LEE COUNTY VALUE ADJUSTMENT BOARD

PETITION ENTRY CLERK MANUAL

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I. BASIC INFORMATION ABOUT PETITION FORM DR-486

1. COMPLETED BY CLERK OF THE VALUE ADJUSTMENT BOARD (VAB)

- A Petition # Will be assigned by the Axia system after petition/payment is posted.
- **B** County Always "Lee". Clerk should fill this in before entering petition information into Axia.
- C <u>Tax Year</u>: Clerk should fill this in <u>before</u> entering petition information into Axia.
- **D** <u>Date Received</u>: Complete and initial <u>after</u> processing is complete and there are no problems with the petition.

2. PART 1. Taxpayer Information - ** indicates required information

- A ** <u>Taxpayer name</u>: The <u>property owner's</u> name.
- **Agent**: To be completed if petition is filed by <u>anyone</u> other than the property owner. See NOTES on page 4 for additional information on agent filing.
- **C** ** Mailing address for notices: If an agent is filing, this should be the agent's full mailing address.
- D ** Parcel ID and physical address or TPP account #: Parcel ID for Real Property is 17 digits long.

 TPP account # usually begins with two letters (for instance, BB), and is 10 digits long.
- **E** ** **Phone and fax**: At least one valid telephone number should be provided.
- **F Email address**: Be sure to enter accurately just as provided by the petitioner.
- **G** Petitioner preference for receiving information: Some notices will be emailed if email is checked. If no boxes are checked, preference will be "US Mail".
- H Send a copy of the real property record card or tangible property worksheet. If this is checked, the appropriate card or worksheet will be mailed with the hearing notice.
- I "<u>Will not attend hearing</u>" If this is <u>not checked</u>, and the petitioner <u>does not appear</u> for the scheduled hearing, the <u>petition will be denied</u> in accordance with DOR rules.
- **J** ** Type of property: Only one should be checked.

3. PART 2. Reason for Petition - ** indicates required information

- A ** Only one box should be checked. If more than one is checked, another petition is needed. (See Section III.B.)
- **B** Exemption type must be entered if "*Denial of exemption*" is checked.
- C If "Tangible personal property value" is checked, entry in 2.D must be 10-digit TPP Account #.
- **D** "Check here if this is a joint petition" If this box is checked, refer to "joint petitions" requirements on page 26.
- E "Enter the time you think you need" If left blank by the petitioner, the entry is "15 mins"
- F "There are specific dates ..." If box is checked, a list of dates must be attached.

4. PART 3. Certification

- A <u>Signature, taxpayer</u> Taxpayer must sign if there is no agent, or if there is no entry in **4.D** and no letter of authorization from the taxpayer.
- B ** The taxpayer or agent name should be printed clearly, and the petition must be dated.
- C <u>If signed by "agent" (and not Taxpayer)</u>, there must be a Professional license number in **4.D**, or a letter of authorization from the taxpayer must accompany the petition.
- **D** <u>Professional license number</u> If an agent has signed in **4.C**, this field may be completed.
- E <u>If petition is being filed after the statutory deadline</u> (varies for different types of petitions), this box must be checked and a **statement of reasons for late filing** must accompany petition.



PETITION TO THE VALUE ADJUSTMENT BOARD REQUEST FOR HEARING

Print Form

DR-486 R. 12/09

Rule 12D-16.002 Fiorida Administrative Code

You have the right to an informal conference with the property appraiser. This conference is not required and does not change your filing due date. You can present facts that support your claim and the property appraiser can present facts that support the correctness of the assessment. To request a conference, contact your county property appraiser.

For portability of homestead assessment difference, use form DR-486PORT, For deferral or penalties, use DR-486DP.

		DR-460FORT. For deterral or penalties, use DR-460DF.		
וה		ALUE ADJUSTMENT BOARD (VAB)		
	Petition # (A) County (B)	C Tax Year Date received D		
_ '	COMPLETED BY	THE PETITIONER		
	PART 1. Taxpayer Information			
_	Taxpayer name (A)	Agent B		
	Mailing	Parcel ID and		
	address C	physical address		
ŀ	for notices	or TPP account #		
Ţ	Phone E Fax	Email F		
İ	The standard way to receive information is by US mail. If possi	ble, I prefer to receive information by Email Fax		
	Send me a copy of the real property record card or tangible	property worksheet with my hearing notice.		
	I will not attend the hearing but would like my evidence con	sidered. In this instance only, you must submit duplicate copie		
)		a law allows the property appraiser to cross examine or object to		
	your evidence. The VAB special magistrate ruling will occur			
	Type of property: Res. 1-4 units Industrial and miscellaneou			
٦.		e Vacant lots and acreage Business machinery, equipmen		
J	PART 2. Reason for Petition Check one. If more than or			
	Real property value Denial of exemption. Select			
	Denial of classification Denial for late filing of exemption or classification. Include a date stamped copy of applica			
	Parent/grandparent reduction Tangible personal property val	lue. A return required by s. 193.052 must have been filed. (S. 194.034, F.S		
	Check here if this is a joint petition. Attach a list of parcels substantially similar. (S. 194.011(3)(e) and (f), F.S.)	with property appraiser's determination that parcels are		
		ase. Most hearings take 15 minutes. The VAB is not bound by tiple parcels, provide the time needed for the entire group.		
)	There are specific dates I or my witnesses will not be avail.	able to attend. I have attached a list of the dates.		
- 1	You have the right to exchange evidence with the property appraiser. To initi			
-	appraiser at least 15 days before the hearing and request the property appra PART 3. Certification	iser's evidence. At the hearing, you have the right to have witnesses swor		
1	PART 3. Certification Under penalties of perjury, I declare that I am the owner of the	property described in this potition as the authorized seest of		
	onder penalties of perjury, I declare that I am the owner of the the owner for purposes of filing this petition and for purposes of I			
	F.S., and that I have read this petition and the facts stated in it			
C		В		
	Signature, taxpayer	Print name Date		
		(b)		
	Signature, agent	Professional license number or FBN		
		e taxpayer or include written authorization from the taxpayer.		
	 I am filing this petition after the petition deadline. I have at documents that support my statement. 	tached a statement of the reasons I filed late and any		
-	Your petition will not be complete until you pay the filing fee. V	When the VAB has reviewed and accepted it, they will assign a		
	number, send you a confirmation, and give a copy to the prope			

II. VERIFY INFORMATION ON CHECK USED FOR PAYMENT

(If payment is made in cash, go directly to III on page 4).

The VAB reserves the right to reject "starter" checks, third-party checks, bank "counter" checks and any other form of payment not in accordance with sound business practice.

1. CHECK OR MONEY ORDER REQUIREMENTS

- **a.** Date must be current date or no more than 60 days prior to current date.
- **b.** Check/Money Order must be made payable to "Clerk of Courts", "Clerk of Circuit Courts", "Lee County Clerk of Courts", or "Lee County Value Adjustment Board". If mailed check is payable to the wrong party, give the check/petition to the Lead VAB Clerk or Office Manager for further action.
- **c.** Numeric amount and written amount must match. See chart below for the required amounts for various types of transactions.
- d. The Check/Money Order must be signed.



