RELEASE NOTES (PACS)

The following are PACS Release Notes for the first version of release **9.0.5.1005**.

NOTE: This *General Availability* (**GA**) version is for the period of **September 2022**.

What's New in PACS GA 9.0.55.1005

Description

1. **BETA - Levy Calculation Summary Report-9.0.55.1003 - Levy Rate Summary report See Ticket**

    We found that there was an issue with fund association in the report and the post-year funds were getting associated with every tax area instead of just a few. In the old query, this error was mostly hidden by a select distinct, but that didn't work with these post-year funds added in.

    We also made a small change to the Crystal report to sort the report records by tax area ID within each entity. It was using the natural query order before, so they seemed sorted sometimes and other times not. This should make it easier to compare report versions.

2. **Certification of Levies Report/Annexation: Road Levies Referencing City levies**

    Made changes to avoid counting levy rates multiple times in sums when levies have multiple funds

    -   In the body of the report, the levy rates are summed within the Crystal report, and I added running total formulas to count the total rates correctly.
    -   In the summaries, the total levy rates are calculated in the report's stored procedure. I fixed the issue there separately.

3. **NYL validation warning request**

    Changes made to clean out any records in the target year layer which should not be there. Completed for both Create NYL and Create FYL.

4. **Error - Report Failed Duplicate Stmt Id's**

    Corrected issue allowing a rollback on the same property for the same year-supp group.

5. **OLTP - Levy Rate Summary Report does not show all levies**

    The Levy Rate Summary report has been excluding those EXCESS levies because of the way their funds are set up. They have a begin date *after* the fund's year. The other report, Listing of Levies within Tax Area, only checks that the fund begin date is not null.

    Made these changes:

    -   Rearranged the report dialog and added a new checkbox option: "Include levy funds that begin after the assessment year"
    -   When the option is enabled, the report includes levies linked to funds that start after the assessment year. For example, a 2019 fund with a start date of 1/1/2020. The clients say that there are valid business reasons to have such funds, but this report been excluding them.
    -   In the printed report, if a city/school tax area includes one of these funds, there will be an asterisk by the total value. If the report has any such funds, a new line will appear in the last page's footer: "* Includes levy funds that started after the assessment year"
    -   Changed "True Automation" in the footer to "Harris Govern".

6. **Update Tax Stmt export to use messages at time of creation not current**

The Tax Statement Export does not use the same process which manages the statement message hierarchy in PACS. The Export process has been modified to handle existing messages.

7. **Taxable Calculation fail for DOR Exempt**

Made code change for sale details as of sale ID 0

8. **Misc Receipt Distribution Export for Voided Payment**

The Misc Receipt payment and the void have the same receipt number, modified record selection to find identify unique records.

9. **Levy Calculation Summary Report - Town, Regular Property Tax Limit amount incorrect**

Since PACS uses the refund amount to compare, but the sum of the limit & refund isn't anywhere on the report, we added a line to indicate the math. Now the Regular Property Tax Limit can be reconciled from the Levy details in PACS and a subsequent line to include the refund. That's what PACS will use in the comparison in the lower section of the report.

10. **Excise Detail Report does not Match Statement of Taxes Collected**

Code was added previously to delete records which had been voided and did not need to appear on the report. This code is still needed, but needed to be modified for when the excise was later paid again. When paid again, then the record does not need to be deleted anymore because it has been offset with a later payment. Even though the record was voided, we still need it to be retained because otherwise the payment gets added twice. If the client runs this report WITHOUT the box checked to include voids then they run the risk of balancing issues and excise reconciliation issues.

11. **REET Interest not Calculating Correctly**

Example: Sale date = 2/28/2022, Sale date + 30 days = 3/30/2022

Correct this to start charging for 1 month of interest when the posting date reaches 3/30, then 2 months on 4/30, and 3 on 5/30 …

12. **Excise Interest Not Calculating as expected**

PACS should begin charging monthly REET P&I at the date where the excise becomes late... the REET sale date plus the offset from the REET P&I definition, which is normally 30 days. It has actually not been charging until one month past that date.

It appears was introduced in Jan 2021, when making the changes to allow offsets to be in both days and months.

13. **BETA R54 Certification of Values report may need additional changes for New Construction**

Made changes so that New Construction value from U500 properties won't be counted. Optimized query for selecting records.

14. **Levy Collected - Levy with Rate Included in Rollback Bill Creation**

Modified the queries that get the list of levies for rollbacks. Levies that have a zero levy rate or are not included in levy certification are now excluded up front, to avoid any possibility of them getting a value and creating a bill.

15. BETA R54- Printing/Posting NOV Error Message in R54 Upgrade

Found some cases where the Appraisal Notice Export Queries could select output strings longer than what the export definitions allow. Corrected moving forward.

16. Billing Export File Research Full Amount Due Date and correct or add new date to export

If it is current year, and H1 is not paid, it should always reflect 4/30 as the due date for full year because they never fulfilled the April payment.

If the first half is paid on current year then full year can reflect 10/31 because the April amount is fulfilled.

On a delinquent prior year it makes no difference if it reflects April or October. Use 4/30.

17. Error Adding Fiscal Year Beg Balance

Modified coding to recognize valid duplicates and clean up validation.

18. Add verbiage to SNR Relief form for using lower value usage

**PACS is calculating the values for each property and summing them. There are properties where the frozen value is greater than the current value, and PACS allocates that as zero tax savings from the freeze. PACS uses the lower of the two. Therefore the math equation of [Value – frozen] would not represent the appropriate tax savings.

The report doesn't add up as expected because:

PACS is calculating the values for each property and summing them, rather than exactly following the worksheet instructions and calculating with the total values and rates.

