



# DAWeb

Auditor Controller

## Auditor-Controller Direct Assessment Web Application (DAWeb)

Agency Manual

June 18<sup>th</sup>, 2024

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## INTRODUCTION

DAWeb was created to support the high volume of Direct Assessments (DA) during the annual property tax roll build-up process. In the past, agencies saved DA files on CDs and mailed them to the Auditor-Controller to process. A lot of time was spent waiting for the CD's to arrive, loading and processing each CD and sending reports back to every agency.

DAWeb is a web-based application that enables agencies to upload and submit Direct Assessment (DA), Public Utility (PU) and Correction (COR) files, along with the corresponding legal documents. Agencies will have the ability to retrieve Parcel Change, History/Detail and Data Transmittal reports immediately after their data files are uploaded and validated via DAWeb. The new application provides a faster turnaround and makes the roll build-up process more efficient. For instance, DAWeb eliminates the agencies' time to create and mail their CDs and legal documents to the Auditor and to receive reports from the Auditor. DAWeb also improves accuracy, privacy and security since the information is prepared, submitted and controlled by each agency.

**NOTE: DAWeb is to be used only during the roll build-up process and should not be used to submit corrections during the rest of the year.**

### Contact Person:

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500 West Temple St., Rm. 153  
Los Angeles, CA 90012  
(213) 893-2344  
DAInquiry@auditor.lacounty.gov

# LOGIN PAGE

A. Open an **Internet Browser**.

**DISCLAIMER:** Los Angeles County no longer supports Internet Explorer (IE)11. Microsoft Edge and Chrome are now the preferred browser. Other browsers like Firefox have been tested and can be used but there may be issues with those browsers that we cannot fix/support. If there are any issues that cannot be resolved, then it is recommended to download and use Microsoft Edge and Chrome. To download the latest Microsoft Edge or Google Chrome please follow these links: <https://www.microsoft.com/en-us/edge> or <https://www.google.com/chrome/>

B. Type the following in the address bar: <https://daweb.auditor.lacounty.gov/> and press Enter. On the login screen is a list of Help Menu Options.

The screenshot shows a web browser window with the address bar containing <https://daweb.auditor.lacounty.gov>. The page header displays the Los Angeles County logo, the text "DAWeb Auditor-Controller v 2.4.0.0", and "Welcome, User". The main content area includes a login form with "User Name" and "Password" input fields, a "Log In" button, and a "Forgot Password" link. A "Help Menu Options" sidebar is highlighted with a red box, listing the following items:

- DAWeb Agency Manual
- Virtual Tutorials
- Instructions for Browser History Clean-up
- Suggestions for other web browsers
- DA Submission Procedure Manual
- Billing Agreement template
- DA Exception Report
- DA Payment Listing Report
- Contact

Below the login form, there is a message: "We're currently down for maintenance." followed by a **DISCLAIMER:** "Please note that Internet Explorer (IE) 11 will no longer be supported. MS Edge and Chrome will now be the certified browsers. To access DAWeb, it is recommended to download and use either of these browsers."

**NOTE: Help Menu Options and Descriptions:**

<b>DAWeb Agency Manual</b>	Step-by-step instructions of the DAWeb process. It is important to save or print a copy and reference the latest version. The process and features may change from year to year as we make enhancements to improve your DAWeb experience. The date indicated on the cover page will change if there are any updates made to the manual.
<b>Virtual Tutorials</b>	Virtual training lessons for each section of the DAWeb process. From here, you can select and play each training lesson directly from your PC.
<b>Instructions for Browser History Clean-up</b>	Your web browser automatically saves browser history and Cookies that may interfere with logging in. The link will display instructions on how to clear your browser history and Cookies.
<b>Suggestions for other web browsers</b>	Internet Explorer has security controls that may compromise the functionality of DAWeb. The link provides instructions for installing a different web browser if technical issues are encountered while running the DAWeb application with Internet Explorer.
<b>DA Submission Procedure Manual</b>	The annual submission manual that DA Unit provides to all agencies before DA roll build-up season starts. Important DA processing dates are included
<b>Billing Agreement template</b>	One of the four legal documents that agencies submit. It is a standard agreement between the LA County Auditor-Controller and the Agency for billing and collection of fees for the placement of direct assessments on the Secured Tax Roll (STR). The link will open the template as a Word document.
<b>DA Exception Report</b>	Report by agency containing Direct Assessments submitted into the Secured Tax Roll Update that were invalid parcels (exceptions) and the assessment did not post to the update. Click on the 'Exception Report' tab on the Auditor-Controller website and search the report by agency number.
<b>Direct Payment Listing Report</b>	Report containing the current fiscal year's parcels and DA amounts that were placed on the Secured Tax Roll (STR) for each agency. Click on the 'DA Payment – Secured Master' or 'DA Payment – Secured Master' tab on the Auditor-Controller website and search the report by agency number.
<b>Contact</b>	Click the link to expand the contact information of the DA Unit Supervisor who oversees all direct assessments and DAWeb inquiries.

**NOTE:** The following tabs are located on the Department of Auditor-Controller's website:  
<https://auditor.lacounty.gov/direct-assessments/>

- DA Manual Forms
  - Billing Agreement
  - Agency Information Sheet
- Exception Report
- DA Payment – Secured Master
- DA Payment – Secured Defaulted

The screenshot shows a web browser window with the URL <https://auditor.lacounty.gov/direct-assessments/>. The page header includes the Auditor-Controller logo for Los Angeles County and the LA County Fraud Hotline (1-800-544-6861). The navigation menu includes 'ABOUT THE AUDITOR', 'PROPERTY TAX', 'REPORTS', 'CAREERS', 'UNCLAIMED CHECKS', and 'LINKS OF INTEREST'. Below the navigation menu, there are five tabs: 'Contact List', 'DA Manual and Forms', 'Exception Report', 'DA Payment - Secured Master', and 'DA Payment - Secured Defaulted'. The 'DA Manual and Forms' tab is selected, displaying two main sections: 'Direct Assessment Submission Procedural Manual' and 'Direct Assessment Forms'. The 'Direct Assessment Submission Procedural Manual' section contains a paragraph explaining the manual's purpose and a button labeled '2020-21 Direct Assessment Manual'. The 'Direct Assessment Forms' section lists three forms: 'Billing Agreement', 'Current Year Correction Form', and 'Prior Year Correction Form', each with a document icon.

C. To log in, enter your **User Name** and **Password** and click the **Log In** button.

DAWeb Auditor-Controller v 2.4.0.0

User Name  
auser

Password  
••••••••

Log In  
Forgot Password

### Help Menu Options

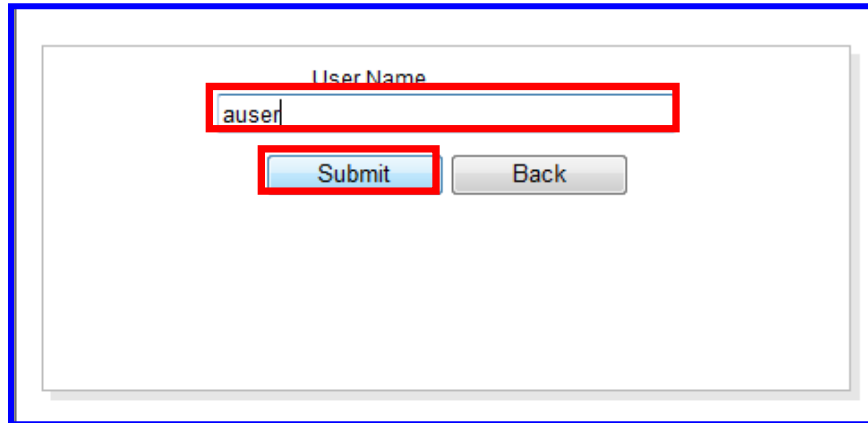
- DAWeb Agency Manual
- Virtual Tutorials
- Instructions for Browser History Clean-up
- Suggestions for other web browsers
- DA Submission Procedure Manual
- Billing Agreement template
- DA Exception Report
- DA Payment Listing Report
- Contact

D. If you do not remember your password, click the **Forgot Password** link.

User Name  
Password

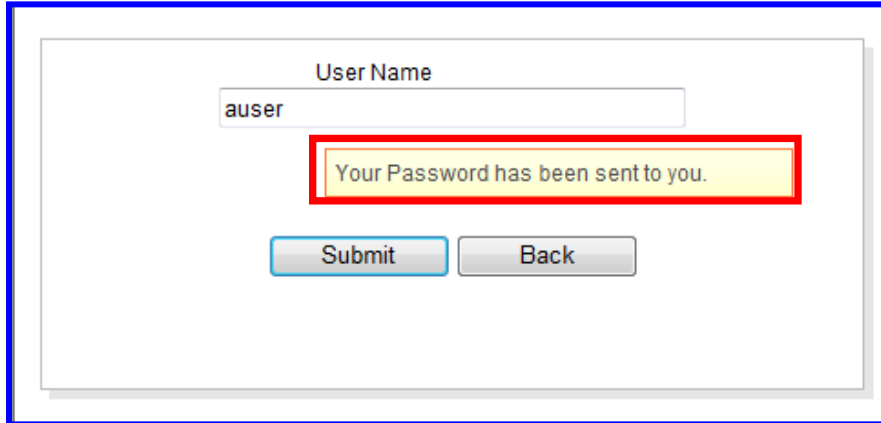
Log In  
Forgot Password

E. Enter your **User Name** and click the **Submit** button.



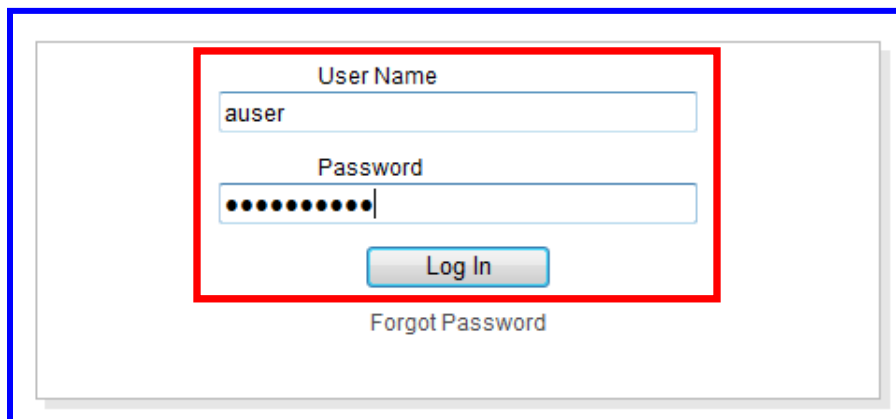
A screenshot of a web form with a blue border. At the top, the text "User Name" is centered above a text input field containing "auser". Below the input field are two buttons: "Submit" (highlighted with a red box) and "Back".

F. A temporary password will be sent via email. Check the Junk or Spam folder if it does not appear in your Inbox.



A screenshot of the same web form with a blue border. The "User Name" field contains "auser". A yellow message box with a red border is centered on the screen, containing the text "Your Password has been sent to you.". Below the message box are the "Submit" and "Back" buttons.

G. Enter your **User Name** and **Temporary Password** and click the **Log In** button.



A screenshot of a web form with a blue border. It features two text input fields: "User Name" containing "auser" and "Password" containing masked characters (dots). Below the fields is a "Log In" button (highlighted with a red box) and a "Forgot Password" link.



- H. A new window will prompt you to change the temporary password. Enter your **new password**, confirm the password and click the **Update** button. DAWeb will take you directly to the Inbox.

The system indicates that you have a temporary password. Please change your password:

Old Password  
mqfq#NAqU!

New Password  
●●●●●●  
(New Password must contain at least one Uppercase, one Lowercase, one Number, at least 4 characters long.)

Confirm Password  
●●●●●●

Update Reset

- I. Always check for new messages from the Auditor in the blue Inbox message bar. The Message area will display important announcements regarding DA Processing.

Options | Log Out | Help

DAWeb Auditor-Controller v 2.3.3.4 Welcome, Agency User

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

Welcome to the DAWEB Training We hope that you enjoy the training and find it useful.... (Hide Details...)

Welcome to the DAWEB Training

We hope that you enjoy the training and find it useful.

**Inbox** NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file

Open Search Panel Submit Refresh

Records: 0 - 0 of 0 - Pages: 1

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
There are no records available.											

Records per page: 100

Records: 0 - 0 of 0 - Pages: 1

J. Click anywhere on the blue Inbox message bar to collapse the message box.

The screenshot shows the DAWeb Auditor-Controller interface. At the top left is the County of Los Angeles logo. The main header features the 'DAWeb Auditor-Controller' logo and version 'v 2.3.3.4'. On the top right, there are links for 'Options | Log Out | Help' and a user greeting 'Welcome, Agency User'. A navigation bar contains links for 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. A blue message bar with a red border contains the text: 'Welcome to the DAWEB Training We hope that you enjoy the training and find it useful.... (Show Details...)'. Below this is the 'Inbox' section with a red note: 'NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file'. There are buttons for 'Open Search Panel', 'Submit', and 'Refresh'. A table header lists columns: 'Fiscal Year', 'Agency #', 'File Type', 'TXN Count', 'Total DA AMT', 'Valid', 'Status', 'Upload Date', 'Submit Date', 'Docs', 'Report', and 'Action'. The table content shows 'There are no records available.' and a 'Records per page' dropdown set to '100'. Navigation controls for records and pages are visible at the bottom right of the table area.

K. Click the Options link if you wish to change your password at any time.

The screenshot shows the DAWeb Auditor-Controller interface with the 'Options' link highlighted in red in the top right corner. The main header is the same as in the previous screenshot. The navigation bar is also the same. The main content area displays a password change form with three input fields: 'Old Password', 'New Password', and 'Confirm Password'. Below the 'New Password' field is a note: '(New Password must contain atleast one Uppercase, one Lowercase, one Number, at least 4 characters long.)'. At the bottom of the form are two buttons: 'Update' and 'Reset'.

L. Click the Help link to access the Help Menu Options from inside DAWeb.

The screenshot shows the DAWeb Auditor-Controller interface. The top navigation bar includes the County of Los Angeles logo, the DAWeb logo, the title "Auditor-Controller", the version "v 2.3.3.4", and the user "Welcome, Agency User". The top right corner has links for "Options", "Log Out", and "Help" (highlighted with a red box). Below the navigation bar is a menu with "Inbox", "Exempt Parcels", "Upload File", "Document Management", "Upload Document", and "Create AIS Form". The main content area is titled "Help Menu Options" and contains a list of links: "DAWeb Agency Manual", "Virtual Tutorials", "Instructions for Browser History Clean-up", "Suggestions for other web browsers", "DA Submission Procedure Manual", "Billing Agreement template", "DA Exception Report", "DA Payment Listing Report", and "Contact".

M. Click the Log Out link to log out of DAWeb.

The screenshot shows the DAWeb Auditor-Controller interface. The top navigation bar includes the County of Los Angeles logo, the DAWeb logo, the title "Auditor-Controller", the version "v 2.3.3.4", and the user "Welcome, Agency User". The top right corner has links for "Options", "Log Out" (highlighted with a red box), and "Help". Below the navigation bar is a menu with "Inbox", "Exempt Parcels", "Upload File", "Document Management", "Upload Document", and "Create AIS Form". A blue banner message reads "Welcome to the DAWEB Training We hope that you enjoy the training and find it useful.... (Hide Details...)". Below the banner is a yellow link "Welcome to the DAWEB Training" and the text "We hope that you enjoy the training and find it useful." The main content area is titled "Inbox" and contains a red note: "NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file". Below the note are buttons for "Open Search Panel", "Submit", and "Refresh". A table header is visible with columns: "Fiscal Year", "Agency #", "File Type", "TXN Count", "Total DA AMT", "Valid", "Status", "Upload Date", "Submit Date", "Docs", "Report", and "Action". Below the table header is the text "There are no records available." and a "Records per page" dropdown set to "100".

# CREATE AGENCY INFORMATION SHEET FORM

Agencies cannot proceed with submitting Direct Assessments or Public Utility files onto DAWEB without first creating and saving the Agency Information Sheet Form.

Note: All upload file and upload document options will be disabled if you are attempting to upload a file without first creating an Agency Information Sheet.

- 1A. To create an Agency Information Sheet, click the **Create AIS Form** tab.  
**NOTE: Any manual modifications will be subject for denial of the forms.**

The screenshot shows the DAWeb Auditor-Controller interface. At the top left is the County of Los Angeles seal. The main header features the 'DAWeb' logo in large, stylized letters, followed by 'Auditor-Controller' and the version number 'v 2.4.0.0'. A navigation bar below the header contains several tabs: 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. The 'Create AIS Form' tab is highlighted with a red border. Below the navigation bar, a red note reads: 'NOTE: Any manual modifications will be subject for denial of the forms.' The main content area is titled 'AGENCY INFORMATION SHEET' and contains a dropdown menu labeled 'Please select Account Number' with '[Select One]' as the current selection.

- 1B. Select **Account Number** from the dropdown menu.

This screenshot is similar to the one above but highlights the 'Create AIS Form' tab and the dropdown menu with red borders. The navigation bar and the 'AGENCY INFORMATION SHEET' title are visible. The dropdown menu is now highlighted in blue, and the text 'Please select Account Number' is positioned to its left.

1C. Verify that the **Account Number, 16 Character Bill Description, and Agency Description** is correct.

 **DAWeb** Auditor-Controller v 2.4.0.0  
Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form R

**NOTE: Any manual modifications will be subject for denial of the forms.**

## AGENCY INFORMATION SHEET

Please select Account Number

000.04 AGENCY TEST (Account Number and 16 Character Bill Description)
TEST AGENCY (Agency Description)

Please be advised that for Fiscal Year (FY) 2024-2025 (check appropriate box):

- 1. We will **not** submit Direct Assessment (DA) Input for the above referenced account (check appropriate box):
  - Current Year (FY state above)  Future Years (No Longer Active)
- 2. We will submit DA Input for the above referenced direct assessment account on or before **August 10<sup>th</sup>**.
- 3. We have a written authority to levy assessments (i.e. resolution, ordinance, certified election results) until:
  - Expiration Date   No Expiration Date (Ongoing Resolution)
- 4. We have received, read and understood the 2024 DA Submission Procedure Manual.
- 5. We have chosen (check appropriate box) Option 1  or Option 2  for the DA Processing Undergoing Parcel Changes (see page 13 of DA Submission Procedural Manual).

The following are the Agency contacts for taxpayer inquiries and processing questions regarding direct assessment charges for the above referenced account number:

### Bill Information

Consultant Agency Name or  Levying Agency (City/Department Name)

Contact Name:

Website:

Phone No. To Be Listed On Tax Bill: ()- ext.

Contact's Address 1:

Address 2:  City:  State:  Zip Code:

### Processing Information

Consultant Agency Name or  Levying Agency (City/Department Name)

Contact Name:  Phone No.: ()- ext.

Consultant/Levying Agency E-mail Address:

The Auditor-Controller will forward all Direct Assessment correspondence to the attention of the Director of Finance/Manager/Authorized Consulting Agency. Signature indicates that all above information is correct.

### Authorized Signee

Director of Finance  Manager  Authorized Consulting Agent  Other(Title):

Name:

**1D. Determine if the Agency will or will not be submitting Direct Assessments for the Current Fiscal Year.**

If the Agency is not submitting, select **checkbox 1** and select either **Current Year** or **Future Years**. Then, enter your **Billing** and **Processing Information**. Under Website, enter your Agency website leading with http:// or https://. Select the **Authorized Signee Title** and input the **Authorized Signee Name**. All other fields will collapse as they are not required.

If the Agency is submitting, please proceed to **1H** for instructions.



**NOTE: Any manual modifications will be subject for denial of the forms.**

### AGENCY INFORMATION SHEET

Please select Account Number

000.04 AGENCY TEST  
(Account Number and 16 Character Bill Description)

TEST AGENCY  
(Agency Description)

Please be advised that for Fiscal Year (FY) 2024-2025 (check appropriate box):

1. We will **not** submit Direct Assessment (DA) Input for the above referenced account (check appropriate box):

Current Year (FY state above)  Future Years (No Longer Active)

The following are the Agency contacts for taxpayer inquiries and processing questions regarding direct assessment charges for the above referenced account number:

**Bill Information**

Consultant Agency Name or  Levying Agency (City/Department Name)

Contact Name:

Website:

Phone No. To Be Listed On Tax Bill: (\_\_\_\_)\_\_\_\_-\_\_\_\_ ext.

Contact's Address 1:

Address 2:  City:  State:  Zip Code:

**Processing Information**

Consultant Agency Name or  Levying Agency (City/Department Name)

Contact Name:  Phone No.: (\_\_\_\_)\_\_\_\_-\_\_\_\_ ext.

Consultant/Levying Agency E-mail Address:

The Auditor-Controller will forward all Direct Assessment correspondence to the attention of the Director of Finance/Manager/Authorized Consulting Agency. Signature indicates that all above information is correct.

**Authorized Signee**

Director of Finance  Manager  Authorized Consulting Agent  Other(Title):

Name:

1E. Once the form is completed, click on **Save**. To start the form over, click on **Clear Form**.

**Important Message:** Once the form is saved on DAWEB, Upload File and Upload Document will be enabled.

**NOTE:** Any manual modifications will be subject for denial of the forms.

## AGENCY INFORMATION SHEET

Please select Account Number

000.04 AGENCY TEST  
(Account Number and 16 Character Bill Description)

TEST AGENCY  
(Agency Description)

Please be advised that for Fiscal Year (FY) 2024-2025 (check appropriate box):

1. We will not submit Direct Assessment (DA) Input for the above referenced account (check appropriate box):  
 Current Year (FY state above)  Future Years (No Longer Active)

The following are the Agency contacts for taxpayer inquiries and processing questions regarding direct assessment charges for the above referenced account number:

### Bill Information

- Consultant Agency Name or  Levying Agency (City/Department Name)

Consultant Agency Name

Contact Name:

Website:

Phone No. To Be Listed On Tax Bill:  ext.

Contact's Address 1:

Address 2:  City:  State:  Zip Code:

### Processing Information

- Consultant Agency Name or  Levying Agency (City/Department Name)

Consulting Agency Name

Contact Name:  Phone No.:  ext.

Consultant/Levying Agency E-mail Address:

The Auditor-Controller will forward all Direct Assessment correspondence to the attention of the Director of Finance/Manager/Authorized Consulting Agency. Signature indicates that all above information is correct.

### Authorized Signee

- Director of Finance  Manager  Authorized Consulting Agent  Other(Title):

Name:

CLEAR FORM

SAVE

1F. After you click Save, **Print** button will appear. Click on **Print** and a new window will open with print options.

**NOTE: Any manual modifications will be subject for denial of the forms.**

## AGENCY INFORMATION SHEET

Please select Account Number

000.04 AGENCY TEST  
(Account Number and 16 Character Bill Description)

TEST AGENCY  
(Agency Description)

Please be advised that for Fiscal Year (FY) 2024-2025 (check appropriate box):

1. We will **not** submit Direct Assessment (DA) Input for the above referenced account (check appropriate box):  
 Current Year (FY state above)  Future Years (No Longer Active)

The following are the Agency contacts for taxpayer inquiries and processing questions regarding direct assessment charges for the above referenced account number:

### Bill Information

- Consultant Agency Name or  Levying Agency (City/Department Name)

Consultant Agency Name

Contact Name:

Website:

Phone No. To Be Listed On Tax Bill:  ext.

Contact's Address 1:

Address 2:  City:  State:  Zip Code:

### Processing Information

- Consultant Agency Name or  Levying Agency (City/Department Name)

Consulting Agency Name

Contact Name:  Phone No.:  ext.

Consultant/Levying Agency E-mail Address:

The Auditor-Controller will forward all Direct Assessment correspondence to the attention of the Director of Finance/Manager/Authorized Consulting Agency. Signature indicates that all above information is correct.

### Authorized Signee

- Director of Finance  Manager  Authorized Consulting Agent  Other(Title):

Name:



**1G.** A sample of the completed AIS Form will appear.

Please print the document, sign and date, scan the document as .PDF format and upload the signed document to DAWEB. (Refer to 'Upload Legal Documents' section P. 87)

**AGENCY INFORMATION SHEET**

**000.04 AGENCY TEST**

(Account Number and 16 Character Bill Description)

**TEST AGENCY**

(Agency Description)

Please be advised that for Fiscal Year (FY) 2024-2025 (check appropriate box):

- 1. We will **not** submit Direct Assessment (DA) Input for the above referenced account (check appropriate box):
  - Current Year (FY stated above)       Future Years (No Longer Active)
- 2. We will submit DA Input for the above referenced direct assessment account on or before **August 10th**.
- 3. We have a written authority to levy assessments (i.e. resolution, ordinance, certified election results) until:
  - Expiration Date \_\_\_\_\_       No Expiration Date (Ongoing Resolution)
- 4. We have received, read and understood the 2024 DA Submission Procedure Manual.
- 5. We have chosen (check appropriate box) Option 1  or Option 2  for the DA Processing Undergoing Parcel Changes (see page 13 of DA Submission Procedural Manual)

The following are the Agency contacts for taxpayer inquiries and processing questions regarding direct assessment charges for the above referenced account number:

**Bill Information**

Consultant Agency Name or       Levying Agency (City/Department Name)

Consultant Agency Name \_\_\_\_\_

Contact Name: Contact First and Last Name \_\_\_\_\_

Website: <https://testagency.com>

Phone No. To Be Listed On Tax Bill: (213)123-4123 ext. \_\_\_\_\_

Contact's Address 1: 1000 Angeles St. \_\_\_\_\_

Address 2: \_\_\_\_\_ City: Los Angeles State: CA Zip Code: 90012

**Processing Information**

Consultant Agency Name or       Levying Agency (City/Department Name)

Consulting Agency Name \_\_\_\_\_

Contact Name: Consultant Name \_\_\_\_\_ Phone No.: (310)123-4578 ext. 678

Consultant/Levying Agency E-mail Address: consultants123@consult.com

The Auditor-Controller will forward all direct assessment correspondence to the attention of the Director of Finance/Manager/Authorized Consulting Agency. Signature indicates that all above information is correct.

**Authorized Signee**

Director of Finance       Manager       Authorized Consulting Agent       Other (Title): \_\_\_\_\_

Name: First and Last Name \_\_\_\_\_  
(PRINT NAME)

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Note: All changes must be updated and saved on the online fillable form only. Do not modify the PDF or Hardcopy.

1H. If the Agency is submitting a Direct Assessment, please follow these instructions.

1. Select **Checkbox 2**. Checkbox 1 will collapse.
2. Select **Checkbox 3** and select **Expiration Date** and enter date or select **No Expiration Date**.
3. Select **Checkbox 4**
4. Select **Checkbox 5** and select **Option 1** or **Option 2**

**NOTE:** All **Checkboxes**, **Expiration Date**, and **Option** will have to be selected for the Agency Information Sheet to be valid.

**NOTE: Any manual modifications will be subject for denial of the forms.**

## AGENCY INFORMATION SHEET

Please select Account Number

000.02 AGENCY TEST 2  
(Account Number and 16 Character Bill Description)

TEST AGENCY 2  
(Agency Description)

Please be advised that for Fiscal Year (FY) 2020-2021 (check appropriate box):

2. We will submit DA Input for the above referenced direct assessment account on or before **August 10<sup>th</sup>**.
3. We have a written authority to levy assessments (i.e. resolution, ordinance, certified election results) until:  
 Expiration Date   No Expiration Date (Ongoing Resolution)
4. We have received, read and understood the 2020 DA Submission Procedure Manual.
5. We have chosen (check appropriate box)  Option 1 or  Option 2 for the DA Processing Undergoing Parcel Changes (see page 13 of DA Submission Procedural Manual).

11. **Next step is to complete the Bill Information.** This will be the Agency Contact Information. All fields will need to be completed for the Agency Information Sheet to be valid.
1. Consultant Agency Name or Levying Agency (City/Department Name) – Select Consultant Agency if representing the Agency, or Levying Agency if Agency is representing themselves.
  2. **Contact Name** – Enter First and Last Name.
  3. **Website** – Enter Agency web address with leading http:// or https:// if applicable.
  4. Enter **Phone Number** and **ext.** to be used on tax database.
    - i. If **Phone Number** and **ext.** was created last year, the form will prepopulate with last year's number.
    - ii. **Verify that the prepopulated phone number is correct, or reinput correct number.**
  5. Enter **Contact's Address, City, State,** and **Zip Code** to be used on tax database.
    - i. If **Contact's Address, City, State,** and **Zip Code** was created last year, the form will prepopulate with last year's information.
    - ii. **Verify that the prepopulated address is correct, or reinput correct address.**

Note: New Accounts will not have phone number or address saved on DAWeb.

**NOTE: Any manual modifications will be subject for denial of the forms.**

## AGENCY INFORMATION SHEET

Please select Account Number

000.04 AGENCY TEST  
(Account Number and 16 Character Bill Description)

TEST AGENCY  
(Agency Description)

Please be advised that for Fiscal Year (FY) 2024-2025 (check appropriate box):

- 2. We will submit DA Input for the above referenced direct assessment account on or before **August 10<sup>th</sup>**.
- 3. We have a written authority to levy assessments (i.e. resolution, ordinance, certified election results) until:
  - Expiration Date   No Expiration Date (Ongoing Resolution)
- 4. We have received, read and understood the 2024 DA Submission Procedure Manual.
- 5. We have chosen (check appropriate box) Option 1  or Option 2  for the DA Processing Undergoing Parcel Changes (see page 13 of DA Submission Procedural Manual).

The following are the Agency contacts for taxpayer inquiries and processing questions regarding direct assessment charges for the above referenced account number:

**Bill Information**

Consultant Agency Name or  Levying Agency (City/Department Name)

Contact Name:

Website:

Phone No. To Be Listed On Tax Bill:  ext:

Contact's Address 1:

Address 2:  City:  State:  Zip Code:

1J. The next section is the **Processing Information**. This will be the Consultant's contact information if they are representing the Agency. If the Agency is representing themselves, they will also need to fill out the Contact information. All fields need to be completed for the Agency Information Sheet to be valid.

1. Select **Consulting Agency** if representing the Agency, or **Levying Agency** if Agency is representing themselves.
2. Enter **Contact Name, Phone Number, ext.** (if applicable), and **Email Address**.

**NOTE: Any manual modifications will be subject for denial of the forms.**

## AGENCY INFORMATION SHEET

Please select Account Number

000.02 AGENCY TEST 2  
(Account Number and 16 Character Bill Description)

TEST AGENCY 2  
(Agency Description)

Please be advised that for Fiscal Year (FY) 2020-2021 (check appropriate box):

- 2. We will submit DA Input for the above referenced direct assessment account on or before **August 10<sup>th</sup>**.
- 3. We have a written authority to levy assessments (i.e. resolution, ordinance, certified election results) until:  
 Expiration Date   No Expiration Date (Ongoing Resolution)
- 4. We have received, read and understood the 2020 DA Submission Procedure Manual.
- 5. We have chosen (check appropriate box) Option 1  or Option 2  for the DA Processing Undergoing Parcel Changes (see page 13 of DA Submission Procedural Manual).

The following are the Agency contacts for taxpayer inquiries and processing questions regarding direct assessment charges for the above referenced account number:

**Bill Information**

Consultant Agency Name or  Levying Agency (City/Department Name)

Contact Name:

Website:

Phone No. To Be Listed On Tax Bill:  ext.

Contact's Address 1:

Address 2:  City:  State:  Zip Code:

**Processing Information**

Consultant Agency Name or  Levying Agency (City/Department Name)

Contact Name:  Phone No.  ext.

Consultant/Levying Agency E-mail Address:

1K. The final section is the **Authorized Signee**. Please do the following:

1. Select the **Authorized Signee Title**
2. Enter the **Authorized Signee** First and Last Name.
3. Once the form is completed, click on **Save**.
4. To start the form over, click on **Clear Form**.

**Important Message:** Once the form is saved on DAWEB, Upload File and Upload Document will be enabled.



**NOTE:** Any manual modifications will be subject for denial of the forms.

## AGENCY INFORMATION SHEET

Please select Account Number

001.72 R&T 482 PNLTY 2  
(Account Number and 16 Character Bill Description)

LOS ANGELES COUNTY ASSESSOR'S OFFICE LEOP  
(Agency Description)

Please be advised that for Fiscal Year (FY) 2024-2025 (check appropriate box):

1. We will not submit Direct Assessment (DA) Input for the above referenced account (check appropriate box):  
 Current Year (FY state above)  Future Years (No Longer Active)

The following are the Agency contacts for taxpayer inquiries and processing questions regarding direct assessment charges for the above referenced account number:

### Bill Information

Consultant Agency Name or  Levying Agency (City/Department Name)

Contact Name:

Website:

Phone No. To Be Listed On Tax Bill:  ext.

Contact's Address 1:

Address 2:  City:  State:  Zip Code:

### Processing Information

Consultant Agency Name or  Levying Agency (City/Department Name)

Contact Name:  Phone No.:  ext.

Consultant/Levying Agency E-mail Address:

The Auditor-Controller will forward all Direct Assessment correspondence to the attention of the Director of Finance/Manager/Authorized Consulting Agency. Signature indicates that all above information is correct.

### Authorized Signee

Director of Finance  Manager  Authorized Consulting Agent  Other(Title):

Name:

1L. After you click Save, **Print** button will appear. Click on **Print** and a new window will open with print options.



**NOTE: Any manual modifications will be subject for denial of the forms.**

## AGENCY INFORMATION SHEET

Please select Account Number

001.72 R&T 482 PNLTY 2  
(Account Number and 16 Character Bill Description)

LOS ANGELES COUNTY ASSESSOR'S OFFICE LEOP  
(Agency Description)

Please be advised that for Fiscal Year (FY) 2024-2025 (check appropriate box):

1. We will not submit Direct Assessment (DA) Input for the above referenced account (check appropriate box):  
 Current Year (FY state above)  Future Years (No Longer Active)

The following are the Agency contacts for taxpayer inquiries and processing questions regarding direct assessment charges for the above referenced account number:

### Bill Information

Consultant Agency Name or  Levying Agency (City/Department Name)

Contact Name:

Website:

Phone No. To Be Listed On Tax Bill:  ext.

Contact's Address 1:

Address 2:  City:  State:  Zip Code:

### Processing Information

Consultant Agency Name or  Levying Agency (City/Department Name)

Contact Name:  Phone No.:  ext.

Consultant/Levying Agency E-mail Address:

The Auditor-Controller will forward all Direct Assessment correspondence to the attention of the Director of Finance/Manager/Authorized Consulting Agency. Signature indicates that all above information is correct.

### Authorized Signee

Director of Finance  Manager  Authorized Consulting Agent  Other(Title):

Name:

CLEAR FORM

SAVE

PRINT





1N. Failure to correctly input all required fields of the Agency Information Sheet Form will be displayed in red.