2. FEE CHART

As petitions are entered, Axia will automatically calculate the fees due.

Except for the simplest transaction (1 petition, 1 parcel), it is best to wait until all petitions and parcels are entered before entering the payment information.

	#	#	Base		
Transaction Type	Petitions	Parcels	Fee	Plus	Total
Single Petition Type, Single Parcel	1	1	15.00	0.00	15.00
Single Petition, Two Contiguous Parcels	1	2	15.00	10.00	25.00
Two Petitions, One Parcel Each	2	2	30.00	0.00	30.00
Single Petition, Three Contiguous Parcels	1	3	15.00	15.00	30.00
Single Petition, Two Petition Types	2	1	15.00	Waive Fee	15.00
Single Petition, Multiple Contiguous					15.00 +
Parcels or Condo Units (see pg 25)	1	n	15.00	(n x \$5.00)	(n x \$5.00)

III. ENTER PETITION INFORMATION

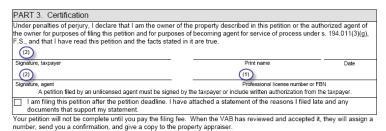
A. PETITION ENTRY BASICS

1. IMPORTANT NOTES BEFORE YOU BEGIN TO ENTER A TRANSACTION:

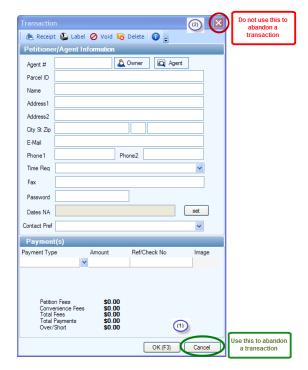
- a. If there are any problems with a petition or check, please complete a Form PFI, attach it to the front of the petition paperwork, and give it to the Lead VAB Clerk or Office Manager immediately for corrective action.
- b. If an agent is filing the petition, verify that at least one of the following is true:
 - (1) A Professional License Number or Florida Bar Number (FBN) has been provided, or
 - (2) The taxpayer and the agent have **both** signed the petition, or
 - (3) A letter of authorization from the taxpayer is attached to the petition.

If none of these conditions is met, do not process the petition.

Give the petition and paperwork (with a completed Form PFI) to the Lead VAB Clerk or Office Manager



- c. If you must "abandon" the transaction entry before entering payment information
 - (1) Use the "Cancel" button at the bottom of the "Petitioner/Agent/Payments" window.
 - (2) Do not use the "X" at the top of the window.



d. If you discover a problem after entering payment information, do not navigate away from the payment screen.
 Ask the Minutes Manager or Lead VAB Clerk for help.

2. LAUNCHING AXIA

Each clerk who is responsible for entering petition data will be provided with information needed to access the system.

3. "AXIA TOOL BAR" WITH DROPDOWN MENUS - LOCATED ON THE AXIA "MAIN PAGE"

- a. Only the "File" menu is used for petition entry, except for "Agent Upload" transactions. (See Section E)
- b. The "Close Out" Menu will be used daily to reconcile individual clerk transactions.



4. BEGINNING A "NEW TRANSACTION"

Instructions on pages 5-17 apply to all petitions.

After the initial petition or parcel has been entered, additional instructions will be provided for:

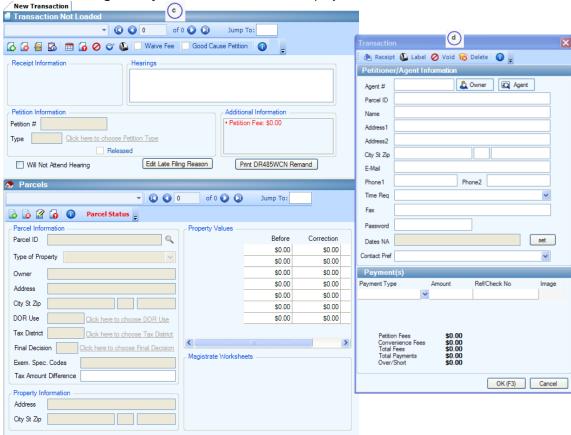
Petitions for a single parcel with more than one "Reason for Petition" (Petition Type) - (pgs 18-21), Multiple petitions in one transaction (all paid for with one check) - (pgs 22-25),

Single petition with multiple condo units or contiguous vacant parcels - (pgs 26-32).

- a. Click on "File".
- b. Select "New Transaction".



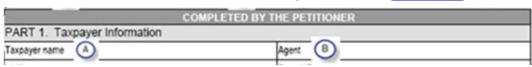
- c. The "Main Transaction" window will appear with a status of "Transaction Not Loaded".
- d. The "Petitioner/Agent/Payments" window will be displayed.



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5. ENTRIES INTO THE "PETITIONER/AGENT/PAYMENTS" WINDOW

Basic information is taken from PART 1 of the petition form. (See page 2)



a. If an agent is filing the petition, enter the "Agent #" (if provided) or use Agent Lookup to obtain Agent information. If an agent is not filing, go to Section 5.b. on page 7.
 (Do not enter a parcel number in the "Petitioner/Agent/Payments" window if an agent is filing.)

To perform Agent Lookup:

(1) Click on the "Agent" lookup icon Agent



(2) Enter all or part of the Agent's name. (3) Select search criteria. (4) Click on "Search"



If the Agent name is not in the list, click "**OK**" in the "**No Records Found**" dialog box, close the "**Search Agent**" panel, and **go to Section 6.a. on page 9**,



(5) From the "Search Agent" dropdown list, locate the correct Agent and double-click the row.



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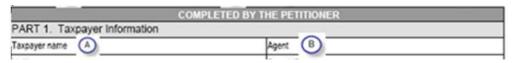
(6) You will be returned to the "Petitioner/Agent/Payments" window with basic Agent information completed.

Go to page 9 for instructions on completing the petitioner and payment information.



b. If the taxpayer is filing his/her own petition (no agent). Return

Return to page 6 Return to page 18



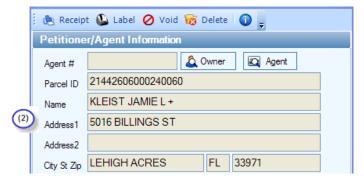
(1) Type in the "Parcel ID" (numbers and letters only, no dashes or dots), and hit the "Enter" key.



(2) If Parcel ID is correct, name/address information from the Property Appraiser's database will auto-populate.

Go to page 9 for instructions on completing the petitioner and payment information.

If the Parcel ID is not provided or is not correct, go to Step "c." below.

