Upset Sale Menu

Number Preview

Number Preview produces a report that allows the user to preview which properties that will be included in the Upset Sale along with the current taxes and costs. It does not make any permanent changes and is not a required step. This report is included so that Tax Claim can review the properties to be included prior to making the frozen copy of the sale file and possible take some action to include/exclude a property from the sale. This report can be run for a single township, or by leaving the township blank when prompted, the entire county.

Partial Payment

This report lists properties will be included in the Upset Sale that have received a partial payment on a tax year. The receipt of a partial payment indicates that there might be a Stay of Sale agreement in place for the property. If this is the case then the property should be flagged so that it is excluded from the sale. This step makes no permanent change to the files and is not required.

Assign Sale

This process will create a Sale record and assign an upset sale number to all unflagged properties marked as Preupset with an unpaid tax claim from a year prior to the current one. If the system detects that Sale records have already been created for this sale year it will offer to delete the existing records and create them over again. It may be necessary to do this if significant changes have been made since the Sale records were created but it should not be done once the Export Upset Data step has been performed.

Apply Upset Cost

This process will post Upset costs to active Upset Sale properties. The program will provide defaults for the fee and description which the user can change if desired. In order for a property to be considered an active Upset Sale property it must have a status of pre-upset, have an outstanding tax claim prior to the latest tax claim year, have no flags and have a Sale record for the current year.

Calculate Upset Price

This step will calculate the Upset Sale Price and save/update it on the Sale record and if the permanent

Upset file has been created it will update it there as well. This process should not be performed after the Upset Sale. In addition to unpaid Tax Claims and Costs this calculation takes into account current year taxes, a recording fee and calculates the transfer tax as two percent of the current assessed value. If the property is marked as a Mobile Home no recording fee is calculated.

The program asks for a date to calculate interest through. This date should be in the same month as the upset sale. The exact date is not important, since the program only calculates interest on a monthly basis.

Upset Checks

This steps performs the following checks to make sure none of the data required for the Upset is missing. Every Party to the sale must have its Type of Entity filled in, e.g. Individual, Joint, etc. Every Party must have its sequence number filled in and it must be unique. There must be at least one party to serve. Joints and Partnerships are not served. Any problems found here must be corrected before performing the Export Upset Data step.

Export Upset Data

This process will copy the upset properties to a permanent record. By doing this we can reprint Upset Sale Notices in the future with the same information they originally contained. If you have already exported the properties, the previous export will be deleted and replaced with this one. You should not perform this process after you have sent the Upset Notice data for printing.

Upset Sale Master

This creates the Upset Sale Master, a printed copy of the properties available for sale with the details of the sales price.

Notice Count

This process will display a count for the total number of Upset Notices that will be created using either the Upset Sale Notice button or the Export for Printing button. It takes into account that the property must currently have a status of pre-upset, have an outstanding tax claim prior to the latest tax claim year, have no flags and have a Sale record for the current year. This means if any payments have been accepted or flags added the Notice Count may decrease.

Export to Mailers

This process was created in order to export mailing information to a file where it could be pre-processed by the Mailers program. This might be used by a county that prints its own Upset Sale Notices and has access to the Mailers program.

Import Mailers

This process was created in order to import mailing information from a file after it was pre-processed by the Mailers program. This might be used by a county that prints its own Upset Sale Notices and has access to the Mailers program.

Upset Sale Notice

This process produces a copy of all of the Upset Sale Notices and would be used by a county printing its own notices. It takes into account that the property must currently have a status of pre-upset, have an outstanding tax claim prior to the latest tax claim year, have no flags and have a Sale record for the current year. This means if any payments have been accepted or flags added the number of notices printed may decrease. It can also be used to attach a PDF copy of each Upset Sale Notice to the scanned documents for the property. If it is used this way then the export to PDF function should be used at the same time as the Export for Printing.

Export For Printing

This process will create a text file named UpsetData.txt that contains the data necessary to print the Upset Sale Notices. The location of the file is displayed in a message after the file is created. You will need to send/email this file to the vendor who prints your notices.

Apply Mail Cost

Some counties apply a separate Mailing Cost for mailing Upset Notices. If you want this Mailing Cost included in the Upset Sale Price then this step and an Calculate Upset Price must be performed before you Export for Printing. This process takes into account that the property must currently have a status of pre-upset, have an outstanding tax claim prior to the latest tax claim year, have no flags and have a Sale record for the current year. This means if any payments have been accepted or flags added the number of notices affected may decrease unless it is performed at the same time as the the Export for Printing step.