Please select Account Number

000.04 AGENCY TEST  
(Account Number and 16 Character Bill Description)  
TEST AGENCY  
(Agency Description)

Please be advised that for Fiscal Year (FY) 2024-2025 (check appropriate box):

- Current Year or Future Year is required
- Checkbox 1 or 2 is required
- Checkbox 3 is required
- Expiration Date or no Expiration Date checkbox is required
- Checkbox 4 is required
- Checkbox 5 is required
- Checkbox Option 1 or Option 2 is required
- Checkbox Consultant or Levying Agency is required
- Consultant Agency Name or Levying Agency (City/Department Name) is required
- Bill Contact Name is required
- Invalid Bill Information Phone format
- Contact's Address 1 is required
- Contact's Address City is required
- Contact's Address State is required
- Contact's Address Zipcode is required
- Checkbox Consultant or Levying Agency is required
- Consultant Agency Name or Levying Agency (City/Department Name) is required
- Processing Contact's Name is required
- Invalid Processing Information Phone format
- Consultant/Levying Agency E-mail is required
- Checkbox Authorized Signee is required
- Signee Name is required

1. We will not submit Direct Assessment (DA) Input for the above referenced account (check appropriate box):  
 Current Year (FY state above)  Future Years (No Longer Active)

2. We will submit DA Input for the above referenced direct assessment account on or before August 10<sup>th</sup>.

3. We have a written authority to levy assessments (i.e. resolution, ordinance, certified election results) until:  
 Expiration Date   No Expiration Date (Ongoing Resolution)

4. We have received, read and understood the 2024 DA Submission Procedure Manual.

5. We have chosen (check appropriate box) Option 1  or Option 2  for the DA Processing Undergoing Parcel Changes (see page 13 of DA Submission Procedural Manual).

The following are the Agency contacts for taxpayer inquiries and processing questions regarding direct assessment charges for the above referenced account number:

**Bill Information**

Consultant Agency Name or  Levying Agency (City/Department Name)

Contact Name:

Website:

Phone No. To Be Listed On Tax Bill: (  )  -  ext.

Contact's Address 1:

Address 2:  City:  State:  Zip Code:

**Processing Information**

Consultant Agency Name or  Levying Agency (City/Department Name)

Contact Name:  Phone No.: (  )  -  ext.

Consultant/Levying Agency E-mail Address:

The Auditor-Controller will forward all Direct Assessment correspondence to the attention of the Director of Finance/Manager/Authorized Consulting Agency. Signature indicates that all above information is correct.

**Authorized Signee**

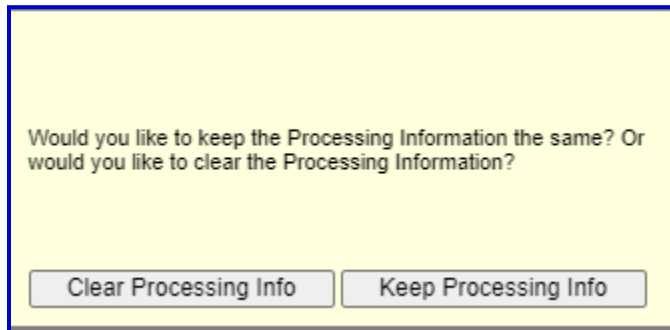
Director of Finance  Manager  Authorized Consulting Agent  Other (Title):

Name:





10. Once the AIS form is saved, you can select a different Account Number (if the agency handles multiple accounts) from the drop down, once an account number is selected it will create the following Prompt giving the agency the option to save the Processing Information.



Would you like to keep the Processing Information the same? Or would you like to clear the Processing Information?

Clear Processing Info      Keep Processing Info

Clear Processing Info will display a blank Agency Information Sheet and Keep Processing Info will preserve the Processing Information for the next Account.

# RETRIEVE THE PARCEL CHANGE REPORT

## \*\*\*IMPORTANT MESSAGE\*\*\*

**New agencies cannot retrieve the Parcel Change report until the current year data file is uploaded to DAWeb. Please proceed to 'Create the Excel Input Data File' section (P. 33) or 'Create the Text Input Data File' section (P. 42).**

**Only returning agencies can retrieve the Parcel Change Report in this section.**

**2A. The Parcel Change file** for the new fiscal year becomes available at the **end of June**. Returning Agencies will retrieve the new Parcel Change Report by **locating the previous year's Direct Assessment and Public Utility files** by clicking on the **Open Search Panel** tab in the **Inbox**.

The screenshot shows the DAWeb Auditor-Controller interface. The header includes the County of Los Angeles logo, the DAWeb logo, and the Auditor-Controller title. The version is v 2.4.0.0. The user is logged in as 'Welcome, Agency User'. The main navigation bar includes 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. The 'Inbox' page displays a note: 'NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file'. Below the note are buttons for 'Open Search Panel', 'Submit', and 'Refresh'. The 'Open Search Panel' button is highlighted with a red box. Below the buttons is a table with columns: Fiscal Year, Agency #, File Type, TXN Count, Total DA AMT, Valid, Status, Upload Date, Submit Date, Docs, Report, and Action. The table is currently empty, displaying 'There are no records available.' The page also shows 'Records: 0 - 0 of 0 - Pages: 1' and 'Records per page: 100'.

**2B. Enter the previous Fiscal Year (enter 2021 in FY 2022) and click the Search button to retrieve all of your previous year files.**

The screenshot shows the DAWeb Auditor-Controller interface with the Search Panel modal open. The 'Fiscal Year' field is set to '2021' and is highlighted with a red box. The 'Search' button is also highlighted with a red box. The modal includes fields for 'Agency Number', 'File Type', 'Valid', 'Status', and 'Upload Date'. The 'Search' button is highlighted with a red box. The background shows the same 'Inbox' page as in the previous screenshot, but the table is partially obscured by the modal. The 'Search' button is highlighted with a red box.

**NOTE:** More specific searches can be done by entering any combination of the **Fiscal Year, Agency Number, File Type, Valid, Status and Upload Date** ranges.

Click the **Reset** button to clear the search criteria and reset the Inbox back to the default search (current fiscal year). Click the **Close Search Panel** button to close the Search Panel.

The screenshot shows the DAWeb Auditor-Controller interface. At the top, there is a navigation bar with the DAWeb logo and the text "Auditor-Controller v 2.4.0.0". Below the navigation bar, there are several menu items: "Inbox", "Exempt Parcels", "Upload File", "Document Management", "Upload Document", and "Create AIS Form". The "Inbox" menu item is selected, and a red note is displayed: "NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file". Below the note, there are three buttons: "Open Search Panel", "Submit", and "Refresh". A "Search Panel" is open, showing search criteria for Fiscal Year (2021), Agency Number, File Type (All), Valid (All), Status (All), and Upload Date (From and To). The search panel also has "Search", "Reset", and "Close Search Panel" buttons. In the background, the "Inbox" table is visible, showing columns for "Total DA AMT", "Valid", "Status", "Upload Date", "Submit Date", "Docs", "Report", and "Action". The table currently displays "There are no records available."

## SEARCH FEATURES

1	<b>Fiscal Year</b>	Fiscal Year that the Agency Number was processed.
2	<b>Agency #</b>	Direct Assessment Agency Number assigned to each agency by the Auditor-Controller.
3	<b>File Type</b>	File Type submitted for STR processing. The four file types are as follows: <ul style="list-style-type: none"> <li>• <b>Direct Assessment</b></li> <li>• <b>Public Utility</b></li> <li>• <b>DA Correction</b></li> <li>• <b>PU Correction</b></li> </ul>
4	<b>Valid</b>	Indicates if the file submitted is <b>valid</b> (Valid = 'yes') or <b>invalid</b> (Valid = 'no').
5	<b>Status</b>	Tracks the progress of the agency number throughout the DA process. The status options are as follows: <ul style="list-style-type: none"> <li>• <b>Work In Progress</b></li> <li>• <b>Pending Review</b></li> <li>• <b>Pending Approval</b></li> <li>• <b>Supervisor Approved</b></li> <li>• <b>Batched</b></li> <li>• <b>Sent to Mainframe</b></li> <li>• <b>Failed in Batching</b></li> </ul>
6	<b>Upload Date From: &amp; To:</b>	- Date Range of when the file was uploaded to DAWeb.

2C. Click the **PCL CHG RPT** link under the **Report** column for each of your previous year's files. The previous year's files will be run against the current year's Parcel Change file to produce the Parcel Change Report.

**DAWeb Auditor-Controller v 2.4.0.0**

**Inbox** NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file

Open Search Panel Submit Refresh

Records: 1 - 10 of 734 - Pages: 1 | 2 | 3 | 4 | 5

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action	
<input type="checkbox"/>	2021	939.21	PU	2	\$8,857.59	yes	SENT TO MAINFRAME	08/10/2021	08/10/2021	4	<b>PCL CHG RPT</b> Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2021	939.21	DA	6,069	\$2,559,843.51	yes	SENT TO MAINFRAME	08/09/2021	08/09/2021	4	<b>PCL CHG RPT</b> Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2021	931.72	DA COR v4	2,499	\$0.00	yes	SENT TO MAINFRAME	08/10/2021	08/15/2021	4	<b>PCL CHG RPT</b> Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2021	931.72	DA	32,476	\$14,270,279.16	yes	SENT TO MAINFRAME	08/09/2021	08/15/2021	4	<b>PCL CHG RPT</b> Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2021	923.55	DA	4,224	\$4,088,832.00	yes	SENT TO MAINFRAME	08/02/2021	08/02/2021	4	<b>PCL CHG RPT</b> Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2021	923.51	DA	4,232	\$1,617,724.32	yes	SENT TO MAINFRAME	08/02/2021	08/02/2021	4	<b>PCL CHG RPT</b> Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2021	905.62	DA	20,194	\$9,435,848.44	yes	SENT TO MAINFRAME	08/10/2021	08/10/2021	4	<b>PCL CHG RPT</b> Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

2D. **Blank Parcel Change Report** means that there are **no parcel changes from the previous year**. This is normal and should not be a concern. **Click** the **X** to close the document and continue checking other files for parcel changes.

https://qa.daweb.auditor.lacounty.gov/Rpt\_PCLCHG.aspx?FileID=29&DocumentID=5237 - Work - Microsoft Edge

https://qa.daweb.auditor.lacounty.gov/Rpt\_PCLCHG.aspx?FileID=29&DocumentID=5237

Find... 1 of 1 100%

**Main Report**

2021 PARCEL CHANGE FILE PARCEL CHANGE REPORT RUN DATE 06/29/2021  
AGENCY NUMBER 999.99 UPLOAD DATE 06/16/2020

TOTAL OLD PARCEL CNT: 2  
TOTAL NEW PARCEL CNT: 10  
FILE TYPE: Direct Assessment File  
FILE NAME: DA\_2018\_99999.xls

ID	PCL	FORMAT	STATUS	AGENCY NUMBER	DA AMOUNT
2190619280010015319003018		11	O	999.99	598.50
2190619280010015319003052		11	N		0
2190702280010015311010022		11	O	999.99	604.80
2190702280010015311010066		11	T		0
2190807730010015311010066		1M	T		0
2190807730010015311010067		1M	N		0
2190807730010015311010068		1M	N		0
2190807730010015311010069		1M	N		0
2190807730010015311010070		1M	N		0

2E. **Print** or **Export** the Parcel Change report for your reference. The file can be exported to PDF or Excel format. This report will be used in the following sections: **'Create the Excel Input Data File' (P. 33)** or **'Create the Text Input Data File' (P. 42)**

https://qa.daweb.auditor.lacounty.gov/Rpt\_PCLCHG.aspx?FileID=29&DocumentID=5237 - Work - Microsoft Edge

https://qa.daweb.auditor.lacounty.gov/Rpt\_PCLCHG.aspx?FileID=29&DocumentID=5237

Find... 1 of 1 100%

Main Report

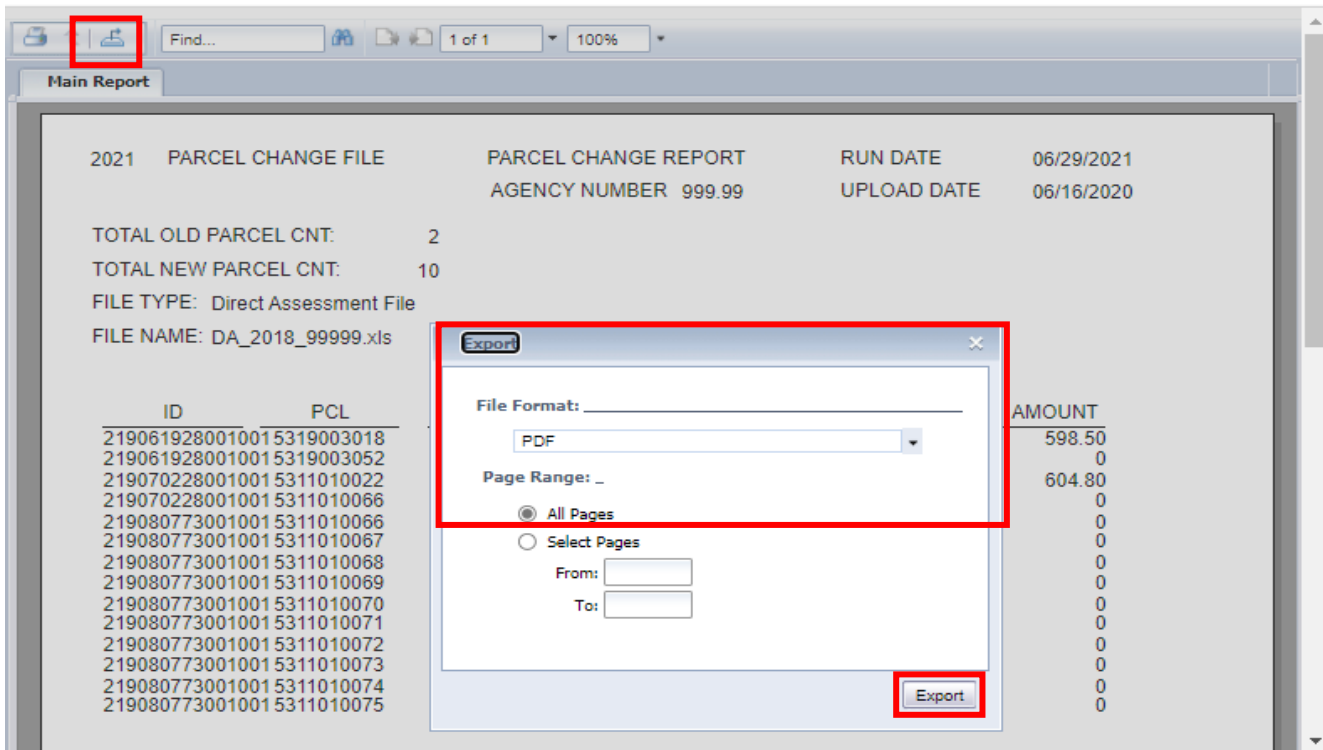
1	2021	PARCEL CHANGE FILE	2	PARCEL CHANGE REPORT	4	RUN DATE	06/29/2021
6		TOTAL OLD PARCEL CNT:	2		5	UPLOAD DATE	06/16/2020
7		TOTAL NEW PARCEL CNT:	10				
8		FILE TYPE:					
9		FILE NAME:					

ID	PCL	FORMAT	STATUS	AGENCY NUMBER	DA	AMOUNT
2190619280010015319003018		11	O	999.99		598.50
2190619280010015319003052		11	N			0
2190702280010015311010022		11	O	999.99		604.80
2190702280010015311010066		11	T			0
2190807730010015311010066		1M	T			0
2190807730010015311010067		1M	N			0
2190807730010015311010068		1M	N			0
2190807730010015311010069		1M	N			0

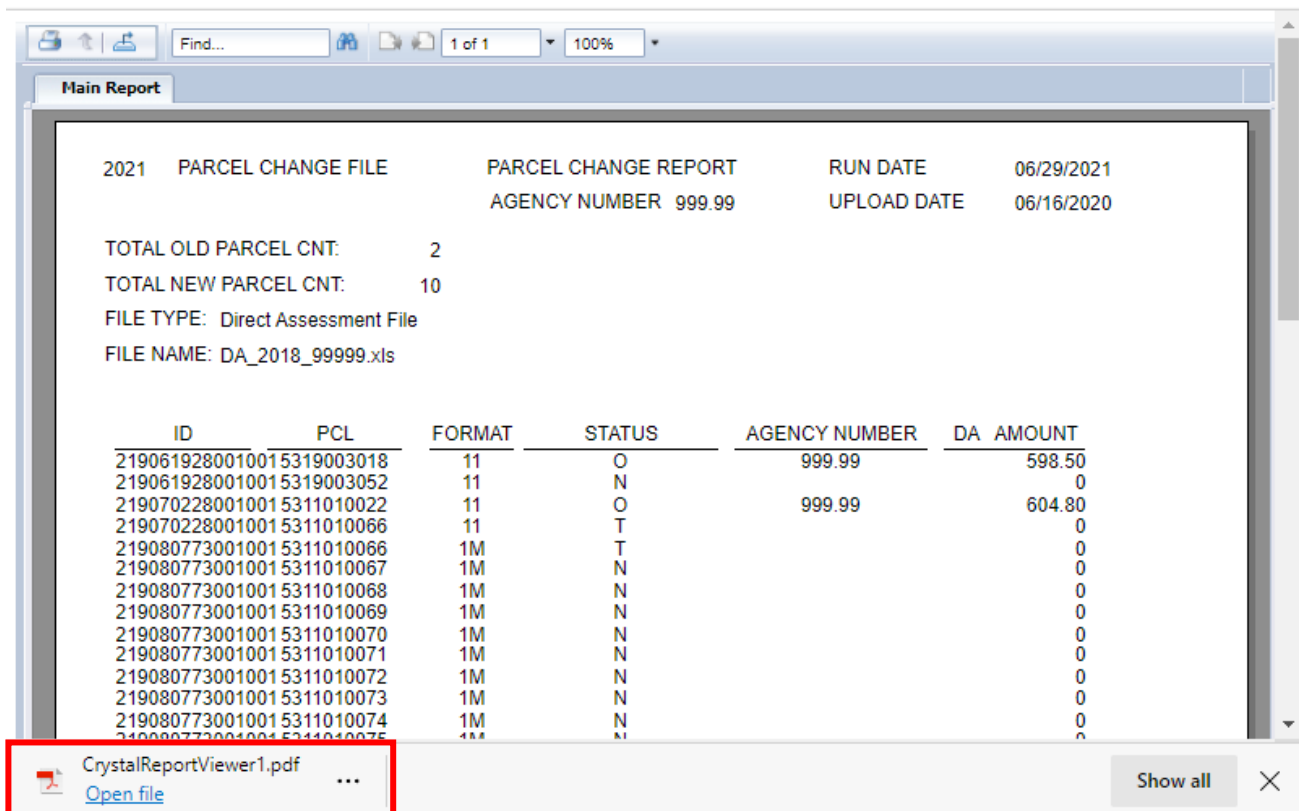
**NOTE:** Listed below are the fields on the **Parcel Change Report**.

1	<b>YYYY Parcel Change File</b>	<b>YYYY</b> = year of the Parcel Change File used in generating this report
2	<b>Parcel Change Report</b>	Report Heading
3	<b>Agency Number</b>	Displays the Agency Number used in generating this report
4	<b>Run Date</b>	Date the report was generated
5	<b>Upload Date</b>	Date that the file was uploaded onto DAWeb
6	<b>Total Old Parcel Count</b>	Total count of parcels with status = <b>O</b> (Old)
7	<b>Total New Parcel Count</b>	Total count of parcels with status = <b>N</b> (New)
8	<b>File Type</b>	Direct Assessment File, Public Utility File, DA Correction, or PU Correction File
9	<b>File Name</b>	File name uploaded by agency
10	<b>ID</b>	Assessor ID number used to track parcel changes
11	<b>Parcel No</b>	Property identification number
12	<b>Format</b>	Indicates how many parcels were affected during the parcel change <ul style="list-style-type: none"> <li>• <b>M1</b> (many to one) – two or more (old + temp) parcels got converted into one new parcel.</li> <li>• <b>1M</b> (one to many) – one old parcel got converted to two or more (temp + new) parcels.</li> <li>• <b>11</b> (one to one) – one old parcel got converted to one new parcel.</li> </ul>
13	<b>Status</b>	Indicates the status of the parcel: <b>N</b> (New), <b>O</b> (Old) or <b>T</b> (Temporary) <ul style="list-style-type: none"> <li>• <b>Add</b> parcels with '<b>N</b>' status to the new roll and assign assessment amount</li> <li>• <b>Delete</b> parcels with '<b>O</b>' status for the new roll.</li> <li>• <b>Do Not Add</b> parcels with '<b>T</b>' status to the new roll</li> </ul>
14	<b>Agency Number</b>	Agency number associated with the Parcel Change Report.
15	<b>DA Amount</b>	Assessment Amount listed on the input file. New and temporary parcels have \$0.00 assessments since they were not assessed on the previous year's input file.

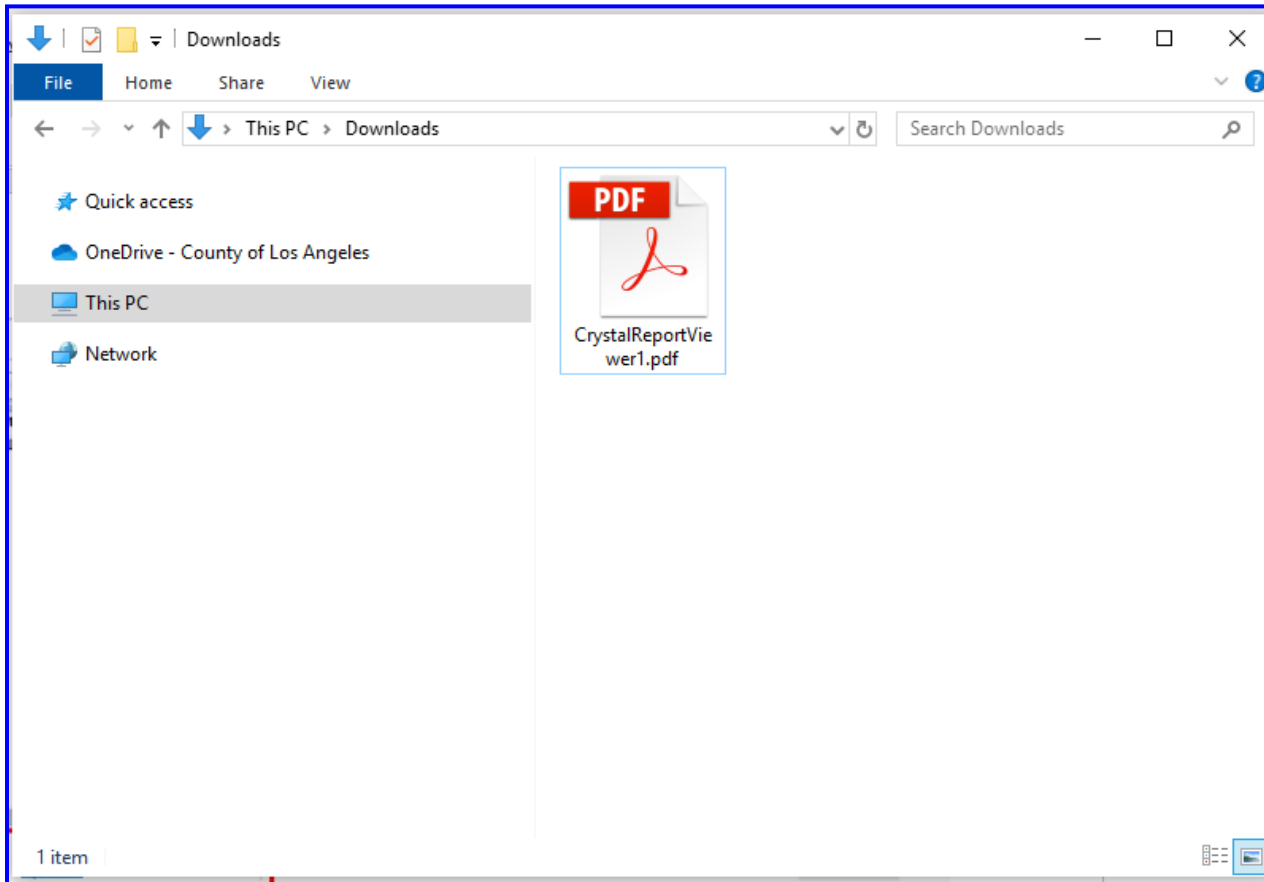
2F. To Export and Save as PDF, click the **Export icon**, select **PDF** from the File Format drop down box and click the **Export** button. To Export and Save as Excel, skip to step 2J (P. 31)



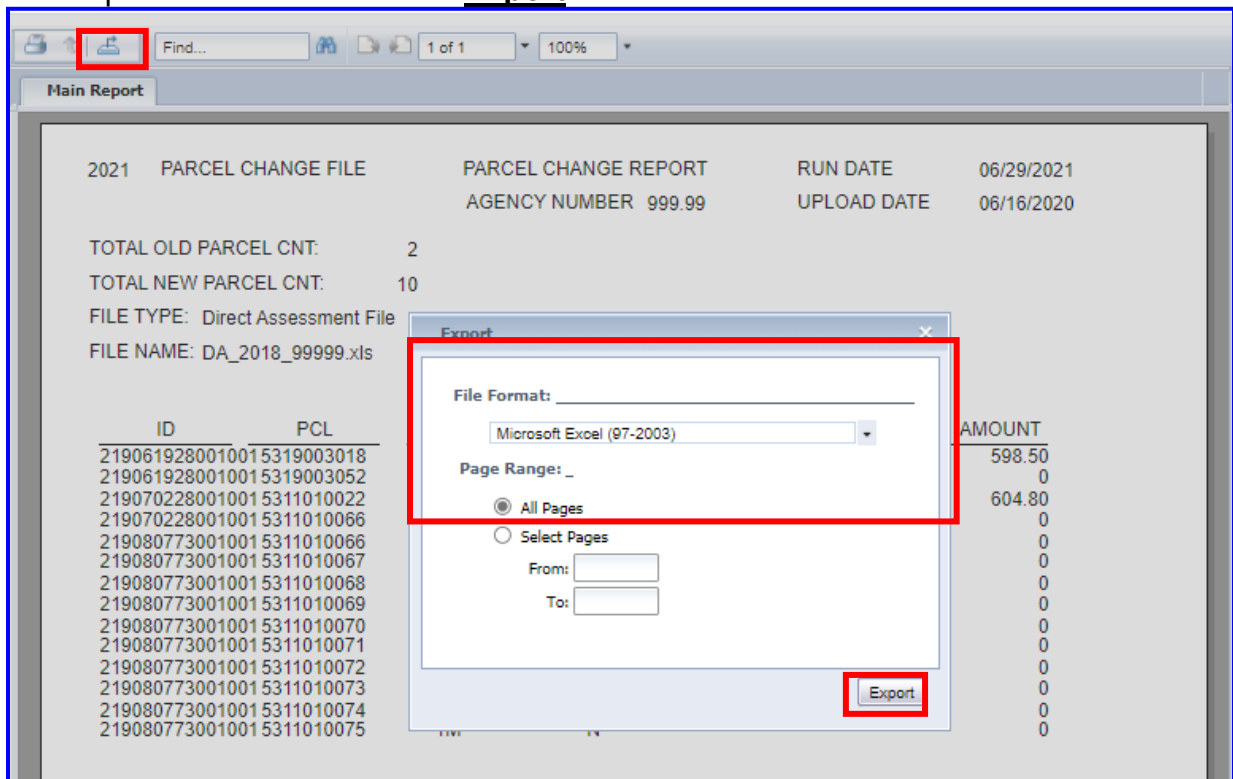
2G. File will automatically download.



2H. You can find the file in the Downloads folder.



2I. To Export and Save as **Excel**, click the **Export icon**, select **Microsoft Excel (97-2003)** from the File Format drop down box and click the **Export** button.



2J. File will automatically download.

2021 PARCEL CHANGE FILE PARCEL CHANGE REPORT RUN DATE 06/29/2021  
AGENCY NUMBER 999.99 UPLOAD DATE 06/16/2020

TOTAL OLD PARCEL CNT: 2  
TOTAL NEW PARCEL CNT: 10  
FILE TYPE: Direct Assessment File  
FILE NAME: DA\_2018\_99999.xls

ID	PCL	FORMAT	STATUS	AGENCY NUMBER	DA AMOUNT
2190619280010015319003018		11	O	999.99	598.50
2190619280010015319003052		11	N		0
2190702280010015311010022		11	O	999.99	604.80
2190702280010015311010066		11	T		0
2190807730010015311010066		1M	T		0
2190807730010015311010067		1M	N		0
2190807730010015311010068		1M	N		0
2190807730010015311010069		1M	N		0
2190807730010015311010070		1M	N		0
2190807730010015311010071		1M	N		0
2190807730010015311010072		1M	N		0
2190807730010015311010073		1M	N		0
2190807730010015311010074		1M	N		0

CrystalReportViewer1....xls  
[Open file](#)

2K. You can find the file in the Downloads folder.

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This PC > Downloads

Search Downloads

CrystalRep  
ortViewer1.  
xls

1 item



**2L.** Proceed to the following sections once all the Parcel Change Reports have been retrieved:

- **Create the Excel Input Data File (P. 33)** or
- **Create the Text Input Data File (P. 42)**

## CREATE THE EXCEL INPUT DATA FILE

### 3A. Open Microsoft Excel



### 3B. Enter the fields in the following format:

- Column **A** – **Parcel Number** – 10 digits only (**no spaces, dashes or letters**)
- Column **B** – **Assessment Amount** – maximum amount is 99,999,999.99
- Column **C** – **Agency Number** – enter one occurrence in cell C1 only

A screenshot of the Microsoft Excel interface. The title bar reads 'Book1 - Microsoft Excel'. The ribbon is set to 'Home', showing the 'Clipboard', 'Font', 'Alignment', 'Number', 'Styles', 'Cells', and 'Editing' groups. The active cell is C1, containing the value '999.99'. The spreadsheet shows a table with 11 rows and 6 columns (A-F). A red box highlights the data in columns A, B, and C for rows 1 through 10. The data in column A consists of 10-digit parcel numbers, column B shows assessment amounts, and column C shows agency numbers. The status bar at the bottom indicates 'Ready' and '100%' zoom.

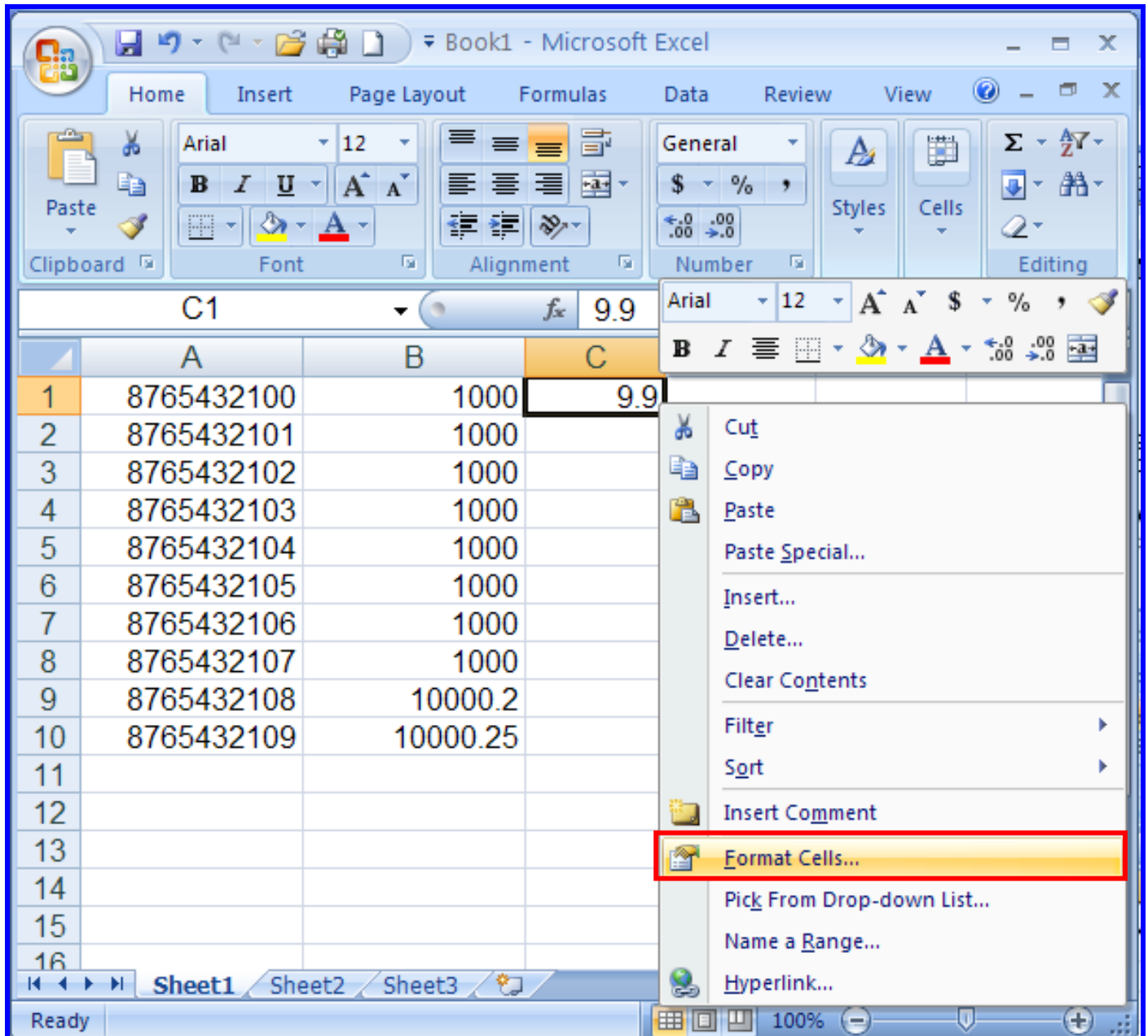
	A	B	C	D	E	F
1	8765432100	1000	999.99			
2	8765432101	1000				
3	8765432102	1000				
4	8765432103	1000				
5	8765432104	1000				
6	8765432105	1000				
7	8765432106	1000				
8	8765432107	1000				
9	8765432108	10000.2				
10	8765432109	10000.25				
11						

**NOTE:** For Agency Numbers with **leading and/or ending zeros**, cell C1 must be set to Text format before entering the agency number. This will ensure that leading and ending zeros are displayed and not cut off by Excel auto formatting. Please make sure that the Agency number is **5 digits and in 2 decimal format**.

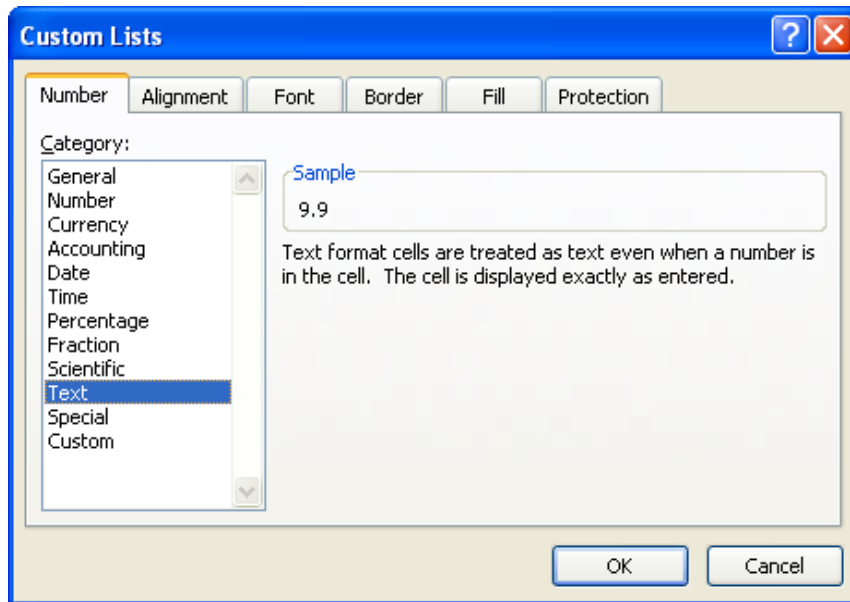
For example, **agency number 009.90 should not be displayed on the Excel file as 9.9 or 9.90** as it will **result in an invalid agency number**.