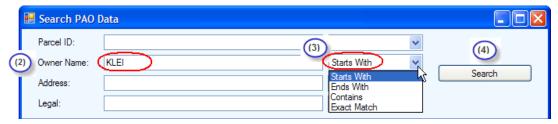


- c. If Parcel ID is not provided or is not correct, use the Owner Lookup to find the correct parcel.
 - (1) Click on the "Owner" lookup icon

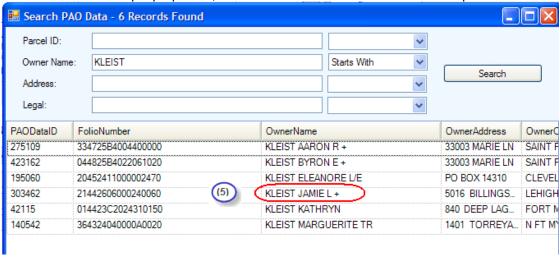


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- (2) Enter all or part of the Owner's name.
- (3) Select search criteria.
- (4) Select "Search".



(5) From the "Search PAO Data" dropdown list, locate the correct "OwnerName" and double-click the row. If the Owner has multiple properties, use the address to determine the correct parcel.



(6) You will be returned to the "Petitioner/Agent/Payments" window with basic owner information from the Property Appraiser's database completed. Go to page 9 for instructions on completing the Petitioner and payment information.

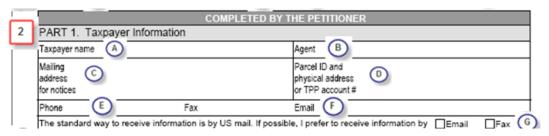


d. If neither Parcel ID entry nor Owner Lookup returns correct petitioner information, please check with the Lead VAB Clerk or Office Manager. The parcel may be classified as "Confidential" in the Property Appraiser's database, and the petition will require special treatment.

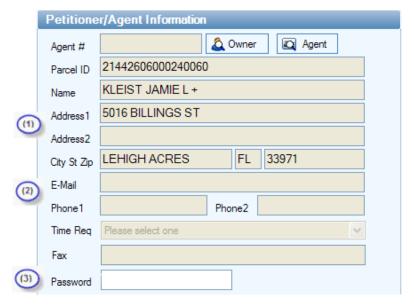
Return to Table of Contents Return to page 6 Return to page 7 Return to page 22

6. COMPLETING INFORMATION IN THE "PETITIONER/AGENT/PAYMENTS" WINDOW

a. Completing Petitioner Information



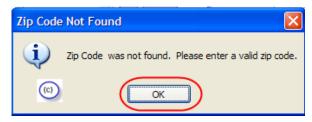
- (1) Verify that the address shown is the correct mailing address as shown on the petition cells ; edit if necessary. See (4) below for information about addresses outside the United States.
- (2) Verify or add phone, fax email information (as provided on petition).
- (3) The "Password" will be automatically assigned when payment information is complete.



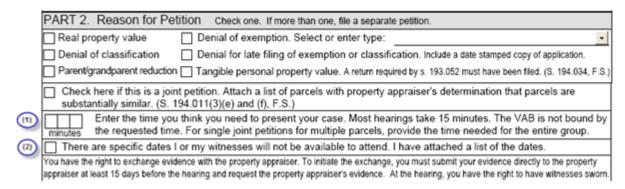
- (4) For International addresses only:
 - (a) The Province and postal code information should be entered in the "Address2" line.
 - (b) The country name should be entered in the "City St Zip" line.

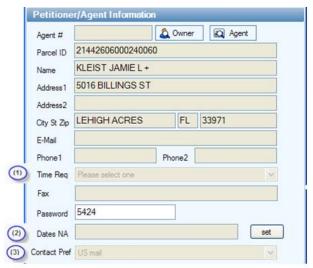


(c) In the "Zip Code Not Found" dialog box, select "OK" to close the dialog box and continue the entry process.



(1) Use the drop-down list to select the "Time Needed to Present Petition" (e.g., 15 mins). If no time is provided, select "15 mins".





- (2) If the petition includes a list of unavailable dates:
 - (a) Click on "Set" on the "Dates NA" line. The "Dates Not Available" calendar window will appear.



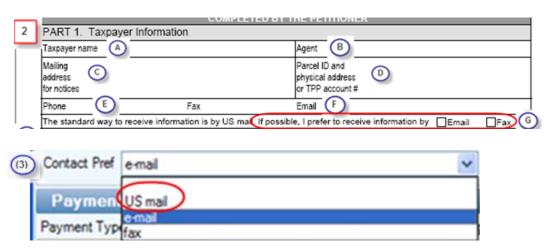
- **(b)** Hold down the "Ctrl" key while selecting the desired dates on the calendar. It is not necessary to enter Saturdays or Sundays.
- **(c)** The highlighted dates will appear in the box below the calendar.



- (d) When all appropriate dates are highlighted, click "OK" to return to the "Petitioner/Agent/Payments" window. Return to Table of Contents
 - (e) The selected dates will be displayed in the "Dates NA" box.



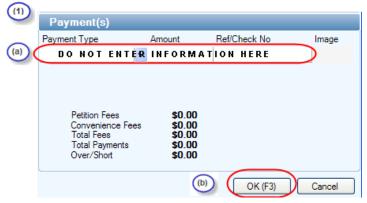
(3) Select the petitioner "Contact Pref" from the dropdown list. Select "US mail" if no boxes are checked.



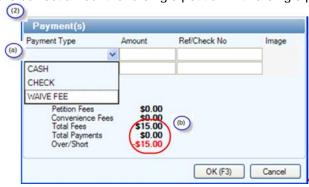
c. Entering Payment Information

- (1) If the petition you are entering is **NOT** a single petition with one parcel and one "Reason for Petition" (Petition Type):
 - (a) DO NOT ENTER payment information at this time.
 - (b) Click on "OK (F3)" to be returned to the "Main Transaction" window and refer to the page(s) indicated below for additional instructions.

Petitions for a single parcel with more than one "Reason for Petition" (Petition Type) go to page 18 Multiple petitions in one transaction (all paid for with one check), go to page 22 Single petition with multiple condo units or contiguous vacant parcels, go to page 26.



- (2) If this is a single petition with a single parcel and only one Reason for Petition (Petition Type):
 - (a) From the "Payment Type" dropdown list, select "CASH", "CHECK", or "WAIVE FEE" (NOTE: "WAIVE FEE" is only used for some Denials of Homestead Exemption Applications, for a Portability petition where the new homestead is in a different county and Lee County is the county where the previous homestead was located, for the denial of a tax deferral, for a petition filed by a taxpayer who demonstrates at the time of filing, by an appropriate certificate or other documentation issued by the Department of Children and Family Services and submitted with the petition, that the petitioner is then an eligible recipient of temporary assistance under Chapter 414, Florida Statutes, or for an additional petition for the same parcel. Please see the Lead VAB Clerk or Office Manager if there is any question about waiving the fee.)
 - **(b)** The amount "\$15.00" will be automatically inserted if "CASH" or "CHECK" is selected. This is the correct amount for a single petition with a single parcel number.



- (c) Enter the check or money order number, if applicable, in the "Ref/Check No" box.
- (d) Verify that "Total Fees" and "Total Payments" are equal.
- (e) Verify that "Over/Short" is \$0.00

NOTE: If there is a problem at this point, contact the Lead VAB Clerk or Office Manager.

