

Valuations User Guide



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Pathway 3.09 (Thick Client Version)

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Overview

The Valuations system is based around the various values that are associated with a block of land.

Valuations can be loaded into the system from tapes supplied by the Valuer General department in most states.

In those States that don't have valuations supplied by the Government, Councils own Valuers or Contract Valuers may enter Valuations directly into the Valuations system for processing.

Valuation Types such as base Land Value, Rental Values and Allowances etc are able to be set up so that the Council can formulate a Rateable Value for each Assessment to Rate on. A Valuer General Number can be used to store values against and can be assigned over one to many Assessments (e.g., Strata Units) by utilising the Tenancy feature.

Tenancies provide a means of allocating proportioned Values over many Assessments with the resultant Rateable Value representing only a part of the original base Valuation.

An automatic download process (along with relevant detailed reports) is provided for those Councils using the Valuer General Department. Reports of the download include comparisons from the "last" to "this" Valuation with percentage gains or losses printed.

Multiple Valuation Years are able to be stored so that a full history of Valuations and corrections are available for display and which can be used in the NSW Late Levies facility.

Parameters

The following topic is covered in this chapter:

[Valuation Parameters](#)

Valuation Parameters

Valuations System Parameter Maintenance Form

This form enables the entry or maintenance of Valuation Parameters that affect the way Valuations are handled in the System.

System Parameter Maintenance

Valuation Module In Use: **Rates** Initial Tenancy Maintenance: ☐ Percentage ☒ Value

Tenancy Valuations Must Equal Header: ☒ VG # Percentages Must Total 100%: ☒

Valuation Tape Legislation: **New Zealand** VG # Terminology: **VG #** Council Code: **22**

Amend Valuations Allowed: ☒

Site Valuation: **RESAV** >> LVZ (auck)

Capital Improved Valuation: **CIV** >> Capital Improved

Nett Annual Valuation: **IAV** >> Nett Annual Value

VG # Valuation Update Parameters

VG Number Structure: ☐ Valuations Notices to be Published: ☐ Record Objections: ☐

VG # Separator: Field Size: **5** Roll: **5** Assessment: **05** Suffix: **2**

Match VG # with:

Insert Leading Zeros to Major Walk the Road: ☐ Insert Leading Zeros to Minor Walk the Road Number: ☐

Rental Parameters

Water Rate in the Dollar: **0.00890000** Land Tax Parameters:

Value to (\$)	Rate per \$100
50,000	0.00000000
300,000	0.35000000
1,000,000	1.65000000
999,999,999,999	3.70000000

Averaging OK Cancel

Valuations System Parameter Maintenance Form

Valuation Module In Use

Set this field to the Valuation Module to be used. Up to three options may be available for selection in this field, "Rates", "Victorian", and "New Zealand". The "Victorian" option is only be available if the Victorian Valuation Module is licensed and active. The "New Zealand" option is only be available if the New Zealand Valuation Module is licensed and active.

Initial Tenancy Maintenance Mode

Select the appropriate checkbox (percentage or value) to indicate the Initial Tenancy Maintenance mode that you wish to view on opening this function. The choices are:

- Percentage
- Value

Tenancy Valuations Must Equal Header

If this checkbox is checked on, then the sum of all of the Tenancy Valuations must equal the Prime Property Valuation. (E.g. if there is a prime property with three strata units and the Valuation of the prime property is \$200,000, then the sum of the valuations for the three individual units must total \$200,000)

Valuer General Percentages Must Total 100%

Check this box ON if when a Valuation is shared over multiple assessments, the total percentage must equal 100.

Valuer General Number Terminology

The terminology used to refer to the Valuer General Number may be user-defined. The value entered for this parameter e.g. "VG Number", will be displayed on all Forms, Reports and Error Messages in the Rates Accounting, Water Billing and Valuations modules that refer to the Valuer General Number.

Valuation Tape Legislation

Select Generic or the correct State/Country from the drop down. This will determine the file format required for importing details. When in Queensland or New Zealand mode additional parameters can also be entered. Please note that the New Zealand option is only available when the authorised function "Valuations, NZ VSP Load" is set on and the Valuation in Use setting is Rates.

Council Code

This field is only available when the "Valuation Module in Use" is set to Rates and the "Valuation Tape Legislation" is set to New Zealand. This field will be used in export files created by Pathway to identify the Council to the Office of the Valuer General (OVG) for Property and Sales Audit Extracts.

Amend Valuations Allowed

This parameter is only available when the "Valuation Module in Use" is set to "New Zealand". Set this check box on if Valuations are to be maintainable.

Site Valuation

Select the Valuation Type from the pop up that will be used for the Site Valuation. This must have already been entered in the Valuation Type Maintenance.

Capital Improved Valuation

Select the Valuation Type from the pop up that will be used for the Capital Improved Valuation. This must have already been entered in the Valuation Type Maintenance.

Nett Annual Valuation

Select the Valuation Type from the pop up that will be used for the Nett Annual Valuation. This must have already been entered in the Valuation Type Maintenance.

Valuer General Valuation Update Parameters – Match Value General Number With

This field is only available when the Valuation Tape Legislation is set to Queensland. Select the method of matching to the VG number. Valid choices are:

- Property ID
- Major & Minor Walk the Road Numbers

Valuer General Valuation Update Parameters – VG Number Structure

This field is only available when the "Valuation Module in Use" is set to Rates and the "Valuation Tape Legislation" is set to New Zealand. This field controls if the Valuer General number is to be structured. When set on additional parameters become available to define the structure of the Valuer General number.

Valuer General Valuation Update Parameters – Valuation Notices to be Published

This field is only available when the "Valuation Module in Use" is set to Rates and the "Valuation Tape Legislation" is set to New Zealand. When set on this field controls the selection of Values for display on the Assessment Summary form and also for selection for the generation of Rateable Values.

Valuer General Valuation Update Parameters – Record Objections

This field is only available when the "Valuation Module in Use" is set to Rates and the "Valuation Tape Legislation" is set to New Zealand. When set on this field allows for Objections to be recorded against Valuations.

Valuer General Valuation Update Parameters – Valuer General Number Separator

Enter the character that is used as the VG number separator.

Valuer General Valuation Update Parameters – Roll

This field is only available when the VG Number Structure check box is set on. This field controls the number of digits in the Roll part of the VG Number. Enter a number between 1 and 5.

Valuer General Valuation Update Parameters – Assessment

This field is only available when the VG Number Structure check box is set on. This field controls the number of digits in the Assessment part of the VG Number. Enter a number between 1 and 11.

Valuer General Valuation Update Parameters – Suffix

This field is only available when the VG Number Structure check box is set on. This field controls the number of digits in the Suffix part of the VG Number. Enter a number of either 1 or 2.

Valuer General Valuation Update Parameters – Remove Leading Zeros from Insert Number / Insert Leading Zeros to Major Walk the Road Number

This check box is only available when the Valuation Tape Legislation is set to Queensland. The label changes depending on the Match Valuer General Number with setting. If set to Property ID this check is labelled Remove Leading Zeros from Insert Number. Check it on to remove leading zeros from the VG number held in the VG file.

If the Match Valuer General Number with setting is Major Walk the Road Numbers this check is labelled Insert Leading Zeros to Major Walk the Road Number. Check it on if leading zeros are to be added to the Major Walk the Road Number held in the VG file.

Valuer General Valuation Update Parameters – Remove Trailing Zeros from Insert Number / Insert Leading Zeros to Minor Walk the Road Number

This check box is only available when the Valuation Tape Legislation is set to Queensland. The label changes depending on the Match Valuer General Number with setting. If set to Property ID this check is labelled Remove Trailing Zeros from Insert Number. Check it on to remove trailing zeros from the VG number held in the VG file.

If the Match Valuer General Number with setting is Major Walk the Road Numbers this check is labelled Insert Leading Zeros to Minor Walk the Road Number. Check it on if leading zeros are to be added to the Minor Walk the Road Number held in the VG file.

Rental Parameters - Water Rate In The \$

This field contains the Rate in the \$ that will apply to Valuations for Water.

Land Tax Parameters - Value To \$

This field contains a "valuation to" that will be used to calculate Land Tax.

Land Tax Parameters - Rate Per \$100

This field contains the amount charged per \$100 for this range of valuations.

Averaging of Values Parameter Maintenance

This form enables the entry of parameters required for averaging of Valuations.

Year	Effective Date	Valuation Type	Description
1999 >>	01-Jul-1999	AAV >>	Annual Assessed Value
1998 >>	01-Jul-1998	AAV >>	Annual Assessed Value
1997 >>	10-Apr-1998	AAV >>	Annual Assessed Value

*Averaging of Values Parameter Maintenance***Averaging Factor**

This field is mandatory and is calculated manually as follows:

$$\text{Averaging Factor} = T/nV$$

T = the total of the effective values of all rateable land in the council area for the current and previous financial year(s) covered by the averaging period

n = the averaging period, either 2 or 3 years

V = the effective value of all rateable land in the council area for the financial year.

The value entered will be rounded to 2 decimal places.

Averaging Period

Selected from a pick list. Options are "2 years" and "3 years". The number of rows displayed under the heading "Valuation Types to be Averaged" (2 or 3) is determined by this value.

Averaged Value Valuation Type

When the Average Value is calculated it will be recorded against the Valuation. The Valuation type entered in this field will be used as the Valuation Type for this record. The value can be selected from a pop up form.

Valuation Types to be Averaged – Year

Select from the Pop Up the current Valuation Year on the top row and either the previous year or two years below it, depending on the 'Averaging period' selected.

Note: - It is important that the current Valuation Year is selected on the first line so that the Averaging Calculation correctly calculates the Average Valuation.

Valuation Types to be Averaged – Effective Date

This is an optional field. By default, the most recent valuation for the specified Valuation Year will be used. If a date is entered here this default is not used, and only a valuation with this date of effect will be used for this Valuation Year.

Valuation Types to be Averaged – Valuation Type

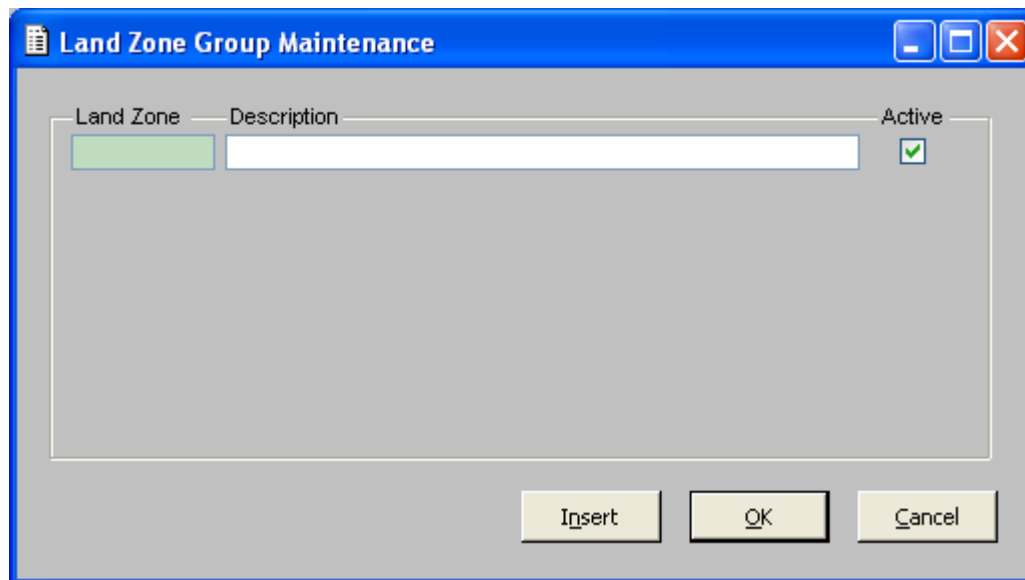
This mandatory field is used to specify the Valuation type that will be used in the calculation of the average Valuation. The value can be selected from a pop up form.

Valuation Types to be Averaged – Description

This field displays the description of the Valuation type that will be used in the calculation of the average Valuation.

Land Zone Group Maintenance Form

This form is only available when the authorised function "Valuations, NZ VSP Load" is set on. This form allows a list of valid Land Zone Group codes to be entered. These will be used to validate the Land Zone Group code supplied or imported into the Mass Appraisal Data table by the VG Update. These codes will also be used when performing on-line Maintenance of the Mass Appraisal Data.



The 'Land Zone Group Maintenance' form features a table with three columns: 'Land Zone', 'Description', and 'Active'. The 'Land Zone' column contains a green box, 'Description' is an empty text field, and 'Active' has a checked checkbox. Below the table are 'Insert', 'OK', and 'Cancel' buttons.

Land Zone	Description	Active
		<input checked="" type="checkbox"/>

Land Zone Group Maintenance form

Land Zone

Enter the Land Zone Code to be validated against imported Mass Appraisal Data. These codes will also be used in the on-line maintenance of the Mass Appraisal Data.

Description

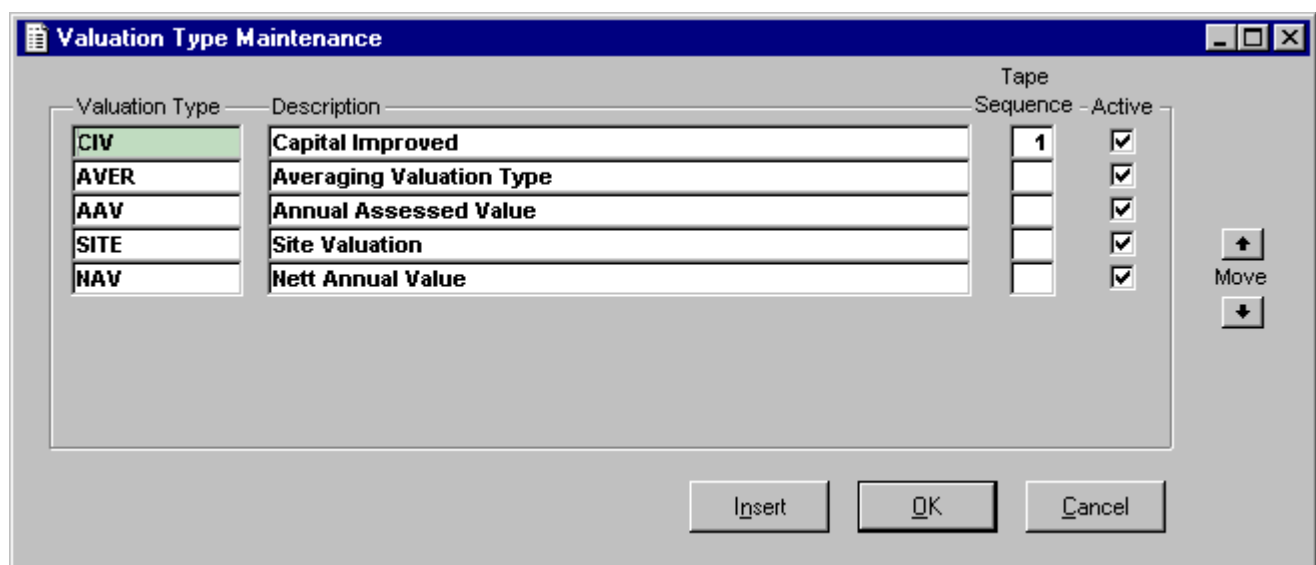
Enter a description associated with the Land Zone Group Code.

Active

If this checkbox is checked on, the Valuation Year may be selected during maintenance functions.

Valuation Type Maintenance Form

This form enables the addition of Valuation Types or the maintenance of existing ones.



The 'Valuation Type Maintenance' form displays a table with columns: 'Valuation Type', 'Description', 'Tape Sequence', and 'Active'. The 'Valuation Type' column lists codes (CIV, AVER, AAV, SITE, NAV), 'Description' lists corresponding terms, 'Tape Sequence' shows values (1, empty, empty, empty, empty), and 'Active' shows checked checkboxes. To the right of the table is a 'Move' button with up and down arrows. At the bottom are 'Insert', 'OK', and 'Cancel' buttons.

Valuation Type	Description	Tape Sequence	Active
CIV	Capital Improved	1	<input checked="" type="checkbox"/>
AVER	Averaging Valuation Type		<input checked="" type="checkbox"/>
AAV	Annual Assessed Value		<input checked="" type="checkbox"/>
SITE	Site Valuation		<input checked="" type="checkbox"/>
NAV	Nett Annual Value		<input checked="" type="checkbox"/>

Valuation Type Maintenance Form

Valuation Type

This field contains a ten-character code representing the Valuation Type

Description

This field contains a fifty character Description to more fully describe the Valuation Type

Tape Sequence

If more than one Valuation Type is imported from the VG Department, enter the sequence number that it is provided.

Active

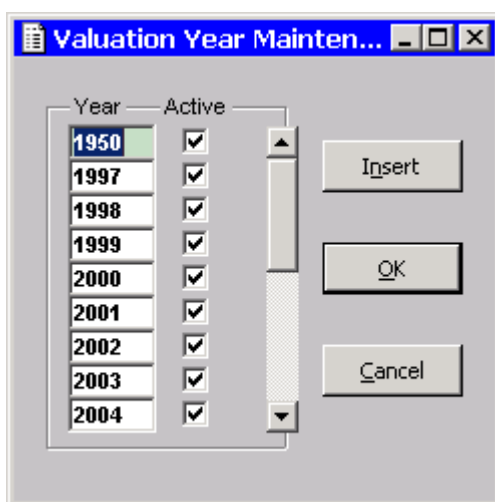
If this checkbox is checked on, the Valuation Type may be selected during maintenance functions

Move Buttons

Select on the appropriate arrow to move the highlighted Valuation Type up a position or down a position in the list

Valuation Year Maintenance Form

This form enables the addition of Valuation Years or the maintenance of existing ones. Valuation Years are the year in which the Valuation was carried out.