**Follow the steps below to format cell C1 to Text format:**

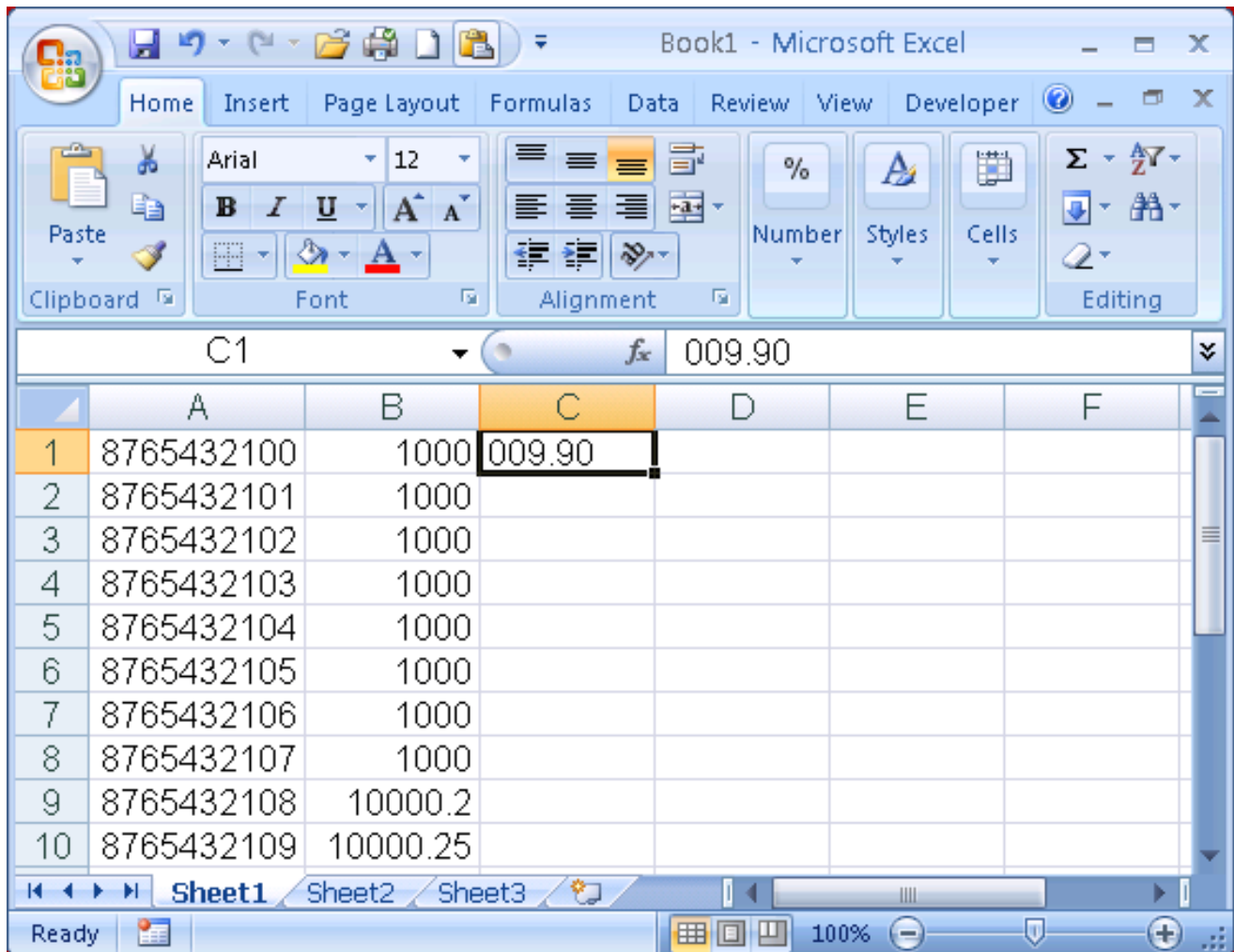
- **Right click** on cell C1 and select **Format Cells...** from the pop-up menu.



- On the Number tab under Category, select **Text** format and click the **OK** button.

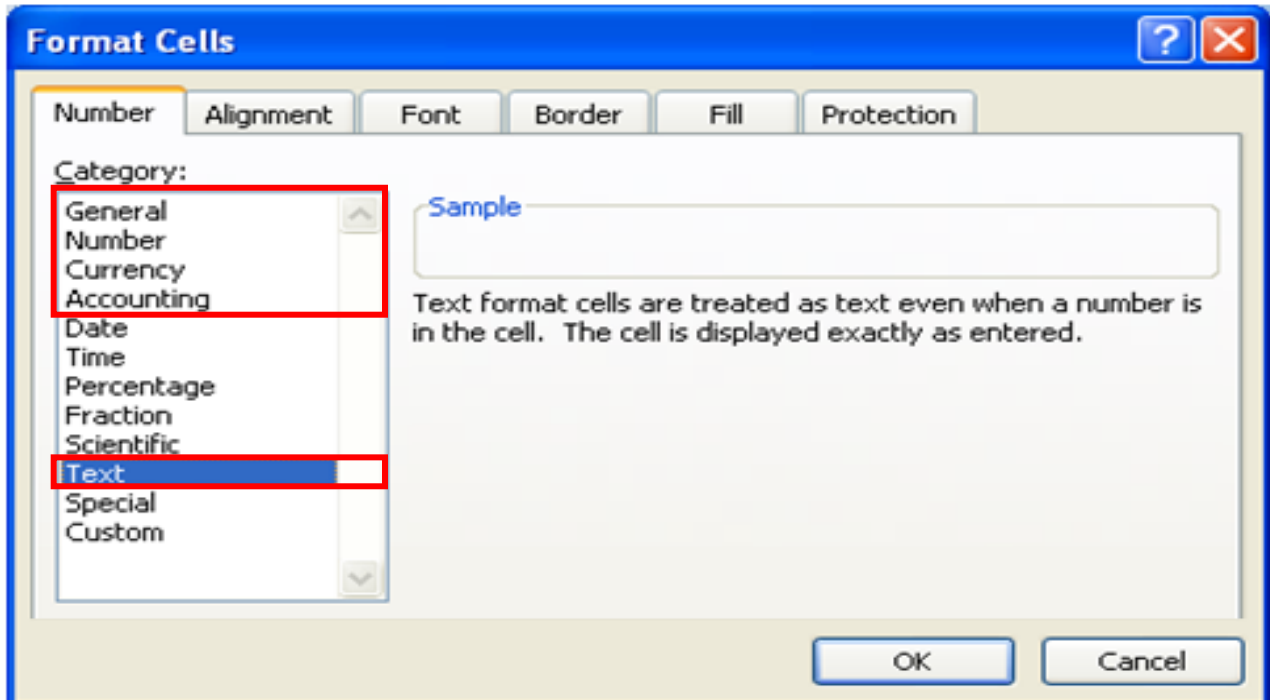


- Re-enter the agency number in cell **C1** including leading and ending zeros. **Agency number must be 5 digits and in 2 decimal format.**



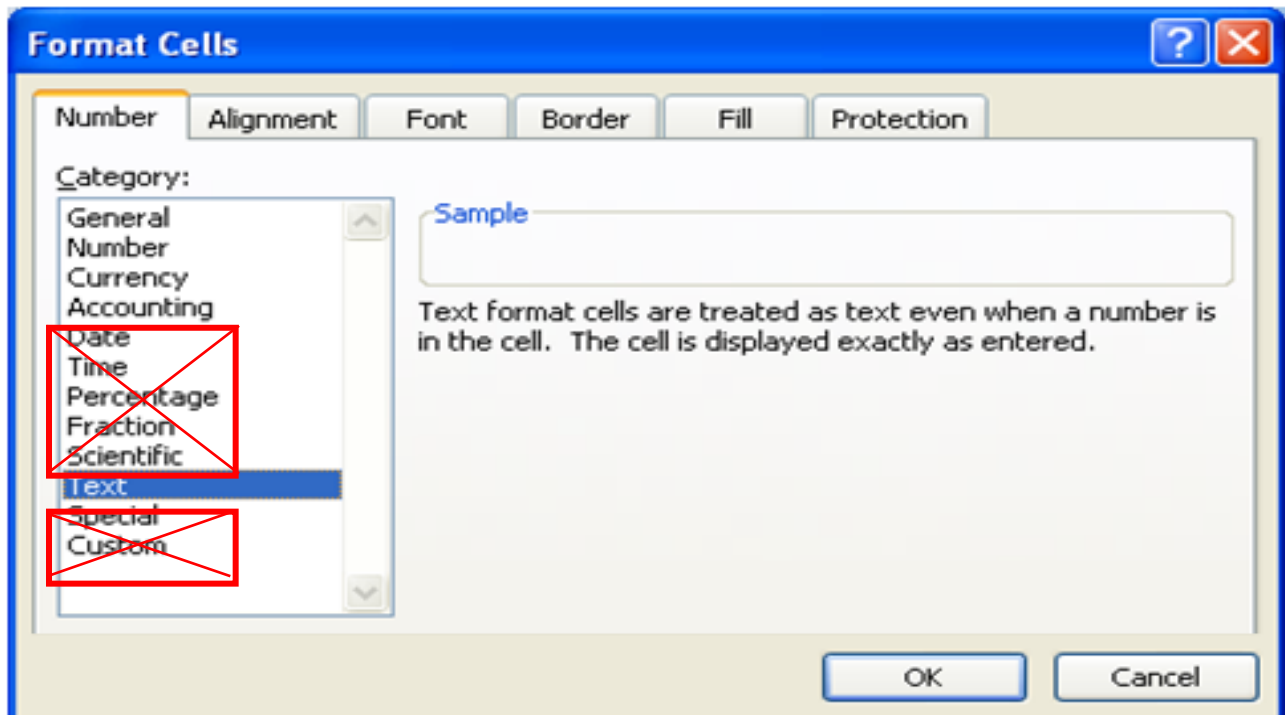
**NOTE:** The following **formats are accepted:**

- **General** – Used for Parcel Number, Assessment Amount, Agency Number
- **Number** – Used for Assessment Amount only
- **Currency** – Used for Assessment Amount only
- **Accounting** – Used for Assessment Amount only
- **Text** – Used for Agency Numbers with leading and/or ending zeros.



**NOTE:** Do not use the following formats:

- **Date, Time, Percentage, Fraction, Scientific, Special, Custom**



**NOTE: Enter the Parcel Number, Assessment Amount and Agency number only.**

Do **not** include the following:

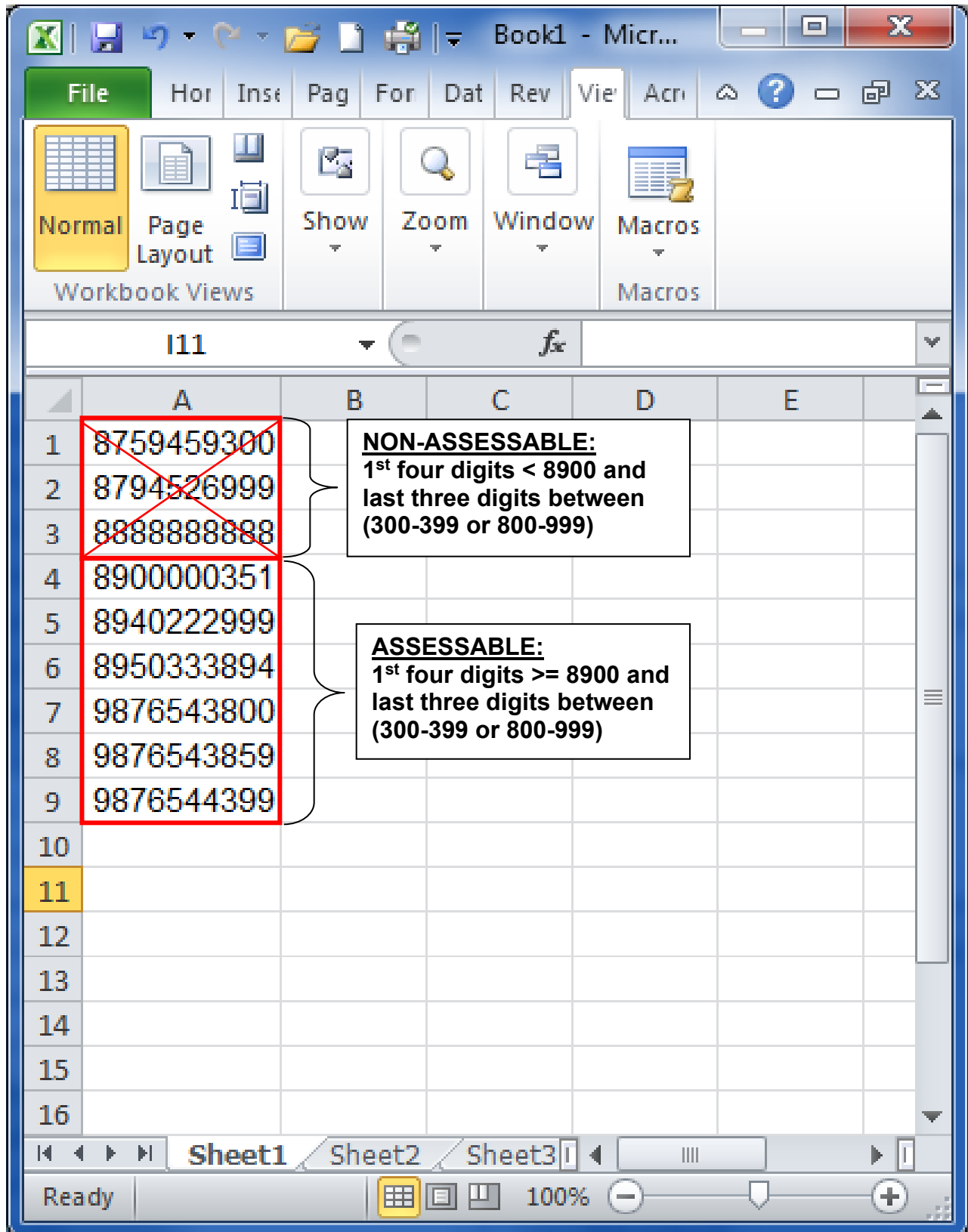
- **Headings**
- **Totals/Sum**
- **Calculated cells**
- **Hidden columns or rows**

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	F	G
1	<del>PARCEL</del>	<del>AMOUNT</del>	<del>AGENCY #</del>			
2	8765432100	1000.00	009.90			
3	8765432101	1000.00				
4	8765432102	1000.00				
5	8765432103	1000.00				
6	8765432104	1000.00				
7	8765432105	1000.00				
8	8765432106	1000.00				
9	8765432107	1000.00				
10	8765432108	10000.20				
11	8765432109	10000.25				
12	<del>TOTAL</del>	<del>28000.45</del>				
13						

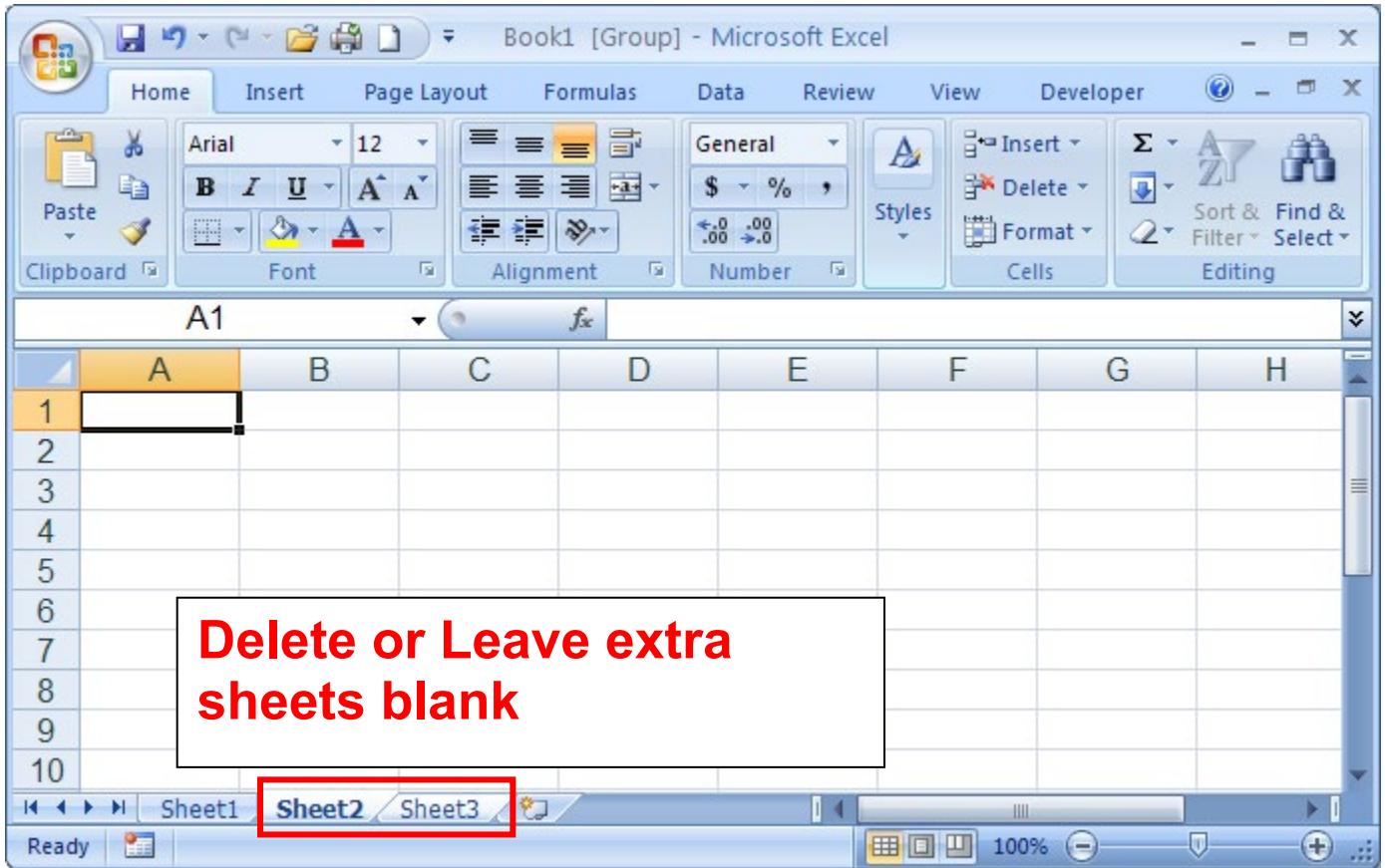
A callout box points to column E with the text: "Column 'E' should not be hidden".

**NOTE for DA, PU and COR files:** Exclude parcels where the **first four digits are less than 8900** **AND** the last three digits end between (300-399 or 800-999). These **Non-assessable** parcels are government owned, and are exempt from Direct Assessments.

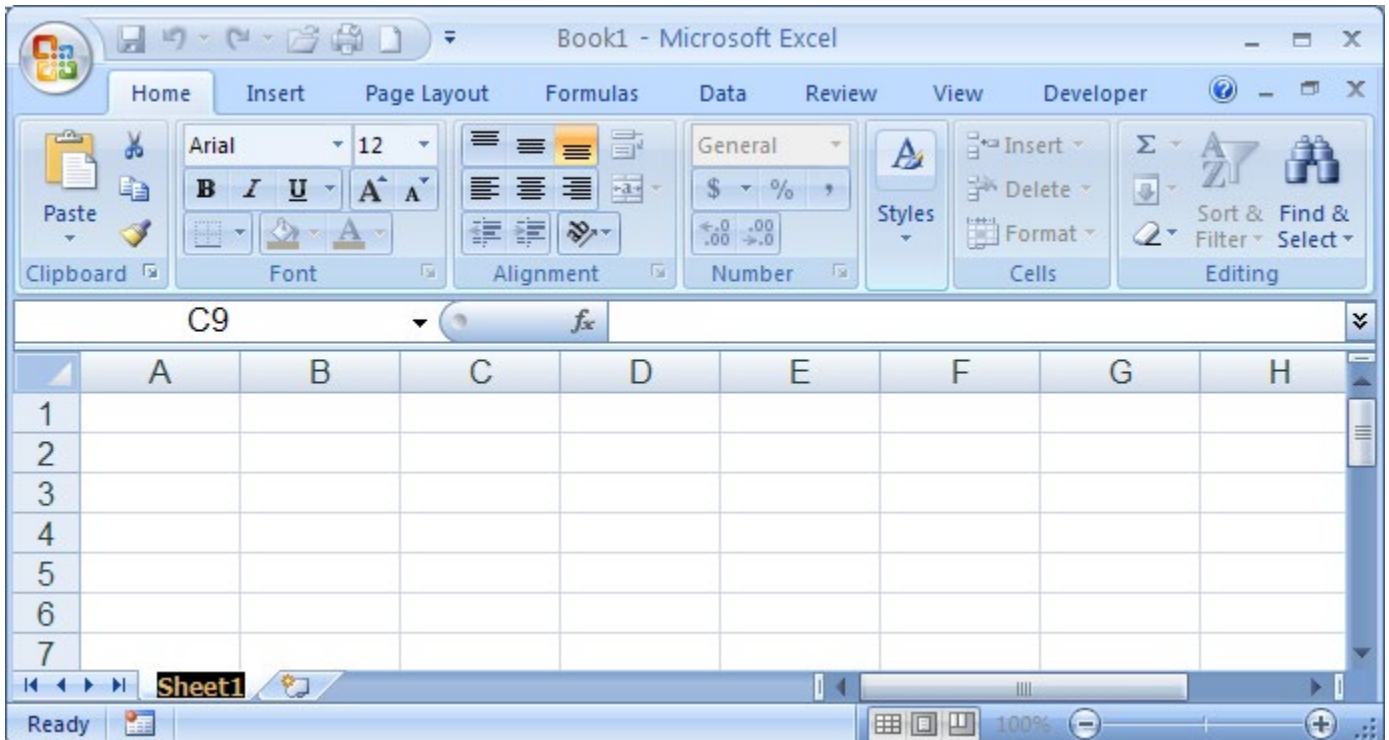




1  
**NOTE: Populate only one sheet.** The extra sheets must be deleted or left blank.



**NOTE: The tab name must be less than 17 characters or the file will not upload correctly.**





**3C.** Listed below is a **Table of the Formatting Guidelines:**

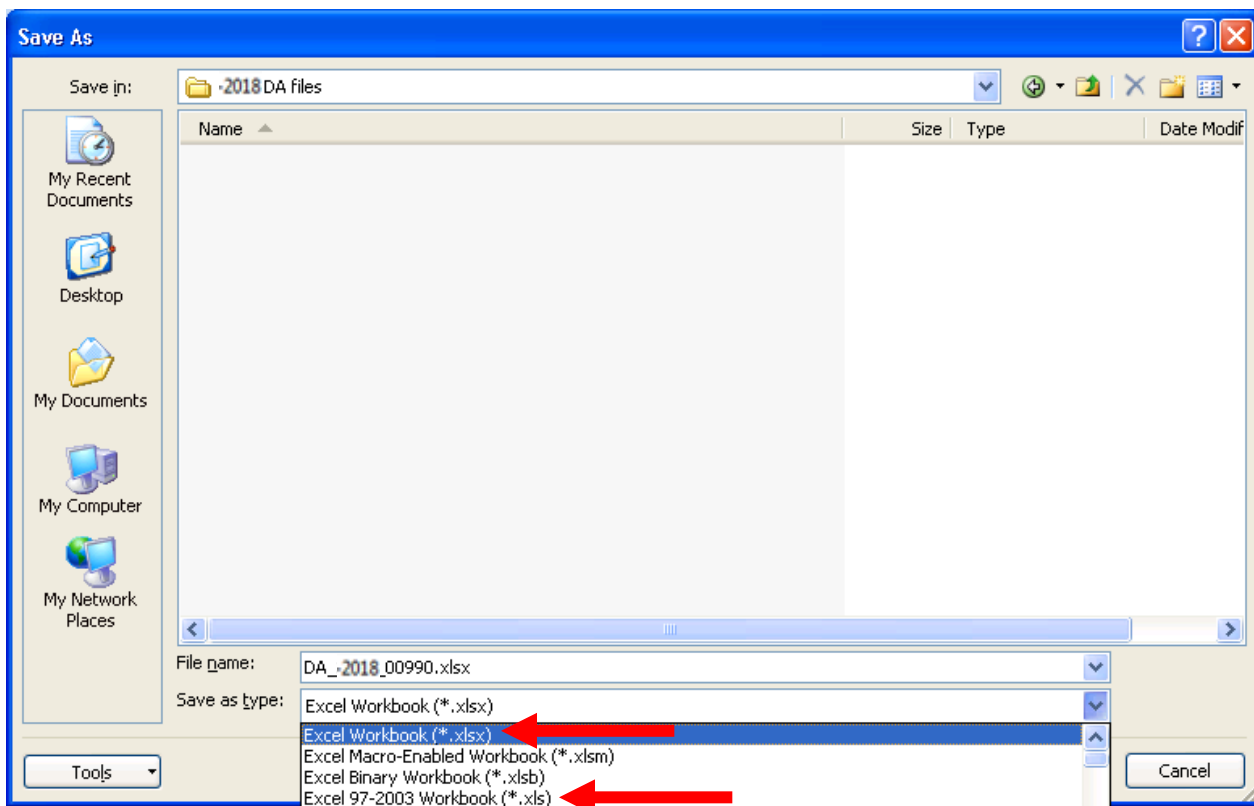
FIELD:	GUIDELINE:	EXAMPLE OF ERROR:	
<p align="center"><b>PARCEL</b></p>	<p><b>DA, PU and COR files:</b> if the first four digits of the Parcel number is less than '8900' then <b>the last 3 digits must not end in 300-399 or 800-999</b></p>	<p>5934820<b>883</b> 8584827<b>999</b></p>	
	<p><b>DA Exempt Parcel file:</b> the <b>first four digits of the Parcel number must be less than '8900'</b> and <b>the last 3 digits must end in 300-399 or 800-999</b></p>	<p>5934820<b>543</b> 8584827<b>450</b></p>	
	<p>Must be <b>10 digits long</b></p>	<p>876543210 (9 digits) 87654321089 (11+ digits)</p>	
	<p>Must be <b>all numeric</b> (No spaces, dashes, letters or special characters such as \$,&amp;,%*,!,#, @, etc.)</p>	<p>8765 432 100 8765-432-100 8765432<b>K</b>00 8765%32100 876543210<b>@</b></p>	
	<p>Must not contain <b>duplicate</b> parcels</p>	<p>8765432100 8765432100</p>	
	<p>Direct Assessment Parcels <b>must not</b> start with '9'</p>	<p><b>9</b>876543210</p>	
	<p>Public Utility Parcels <b>must</b> start with '9'</p>	<p><b>8</b>765432100</p>	
	<p align="center"><b>ASSESSMENT AMOUNT</b></p>	<p>Must not exceed <b>99,999,999.99</b></p>	<p><b>1</b>23,456,789.01</p>
<p>Must be <b>all numeric</b> (No letters or special characters such as \$,&amp;,%*,!,#, @, etc.)</p>		<p>1,234.5<b>H</b> <b>\$</b>1234.50 1234.50* 12<b>&amp;</b>4.50</p>	
<p>Must be <b>positive</b> amount</p>		<p>-1234.50</p>	
<p>Must not be more <b>than two decimal format</b></p>		<p>1,234.56<b>7</b></p>	
<p><b>DA and PU files</b> must not contain <b>\$0</b> assessment amount</p>		<p>0.00 or 0 <b>not accepted</b></p>	
<p><b>DA Exempt Parcel and Correction files</b> can have <b>\$0</b> assessment amount</p>		<p>\$0 DA or PU amount</p>	
<p align="center"><b>AGENCY NUMBER</b></p>		<p>Must be entered in <b>cell C1 on the Excel file</b></p>	
	<p>Must be in <b>two decimal format (XXX.XX)</b></p>	<p>9999.9 99.999 9.9999 .99999</p>	
	<p align="center"><b>AGENCY NUMBER</b></p>	<p>Must be <b>five digits</b></p>	<p>9999</p>

		999.9
		9.999
		99.9
	Must be <b>all numeric</b> (No letters or special characters such as \$,&,%,* !, #, @, etc.)	99 <b>F</b> .99

**3D.** Save and name the Excel file with the following **file naming convention**:

<b>File Type:</b>	<b>Naming Convention:</b>	<b>Notes:</b>
Direct Assessment	<b>DA_20YY_XXXX</b>	YY = Fiscal Year, <b>XXXX</b> = Agency #
Public Utility	<b>PU_20YY_XXXX</b>	YY = Fiscal Year, <b>XXXX</b> = Agency #
Correction (DA or PU)	<b>COR1_20YY_XXXX</b> <b>COR2_20YY_XXXX</b> <b>COR3_20YY_XXXX</b> <b>COR4_20YY_XXXX</b>	YY = Fiscal Year, <b>XXXX</b> = Agency #
Exempt Parcels	<b>EXEMPT_20YY_XXXX</b>	YY = Fiscal Year, <b>XXXX</b> = Agency #

**NOTE:** **'Save as type:'** can be either **Excel 2010 or 2007 Workbook (\*.xlsx)** or **Excel 97-2003 Workbook (\*.xls)**

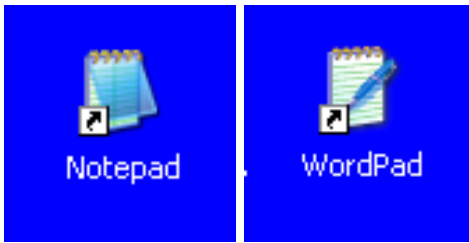


**3E.** Proceed to the following sections after the files have been formatted and saved.

- **Upload Original Direct Assessment and Public Utility Files (P. 46)**
- **Upload Correction File and Correction Data Transmittal (P. 100)**

## CREATE THE TEXT INPUT DATA FILE

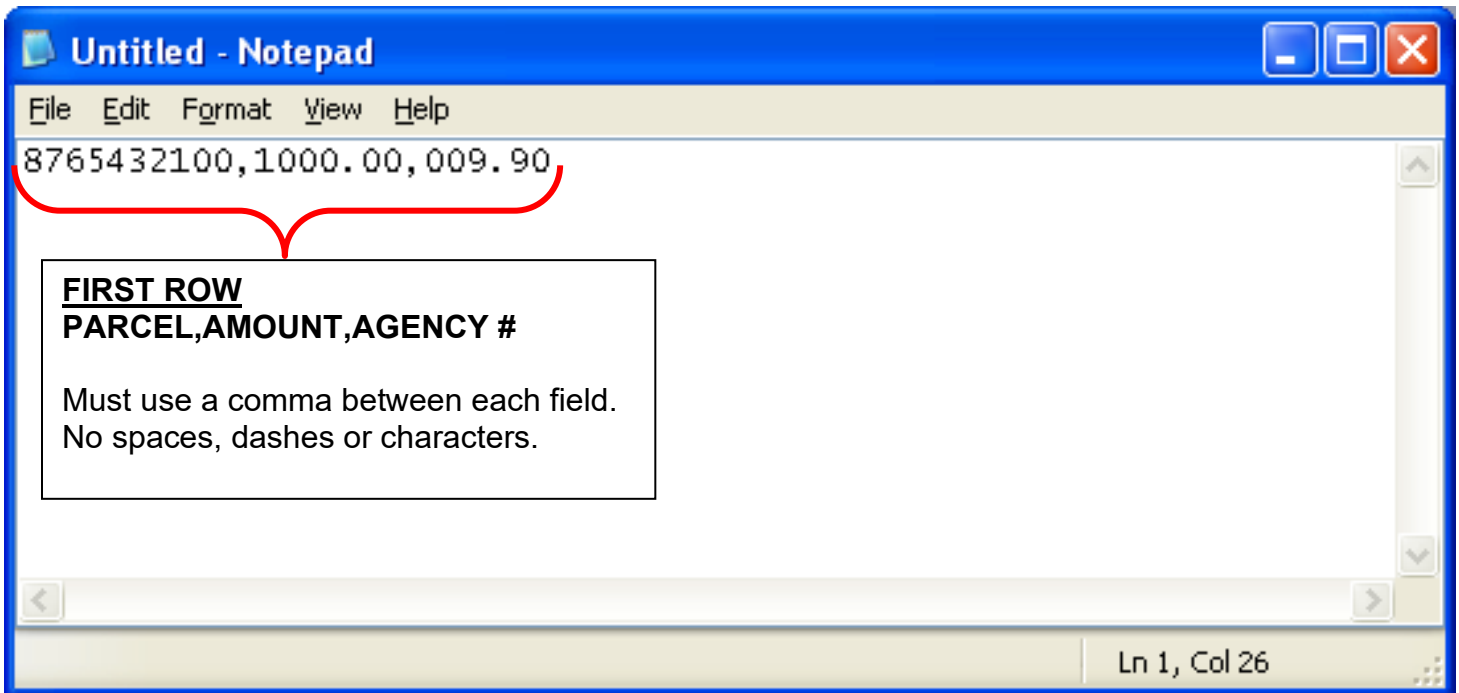
### 4A. Open Notepad or WordPad



### 4B. Enter the following fields on the first row:

- **Parcel Number** – 10 digits only (no spaces, dashes or letters)
- **Assessment Amount** – max is 99,999,999.99
- **Agency Number** – enter one occurrence in row 1 only. Must be 5 digits and in 2 decimal format.

