

# Adding a Rebate

## Opening "Add Rebate" Form

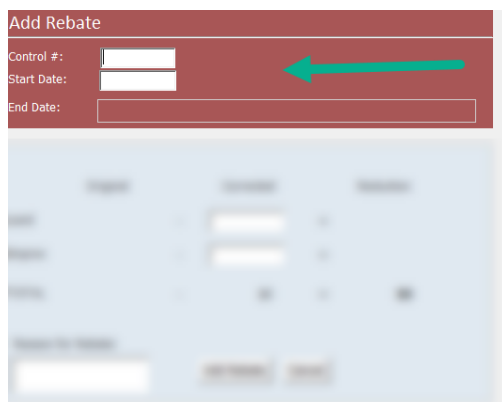
To add a rebate, you must first open the "Add Rebate" form.

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 top portion of the 'Add Rebate' form, which has a dark red header. Below the header, there are three input fields: 'Control #:', 'Start Date:', and 'End Date:'. A green arrow points to the 'Control #' 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.
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.
3. Press Enter and the current assessment information will load into the form.

## Original Assessment Information

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

## Add Rebate

Control #:  MICHAEL J & ALLISON M WOLFE

Start Date:  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 type="text"/> | = |            |
| Improv       | \$140,500        | - | <input type="text"/> | = |            |
| <b>TOTAL</b> | <b>\$172,200</b> | - | <b>\$0</b>           | = | <b>\$0</b> |

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"/>                  | = |            |
| <b>TOTAL</b> | <b>\$172,200</b> | - | <b>\$31,700</b>                       | = | <b>\$0</b> |

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        |
| <b>TOTAL</b> | <b>\$172,200</b> | - | <b>\$156,700</b>                       | = | <b>\$15,500</b> |

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        |
| <b>TOTAL</b> | <b>\$172,200</b> | - | <b>\$156,700</b>                       | = | <b>\$15,500</b> |

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        |
| <b>TOTAL</b> | <b>\$172,200</b> | - | <b>\$156,700</b>                       | = | <b>\$15,500</b> |

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
— □ ×

**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        |
| <b>TOTAL</b> | <b>\$172,200</b> | <b>-</b> | <b>\$156,700</b>                              | <b>=</b> | <b>\$15,500</b> |

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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