Year	Active
1950	<input checked="" type="checkbox"/>
1997	<input checked="" type="checkbox"/>
1998	<input checked="" type="checkbox"/>
1999	<input checked="" type="checkbox"/>
2000	<input checked="" type="checkbox"/>
2001	<input checked="" type="checkbox"/>
2002	<input checked="" type="checkbox"/>
2003	<input checked="" type="checkbox"/>
2004	<input checked="" type="checkbox"/>

Valuation Year Maintenance Form

Year

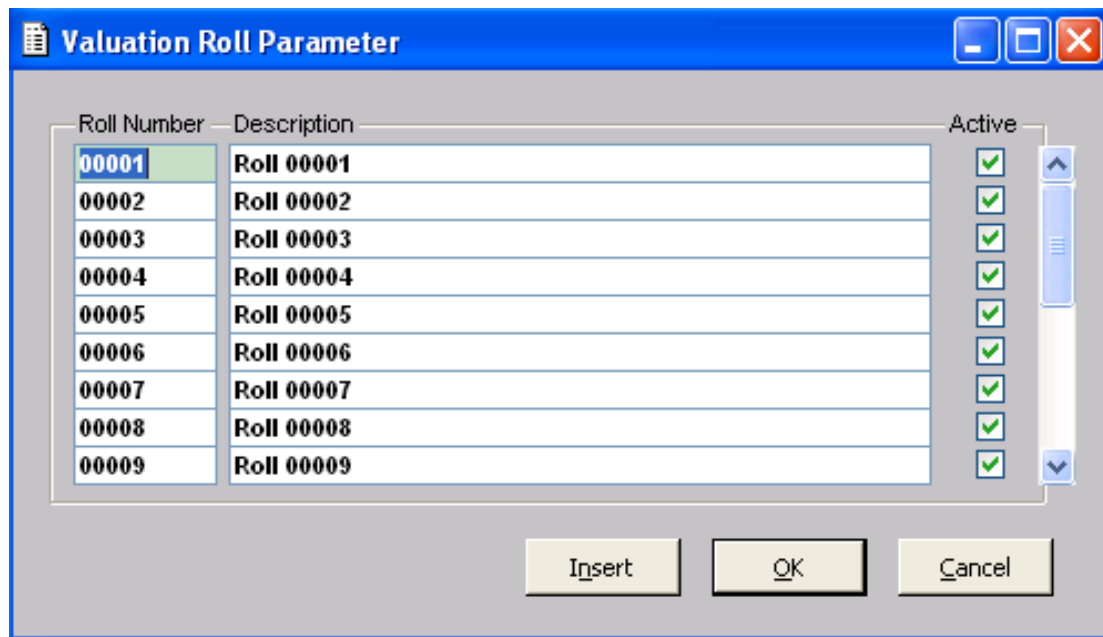
This field contains a year in which the Valuation was carried out by either the Valuer General or by in-house or contract Valuers.

Active

If this checkbox is checked on, the Valuation Year may be selected during maintenance functions.

Valuation Roll Parameter Form

This form is only available when the authorised function "Valuations, NZ VSP Load" is set on. This form allows a list of valid Valuation Roll Numbers to be used for validation purposes when the new 'VG Number Structure Required' parameter is checked on.



The screenshot shows the 'Valuation Roll Parameter' window. It contains a table with columns 'Roll Number', 'Description', and 'Active'. The 'Roll Number' column has values from 00001 to 00009. The 'Description' column has values from 'Roll 00001' to 'Roll 00009'. The 'Active' column has checkboxes, all of which are checked. Below the table are buttons for 'Insert', 'OK', and 'Cancel'.

Roll Number	Description	Active
00001	Roll 00001	<input checked="" type="checkbox"/>
00002	Roll 00002	<input checked="" type="checkbox"/>
00003	Roll 00003	<input checked="" type="checkbox"/>
00004	Roll 00004	<input checked="" type="checkbox"/>
00005	Roll 00005	<input checked="" type="checkbox"/>
00006	Roll 00006	<input checked="" type="checkbox"/>
00007	Roll 00007	<input checked="" type="checkbox"/>
00008	Roll 00008	<input checked="" type="checkbox"/>
00009	Roll 00009	<input checked="" type="checkbox"/>

Valuation Roll Parameter form

Roll Number

The Roll Number is to be entered with the correct number of digits to match the VG Roll Field Size parameter. Zeros must be entered at the start of the Roll number to achieve the required number of digits. If the incorrect number of digits is entered then an error message will be displayed.

Description

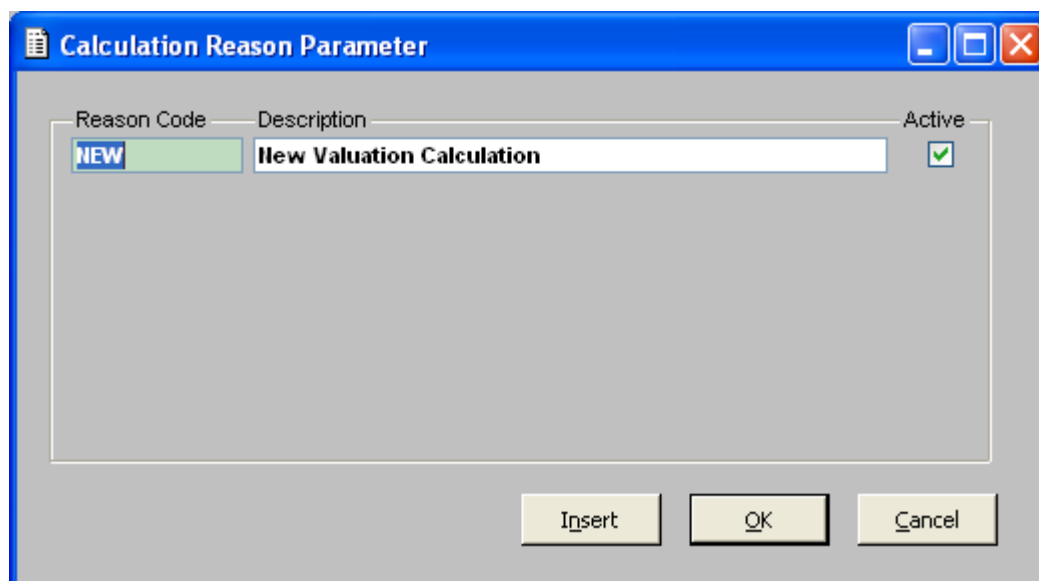
Enter a description of the Roll Number.

Active

If this checkbox is checked on, the Valuation Year may be selected during maintenance functions.

Calculation Reason Parameter Form

This form is only available when the authorised function "Valuations, NZ VSP Load" is set on. This form allows a list of Calculation Reasons to be used by the Council's Valuation Service Provider (VSP). It will also allow on-line Maintenance of the new Calculation Reason to be added to the Valuation Maintenance form.



The screenshot shows the 'Calculation Reason Parameter' window. It contains a table with columns 'Reason Code', 'Description', and 'Active'. The 'Reason Code' column has the value 'NEW'. The 'Description' column has the value 'New Valuation Calculation'. The 'Active' column has a checked checkbox. Below the table are buttons for 'Insert', 'OK', and 'Cancel'.

Reason Code	Description	Active
NEW	New Valuation Calculation	<input checked="" type="checkbox"/>

Calculation Reason Parameter form

Reason Code

Enter a Calculation Reason Code to be used against Valuations.

Description

Enter a description for the Reason Code.

Active

If this checkbox is checked on, the Valuation Year may be selected during maintenance functions.

Maintenance

The following topic is covered in this chapter:

[Valuation Maintenance](#)

[Rental Analysis Maintenance](#)

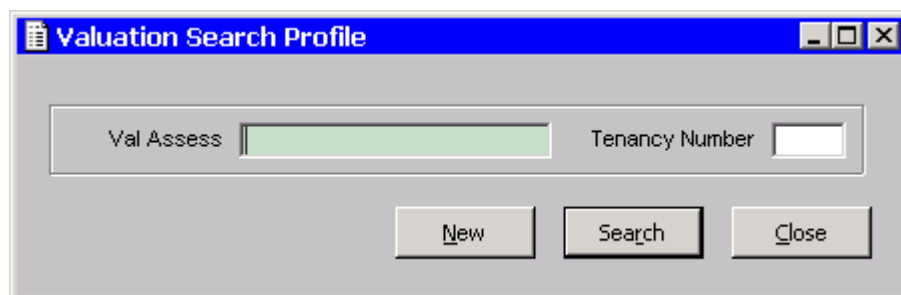
[Rental Assessment](#)

Valuation Maintenance

Valuation Search Profile Form

This form enables you to enter a new Valuer General and a related Tenancy Number or search for an existing one to maintain.

The Valuer General Number is used to store Valuations and related data against



The screenshot shows a window titled "Valuation Search Profile". It contains two input fields: "Val Assess" (a green text box) and "Tenancy Number" (a white text box). Below these fields are three buttons: "New", "Search", and "Close".

Valuation Search Profile Form

Valuer General Number

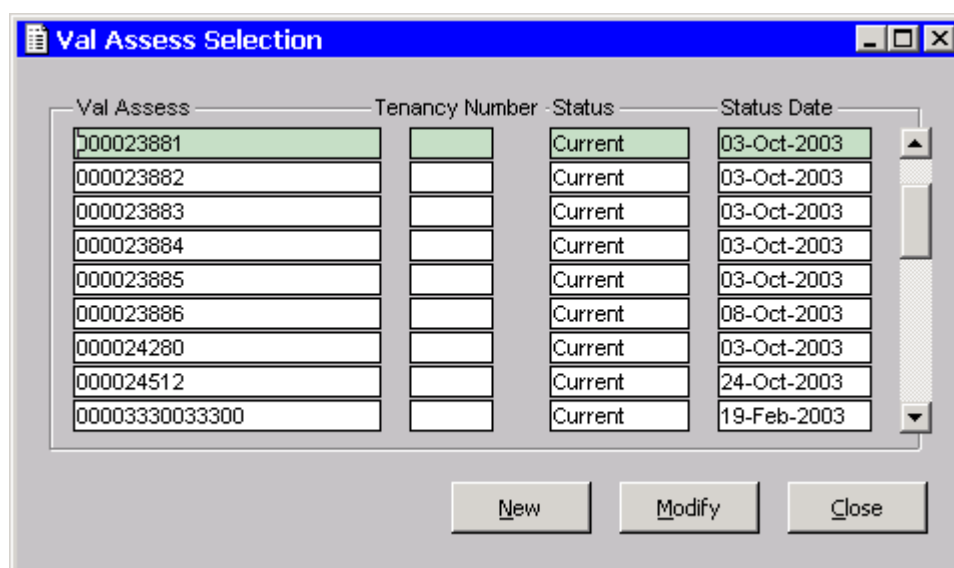
This field contains a ten character Valuer General Number as provided by the Valuer General

Tenancy Number

This field contains a four digit Valuer General Tenancy Number that is used to individually distinguish a strata unit related to the Valuer General number

Valuer General Number Selection Form

This form enables the option to enter a new Valuer General Number and associated Valuation details or the selection of a Valuer General Number you wish to maintain Valuation details for.



The screenshot shows a window titled "Val Assess Selection". It contains a table with four columns: "Val Assess", "Tenancy Number", "Status", and "Status Date". The table has 10 rows of data. Below the table are three buttons: "New", "Modify", and "Close".

Val Assess	Tenancy Number	Status	Status Date
000023881		Current	03-Oct-2003
000023882		Current	03-Oct-2003
000023883		Current	03-Oct-2003
000023884		Current	03-Oct-2003
000023885		Current	03-Oct-2003
000023886		Current	08-Oct-2003
000024280		Current	03-Oct-2003
000024512		Current	24-Oct-2003
00003330033300		Current	19-Feb-2003

Valuer General Number Selection Form

Valuer General Number

This field contains a ten character Valuer General Number as provided by the Valuer General. This field is not maintainable on this form.

Tenancy Number

This field contains a four digit Valuer General Tenancy Number that is used to individually distinguish a strata unit related to the Valuer General number. This field is not maintainable on this form.

Status

This field contains the status of the Valuer General Number. (Current, Proposed, Historic). This field is not maintainable on this form.

Status Date

This field contains the date that the status of the Valuer General Number was declared. This field is not maintainable on this form.

Valuer General Number Maintenance Form

This form enables the addition of a Valuer General number & Tenancy number (if applicable) to associate Valuation details to.

Valuer General Number Maintenance Form

Valuer General Number

This field contains a ten character Valuer General Number as provided by the Valuer General

Tenancy Number

This field contains a four digit Valuer General Tenancy Number that is used to individually distinguish a strata unit related to the Valuer General number

Roll/Assess/Suffix

The Roll, Assessment and Suffix fields are only displayed when the VG Number Structure parameter is set on. The Roll can be entered or selected from the pop up. The Assessment field will need to have details entered with the correct number of digits, entering leading zeros if required. The Suffix will be displayed as it is entered but is not mandatory. The details entered in conjunction with the Valuer General Number Separator (if one is entered) will form the Valuer General Number and populate the Valuer General Number field.

Example:

Assume that the following parameters are set on the Valuation System Parameter Maintenance form:

VG Roll field size:	3
VG Assessment field size:	5
VG Suffix field size:	2
VG Number Separator:	-

Assume that the following entries are made on the VG Number Maintenance form:

Valn Roll:	221
Valn Assessment:	04050
Valn Suffix:	12

The VG Number will be displayed as “221-04050-12”. Where a “Valn Suffix” is not entered, the second separator is not included in the VG Number.

Status

Select the appropriate checkbox to indicate the status of the Valuer Number. Available options are:

- Proposed
- Current
- Historic

Status Date

This field contains the Date that the status is to take effect from.

Pressing F2 or double clicking on this field will display a calendar that can be used to choose the required date from

Valuation Maintenance Form

This form enables the maintenance of valuation records for a particular Valuer General number. When the “VG Number Structure Required” parameter is checked on in System Parameter Maintenance, Roll, Assessment and Suffix fields are made available on the Valuation Maintenance form and the VG Number field is made display only.

If System Parameter ‘Valuation Notices to be Published’ is set on, the “DVR Status” field is displayed.

Year	Effective Date	Correction	Apply Avg. Factor	Description	Value
2006 >>	01-Jul-2006	0	<input type="checkbox"/>		
2005 >>	01-Jul-2005	0	<input type="checkbox"/>		
2004 >>	30-Jun-2003	0	<input type="checkbox"/>	testing smart client	
2003 >>	01-Jul-2003	0	<input type="checkbox"/>		
2000 >>	01-Jul-2001	0	<input type="checkbox"/>		
1999 >>	01-Jul-1999	0	<input type="checkbox"/>		
1998 >>	01-Jul-1998	0	<input type="checkbox"/>		

Valuation Type	Description	Value
AAV	Annual Assessed Value	6,532

Valuation Maintenance Form

Valuation Maintenance Form (with VG Number Structure parameter is set on)

Valuer General Number

This field contains a ten character Valuer General Number as provided by the Valuer General

Tenancy Number

This field contains a four digit Valuer General Tenancy Number that is used to individually distinguish a strata unit related to the Valuer General number

Roll/Assess/Suffix

The Roll, Assessment and Suffix fields are only displayed when the VG Number Structure parameter is set on. The Roll can be entered or selected from the pop up. The Assessment field will need to have details entered with the correct number of digits, entering leading zeros if required. The Suffix will be displayed as it is entered but is not mandatory. The details entered in conjunction with the Valuer General Number Separator (if one is entered) will form the Valuer General Number and populate the Valuer General Number field.

Status

Select the appropriate checkbox to indicate the status of the Valuer Number. Available options are:

- Proposed
- Current
- Historic

Status Date

This field contains the Date that the status is to take effect from.

Pressing F2 or double clicking on this field will display a calendar that can be used to choose the required date from

Valuation Year

This field contains the year that the valuation was carried out

Valuation Year Pop Up Button

Select on the Valuation Year Pop Up button to select a Valuation Year. (These Valuation Years must previously have been set up in "Valuation Years Maintenance")

Effective Date

This field contains the Date that the Valuation is to take effect from.

Pressing F2 or double clicking on this field will display a calendar that can be used to choose the required date from

Correction

This field contains the Valuer General Correction Number that is used to designate the order in which changes occurred to Valuations within the one Valuation Year. Select on the up arrow to increment or Select on the down arrow to decrement the number.

Description

Enter a Valuation Description. The Valuation Description can be displayed on the Rates Assessment Summary form and, if selected, will display the Description for the most recent Valuation for the current Valuation Year.

DVR Status

This field is only displayed when the 'Valuation Notices to be Published' parameter is set on. Valid values are:

- Accepted
- Rejected
- Published
- Adopted

If a new valuation is added on this form, the DVR Status is to be defaulted to Accepted. Users can set this field to any of the valid values above.

The DVR Status will be used by the following forms and processes:

VG Number Update:	Will set new Valuation Correction records to Accepted.
Valuation Maintenance:	Users may manually change the DVR Status to Rejected if the Valuation Correction record is not to be used.
Valuation Notice:	This new process will only select for printing notices Valuation Corrections with a DVR Status of 'Accepted'. Successful processing of the Valuation Notice will update the DVR Status to 'Published'.
Assessment Summary:	When the new 'Valuation Notices to be Published' parameter is set on, the latest Valuation with a DVR Status of either 'Published' or 'Adopted' will be displayed.
Rateable Valuation Generation:	When the new 'Valuation Notices to be Published' parameter is set on, the latest Valuation with a DVR Status of either 'Published' or 'Adopted' will be used to create a Rateable Valuation.

Value Detail Button

Select on the detail button to carry out Values Maintenance.

Valuation Type

This field contains the Valuation Type selected for the Valuation.

Description

This field contains the description of the selected Valuation Type.

Value

This field contains the Valuation entered against the selected Valuation Type.