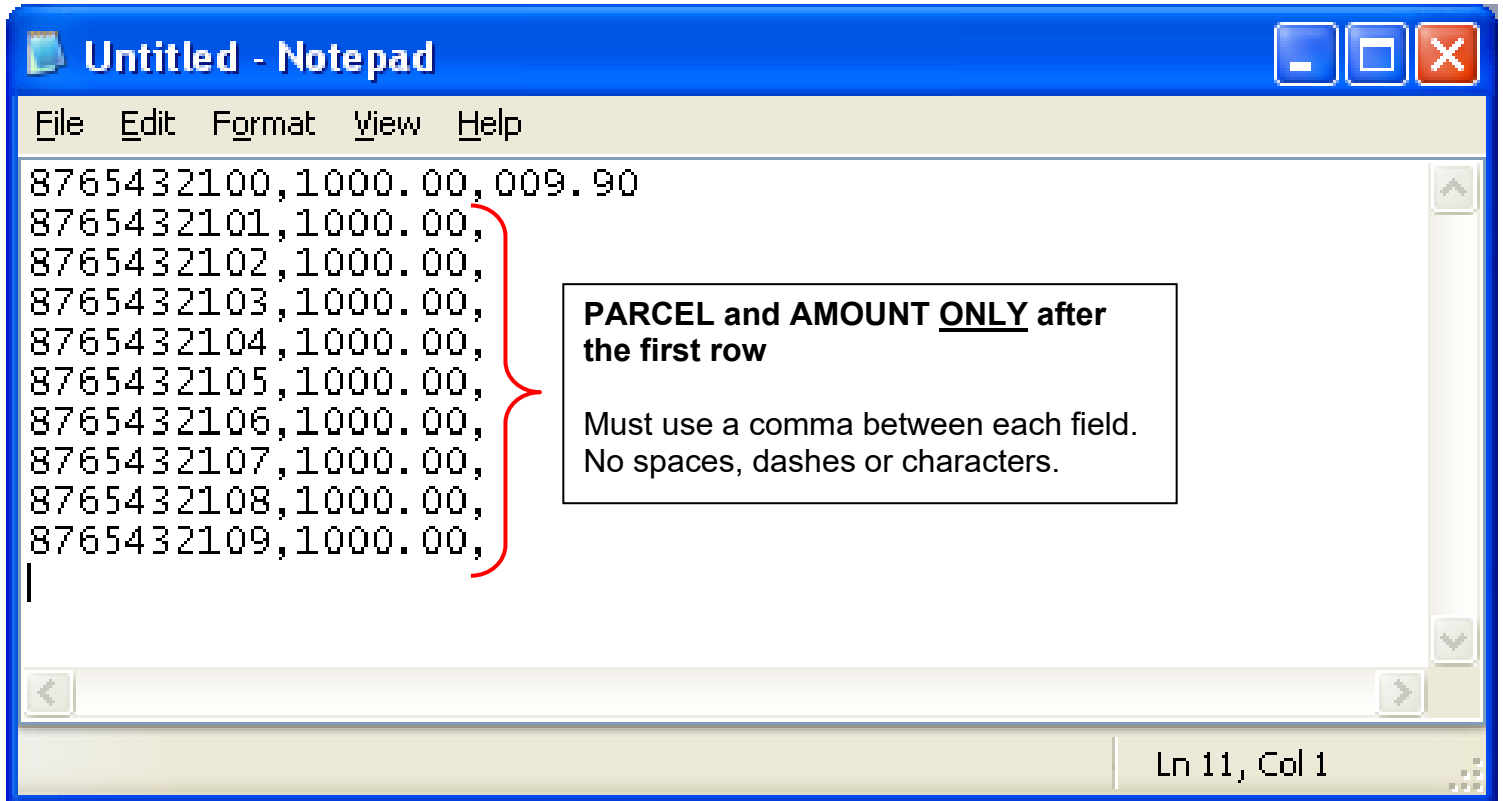
**NOTE: Must use a comma between each field. Use commas only.** Also, do **not** use any spaces, letters, dashes or special symbols or characters (!, @, #, \$, %, ^, &, \*, etc)



4C. Enter the following fields after the first row:

- **Parcel Number** – 10 digits only (no spaces, dashes or letters)
- **Assessment Amount** – max is 99,999,999.99
- **Do not enter Agency Number after the first row.**

**NOTE: Must use a comma between each field. Use commas only.** Also, do **not** use any spaces, letters, dashes or special symbols or characters (!, @, #, \$, %, ^, &, \*, etc)



4D. Listed below is a **Table of Formatting Guidelines:**

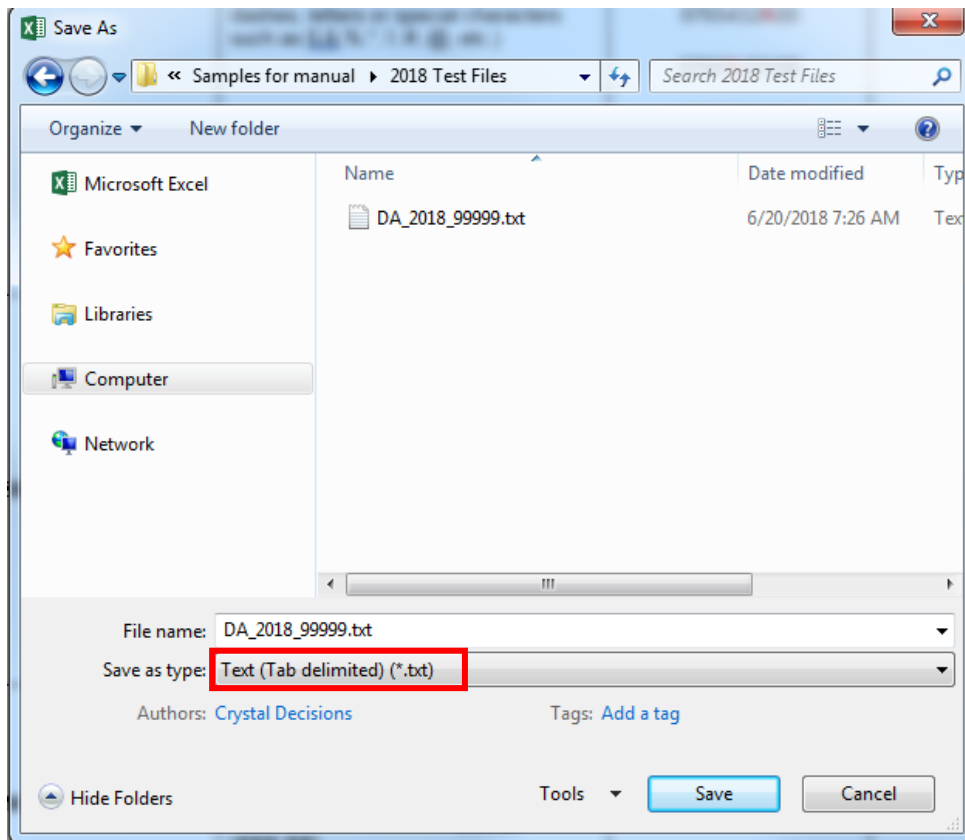
FIELD:	GUIDELINE:	EXAMPLE OF ERROR:	
<p align="center"><b>PARCEL</b></p>	<p><b>DA, PU and COR files:</b> if the first four digits of the Parcel number is less than '8900' then <b>the last 3 digits must not end in 300-399 or 800-999.</b></p>	<p>5934820<b>883</b> 8584827<b>999</b></p>	
	<p><b>DA Exempt Parcel file:</b> the <b>first four digits of the Parcel number must be less than '8900'</b> and <b>the last 3 digits must end in 300-399 or 800-999.</b></p>	<p>5934820<b>543</b> 8584827<b>450</b></p>	
	<p>Must be <b>10 digits long</b></p>	<p>876543210 (9 digits) 87654321089 (11+ digits)</p>	
	<p>Must be <b>all numeric</b> (No spaces, dashes, letters or special characters such as \$,&amp;,%*,!,#, @, etc.)</p>	<p>8765 432 100 8765-432-100 8765432<b>K</b>00 8765%32100 876543210<b>@</b></p>	
	<p>Must not contain <b>duplicate</b> parcels</p>	<p>8765432100 8765432100</p>	
	<p>Direct Assessment Parcels <b>must not</b> start with '9'</p>	<p><b>9</b>876543210</p>	
	<p>Public Utility Parcels <b>must</b> start with '9'</p>	<p><b>8</b>765432100</p>	
	<p align="center"><b>ASSESSMENT AMOUNT</b></p>	<p>Must not exceed <b>99,999,999.99</b></p>	<p><b>1</b>23,456,789.01</p>
<p>Must be <b>all numeric</b> (No letters or special characters such as \$,&amp;,%*,!,#, @, etc.)</p>		<p>1,234.5<b>H</b> <b>\$</b>1234.50 1234.50* 12<b>&amp;</b>4.50</p>	
<p>Must be <b>positive</b> amount</p>		<p>-1234.50</p>	
<p>Must not be more <b>than two decimal format</b></p>		<p>1,234.56<b>7</b></p>	
<p><b>DA and PU files</b> must not contain <b>\$0</b> assessment amount</p>		<p>0.00 or 0 <b>not accepted</b></p>	
<p><b>DA Exempt Parcel and Correction files</b> can have <b>\$0</b> assessment amount</p>		<p>\$0 DA or PU amount</p>	
<p align="center"><b>AGENCY NUMBER</b></p>		<p>Must be entered in <b>cell C1 on the Excel file</b></p>	<p>9999.9</p>
	<p>Must be in <b>two decimal format (XXX.XX)</b></p>	<p>99.999 9.9999 .99999</p>	
	<p align="center"><b>AGENCY NUMBER</b></p>	<p>Must be <b>five digits</b></p>	<p>9999</p>

		999.9
		9.999
		99.9
	Must be <b>all numeric</b> (No letters or special characters such as \$,&,%,* !, #, @, etc.)	99 <b>F</b> .99

4E. Save and name the Text file with the following **file naming convention**:

File Type:	Naming Convention:	Notes:
Direct Assessment	<b>DA_20YY_XXXXX</b>	YY = Fiscal Year, <b>XXXXX</b> = Agency #
Public Utility	<b>PU_20YY_XXXXX</b>	YY = Fiscal Year, <b>XXXXX</b> = Agency #
Correction (DA or PU)	<b>COR1_20YY_XXXXX</b> <b>COR2_20YY_XXXXX</b> <b>COR3_20YY_XXXXX</b> <b>COR4_20YY_XXXXX</b>	YY = Fiscal Year, <b>XXXXX</b> = Agency #
Exempt Parcels	<b>EXEMPT_20YY_XXXXX</b>	YY = Fiscal Year, <b>XXXXX</b> = Agency #

**NOTE:** 'Save as type:' should be Text Documents (\*.txt) and click the **Save** button.



4F. Proceed to the following sections after the files have been formatted and saved.

- **Upload Original Direct Assessment and Public Utility Files (P. 46)**
- **Upload Correction File and Correction Data Transmittal (P. 100)**

# UPLOAD ORIGINAL DIRECT ASSESSMENT AND PUBLIC UTILITY FILES

**Important Message:** Before Direct Assessment or Public Utility files can be uploaded, an Agency Information Sheet must be completed. Refer to 'Create Agency Information Sheet Form' (P. 11).

5A. To upload a file, click the Upload File tab.



The screenshot shows the DAWeb Auditor-Controller interface. The header includes the County of Los Angeles logo, the 'DAWeb Auditor-Controller' title, and the version 'v 2.3.3.4'. A navigation bar contains tabs: 'Inbox', 'Exempt Parcels', 'Upload File' (highlighted with a red box), 'Document Management', 'Upload Document', and 'Create AIS Form'. Below the navigation bar, the 'Inbox' section displays a note: 'NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file'. There are buttons for 'Open Search Panel', 'Submit', and 'Refresh'. A table with columns for 'Fiscal Year', 'Agency #', 'File Type', 'TXN Count', 'Total DA AMT', 'Valid', 'Status', 'Upload Date', 'Submit Date', 'Docs', 'Report', and 'Action' is shown, with the message 'There are no records available.' below it. The interface also includes pagination controls and a 'Records per page' dropdown set to 100.

5B. Perform the following upload steps:

1. **Select the type of file** to upload.
2. **Enter Agency number** to upload. Agency number must be 5 digits and in 2 decimal format.
3. Click the Validate button and steps 4 and 5 will appear.



The screenshot shows the 'Upload File' section of the DAWeb Auditor-Controller interface. The header includes the County of Los Angeles logo, the 'DAWeb Auditor-Controller' title, and the version 'v 2.4.0.0'. A navigation bar contains tabs: 'Inbox', 'Exempt Parcels', 'Upload File' (highlighted with a red box), 'Document Management', 'Upload Document', 'Create AIS Form', 'Report', 'FTP', 'Administration', and 'E-Mail'. Below the navigation bar, the 'Upload File' section displays the following steps:

1. **Select File Type:** (highlighted with a red box)
  - Direct Assessment File
  - Public Utility File
  - Correction Direct Assessment File
  - Correction Public Utility File
  - Exempt Parcels File
2. **Enter agency number to upload:** (highlighted with a red box)  
Must be 5 digits and in 2 decimal format (xxx.xx)
3. **Validate agency number:** (highlighted with a red box)

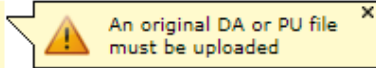
**NOTE: An original Direct Assessment or Public Utility file must be uploaded before a Correction file can be uploaded for the same agency number. To upload a correction file, go to 'Upload Correction File and Correction Data Transmittal' section (P. 100).**



## Upload File

### 1. Select File Type:

- Direct Assessment File
- Public Utility File
- Correction Direct Assessment File
- Correction Public Utility File
- Exempt Parcels File



### 2. Enter agency number to upload:

999.99

Must be 5 digits and in 2 decimal format (xxx.xx)

### 3. Validate agency number:

Validate

**5C.** Click the **Browse** button in step 4, select a file to upload and click the **open** button or double-click on a file to upload.

The screenshot shows the DAWeb 'Upload File' interface with a Windows File Explorer window open. The File Explorer window is titled 'Open' and shows the path 'Samples f... > 2018 Test Files'. The file list includes:

Name	Date modified
File with Errors	6/25/2018 3:4
2018_999.99_Public_Utility_File.csv	6/21/2018 9:0
COR_99999.xlsx	2/15/2018 10:
DA_2018_99999.txt	6/20/2018 7:2
<b>DA_2018_99999.xls</b>	6/25/2018 3:5
PU_2018_99999.xls	6/25/2018 9:3

The 'Browse' button in the DAWeb interface is highlighted with a red box. The 'Open' button in the File Explorer window is also highlighted with a red box.



5D. Move the cursor over the white file area to display the file name. If the file name is correct, then click the **Upload** button in step 5.

**Upload File**

1. Select File Type:

- Direct Assessment File
- Public Utility File
- Correction Direct Assessment File
- Correction Public Utility File
- Exempt Parcels File

2. Enter agency number to upload:  
999.99  
Must be 5 digits and in 2 decimal format (xxx.xx)

3. Validate agency number:  
Validate

4. Select File to upload:  
DA\_2018\_99999.xls   
351.50kB

5. Press upload:  
(Note: Press on Reset to choose a new file type and agency number)

5E. A message will pop up under the Upload button after the file loaded successfully. To load additional file(s), repeat steps 5B to 5E.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

**Upload File**

1. Select File Type:

- Direct Assessment File
- Public Utility File
- Correction Direct Assessment File
- Correction Public Utility File
- Exempt Parcels File

2. Enter agency number to upload:  
  
Must be 5 digits and in 2 decimal format (xxx.xx)

3. Validate agency number:  
Validate

Successfully uploaded files:  
DA\_2018\_99999.xls

5F. To upload a Public Utility File, select Public Utility file in step 1 and repeat steps 5C to 5E.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

## Upload File

1. Select File Type:

- Direct Assessment File
- Public Utility File
- Correction Direct Assessment File
- Correction Public Utility File
- Exempt Parcels File

2. Enter agency number to upload:

999.99

Must be 5 digits and in 2 decimal format (xxx.xx)

3. Validate agency number:

Validate

**NOTE:** If the Agency Number entered on the Upload page **does not match** the Agency Number on the uploaded file, then a pop-up message will ask you to **select the correct Agency Number**.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

## Upload File

1. Select File Type:

- Direct Assessment File
- Public Utility File
- Correction Direct Assessment File
- Correction Public Utility File
- Exempt Parcels File

2. Enter agency number to upload:

999.99

Must be 5 digits and in 2 decimal format

3. Validate agency number:

Validate

4. Select File to upload:

[ no files selected ] Browse

5. Press upload:

(Note: Press on Reset to choose a new file type and agency number)

Upload Reset

The agency number on uploaded file does not match with input. Please select an agency number:

You entered: 999.99

On file: 999.90

Select Cancel

**NOTE:** If the uploaded file contains an **invalid Agency number** that you do not have access to, the **invalid Agency number cannot be selected** and the pop-up message will state that **'You do not have access to this Agency number'**.

- If both Agency numbers are incorrect, then click **Cancel** and **repeat steps 5B to 5E**.

**Upload File**

1. **Select File Type:**

- Direct Assessment File
- Public Utility File
- Correction Direct Assessment File
- Correction Public Utility File
- Exempt Parcels File

2. **Enter agency number to upload:**

999.99

Must be 5 digits and in 2 decimal format (xxx.xx)

3. **Validate agency number:**

Validate

4. **Select File to upload:**

[ no files selected ]

5. **Press upload:**

(Note: Press on Reset to choose a new file type and)

Upload Reset

The agency number on uploaded file does not match with input. Please select an agency number:

You entered: 999.99

On file: 888.88

- You do not have access to this AGENCY number

Select Cancel

**5G.** To view the uploaded file, click the **Inbox** tab.

**Inbox** Exempt Parcels Upload File Document Management Upload Document Create AIS Form

**Upload File**

1. **Select File Type:**

- Direct Assessment File
- Public Utility File
- Correction Direct Assessment File
- Correction Public Utility File
- Exempt Parcels File

2. **Enter agency number to upload:**

999.99

Must be 5 digits and in 2 decimal format (xxx.xx)

3. **Validate agency number:**

Validate

Successfully uploaded files:  
PU\_2018\_99999.xls

5H. Shown below is a sample of the **Inbox**.

**NOTE:** Listed below are **descriptions of the Inbox fields**. **Fields #1 to 9 can be sorted by clicking on each column header**. Ascending order sort is indicated by ▲. Click the same field again for descending order sort ▼. The example above is sorted by Upload Date.

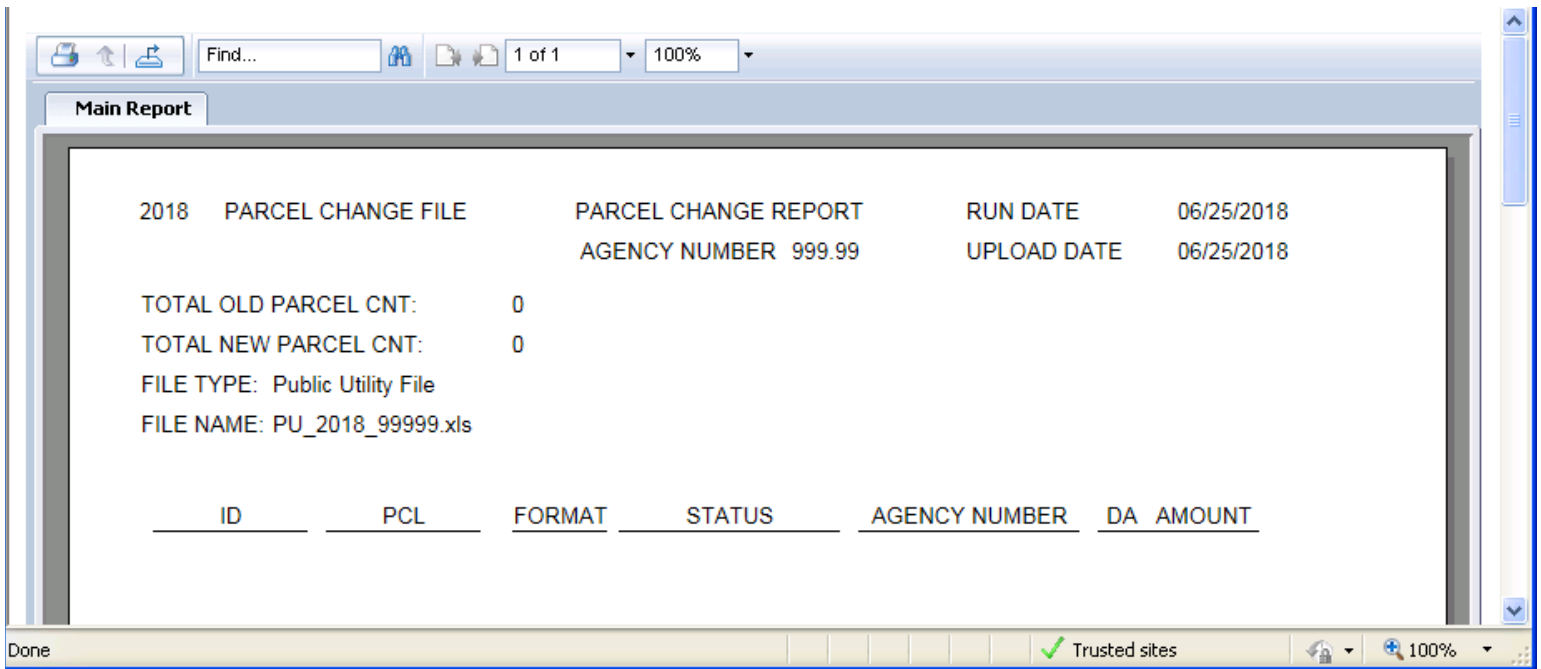
1	<b>Fiscal Year</b>	Fiscal Year that the Agency Number was processed.
2	<b>Agency #</b>	Direct Assessment Agency Number assigned to each agency by the Auditor-Controller.
3	<b>File Type</b>	File Type submitted for STR processing. 4 file types: <b>Direct Assessment (DA), Public Utility (PU), DA Correction, and PU Correction (COR version)</b> files.
4	<b>TXN Count</b>	Total transaction count on the input file
5	<b>Total DA AMT</b>	Total assessment amount on the input file
6	<b>Valid</b>	Indicates if the file submitted is valid (Valid = 'yes') or invalid (Valid = 'no'). Invalid files must be fixed before proceeding.
7	<b>Status</b>	Tracks the progress of the agency number throughout the DA process.
8	<b>Upload Date</b>	Indicates the date the file was uploaded to DAWeb
9	<b>Submit Date</b>	Indicates the date the file was submitted in DAWeb
10	<b>Docs</b>	The number of legal documents uploaded by an agency ( <b>ie: Resolution, Agency Information Sheet, Billing Agreement, and Data Transmittal</b> ).
11	<b>Report</b>	<b>PCL CHG RPT:</b> Generates the Parcel Change Report by clicking on the link. <b>Data Transmittal:</b> Generates the Data Transmittal by clicking on the link. <b>History:</b> Shows the status of the agency number throughout the DA process. <b>Detail RPT:</b> Generates the Detail Report by clicking on the link. <b>Exception Report:</b> Links to Exceptions Webpage that shows Invalid Parcels that need to be corrected and resubmitted
12	<b>ACTION</b>	<b>Check In / Check Out:</b> <b>Check In</b> allows other users with access to the same Agency number to access, edit, delete or submit the file. <b>Check out</b> allows a user to lock the file and keep other users with access to the file from accessing, editing, deleting or submitting the file. <b>Edit:</b> Click the 'Edit' link to correct errors in the Edit mode. <b>Delete:</b> Click the 'Delete' link to delete the file from the Inbox.

5I. The example shows the Inbox with **Fiscal Year (2018)**, **Agency number (999.99)**, **File Type (DA and PU)** and **Status (Work in Progress)**. One file is not valid (Valid = 'no') and one is valid (Valid = 'yes'). If Valid = 'no' then proceed to **'Correct the Data File in Edit Mode'** section (P. 66). Proceed to the next step if Valid = 'yes'.

**NOTE:** The Parcel Change Report AND Data Transmittal links are disabled when **VALID = 'no'**.

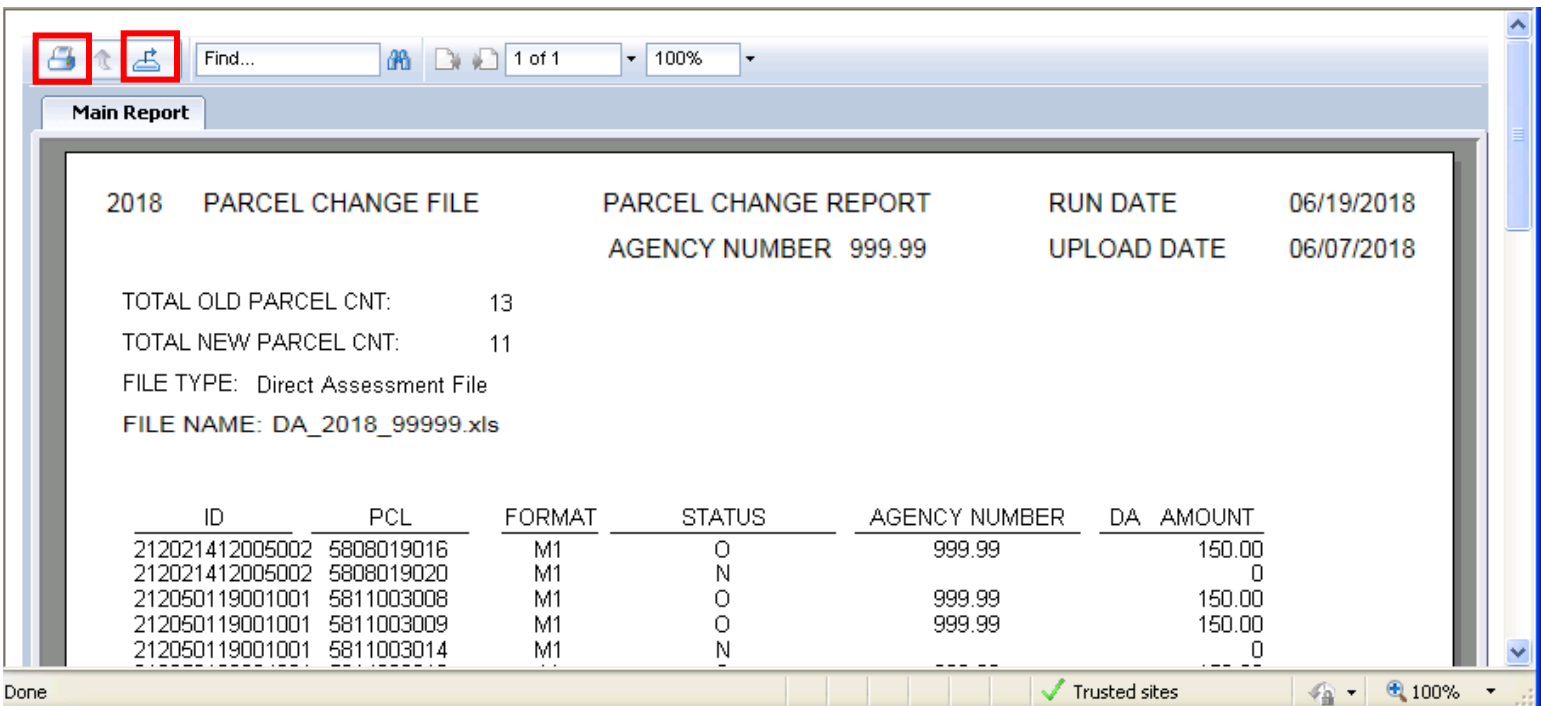
5J. For the **valid** file, click the **PCL CHG RPT** link under the Report column to retrieve the Parcel Change Report. The report can be exported to PDF or Excel.

**5K. Blank Parcel Change Report** means that there are no parcel changes for the selected file.



**NOTE: Print or Export the Parcel Change Report if it is **not blank** and proceed with the following options:**

<ul style="list-style-type: none"> <li>Delete the current file from the Inbox and upload new file with parcel changes included in the file</li> </ul>	Go to ' <b>Create the Excel File Input</b> ' (P.33) OR <b>Create the Text File Input</b> ' (P. 42)
<ul style="list-style-type: none"> <li>Add new parcels and delete old parcels in Edit mode</li> </ul>	Go to ' <b>Correct a File in Edit Mode</b> ' (P. 66)
<ul style="list-style-type: none"> <li>Complete Upload Original DA file process AND</li> <li>Submit parcel changes as corrections</li> </ul>	Go to ' <b>Upload Correction File and Correction Data Transmittal</b> ' (P.100)



5L. Click the **History/Detail Report** link under the **Report** column to see the parcel and amount detail in the uploaded file. The **Detail Report can be exported as .csv file for accounts with 150,000 transactions or less.**

**NOTE: Contact the DA Unit if you need to export a file larger than 150,000 transactions.**

Options | Log Out | Help

DAWeb Auditor-Controller v 2.4.0.0 Welcome, Test User

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

**Inbox** NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file

Open Search Panel Submit Refresh

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action	
<input type="checkbox"/>	2018	999.99	DA	6,115	\$152,491,347.89	no		06/25/2018		3	<a href="#">History/Detail Report</a> PCL CHG RPT Data Transmittal Exception Report	Edit Check In Delete
<input type="checkbox"/>	2018	999.99	PU	1,385	\$1,809,275.89	yes		06/25/2018	08/23/2018	3	<a href="#">History/Detail Report</a> PCL CHG RPT Data Transmittal Exception Report	Edit Check Out Delete

Records per page: 100

5M. The **File History** tracks and logs the status of the file as it goes through the Direct Assessment process. The **Detail Report** is a copy of the file uploaded by the agency. The **Comment** column displays error messages for parcel numbers and/or amounts that are incorrectly formatted.

To export the Detail Report as .csv file, click the **Export Transactions to File** button.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

## File History/Detail Report

Back

Fiscal Year 2018  
 Agency Number 999.99  
 File Type Direct Assessment File  
 File Name DA\_2018\_99999.xls

### File History

History	Updated By	Updated Date
File has been uploaded	User, Agency	06/25/2018

Records: 1 - 1 of 1

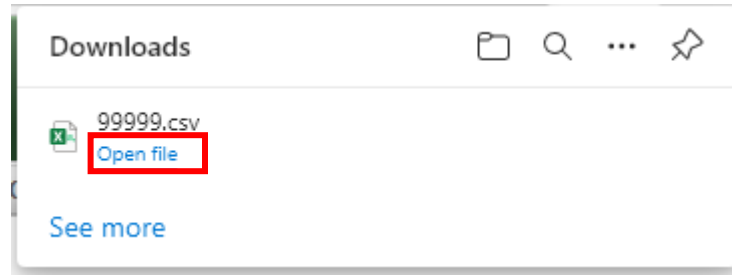
### Detail Report

[Export Transactions to File](#)

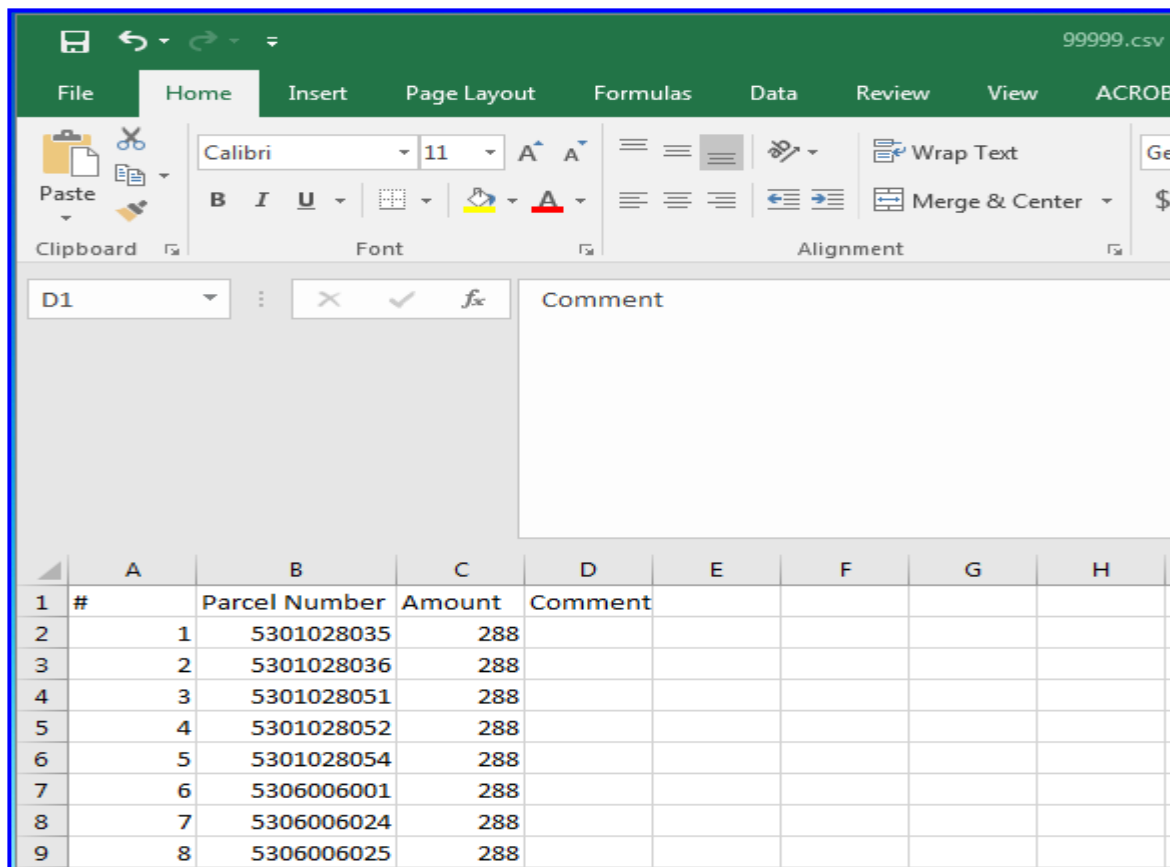
Show Filter - Records: 1 - 50 of 6115 - Pages: 1 | 2 | 3 | 4 | 5

#	Parcel Number	Amount	Duplicate	Comment
1	5301028035	288		
2	5301028036	288		
3	5301028051	288		

5N. The file will automatically download. Click the **Open file** button in the web browser Downloads folder to view the file.



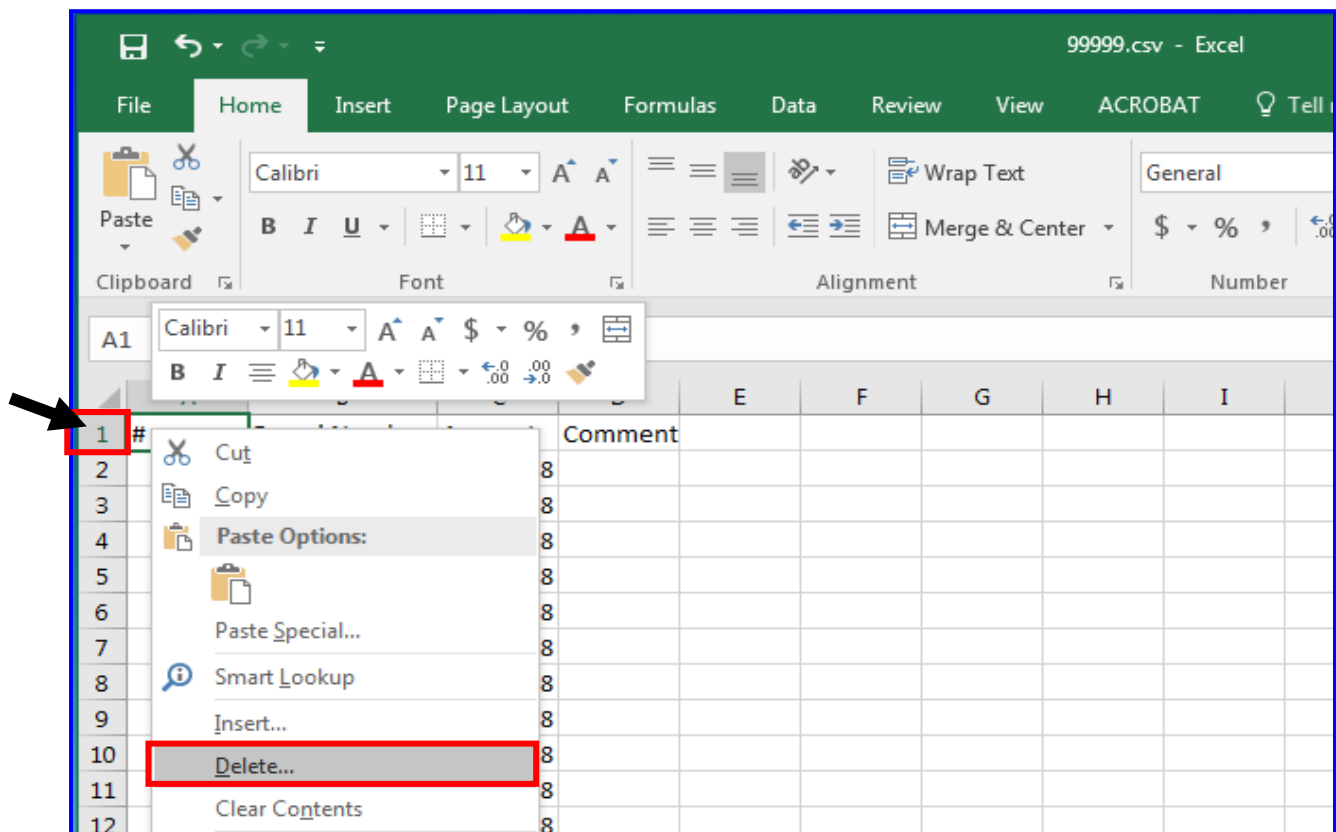
5O. Locate the rows that have comments/error messages and update the parcel number and/or amount containing the error.