There are properties where the frozen value is greater than the current value, and PACS allocates that as 0 tax savings from the freeze. PACs uses the lower of the 2. Therefore the math equation of [Value – frozen] would not represent the appropriate tax savings.

19. Error Exporting Tax Statement Run

In March of 2017 TFS#34868 was implemented to add Legal acres, benefit acres and sum of benefit acres to the tax statement export. This client does not use or run the process that populates the `property_assessment_attribute_val` table used to create the export.

Modified process to handle the scenario where the `property_assessment_attribute_val` records do not exist and still export the property.

20. Certification of Levies Report does not appear to account for proration in limits

In circumstances where there is a HLL levy rate, but the rate is then reduced by another factor such as constitutional limits, this causes the HLL rate to be shown instead of the correct rate. The final levy rate, the one shown in the Summary tab of a levy certification, takes into account all factors, including HLL.

21. Levy Certification error

Corrected the query used to populate the Summary view in the detail dialog for Captured Value Runs.

When multiple tax districts had levy codes with the same name, and they were included in certification, this bug caused the values for them to be multiplied by the number of shared code name. This was a display bug only. The actual values were correct.

22. Certification of Levies Report - Voted with Null value

Confirmed that the report didn't work properly when a levy had `[levy].voted` = NULL. The levy was effectively neither voted or non-voted, so the value wasn't included in either of them.

Adding `isnull()` to the report data generation fixed the issue.

23. Supplement Not processing taxes

When a property has changes in multiple years in the same supplement group, and the property also moves to a different tax area, the process has been capturing the tax values for years with the first tax area but failing to capture them for years with a later tax area. Correct the process to prevent this problem going forward.

24. PACS 9.0.53.1022 - Levy Certification run

When an annexation explicitly mapped a tax area to the same tax area (Clients are annexing, but reusing the same code), no pending tax area could be flagged in `[property_tax_area]`. If such an annexation was accepted before the annexation start year was created, then the annex value flag would never be set.

In `[property_tax_area]` records, the pending tax area is never allowed to be the same as the current tax area. Instead, to indicate this situation, `[effective_date]` will be set, but `[tax_area_id_pending]` will remain null. I made minor changes to the layer copy SPs to handle this. In most respects, there will be no pending tax area, since the tax area code is not changing, but the NYL process will still be able to recognize this and set the annex value flags when needed.

Any annexations that have already been accepted will still be missing any pending tax area. Those will need to be found and manually corrected.

25. Supp Roll Gain/Loss amount in question

When a property has changes in multiple years in the same supplement group, and the property also moves to a different tax area, the process has been capturing the tax values for years with the first tax area but failing to capture them for years with a later tax area. Correct the process to prevent this problem going forward.

26. Error message when waiving penalty in personal property

Resolved issue where error message was initiated when personal property staff attempted to waive the penalty when processing Supplements.

27. Personal Property Renditions not printing full address

The address window must be in a specific location to fit in the envelope and is limited to a maximum of 5 lines.

When the file_as_name was too large and word wrapped, and the address had enough content (address lines 1, 2 and 3) to all be in use the bottom line of the address would get pushed off the page since no 6th line can display.

I have modified the report to not word wrap the `file_as_name`

This allows the entire address that is necessary for a useable mailing label to be displayed in the envelope window.

28. **Error message received when removing levy penalty from some taxing districts**

The way these grids are designed, they need to be refreshed after any record is deleted. The grid row objects work based on index of the row's record in the data reader. Deleting a record shifts all the indexes after the deleted record.

The Levies grid and the REET grid on the panel use the same data reader, just filtering by a different record type. When a P&I rate is deleted from either grid, both grids need to be refreshed.

29. **PACS 9.0.53.1022 - Certification to taxroll report variance**

The immediate cause is a missing levy association. The levy was associated with PID ### at certification, but now it is not, so the report treats that like a Removal, and the Change query does not see it. We also found errors in the Value Added section of the report SQL. In cases where a property existed in sup 0, but a particular levy was only added the property after certification, the levy was being omitted from the report, causing large variances.

30. **2022 tax process - Duplicate bills were created for 30 properties**

The creating bills has been modified to handle multiple duplicate `penalty_percentage` entries by additionally filtering on the dates for that configuration. Specifically the Effective Date of the Bill generation must be (inclusively) between the start and end date on the `rendition_penalty_config` table.

31. **OLTP - 5th Address line is not printing on personal property letters**

The address window must be in a specific location to fit in the envelope and is limited to a maximum of 5 lines. When the file_as_name was too large and word wrapped, and the address had enough content (address lines 1, 2 and 3) to all be in use the bottom line of the address would get pushed off the page since no 6th line can display.

I have modified the report to not word wrap the `file_as_name`

This allows the entire address that is necessary for a useable mailing label to be displayed in the envelope window.

32. **Search> Special Assessment > displaying the 2021-2022 line 3 times - Create Bills and Statements for 2022 Tax Year**

Resolved issue with SA Calculation builder failing where code included dashes. If a database has an error like this already, a user will need to open the formula in the Calculation Builder and save it again to correct it, with the fixed version of PACS.

33. **Information on back of Statement Printed In house**

Made changes to these three tax statement report files. All three have the same taxpayer instruction text, which will print on the back of statements when this is enabled in the tax statement configuration in PACS.ADMIN. When the statement year is 2021-2022, the P&I section will have different text explaining that penalties are suspended for 2022.
Tax Statement
Tax Statement Multi Coupon
Tax Statement Taxpayer

These changes were only in the Crystal report files. Tax statement generation and tax statement export were not affected. Also, the custom statements were not changed.