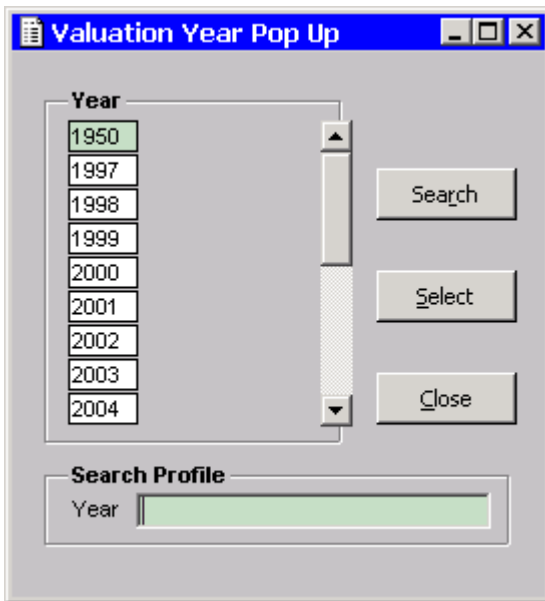
Adjusted Value

This field contains the adjusted value entered against the Valuation Type. Adjusted values are used to denote that a Postponed Value exists or simply to denote any other adjusted value exists for whatever reason.

If an Adjusted Valuation is present, then the Adjusted Valuation amount will be used in the Rates calculation process rather than the valuation amount.

Valuation Year Pop Up Form

This form enables the selection of a Valuation Year.

The image shows a software window titled "Valuation Year Pop Up". It features a list box on the left labeled "Year" containing the years 1950, 1997, 1998, 1999, 2000, 2001, 2002, 2003, and 2004. To the right of the list box are three buttons: "Search", "Select", and "Close". Below the list box is a section labeled "Search Profile" which contains a text input field with the label "Year" and a green background.

Valuation Year Pop Up Form

Year

This field contains the year that the valuation was carried out

Search Profile - Year

Enter a year and Select Search to search for a specific year to select.

Values Maintenance Form

This form enables the entry or maintenance of Valuation Types and the relative values associated with those Types. This form is not available to maintain valuation details when the Valuations System Parameter Valuation Module in Use is set to New Zealand and the Amend Valuations check box is off. When the System Parameter 'Valuation Notices to be Published' is set on, the Calculation Date, Reason Code, Import Date and Remarks fields are displayed. Also, when the System Parameter 'Record Objections' is set on, the Objections button is made available.

Values Maintenance

VG # 12345/98765/43 Tenancy Number Calculation Date
 Year 2007 Effective Date 01-Jul-2007 Reason Code
 Correction Number 0 Notice Date Import Date
 Remarks

Valuations

Valuation Type	Description	Value	Adjusted Value

Objections Tenancy Rateable Valuation Insert Continue Quit

Values Maintenance Form

Valuer General Number

This field contains a ten character Valuer General Number that you are maintaining values and other details for

Tenancy Number

This field contains a four digit Valuer General Tenancy Number that is used to individually distinguish a strata unit related to the Valuer General number

Calculation Date

This field will be displayed when the 'Valuation Notices to be Published' parameter is set on. Enter the date that the Calculation occurred on. This field is set to the Calculation Date in the uploaded file when a valuation is imported through the VG Number Update process. If the Calculation Date is not supplied in the upload file then this field is left blank.

Valuation Year

This field contains the year that the valuation was carried out

Effective Date

This field contains the Date that the Valuation is to take effect from.

Reason Code

The Calculation Reason field will be displayed when the 'Valuation Notices to be Published' parameter is set on. Either enter or select from the Pop Up a reason for the Valuation. This field is set to the Reason Code in the uploaded file when a valuation is imported through the VG Number Update process. If the Reason Code is not supplied in the upload file then this field is left blank. The imported Calculation Reason must match one of the Calculation Reason parameters or an exception will be issued.

Correction Number

This field contains the Valuer General Correction Number that is used to designate the order in which changes occurred to Valuations within the one Valuation Year.

Notice Date

This field will be displayed when the 'Valuation Notices to be Published' parameter is set on. It will be non-maintainable and will indicate when a Valuation Notice has been issued.

Import Date

This field will only be displayed when the 'Valuation Notices to be Published' parameter is set on. This date is set to the date that the Valuation was imported.

Remarks

This field will be displayed when the 'Valuation Notices to be Published' parameter is set on. Up to 100 characters of free format text, relating to the valuation can be entered. This field is set to the Calculation Remarks in the uploaded file when a valuation is imported through the VG Number Update process. If Calculation Remarks are not supplied in the upload file then this field is left blank.

Valuation Type

This field contains the Valuation Type selected for the Valuation

Valuation Type Pop Up Button

Select on the Valuation Type Pop Up button to select a Valuation Type. (These Valuation Types must previously have been set up in "Valuation Type Maintenance")

Description

This field contains the description of the selected Valuation Type. When the Valuation Tape Legislation is set to New Zealand, this field is populated with the Improvements in the uploaded file when a valuation is imported through the VG Number Update process.

Value

This field contains the Valuation entered against the selected Valuation Type

Adjusted

This field contains the adjusted value entered against the Valuation Type. Adjusted values are used to denote that a Postponed Value exists or simply to denote any other adjusted value exists for whatever reason.

If an Adjusted Valuation is present, then the Adjusted Valuation amount will be used in the Rates calculation process rather than the Valuation amount.

Rateable Valuation Button

Select on this button to proceed to Rateable Valuation Request Maintenance.

Objections Button

The Objections button will only be displayed when the 'Record Objections' parameter is set on. Press the Objections button to navigate to the Objection Maintenance form to enter the details of an Objection. The button label will display as **bold** when objection details exist.

Rateable Valuation Request Maintenance Form

This form enables the Rateable Valuation for a property to be calculated, taking into consideration Adjusted Values & Tenancy percentages.

Rateable Valuation Request Maintenance

VG # Tenancy Number

Year Effective Date Correction Number

Rateable Valuation Requests

Year	Effective Date	Correction	Total Entitlement	Assessments	Rateable Valuations
2006	01-Jul-2006	1			

Generate Insert OK Cancel

Rateable Valuation Request Maintenance Form

Valuer General Number

This field contains a ten character Valuer General Number that you are maintaining values and other details for. This field is not maintainable from this form.

Tenancy Number

This field contains a four digit Valuer General Tenancy Number that is used to individually distinguish a strata unit related to the Valuer General number. This field is not maintainable from this form.

Valuation Year

This field contains the year that the valuation was carried out. This field is not maintainable from this form.

Effective Date

This field contains the Date that the Valuation is to take effect from. This field is not maintainable from this form.

Correction Number

This field contains the Valuer General Correction Number that is used to designate the order in which changes occurred to Valuations within the one Valuation Year. This field is not maintainable from this form.

Rateable Values Year

This field contains the Year that you are creating the Rateable Value for.

Effective Date

This field contains the Date that the Rateable Valuation is to take effect from. Pressing F2 or double clicking on this field will display a calendar that can be used to choose the required date from.

Correction Number

This field contains the Valuer General Correction Number that is used to designate the order in which changes occurred to Valuations within the one Valuation Year. This field is only maintainable for new Rateable Valuation Requests.

Total Entitlement

If Unit Entitlements are in use enter the Total Entitlement that is to be used to determine the share of the Valuation.

Assessment Detail Button

Select on the Assessment detail button to enable the entering of Percentage Proportions for the Assessment

Rateable Valuations Detail Button

Select on the Rateable Valuations detail button to enable the entering of Percentage Proportions for the Assessment

Generate Button

Select on the Generate button to generate the Rateable Value for the Assessment. When the 'Valuation Notices to be Published' parameter is set on, the Generate button will only be available for Valuations with a "DVR Status" of 'Published' or 'Adopted'.

Percentage Proportion Maintenance Form

This form enables the maintenance of Rateable Valuation percentages for assessments with the same Valuer General Number

Assessments		
Assessment Number	Primary Location	Percentage
27123 8	"Section House", 1/3 Section Street, Daw Park SA 5098	100.00000000

Running Total: 100.00000000

Continue Quit

Percentage Proportion Maintenance Form

Year

This field contains the Year that you are creating the Rateable Value for. This field is not maintainable from this form.

Effective Date

This field contains the Date that the Rateable Valuation is to take effect from. This field is not maintainable from this form.

Correction Number

This field contains the Valuer General Correction Number that is used to designate the order in which changes occurred to Valuations within the one Valuation Year. This field cannot be maintained from this form.

Assessment Number

This field contains the Assessment Number and check digit attached to the Valuer General Number that you are maintaining the percentages for.

Primary Location

This field contains the primary property address that you are maintaining the percentages for. This field cannot be maintained from this form.

Entitlement

Enter the Entitlement share of the assessment. This will then be used to calculate the Percentage figure as part of the Total Entitlement.

Percentage

This field contains the percentage of the Valuation that applies to this Assessment. If there is only one Assessment linked to this Valuer General Number then the percentage will be 100%. If there are multiple Assessments linked to this Valuer General Number, then the percentages assigned to each of those Assessments must in Total add up to 100%.

Entitlement - Running Total

As Entitlement figures are entered against assessments this field is updated with a cumulative total of the Entitlements.

Percentage - Running Total

As Percentage figures are entered against assessments this field is updated with a cumulative total of the Percentages.

Total Entitlement

This is the Total Entitlement figure entered on the Rateable Valuation Request Maintenance from.

Calculate Button

This button is only available when the Entitlement Running Total exactly equals the Total Entitlement figure. When pressed it will populate the Percentage figures.

Rateable Valuations Request Enquiry Form

This form enables an enquiry on Rateable Valuations for an assessment to be made.

Assessment Number	Primary Location	Rateable Valuation Type	Rateable Value	
27123	8	"Section House", 1/3 Section Street, Daw Park SA	CIV	122,000
			UCV	0
			BVV	122,000

Rateable Valuations Request Enquiry Form

Valuer General Number

This field contains a ten character Valuer General Number that you are maintaining values and other details for. This field is not maintainable from this form.

Tenancy Number

This field contains a four digit Valuer General Tenancy Number that is used to individually distinguish a strata unit related to the Valuer General number. This field is not maintainable from this form.

Valuation Year

This field contains the year that the rateable Valuation applies to. This field is not maintainable from this form.

Effective Date

This field contains the Date that the Rateable Valuation is to take effect from. This field is not maintainable from this form.

Correction Number

This field contains the Valuer General Correction Number that is used to designate the order in which changes occurred to Valuations within the one Valuation Year. This field is not maintainable from this form.

Assessment Number

This field contains the Assessment Number and check digit attached to the Valuer General Number that you are maintaining.

Primary Location

This field contains the primary property address that you are maintaining. This field cannot be maintained from this form.

Rateable Valuation Type

This field contains the Rateable Valuation Type attached to this assessment.

Rateable Value

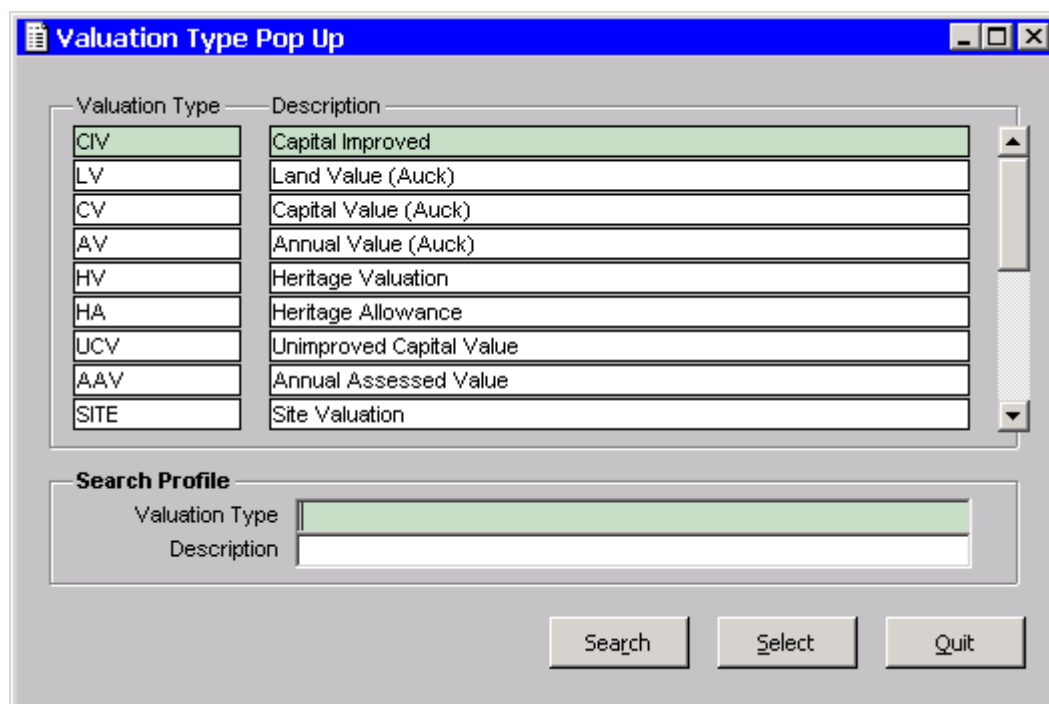
This field contains the Rateable Value attached to the Rateable Value Type for this assessment.

Adjusted Value

This field contains the Rateable Value attached to the Rateable Value Type for this assessment.

Valuation Type Pop Up Form

This form enables the selection of Valuation Types to include in the Rateable Value Formula



The image shows a software window titled "Valuation Type Pop Up". It contains a table with two columns: "Valuation Type" and "Description". The table lists ten valuation types. Below the table is a "Search Profile" section with two input fields: "Valuation Type" and "Description". At the bottom right are three buttons: "Search", "Select", and "Quit".

Valuation Type	Description
CIV	Capital Improved
LV	Land Value (Auck)
CV	Capital Value (Auck)
AV	Annual Value (Auck)
HV	Heritage Valuation
HA	Heritage Allowance
UCV	Unimproved Capital Value
AAV	Annual Assessed Value
SITE	Site Valuation

Search Profile

Valuation Type

Description

Search Select Quit

Valuation Type Pop Up Form

Valuation Type

This field contains a Valuation Code that can be selected to include in the Rateable Value Formula

Description

This field contains a description that further describes the Valuation Type

Search Profile - Valuation Type

Enter a Valuation Code that can be used to search for the appropriate code to select to include in the Rateable Value Formula.

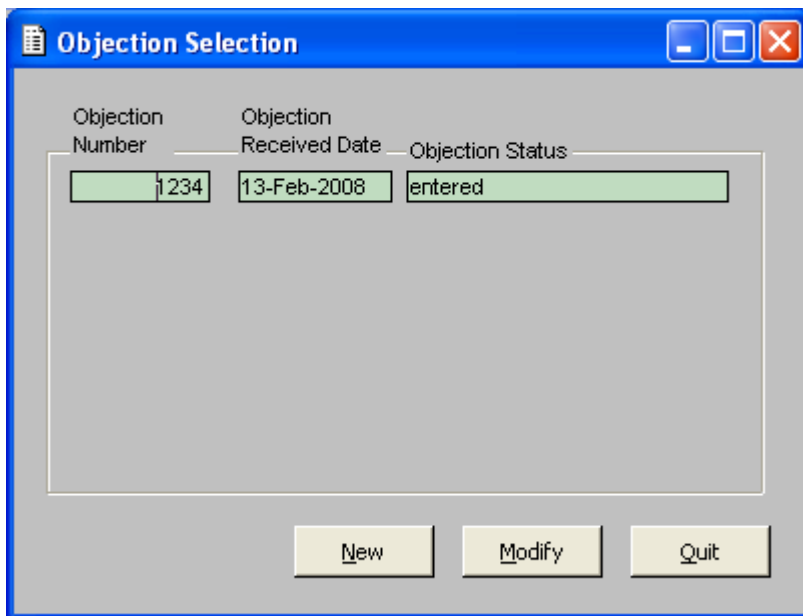
Search Profile - Description

To search for a particular Valuation Type Description, enter the Valuation Type Transaction Type Description and Select search.

If only part of the description is known, then a wildcard search can be made for all existing Valuation Type Descriptions in the System containing a particular word. (E.g., *Land* will return all Valuation Types with a description which contains the word "Land" such as Land Value, Unimproved Land Value etc).

Objections Selection Form

This form is only available when the 'Record Objections' parameter is set on. It will be displayed when more than one Objection exists for a Valuation. It is used to select the required Objection for viewing or maintenance. Objections are displayed in descending Objection Number Order.

A screenshot of a Windows-style dialog box titled "Objection Selection". The dialog has a blue title bar with standard minimize, maximize, and close buttons. Inside, there are three input fields: "Objection Number" containing "1234", "Objection Received Date" containing "13-Feb-2008", and "Objection Status" containing "entered". Below these fields is a large empty rectangular area. At the bottom of the dialog are three buttons: "New", "Modify", and "Quit".

Objection Number	Objection Received Date	Objection Status
1234	13-Feb-2008	entered

Objection Maintenance form

Objection Number

This field displays the Objection Number.

Objection Received Date

This field displays the Objection Received date.

Objection Status

This field displays the Objection Status.

Objections Form

This form is only available when the 'Record Objections' parameter is set on. It enables the entry of a new or maintenance of an existing Objection to the valuation.

Objection Maintenance form

Objection Number

This mandatory field holds the unique Objection Number as allocated by council.

Objection Status

This mandatory field holds the Objection Status. This is a 20 character free format field.

Reason

This optional field holds the Reason for the objection. This is a 250 character free format field.

Objectors Name and Address

This mandatory field holds the Objectors Name and Address. This is a 250 character free format field.

Capacity of Objector

This mandatory field holds the Capacity of Objector. This is a 250 character free format field.

Objector Contact Phone

This mandatory field holds the Objector Contact Phone.

Objector Contact E-mail

This optional field holds the e-mail address of the objector.

Objected LV

This field displays the Land Value and is not maintainable.

Objected CV

This field displays the Capital Value and is not maintainable.

Contended LV

This optional field holds the contended Land Value.

Contended CV

This optional field holds the contended Capital Value.

Offered LV

This optional field holds the offered Land Value.

Offered CV

This optional field holds the offered Capital Value.