A screenshot of Microsoft Excel showing a spreadsheet. The ribbon is set to 'Home'. The spreadsheet has columns labeled A through H. Column A is labeled '#', B is 'Parcel Number', C is 'Amount', and D is 'Comment'. The data in the spreadsheet is as follows:

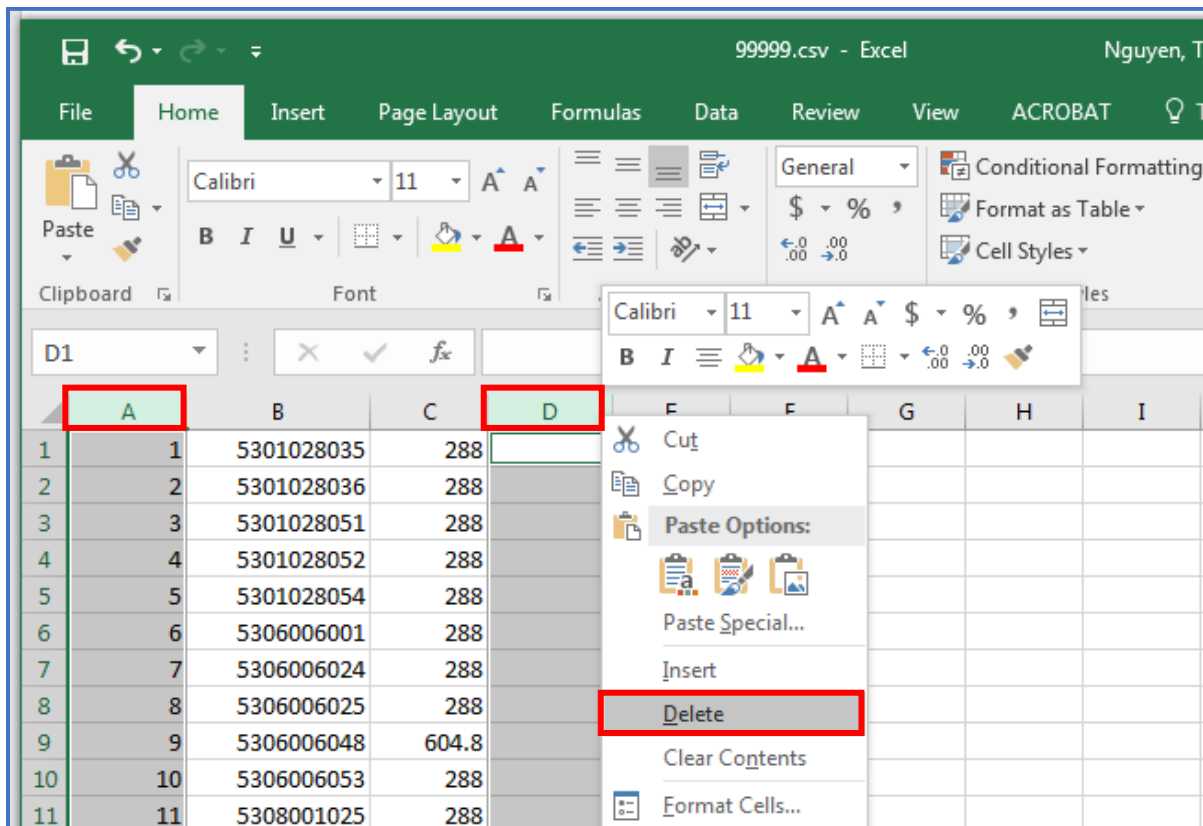
	A	B	C	D	E	F	G	H
1	#	Parcel Number	Amount	Comment				
2	1	5301028035	288					
3	2	5301028036	288					
4	3	5301028051	288					
5	4	5301028052	288					
6	5	5301028054	288					
7	6	5306006001	288					
8	7	5306006024	288					
9	8	5306006025	288					



5P. To delete the heading row, right click on row '1' and select **Delete** from the pop-up window.

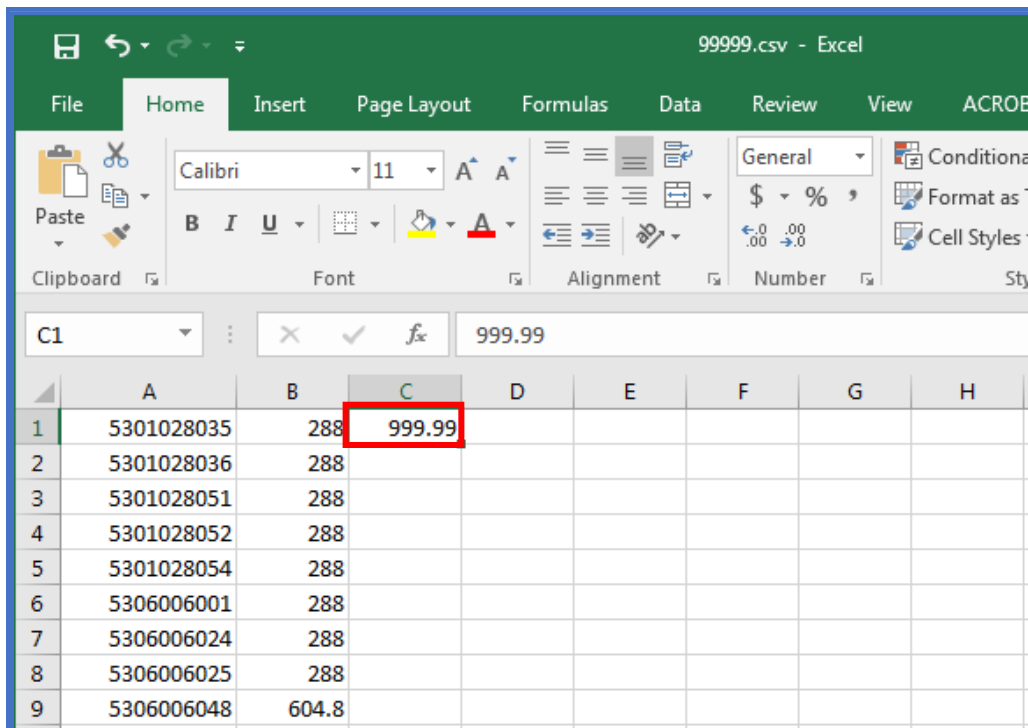


5Q. To delete the Line number and Comment columns, right click on columns 'A' and 'D' and select **Delete** from the pop-up window.

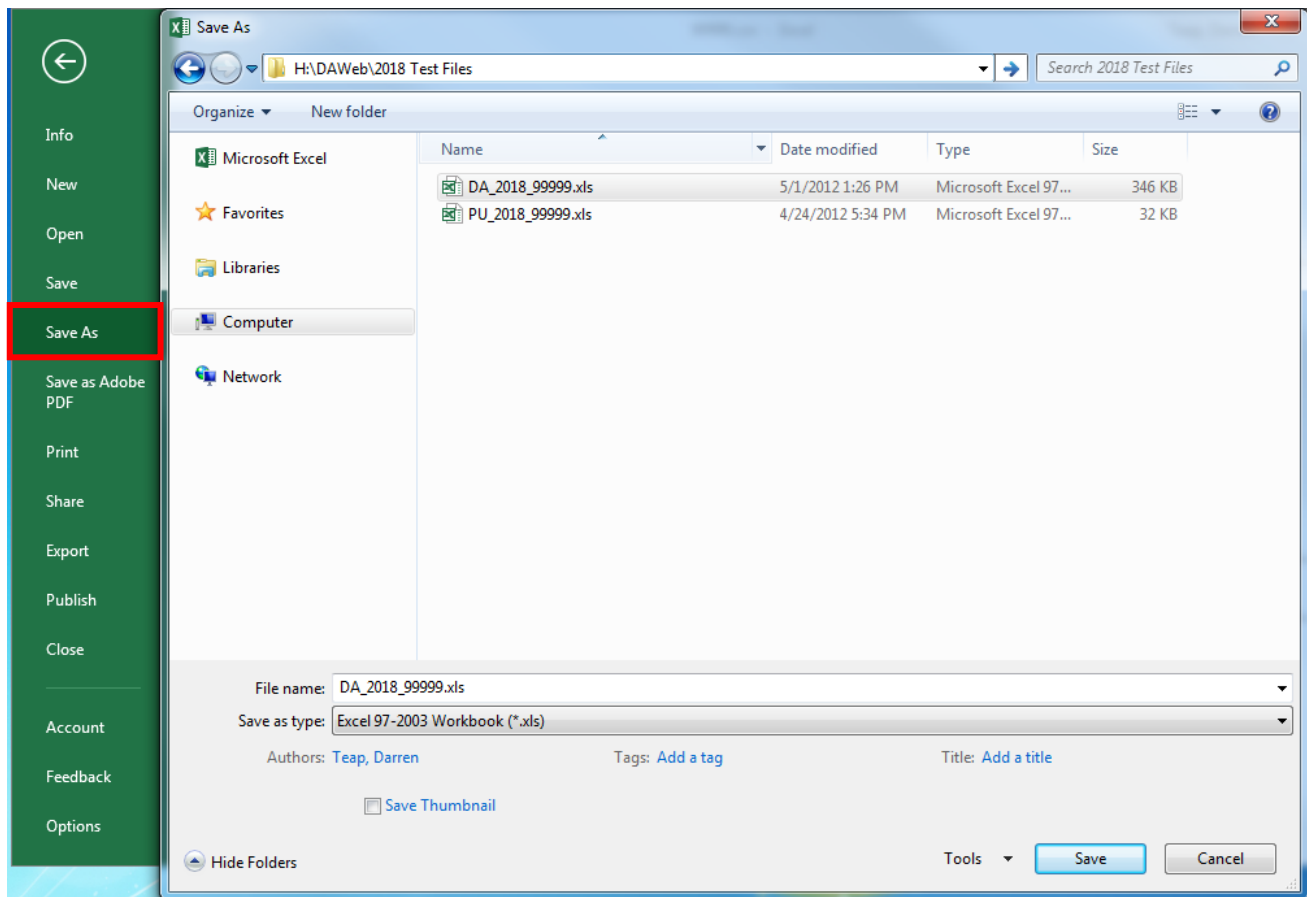


5R. Enter the agency number in cell 'C1'.

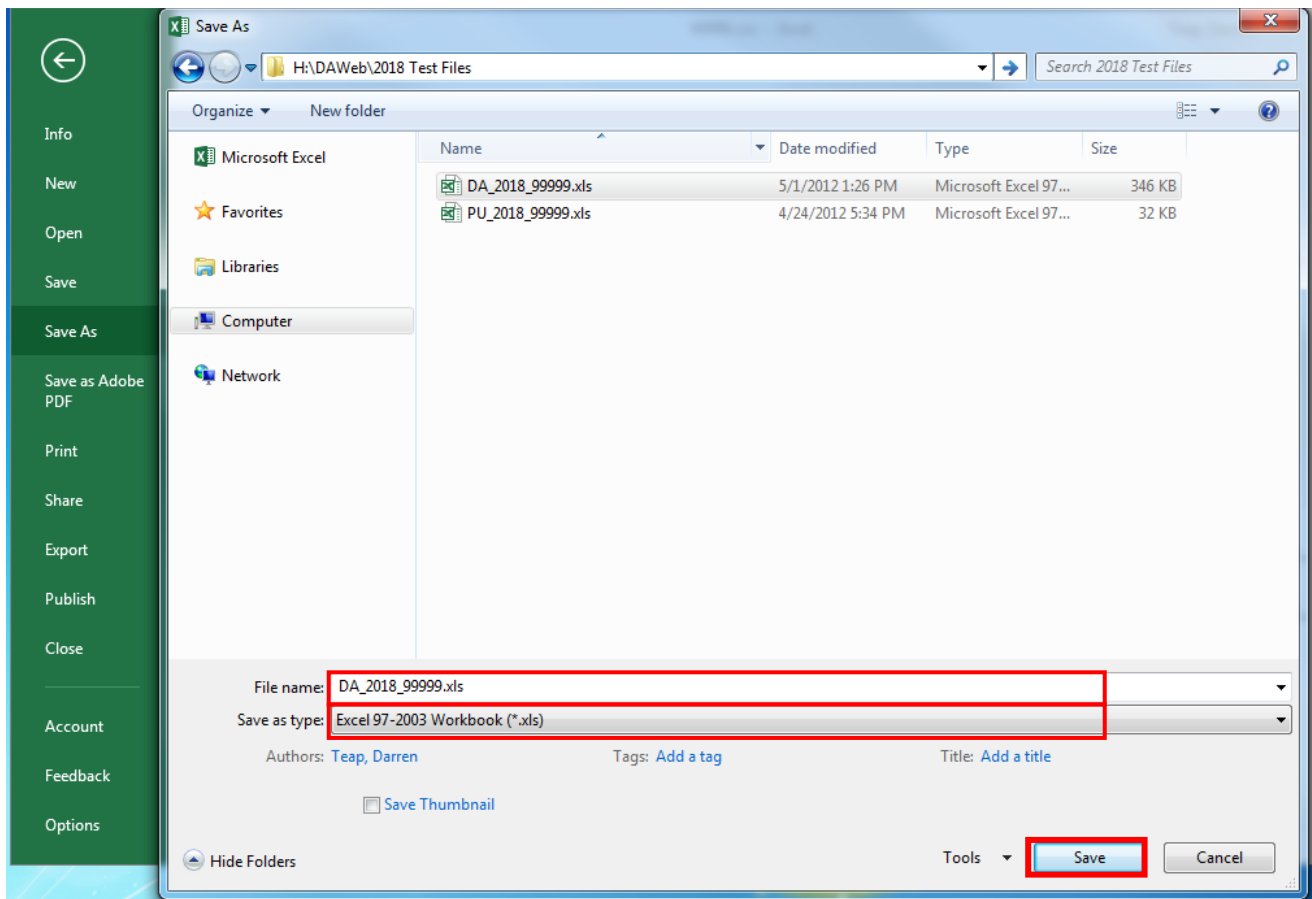
**NOTE:** Format cell C1 to Text format if your account number contains leading and/or ending zeros.



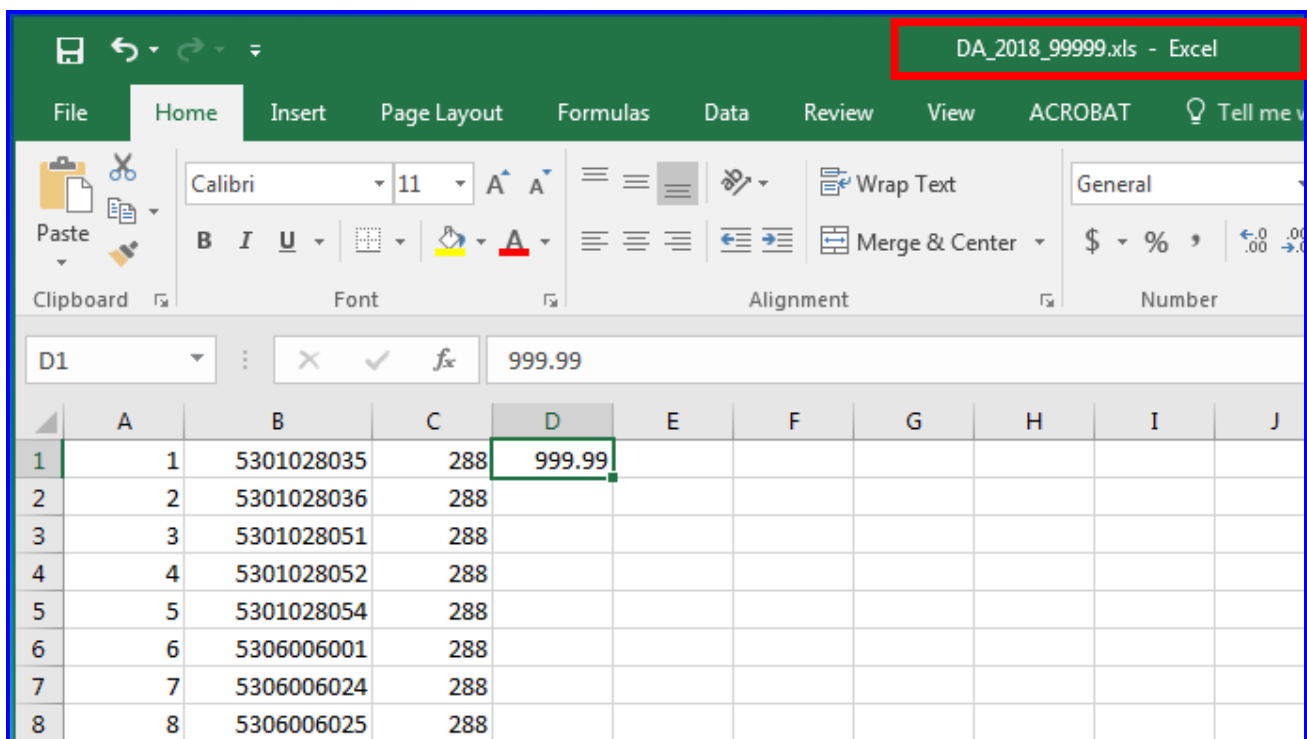
5S. From the menu bar, select **File**, **Save As**.



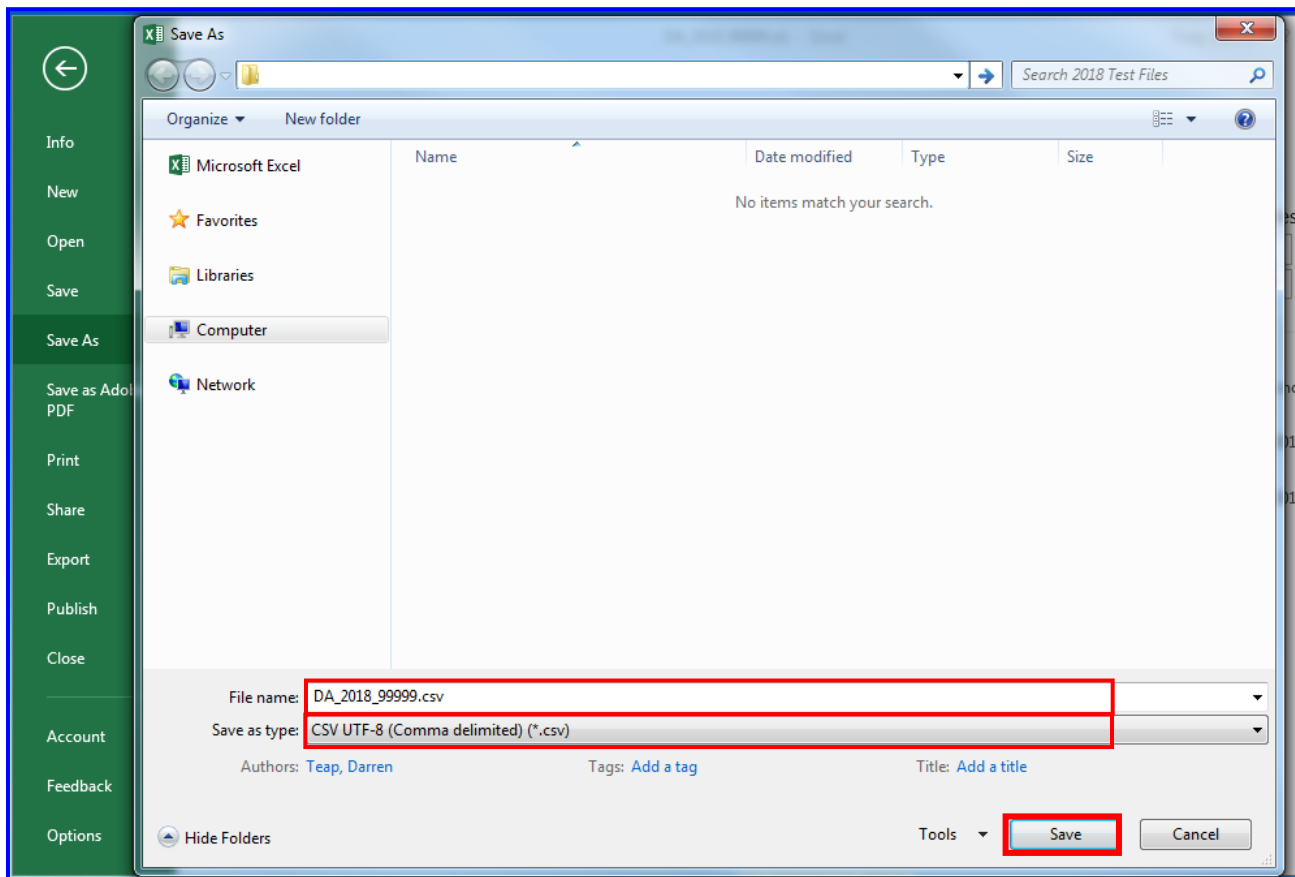
- 5T. To save as Excel file, choose a location where you want to save the file, rename the file, in the drop-down menu select 'Save as type' as Excel Workbook (.xls or .xlsx) and click the **Save** button. To save as a Text file, skip to step 5V.



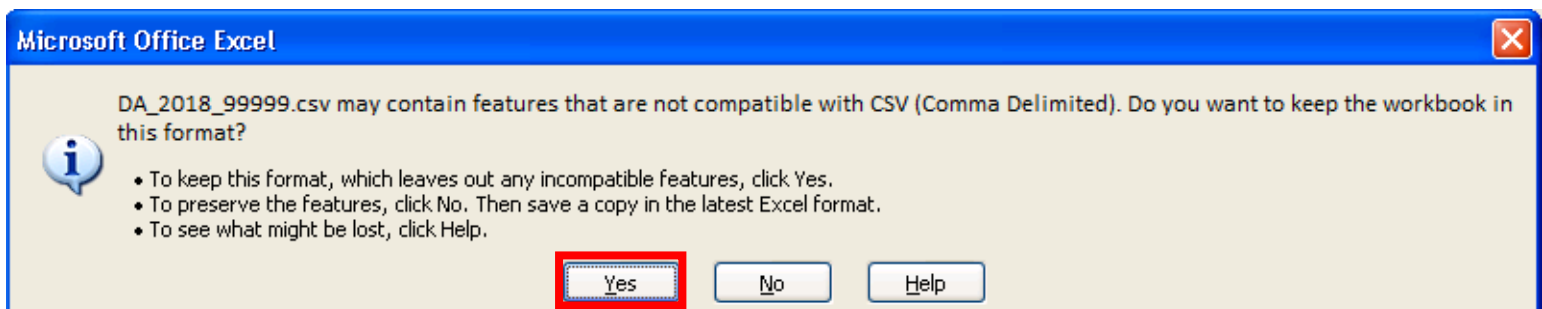
- 5U. The Detail file extension has been updated to **.xls** in the example below.



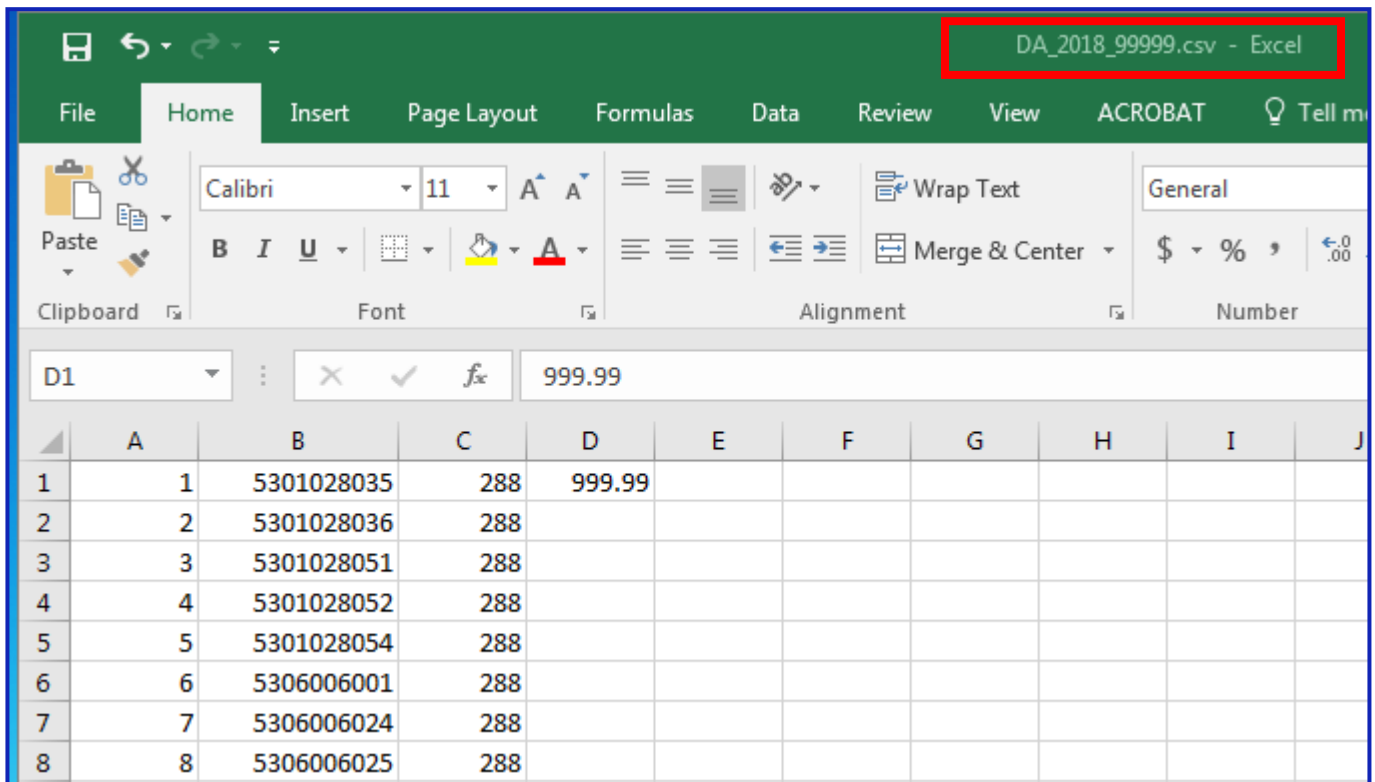
5V. To save as Text file, choose a location where you want to save the file, rename the file, select **CSV (Comma delimited)(\*.csv)** in the 'Save as type' drop-down box and click the **Save** button.



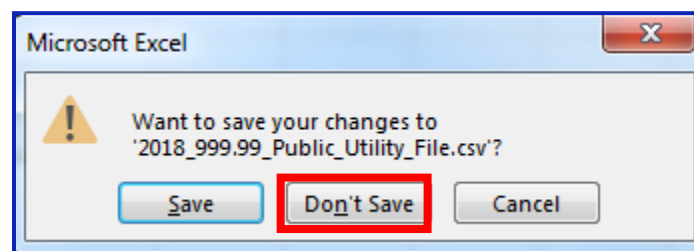
5W. Click the **Yes** button when the pop-up message appears.



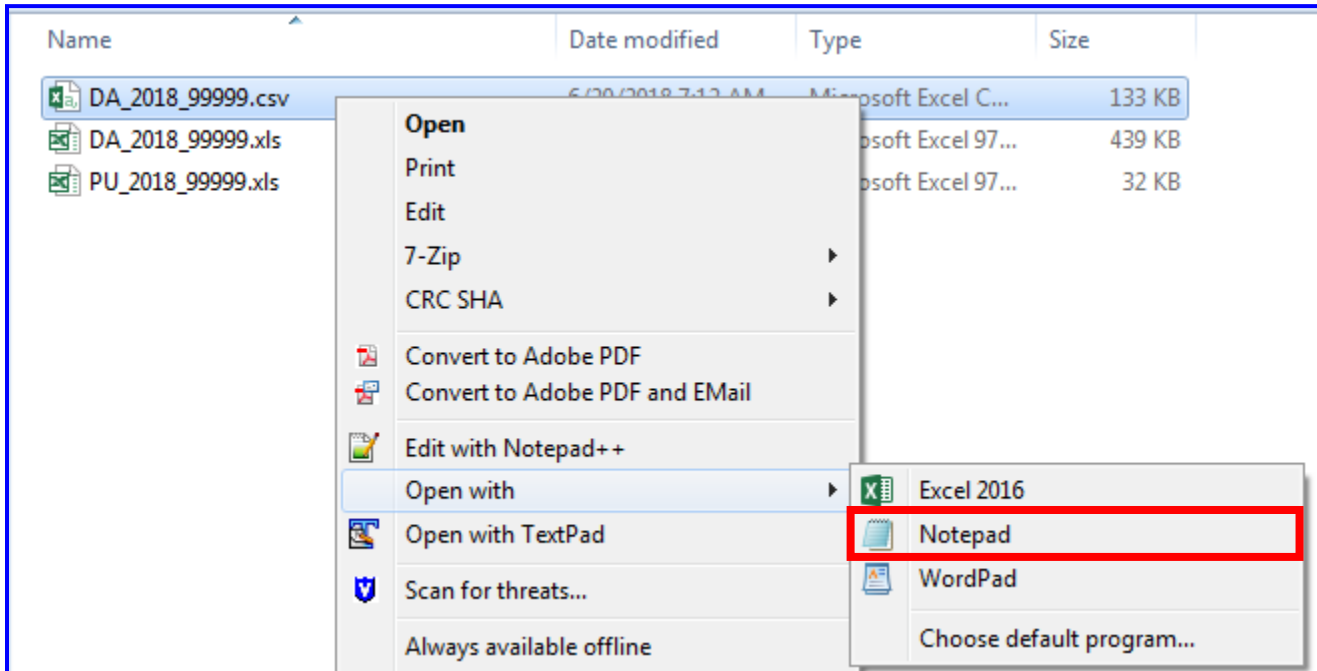
5X. The Detail file extension has been updated to **.csv** in the example below. Click the 'X' to close the application.



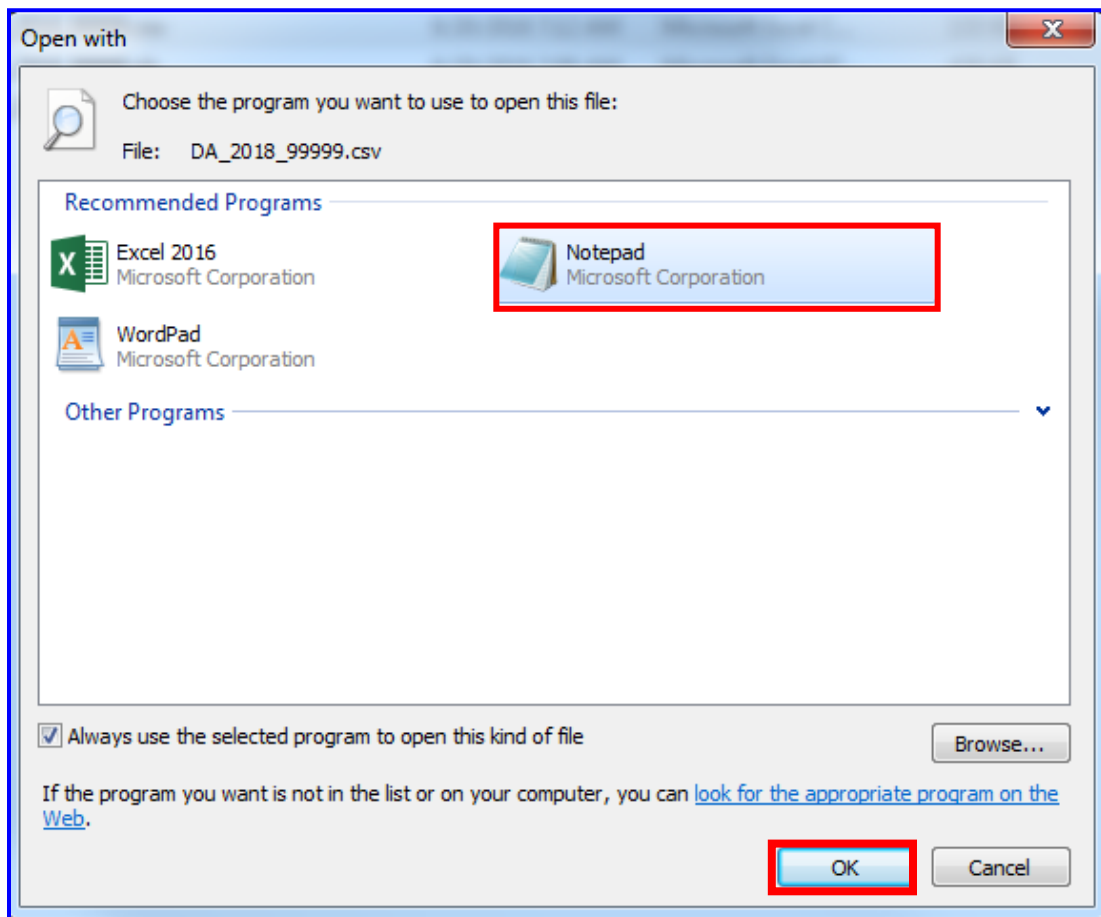
5Y. Click the **NO** button when the pop-up message appears.