<u>DO NOT ATTEMPT TO CANCEL THE TRANSACTION OR NAVIGATE AWAY FROM THE PAYMENTS WINDOW.</u>

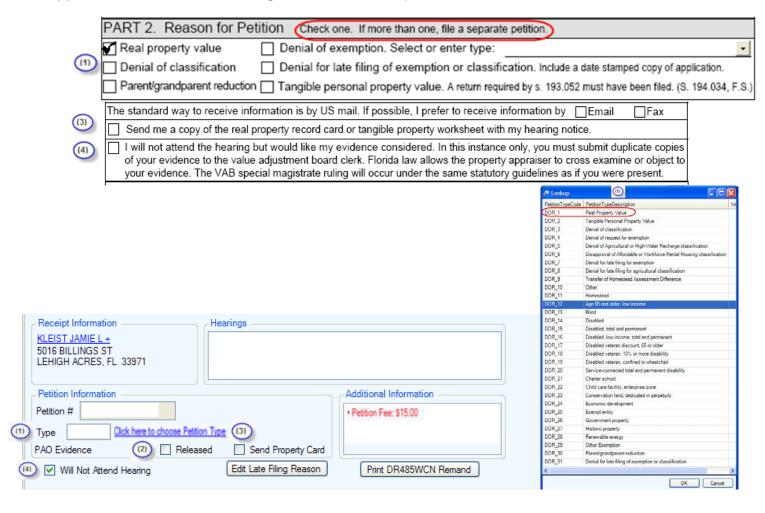
- (f) Ignore the "Scan" link that appears when "CHECK" is selected. Lee County does not scan check images.
- (g) Select "OK (F3)" to return to the "Main Transaction" window.



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7. COMPLETING INFORMATION IN THE "Main Transaction" WINDOW

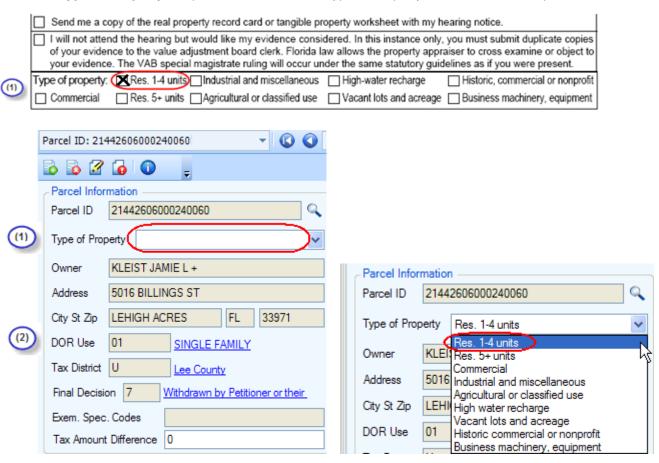
- a. Enter Petition Information
 - (1) From the "Type" dropdown list, select the correct "Petition Type" (Reason for Petition):
 - (2) Leave the PAO Evidence "Released" box unchecked
 - (3) Check "Send Property Card" if box is checked on petition:
 - (4) Check "Will Not Attend Hearing" if box is checked on petition.



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b. Enter Parcel Information

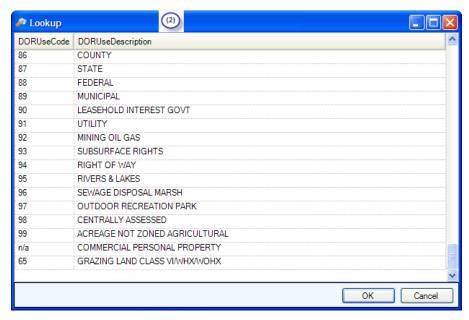
(1) From the "Type of Property" dropdown list, select the "Type of Property" as checked on the petition.



(2) The "DOR Use" field should be either a number from 01 thru 99 or blank. If this field contains a capital letter, there is a problem with the parcel; and the petition should be referred to the Lead VAB Clerk or Office Manager immediately.

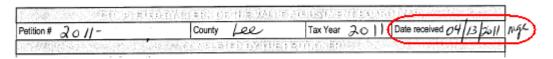


This field should only be blank if Petition Type is Tangible Personal Property Value (DOR_2), and should be corrected to "n/a"



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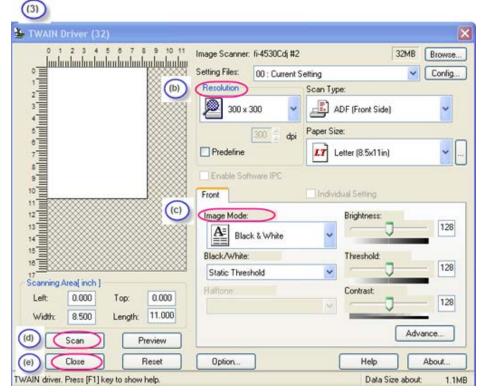
- a. Scan the petition form (NOTE: Any letter of authorization will be scanned as a separate "LOA" image.)
 - (1) Complete the clerk's entries at the top of the Petition Form (see pages 1 & 2), and put your initials next to the date.



- (2) Be sure that the image selection is "Petition".
- (3) When scanning for the first time into an Axia file, uncheck the "(Quick)" box.
 - (a) Place documents in the scanner, and select "Scan"



- (b) From the "Resolution" dropdown list, select "300 x 300".
- (c) From the "Image Mode" dropdown list, select "Black & White" (for petitions and most other images).



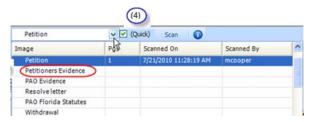
- (d) Select "Scan" to scan the document.
- (e) Select "Close" to complete the image transfer.

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(4) After the first document has been scanned, re-check the "(Quick)" box.

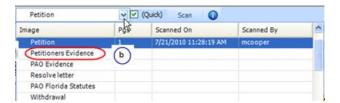
The "Resolution" and "Image Mode" settings will be retained.

You may uncheck the box to temporarily change settings for special scanning needs.



b. Scan additional images, including LOA

If there are additional documents to be scanned, select the appropriate "Image" type from the dropdown list and repeat Steps (3)(a), (3)(d), and (3)(e) on page 15.



c. Post the Transaction

After all data has been entered and the petition form and other paperwork (if applicable) have been scanned:

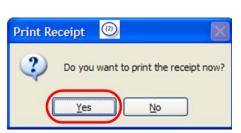
(1) On the "Petition Transaction" Tool Bar, select the "Post Transaction" icon

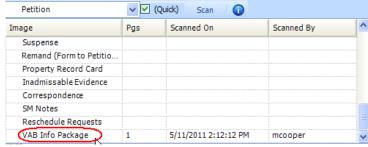


(2) When the "Print Receipt" dialog box appears, select "Yes" to print the receipt.

(At this time, there is no option to email the receipt.)

Note: Beginning in 2011, Axia provides the capability to automatically print with the receipt any information that has been scanned or uploaded into the "VAB Info Package" image. It has not yet been determined whether this feature will be utilized.



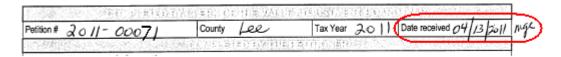


Return to Table of Contents Return to page 21 Return to page 25 Return to page 32

(3) The "Petition #" is assigned by Axia and displayed in the "Main Transaction" window.