Finalised LV

This optional field holds the finalised Land Value.

Finalised CV

This optional field holds the finalised Capital Value.

Objection Received Date

This mandatory field holds the date that the objection was received. This date can not be a future date.

Reply Letter Date

This optional field holds the date that a reply letter was issued. This date must be later than the Objection Received Date.

Inspection Date

This optional field holds the date that an inspection was performed.

Offer Letter Date

This optional field holds the date that a letter of offer was issued. This date must be the same as, or later than, the Reply Letter Date.

Offer Expiry Date

This optional field holds the date that the offer will expire.

Withdrawn Date

This optional field holds the date the objection was withdrawn.

Tribunal Date

This optional field holds the date that the objection went to tribunal. This date must be later than the Offer Letter date.

Hearing Date

This optional field holds the date that the objection was heard.

Completed Date

This optional field holds the date that the objection was completed.

Certified Date

This optional field holds the objection was certified.

Certifier Name

This optional field holds the name of the certifier.

Comments

This optional field holds any comments about the objection. This is a 250 character free format field.

Rental Analysis Maintenance

Rental Analysis Maintenance Form

This screen is the first of three screens that allow maintenance of a Rental Record for a given Assessment and Rating Period.

The Rental Record is split into two functional parts: the Rental Analysis part and the Rental Assessment part.

Only one Rental Record for each Assessment and Rating Period can exist.

A Rental Record is termed 'Proposed' if it is for the Next Rating Period: in this case all fields on the Rental Record are maintainable. A record for the Current Rating Period is termed 'Current': it is this record that has determined the current Valuation. All other records for past Rating Periods are termed 'Historic'.

Note that Current and Historic records are not maintainable through the Rental Analysis screen. The Rental Assessment screen will allow maintenance of one field for these records, but other than this, these records are for information purposes only.

The user can toggle between records for different Rating Periods (provided that they exist) by means of the Rating Period field in the standard header section.

Note that records can be deleted from the first screen only, and that the first screen holds all of the calculations, whereas the second screen holds fields used for information.

Rental Analysis Maintenance

Primary Location: 163 Bellevue Parade, CARLTON NSW 2218 Current

Trading Name/Occupier: Description:

Assessment Number: 24876 5 Current

Rating Period: 2005/2006 >> 2005/06 Rates Generation

Face Rent

Frequency: **Monthly** Unadjusted Rental: **1,820**

Rent Type: **Gross Rent** Face Rent per Annum: **21,840**

Additional Amounts

Include Rates: ☐

Water Rates Capital Value: Net Rates:

Land Tax Site Value: Water Rates:

Land Tax Rates:

Insurance:

Maintenance Outgoings: Subtotal:

Other Outgoings (+): Rate (\$/m²): Amount:

Other Outgoings (-): Rate (\$/m²): Amount:

Summary

Incentive Adjustments Description: Adjusted Gross Face Rent per Annum: **21,840**

Gross Adjusted Rate (\$/m²): **36.40** Amount:

Statutory Gross Rent per Annum: **21,840**

Gross Rent per Week: **420**

More OK Cancel

*Rental Analysis Maintenance Form***Primary Location**

The Primary Property/Parcel Description and Status. This includes a DETAIL button to drill down into the Property system. This field cannot be overridden.

Location Status

This is the current status of the selected property.

Trading Name

The Trading Name linked to the Property. If no Trading Name exists, then the Occupier. If there are multiple names, these are concatenated by Name and Address application. This field will be blank if no Trading Name or Occupier exist. This field cannot be overridden.

Property Description

The first current primary Land Use description. Cannot be overridden.

Assessment Number

The Assessment Number, Check Digit of the Assessment currently being maintained. Cannot be overridden.

Assessment Status

The Status of the Assessment currently being maintained. Cannot be overridden.

Rating Period

The Rating Period Code and Description pertaining to the Rental Record currently displayed. This includes a POP UP button to select other Rating Periods (not in the future) that Rental Records exist for the Assessment currently being maintained.

When the screen is first displayed, the next Rating Period is defaulted, and an empty record is displayed for creation if one does not already exist for the Assessment and next Rating Period. Selection of a Rating Period other than the next one will result in the associated Rental Record being displayed in enquiry mode.

Rating Period Description

The Rating Period Code Description pertaining to the Rental Record currently displayed.

Face Rent Frequency

The Frequency of the Unadjusted Rental. Refer F Spec for possible values and associated multipliers (e.g.. a Monthly frequency has a multiplier of 12).

Unadjusted Rent

Unadjusted Rental is multiplied by Frequency to give Face Rent per Annum.

Face Rent Type

The Type of Rent paid.

Face Rent Per Annum

Result of (Frequency multiplier x Unadjusted Rental). Can be overridden. Calculated value will be reinstated by altering/changing either component or nullifying field.

Include Rates

Will rates be included in the calculation? If ON, then Net Rates included in Subtotal figure (unless Face Rent Type = 'Gross'). If OFF, the Net Rates not included in Subtotal figure, although the Net Rates figure is still displayed and maintainable.

Net Rates

If rates are included the value of the rates. Defaults to the Net Rates for the Assessment from the Rates system. Can be overridden. Calculated value reinstated by nullifying field.

Water Rates Capital Value

The Capital value used to calculate water rates for this rental record.

Water Rates

The value of the Water Rates Calculation. Result of (Water Rate in the Dollar x Water Rates Capital Value). Water Rate in the Dollar is maintained in the Valuation System Parameters. Can be overridden. Calculated value reinstated by altering either component or nullifying field

Land Tax Capital Value

The Capital value used to calculate Land Tax for this rental record.

Land Tax Value

The value of the Land Tax Calculation. Result of calculation based upon applying Land Tax Parameters to the Land Tax Site Value. Land Tax Parameters are maintained in the Valuation System Parameters. Can be overridden. Altering either component or nullifying field reinstates calculated value. Land Tax Rates are calculated in a similar manner to Income Tax... consider the following example:

Land Tax Site Value =
450,000

Land Tax Parameters:	Value to (\$)	Rate per \$100
	50,000	0.00000000
	300,000	0.35000000
	1,000,000	1.65000000
	999,999,999	3.70000000

First 50,000 calculated at a Rate of 0.00/100 => 0

Next 250,000 (difference between 300,000 and 50,000) calculated at a Rate of 0.35/100 => 875

Next 150,000 (remaining amount) calculated at a Rate of 1.65/100 => 2,475

Total amount = (0 + 875 + 2475) = 3,350

Insurance

Enter the value of insurance to be included in the calculation.

Maintenance Outgoings

Enter the value of maintenance to be included in the calculation.

Subtotal:

This field automatically calculates the 'Net Rates' field from the Assessment's gross rates. This occurs when the 'Include Rates' checkbox is set ON. Only the transactions with types of GENR, GENR-R, EXGR, EXGR-R, POST and POST-R are included. This field cannot be overridden.

The transactions will be accumulated for the first Rating Period containing the 1st day of the month and year held in the Lease Details Start Date Month and Year fields (on the Rental Analysis Additional Maintenance form, accessed by clicking the 'More' button). If these fields are empty, the current Rating Period will be used.

Note that any existing value in the 'Net Rates' field will not be updated - if required this can be achieved by blanking out the 'Net Rates' field which will re-populate the field with the newly calculated value.

Other Outgoings (+) Rate:

Multiplied by Total Assessed Rent Area (Rental Assessment screen) to give Other Outgoings (+) Amount.

Other Outgoings (+) Amt:

Result of (Total Assessed Rent Area x Other Outgoings (+) Rate). Can be overridden and a value entered even if there is no corresponding Rate. Calculated value is reinstated by altering

Other Outgoings (-) Rate:

Multiplied by Total Assessed Rent Area (Rental Assessment screen) to give Other Outgoings (-) Amount.

Other Outgoings (-) Amt:

Result of (Total Assessed Rent Area x Other Outgoings (-) Rate). Can be overridden and a value entered even if there is no corresponding Rate. Calculated value is reinstated by altering

Adjusted Face Rent Per Annum

Sum of the Face Rent per Annum, Subtotal, Other Outgoings (+) and Other Outgoings (-) Amounts. Cannot be overridden.

Incentive Adjustments Description

Free format field to hold a description of the amount held in Incentive Adjustments Amount field.

Incentive Adjustment Amount

An amount to be subtracted from the Adjusted Gross Face Rent per Annum.

Statutory Gross Rent Per Annum

Result of (Adjusted Gross Face Rent per Annum - Incentive Adjustments Amount). Cannot be overridden.

Gross Adjusted Rent

Result of (Statutory Gross Rent per Annum / Total Assessed Rent Equivalent Area (Rental Assessment screen)). Cannot be overridden.

Gross Rent Per Week

Result of (Statutory Gross Rent per Annum / 52). Cannot be overridden.

Rental Analysis Additional Maintenance Form

This form is the second of three forms that allow maintenance of a Rental Record for a given Assessment and Rating Period.

Note that the Rental Record is split into two functional parts: the Rental Analysis and the Rental Assessment. These have been split as a user request since different staff are responsible for the two parts.

A Rental Record is termed 'Proposed' if it is for the next Rating Period: in this case all fields on the Rental Record are maintainable. A record for the Current Rating Period is termed 'Current': it is this record that has determined the current Valuation. All other records for past Rating Periods are termed 'Historic'.

Note that Current and Historic records are not maintainable through the Rental Analysis screen. The Rental Assessment screen will allow maintenance of one field for these records, but other than this, these records are for information purposes only.

The user can toggle between records for different Rating Periods (provided that they exist) by first returning to the first screen and then using the Rating Period fields in the standard header section.

Note that records can be deleted from the first screen only, and that the first screen holds all of the calculations, whereas this second screen holds fields used for information.

All fields are optional unless validation rules force interdependence between fields

Rental Analysis Additional Maintenance

Primary Location: 163 Bellevue Parade, CARLTON NSW 2218 Current

Trading Name/Occupier: Description:

Assessment Number: 24876 5 Current

Rating Period: 2005/2006 2005/06 Rates Generation

Other Outgoings Codes

Other Outgoings (+): Airconditioning
Car Parking
(none)
(none)
(none)

Other Outgoings (-): Cleaning
Security Patrols
(none)
(none)
(none)

Lease Details

Lease Terms: 12 months
Start Date: Month 01 Year 2004
Rights of Renewal:
Lease Notes:

Rent Review - Dates and Types

Month	Year	Type
01	2005	Percentage Increase
		(none)
		(none)
		(none)

Continue Quit

Rental Analysis Additional Maintenance Form

Primary Location

The Primary Property/Parcel Description and Status. This includes a DETAIL button to drill down into the Property system. This field cannot be overridden.

Location Status

This is the current status of the selected property.

Trading Name

The Trading Name linked to the Property. If no Trading Name exists, then the Occupier. If there are multiple names, these are concatenated by Name and Address application. This field will be blank if no Trading Name or Occupier exist. This field cannot be overridden.

Property Description

The first current primary Land Use description. Cannot be overridden.

Assessment Number

The Assessment Number, Check Digit of the Assessment currently being maintained. Cannot be overridden.

Assessment Status

The Status of the Assessment currently being maintained. Cannot be overridden.

Rating Period

The Rating Period Code and Description pertaining to the Rental Record currently displayed. This includes a POP UP button to select other Rating Periods (not in the future) that Rental Records exist for the Assessment currently being maintained.

When the screen is first displayed, the next Rating Period is defaulted, and an empty record is displayed for creation if one does not already exist for the Assessment and next Rating Period. Selection of a Rating Period other than the next one will result in the associated Rental Record being displayed in enquiry mode.

Rating Period Description

The Rating Period Code Description pertaining to the Rental Record currently displayed.

Other Outgoings (+):

Up to five Other Outgoings (+) Codes may be selected. Use the dropdown menu to make a selection from the available values. Valid Codes are

- (none)
- Air conditioning
- Car Parking
- Ground Rent
- Toiletries for Public Area
- Other

A '(none)' Code must not appear before a valid Code and it is only valid to select 'Other' more than once.

If a code is selected on this screen then entry of the Other Outgoings Rate or the Other Outgoings Amount is mandatory.

Other Outgoings (-):

Up to five Other Outgoings (-) Codes may be selected. Use the dropdown menu to make a selection from the available values. Valid Codes are:-

- (none)
- Air conditioning
- Car Parking
- Ground Rent
- Toiletries for Public Area
- Other

A '(none)' Code must not appear before a valid Code and it is only valid to select 'Other' more than once.

If a code is selected on this screen then entry of the Other Outgoings Rate or the Other Outgoings Amount is mandatory.

Lease Terms:

Enter in this field the Lease Period displayed in months for the selected property. Lease Terms is mandatory if Start Date or Rights of Renewal are entered.

Start Date: Month:

The numeric value for the Start Month of the Lease. I.e. 05=May. Both a Start Month and Year must be entered if either is entered.

Start Date mandatory if Lease Terms or Rights of Renewal are entered.

Start Date: Year:

The Start Year of the Lease. Both a Start Month and Year must be entered if either is entered.

Rights of Renewal

The number of years from the first Lease Rights of Renewal. Rights of Renewal must be entered from the left to the right with no gaps.

Lease Notes:

An unlimited comments field.

Rent Review Dates:

The dates of future Rent Reviews.(Month/Year)

Rent Review Types

The type of review required at the selected date. Use the drop down menu to select a valid entry. Valid types are:

- (none)
- CPI
- Market
- Percentage Increase
- Fixed Predetermined Amount
- Percentage of turnover
- Greater of CPI and Market
- Unknown

Review details must be entered from the top down with no gaps and dates must be in ascending order.

Rental Assessment

Rental Assessment Form

This form is the third of three forms that allow maintenance of a Rental Record for a given Assessment and Rating Period.

Note that the Rental Record is split into two functional parts: the Rental Analysis and the Rental Assessment. These have been split as a user request since different staff are responsible for the two parts.

This screen can only be accessed if a record has been created via Rental Analysis for the Assessment. Note that only one Rental Record for each Assessment and Rating Period can exist.

A Rental Record is termed 'Proposed' if it is for the Next Rating Period: in this case all fields on the Rental Record are maintainable. A record for the Current Rating Period is termed 'Current': it is this record that has determined the current Valuation. All other records for past Rating Periods are termed 'Historic'. Note that Historic records are not maintainable through the Rental Assessment screen.


The user can toggle between records for different Rating Periods (provided that they exist) by means of the Rating Period fields in the standard header section. Note that Rental Records cannot be deleted from this form - this must be done from Rental Analysis Maintenance.

The 'Calculate' button will only be available if the Next or Current Rating Period's record is displayed and this is a Primary Rental Record. In this case, pressing the button will validate the form including the 'Included With' fields. In addition to this, it will calculate the Proposed Annual Value and modify each of the Included With records to point to this primary record.

The 'Insert'/'New' button will insert a new Floor or Group occurrence and will only be available if the Next or Current Rating Period's record is displayed.

Most fields are optional unless validation rules force interdependence between fields. All calculations are done interactively and totals etc. are automatically updated.

Rental Assessment Maintenance

Primary Location: 163 Bellevue Parade, CARLTON NSW 2218  Current

Trading Name/Occupier: Description:

Assessment Number: 24876 5 Current

Rating Period: 2005/2006 >> 2005/06 Rates Generation

Floor No.	Floor Usage	Assessed Rent Equivalent Area	Assessed Rent Area	Assessed Rent Area Validation Code	Equivalent Area %	Assessed Rent Rate	Included With	Stat. Var. Net %	Gross Rent
1	RES	150.00	150.00	Owner/Agent advice	100.00	150.00		75.00	22,500
2	RES	150.00	150.00	Owner/Agent advice	100.00	150.00		75.00	22,500
3	RES	300.00	150.00	Owner/Agent advice	200.00	300.00		75.00	45,000

Area Totals: 600.00 450.00 Owner/Agent advice Capital Value:

Stat. Var.

Group Quantity Type of Unit Frequency Rent per Unit Net % Gross Rent

(none)

Stat. Var. % A/Con 0 ; Lifts 0 Non-House Carports

Rent per Month Rent per Week

Valuation Indicator: Proposed: Unknown Current:

Annual Value Exempt >>

Total Gross Rent 90,000 Statutory Gross Rent per Annum 21,840

Calculate Insert OK Cancel

Rental Assessment Form

Primary Location

The Primary Property/Parcel Description and Status. This includes a DETAIL button to drill down into the Property system. This field cannot be overridden.

Location Status

This is the current status of the selected property.

Trading Name

The Trading Name linked to the Property. If no Trading Name exists, then the Occupier. If there are multiple names, these are concatenated by Name and Address application. This field will be blank if no Trading Name or Occupier exist. This field cannot be overridden.

Property Description

The first current primary Land Use description. Cannot be overridden.

Assessment Number

The Assessment Number, Check Digit of the Assessment currently being maintained. Cannot be overridden.

Assessment Status

The Status of the Assessment currently being maintained. Cannot be overridden.

Rating Period

The Rating Period Code and Description pertaining to the Rental Record currently displayed. This includes a POP UP button to select other Rating Periods (not in the future) that Rental Records exist for the Assessment currently being maintained.

When the screen is first displayed, the next Rating Period is defaulted, and an empty record is displayed for creation if one does not already exist for the Assessment and next Rating Period. Selection of a Rating Period other than the next one will result in the associated Rental Record being displayed in enquiry mode.

Rating Period Description

The Rating Period Code Description pertaining to the Rental Record currently displayed.

Floor Number:

A code to hold the Floor level for the floor entry. Floors must be set up for this property using the structures option in the property system.

Valid codes are:

B1	1st basement
B2	2nd basement
B3	3rd basement
L	Land
G	Ground floor
MG	Ground floor Mezzanine
M1	1st floor Mezzanine
:	
M9	9th floor Mezzanine
1	1st floor
:	
31	31st floor
R	Roof
V	Multiple floors

Floor Number must be a valid code if it is entered (refer above). Floor Number must match the Property Structures system. Cannot enter a Floor Number if no Upper and Lower levels have been specified in Property Structures. Floor Number mandatory if Assessed Rent Area > 0.