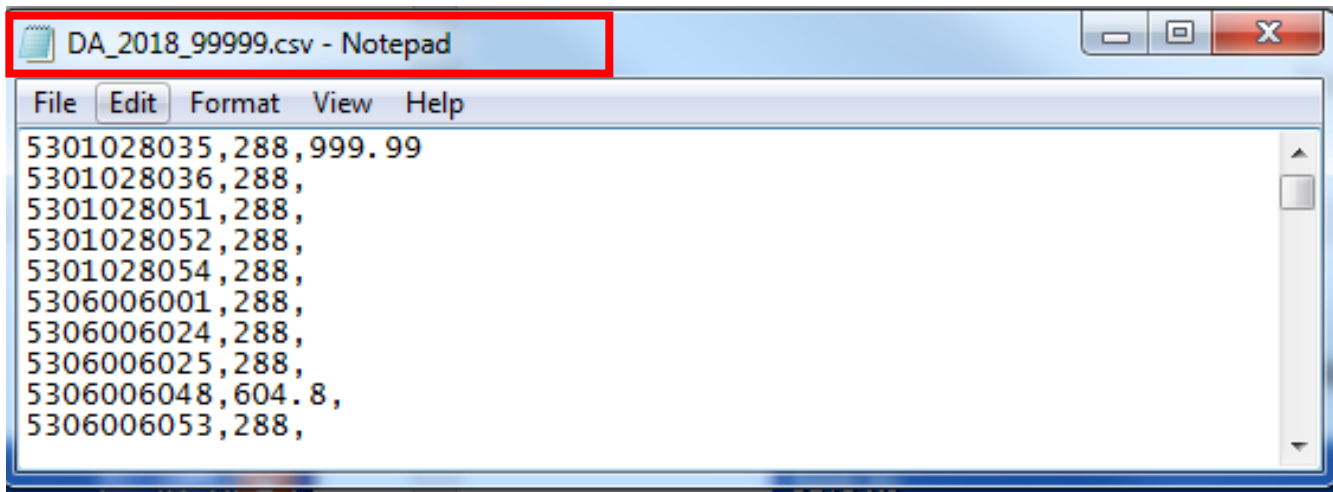
5Z. Locate the folder where you saved the .csv file, right click on the file and select **Open With, Choose Program...**



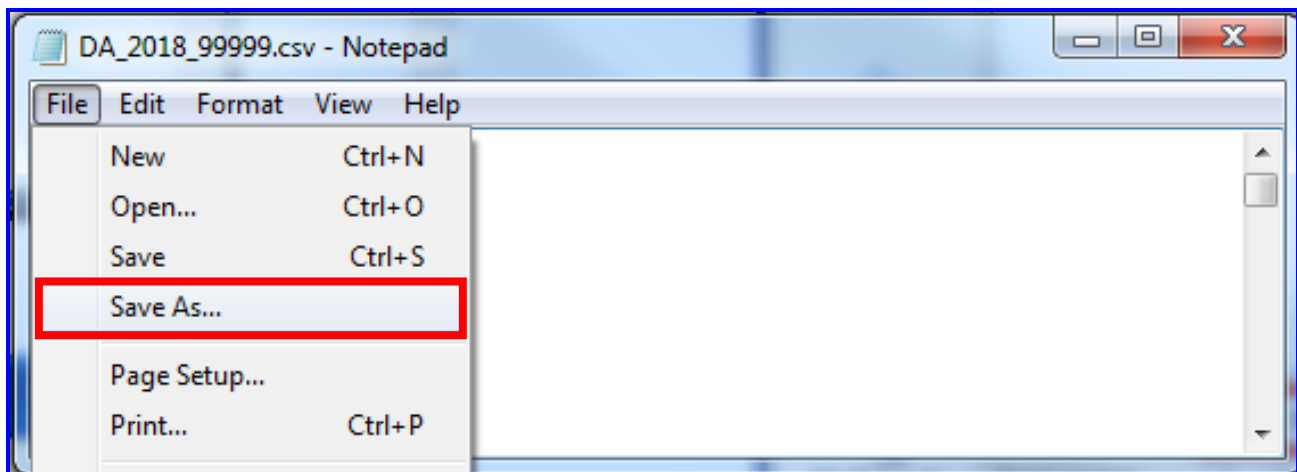
5AA. Select **Notepad** and click the **OK** button.



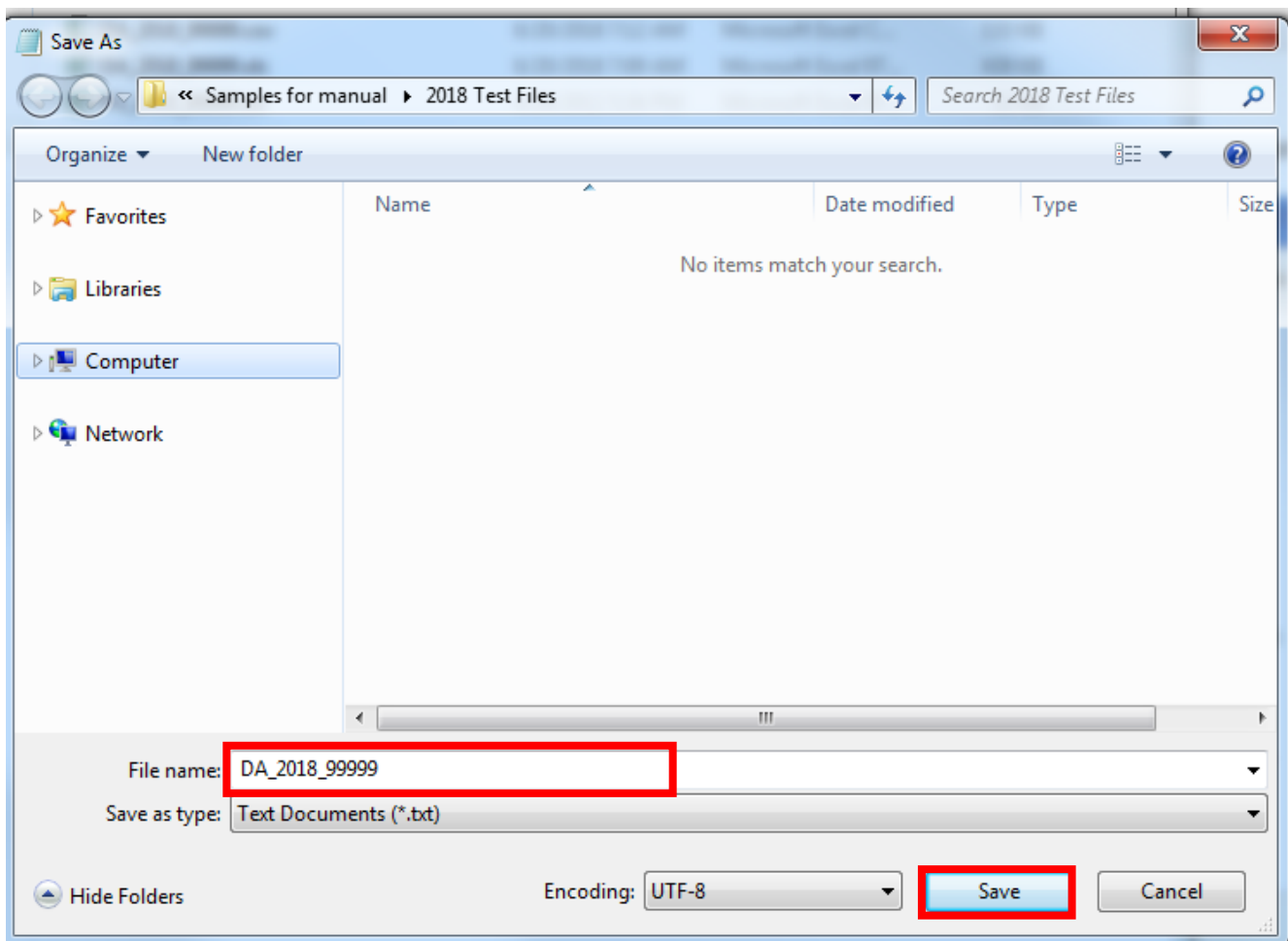
**5BB.** The .csv file will open in **Notepad**.



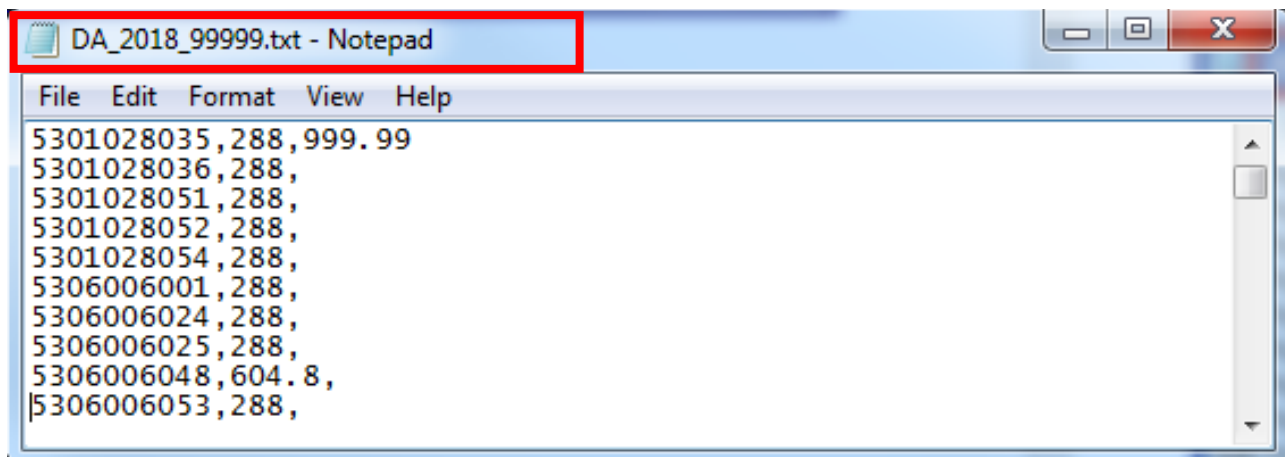
**5CC.** To save as .txt file, click **File, Save As...**



**5DD.** Delete the .csv extension from the File Name and click the **Save** button.



**5EE.** The file extension has been updated to .txt.





**5FF.** Click the **Data Transmittal** link under the **Report** column to verify the Total Parcel Count and DA Amount. **NOTE:** Please review the Data Transmittal immediately after file upload, to insure the total expected parcels and assessment amount were uploaded completely.

**DAWeb Auditor-Controller v 2.4.0.0** Options | Log Out | Help  
Welcome, Test User

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

**Inbox** NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file

Open Search Panel Submit Refresh

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
2018	999.99	DA	6,115	\$152,491,347.89	no	WORK IN PROGRESS	06/25/2018		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check In Delete
2018	999.99	PU	1,385	\$1,809,275.89	yes	SENT TO MAINFRAME	06/25/2018	08/23/2018	3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

Records per page: 100 Records: 1 - 2 of 2 - Pages: 1

**5GG.** The **Data Transmittal amounts must match** your expected totals. If they do not match then the input file should be reviewed to ensure all parcels are assessed properly. Re-upload a corrected file or make corrections to an existing file in **‘Correct the Data File in Edit Mode’** section (P. 66).

- **Print** the Data Transmittal, **sign** and **date** it, **fill in all blanks**, **scan** it as a PDF and **upload** the signed version to DAWeb. To upload documents, go to **‘Upload Legal Documents’** section (P. 87).
- The Auditor requires a signed Data Transmittal as 1 of the 4 Legal Documents.

DATE: June 25, 2018

TO: Department of Auditor-Controller  
Property Tax Services Division  
Direct Assessment Unit  
ATTN: Evelyn Ramirez

FILE TYPE:	Public Utility File
AGENCY ACCOUNT NUMBER:	999.99
BILL DESCRIPTION:	Test Agency
TOTAL ASSESSMENT AMOUNT:	\$1,809,275.89
TOTAL PARCEL COUNT:	1,385

This is to certify that the Total Assessment Amount and Total Parcel Count for our Agency Account Number listed above is correct and that we are authorized to add this Direct Assessment amount onto the Fiscal Year 2018-2019 Secured Tax Roll (STR).

Authorized By:	_____	_____
	Signature	Date Signed
Name and Title:	_____	
If there are any problems relating to the data provided, please call:		
Primary Contact:	_____	
Name and Title:	_____	
Phone Number:	_____	
Email Address:	_____	

**NOTE:** The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file.

- To fix the invalid file, proceed to **‘Correct the Data File in Edit Mode’** section (P. 66).
- To upload documents, proceed to **‘Upload Legal Documents’** section (P. 87).

The screenshot shows the DAWeb Auditor-Controller interface. At the top, there is a header with the County of Los Angeles logo, the text "DAWeb Auditor-Controller v 2.4.0.0", and user information "Options | Log Out | Help" and "Welcome, Test User". Below the header is a navigation bar with tabs: "Inbox", "Exempt Parcels", "Upload File", "Document Management", "Upload Document", and "Create AIS Form". The "Inbox" tab is active.

A red-bordered box highlights a note at the top of the inbox: "NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file".

Below the note are buttons for "Open Search Panel", "Submit", and "Refresh".

The main content is a table with the following columns: Fiscal Year, Agency #, File Type, TXN Count, Total DA AMT, Valid, Status, Upload Date, Submit Date, Docs, Report, and Action. There are two records in the table:

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action	
<input type="checkbox"/>	2018	999.99	DA	6,115	\$152,491,347.89	no		06/25/2018		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check In Delete
<input type="checkbox"/>	2018	999.99	PU	1,385	\$1,809,275.89	yes		06/25/2018	08/23/2018	3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

At the bottom left, there is a "Records per page:" dropdown menu set to "100". At the bottom right, there is a pagination control showing "Records: 1 - 2 of 2 - Pages: 1".

## CORRECT THE DATA FILE IN EDIT MODE

**6A.** If Valid = 'no', click the **Edit** link under the **Action** column to locate and fix the error(s). If the file has **150,000 transactions or less** the entire file will display in edit mode. If it has **more than 150,000 transactions**, you can **only** edit the records with errors. The two options for making corrections are as follows: (1) make corrections on the **Edit** page; (2) **export** the Detail Report, make changes on your exported file, **delete** the file from DAWeb and **re-upload** the updated file.

**DAWeb Auditor-Controller v 2.4.0.0**  
 Options | Log Out | Help  
 Welcome, Test User

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

**Inbox** NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file

Open Search Panel Submit Refresh

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action	
<input type="checkbox"/>	2018	999.99	DA	6,115	\$152,491,347.89	no	WORK IN PROGRESS	06/25/2018		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check In Delete
<input type="checkbox"/>	2018	999.99	PU	1,385	\$1,809,275.89	yes	SENT TO MAINFRAME	06/25/2018	08/23/2018	3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

Records per page: 100

**6B.** Click the **Action** drop-down box to view a list of menu options.

**DAWeb Auditor-Controller v 2.3.3.4**  
 Options | Log Out | Help  
 Welcome, Agency User

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

**Edit DA File**

Fiscal Year 2018  
 Agency Number 999.99  
 File Type Direct Assessment File  
 File Name DA\_2018\_99999.xls

Remark

Action: Select One  
 Go Back to Inbox/Check In  
 Submit the File to the Auditor  
 Delete  
 Reset

**NOTE:** The following options are listed under the **Action** drop-down box:

<b>Go Back to Inbox/Check In</b>	Brings you back to the Inbox with the file checked in and allows other users who have access to the agency number to edit, delete and submit the file.
<b>Submit the File to the Auditor</b>	Submits the agency file to the Auditor for review.
<b>Delete</b>	Deletes the agency file.
<b>Reset</b>	Resets changes on File type and Agency Number (must be done before clicking on the <b>Update</b> link).

**6C.** Verify the following on the Edit page:

- Verify that the **Fiscal Year, Agency Number, File Type and File Name** are correct. If any of the information is incorrect then delete the file and re-upload.
- Comments left by the Auditor regarding your agency data file(s) will be placed in the **Remark** box. Remarks can only be entered by the Auditor after your file has been submitted to the Auditor.
- Important Message in red font: **The File Type and Agency Number cannot be updated in Edit mode. If the File Type or Agency Number was uploaded incorrectly, delete the file and re-upload.**
- All **red error messages** under the **Comment** section must be fixed in order to validate the file. For a '**Table of Error Messages and Solutions**', refer to **P. 69**.

Options | Log Out | Help

DAWeb Auditor-Controller v 2.3.3.4 Welcome, Agency User

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

## Edit DA File

Action

Fiscal Year 2018  
 Agency Number 999.99  
 File Type Direct Assessment File  
 File Name DA\_2018\_99999.xls


Remark

The File Type and Agency Number cannot be updated in Edit mode. If the File Type or Agency Number was uploaded incorrectly, delete the file and re-upload.

Show Filter - Records: 1 - 50 of 6115 - Pages: 1 | 2 | 3 | 4 | 5

#	Parcel Number	Amount	Duplicate	Comment	
13	5864 023 009	150.00		<ul style="list-style-type: none"> <li>Parcel number must be 10 digits</li> <li>Parcel number must be all numeric</li> </ul>	Edit   Delete
2452	5315003801	604.80		<ul style="list-style-type: none"> <li>Parcel number cannot be non-assessable parcels</li> </ul>	Edit   Delete
3	581200601	150.00		<ul style="list-style-type: none"> <li>Parcel number must be 10 digits</li> </ul>	Edit   Delete
4	581200601G	150.00		<ul style="list-style-type: none"> <li>Parcel number must be all numeric</li> </ul>	Edit   Delete
7	5820009014	150150150.00		<ul style="list-style-type: none"> <li>Direct assessment amount exceeds the limit of 99,999,999.99</li> </ul>	Edit   Delete

**NOTE:** For files greater than 150,000 records, only the records with errors will display on the Edit page.

 **DAWeb** Auditor-Controller v 2.3.3.4 Options | Log Out | Help  
Welcome, Agency User

[Inbox](#) [Exempt Parcels](#) [Upload File](#) [Document Management](#) [Upload Document](#) [Create AIS Form](#)

### Edit DA File

Action

Fiscal Year 2018  
Agency Number 999.99  
File Type Direct Assessment File  
File Name DA\_2018\_99999.xls

Remark


The File Type and Agency Number cannot be updated in Edit mode. If the File Type or Agency Number was uploaded incorrectly, delete the file and re-upload.


Show Filter - Records: 1 - 50 of 6115 - Pages: 1 | 2 | 3 | 4 | 5

#	Parcel Number	Amount	Duplicate	Comment	
5048	5320005905	604.80		<ul style="list-style-type: none"><li>Parcel number cannot be non-assessable parcels</li></ul>	Edit   Delete
13	5864 023 009	150.00		<ul style="list-style-type: none"><li>Parcel number must be 10 digits</li><li>Parcel number must be all numeric</li></ul>	Edit   Delete
2452	5315003801	604.80		<ul style="list-style-type: none"><li>Parcel number cannot be non-assessable parcels</li></ul>	Edit   Delete
3	581200601	150.00		<ul style="list-style-type: none"><li>Parcel number must be 10 digits</li></ul>	Edit   Delete
4	581200601G	150.00		<ul style="list-style-type: none"><li>Parcel number must be all numeric</li></ul>	Edit   Delete
7	5820009014	150150150.00		<ul style="list-style-type: none"><li>Direct assessment amount exceeds the limit of 99,999,999.99</li></ul>	Edit   Delete
8	5808009024	150.0A		<ul style="list-style-type: none"><li>Invalid Direct Assessment Amount</li></ul>	Edit   Delete

Table of **Error Messages and Solutions:**

<b>ERROR MESSAGE</b>	<b>REASON</b>	<b>EXAMPLE</b>	<b>SOLUTION</b>
Duplicate Parcel	Duplicate parcels are not allowed	8765432100 8765432100	Delete or change one of the duplicate records
Parcel number cannot be non-assessable for DA file	If the first four digits of the Parcel number is less than '8900' then the last 3 digits must not end between <b>800-999</b>	2348654 <b>301</b> 5934820 <b>883</b> 8584827 <b>999</b>	Delete or update parcel
Parcel number must be 10 digits	Does not equal 10 bytes	876543210 87654321089	8765432100
Parcel number must be all numeric	Not all numeric	8765432 <b>K</b> 00 876 <b>\$</b> 432100	8765432100
Parcel number must be 10 digits; Parcel number must be all numeric	No spaces or dashes allowed	8999 999 999 899-999-9999	8765432100
Parcel number cannot start with '9' for DA file	DA file cannot start with '9'	<b>9</b> 876543210	8765432100
Parcel number must start with '9' for PU file	PU file must start with '9'	<b>8</b> 765432100	9876543210
Direct Assessment Amount exceeds the limit of 99,999,999.99	Must not exceed <b>99,999,999.99</b>	<b>1</b> 23,456,789.01	23,456,789.01
Invalid Direct Assessment Amount	Not all numeric	1,234.5 <b>H</b>	1234.52
Direct assessment amount must be positive	Amount cannot be negative	<b>-</b> 1234.50	1234.50
Direct Assessment Amount cannot exceed two decimal points: XX.XXX	Format is not XXXX.XX	1,234.56 <b>7</b>	1234.57
Only corrections can have \$0 value	DA or PU files can not contain \$0 Amount	\$0 in DA/PU file	Update amount or delete record

6D. For parcel number and amount corrections, click the **Comment** header twice until there is a down arrow  to sort/display all of the error messages to the top of the list.


DAWeb
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Welcome, Agency User

Inbox | Exempt Parcels | Upload File | Document Management | Upload Document | Create AIS Form

## Edit DA File

Action [Select One]

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA\_2018\_99999.xls


Remark

The File Type and Agency Number cannot be updated in Edit mode. If the File Type or Agency Number was uploaded incorrectly, delete the file and re-upload.

Show Filter - Records: 1 - 50 of 5988 - Pages: 1 | 2 | 3 | 4 | 5

#	Parcel Number	Amount	Comment	
1	5658008017	150.00		Edit   Delete
2	5657022011	15000		Edit   Delete
3	581200601	150.00	• Parcel number must be 10 digits	Edit   Delete
4	581200601G	150.00	• Parcel number must be all numeric	Edit   Delete
5	5812006020	150.00		Edit   Delete
6	5812006020	150.00	• Duplicate Parcel	Edit   Delete
7	5820009014	150150150.00	• Direct assessment amount exceeds the limit of 99,999,999.99	Edit   Delete
8	5808009024	150.0A	• Invalid Direct Assessment Amount	Edit   Delete
9	5812014024	0.00	• Only corrections can have \$0 value	Edit   Delete
10	9806019009	150.00	• Parcel number cannot start with 9 for DA file	Edit   Delete
11	5657004002	-150.00	• Direct assessment amount must be positive	Edit   Delete
12	5657004003	150.005	• Amount cannot exceed two decimals:150.005	Edit   Delete
13	5864 023 009	150.00	• Parcel number must be 10 digits • Parcel number must be all numeric	Edit   Delete

**NOTE:** Row #, Parcel Number and Amount columns can also be sorted by clicking on the title bar of each heading.



DAWeb

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Auditor Controller

v2.2.2.4

Welcome, Agency User

[Inbox](#) | [Exempt Parcels](#) | [Upload File](#) | [Document Management](#) | [Upload Document](#) | [Create AIS Form](#)

## Edit DA File

Action [Select One]

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA\_2018\_99999.xls

Remark

Number cannot be updated in Edit mode. If the File Type or Agency Number was uploaded incorrectly, delete the file and re-upload.

Sorted by Row
Show Filter - Records: 1 - 50 of 5988 - Pages: 1 | 2 | 3 | 4 | 5

#	Parcel Number	Amount	Comment	
1	5658008017	150.00		<a href="#">Edit</a>   <a href="#">Delete</a>
2	5657022011	15000		<a href="#">Edit</a>   <a href="#">Delete</a>
3	581200601	150.00	• Parcel number must be 10 digits	<a href="#">Edit</a>   <a href="#">Delete</a>
4	581200601G	150.00	• Parcel number must be all numeric	<a href="#">Edit</a>   <a href="#">Delete</a>
5	5812006020	150.00		<a href="#">Edit</a>   <a href="#">Delete</a>
6	5812006020	150.00	• Duplicate Parcel	<a href="#">Edit</a>   <a href="#">Delete</a>
7	5820009014	150150150.00	• Direct assessment amount exceeds the limit of 99,999,999.99	<a href="#">Edit</a>   <a href="#">Delete</a>
8	5808009024	150.0A	• Invalid Direct Assessment Amount	<a href="#">Edit</a>   <a href="#">Delete</a>
9	5812014024	0.00	• Only corrections can have \$0 value	<a href="#">Edit</a>   <a href="#">Delete</a>
10	9806019009	150.00	• Parcel number cannot start with 9 for DA file	<a href="#">Edit</a>   <a href="#">Delete</a>
11	5657004002	-150.00	• Direct assessment amount must be positive	<a href="#">Edit</a>   <a href="#">Delete</a>
12	5657004003	150.005	• Amount cannot exceed two decimals:150.005	<a href="#">Edit</a>   <a href="#">Delete</a>
13	5864 023 009	150.00	• Parcel number must be 10 digits • Parcel number must be all numeric	<a href="#">Edit</a>   <a href="#">Delete</a>



6E. The first error displayed on the list is a **duplicate parcel**. To search for the duplicate parcel number, click the **Show Filter** link.

The screenshot shows the DAWeb Auditor Controller interface. At the top, there is a navigation bar with the County of Los Angeles logo, the 'DAWeb Auditor Controller' title, version 'v2.2.2.4', and user information 'Welcome, Agency User'. Below the navigation bar are several menu items: 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'.

The main content area is titled 'Edit DA File'. It includes a dropdown menu for 'Action' set to '[Select One]', and several fields: 'Fiscal Year' (2018), 'Agency Number' (999.99), 'File Type' (Direct Assessment File), and 'File Name' (DA\_2018\_99999.xls). There is also a 'Remark' text area.

Below the form, a red error message states: 'The File Type and Agency Number cannot be updated in Edit mode. If the File Type or Agency Number was uploaded incorrectly, delete the file and re-upload.' A 'Show Filter' button is highlighted with a red box.

The main data table has the following columns: '#', 'Parcel Number', 'Amount', 'Comment', and 'Edit | Delete'. The first row (index 6) is highlighted with a red box around the 'Duplicate Parcel' error message in the 'Comment' column.

#	Parcel Number	Amount	Comment	Edit   Delete
6	5812006020	150.00	• Duplicate Parcel	Edit   Delete
7	5820009014	150150150.00	• Direct assessment amount exceeds the limit of 99,999,999.99	Edit   Delete
8	5808009024	150.0A	• Invalid Direct Assessment Amount	Edit   Delete
9	5812014024	0.00	• Only corrections can have \$0 value	Edit   Delete
10	9806019009	150.00	• Parcel number cannot start with 9 for DA file	Edit   Delete
11	5657004002	-150.00	• Direct assessment amount must be positive	Edit   Delete
12	5657004003	150.005	• Amount cannot exceed two decimals:150.005	Edit   Delete
13	5864 023 009	150.00	• Parcel number must be 10 digits • Parcel number must be all numeric	Edit   Delete
3	581200601	150.00	• Parcel number must be 10 digits	Edit   Delete
4	581200601G	150.00	• Parcel number must be all numeric	Edit   Delete
5511	5819008987	150.00	• Parcel number cannot be non-assessable parcels	Edit   Delete
3090	5657017002	150.00		Edit   Delete

6F. Type in the duplicate parcel number and click the **Apply Filter** link or press the **Enter** button.

**NOTE:** The filter drop-down box can be set to 'Equal To' or 'Starts With'.

Options | Log Out | Help

Welcome, Agency User

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

### Edit DA File

Action [Select One] ▼

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA\_2018\_99999.xls

Remark

The File Type and Agency Number cannot be updated in Edit mode. If the File Type or Agency Number was uploaded incorrectly, delete the file and re-upload.

Apply Filter Hide Filter - Records: 1 - 50 of 5988 - Pages: 1 | 2 | 3 | 4 | 5

#	Parcel Number	Amount	Comment	
6	5812006020	150.00	• Duplicate Parcel	Edit   Delete
7	5820009014	150150150.00	• Direct assessment amount exceeds the limit of 99,999,999.99	Edit   Delete
8	5808009024	150.0A	• Invalid Direct Assessment Amount	Edit   Delete
9	5812014024	0.00	• Only corrections can have \$0 value	Edit   Delete
10	9806019009	150.00	• Parcel number cannot start with 9 for DA file	Edit   Delete
11	5657004002	-150.00	• Direct assessment amount must be positive	Edit   Delete
12	5657004003	150.005	• Amount cannot exceed two decimals:150.005	Edit   Delete
13	5864 023 009	150.00	• Parcel number must be 10 digits • Parcel number must be all numeric	Edit   Delete
3	581200601	150.00	• Parcel number must be 10 digits	Edit   Delete
4	581200601G	150.00	• Parcel number must be all numeric	Edit   Delete

**6G.** Duplicate parcels may have **different amounts**. Determine which duplicate parcels need to be deleted, click the **Delete** link or click the **Edit** link and update the parcel number(s) so they are no longer duplicates.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

## Edit DA File

Action [Select One] ▾

Fiscal Year 2018  
 Agency Number 999.99  
 File Type Direct Assessment File  
 File Name DA\_2018\_99999.xls

Remark

The File Type and Agency Number cannot be updated in Edit mode. If the File Type or Agency Number was uploaded incorrectly, delete the file and re-upload.

Apply Filter | Hide Filter | Remove Filter - Records: 1 - 50 of 5988 - Pages: 1 | 2 | 3 | 4 | 5

#	Parcel Number	Amount	Comment	
	<input type="text" value="5812006020"/>	<input type="text" value=""/>		
6	5812006020	150.00	• Duplicate Parcel	<a href="#">Edit</a> <a href="#">Delete</a>
5	5812006020	300.00		<a href="#">Edit</a> <a href="#">Delete</a>

Records per page: 50

Add New

**NOTE:** If the **Duplicate Parcel** error message did not clear after one of the duplicates was deleted or edited, click the **Edit** link and then click the **Update** link to clear out the comment.

Apply Filter | Hide Filter | Remove Filter - Records: 1 - 50 of 5988 - Pages: 1 | 2 | 3 | 4 | 5

#	Parcel Number	Amount	Comment	
	<input type="text" value="5812006020"/>	<input type="text" value=""/>		
6	5812006020	150.00	• Duplicate Parcel	<a href="#">Edit</a> <a href="#">Delete</a>

Records per page: 50

Add New

Apply Filter | Hide Filter | Remove Filter - Records: 1 - 50 of 5987 - Pages: 1 | 2 | 3 | 4 | 5

#	Parcel Number	Amount	Comment	
	<input type="text" value="5812006020"/>	<input type="text" value=""/>		
6	<input type="text" value="5812006020"/>	<input type="text" value="150.00"/>	• Duplicate Parcel	<a href="#">Update</a> <a href="#">Cancel</a>

Records per page: 50

Add New

Apply Filter | Hide Filter | Remove Filter - Records: 1 - 50 of 5987 - Pages: 1 | 2 | 3 | 4 | 5

#	Parcel Number	Amount	Comment	
	<input type="text" value="5812006020"/>	<input type="text" value=""/>		
6	5812006020	<input type="text" value=""/>		<a href="#">Edit</a> <a href="#">Delete</a>

Records per page: 50

Add New

6H. Click the **Remove Filter** link to bring back the list of errors.

The screenshot shows the 'Edit DA File' page in the DAWeb Auditor Controller. At the top, there is a navigation bar with 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. The page title is 'Edit DA File'. Below the title, there is an 'Action' dropdown menu set to '[Select One]'. The page displays the following information: Fiscal Year: 2018, Agency Number: 999.99, File Type: Direct Assessment File, and File Name: DA\_2018\_99999.xls. There is a 'Remark' text area. Below this, a red message states: 'The File Type and Agency Number cannot be updated in Edit mode. If the File Type or Agency Number was uploaded incorrectly, delete the file and re-upload.' The main content area features a table with columns for '#', 'Parcel Number', 'Amount', and 'Comment'. The table has a filter panel above it with 'Apply Filter', 'Hide Filter', and 'Remove Filter' buttons. The 'Remove Filter' button is highlighted with a red box. The table shows one record with Parcel Number 5812006020 and Amount 150.00. The bottom of the page has 'Records per page: 50' and an 'Add New' button.

6I. Click the **Hide Filter** link to hide the parcel filter panel.

The screenshot shows the 'Edit DA File' page in the DAWeb Auditor Controller. The layout is similar to the previous screenshot, but the filter panel is hidden. The red message is still present. The main content area features a table with columns for '#', 'Parcel Number', 'Amount', and 'Comment'. The table has a filter panel above it with 'Apply Filter', 'Hide Filter', and 'Remove Filter' buttons. The 'Hide Filter' button is highlighted with a red box. The table shows four records with error messages in the 'Comment' column: 'Direct assessment amount exceeds the limit of 99,999,999.99', 'Invalid Direct Assessment Amount', 'Only corrections can have \$0 value', and 'Parcel number cannot start with 9 for DA file'. The bottom of the page has 'Records per page: 50' and an 'Add New' button.

6J. To edit an amount, click on the **Amount** field, enter the updated amount in the text box and click the **Update** link.

DAWeb

Auditor Controller v2.2.2.4

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Inbox | [Exempt Parcels](#) | [Upload File](#) | [Document Management](#) | [Upload Document](#) | [Create AIS Form](#)

## Edit DA File

Action [Select One] ▼

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA\_2018\_99999.xls

Remark

The File Type and Agency Number cannot be updated in Edit mode. If the File Type or Agency Number was uploaded incorrectly, delete the file and re-upload.

Show Filter - Records: 1 - 50 of 5987 - Pages: 1 | [2](#) | [3](#) | [4](#) | [5](#)

#	Parcel Number	Amount	Comment	
7	<input style="width: 100px;" type="text" value="5820009014"/>	<input style="width: 100px;" type="text" value="150.00"/>	<ul style="list-style-type: none"> <li>• Direct assessment amount exceeds the limit of 99,999,999.99</li> </ul>	<span style="border: 1px solid red; padding: 2px 5px; font-weight: bold;">Update</span>   Cancel
8	5808009024	150.0A	<ul style="list-style-type: none"> <li>• Invalid Direct Assessment Amount</li> </ul>	Edit   Delete
9	5812014024	0.00	<ul style="list-style-type: none"> <li>• Only corrections can have \$0 value</li> </ul>	Edit   Delete
10	9806019009	150.00	<ul style="list-style-type: none"> <li>• Parcel number cannot start with 9 for DA file</li> </ul>	Edit   Delete
11	5657004002	-150.00	<ul style="list-style-type: none"> <li>• Direct assessment amount must be positive</li> </ul>	Edit   Delete
12	5657004003	150.005	<ul style="list-style-type: none"> <li>• Amount cannot exceed two decimals:150.005</li> </ul>	Edit   Delete
13	5864 023 009	150.00	<ul style="list-style-type: none"> <li>• Parcel number must be 10 digits</li> <li>• Parcel number must be all numeric</li> </ul>	Edit   Delete
3	581200601	150.00	<ul style="list-style-type: none"> <li>• Parcel number must be 10 digits</li> </ul>	Edit   Delete
4	581200601G	150.00	<ul style="list-style-type: none"> <li>• Parcel number must be all numeric</li> </ul>	Edit   Delete
5511	5819008987	150.00	<ul style="list-style-type: none"> <li>• Parcel number cannot be non-assessable parcels</li> </ul>	Edit   Delete
3812	5812025052	150.00		Edit   Delete

6K. Row #7 (from the previous screen) has been updated and **no longer appears at the top of the list** since it no longer contains an error message and the columns are **sorted by the Comment field**.

DAWeb

**Auditor Controller**  
v2.2.2.4

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## Edit DA File

Action

Fiscal Year 2018  
 Agency Number 999.99  
 File Type Direct Assessment File  
 File Name DA\_2018\_99999.xls

Remark

The File Type and Agency Number cannot be updated in Edit mode. If the File Type or Agency Number was uploaded incorrectly, delete the file and re-upload.