- d. Complete the petition filing process.
 - (1) Write the "Petition #" in the appropriate space on the original petition form.



- (2) Distribute paperwork: ***
 - **a**. Make a copy of the petition to send to the PAO.
 - **b**. Any additional materials submitted by the petitioner should be scanned into the appropriate image type in the petition record and sent to the PAO with the petition copy.
 - **c.** Return the original petition with the receipt to the petitioner, along with appropriate VAB informational materials (Petitioner Information sheet, etc.)
- (3) Put checks/cash in the appropriate safe place (cash drawer, cash bag) as assigned.
- (4) Close the posted transaction before beginning the next transaction.



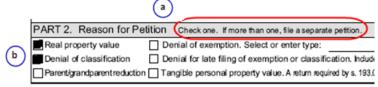
Return to Table of Contents Return to page 5 Return to page 11 Return to page 21 Return to page 25 Return to page 32

B. ENTERING PETITIONS FOR A SINGLE PARCEL WITH MULTIPLE PETITION TYPES

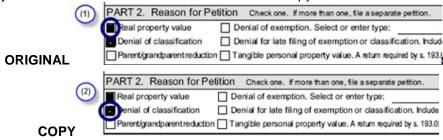
1. PREPARE APPROPRIATE PAPERWORK:

When a petitioner wishes to file petitions for multiple petition types (Reason for Petition) on a single parcel:

- a. A separate petition form should be submitted for each "Reason for Petition". If two separate petition forms have been submitted, go to Step 2.
- b. If only one petition form is submitted with multiple boxes checked, multiple petition forms must be created.

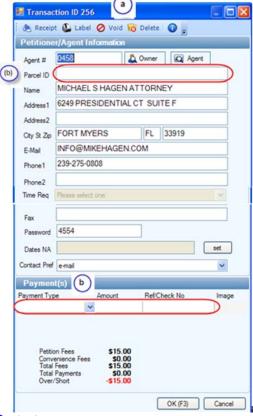


- **c.** Make a copy of the original petition.
 - (1) Circle one "Reason for Petition" on the original petition, and
 - (2) Circle the other "Reason for Petition" on the copy.



2. ENTER INFORMATION FOR THE FIRST PETITION TYPE

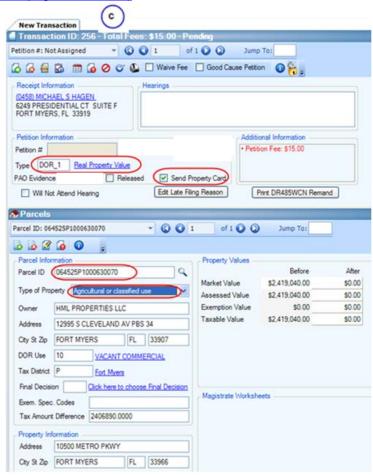
- a. Enter basic information in "Petitioner/Agent/Payments" window:
 - (1) If the taxpayer is filing the petition, refer to Section A.5.b on page 7
 - (2) If an Agent is filing the petition:
 - (a) Refer to <u>Section A.5.a on page 6</u> to enter the information for the first petition into the "Petitioner/Agent/Payments" window and
 - (b) Leave the "Parcel ID" line blank. ,
- b. DO NOT ENTER PAYMENT INFORMATION AT THIS TIME.



Return to Table of Contents

d. Enter Information for the first (Real Property Value) petition in the "Main Transaction" window.

(See pages 13 thru 14)



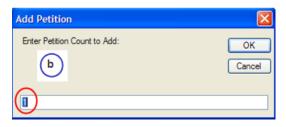
d. Scan the first petition form. (See page 15)

3. ENTER INFORMATION FOR ADDITIONAL PETITION TYPE

a. Click on the "Add Petition" icon



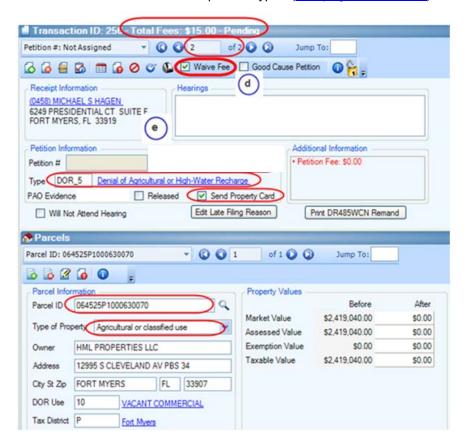
b. In the "Add Petition" dialog box, enter "1", then select "OK".



c. An updated "Main Transaction" window will appear indicating "Total Fees \$30.00 - Pending" and "Petition 2 of 2".



- d. Check the "Waive Fee" box. The "Total Fees" line will change to "\$15.00 Pending".
- Enter information for the second petition type. (See pages 13 thru 14.)

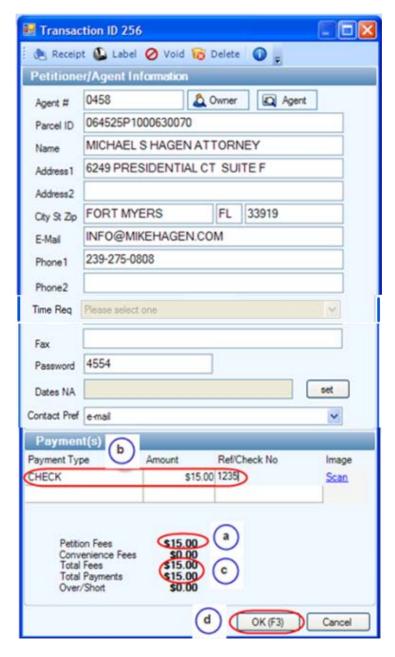


f. After all information for both petitions is entered, and both petition forms have been scanned: Select the link in the "Receipt Information" box to return to the "Petitioner/Agent/Payments" window.



4. COMPLETE PAYMENT INFORMATION

- a. Because the fee was waived on all but the first petition, the "Total Fees" value is only "\$15.00".
- **b.** Enter the payment information.
- c. Verify totals.
- d. Select "OK(F3)" to return to the "Main Transaction" window.



4. FINAL STEPS

- a. Post the Transaction (See Page 16.)
- b. Comlete the Filing Process (See Page 17.)

Return to Table of Contents Return to page 5 Return to page 11

C. ENTERING MULTIPLE PETITIONS IN ONE TRANSACTION

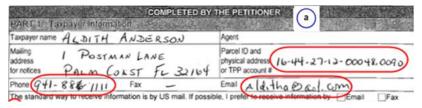
When a petitioner submits a single check or single cash payment for two or more petitions, all of the petitions must be entered in one single transaction.