Floor Usage:

Free format description of floor entry.

Assessed Rent Equivalent Area:

Result of (Assessed Rent Area x Equivalent Area Percentage). Cannot be overridden.

Assessed Rent Area:

The area of the floor entry that is multiplied by the Assessed Rent Rate to give the Gross Rent.

Assessed Rent Area must be entered if a Floor Number has been entered and the Assessed Rent Area Validation Code is not 'Unknown' or 'Not Applicable'.

Assessed Rent Area cannot be entered if Assessed Rent Area Validation Code is either 'Unknown' or 'Not Applicable'.

Assessed Rent Area Validation Code:

Hardcode table to indicate the accuracy of the Assessed Rent Area. Valid codes (in decreasing accuracy) are:

- Measured by surveyor
- Measured on site
- Digitised
- Scaled by ruler off plan
- Owner/Agent advice
- Unusable
- Unknown
- Not applicable

Equivalent Area %:

Multiplied by the Assessed Rent Area to give the Assessed Rent Equivalent Area. Any amount between 0.01 and 200.00 may be entered in this field. If a figure outside of this range is entered an error message will be displayed. The User will then be prompted to change the figure.

Assessed Rent Rate:

This figure is achieved by multiplying the Assessed Rent Area by the Equivalent Area. This figure is calculated by the system. Alternatively this figure can be overridden with another amount.

Included With:

Used to hold an Assessment Number of another Assessment. This secondary Assessment must have a Rental Record for the same Rating Period and the idea is that this record simply points to the primary Assessment's Rental Record. This field is not validated and no action is taken until the 'Calculate' button is pressed.

Included With must be blank if the Proposed Valuation Indicator is 'Included With, Not Exempt' or 'Included With, Exempt'.

Stat Var Net %:

Defaults to the percentage corresponding to the Statutory Variations % whenever an Assessed Rent Rate is entered. Can be overridden to one of the allowable values, but if the Statutory Variations % field is altered, then this field will be reset to the corresponding percentage.

Stat Var Net % cannot be entered if there is no Assessed Rent Rate. This field is mandatory if Assessed Rent Rate is entered and Proposed Valuation Indicator is 'Primary, Not Exempt'.

Gross Rent

Result of (Assessed Rent Rate x Assessed Rent Area) and rounded to the nearest dollar. Cannot be overridden.

Assessed Rent Equivalent Area Total

Sum of Assessed Rent Equivalent Areas for all floors. Cannot be overridden.

Assessed Rent Area Total

Sum of Assessed Rent Areas for all floors. Cannot be overridden.

Assessed Rent Area Validation Code

The Validation Code corresponding to the lowest level of Assessed Rent Area accuracy across all floors. Cannot be overridden.

Capital Value

Enter the Capital Value for the Rental Record being calculated. Capital Value must be between 1,000 and 600,000,000.

If Capital Value is entered, then values should not exist in :-

- Assessed Rent Rate on any Floor
- Rent per Week
- Car Park Rent per Month
- Rent per Unit on any Group

Floor Totals:

A non-database entity containing the total Assessed Rent Area for each different Floor Number. Cannot be overridden.

Group Quantity

Multiplied by the Rent per Unit and the Frequency multiplier to give the Gross Rent.

Type of Unit

Free format description of Group.

Frequency

Linked to a Frequency multiplier (e.g.. Monthly has a multiplier of 12). Multiplied by the Rent per Unit and the Group Quantity to give the Gross Rent. Valid Values are

- (none)
- Annual
- Half yearly
- Quarterly
- Monthly
- Fortnightly
- Weekly

Rent per Unit

Multiplied by the Group Quantity and the Frequency multiplier to give the Gross Rent. Cannot be entered if a Capital Value is entered.

Stat Var Net %

Defaults to the percentage corresponding to the Statutory Variations % whenever a Rent per Unit is entered. Can be overridden to one of the allowable values, but if the Statutory Variations % field is altered, then this field will be reset to the corresponding percentage.

Stat Var Net % cannot be entered if there is no Rent per Unit. This field is mandatory if Rent per Unit is entered and Proposed Valuation Indicator is set to 'Primary, Not Exempt'.

Gross Rent

Result of (Group Quantity x Frequency multiplier x Rent per Unit) and rounded to the nearest dollar. Cannot be overridden.

Stat Var %

Defaults to 'A/Con 0; Lifts 0'. This field controls the default values of each Stat Var Net % field. If this field is changed, then all Stat Var Net % fields are updated according to the table below:

A/Con 0 ; Lifts 0	-	75.00%
A/Con 7 ; Lifts 0	-	69.75%
A/Con 10 ; Lifts 0	-	67.50%
A/Con 7 ; Lifts 7	-	64.50%
A/Con 10 ; Lifts 7	-	62.25%
A/Con 10 ; Lifts 10	-	60.00%

Non-House Carparks:

Multiplied by the Rent per Month and then by 12 to give the Gross Rent.
This field is mandatory if a Rent per Month is entered.

Rent per Month

Multiplied by the Non-House Carparks, and then by 12 to give the Gross Rent.
Cannot enter Rent per Month if Capital Value entered.

Stat Var Net %

Defaults to the percentage corresponding to the Statutory Variations % whenever a Rent per Month is entered. Can be overridden to one of the allowable values, but if the Statutory Variations % field is altered, then this field will be reset to the corresponding percentage.

Stat Var Net % cannot be entered if no Rent per Month.

Stat Var Net % mandatory if Rent per Month entered and Proposed Valuation Indicator is 'Primary, Not Exempt'.

Gross Rent

Result of (Non-House Carparks x Rent per Month x 12) and rounded to the nearest dollar. Cannot be overridden.

Rent per Week

This amount is multiplied by 52 to give the Gross Rent.

Rent per Week must be null or > 1.00. Cannot enter Rent per Week if Capital Value entered.

Stat Var Net %

Defaults to the percentage corresponding to the Statutory Variations % whenever a Rent per Week is entered. Can be overridden to one of the allowable values, but if the Statutory Variations % field is altered, then this field will be reset to the corresponding percentage.

Stat Var Net % cannot be entered if no Rent per Week.

Stat Var Net % mandatory if Rent per Week entered and Proposed Valuation Indicator is 'Primary, Not Exempt'.

Gross Rent

Result of (Rent per Week x 52) and rounded to the nearest dollar. Cannot be overridden.

Proposed Valuation Indicator

Indicates the proposed status of the Rental Record in relation to the Rating Period displayed. Can be set to one of the below values:

- ☐ Primary, Not Exempt
- ☐ Primary, Exempt
- ☐ Unknown

A Primary record is one that is not Included With another record, but may have Included Withs of its own. If the status is set to 'Unknown' (the default value), the 'Calculate' button will be dimmed.

This field can also have the value of :

- ☐ Included With, Not Exempt
- ☐ Included With, Exempt

These values cannot be input by the user, but will be automatically selected by the system if the Assessment's Rental Record is Included With another Rental Record. This occurs as part of the process initiated by pressing the 'Calculate' button.

Proposed Annual Value

This field is used in two different ways.

If the Proposed Valuation Indicator is either 'Primary, Not Exempt' or 'Primary, Exempt'. Pressing the 'Calculate' button will validate the form, and if there are no errors, calculate the Proposed Annual Value by summing all of the Gross Rent figures having first multiplied them by their respective Stat Var Net % figures.

If the Proposed Valuation Indicator is set to 'Included With, Not Exempt' or 'Included With, Exempt', this field will hold the Assessment Number of the Primary Assessment that this Assessment's Rental Record is linked for the displayed Rating Period.

This field cannot be overridden and will have a display format that matches the data being displayed (i.e. no commas if it holding an Assessment Number).

The Proposed Valuation Indicator cannot be set to 'Primary, Not Exempt' if the Proposed Annual Value has not been calculated unless the 'Calculate' button is about to be pressed.

The Proposed Valuation Indicator cannot be set to 'Unknown' if a Proposed Annual Value has been calculated.

Proposed Exempt

This field (and associated Pop Up) allows a non-Rateable Reason Code to be entered against the Rental Record. This must be a valid code that has been set up within Rates Parameters.

This field is mandatory if the Proposed Valuation Indicator is set to 'Primary, Exempt'.

A Proposed Exempt code cannot be entered if the Proposed Valuation Indicator is not set to 'Primary, Exempt'

Current Valuation Indicator

Indicates the current status of the Rental Record in relation to the Rating Period displayed. This will simply be the Proposed Valuation Indicator for the previous Rating Period. Will be set to one of the below values:

- ☐ Primary, Not Exempt
- ☐ Primary, Exempt
- ☐ Included With, Not Exempt
- ☐ Included With, Exempt
- ☐ Unknown

This field cannot be overridden.

Current Annual Value

This field is used in two different ways.

If the Current Valuation Indicator is either 'Primary, Not Exempt' or 'Primary, Exempt', then this field may hold the Current Annual Value (i.e. the Proposed Annual Value for the previous Rating Period).

If the Current Valuation Indicator is set to 'Included With, Not Exempt' or 'Included With, Exempt', this field will hold the Assessment Number of the Primary Assessment that this Assessment's Rental Record is linked for the displayed Rating Period.

This field cannot be overridden and will have a display format that matches the data being displayed (i.e. no commas if it holding an Assessment Number).

Current Exempt

This field (with no associated Pop Up) shows any non-Rateable Reason Code that may have been entered against the previous Rating Period's Rental Record.

Total Gross Rent

The sum of the following fields:

Gross Rent for each Floor

Capital Value (only if all other Gross Rent fields are blank)

Gross Rent for each Group

Non-House Carparks Gross Rent

Rent Gross Rent

This total is calculated on the fly and is re-calculated whenever one of the above fields is changed in any way. Cannot be overridden.

Statutory Gross Rent per Annum

Defaults from the Rental Analysis form. Note that it is possible for this field to be updated in the following scenario.

If the Other Outgoings (+) or (-) Amount on the Rental Analysis form is null but the corresponding Rate has been entered, then whenever the Total Assessed Rent Area is updated (for example by adding a Floor record), the Other Outgoings (+) or (-) Amount will be re-calculated by multiplying the Rate by the Total Assessed Rent Area. This will in turn force re-calculation of the Adjusted Gross Face Rent per Annum and therefore the Statutory Gross Rent per Annum. This will be updated to the Rental Assessment form whenever the Total Assessed Rent Area is updated.

Note that in this scenario, the condition that the Other Outgoings (+) or (-) Amount must be between 100 and 3,000,000 will NOT be validated. This will occur whenever the Rental Analysis form is next accessed.

Calculate Button

This button performs the form validation in addition to calculating the Proposed Annual Value and validating and processing any entered Included With fields. The Button is hidden if the Proposed Valuation indicator is set to either 'Included With, Not Exempt' or 'Included With, Exempt' OR the Rental Record displayed is for a Rating Period prior to the Current Rating Period.

The Button is dimmed if the Proposed Valuation Indicator is set to 'Unknown'.

Pressing this button will activate the form validation including any Included With entries (refer validation rules below). For valid entries, access the displayed Rental Record for the Included With Assessment and do the following:

Change the Proposed Valuation Indicator to 'Included With, Not Exempt' if it was 'Primary, Not Exempt', and to 'Included With, Exempt' if it was 'Primary, Exempt'.

Change any Proposed Annual Value to the Assessment Number of the Primary Assessment.

The button will also calculate the Proposed Annual Value as described in the paragraph against this field.

Insert

This button will insert a new Floor occurrence if focus is on the Floor entity and a new Group occurrence if focus is on the Group entity. If the focus is on neither of these entities, then the user will be prompted as to the entity they wish to add an occurrence.

Button is hidden if the Rental Record displayed is for a Rating Period prior to the Current Rating Period.

MASS Appraisal Data

The Mass Appraisal Maintenance form is available from the Property Maintenance – Property Options form and from the Assessment Summary form. These options will only be available when the Valuations Authorised Function “Valuations, NZ VSP Load” is set on.

NOTE: Access to the new “Valuation Mass Appraisal Data” Option for either Property or Rates must be assigned.

Mass Appraisal Maintenance Form

Mass Appraisal data can be created and maintained by either importing a file of data through the VG Update process or on-line via the Mass Appraisal Maintenance forms. When imported, the data will be validated against parameters and exceptions written for invalid entries.

The following rules will be applied to the data displayed depending on where the option has been called from.

PROPERTY MAINTENANCE	ASSESSMENT SUMMARY
Rating Year is NOT Displayed.	Rating Year is Displayed.
The latest Mass Appraisal Data available regardless of the current rating period is displayed.	The latest Mass Appraisal Data available for the selected rating period and the values applicable for that rating period is displayed. Screen initially displays current rating period.

This option is available where the following conditions are met:

- Property is the Primary Property for the Current Rates Assessment
- The Current Rates Assessment has a current link to a current VG Number.

If in Rates, and No Mass Appraisal Data exists for the Rating Year being displayed, if there exists Valuations for the VG Number for the Rating Year, then a “New” Button is made available to enable Mass Appraisal Data to be manually entered. If no Valuations exist for the Rating Year, then no manual entry will be allowed.

If in Property, the latest Mass Appraisal Data linked to the latest valuation for the property will be displayed.

Mass Appraisal Maintenance Form

Primary Location

This field displays the formatted address of the Primary location of the Assessment.

Property Description

This field displays the Property Description.

VG

This field displays the formatted VG Number (Roll/Assessment/Suffix).

Sales Group

This field displays the Mass Appraisal Sales Group. It is a 4 char code incorporating both the Council Code and Sales Group Code.

Rating Period

This field is only displayed if the Mass Appraisal Maintenance form has been selected from Rates Accounting. It will not be displayed when the Mass Appraisal Maintenance form is selected from Property. Select the Rating Period from the Pop up to display the Mass Appraisal Data for that Rating Period.

Mass Appraisal – Improvements

This field displays the improvements made to the property.

Mass Appraisal – Tenure Type

This field displays the tenure type of the property. Valid choices are:

- 0
- 1 Not Leased (Owner is Occupier)
- 2 Not Leased (Owner diff from Occ)
- Clearly Leased

Mass Appraisal – Owner Entity Code

This field displays how the property is owned. Valid choices are:

- 0
- 1 Individual
- 2 Company (not Crown Owned)
- 3 Crown – Ministries/Department
- 4 TLA or Regional Council
- 5 Crown Owned – SOE/Hosp/Educat/?
- 6 Dummy
- 7 Dummy

Mass Appraisal – Rateability Code

This field displays the rateability code of the property. Valid choices are:

- 1 Rateable
- 4 Non Rateable-Special grant
- 5 Non-rateable
- 6 Part non-rateable

Mass Appraisal – Apportionment Type

This field displays the apportionment type of the property. Valid choices are:

- 0 Not Applicable
- 1 Rating Appmt
- 2 Separate Valuation
- 3 Part Property in Sra
- 5 Apportionment Follows
- 6 Separate Valuation Follows
- 7 Ground Lease Apportionment

Mass Appraisal – Special Code SPEC

This field displays the special code associated with the property. Valid choices are:

- 0
- 1 Sec 22
- 2 Sec 23
- 5 Sec 24
- 6 Sec 25
- 7 Sec 26
- 8 Sec 202/3
- 9 Sec 27
- Trees

Mass Appraisal – Property Category Type

This field displays the property category of the property. Valid choices are:

- A1
- AN
- DF
- DT
- PR
- PG
- PF
- PS
- SA
- SD
- SH
- SP
- SS
- SX
- HB
- HC
- HF
- HG

- HK
- HM
- HP
- HS
- HV
- HX
- LV
- LI
- MC
- MG
- MO
- ML
- MR
- MP
- MX
- FI
- FE
- FP
- FV
- RD
- RH
- RF
- RR
- RC
- RV
- RM
- RB
- CV
- CO
- CR
- CA
- CE
- CM
- CL
- CP
- CT
- CC
- CX
- CS
- IV
- IH
- IL
- IN
- IS
- IW
- IX
- OE
- OR
- OH
- OS
- OP
- OM
- OU
- OX
- OV
- OA

Mass Appraisal – Production

This field displays the production value of the property.

Mass Appraisal – Land Use

This field displays the property land use. The Land Use codes available come from the Property module. Either enter a value or select one from the pop up.

Mass Appraisal – Land Zone Group

This field displays the land zone group for the property. Either enter a value or select one from the pop up.

Mass Appraisal – Percentage Subdivisible

This field displays the percentage of the property that is subdivisible.

Mass Appraisal – House Type

This field displays the type of house on the property. Valid choices are:

- AP Apartment
- BN Bungalow (Post War)
- CN Contemporary
- CT Cottage
- PB Pre-war Bungalow
- QB Quality Bungalow
- QO Quality Old
- RB Bach
- SB Spanish Bungalow
- SR State Rental
- TC Terrace Apartments
- TH Townhouse
- UN Unit
- VL Villa

Mass Appraisal – Modernisation

This field displays if modernisation has occurred or not. Valid choices are:

- (none)
- Yes
- No

Mass Appraisal – Effective Year Built

This field displays the year that the property was built on.

Mass Appraisal – Building Age Type

This field displays the building age type of the building on the property.

Mass Appraisal – Building Site Cover

This field displays how much of the property the building covers.

Mass Appraisal – Wall Construction

This field displays the wall construction of the building on the property. Valid choices are:

- (blank)
- A Aluminium
- B Brick
- C Concrete
- F Fibre Cement
- G Glass
- I Steel/G-Iron
- M Malthoid/Fab
- P Plastic
- R Roughest, etc
- S Stone
- T Tile Profile
- W Weatherboard
- X Mix.Material
- Z N/A

Mass Appraisal – Building Floor Area

This field displays the floor area of the building on the property.

Mass Appraisal – Roof Construction

This field displays the roof construction of the building on the property. Valid choices are:

- (blank)
- A Aluminium
- B Brick
- C Concrete
- F Fibre Cement
- G Glass
- I Steel/G-Iron
- M Malthoid/Fab
- P Plastic
- R Roughest, etc
- S Stone
- T Tile Profile
- W Weatherboard
- X Mix.Material
- Z N/A

Mass Appraisal – Total Floor Area

This field displays the total floor area of the building on the property.