Show Filter - Records: 1 - 50 of 5987 - Pages: 1 | 2 | 3 | 4 | 5

#	Parcel Number	Amount	Comment	
8	5808009024	150.0A	• Invalid Direct Assessment Amount	Edit   Delete
9	5812014024	0.00	• Only corrections can have \$0 value	Edit   Delete
10	9806019009	150.00	• Parcel number cannot start with 9 for DA file	Edit   Delete
11	5657004002	-150.00	• Direct assessment amount must be positive	Edit   Delete
12	5657004003	150.005	• Amount cannot exceed two decimals:150.005	Edit   Delete
13	5864 023 009	150.00	• Parcel number must be 10 digits • Parcel number must be all numeric	Edit   Delete
3	581200601	150.00	• Parcel number must be 10 digits	Edit   Delete
4	581200601G	150.00	• Parcel number must be all numeric	Edit   Delete
5511	5819008987	150.00	• Parcel number cannot be non-assessable parcels	Edit   Delete
3812	5812025052	150.00		Edit   Delete

6L. To edit a parcel number, **click on the Parcel Number field, enter the updated parcel in the text box and click the Update link.**

The screenshot shows the DAWeb Auditor Controller interface. At the top, there is a navigation bar with the DAWeb logo, 'Auditor Controller v2.2.2.4', and user options like 'Options | Log Out | Help' and 'Welcome, Agency User'. Below the navigation bar are tabs for 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. The main content area is titled 'Edit DA File' and includes a dropdown menu for 'Action [Select One]', fields for 'Fiscal Year 2018', 'Agency Number 999.99', 'File Type Direct Assessment File', and 'File Name DA\_2018\_99999.xls'. There is also a 'Remark' text area. A red warning message states: 'The File Type and Agency Number cannot be updated in Edit mode. If the File Type or Agency Number was uploaded incorrectly, delete the file and re-upload.' Below this is a table with columns for '#', 'Parcel Number', 'Amount', and 'Comment'. The table contains 13 rows of data, with the 10th row highlighted. In this row, the 'Parcel Number' field '7806019009' and the 'Update' button are highlighted with red boxes. The 'Amount' field is set to '150.00'. The comment for this row is 'Parcel number cannot start with 9 for DA file'. Other rows have various error messages such as 'Invalid Direct Assessment Amount', 'Only corrections can have \$0 value', 'Direct assessment amount must be positive', 'Amount cannot exceed two decimals:150.005', 'Parcel number must be 10 digits', and 'Parcel number cannot be non-assessable parcels'.

**Edit DA File**

Action [Select One] ▼

Fiscal Year 2018  
 Agency Number 999.99  
 File Type Direct Assessment File  
 File Name DA\_2018\_99999.xls


Remark

The File Type and Agency Number cannot be updated in Edit mode. If the File Type or Agency Number was uploaded incorrectly, delete the file and re-upload.

Show Filter - Records: 1 - 50 of 5987 - Pages: 1 | 2 | 3 | 4 | 5

#	Parcel Number	Amount	Comment	
8	5808009024	150.0A	• Invalid Direct Assessment Amount	Edit   Delete
9	5812014024	0.00	• Only corrections can have \$0 value	Edit   Delete
10	<input type="text" value="7806019009"/>	<input type="text" value="150.00"/>	• Parcel number cannot start with 9 for DA file	<b>Update</b> Cancel
11	5657004002	-150.00	• Direct assessment amount must be positive	Edit   Delete
12	5657004003	150.005	• Amount cannot exceed two decimals:150.005	Edit   Delete
13	5864 023 009	150.00	• Parcel number must be 10 digits • Parcel number must be all numeric	Edit   Delete
3	581200601	150.00	• Parcel number must be 10 digits	Edit   Delete
4	581200601G	150.00	• Parcel number must be all numeric	Edit   Delete
5511	5819008987	150.00	• Parcel number cannot be non-assessable parcels	Edit   Delete
3812	5812025052	150.00		Edit   Delete
3813	5817033042	150.00		Edit   Delete

**6M. Please ensure all comments/error messages are completed and removed by clicking the Comment header twice.** The agency file will only show valid = 'yes' after all errors are fixed.


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## Edit DA File

Action

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA\_2018\_99999.xls

Remark

The File Type and Agency Number cannot be updated in Edit mode. If the File Type or Agency Number was uploaded incorrectly, delete the file and re-upload.

Show Filter - Records: 1 - 50 of 5987 - Pages: 1 | 2 | 3 | 4 | 5

#	Parcel Number	Amount	Comment	
3812	5812025052	150.00		Edit   Delete
3813	5817033042	150.00		Edit   Delete
3814	5816023020	150.00		Edit   Delete
3815	5817029019	150.00		Edit   Delete
3816	5812008035	150.00		Edit   Delete
3817	5815025010	150.00		Edit   Delete
3818	5806021006	150.00		Edit   Delete
3819	5812023032	150.00		Edit   Delete
3820	5812023033	150.00		Edit   Delete
3821	5812023018	150.00		Edit   Delete
3822	5812023019	150.00		Edit   Delete
3823	5812023020	150.00		Edit   Delete
3824	5810022010	150.00		Edit   Delete
3825	5658005007	150.00		Edit   Delete
3826	5864037008	150.00		Edit   Delete
3827	5658011010	150.00		Edit   Delete
3828	5816004003	150.00		Edit   Delete



6N. To add a new row, scroll to the bottom of the Edit page and click the **Add New** link.

35	5811015013	150.00	Edit   Delete
36	5657009013	150.00	Edit   Delete
37	5816003010	150.00	Edit   Delete
38	5657025001	150.00	Edit   Delete
39	5817033032	150.00	Edit   Delete
40	5813005035	150.00	Edit   Delete
41	5815003002	150.00	Edit   Delete
42	5806009003	150.00	Edit   Delete
43	5806019008	150.00	Edit   Delete
44	5808013011	150.00	Edit   Delete
45	5817017051	150.00	Edit   Delete
46	5864021016	150.00	Edit   Delete
47	5814024001	150.00	Edit   Delete
48	5864009021	150.00	Edit   Delete
49	5822031033	150.00	Edit   Delete
50	5817038011	150.00	Edit   Delete
Grand Total	Total TXN CNT 5,987	Total Amount \$898,050.00	
Records per page: 50		<b>Add New</b>	Records: 1 - 50 of 5987 - Pages: 1   2   3   4   5

6O. Enter the parcel number and amount and click the **Save** link to save or **Cancel** to cancel the entry.

36	5657009013	150.00	Edit   Delete
37	5816003010	150.00	Edit   Delete
38	5657025001	150.00	Edit   Delete
39	5817033032	150.00	Edit   Delete
40	5813005035	150.00	Edit   Delete
41	5815003002	150.00	Edit   Delete
42	5806009003	150.00	Edit   Delete
43	5806019008	150.00	Edit   Delete
44	5808013011	150.00	Edit   Delete
45	5817017051	150.00	Edit   Delete
46	5864021016	150.00	Edit   Delete
47	5814024001	150.00	Edit   Delete
48	5864009021	150.00	Edit   Delete
49	5822031033	150.00	Edit   Delete
50	5817038011	150.00	Edit   Delete
	<input type="text" value="8777777777"/>	<input type="text" value="150.00"/>	
Grand Total	Total TXN CNT 5,987	Total Amount \$898,050.00	
Records per page: 50		<b>Save</b> <b>Cancel</b>	Records: 1 - 50 of 5987 - Pages: 1   2   3   4   5

6P. Once the data file has been saved, the new record is added to the end of the list and assigned the next row number.

5974	5812019011	150.00	Edit   Delete
5975	5806007006	150.00	Edit   Delete
5976	5812011027	150.00	Edit   Delete
5977	5816005009	150.00	Edit   Delete
5978	5817030035	150.00	Edit   Delete
5979	5821012001	150.00	Edit   Delete
5980	5815013058	150.00	Edit   Delete
5981	5811016032	150.00	Edit   Delete
5982	5864022013	150.00	Edit   Delete
5983	5817030025	150.00	Edit   Delete
5984	5864006023	150.00	Edit   Delete
5985	5812017005	150.00	Edit   Delete
5986	5822004004	150.00	Edit   Delete
5987	5814013010	150.00	Edit   Delete
5988	5806017704	150.00	Edit   Delete
5991	8777777777	150.00	Edit   Delete
Grand Total	Total TXN CNT 5,988	Total Amount \$898,200.00	
Records per page: 50 Add New - Records: 5951 - 5988 of 5988 - Pages: 116   117   118   119   120			

6Q. To delete a record, click the **Delete** link associated with the row that needs to be deleted.

5974	5812019011	150.00	Edit   Delete
5975	5806007006	150.00	Edit   Delete
5976	5812011027	150.00	Edit   Delete
5977	5816005009	150.00	Edit   Delete
5978	5817030035	150.00	Edit   Delete
5979	5821012001	150.00	Edit   Delete
5980	5815013058	150.00	Edit   Delete
5981	5811016032	150.00	Edit   Delete
5982	5864022013	150.00	Edit   Delete
5983	5817030025	150.00	Edit   Delete
5984	5864006023	150.00	Edit   Delete
5985	5812017005	150.00	Edit   Delete
5986	5822004004	150.00	Edit   Delete
5987	5814013010	150.00	Edit   Delete
5988	5806017704	150.00	Edit   Delete
5991	8777777777	150.00	Edit <b>Delete</b>
Grand Total	Total TXN CNT 5,988	Total Amount \$898,200.00	
Records per page: 50 Add New - Records: 5951 - 5988 of 5988 - Pages: 116   117   118   119   120			

6R. When the pop-up message appears, click **OK** to delete or **Cancel** to keep the record.

5974	5812019011	150.00	Edit   Delete
5975	5806007006	150.00	Edit   Delete
5976	5812011027	150.00	Edit   Delete
5977	5816005009		Edit   Delete
5978	5817030035		Edit   Delete
5979	5821012001		Edit   Delete
5980	5815013058		Edit   Delete
5981	5811016032		Edit   Delete
5982	5864022013		Edit   Delete
5983	5817030025		Edit   Delete
5984	5864006023	150.00	Edit   Delete
5985	5812017005	150.00	Edit   Delete
5986	5822004004	150.00	Edit   Delete
5987	5814013010	150.00	Edit   Delete
5988	5806017704	150.00	Edit   Delete
5991	8777777777	150.00	Edit   Delete
Grand Total	Total TXN CNT 5,988	Total Amount \$898,200.00	

**Message from webpage** ✕

Are you sure you want to delete the parcel?

Records per page:  Add New - Records: 5951 - 5988 of 5988 - Pages: [116](#) | [117](#) | [118](#) | [119](#) | 120

6S. After all of the errors are fixed, new parcels added and old parcels deleted, click the **action drop-down menu** and **select Go Back to Inbox/Check In** to bring you back to the Inbox and automatically check in the file. **Clicking** on the **Inbox** tab will also take you back to the Inbox, but the file will remain checked out. The file can be manually checked in from the Inbox.

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## Edit DA File

Action 
[Select One]  
Go Back to Inbox/Check In  
Submit the File to the Auditor  
Delete  
Reset

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA\_2018\_99999.xls

Remark

6T. If **Valid = 'yes'** then proceed to the next step. In addition, the Parcel Change Report and Data Transmittal can be accessed. If **Valid = 'no'** then repeat steps 6A to 6S.

**DAWeb Auditor-Controller v 2.4.0.0**

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

**Inbox** NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file

Open Search Panel Submit Refresh

Records: 1 - 2 of 2 - Pages: 1

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action	
<input type="checkbox"/>	2018	999.99	DA	6,104	\$2,339,388.29	yes	WORK IN PROGRESS	06/25/2018		3	<a href="#">PCL CHG RPT Data Transmittal</a> History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2018	999.99	PU	1,385	\$1,809,275.89	yes	SENT TO MAINFRAME	06/25/2018	08/23/2018	3	<a href="#">PCL CHG RPT Data Transmittal</a> History/Detail Report Exception Report	Edit Check Out Delete

Records per page: 100

Records: 1 - 2 of 2 - Pages: 1

6U. Click the **PCL CHG RPT** link under the **Report** column to view the Parcel Change Report.

**DAWeb Auditor-Controller v 2.4.0.0**

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

**Inbox** NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file

Open Search Panel Submit Refresh

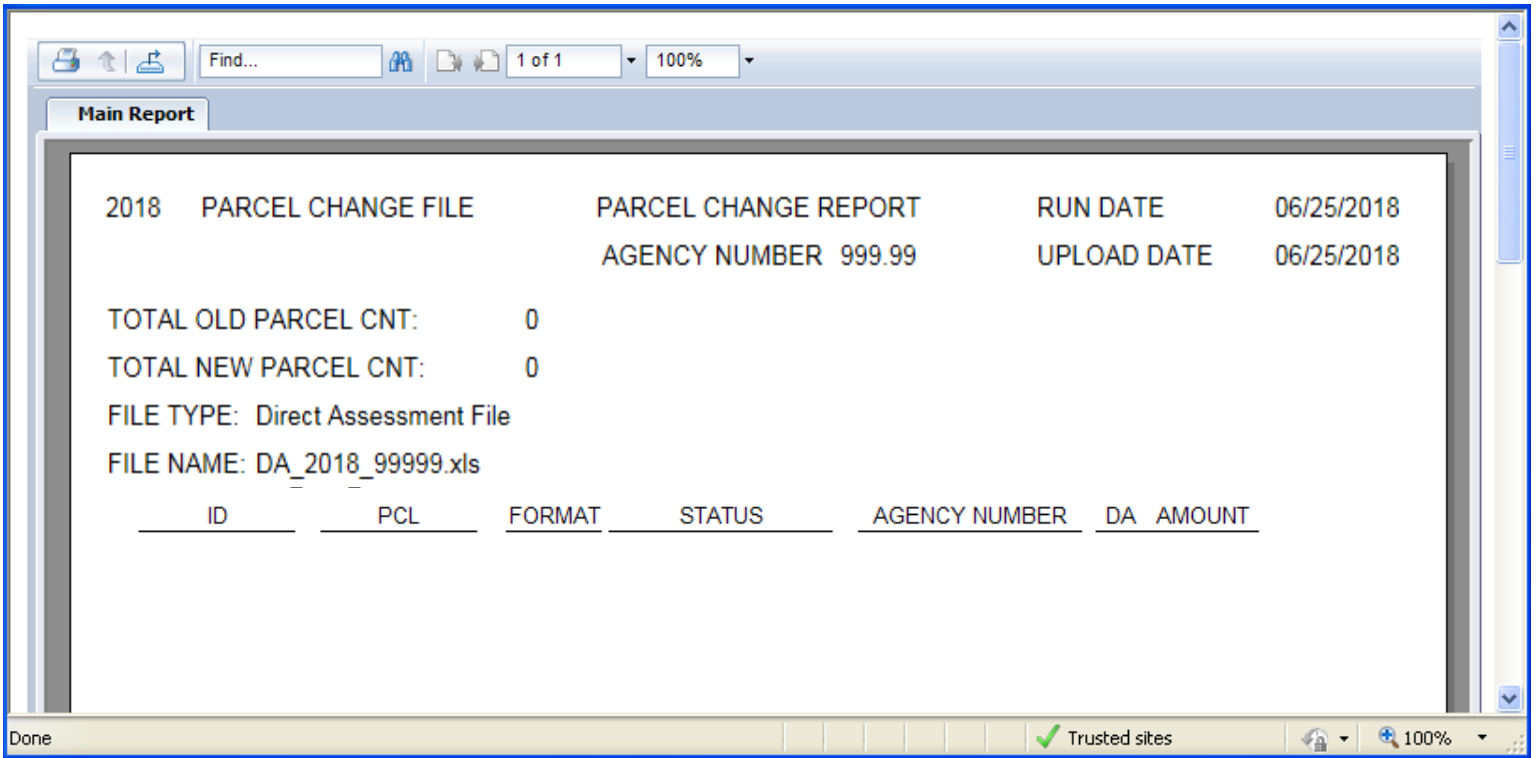
Records: 1 - 2 of 2 - Pages: 1

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action	
<input type="checkbox"/>	2018	999.99	DA	6,104	\$2,339,388.29	yes	WORK IN PROGRESS	06/25/2018		3	<a href="#">PCL CHG RPT Data Transmittal</a> History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2018	999.99	PU	1,385	\$1,809,275.89	yes	SENT TO MAINFRAME	06/25/2018	08/23/2018	3	<a href="#">PCL CHG RPT Data Transmittal</a> History/Detail Report Exception Report	Edit Check Out Delete

Records per page: 100

Records: 1 - 2 of 2 - Pages: 1

**6V. Blank Parcel Change Report** means that there are no parcel changes for the selected file.



**NOTE:** Print or Export (refer to **P. 28**) the **Parcel Change Report** if it is not blank and proceed with the following options:

<ul style="list-style-type: none"> <li>Delete the current file from the Inbox and re-upload new file with parcel changes included in the file</li> </ul>	Go to <b>Create the Excel Input Data File (P. 33)</b> or <b>Create the Text Input Data File (P. 42)</b>
<ul style="list-style-type: none"> <li>Add new parcels and delete old parcels in Edit mode</li> </ul>	Go to <b>Correct the Data File in Edit Mode (P. 66)</b>
<ul style="list-style-type: none"> <li>Complete Upload Original DA File process AND</li> <li>Submit parcel changes as corrections</li> </ul>	Go to <b>Upload Correction File and Correction Data Transmittal (P. 100)</b>

**6W.** Click the Data Transmittal link under the Report column to view the document and verify the Total Parcel Count and DA Amount.



6X. The **Data Transmittal** displays the **File Type, Agency Account Number, Bill Description, Total Assessment Amount and Total Parcel Count** that will be submitted to the Auditor for **STR Update**. If the Data Transmittal does not match your expected totals, then the input file should be reviewed to make sure all parcels are assessed properly. Re-upload a corrected file or make corrections to the existing file in **'Correct the Data File in Edit Mode'** section (P. 66).

**Perform the following steps if the information on the Data Transmittal meets your approval:**

- **Print** the document, **sign and date, fill in all blanks, scan** the document as .PDF format and **upload** the signed document to DAWeb (refer to **'Upload Legal Documents'** section (P.87)).

<b>DATE:</b>	February 17, 2023	
<b>TO:</b>	Department of Auditor-Controller Property Tax Services Division Direct Assessment Unit ATTN: Evelyn Ramirez	

<b>FILE TYPE:</b>	Direct Assessment File
<b>AGENCY ACCOUNT NUMBER:</b>	999.99
<b>BILL DESCRIPTION:</b>	LA County Test
<b>TOTAL ASSESSMENT AMOUNT:</b>	\$2,339,388.29
<b>TOTAL PARCEL COUNT:</b>	6,104

This is to certify that the Total Assessment Amount and Total Parcel Count for our Agency Account Number listed above is correct and that we are authorized to add this Direct Assessment amount onto the Fiscal Year 2018-2019 Secured Tax Roll (STR).

Authorized By:	_____	_____
	Signature	Date Signed
Name and Title:	_____	

If there are any problems relating to the data provided, please call:

Primary Contact:

Name and Title: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

Secondary Contact (if applicable):

Name and Title: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

**Reminder: Please check for exceptions by clicking "DA Exception Report" under Help menu options.**

**NOTE:** The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file. Proceed to the next section: **'Upload Legal Documents'** section (P.87).

**DAWeb** Auditor-Controller v 2.4.0.0

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

**Inbox** NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file

Open Search Panel Submit Refresh

Records: 1 - 2 of 2 - Pages: << 1 >>

	Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
<input type="checkbox"/>	2018	999.99	DA	6,104	\$2,339,388.29	yes	WORK IN PROGRESS	06/25/2018		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2018	999.99	PU	1,385	\$1,809,275.89	yes	SENT TO MAIN NAME	06/25/2018	08/23/2018	3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

Records per page: 100

Records: 1 - 2 of 2 - Pages: << 1 >>

# UPLOAD LEGAL DOCUMENTS

7A. To begin this process, legal documents must be scanned and/or saved as .PDF format and saved onto your computer. **DAWeb only accepts .PDF format.**

**NOTE: Uploading Documents can be done before or after a file is uploaded; however, agency information will not appear in the Inbox until a data file for the respective agency number has been uploaded. All documents will appear on the Document Management page, which will be covered in the 'Check the Status of Legal Documents' section (P. 113).**

7B. To upload legal documents, click the Upload Document tab.

**DAWeb Auditor-Controller v 2.4.0.0**

Inbox Exempt Parcels Upload File Document Management **Upload Document** Create AIS Form

**Inbox** NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file

Open Search Panel Submit Refresh

Records: 1 - 2 of 2 - Pages: 1

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action	
<input type="checkbox"/>	2018	999.99	DA	6,104	\$2,339,388.29	yes		06/25/2018		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2018	999.99	PU	1,385	\$1,809,275.89	yes		06/25/2018	08/23/2018	3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

Records per page: 100

Records: 1 - 2 of 2 - Pages: 1

7C. Click on the drop-down box under Select document type: and select the document type that you want to upload. For this example, Billing Agreement will be selected.

**DAWeb Auditor-Controller v 2.3.3.4**

Options | Log Out | Help

Welcome, Agency User

Inbox Exempt Parcels Upload File Document Management **Upload Document** Create AIS Form

## Upload Document

1. Select document type:

[Select One] ↑

[Select One]

- Billing Agreement
- Resolution/Ordinance
- Agency Information Sheet
- Data Transmittal
- Engineer's / Misc. Report [Supporting doc]



7D. Once the document type is selected, **steps 2 to 3** will appear on the Upload Document page. Perform the following steps:

- Under **step 2**, click on agency number(s) to upload from the list of agency numbers.

**NOTE: Selecting multiple accounts only works for Billing Agreement, Resolution/Ordinance and Engineer's/Miscellaneous document types. To select multiple agency numbers, click on each agency number while holding down the Control (CTRL) button on the keyboard. To deselect the group, click on any agency number without holding down the Control (CTRL) button.**

- Under **step 3**, click the **Validate** button to validate the agency number(s).

The screenshot shows the DAWeb Auditor-Controller interface. The header includes the County of Los Angeles logo, the text 'DAWeb Auditor-Controller v 2.3.3.4', and user options like 'Options | Log Out | Help' and 'Welcome, Agency User'. The navigation menu contains 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. The main content area is titled 'Upload Document' and contains three steps:

- 1. Select document type:** A dropdown menu is set to 'Billing Agreement'.
- 2. Select agency number to upload:** A list of agency numbers is displayed, each with a selection button. The numbers are 444.44, 555.55, 666.66, 777.77, 888.88, 999.90, 999.95, 999.97, 999.98, and 999.99. The selection buttons for 999.95, 999.97, 999.98, and 999.99 are highlighted with a red box.
- 3. Validate selected agency number:** A 'Validate' button is present and highlighted with a red box.

7E. Under **step 4**, click the **Browse** button to upload the document.

**1. Select document type:**  
Billing Agreement

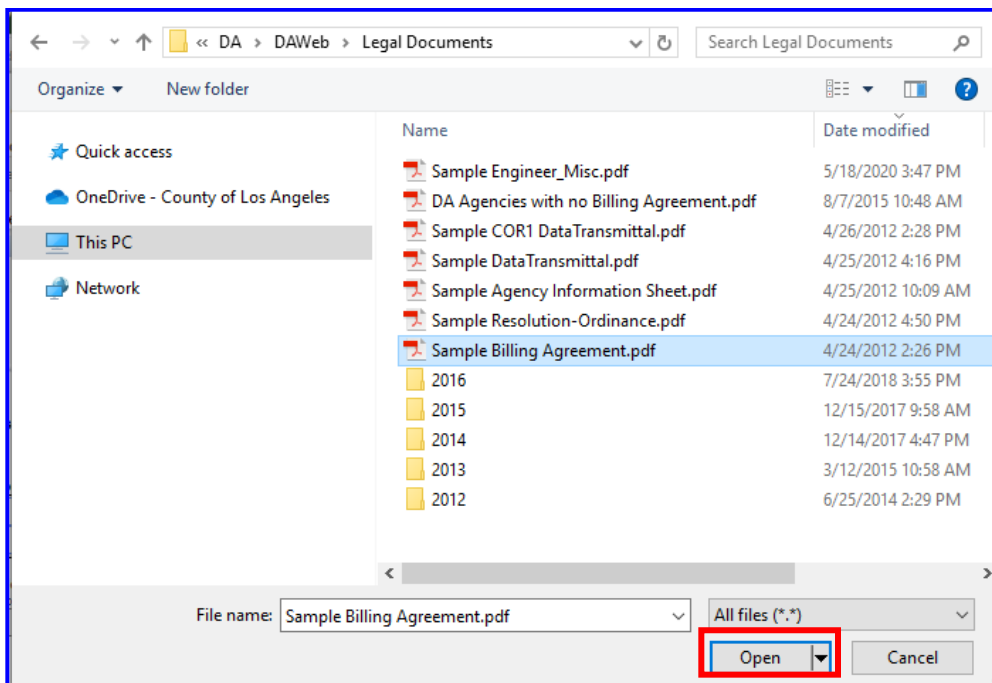
**2. Select agency number to upload:**  
444.44 555.55 666.66 777.77 888.88 > 999.90  
> 999.95 > 999.97 > 999.98 > 999.99

**3. Validate selected agency number**  
Validate

**4. Select Document to upload: PDF Format Only**  
[ no files selected ] **Browse**

**5. Press upload:**  
(Note: Press on Reset to choose a new agency number and file type)  
Upload Reset

7F. Select a .PDF document to upload and click the **Open** button or double click on that document. **Documents must be in .PDF format.**



7G. Under **step 5**, click the **Upload** button to upload the document to DAWeb.

The screenshot shows the DAWeb Auditor-Controller interface. At the top left is the County of Los Angeles logo. The main header features the 'DAWeb Auditor-Controller' logo and version 'v 2.3.3.4'. On the top right, there are links for 'Options | Log Out | Help' and a user greeting 'Welcome, Agency User'. A navigation bar contains links for 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. The main content area is titled 'Upload Document' and is divided into five steps:

- 1. Select document type:** A dropdown menu is set to 'Billing Agreement'.
- 2. Select agency number to upload:** A grid of agency numbers is shown, with '999.90' through '999.99' highlighted in blue.
- 3. Validate selected agency number:** A 'Validate' button is present.
- 4. Select Document to upload: PDF Format Only:** A file named 'Sample Billing Agreement.pdf' (523.16kB) is selected, with a 'Browse' button.
- 5. Press upload:** An 'Upload' button is highlighted with a red box, and a 'Reset' button is also visible.

7H. A message will display at the bottom of the page that the file was successfully uploaded. To continue uploading documents, click the **Reset** button and repeat **steps 7D to 7G**.

Options | Log Out | Help

**DAWeb** Auditor-Controller v 2.3.3.4 Welcome, Agency User

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

## Upload Document

1. Select document type:

Billing Agreement

2. Select agency number to upload:

444.44 555.55 666.66 777.77 888.88 > 999.90  
> 999.95 > 999.97 > 999.98 > 999.99

3. Validate selected agency number

Validate

4. Select Document to upload: **PDF Format Only**

[ no files selected ] Browse

5. Press upload:

(Note: Press on Reset to choose a new agency number and file type)

Upload Reset

**Successfully uploaded file:**  
Sample Billing Agreement.pdf

71. In this example, the document type is **Resolution/Ordinance** and only one agency number is selected. **To select multiple agency numbers**, click on each agency number while holding down the Control (CTRL) button on the keyboard.

**NOTE:** Selecting multiple accounts only works for **Billing Agreement, Resolution/Ordinance** and **Engineer's/Misc report** document type. To deselect the group of selected agency numbers, click on any agency number without holding down the Control (CTRL) button.

The screenshot shows the DAWeb Auditor-Controller interface. At the top left is the County of Los Angeles logo. The main header features the 'DAWeb Auditor-Controller' logo and version 'v 2.3.3.4'. On the top right, there are links for 'Options | Log Out | Help' and a 'Welcome, Agency User' message. A navigation bar contains links for 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. The main content area is titled 'Upload Document' and contains the following steps:

- 1. Select document type:** A dropdown menu is set to 'Resolution/Ordinance'.
- 2. Select agency number to upload:** A grid of agency numbers is shown. The numbers 999.95, 999.97, 999.98, and 999.99 are highlighted with blue buttons, indicating they are selected.
- 3. Validate selected agency number:** A 'Validate' button is present.
- 4. Select Document to upload: PDF Format Only:** A file selection area shows '[ one file selected ]' with a 'Browse' button. Below it, the selected file is 'Sample Resolution-Ordinance.pdf' with a size of '212.93kB'.
- 5. Press upload:** 'Upload' and 'Reset' buttons are visible. A note says '(Note: Press on Reset to choose a new agency number and file type)'. A red-bordered box at the bottom left contains the text: 'Successfully uploaded file: Sample Resolution-Ordinance.pdf'.

7J. In this example, **Agency Information Sheet** is selected. **Only one agency number can be selected per upload since each agency number must have its own Agency Information Sheet.**

Options | Log Out | Help

DAWeb Auditor-Controller v2.3.3.4 Welcome, Agency User

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

## Upload Document

1. Select document type:

Agency Information Sheet

2. Select agency number to upload:

444.44	555.55	666.66	777.77	888.88	999.90
999.95	999.97	999.98	> 999.99		

3. Validate selected agency number

Validate

4. Select Document to upload: **PDF Format Only**

Sample Agency Information Sheet.pdf 173.67kB

5. Press upload:

(Note: Press on Reset to choose a new agency number and file type)

Upload Reset

**Successfully uploaded file:**  
Sample Agency Information Sheet.pdf

7K. A file must be uploaded and valid before uploading the Data Transmittal for the following reasons:

- Data Transmittal document can only be generated after the file has been uploaded and valid.
- The specific Data Transmittal must be linked to the co-responding agency number and file type.

The screenshot shows the DAWeb Auditor-Controller interface. At the top left is the County of Los Angeles logo. The main header features the 'DAWeb' logo in large yellow and white text, followed by 'Auditor-Controller' and version 'v 2.3.3.4'. On the right, there are links for 'Options | Log Out | Help' and a welcome message 'Welcome, Agency User'. A navigation bar contains 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. The 'Upload Document' page has a title and a red note: 'NOTE: Please do not upload document(s) for account(s) that are not submitting.' Step 1: 'Select document type:' with a dropdown menu showing 'Data Transmittal'. Step 2: 'Select agency number and file type to upload:' with a table:

Fiscal Year	Agency #	File Type
> 2018	999.99	DA
2018	999.99	PU

Step 3: 'Validate selected agency number and file type' with a 'Validate' button. Step 4: 'Select Document to upload: PDF Format Only' with a file selection area showing '[ no files selected ]' and a 'Browse' button. Step 5: 'Press upload:' with a note '(Note: Press on Reset to choose a new agency number and file type)' and 'Upload' and 'Reset' buttons. A red-bordered box at the bottom contains the text: 'Successfully uploaded file: Sample DataTransmittal.pdf'.

7L. The **Engineer's/Miscellaneous report** is a supporting document that provides additional information to the Auditor. **It is not a required legal document to submit your file. However, agencies will need to upload an Engineer's/Miscellaneous report if the Resolution/Ordinance does not clearly state how the amounts being billed are derived.** Agencies can submit multiple Engineer's/Miscellaneous reports as needed. Please refer to page 114 Document Detail as an example.

The screenshot displays the DAWeb Auditor-Controller interface. At the top left is the County of Los Angeles logo. The main header features the 'DAWeb Auditor-Controller' logo and version 'v 2.3.3.4'. On the top right, there are links for 'Options | Log Out | Help' and a welcome message 'Welcome, Agency User'. A navigation bar includes 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. The main content area is titled 'Upload Document' and contains five steps:

- 1. Select document type:** A dropdown menu is set to 'Engineer's / Misc. Report [Supporting doc]'.
- 2. Select agency number to upload:** A grid of agency numbers is shown, with '999.90' selected. The numbers are: 444.44, 555.55, 666.66, 777.77, 888.88, 999.90, 999.95, 999.97, 999.98, 999.99.
- 3. Validate selected agency number:** A 'Validate' button is present.
- 4. Select Document to upload: PDF Format Only:** A file named 'Sample Engineers-Misc report.pdf' (212.93kB) is selected, with a 'Browse' button.
- 5. Press upload:** 'Upload' and 'Reset' buttons are shown. A note says '(Note: Press on Reset to choose a new agency number and file type)'. A red-bordered box at the bottom states: 'Successfully uploaded file: Sample Engineers-Misc report.pdf'.



7M. Click the **Inbox** tab to go back to the Inbox.

7N. If the file(s) are valid and the document counter under the Docs column is equal to '4', then check the checkbox and click the **Submit** button. Multiple files can be checked and submitted simultaneously.

**NOTE:** The Inbox only shows agency number 999.99 even though other agencies numbers were selected in the upload document page. **Agency information will not appear in the Inbox until a data file for the respective agency number has been uploaded. All documents will appear on the Document Management page, which will be covered in the 'Check the Status of Legal Documents' section (P. 113).**

Also, The Engineer's/Miscellaneous report is not included in the counter since it is not a required legal document.

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
2023	999.99	DA	6,104	\$2,339,388.29	yes	WORK IN PROGRESS	02/17/2023		4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
2023	999.99	PU	1,385	\$1,809,275.89	yes	WORK IN PROGRESS	02/17/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

70. Press **OK** to submit or **Cancel** to cancel the submission.

The screenshot shows the DAWeb Auditor-Controller interface. At the top, there is a navigation bar with the DAWeb logo and the text 'Auditor-Controller v 2.4.0.0'. Below the navigation bar, there are several tabs: 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. The 'Inbox' tab is selected, and a red note reads: 'NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file'. Below the note, there are buttons for 'Open Search Panel', 'Submit', and 'Refresh'. A table displays two records for fiscal year 2023, agency # 999.99. The first record is for a DA file type with 6,104 transactions and a total DA AMT of \$2,339,388.29. The second record is for a PU file type with 1,385 transactions and a total DA AMT of \$1,809,275.89. Both records have a 'Valid' status of 'yes' and a 'Status' icon of a clipboard with 'WORK IN PROGRESS'. A yellow dialog box is overlaid on the table, asking: 'Are you sure you want to submit the following file(s)? 999.99 DA'. The dialog box has 'Ok' and 'Cancel' buttons.

7P. A pop-up message states 'File(s) submitted', the status icons changed to 'Pending Review' and the links under the Action column have been disabled. Submitted files cannot be edited, checked out or deleted while under review. Contact the Auditor if you notice that the file needs to be edited or deleted and they will reject the file back to you.

The screenshot shows the DAWeb Auditor-Controller interface after a submission. The 'Inbox' tab is selected, and a yellow message box at the top left says 'File(s) submitted'. The table below shows the same two records as in the previous screenshot, but the status icons have changed. The first record now has a 'PENDING REVIEW' icon, and the second record has a 'WORK IN PROGRESS' icon. The 'Action' column links are now disabled. The table headers include 'Fiscal Year', 'Agency #', 'File Type', 'TXN Count', 'Total DA AMT', 'Valid', 'Status', 'Upload Date', 'Submit Date', 'Docs', 'Report', and 'Action'. The 'Report' column contains the text 'PCL CHG RPT Data Transmittal History/Detail Report Exception Report'. The 'Action' column contains 'Edit', 'Check Out', and 'Delete' links. The 'Records' column shows '4' for the first record and '3' for the second record. The 'Status' column shows 'yes' for both records. The 'Upload Date' and 'Submit Date' are both '02/17/2023'. The 'Records per page' is set to '100'.