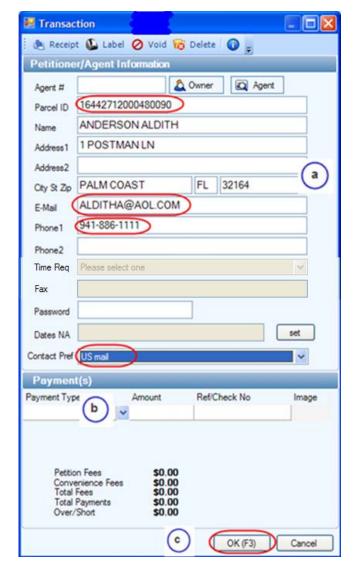
Note: If an agent has submitted a list of parcel numbers suitable for "Agent Upload", refer to Section E.

1. ENTER INFORMATION FOR THE FIRST PETITION

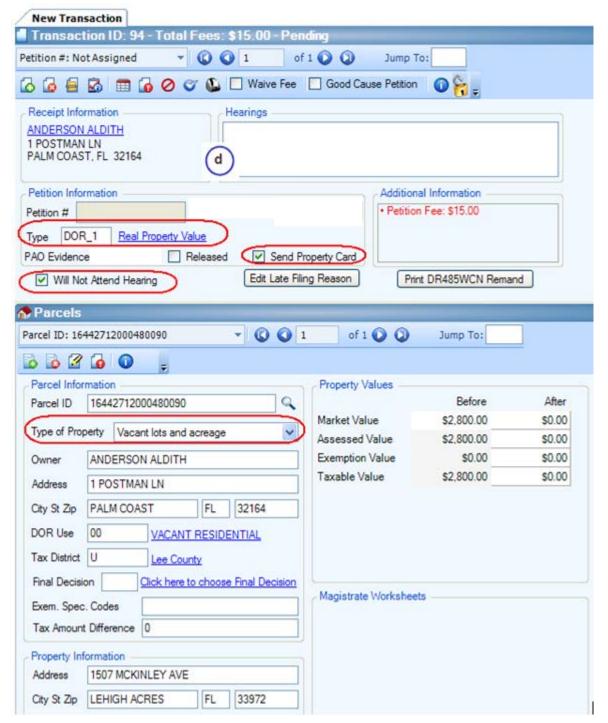
a. Enter basic information in "Petitioner/Agent/Payments" window:
If an Agent is filing the petition, refer to <u>Section A.5.a on page 6</u> to enter the information for the first petition into the "Petitioner/Agent/Payments" window and leave the "Parcel ID" line blank.
If the taxpayer is filing the petition, refer to <u>Section A.5.b on page 7</u>

- b. DO NOT ENTER PAYMENT INFORMATION AT THIS TIME.
- c. Select "OK(F3)" to return to the "Main Transaction" window.





d. Enter appropriate information for the first petition in the "Main Transaction" window. (See pages 13 thru 14.)



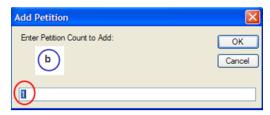
e. Scan the first petition form. (See page 15.)

2. ENTER INFORMATION FOR THE ADDITIONAL PETITIONS

a. Click on the "Add Petition" icon



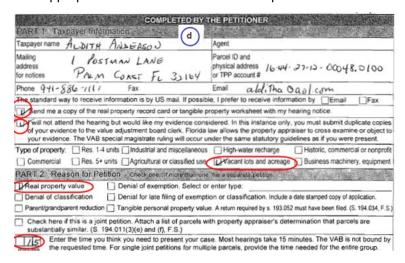
b. In the "Add Petition" dialog box, enter the number of petitions to be added, then select "OK".

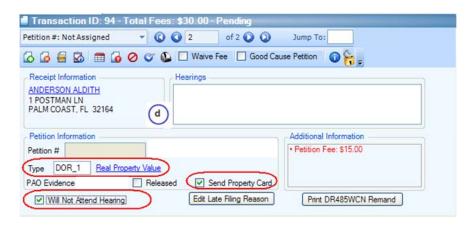


c. An updated "Main Transaction" window will appear indicating "Total Fees \$30.00 - Pending" and "Petition 2 of 2". (or "Total Fees" equal to \$15.00 times the total number of petitions (n) and "Petition 2 of n")



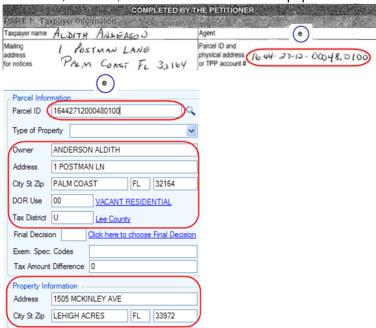
d. Enter appropriate information for the second petition in the "Main Transaction" window. (See pages 13 thru 14.)



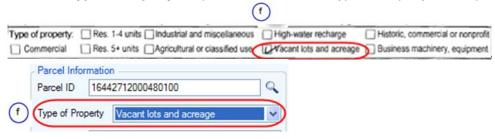


e. In the "Parcel Information" panel, enter the "Parcel ID" for the second petition.

The name, address, and other data should auto-populate.



f. From the "Type of Property" dropdown list, select the Type of Property for this petition/parcel.



- g. Scan the second petition form. (See page 15.)
- h. If there are additional petitions to add to the transaction, use the arrows to access each petition record and repeat Steps 2.d. thru 2.g. until all petitions for the transaction have been entered.

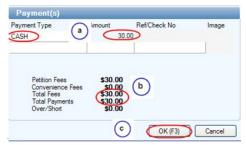


Click on the link in the "Receipt Information" panel to return to the "Petitioner/Agent/Payments" window



3. COMPLETE PAYMENT INFORMATION

- a. Enter payment information.
- b. Verify that "Total Fees" are equal to "Total Payments".
- c. Select "OK(F3)" to return to the "Main Transaction" window.



- 4. FINAL STEPS
 - a. Post the Transaction (See Page 16.)
 - Comlete the Filing Process (See Page 17.)
 Return to Table of Contents Return to page 5 Return to page 11

D. ENTERING A SINGLE PETITION WITH MULTIPLE "CONTIGUOUS" PARCELSNote: If an agent has submitted a list of parcel numbers suitable for "Agent Upload", refer to Section E.

1. INFORMATION REGARDING "SINGLE JOINT PETITIONS"

Some petitions are filed for multiple, contiguous undeveloped parcels, or for all units within a particular condominium association.

Any petitioner claiming "contiguous" parcel fees must have a letter from the Property Appraiser confirming that all vacant parcels or condo units on the petitioner's list are contiguous (Form DR-486MU).

In addition, an agent filing on behalf of a condominium association must provide a copy of the board of administration or directors' resolution authorizing the filing of the petition.

Check with the Lead VAB Clerk or Office Manager if there is any question as to whether all listed parcels can be submitted on one petition.

- a. Sample Petition
 - (1) Agent name
 - (2) References to attached parcel list
 - (3) Type of Property: Cannot be "Business machinery, equipment" (Tangible personal property).
 - (4) Reason for petition: Cannot be "Tangible personal property value".