Mass Appraisal – Floor Construction

This field displays what the floor of the building is constructed out of. Valid choices are:

- (blank)
- A Aluminium
- B Brick
- C Concrete
- F Fibre Cement
- G Glass
- I Steel/G-Iron
- M Malthoid/Fab
- P Plastic
- R Roughest, etc
- S Stone
- T Tile Profile
- W Weatherboard
- X Mix.Material
- Z N/A

Mass Appraisal – No. of Buildings

This field displays the number of buildings on the property.

Mass Appraisal – Wall Condition

This field displays the condition of the walls on the building on the property. Valid choices are:

- A Average
- G Good
- P Poor
- F Fair
- X Mixed

Mass Appraisal – Units of Use

This field displays the units of use of the property.

Mass Appraisal – Roof Condition

This field displays the condition of the roof of the building on the property. Valid choices are:

- A Average
- G Good
- P Poor
- F Fair
- X Mixed

Mass Appraisal Data Maintenance Form

This form holds additional Mass Appraisal data information.

Mass Appraisal Data Maintenance Form

Primary Location

This field displays the formatted address of the Primary location of the Assessment.

Property Description

This field displays the Property Description.

VG

This field displays the formatted VG Number (Roll/Assessment/Suffix).

Sales Group

This field displays the sales group of the property. It is a 4 char code incorporating both the Council Code and Sales Group Code.

Rating Period

This field is only displayed if the Mass Appraisal Maintenance form has been selected from Rates Accounting. It will not be displayed when the Mass Appraisal Maintenance form is selected from Property. This field displays the Rating Period selected on the Mass Appraisal Maintenance form.

Mass Appraisal – Number of Floors

This field displays the number of floors on the building on the property.

Mass Appraisal – Number of Bedrooms

This field displays the number of bedrooms that the building on the property has.

Mass Appraisal – Number of Bathrooms

This field displays the number of bathrooms that the building on the property has.

Mass Appraisal – Toilets

This field displays the number of toilets that the building on the property has.

Mass Appraisal – Laundry

This field displays if the property has a laundry. Valid choices are:

- (none)
- Yes
- No

Mass Appraisal – Large Improvements

This field displays if the property has a large improvement. Valid choices are:

- (none)
- Yes
- No

Mass Appraisal – Deck

This field displays if the property has a deck. Valid choices are:

- (none)
- Yes
- No

Mass Appraisal – Free Standing Garages

This field displays the number of free standing garages.

Mass Appraisal – Main Roof Garages

This field displays the number of garages under the main roof.

Mass Appraisal – Carparks

This field displays the number of car parks.

Mass Appraisal – Car Access

This field displays if the property has car access. Valid choices are:

- (none)
- Yes
- No

Mass Appraisal – Driveway

This field displays if the property has a driveway. Valid choices are:

- (none)
- Yes
- No

Mass Appraisal – Maori Land

This field displays if the property is Maori land. Valid choices are:

- (none)
- Yes
- No

Mass Appraisal – Landscaping Quality Type

This field displays the quality of the landscaping. Valid choices are:

- A Average
- G Good
- P Poor
- F Fair

Mass Appraisal – Class of Surrounding Improvements

This field displays the class of surrounding improvement for the property. Valid choices are:

- 1 Poor Quality

- 2 Below Average
- 3 Average Quality
- 4 Above Average Quality
- 5 Superior Quality

Mass Appraisal – Shelter Belts/Trees Value

This field displays the shelter belts or trees value to the property.

Mass Appraisal – View Type

This field displays the view type of the property. Valid choices are:

- N Non Appreciable View
- O Focal Point of View – Other
- W Focal Point of View – Water

Mass Appraisal – Mass Appraisal View Scope

This field displays the scope of the view that the property has. Valid choices are:

- M Moderate
- N None
- S Slight
- W Wide

Mass Appraisal – Contour Type

This field displays the contour type of the land for the property. Valid choices are:

- EF Easy/Moderate Fall
- ER Easy/Moderate Rise
- LV Level
- SF Steep Fall
- SR Steep Rise

Mass Appraisal – Lot Position Type

This field displays the position type of the lot for the property. Valid choices are:

- C Corner
- I Inside
- R Rear

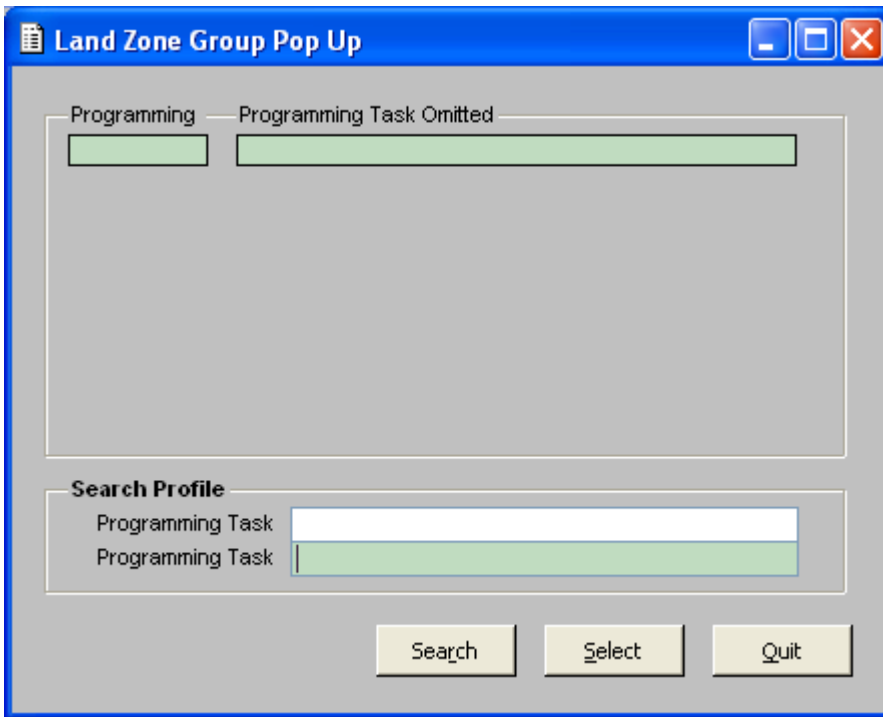
Mass Appraisal – Outlier Property

This field displays if the property is an outlier property or not. Valid choices are:

- (none)
- Yes
- No

Land Zone Group Pop Up

This form provides a pop up of the Land Use Codes entered in the Land Use Zone parameter.

The image shows a software window titled "Land Zone Group Pop Up" with a blue title bar and standard Windows window controls (minimize, maximize, close). The main area is light gray. At the top, there are two tabs: "Programming" (selected) and "Programming Task Omitted". Below the tabs are two green rectangular buttons. A large, empty rectangular box occupies the middle section. At the bottom, there is a "Search Profile" section containing two labels, "Programming Task", each followed by a text input field. The first input field is white, and the second is green. Below these fields are three buttons: "Search", "Select", and "Quit".

Land Zone Group Pop Up form

Land Zone Code

This field displays the Land Zone Group Code.

Land Zone Description

This field displays the description associated with the Land Zone Group Code.

Search Profile – Land Zone Code

Enter a Land Zone Group Code or partial Land Zone Group Code to search for.

Search Profile – Land Zone Description

Enter a Land Zone Group Description or partial Land Zone Group Description to search for.

Batch Processing Functions

The following topics are covered in this section:

[Bulk Rental Assessment Import/Caluclation](#)

[Copy Valuations](#)

[Averaged Values Options](#)

[Rental Valuations Generation](#)

[Valuer General Update](#)

Bulk Rental Assessment Import/Calculation

Bulk Rental Assessment Import/Calculation Control Form

This new option allows one of two distinct functions to be performed. Firstly, it allows the Proposed Annual Value to be calculated in bulk over a range of Assessments, and secondly, it allows for Rental information to be imported and updated in bulk, with the additional option to calculate the Proposed Annual Value for these imported records.

Bulk Rental Assessment Import/Calculation Control Form

Perform Bulk Calculation Checkbox

Tick On this option if a Calculation for Rental Assessments is being performed.

Search Method

Select a Search Method from the dropdown. There are 3 options:-

- Reference Number Range
- Assessment Range
- Search System

Reference Type

Click the Pop Up button to select a Reference Type from the Pop Up form. Alternatively the reference may be manually typed in (if already known).

Reference Range

Enter a Reference Range on which to base your search. These fields may be left blank to consider all records.

Assessment Range

Enter an Assessment Number Range on which to base your search. These fields may be left blank to consider all records.

Query Result

Click the Pop Up button to select a Query Result from the Pop Up form. Alternatively the Query Name may be typed in manually (if already known).

Please note that only queries based on the LRAASSM entity are available for selection.

Perform Import Checkbox

Click ON this option if an Import of Rental Assessments is being performed.

Import Type

Select either CSV or XML format for the Import File.

Import Rental Valuations Checkbox

Tick ON this option if Rental Valuations are to be imported at this time.

This field is only displayed if CSV format is selected.

Import File

Click on the Pop Up button and then navigate to where the Valuations File is located. Double Click on the file or single click and then click the Open button.

You will then be returned to the Bulk Rental Assessment Import/Calculation Control Form and the selected file will be displayed.

Format

Click on the Pop Up button and select a Format for the import file from the Pop Up Form displayed.

Import Rental Floors Checkbox

Tick ON this option if Rental Floors are to be imported at this time.

This field is only displayed if CSV format is selected.

Import File

Click on the Pop Up button and then navigate to where the Floors File is located. Double Click on the file or single click and then click the Open button.

You will then be returned to the Bulk Rental Assessment Import/Calculation Control Form and the selected file will be displayed.

Format

Click on the Pop Up button and select a Format for the import file from the Pop Up Form displayed.

Import Rental Groups Checkbox

Tick ON this option if Rental Groups are to be imported at this time.

This field is only displayed if CSV format is selected.

Import File

Click on the Pop Up button and then navigate to where the Groups File is located. Double Click on the file or single click and then click the Open button.

You will then be returned to the Bulk Rental Assessment Import/Calculation Control Form and the selected file will be displayed.

Format

Click on the Pop Up button and select a Format for the import file from the Pop Up Form displayed.

Processing Parameters – Run Mode

Select Report Only, Update Only or Report & Update for the Run Mode of the process.

Report Only – Allows users to view affected assessments before any processing has taken place.

Update Only – Rental details will be updated. No report is produced.

Report & Update – Rental details will be updated and a report will be produced showing affected assessments.

Processing Parameters – Rating Period

Select a Rating Period from the Pop Up Form for the Rental details to take effect from.

Alternatively the Rating Period may be manually typed in (if already known).

Processing Parameters – Perform Calculation on Imported Records Checkbox

Tick ON this option if a Calculation on Imported Records is to be performed at the time of the import. This checkbox is not available to use if the Run Mode selected is 'Report Only'.

Bulk Valuer General Maintenance Control

This function provides the ability to create a Valuer General Number and to link it to a number of Assessments without the need to manually maintain each individual Assessment.

Assessment No.	Property	Ratepayer	
3	4	387 King William Street, ADELAIDE SA 5001	K Karafotias and B Roussos ...
4	2	"OLD ADELAIDE INN", 142-158 O'Connell Street, NORTH ADELAIDE SA 5	Sextant Properties P/L ...
5	9	GROUND 23-27 Halifax Street, ADELAIDE SA 5001	Cw Robinson & Co P/L ...
6	7	15-19 Halifax Street, ADELAIDE SA 5001	Cw Robinson & Co P/L and M ...
7	5	"BEEHIVE CORNER BUILDING", 6 Rundle Mall, ADELAIDE SA 5001	No 6 Rundle Mall P/L ...
8	3	Level 5H-6I Adjacent Unit 51F-52G/52A-56E Brougham Place, NORTH A	52 Brougham Place P/L and I ...
9	1	4 41/52-56 Brougham Place, NORTH ADELAIDE SA 5006	52 Brougham Place P/L and I ...
10	9	"Suite 20", Plaza 1A-8H Opposite Apartment 1L-10U/10A-20K O'Connell	Mrs A J Morris ...
11	7	"Suite 15", 1 12-20 O'Connell Street, NORTH ADELAIDE SA 5006	117-119 Ward Street P/L and ...

Processing Options

VG Number

Run Type **Report Only**

Buttons: Delete, Insert, Options, Process, Cancel

Bulk Valuer General Maintenance Control Form

To use this function nominate the Valuer General Number that is to be created and select the Assessments (via the Insert button) that the Valuer General Number is to be linked to. Run the function in Report Only mode (in which no updating occurs) to view the messages on the Exception Report before running the function again in Update and Report mode. The number of Assessments the Valuer General Number is now linked to is advised in the Processing Summary for the job.

Note:-

1. If the Valuer General Number already exists (e.g. created manually) it will be used to link to the nominated Assessments instead of creating another Valuer General Number record.
2. If the job fails partway through the job can be restarted via the relevant Batch Processing menu option.

Assessment Number

This field displays the Assessment Number.

Check Digit

This field displays the Assessment Check Digit.

Property

This field displays the Location Description.

Ratepayer

This field displays the Ratepayer Names.

Detail Button

Select the Detail button to view the Assessment Summary details.

Valuer General Number

Enter the Valuer General Number that is to be created and linked to the selected Assessments.

Run Type

Select the Run Type. Options are:

- Report Only – no updates will occur.
- Update and Report – updates will occur.

Copy Valuations

Copy Valuations Control Form

This function easily allows valuations to be copied from one Rating Year to another Rating Year. Land Valuations can be copied by themselves, however for Rateable Valuations to be copied; the Land Valuations must be copied also. Valuer General Number ranges can be selected for copy; alternatively a query result may be selected.

The Rateable Valuation Copy fields will be dimmed unless the Copy Rateable Valuations Option is ticked ON.

Valuations are only copied from one year to another if a Valuation does not already exist for the Valuation Year to Copy To.

Copy Valuations Control Form

Search Method

There are 2 Search options available and these are:

- VG Number Range
- Search System

VG Number Range – a range of numbers may be entered eg 10000 to 20000. Alternatively, if a number range is not entered, then all VG numbers will be assumed.

Search System – a query result may be selected from the Pop Up form (which is displayed after clicking on the Pop Up button).

VG Number Range

Enter a range of numbers to be considered. If a number range is not entered, then all VG Numbers will be considered.

Query Result

Click on the Pop Up button to display the Query Selection form, from which a selection may be made. The description of the selected query will be displayed in the Query Result field.

Effective Date

Enter an effective date for the Valuations. This will be the effective date applied to the new valuations after the copy is completed.

Copy Rateable Valuations

Tick on this option if Rateable Valuations are to be copied along with the Land Valuations. If Rateable Valuations are not required, then leave this option OFF.

Valuation Year to Copy From

Type in a Valuation Year to copy from, or make a selection from the Pop Up Form. The "Copy From" Year must be before the "Copy To" Year.

Valuation Year to Copy To

Type in a Valuation Year to copy to, or make a selection from the Pop Up Form. The "Copy To" Year must be after the "Copy From" Year.

Rateable Valuation Year to Copy From

Type in a Rateable Valuation Year to copy from, or make a selection from the Pop Up Form. The "Copy From" Year must be before the "Copy To" Year.

Rateable Valuation Year to Copy To

Type in a Rateable Valuation Year to copy to, or make a selection from the Pop Up Form. The "Copy To" Year must be after the "Copy From" Year.

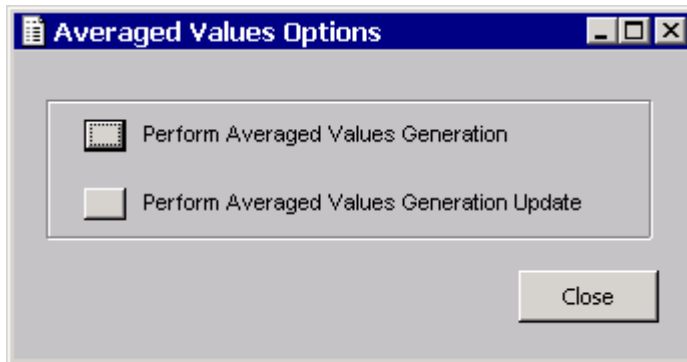
Valuation Type

The Valuation type list box displays a list of all active Valuation Types which will be included or excluded in the copy process of Valuation types from one Valuation year to another. As a default, all Valuation Types will be selected. To exclude a Valuation type from being copied, click on the Valuation type to deselect the record.

NOTE: if Copy Rateable Valuations has been selected, the Valuation Type list box will be dimmed

Averaged Values Options

Averaged Values Options Form

The screenshot shows a Windows-style dialog box titled "Averaged Values Options". It has a standard title bar with minimize, maximize, and close buttons. The main area contains two options, each with a small icon to its left: "Perform Averaged Values Generation" and "Perform Averaged Values Generation Update". Both options are currently unchecked. At the bottom right of the dialog is a "Close" button.

