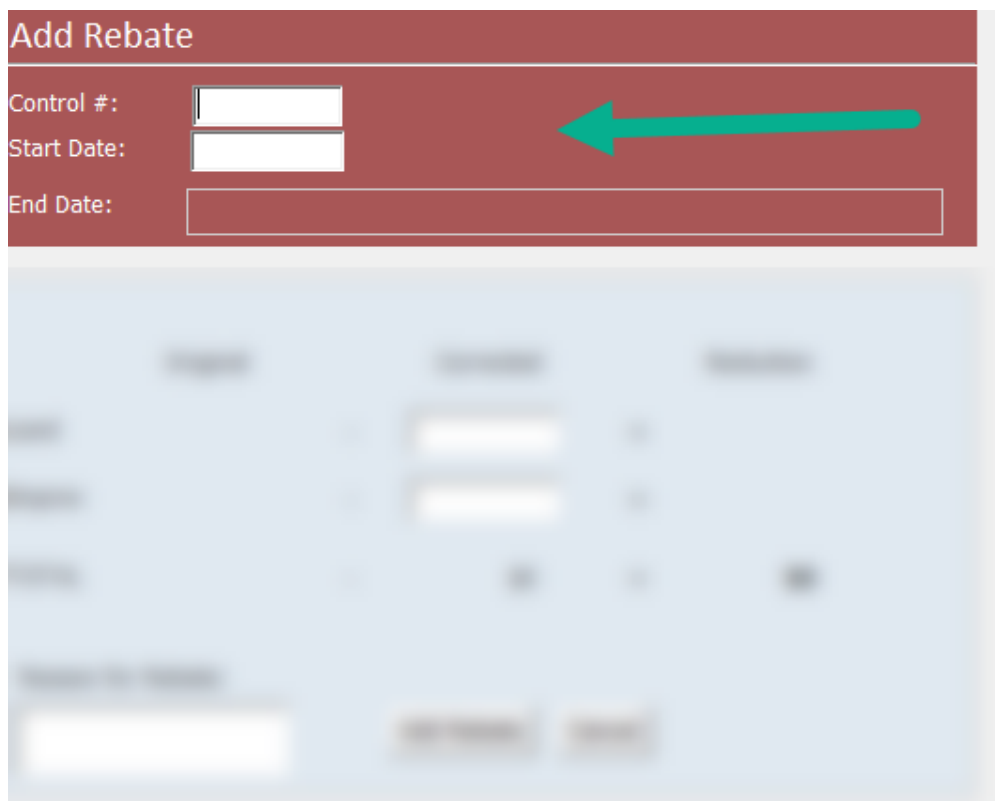
To add a rebate, you must first open the "Add Rebate" form.

1. Navigate to the bottom-left corner of the "Rebate Search Results" lookup form.
2. Click on the grey "Add Rebate" button.
3. The "Add Rebate" form will appear

A Look at the "Add Rebate" Form

Let's take a look at the "Add Rebate" form and all of its fields.

The Red Section:



The screenshot shows the "Add Rebate" form. The top section is a dark red header with the title "Add Rebate". Below the header, there are three input fields: "Control #:", "Start Date:", and "End Date:". A green arrow points to the "Start Date:" field. The rest of the form is blurred.

The "red section" or top section of the form contains the following:

- A field to input the property owner's control number
- The start date (effective date) of the rebate

- An uneditable end date that is calculated based on the next assessment, next tax period, or if the parcel has been eliminated/merged.

The Blue Section:

	Original	Corrected	Reduction
Land	-	<input type="text"/>	=
Improv	-	<input type="text"/>	=
TOTAL	-	\$0	= \$0

Reason for Rebate:

The "blue section" or lower section of the form contains the following:

- A matrix that stores the Original, Corrected, and Reduction amounts of the assessment that a rebate is being created on.
- Within the matrix, two corrected value fields: one for corrected land value and one for corrected improvement value.
- A field to input the reason for the rebate.
- An "Add Rebate" button (cannot add the rebate until all fields on the form are filled).
- A "Cancel" button (closes the form).

Entering Owner Information

Let's add a new rebate.

1. Enter a Control Number into the "Control #" field.

Add Rebate

Control #:

Start Date:

End Date:

2. Enter a Start Date into the "Start Date" field. For this demonstration, let's imagine a rebate needed to take effect starting at the beginning of the 2015 municipal tax billing year.

Add Rebate

Control #:

Start Date:

End Date:

3. Press Enter and the current assessment information will load into the form:

Add Rebate

Control #: MICHAEL J & ALLISON M WOLFE

Start Date: Current Assessment Effective: 7/1/2008 House

End Date: New Assessment Effective: 7/1/2016 Wood deck

House

	Original		Corrected		Reduction
Land	\$31,700	-	<input type="text"/>	=	
Improv	\$140,500	-	<input type="text"/>	=	
TOTAL	\$172,200	-	\$0	=	\$0

Reason for Rebate:

Original Assessment Information

Let's analyze the information the "Add Rebate" form displayed.