	COMPLETED BY T	HE PETITIONER
	PART 1. Taxpayer Information (1)	THE STATE OF THE S
	Taxpayername RMC Florida Group LTD	Agent Henderson Flanklin etal (#)
	Mailing 1715 Monroe St	Parcel ID and physical address or TPP account #
	Phone 239-344-1195 Fax	Email
	The standard way to receive information is by US mail. If possible	e, I prefer to receive information by Email Fax
	Send me a copy of the real property record card or tangible pro	operty worksheet with my hearing notice.
	I will not attend the hearing but would like my evidence consider of your evidence to the value adjustment board clerk. Florida la your evidence. The VAB special magistrate ruling will occur und	w allows the property appraiser to cross examine or object to
((3)	Type of property: Res. 1-4 units Industrial and miscellaneous	High-water recharge Historic, commercial or nonprofit
	☐ Commercial ☐ Res. 5+ units ☐ Agricultural or classified use	Vacant lots and acreage Business machinery, equipment
	PART 2. Reason for Petition Check one. If more than one.	file a separate petition.
(4)	Real property value Denial of exemption. Select or e	enter type:
	Denial of classification Denial for late filing of exemption	n or classification. Include a date stamped copy of application.
	Parent/grandparent reduction Tangible personal property value.	A return required by s. 193.052 must have been filed. (S. 194.034, F.S.)
(2)	Check here if this is a joint petition. Attach a list of parcels with substantially similar. (S. 194.011(3)(e) and (f), F.S.)	h property appraiser's determination that parcels are
		e. Most hearings take 15 minutes. The VAB is not bound by e parcels, provide the time needed for the entire group.
	There are specific dates I or my witnesses will not be available	e to attend. I have attached a list of the dates.

b. List of Parcels for this Petition (See next page for completed form DR-486MU)

Parcel ID	Taxpayer Name	Agent Name
28462601000000120	RMC FLORIDA GROUP LTD	Henderson Franklin Starnes & Holt PA
28462601000000130	RMC FLORIDA GROUP LTD	Henderson Franklin Starnes & Holt PA
28462601000000140	RMC FLORIDA GROUP LTD	Henderson Franklin Starnes & Holt PA
28462601000000150	RMC FLORIDA GROUP LTD	Henderson Franklin Starnes & Holt PA
28462601000000160	RMC FLORIDA GROUP LTD	Henderson Franklin Starnes & Holt PA

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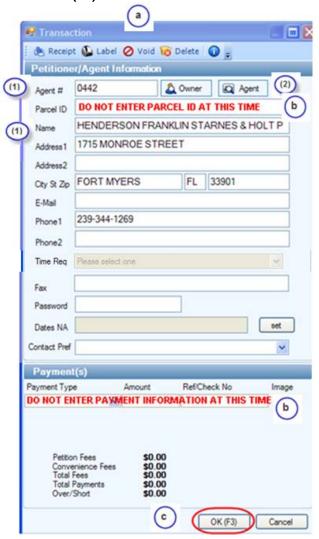
c. Completed DR-486MU

- (1) Statutory reference to requirement for documentation from agent filing on behalf of condo association.
- (2) First 13 digits of 17-digit parcel numbers for parcels to be petitioned.
- (3) Listing of the last 4 digits of each parcel number in the group.
- (4) Parcel count for page 1
- (5) Verify total number of pages submitted before beginning to enter petition information.
- (6) Verify total number of parcels submitted on all pages before beginning to enter petition information.
- (7) Verify that someone in the Property Appraiser's Office has signed and dated the certification.

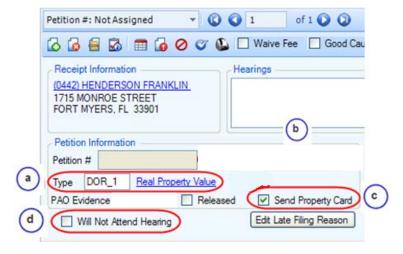
DEPARTMENT OF REVENUE	TTACHMENT TO	OJUSTMENT BO O SINGLE JOII TPLE UNITS F	NT PETITION	
Each petition with any attachme property being appealed must b DR-486, when used.			Phone t will be invalid and rejected. Ea	N. 12/6 Suggested for ach parcel of led to a Form action g this filing.
	ttach a copy of the board	of administration or	tions as agents according to sed directors' resolution authorizing	
Name	ForC	Address		
Mail notices to owner	agent			
Name Henderson Franklin S	tarnes & Holt PA		Home phone	
Address 1715 Monroe Street City Fort Myers	State F	Apt L Zip 33901	Work phone 239-344-11	95
			(4)	
Grand total, number of parcels f	Signatures	(5)		his one
Under penalties of perjury, I dec this attachment and the related			ertify that I am duly authorized	
Agent Signature Signature, petitioner/agent		D	ite	
Attached or indicated below is the p 194 011(3)(e) or (3)(f), F.S.	roperty appraiser's determin	nation that the parcels	are substantially similar as required	by s.
The parcels on this form are substa	ntially similar as required by	s. 194.011(3)(e) or (3)	(f), F.S.	
PAO Analyst signature		Must be da	ted	

2. ENTER PETITIONER/AGENT INFORMATION

- a. Open a "New Transaction" (see page 5) and
 - (1) Enter the Petitioner Information or the Agent Number, or
 - (2) Use the "Agent lookup" icon in the "Petitioner/Agent/Payments" window to find the agent (See page 6.) You will be returned to the "Petitioner/Agent/Payments" window to complete agent contact information.
- b. DO NOT ENTER A PARCEL ID OR ANY PAYMENT INFORMATION AT THIS TIME.
- c. Select "OK(F3)" to return to the "Main Transaction" window.



3. ENTER INFORMATION FOR THE PETITION - (See Pages 13 thru 14.)



4. ENTER INFORMATION FOR THE PARCELS

- If more than 10 parcels are listed, go to "Process Parcels" on page 30.
- **b.** Otherwise, enter Information for the first parcel:
 - (1) Enter the first listed parcel number in the "Parcel ID" line.
 - (2) From the "Type of Property" dropdown list, select the appropriate "Type of Property".



- c. Enter information for the remaining parcels
 - (1). Select the "Add Parcels" icon
 - (2) In the "Add Parcels" dialog box, enter the number of parcels to add and click "OK"



(3) Enter "Parcel ID" and select "Type of Property" for the 2nd parcel.



- (4) Use the "arrow" to move to each of the next parcel records, and
 - (a). Enter the corresponding parcel number from the list into the "Parcel ID" line.
 - **(b).** Select the appropriate "Type of Property" for each parcel.



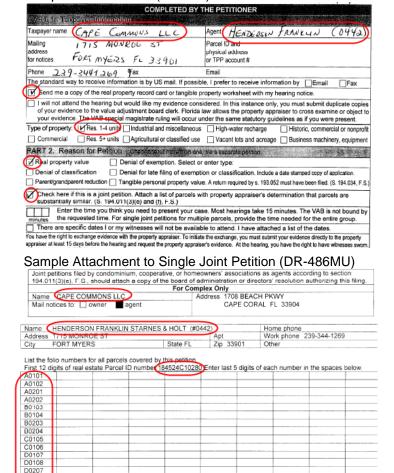
WHEN ALL PARCELS HAVE BEEN ENTERED, GO TO STEP 6. ON PAGE 32

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5. "PROCESS PARCELS" FOR A LARGE NUMBER OF PARCELS (MORE THAN 10) ON ONE PETITION

a. Sample Petition Form (DR-486)

b.