Averaged Values Options Form

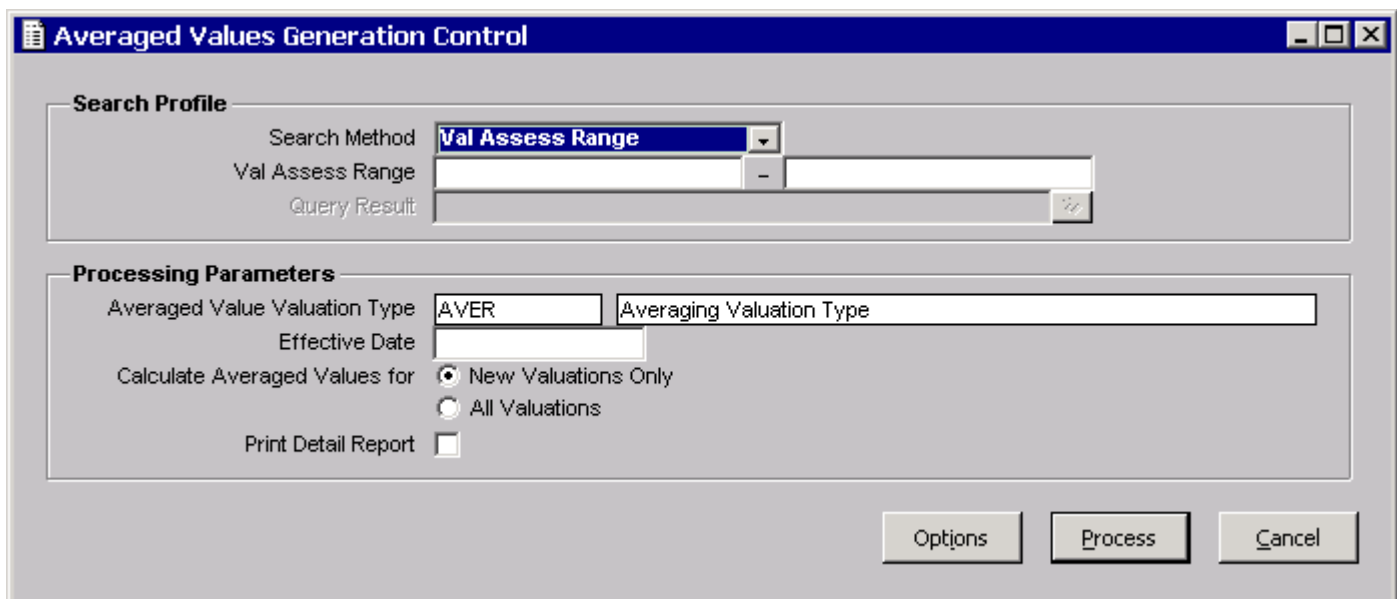
Perform Averaged Values Generation

This button navigates to the Averaged Values Generation Control Form where Averaged Values can be generated.

Perform Averaged Values Generation Update

This button navigates to the Averaged Values Generation Update Control Form where generated Averaged Values can be updated.

Averaged Values Generation Control Form

The screenshot shows a Windows-style dialog box titled "Averaged Values Generation Control". It has a standard title bar with minimize, maximize, and close buttons. The dialog is divided into two main sections. The "Search Profile" section contains a "Search Method" dropdown menu set to "Val Assess Range", a "Val Assess Range" text input field, and a "Query Result" button. The "Processing Parameters" section contains several fields and options: "Averaged Value Valuation Type" (set to "AVER"), "Effective Date" (empty), "Averaging Valuation Type" (empty), "Calculate Averaged Values for" with two radio buttons ("New Valuations Only" is selected, "All Valuations" is unselected), and "Print Detail Report" (unchecked). At the bottom right of the dialog are three buttons: "Options", "Process", and "Cancel".

Averaged Values Generation Control Form

Search Method

Select the Search Method that the generation is to be run over. The terminology of the Range is prefixed by the entry in the Terminology field on the System Parameter Maintenance form. Valid options are:

- “Terminology” Range

This method will search over Valuations Numbers.

- Search System

This method uses a Query Result from the LVLPROP entity.

VG Number Range

The label on this field prefixed by the entry in the Terminology field on the System Parameter Maintenance form. Enter a “Terminology” Range if Averaging is to be restricted to this range.

Query Result

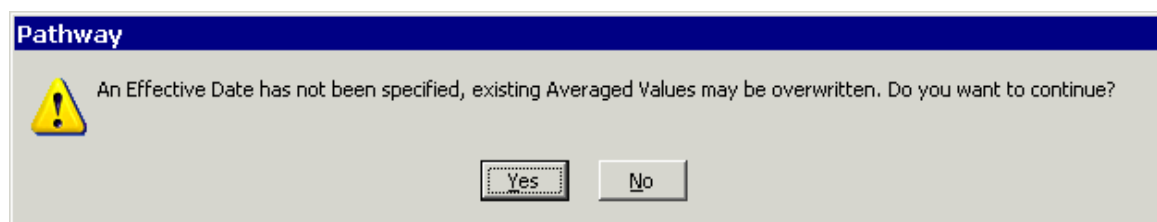
Enter or select from the pop up a Query Result to use to perform Averaging.

Averaged Value Valuation Type

This field defaults to the entry in the Averaged Value Valuation Type field on the Averaging of Values Parameter Maintenance form.

Effective Date

Enter the Date Effective for Averaged Values. If no effective date is entered and all valuations are selected at the Calculate Averaged Values for option, then a message will be displayed to the user, warning that existing averaged values may be overwritten.



Calculate Averaged Values for

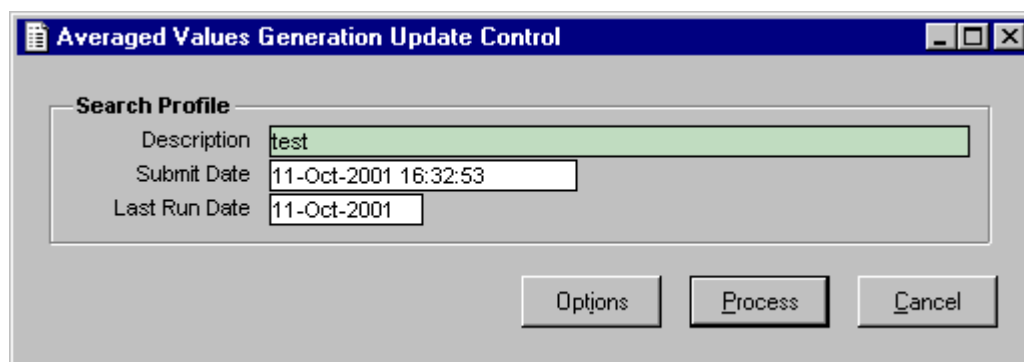
There are 2 options to choose from (only 1 may be selected at the one time):-

- New Valuations Only – if this option is selected, only those valuations that do not have an averaged value already will be selected for processing.
- All Valuations – if this option is selected, then all valuations will be selected for processing, whether they have an averaged valuation or not.

Print Detail Report

Tick this option ON if a Detailed Report is required.

Averaged Values Generation Update Control Form



Averaged Values Generation Update Control Form

Description

This field displays the Description of the Averaged Values Generation to be updated. This field is not maintainable.

Submit Date

This field contains the date and time that the Averaged Values Generation was submitted.

Last Run Date

This field contains the date and time that the Averaged Values Generation update actually ran.

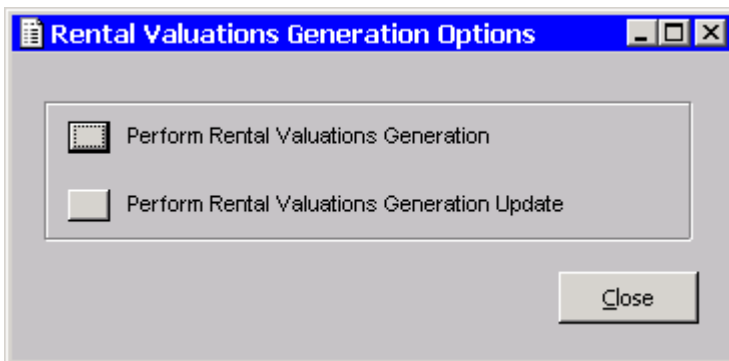
Rental Valuations Generation

The processing of Rental Valuations was designed specifically for Adelaide City Council. The process is in two parts: -

1. Generation
2. Update

Rental Valuations Generation Options Form

This form enables the user to select to either generate or update the Rental Valuations



Rental Valuations Generation Options Form

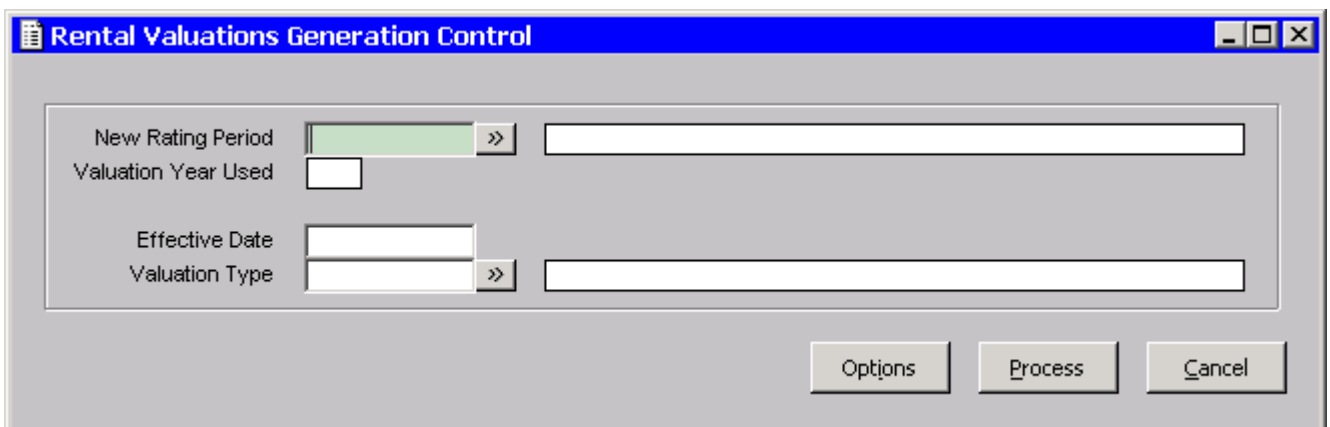
Perform Rental Valuations Generation

Selection of this option will enable the user to perform Rental Valuations Generation

Perform Rental Valuations Update

Selection of this option will enable the records created during the generation function to be updated to the assessment records.

Rental Valuations Generation Control Form

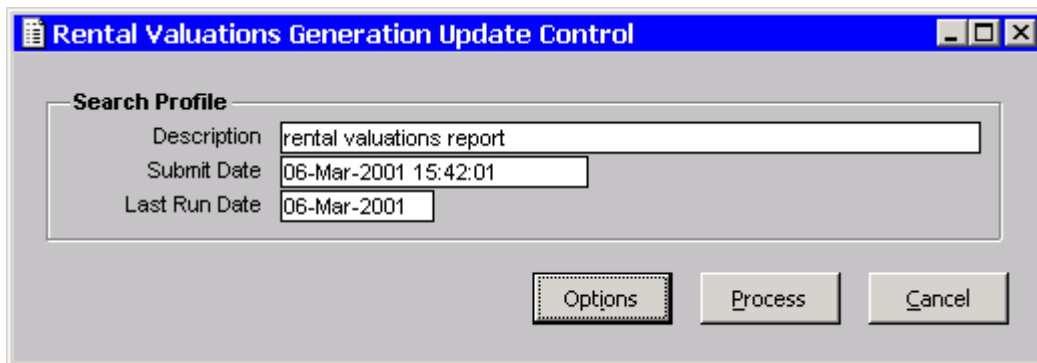


Rental Valuations Generation Control Form

New Rating Period

Valuation Year

Effective Date

Valuation Type**Rental Valuations Update Control Form**

The screenshot shows a Windows-style dialog box titled "Rental Valuations Generation Update Control". It features a "Search Profile" section with three input fields: "Description" containing "rental valuations report", "Submit Date" containing "06-Mar-2001 15:42:01", and "Last Run Date" containing "06-Mar-2001". At the bottom of the dialog are three buttons: "Options" (with a dotted border), "Process", and "Cancel".

*Rental Valuations Update Control Form***Generation Update Details**

These fields contain details that identify the last generation run.

Valuer General Update

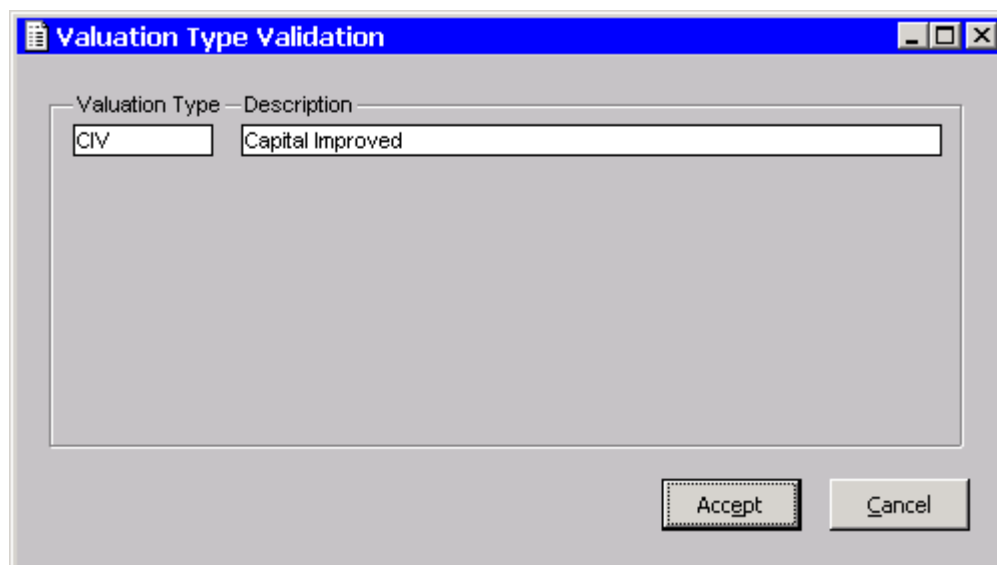
The Valuer General Valuation Update function provides the ability to load new valuations and additional selected Property and Rating data elements. This information is received via file from various state departments, and is loaded into the Pathway Rates, Valuations and Property systems.

The Valuation Import has the following features: -

- (1) User definable import layouts. These layouts need to be defined via the Query/Query Parameters/Export Import Format Maintenance.
- (2) The ability to process all the options in 'Report Mode'. This enables the matching performed to be checked and any exception messages reviewed, prior to performing the final import.
- (3) The ability to override previously loaded valuations, or creates new records, by determining whether the correction number is to be incremented.
- (4) The need to load the valuation file only once and run the processing multiple times, using this pre-loaded data.
- (5) The ability to select which reports are selected, and the level of detail required for valuation reporting.
- (6) The ability to process valuation details either separately from, or together with the additional details. Various combinations of report only and update can be selected when determining what details are to be processed

Before the Valuer General Valuation Update function can be run an Import Format must be created. This Import Format tells the system the location of the relevant data elements within the Import File.

Valuation Type Validation Form



Valuation Type	Description
CIV	Capital Improved

Accept Cancel

Valuation Type Validation Form

Valuation Type and Description

Highlight the Valuation Type and select the Accept Button to move to the Valuer General Update form.

Valuer General Update Form

Valuer General Update Form

Search Profile – Import Format

Select the pop up button to access the Export/Import Format Pop Up form. Select the appropriate Import Format.

Search Profile – Entity

These fields will be automatically populated upon selection of the Import Format.

Processing Options

Click on the button selected for the process. The options are as follows:

- Report Only
- Update Only
- Update and Report

Import File

Select the pop up button to access the file to be loaded.

Processing Parameters – New Valuation Year

Select the pop up to access the Valuation Year Pop Up form. Select the appropriate Valuation Year.

Processing Parameters – Effective Date

Insert the date from which the upload is to be effective. Double clicking on the field will access the System Calendar to assist in date selection.

Processing Parameters – Increment Correction Number

Check this box if the Valuation Correction Number is to be incremented during update.

Valuation Report Layout

Select this button if a report is required. The options are as follows:

- Detail
- Summary

Print Minimum % Difference Report

Check this box if a report is required comparing the updated information with that already on the file.

Minimum Percentage Difference

Insert in this field the Percentage Variance Difference to be reported on.

Comparison Valuation Year

Select the pop up to access the Valuation Year Pop Up. Select a Valuation Year on which the comparison is to be made.

Print Tenancy Valuation Report

Check this box if a Tenancy Valuation Report is required.

Print Improvement Exceptions

Check this box if a Report is required on increased Valuations due to improvements.

Print Missing VG Numbers

When checked on, all current VG Numbers for which a value was not included in the import file will be reported. This field would normally be checked ON for a full revaluation upload. This field would normally be checked OFF for a progressive (partial) import.

More Button

Selection of the More Button displays the Valuer General Update Control Options Form where state specific requirements can be imported and updated.

Tracking Button

Select this button to access the Tracking Selection form.

If Tracking criteria has been nominated the process will, for each VG processed, determine the first current Assessment that is currently linked to the VG. That Assessment's Activities will be checked to see if it matches the Tracking criteria and if so the processing will continue. If no Assessment is found the VG will not be processed.

Valuer General Update Control Options Form

This form provides the ability to accommodate different states requirements. An Import Format must have previously been formatted in the Query Import/Export Facility.

For instance the S.A. Requirements for Tenancy Apportion Merits, Queensland for importing Land Use Codes, Western Australia for importing ESL Category / Property Use codes and Number of Sub-Properties. Options are available to load the following details from a Valuer General file:

- Valuations
- Local Government Codes
- Rate Types
- Property Land Use Codes
- Zone Codes
- Pensioner Details
- ESL Category / Property Use Codes
- Number of Sub-Properties

Valuer General Update Control Options Form

Second Import Format

The label of this field will change depending on the Valuation Tape Legislation selected under the Valuation Parameters. Select the pop up to access the Export/Import Format Pop Up. Select the appropriate format.

Valuations – Run Type

Select the drop-down to access the following options:

- Don't Process
- Report Only
- Update Only
- Update & Report

Local Government Codes – Run Type

Select the drop-down to access the following options:

- Don't Process
- Report Only
- Update Only
- Update & Report

Rate Types – Run Type

Select the drop-down to access the following options:

- Don't Process
- Report Only
- Update Only
- Update & Report

Land Use Codes – Run Type

Select the drop-down to access the following options:

- Don't Process
- Report Only
- Update Only
- Update & Report

In NZ mode, if the Mass Appraisal Data upload is being carried out (with or without concurrent Valuation Upload), the Land Use Code update into the Property file will be loaded from the Land Use Code in the Mass Appraisal Data import file field, but only if Update Land Use is selected. (i.e. Not from the Valuation Upload file).