Add Rebate

Control #:

Start Date:

End Date:

House

	Original		Corrected		Reduction
Land	\$31,700	-	<input type="text"/>	=	
Improv	\$140,500	-	<input type="text"/>	=	
TOTAL	\$172,200	-	\$0	=	\$0

Reason for Rebate:

In the Cyan Box: The property owner(s)' full name.

In the Yellow Box: The date and reason of the current assessment the rebate is taking effect on (in this case, the property owner's house whose assessment took effect on 7/1/2008).

In the Purple Box: The current assessment's end date and the reason for the particular end date (In this case, the end date for the current assessment is 6/30/2016 because the software found a new assessment effective as of 7/1/2016 for the addition of a wood deck).

In the Red Box: The original land and improvement assessment values and their total sum.

Entering Corrected Values

For this demonstration, let's imagine a large, dead tree fell during a heavy snowstorm and landed on the property owner's house. The house suffered severe damages and needs to be re-roofed. Upon reevaluation of the property, its improvement value has been reassessed to \$125,000.

In the Blue Matrix:

The land assessment has not changed, so we can enter the same value as the original value into the "Corrected Land" field.

Add Rebate

Control #: MICHAEL J & ALLISON M WOLFE
Start Date: Current Assessment Effective: 7/1/2008 House
End Date: New Assessment Effective: 7/1/2016 Wood deck

House

	Original		Corrected		Reduction
Land	\$31,700	-	<input type="text" value="\$31,700"/>	=	\$0
Improv	\$140,500	-	<input type="text"/>	=	
TOTAL	\$172,200	-	\$31,700	=	\$0

Reason for Rebate:

The improvement assessment *has* changed, so we can enter the new, corrected value of \$125,000 into the "Corrected Improvement" field

Add Rebate

Control #: MICHAEL J & ALLISON M WOLFE
Start Date: Current Assessment Effective: 7/1/2008 House
End Date: New Assessment Effective: 7/1/2016 Wood deck

House

	Original		Corrected		Reduction
Land	\$31,700	-	<input type="text" value="\$31,700"/>	=	\$0
Improv	\$140,500	-	<input type="text" value="\$125,000"/>	=	\$15,500
TOTAL	\$172,200	-	\$156,700	=	\$15,500

Reason for Rebate:

Notice how the running "Reduction" total is displayed in bold as this is the amount the rebate will be calculated on.

Add Rebate

Control #: MICHAEL J & ALLISON M WOLFE
Start Date: Current Assessment Effective: 7/1/2008 House
End Date: New Assessment Effective: 7/1/2016 Wood deck

House

	Original		Corrected		Reduction
Land	\$31,700	-	<input type="text" value="\$31,700"/>	=	\$0
Improv	\$140,500	-	<input type="text" value="\$125,000"/>	=	\$15,500
TOTAL	\$172,200	-	\$156,700	=	\$15,500

Reason for Rebate:

Entering Reason for Rebate and Adding the Rebate

At the bottom-left corner of the blue matrix, we can add our reason for the rebate in the field. Let's put, "tree collapsed roof, storm damage."

House	Original		Corrected		Reduction
Land	\$31,700	-	<input type="text" value="\$31,700"/>	=	\$0
Improv	\$140,500	-	<input type="text" value="\$125,000"/>	=	\$15,500
TOTAL	\$172,200	-	\$156,700	=	\$15,500

Reason for Rebate:

Before clicking "Add Rebate," let's ensure we filled in all the information we need:

- The Control Number
- The Rebate Start Date
- The Corrected Land Value
- The Corrected Improvement Value
- The Reason for Rebate

Add Rebate

Control #: 109150 MICHAEL J & ALLISON M WOLFE
Start Date: 1/1/2015 Current Assessment Effective: 7/1/2008 House
End Date: 6/30/2016 New Assessment Effective: 7/1/2016 Wood deck

House

	Original		Corrected		Reduction
Land	\$31,700	-	<input checked="" type="checkbox"/> \$31,700	=	\$0
Improv	\$140,500	-	<input checked="" type="checkbox"/> \$125,000	=	\$15,500
TOTAL	\$172,200	-	\$156,700	=	\$15,500

Reason for Rebate:
 tree collapsed roof, storm damage.

If you have filled all the required fields you can click the grey "Add Rebate" button.
Note: This will cause the "Edit Rebate" form to open.

Data You Cannot Enter

You cannot enter the following data into the "Add Rebate" form:

1. A rebate start date that exists more than seven years ago
2. A rebate start date that exists before a recorded assessment
3. A rebate start date that exists after a parcel has been eliminated or merged
4. An unfinalized rebate that shares the same start date
5. A future date
6. Blank fields

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