- c. After completing "new transaction" entry <u>Steps 2.a thru 3.d on page 28</u>:
- d. From the "Parcel Information" panel, click on the "Parcel ID" Lookup icon

Total number of parcels this page: 18 Continue on additional pages if nee

Number of pages, including this one:

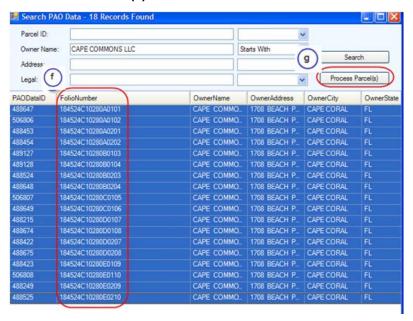


Grand total, number of parcels filed, all page 18

e. In the "Search PAO Data" dialog box, enter "Owner Name" and click "Search".



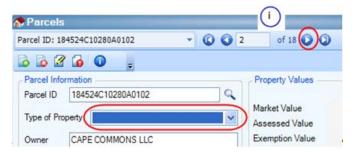
- f. From the "Parcel" (FolioNumber) dropdown list, select those to be added to the petition (18)
- g. Click on "Process Parcel(s)".



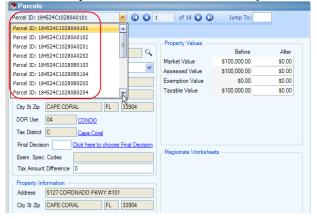
h. All 18 parcels will be added to the transaction, and you will see a "Number of Parcels Added" dialog box stating that 17 parcels have been added. Click "OK" in the dialog box.



i. Use the "arrow" to move to each parcel record, and select the "Type of Property" for each parcel.

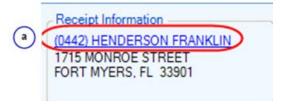


NOTE: You may also use the "Parcels" dropdown list to navigate through the multiple parcels.

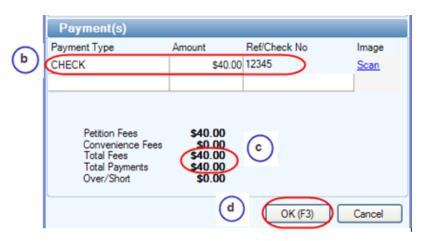


- j. Continue to process the petition beginning at **Step 6.** on the next page. Return to Table of Contents
- 6. COMPLETE PAYMENT INFORMATION

a. Click on the link in the "Receipt Information" panel to return to the "Petitioner/Agent/Payments" window.



- **b.** Enter payment information
- c. Verify that "Total Fees" are equal to "Total Payments".(NOTE: For the "Process Parcels" example in Section 5, the totals for 18 parcels would be \$105.00)
- d. Select "OK(F3)" to return to the "Main Transaction" window.



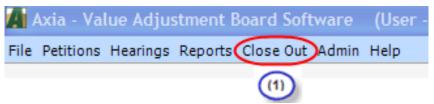
7. FINAL STEPS

- **a.** Scan the petition and other paperwork. (See page 15.)
- **b.** Post the transaction. (See page 16.)
- **c.** Complete the petition filing process. (See page 17.)

IV. DAILY CASHIER CLOSE OUT

The Close Out menu is used by VAB Cashiers to reconcile their daily transactions.

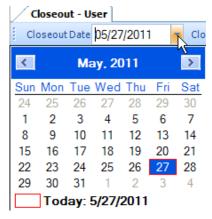
- 1. When all daily transactions have been posted:
 - a. Run separate tapes of all cash and all check receipts, with a "count" on the checks.
 - b. Prepare the "User Close Out Report".
 - (1) On the "Axia Tool Bar", select the "Close Out" menu.



(2) Select "User Close Out".



(3) Use the dropdown calendar to select the appropriate date, if it is not already in the "Closeout Date" box.



- (4) Enter the beginning and ending cash amounts (if any).
- (5) Enter the "User Check Count" and the "User Check Total" amount from your tapes.
- (6) Click anywhere in the "white area" of the screen.

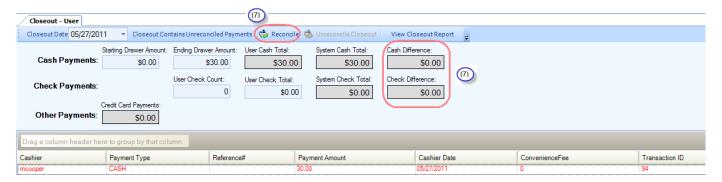


(6)

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(7) If amounts agree, select "Reconcile". If the amounts do not agree, verify the information from your

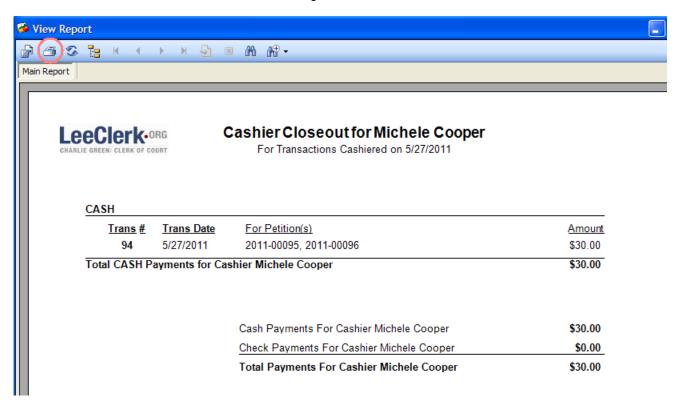
tapes and try again; or contact the Lead VAB Clerk or Office Manager for assistance.



(8) When totals are balanced, select "View Closeout Report" to review the transaction details.



(9) Select the "Print" icon to print the report; and submit the report with your tape, checks, money orders, and/or cash to the Lead VAB Clerk or Office Manager.



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2011 VAB PETITION WITH FILING ISSUE

Revie	ewed by Date		
	ttached petition and paperwork has been submitted for review and action because: ck all reasons that apply)		
1	No check was included with a petition for other than Homestead exemption denial		
2	The check or money order is not signed		
3	The check or money order is not payable to the "Clerk of Courts"		
4	The check or money order is undated or improperly dated.		
5	The amount on the check is incorrect		
A filing agent has not provided a PLN, letter of authorization, or owner signature			
7 Real property parcel ID with "Tangible personal property" "Reason for Petition"			
8	Multiple TPP accounts on one		
9			
10	Multiple parcels on one petition, not vacant property or condominium units		
11	"Joint petition" box checked, no completed DR-486MU		
12	DR-486MU has incorrect parcel count		
13	Multiple parcels on one petition, no contiguity confirmation from PAO		
14	Other: Specify		
	ew by Lead VAB Clerk or e Manager Date		
Action	n taken		
Suspe	ended Transaction No. if any		
Dead	line for Petitioner Response Received		
Final	Action:		

FORM PFI