Upset Sale Ad Copy

This step produces a report with the copy for the newspaper advertisement of the Upset Sale. This process takes into account that the property must currently have a status of pre-upset, have an outstanding tax claim prior to the latest tax claim year, have no flags and have a Sale record for the current year. This means if any payments have been accepted or flags added the number of notices exported may decrease.

Export Ad Copy

This step creates a text file containing the advertising copy and may be convenient for the newspaper and reduce transcription errors because the text can be copy and pasted.

Set Sale Date

This process sets the Sale Date on the Sale records and on the permanent copy of the upset records. This step may be re-run if the upset sale needs to be rescheduled.

Posting Notice

This process creates an **Upset Notice** that can be used to post a property. This process takes into account that the property must currently have a status of pre-upset, have an outstanding tax claim prior to the latest tax claim year, have no flags and have a Sale record for the current year. This means if any payments have been accepted or flags added the number of notices may decrease.

Once all properties have been posted, use this button to print an **Upset Posting Certification**. This certification is a copy of the original poster used to post the property along with preprinted signatures for the assessor who performed the posting and the county Prothonotary.

Corporate Compliance

This button produces a PA Dept. of Revenue Corporate Compliance report for all owners of Upset Sale Properties that are designated as Corporations or Partnerships.

Upset Sale Receipt

This process creates a Sale Receipt for every property still included in the Upset Sale and contains

property identification information and spaces for the name of the bidder, successful bid etc. Some counties may find it useful to have these receipts pre-printed at the sale in order to expedite processing.

Auctioneer List

This process creates a report that can be given to the auctioneer and potential bidders that includes the Upset Price and identifying information about the properties included in the sale.

Court Petition

This button provides two reports intended to help in the court proceeding to approve the sale of properties sold.

Post Sale Notice

This button produces a letter to each property owner notifying them that their property was sold at Upset Sale. While these designed to be used in window envelopes this process also produces labels that can be used to address the letters.

Mark for Posting

This process interfaces with the Wayne County GIS system to mark properties that need to be posted. This process should be run after the "Assign Sale #" process, which resets all properties to gray in the mapping program. **This process should then be run at the end of each day while properties are being posted**. This will clear the posting flag from the GIS map for properties that have been paid off or are otherwise no longer up for sale.

Reset Remail Flg

This process resets all of the Remail Flags. In the event that an Upset Sale Notice has not been properly delivered it may be necessary to attempt another mailing. To handle this each owner has check box that appears on the Property Claim Form. Checking this box will cause this owner to receive another notice in the next step Remail Notice.

Remail Notice

This process will create an Upset Sale Notice for the owners who have the Remail Flag set, *but only if the property is still eligible for upset sale*. See the prior step, Reset Remail Flg, for more details.

This button opens two reports. One is the Upset Notice to be re-mailed. The other is Post Office form PS 3877. Before the reports are previewed, the program asks for the "Certification of Mailing" fee. This fee is then printed on form PS 3877 under the column heading "(Extra Service) Fee."

When the Upset Notice report is closed, the program asks for the "cost to apply to parcels." If the notices were printed correctly and you would like to automatically apply costs for each notice re-mailed, you can enter an amount in this form. The program will then create a cost record in that amount for each notice generated. If you don't wish to use this feature, simply press Cancel and the report will close without creating any new cost records.

Import Cert

When notices are printed by an outside vendor the Certification Numbers will be returned in a text file. This process imports these Certification Numbers so that they are associated with the correct notices.

Final Notice

This process creates a Final Notice letter to the owners of properties sold at the Upset Sale.

Cert Mail Rtn Dates

This button provides access to a form where the user can record the date the card for a certified mailing is returned. The Posting Export button on this form creates a text file in the format required by Palmetto Posting. The Posting Update button creates an update file for Palmetto Posting. Counties that automatically import this information from the post office don't generally need to access this form.

Lien Search

This button creates a lien search form for a specified property that might be used by a title searcher.

Upset to Non-Repos

This process will list all of the properties that were included in the sale that did not sell. This user should review this list. When the user closes the report the program will prompt to change the status of all properties on the report from pre-upset to non-repository. If the list is correct you should answer yes to

accept the changes. If the list includes properties that should not be made non-repository then the user should refuse the prompt, add a flag to the property to be excluded before rerunning the report.

Post Office Manifest

This process creates and uploads a manifest to the post office for a certified mailing. This process is no longer in use and should be deprecated.

Personal Service

This button opens a form that lists owners in the county. This user has the option to check a box to indicate personal service. The Personal Service button on this form produces the individual notices for the owners checked.

Deed

This button produces a deed for each property sold at the Upset Sale.

Upset Not. Labels

This button produces mailing labels for each owner of a property still included in the Upset Sale.