Land Use Codes – Update Level

Select the drop-down to access the following options:

- Property
- Parcel
- Property & Parcel

Zone Codes – Run Type

Select the drop-down to access the following options:

- Don't Process
- Report Only
- Update Only
- Update & Report

Zone Codes – Update Level

Select the drop-down to access the following options:

- Property
- Parcel
- Property & Parcel

Pensioner Details – Run Type

Select the drop-down to access the following options:

- Don't Process
- Report Only
- Update Only
- Update & Report

Pensioner Details – Pensioner Type

Select the pop up to access the Beneficiary Type Pop Up. Select the appropriate Pensioner Type.

ESL Category / Property Use

Select the drop-down to access the following options:

- Don't Process
- Report Only
- Update Only
- Update & Report

Number of Sub-Properties

Select the drop-down to access the following options:

- Don't Process
- Report Only
- Update Only
- Update & Report

Nominated Rate Types – Run Type

Select the drop-down to access the following options:

- Don't Process
- Report Only
- Update Only
- Update & Report

Nominated Rate Types – Rate Types

Select the Rate Types to be added/updated.

Rate Types are added/updated for the Assessments related to the VG Numbers supplied in a file. The import file is to be a csv file with each record having the VG number as the first item.

When selected for update each selected Rate Type will be added for the current Rating Period for the Assessment that relates to each VG number in the file provided, providing the Rate Type does not already exist. If Tracking selections are nominated then only the matching Assessments will be processed.

Nominated Rate Types – Suspend Date

Set as required. The added/updated Rate Types will have their Suspended Date set to the setting. For each selected Rate Type the Assessment Rate Type (regardless if it was added or already existed) will have its Suspended Date set to the Suspend Date - Note: if no Suspend Date parameter was nominated then the added/updated Rate Type will be set to have no Suspended Date present. If the Rate Type is a Unit Based Rate Type then the Number of Units on the Assessment Rate Type will be set to 1. If the Assessment has a current Part Non-Rateable Activity then the added/updated Assessment Rate Type will have the Rateability Percentage set to 50%, otherwise it will be empty.

GIS References

Select the drop-down to access the following options:

- Don't Process
- Report Only
- Update Only
- Update & Report

This section allows targeted Properties to have their property level GIS References to be refreshed to reflect the GIS References supplied in a file.

When the GIS References Run Type is set to Update and Report or Update Only then the Property GIS References will be updated in two stages:-

1. All property level GIS References will be removed for all properties that are currently linked to all current Rates Assessments. The Tracking facility can be used to limit the properties that this occurs for, and should be set so that it matches the subset of Assessments/VG Numbers having GIS References supplied in the import file.
2. The GIS References in the import file nominated on the VG Number Update Control form will be loaded as Property GIS References.

Each GIS reference in the file will be loaded to the Primary Property for the first current Assessment that is associated with the VG Number supplied in the import file.

Import records having 'N/A' as the VG Number will be ignored. If the imported GIS Reference contains a period ('.') it will be reformatted by ignoring the period and the following characters before being loaded to Pathway.

Valuation Notice Extract

The Valuation Notice Extract functionality will only be available when the Valuation System Parameter 'Valuation Notices to be Published' is set on.

It will allow Council to fulfil the responsibility for printing Valuation Notices, if they wish. The Valuation Notice Extract process will create a CSV or fixed width export file that can be used by Word Mail Merge (or whatever tool Council uses) to print the notices.

Valuation Notice Extract Control form

Valuation Notice Extract Control

Search Profile

Search Method: **VG # Range** (dropdown)

VG # Range: [] - []

Description: [] (pop-up icon)

Effective Date: []

Import Date: []

DVR Status: [] (dropdown)

Processing Parameters

Update DVR Status: [] (dropdown)

Notice Date: []

File Export

Export Format: [] (dropdown)

Export File: [] (dropdown)

Options Process Cancel

Valuation Notice Extract Control form

Search Profile – Search Method

Click on the Drop Down Menu to choose a Search Method to qualify the Valuations for the Valuation Notice process.

Possible options are:

- VG Number Range
Only Valuations within the Range of Valuer Generals Numbers specified will be used
- Search System
Only Valuations that are included in the Query Result will be used.

Search Profile – VG # Range

Enter a Valuation Number range on which to base the search. These fields may be left blank to consider all records.

Search Profile – Description

Click on the Pop Up to select a Query Result on which to base the search.

Search Profile – Effective Date

Enter an Effective Date of the Valuations to be selected.

Search Profile – Import Date

Enter an Import Date of the Valuations to be selected.

Search Profile – DVR Status

Select from the select list a DVR Status of the Valuations to be selected. This field is mandatory. Valid choices are:

- Accepted
- Published
- Rejected
- Adopted

Processing Parameters – Update DVR Status

Select from the select list a DVR Status to update the selected Valuations to. This field is mandatory. Valid choices are:

- Published
- Adopted

Processing Parameters – Notice Date

Enter a Notice Date to be printed on the notices. This field is mandatory and must be equal to or later than today's date.

File Export – Export Format

Enter or select from the pop up an export format to use for the production of the notices. This field is mandatory.

File Export – Export File

Enter or select from the pop up a file location and name for the export file. This field is mandatory.

Reporting

The following topics are covered in this chapter:

[Rental Valuations Summary Report](#)

[Assessment Book Report](#)

[Valuations Report](#)

[Tenancy Information Schedules](#)

Rental Valuations Summary Report

Rental Valuations Summary Report Control Form

The screenshot shows a software window titled "Rental Valuations Summary Report Control". Inside the window, there are two input fields on the left: "Rating Period" with a green dropdown menu and a right-pointing arrow button, and "Valuation Year Used" with a small white text box. To the right of these fields is a large, empty white rectangular box. At the bottom right of the window, there are three buttons: "Options", "Process", and "Cancel".

Rental Valuations Summary Report Control Form

Rating Period

Select the Rating Period for the report to be run over from the pop up.

Valuation Year Used

This field is not maintainable and will be populated with the Valuation Year associated with the selected rating Period.

Assessment Book Report

Assessment Book Report Control Form

Assessment Book Report Control

Search Profile

Search Criteria: **Assessment Range**

Assessment Range: [] []

Query Result: [] %

New Rating Period: [] >> []

Valuation Year Used: []

Name Type: **Ratepayer**

Annual Value: ☒ Proposed ☐ Current ☐ Both

Options Process Cancel

Assessment Book Report Control Form

Search Criteria

Click on the drop-down to select the method of searching.

Assessment Range

Insert the assessment number range that the report is to run.

Query Result

Enables the process to be run utilising an Assessment Range or Query Result. The Query Result can utilise queries over the assessment file (LRAASSM).

New Rating Period

Select the new Rating Period from the pop up.

Valuation Year Used

This field is not maintainable and will be populated with the Valuation Year associated with the selected rating Period.

Name Type

Select from the drop down list either Property Owner or Ratepayer for this name to be printed on the report.

Annual Value

Select the status of the Annual Value to be processed. Valid choices are Current, Proposed or Both.

Valuations Report

Rental Assessment Report Control Form

Rental Assessment Report Control

Search Profile

Search Method: **Reference Number Range**

Reference Type: **DDB** » Debit Debit Application Number

Reference Range: [] - []

Query Result: []

Rating Period: [] »

Reference Type to be Printed: [] »

Options Process Cancel

Rental Assessment Report Control form

Search Method

Click on the drop-down to select the method of searching.

Reference Type

Select the Reference Type to use to restrict the report to running over only those assessments with this type.

Reference Range

To further restrict the assessments that the report is run over enter a Reference Range.

Query Result

This field may be used to specify a previously created query definition to identify a group of records. Alternatively, a query may be selected from the pop up.

Rating Period

Select the Rating Period for the report to be run over from the pop up.

Reference Type to be printed

Select the Reference Type to be printed from the pop up.

Valuation Audit Report

The Valuation Audit Report is used to report on changes to:

- a) the valuation values of a Valuer General Number
- b) the Non-Rateable status for an Assessment

Valuation Audit Report Control Form



Valuation Audit Report Control form

Search Profile – Valuation Year

This field allows the selection of a Valuation Year and is defaulted to the current Valuation Year.

Search Profile – Date Range

A date range can be entered to only report the changes that have taken place between the nominated dates (inclusive of those dates).

Search Profile – Remove From Audit

When checked on, the records will be removed from the audit so that they will not be reported on again. Only records matching the search criteria (including nominated Valuation Types) will be removed from the audit.

Valuation Types Button

Pressing this button presents the Valuation Type Maintenance form allowing the user to select the Valuation Types to be reported on.

Tenancy Information Schedules

Tenancy Information Schedules Control Form

Tenancy Information Schedules Control

Search Criteria

Search Method: **Reference Number Range**

Reference Type: [] >> []

Reference Range: [] - []

Ward: [] >> []

Number of Assessments per Page: []

Reference Type to be Printed: [] >> []

Options Process Cancel

Tenancy Information Schedules Control Form

Search Method

Click on the drop-down to select the method of searching.

Reference Type

Select the Reference Type to use to restrict the report to running over only those assessments with this type.

Reference Range

To further restrict the assessments that the report is run over enter a Reference Range.

Ward

Select the Ward that the report is to be over.

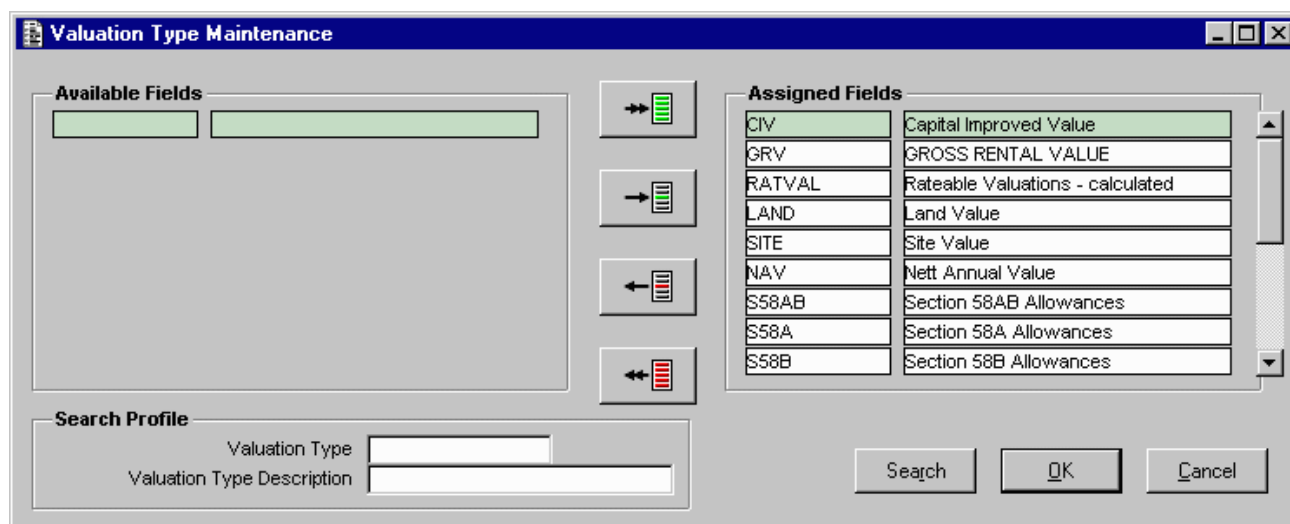
Number of Assessments per page

Enter the number of assessment to be printed per page.

Reference Type to be printed

Select the Reference Type to be printed from the pop up.

Valuation Type Select/Remove Form



The screenshot shows the 'Valuation Type Maintenance' window. It features two main lists: 'Available Fields' on the left and 'Assigned Fields' on the right. Between them are four buttons: 'Add' (right arrow), 'Remove' (left arrow), 'Select All' (right arrow with a list icon), and 'Remove All' (left arrow with a list icon). The 'Assigned Fields' list contains the following items:

Code	Description
CIV	Capital Improved Value
GRV	GROSS RENTAL VALUE
RATVAL	Rateable Valuations - calculated
LAND	Land Value
SITE	Site Value
NAV	Nett Annual Value
S58AB	Section 58AB Allowances
S58A	Section 58A Allowances
S58B	Section 58B Allowances

At the bottom left is a 'Search Profile' section with two input fields: 'Valuation Type' and 'Valuation Type Description'. At the bottom right are three buttons: 'Search', 'OK', and 'Cancel'.

Valuation Type Select/Remove Form

Available Fields

Will list Valuation Types not assigned and available to be assigned.

Assigned Fields

Lists the Valuation Types that the report will be run over in conjunction with the parameters used on the Control form.

Select Button

Press this button to move the highlighted Available Valuation and make it Assigned.

Remove Button

Press this button to move the highlighted Assigned Valuation Type and make it Available.

Select All Button

Press this button to select and make Assigned all available Valuation Types.

Remove All Button

Press this button to make Available all Assigned Valuation types.

Search Profile - Valuation Type

Enter part of the Valuation Type code to perform a search of matching Valuation Types.

Search Profile - Valuation Type Description

Enter part of the Valuation Type description to perform a search of matching Valuation Types.

Tenancy Values Maintenance Form

Tenancy Values Maintenance

Valuer General Number: 19777
 Tenancy Number: 0
 Year: 2000
 Effective Date: 01-Jul-1999
 Correction Number: 0

Valuation Type: GRV Value: 40,000 Adjusted Value:

Number	Assessment Number	Primary Location	Percentage	Valuation Type	Value	Adjusted Value	
	1976	0	353 Rating Boulevard, SUPPLEMENT	50.00000	GRV	20,000	0
1	1975	2	352 Rating Boulevard, SUPPLEMENT	50.00000	GRV	20,000	0

Buttons: Percentage, Tenancy, Calculate, Rateable Valuation, Insert, Continue, Quit

Tenancy Values Maintenance Form

Valuer General Number

This field contains a ten character Valuer General Number as provided by the Valuer General. This field is not maintainable on this form.

Tenancy Number

This field contains a four digit Valuer General Tenancy Number that is used to individually distinguish a strata unit related to the Valuer Generals number.

Year

The Year associated with the Valuation Value.

Valuation Type

This field contains the Valuation Type selected for the Valuation.

Value

This field contains the Valuation entered against the selected Valuation Type.

Adjusted Value

This field contains the adjusted value entered against the Valuation Type. Adjusted values are used to denote that a Postponed Value exists or simply to denote any other adjusted value exists for whatever reason.

If an Adjusted Valuation is present, then the Adjusted Valuation amount will be used in the Rates calculation process rather than the valuation amount.

Effective Date

This field contains the Date that the Valuation is to take effect from.

Correction Number

This field contains the Valuer General Correction Number that is used to designate the order in which changes occurred to Valuations within the one Valuation Year.

Tenancies – Number

This field contains a four digit Valuer General Tenancy Number that is used to individually distinguish a strata unit related to the Valuer General number. This field is not maintainable from this form.

Tenancies – Assessment Number

Assessment number that the Valuer General Tenancy is on.

Tenancies – Primary Location

This field contains the primary property address that you are maintaining the percentages for. This field cannot be maintained from this form.

Tenancies – Percentage

This field contains the percentage of the Valuation that applies to this Assessment. If there is only one Assessment linked to this Valuer General Number then the percentage will be 100%. If there are multiple Assessments linked to this Valuer General Number, then the percentages assigned to each of those Assessments must in Total add up to 100%.

Tenancies – Valuation Type

This field contains the Valuation Type attached to this assessment.

Tenancies –Value

This field contains the Value attached to the Value Type for this assessment.

Tenancies – Adjusted Value

This field contains the Rateable Value attached to the Rateable Value Type for this assessment.

Percentage Button

Tenancy Button

Calculate Button

Rateable Valuation Button

Press this button to generate Rateable Valuations for this Valuation.

Tenancy Percentage Maintenance Form

Tenancy Percentage Maintenance							
Valuer General Number		19777					
Tenancy Number		0					
Year		2000					
Effective Date		01-Jul-1999					
Correction Number		0					
				Valuation Type	Value	Adjusted Value	
				GRV	40,000		
Tenancies							
Number	Assessment Number	Primary Location	Percentage	Valuation Type	Value	Adjusted Value	
	1976	0	353 Rating Boulevard, SUPPLEMENTA	50.00000	GRV	20,000	0
1	1975	2	352 Rating Boulevard, SUPPLEMENTA	50.00000	GRV	20,000	0
<div> <input type="button" value="Value"/> <input type="button" value="Tenancy"/> <input type="button" value="Calculate"/> <input type="button" value="Rateable Valuation"/> <input type="button" value="Continue"/> <input type="button" value="Quit"/> </div>							

Tenancy Percentage Maintenance Form

Valuer General Number

This field contains a ten character Valuer General Number as provided by the Valuer General. This field is not maintainable on this form.

Tenancy Number

This field contains a four digit Valuer General Tenancy Number that is used to individually distinguish a strata unit related to the Valuer General number.

Year

The Year associated with the Valuation Value.

Valuation Type

This field contains the Valuation Type selected for the Valuation.

Value

This field contains the Valuation entered against the selected Valuation Type.

Adjusted Value

This field contains the adjusted value entered against the Valuation Type. Adjusted values are used to denote that a Postponed Value exists or simply to denote any other adjusted value exists for whatever reason.

If an Adjusted Valuation is present, then the Adjusted Valuation amount will be used in the Rates calculation process rather than the valuation amount.

Effective Date

This field contains the Date that the Valuation is to take effect from.

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Tenancies – Valuation Type

This field contains the Valuation Type attached to this assessment.

Tenancies –Value

This field contains the Value attached to the Value Type for this assessment.

Tenancies – Adjusted Value

This field contains the Rateable Value attached to the Rateable Value Type for this assessment.

Value Button**Tenancy Button****Calculate Button****Rateable Valuation Button**

Press this button to generate Rateable Valuations for this Valuation.