7Q. Auditor staff will review the submitted file(s) and uploaded documents. If everything is approved the file will be submitted into the Wednesday or Saturday STR Updates. If there is anything wrong with the file and/or legal documents then the Auditor staff will reject the file and/or documents back to the Agency for editing.

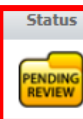
7R. If you receive an email saying, "Please note that one or more of your documents have been denied via the DAWeb site," review the documents you uploaded to see why it was rejected and reupload the correct documents as soon as possible. (Refer to Section 9: Check the Status of Legal Documents for more information)

**NOTE:** Log onto DAWeb to check the **status of your Agency data file(s)**.

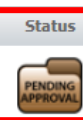
- **Work in Progress** – Agency is working on the file before it is submitted to the Auditor.

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
<input type="checkbox"/> 2023	999.99	DA	6,104	\$2,339,388.29	yes		02/17/2023	02/17/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

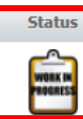

- **Pending Review** – User submitted agency file to Auditor and waiting for Auditor staff to review.

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
<input type="checkbox"/> 2023	999.99	DA	6,104	\$2,339,388.29	yes		02/17/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

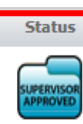
- **Pending Approval** – Auditor staff reviewed and submitted agency file to Auditor supervisor for approval.

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
<input type="checkbox"/> 2023	999.99	DA	6,104	\$2,339,388.29	yes		02/17/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

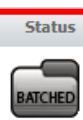
- **Auditor Rejected File Back to Agency** – A red flag with status of ‘Work in Progress’ indicates that Auditor staff or supervisor rejected the file back to the Agency Inbox. Click the **Edit** link to read the Auditor comments inside the **Remark box**.
  - This action cannot be done after the Supervisor approves the file.
  - Any corrections after the Supervisor approves the file must be sent in as a correction (COR) file

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
<input type="checkbox"/>  2023	999.99	DA	6,104	\$2,339,388.29	yes		02/17/2023	02/17/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	 Edit Check Out Delete

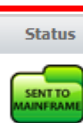
- **Supervisor Approved** – Auditor supervisor approved and submitted agency file to Batching.

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
<input type="checkbox"/> 2023	999.99	DA	6,104	\$2,339,388.29	yes		02/17/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

- **Batched** – The approved agency file has been processed/formatted and is ready to be batched into a Mainframe file for STR processing.

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
<input type="checkbox"/> 2023	999.99	DA	6,104	\$2,339,388.29	yes		02/17/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

- **Sent to Mainframe** – The agency file has been sent to the Mainframe and will be processed in the STR Update.

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
<input type="checkbox"/> 2023	999.99	DA	6,104	\$2,339,388.29	yes		02/17/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

**NOTE:** Click the **Refresh** button periodically to update the **Status** and **Docs** columns. The Status and Docs columns will not update if you are in the Inbox while the Auditor is updating the status of your files and/or documents.

**DAWeb Auditor-Controller v2.4.0.0**

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form Report FTP Administration E-Mail

**Inbox** NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file

Open Search Panel Submit Refresh

Records: 1 - 2 of 2 - Pages: 1

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
<input type="checkbox"/> 2023	999.99	DA	6,104	\$2,339,388.29	yes		02/17/2023	02/17/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/> 2023	999.99	PU	1,385	\$1,809,275.89	yes		02/17/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

Records per page: 100

Records: 1 - 2 of 2 - Pages: 1

# UPLOAD CORRECTION FILE AND CORRECTION DATA TRANSMITTAL

**IMPORTANT MESSAGE:** Only current year corrections may be submitted during this period. The second Tuesday in September is the last date to submit corrections without getting charged \$13 per parcel. Only one correction file per Agency number and per File Type should be submitted before each Wednesday and Saturday STR Update.

**8A.** To upload a DA or PU correction (COR) file, click the Upload File tab.

**NOTE:** The Inbox below already contains one COR file (COR v1) to show you what happens when multiple COR files are submitted for the same agency number.

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action	
<input type="checkbox"/>	2023	999.99	DA COR v1	5	\$0.00	no	WORK IN PROGRESS	03/06/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	DA	6,104	\$2,339,388.29	yes	PENDING REVIEW	02/17/2023	02/17/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	PU	1,385	\$1,809,275.89	yes	WORK IN PROGRESS	02/17/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

**8B.** Perform the following upload steps:

1. **Select the type of file** (Correction File) to upload.
2. **Enter Agency number** to upload. Agency number must be 5 digits and in 2 decimal format.
3. Click the Validate button.

**Upload File**

1. Select File Type:

- Direct Assessment File
- Public Utility File
- Correction Direct Assessment File
- Correction Public Utility File
- Exempt Parcels File

2. Enter agency number to upload:

Must be 5 digits and in 2 decimal format (xxx.xx)

3. Validate agency number:

8C. Click the **Browse** button in step 4, select a correction file to upload and click the **Open** button.

Options | Log Out | Help

v 2.3.3.4 Welcome, Agency User

Create AIS Form

File name: COR\_99999.xlsx All Files (\*.\*)

Open Cancel

[ no files selected ] Browse

5. Press upload:  
(Note: Press on Reset to choose a new file type and agency number)

Upload Reset

8D. Click the **Upload** button after the file has been selected.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

## Upload File

1. Select File Type:

Direct Assessment File

Public Utility File

Correction Direct Assessment File

Correction Public Utility File

Exempt Parcels File

2. Enter agency number to upload:

999.99

Must be 5 digits and in 2 decimal format (xxx.xx)

3. Validate agency number:

Validate

4. Select File to upload:

COR\_99999.xlsx Browse

7.86kB

5. Press upload:  
(Note: Press on Reset to choose a new file type and agency number)

Upload Reset

8E. A **message** will pop up under the Upload button after the file loaded successfully. To view the uploaded file(s), click the **Inbox** tab.

**WARNING: Only one correction file per Agency number should be submitted before each Wednesday and Saturday STR Update.**

**DAWeb** Auditor-Controller v 2.4.0.0

**Inbox** Exempt Parcels Upload File Document Management Upload Document Create AIS Form

## Upload File

1. Select File Type:

- Direct Assessment File
- Public Utility File
- Correction Direct Assessment File
- Correction Public Utility File
- Exempt Parcels File

2. Enter agency number to upload:

Must be 5 digits and in 2 decimal format (xxx.xx)

3. Validate agency number:

Successfully uploaded files:  
COR\_99999.xlsx



8F. The example below shows the Inbox with the **Fiscal Year (2023)**, **Agency number**, **File Type (DA COR v2)** and **Status (Work in Progress)** and **Docs** counter is '3'. The File Type version for each additional correction file will increment by 1. Proceed to the next step if Valid = 'yes'. If Valid = 'no,' then proceed to 'Correct the Data File in Edit Mode' section (P. 66)

**NOTE:** The **Billing Agreement, Resolution/Ordinance, Agency Information Sheet** and **Engineer's/Miscellaneous report** documents do not need to be re-uploaded since they were already uploaded to the original D.A. or P.U. files. These documents will be automatically linked to the COR files.

Inbox												
NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file												
Open Search Panel   Submit   Refresh												
Records: 1 - 4 of 4 - Pages: 1												
Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action	
<input type="checkbox"/>	2023	999.99	DA COR v1	2	\$110.00	yes	WORK IN PROGRESS	03/06/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	DA COR v2	2	\$10.00	no	WORK IN PROGRESS	03/06/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check In Delete
<input type="checkbox"/>	2023	999.99	DA	6,104	\$2,339,388.29	yes	PENDING REVIEW	02/17/2023	02/17/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	PU	1,385	\$1,809,275.89	yes	WORK IN PROGRESS	02/17/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

8G. Click the **PCL CHG RPT** link under **Report** to retrieve the Parcel Change Report.

Inbox												
NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file												
Open Search Panel   Submit   Refresh												
Records: 1 - 4 of 4 - Pages: 1												
Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action	
<input type="checkbox"/>	2023	999.99	DA COR v1	2	\$110.00	yes	WORK IN PROGRESS	03/06/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	DA COR v2	2	\$10.00	no	WORK IN PROGRESS	03/06/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check In Delete
<input type="checkbox"/>	2023	999.99	DA	6,104	\$2,339,388.29	yes	PENDING REVIEW	02/17/2023	02/17/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	PU	1,385	\$1,809,275.89	yes	WORK IN PROGRESS	02/17/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete



**8H. A blank Parcel Change Report** means that there are no parcel changes for the respective agency. Click the 'X' to close the report window and proceed to the next step.

**Main Report**

2023 PARCEL CHANGE FILE PARCEL CHANGE REPORT RUN DATE 03/06/2023  
 AGENCY NUMBER 999.99 UPLOAD DATE 03/06/2023

TOTAL OLD PARCEL CNT: 0  
 TOTAL NEW PARCEL CNT: 0  
 FILE TYPE: Direct Assessment Correction File version 1  
 FILE NAME: COR\_99999.xlsx

ID	PCL	FORMAT	STATUS	AGENCY NUMBER	DA AMOUNT
----	-----	--------	--------	---------------	-----------

**NOTE:** Print or Export (refer to P. 28) the **Parcel Change Report** if it is not blank and proceed with the following options:

<ul style="list-style-type: none"> <li>Delete the current file from the Inbox and re-upload new file with parcel changes included in the file</li> </ul>	Go to <b>Create the Excel Input Data File (P. 33)</b> or <b>Create the Text Input Data File (P. 42)</b>
<ul style="list-style-type: none"> <li>Add new parcels and delete old parcels in Edit mode</li> </ul>	Go to <b>Correct the Data File in Edit Mode (P. 66)</b>
<ul style="list-style-type: none"> <li>Complete Upload Original DA File process AND</li> <li>Submit parcel changes as corrections</li> </ul>	Go to <b>Upload Correction File and Correction Data Transmittal (P. 100)</b>

**8I.** Click the Data Transmittal link under **Report** to verify the Total Parcel Count and DA Amount.

**Inbox** NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file

Open Search Panel Submit Refresh

Records: 1 - 4 of 4 - Pages: 1

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action	
<input type="checkbox"/>	2023	999.99	DA COR v1	2	\$110.00	yes	WORK IN PROGRESS	03/06/2023	3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete	
<input type="checkbox"/>	2023	999.99	DA COR v2	2	\$10.00	no	WORK IN PROGRESS	03/06/2023	3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check In Delete	
<input type="checkbox"/>	2023	999.99	DA	6,104	\$2,339,388.29	yes	PENDING REVIEW	02/17/2023	02/17/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	PU	1,385	\$1,809,275.89	yes	WORK IN PROGRESS	02/17/2023	3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete	

Records per page: 100 Records: 1 - 4 of 4 - Pages: 1

8J. The **Data Transmittal** displays the **File Type, Agency Account Number, Bill Description, Total Assessment Amount and Total Parcel Count** that will be submitted to the Auditor for **STR Update**. If the Data Transmittal does not match your expected totals then the input file should be reviewed to make sure all parcels are assessed properly and re-upload a corrected file or make corrections to the existing file (see '**Correct the Data File in Edit Mode**' section, **P. 66**).

**Perform the following steps if the information on the Data Transmittal meets your approval:**

- **Print** the document, **sign and date**, **fill in all blanks**, **scan** the document as .PDF format and **upload** the signed document to DAWeb.

<b>DATE:</b>	<b>March 06, 2023</b>	
<b>TO:</b>	Department of Auditor-Controller Property Tax Services Division Direct Assessment Unit <b>ATTN: Evelyn Ramirez</b>	
<b>FILE TYPE:</b>	<b>Direct Assessment Correction File version 1</b>	
<b>AGENCY ACCOUNT NUMBER:</b>	<b>999.99</b>	
<b>BILL DESCRIPTION:</b>	<b>LA County Test</b>	
<b>TOTAL ASSESSMENT AMOUNT:</b>	<b>\$110.00</b>	
<b>TOTAL PARCEL COUNT:</b>	<b>2</b>	
<p>This is to certify that the Total Assessment Amount and Total Parcel Count for our Agency Account Number listed above is correct and that we are authorized to add this Direct Assessment amount onto the Fiscal Year 2023-2024 Secured Tax Roll (STR).</p>		
Authorized By:	_____	_____
	<b>Signature</b>	<b>Date Signed</b>
Name and Title:	_____	
<b>If there are any problems relating to the data provided, please call:</b>		
Primary Contact:		
Name and Title:	_____	
Phone Number:	_____	
Email Address:	_____	
Secondary Contact (if applicable):		
Name and Title:	_____	
Phone Number:	_____	
Email Address:	_____	
<b>Reminder: Please check for exceptions by clicking "DA Exception Report" under Help menu options.</b>		

8K. To upload the Data Transmittal, click the **Upload Document** tab.

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action	
<input type="checkbox"/>	2023	999.99	DA COR v1	2	\$110.00	yes		03/06/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	DA COR v2	2	\$10.00	no		03/06/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check In Delete
<input type="checkbox"/>	2023	999.99	DA	6,104	\$2,339,388.29	yes		02/17/2023	02/17/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	PU	1,385	\$1,809,275.89	yes		02/17/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

8L. Under step 1, click the **'Select document type:'** drop down box and select **Data Transmittal**. Once the document type is selected, steps 2 to 3 will appear on the Upload Document page.

Options | Log Out | Help

**DAWeb** Auditor Controller v2.2.2.4 Welcome, Agency User

Inbox Exempt Parcels Upload File Document Management **Upload Document** Create AIS Form

## Upload Document

1. Select document type:

[Select One] ↑

- [Select One]
- Billing Agreement
- Resolution/Ordinance
- Agency Information Sheet
- Data Transmittal**
- Engineer's / Misc. Report [Supporting doc]

**8M.** Perform the following steps:

- Under step 2, select the agency number and file type to upload.
- Under step 3, click the **Validate** button.

NOTE: Make sure that the agency number and file type on the Data Transmittal matches the agency number and file type you are selecting.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

## Upload Document

1. Select document type:

Data Transmittal

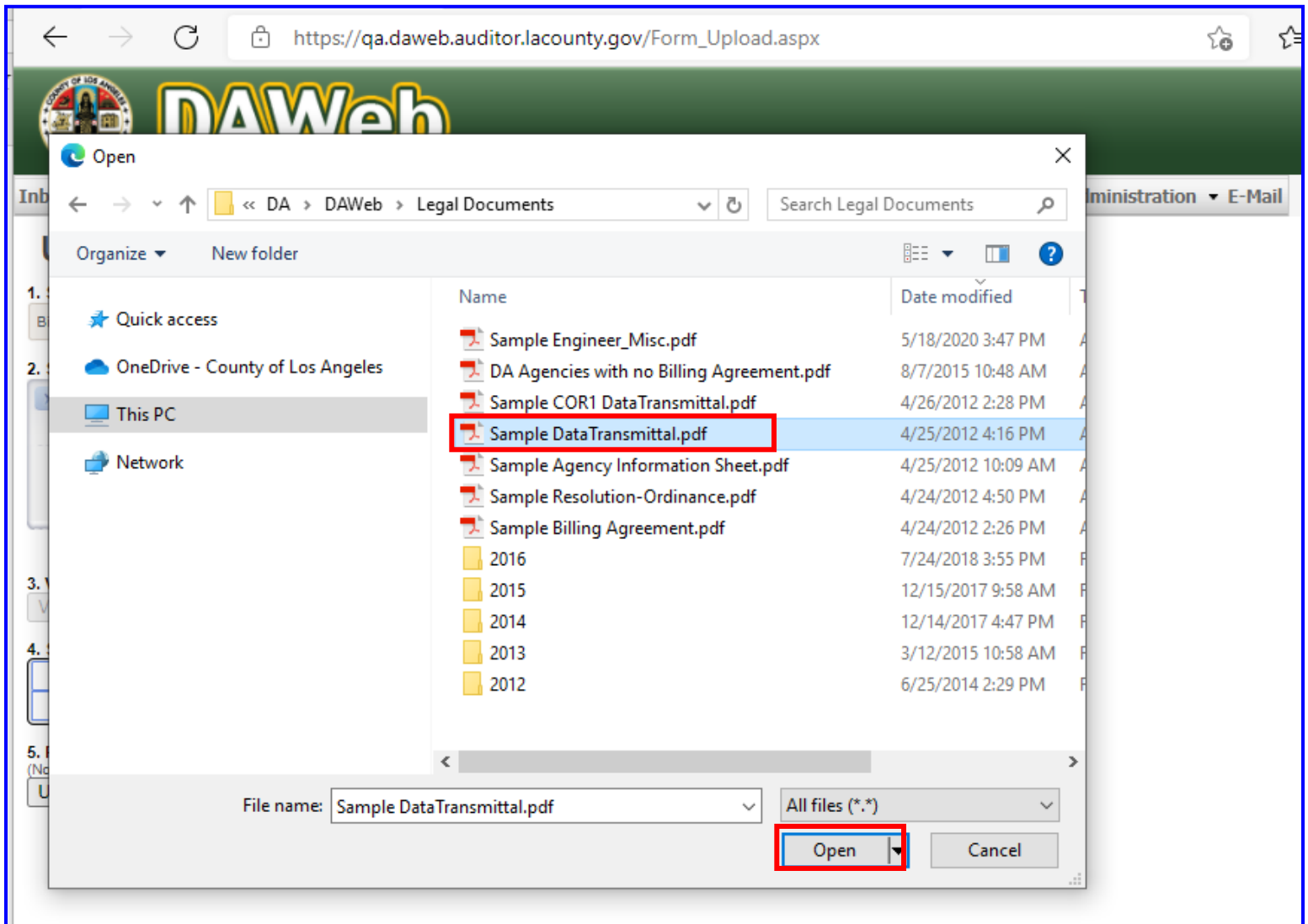
2. Select agency number and file type to upload:

Fiscal Year	Agency #	File Type
2023	999.99	PU
2023	999.99	DA COR v1
> 2023	999.99	DA COR v2

3. Validate selected agency number and file type

Validate

8N. Under **step 4**, click the **Browse** button, select a .PDF document to upload and click the **Open** button or double click the document selected. **Documents must be in .PDF format.**



80. Under **step 5**, click the **Upload** button to upload the document to DAWeb.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

## Upload Document

1. Select document type:

Data Transmittal

2. Select agency number and file type to upload:

Fiscal Year	Agency #	File Type
2023	999.99	PU
2023	999.99	DA COR v1
> 2023	999.99	DA COR v2

3. Validate selected agency number and file type

Validate

4. Select Document to upload: **PDF Format Only**

Sample DataTransmittal.pdf

37.68kB

5. Press upload:

(Note: Press on Reset to choose a new agency number and file type)

8P. A message will display at the bottom of the page that the file was successfully uploaded. Click the **Inbox** tab to go back to the Inbox.

**Inbox** Exempt Parcels Upload File Document Management Upload Document Create AIS Form

# Upload Document

1. Select document type:

Data Transmittal

2. Select agency number and file type to upload:

Fiscal Year	Agency #	File Type
2023	999.99	PU
2023	999.99	DA COR v1
> 2023	999.99	DA COR v2

3. Validate selected agency number and file type

Validate

4. Select Document to upload: **PDF Format Only**

[ no files selected ] Browse

5. Press upload:

(Note: Press on Reset to choose a new agency number and file type)

Upload Reset

**Successfully uploaded file:**  
Sample DataTransmittal.pdf

8Q. If the file(s) are **Valid = 'yes'** and the document counter under the **Docs** column is equal to **'4'**, then check the checkbox and click the **Submit** button. Multiple files can be checked and submitted simultaneously.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

**Inbox** NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file

Open Search Panel **Submit** Refresh

Records: 1 - 4 of 4 - Pages: << 1 >>

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action	
<input checked="" type="checkbox"/>	2023	999.99	DA COR v2	1	\$10.00	yes	WORK IN PROGRESS	03/06/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	DA COR v1	2	\$110.00	yes	WORK IN PROGRESS	03/06/2023		4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	PU	1,385	\$1,809,275.89	yes	WORK IN PROGRESS	02/17/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	DA	6,104	\$2,339,388.29	yes	SUPERVISOR APPROVED	02/17/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

Records per page: 100

Records: 1 - 4 of 4 - Pages: << 1 >>

8R. Press **OK** to submit or **Cancel** to cancel the submission.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

**Inbox** NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file

Open Search Panel Submit Refresh

Records: 1 - 4 of 4 - Pages: << 1 >>

Fiscal Year	Agency #	File Type	TXN Count	Date	Docs	Report	Action					
<input type="checkbox"/>	2023	999.99	DA COR v2	2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete					
<input type="checkbox"/>	2023	999.99	DA COR v1		4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete					
<input type="checkbox"/>	2023	999.99	PU	1,385	3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete					
<input type="checkbox"/>	2023	999.99	DA	6,104	\$2,339,388.29	yes	SUPERVISOR APPROVED	02/17/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

Records per page: 100

Records: 1 - 4 of 4 - Pages: << 1 >>

Are you sure you want to submit the following file(s)?  
999.99 DA COR v2

Ok Cancel



8S. A pop-up message states 'File(s) submitted', the status icon changed to 'Pending Review,' a 'Submit Date' appears, and the links under the Action column have been disabled. Submitted files cannot be edited, checked out or deleted while under review. Contact the Auditor if you notice that the file needs to be edited or deleted and they will reject the file back to you.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

**Inbox** NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file

Open Search Panel Submit Refresh

File(s) submitted

Records: 1 - 4 of 4 - Pages: 1

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action	
<input type="checkbox"/>	2023	999.99	DA COR v2	1	\$10.00	yes		03/06/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	<input type="button" value="Edit"/> <input type="button" value="Check Out"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	2023	999.99	DA COR v1	2	\$110.00	yes		03/06/2023		4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	<input type="button" value="Edit"/> <input type="button" value="Check Out"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	2023	999.99	PU	1,385	\$1,809,275.89	yes		02/17/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	<input type="button" value="Edit"/> <input type="button" value="Check Out"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	2023	999.99	DA	6,104	\$2,339,388.29	yes		02/17/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	<input type="button" value="Edit"/> <input type="button" value="Check Out"/> <input type="button" value="Delete"/>

Records per page: 100 Records: 1 - 4 of 4 - Pages: 1

8T. Auditor staff will review the submitted file(s) and will process into the STR Update if the Data Transmittal's count and amount match the file's count and amount. If there is anything wrong with the file or if the count and amount do not match, then the Auditor staff will reject the file back to the Agency for editing.

8U. If you receive an email notification saying, "Please note that one or more of your documents have been denied via the DAWeb site,' please review the documents uploaded to see why it was rejected on Document Management and reupload with the correct files as soon as possible (Refer to Section 9: Check the Status of Legal Documents for more information)

## CHECK THE STATUS OF LEGAL DOCUMENTS

**9A.** Go to the **Inbox** to check on uploaded documents. Document management can also be used and will be explained in this section (**step 9D, P. 115**).

- The **Docs** column displays the number of documents uploaded for each agency number. The font color comes in **black**, **green** or **red**.
  - **Black** – the documents have been uploaded and are pending for Auditor review.
  - **Green** – all four documents have been approved.
  - **Red** – at least one document has been denied by the Auditor.

**NOTE:** Since the Inbox is file driven, it will not display documents uploaded if the files have not been uploaded. All documents are displayed on the Document Management page.

Inbox												
NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file												
<input type="button" value="Open Search Panel"/> <input type="button" value="Submit"/> <input type="button" value="Refresh"/>												
Records: 1 - 4 of 4 - Pages: 1												
Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action	
<input type="checkbox"/>	2023	999.99	DA	6,104	\$2,339,388.29	yes		02/17/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	DA COR v1	2	\$110.00	yes		03/06/2023		4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	DA COR v2	1	\$10.00	yes		03/06/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	PU	1,385	\$1,809,275.89	yes		02/17/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
Records per page: 100												
Records: 1 - 4 of 4 - Pages: 1												

**9B.** Click on any number under the 'Docs' column to go to the 'Document Detail' page.

Inbox												
NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file												
<input type="button" value="Open Search Panel"/> <input type="button" value="Submit"/> <input type="button" value="Refresh"/>												
Records: 1 - 4 of 4 - Pages: 1												
Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action	
<input type="checkbox"/>	2023	999.99	DA	6,104	\$2,339,388.29	yes		02/17/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	DA COR v1	2	\$110.00	yes		03/06/2023		4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	DA COR v2	1	\$10.00	yes		03/06/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/>	2023	999.99	PU	1,385	\$1,809,275.89	yes		02/17/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
Records per page: 100												
Records: 1 - 4 of 4 - Pages: 1												

9C. The 'Document Detail' page shows the details of your document(s) and displays the **Required Legal Documents** and **Supporting Document** tables. Click the **link(s)** under the **Document Type** column to display the document. Click the **Back** button to go back to the Inbox.

**NOTE:** The **Required Legal Documents** table will be displayed regardless of whether documents are uploaded or not. However, the Supporting Document table will only appear if an Engineer/Miscellaneous report is uploaded.

## Document Detail

Back

Fiscal Year 2023  
 Agency Number 999.99  
 Bill Description LA County Test  
 File Type Direct Assessment Correction File version 1  
 File Name COR\_99999.xlsx

**Required Legal Documents**

Document Type	Status	Comment	Uploaded By	Uploaded Date	Updated By	Updated Date
<a href="#">Agency Information Sheet</a>	Approved		User, Agency	02/17/2023	User, Auditor	03/28/2023
<a href="#">Billing Agreement</a>	Approved		User, Agency	02/17/2023	User, Auditor	03/28/2023
<a href="#">Data Transmittal</a>	Denied	Missing Bill Description	User, Test	03/28/2023	User, Auditor	03/28/2023
<a href="#">Resolution/Ordinance</a>	Approved		User, Agency	02/17/2023	User, Auditor	03/28/2023

**Supporting Document**

Document Type	Status	Comment	Uploaded By	Uploaded Date	Updated By	Updated Date
<a href="#">Engineer/Misc 1</a>	Pending for Review		User, Auditor	03/28/2023		

**NOTE:** Listed below are **descriptions of the Document Detail** page.

<b>Document Type</b>	List of the four required legal documents and supporting documents.
<b>Status</b>	<b>Not Uploaded, Pending Review, Approved, Denied and Not Required.</b> Not Required status only applies to a few agency account numbers that are not required to submit a Billing Agreement. These agencies will only need to submit the other three legal documents.
<b>Comment</b>	Reasons for documents denied by the Auditor.
<b>Uploaded By</b>	Displays the name of the person that uploaded the first document.
<b>Uploaded Date</b>	Displays the date the first document was uploaded.
<b>Updated By</b>	Displays the name of person that last uploaded a later document or updated the status.
<b>Updated Date</b>	Displays the date of the last upload or update.

9D. The 'Document Management' page is another method of checking documents in a list format. The documents are automatically sorted by Agency number. This page has a delete function in case you need to delete and re-upload document(s) that have been denied.

**NOTE: The Delete function is disabled on approved documents.** Contact the Auditor staff if you need to delete an approved document; they must update the status to 'denied' before you can delete.

DAWeb Auditor-Controller v 2.4.0.0

Inbox Exempt Parcels Upload File **Document Management** Upload Document Create AIS Form

## Document Management

Open Search Panel Export to Excel Refresh

Records: 1 - 7 of 7 - Pages: 1

Drag a column header here to group by that column.

Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
2023	999.99	LA County Test	Billing Agreement	Approved		View History	Delete
2023	999.99	LA County Test	Resolution/Ordinance	Approved		View History	Delete
2023	999.99	LA County Test	Agency Information Sheet	Approved		View History	Delete
2023	999.99	LA County Test	Data Transmittal - DA	Approved		View History	Delete
2023	999.99	LA County Test	Data Transmittal - DA COR v1	Denied	Missing Bill Description	View History	Delete
2023	999.99	LA County Test	Engineer/Misc 1 - DA COR v2	Pending for Review		View History	Delete
2023	999.99	LA County Test	Engineer/Misc 1	Pending for Review		View History	Delete

Records per page: 100 Records: 1 - 7 of 7 - Pages: 1

9E. Click the **View** link under the **Report** column link to display the uploaded document.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

## Document Management

Open Search Panel Export to Excel Refresh

Records: 1 - 7 of 7 - Pages: 1

Drag a column header here to group by that column.

Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
2023	999.99	LA County Test	Billing Agreement	Approved		<a href="#">View</a> <a href="#">History</a>	<a href="#">Delete</a>
2023	999.99	LA County Test	Resolution/Ordinance	Approved		<a href="#">View</a> <a href="#">History</a>	<a href="#">Delete</a>
2023	999.99	LA County Test	Agency Information Sheet	Approved		<a href="#">View</a> <a href="#">History</a>	<a href="#">Delete</a>
2023	999.99	LA County Test	Data Transmittal - DA	Approved		<a href="#">View</a> <a href="#">History</a>	<a href="#">Delete</a>
2023	999.99	LA County Test	Data Engineer/Misc 1 R v1	Denied	Missing Bill Description	<a href="#">View</a> <a href="#">History</a>	<a href="#">Delete</a>
2023	999.99	LA County Test	Data Transmittal - DA COR v2	Pending for Review		<a href="#">View</a> <a href="#">History</a>	<a href="#">Delete</a>
2023	999.99	LA County Test	Engineer/Misc 1	Pending for Review		<a href="#">View</a> <a href="#">History</a>	<a href="#">Delete</a>

Records per page: 100 Records: 1 - 7 of 7 - Pages: 1

9F. To track the history of the document, click the History link.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

## Document Management

Open Search Panel Export to Excel Refresh

Records: 1 - 7 of 7 - Pages: 1

Drag a column header here to group by that column.

Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
2023	999.99	LA County Test	Billing Agreement	Approved		<a href="#">View</a> <a href="#">History</a>	<a href="#">Delete</a>
2023	999.99	LA County Test	Resolution/Ordinance	Approved		<a href="#">View</a> <a href="#">History</a>	<a href="#">Delete</a>
2023	999.99	LA County Test	Agency Information Sheet	Approved		<a href="#">View</a> <a href="#">History</a>	<a href="#">Delete</a>
2023	999.99	LA County Test	Data Transmittal - DA	Approved		<a href="#">View</a> <a href="#">History</a>	<a href="#">Delete</a>
2023	999.99	LA County Test	Data Engineer/Misc 1 R v1	Denied	Missing Bill Description	<a href="#">View</a> <a href="#">History</a>	<a href="#">Delete</a>
2023	999.99	LA County Test	Data Transmittal - DA COR v2	Pending for Review		<a href="#">View</a> <a href="#">History</a>	<a href="#">Delete</a>
2023	999.99	LA County Test	Engineer/Misc 1	Pending for Review		<a href="#">View</a> <a href="#">History</a>	<a href="#">Delete</a>

Records per page: 100 Records: 1 - 7 of 7 - Pages: 1

9G. Shown below is the **Document History** page. To go back to the Document Management page, click the **Back** button.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

## Document History

**Back**

Fiscal Year: 2023  
 Agency #: 999.99  
 Bill Description: LA County Test  
 Document: Data Transmittal DA COR v1 [View Document](#)

**Document History**

Version	History/Status	Comment	Updated By	Updated Date
1	Document has been denied	Missing Bill Description	User, Auditor	03/28/2023
<a href="#">1</a>	Document is pending for review		User, Test	03/28/2023

Records: 1 - 2 of 2

9H. To delete a document with a **'Denied'** or **'Pending Review'** status, click the **Delete** link.

**NOTE: The Delete function is disabled on approved documents.** Contact the Auditor staff if you need to delete an approved document. They must update the status to 'Denied' before you can delete your document.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

## Document Management

Open Search Panel Export to Excel Refresh

Records: 1 - 7 of 7 - Pages: 1

Drag a column header here to group by that column.

Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
2023	999.99	LA County Test	Billing Agreement	Approved		View History	Delete
2023	999.99	LA County Test	Resolution/Ordinance	Approved		View History	Delete
2023	999.99	LA County Test	Agency Information Sheet	Approved		View History	Delete
2023	999.99	LA County Test	Data Transmittal - DA	Approved		View History	Delete
2023	999.99	LA County Test	Data Transmittal - DA COR v1	Denied	Missing Bill Description	View History	<b>Delete</b>
2023	999.99	LA County Test	Data Transmittal - DA COR v2	Pending for Review		View History	Delete
2023	999.99	LA County Test	Engineer/Misc 1	Pending for Review		View History	Delete

Records per page: 100 Records: 1 - 7 of 7 - Pages: 1



9I. A pop-up message will appear to confirm the delete. Click **OK** or **Cancel**.

The screenshot shows the 'Document Management' interface with a confirmation dialog box overlaid on a table. The dialog box asks: 'Are you sure you want to delete the following document? Agency #: 999.99 Document: Data Transmittal DA COR v1'. The table below has columns: Fiscal Year, Agency #, Bill Description, Document, Status, Comment, Report, and Action. The row for 'Data Transmittal - DA COR v1' is highlighted in red.

Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
2023	999.99	LA County Test	Billing Ag			View History	Delete
2023	999.99	LA County Test	Resolutio			View History	Delete
2023	999.99	LA County Test	Agency I			View History	Delete
2023	999.99	LA County Test	Data Tra			View History	Delete
2023	999.99	LA County Test	Data Transmittal - DA COR v1	Denied	Missing Bill Description	View History	Delete
2023	999.99	LA County Test	Data Transmittal - DA COR v2	Pending for Review		View History	Delete
2023	999.99	LA County Test	Engineer/Misc 1	Pending for Review		View History	Delete

9J. The Data Transmittal for agency number 999.99 has been deleted from the list. **Upload a corrected document.**

The screenshot shows the 'Document Management' interface with a table of documents. The row for 'Data Transmittal - DA COR v1' is highlighted in red. The table has columns: Fiscal Year, Agency #, Bill Description, Document, Status, Comment, Report, and Action.

Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
2023	999.99	LA County Test	Agency Information Sheet	Approved		View History	Update Delete
2023	999.99	LA County Test	Billing Agreement	Approved		View History	Update Delete
2023	999.99	LA County Test	Data Transmittal - DA	Approved		View History	Update Delete
2023	999.99	LA County Test	Data Transmittal - DA COR v1	Approved		View History	Update Delete
2023	999.99	LA County Test	Data Transmittal - DA COR v2	Pending for Review		View History	Update Delete
2023	999.99	LA County Test	Engineer/Misc 1	Pending for Review		View History	Update Delete
2023	999.99	LA County Test	Resolution/Ordinance	Approved		View History	Update Delete

9K. Click, drag and drop each column header to the area indicated in the example below to group by that column. The example below places a line break between each agency number and makes the page easier to look at. **Click, drag and drop the header back down before proceeding to the next step.**

**NOTE:** The **Comment**, **Report** and **Action** headers cannot be dragged to the top.

The screenshot shows the DAWeb Auditor Controller interface. At the top, there is a navigation bar with the DAWeb logo, the title "Auditor Controller", and version "v2.2.3.2". Below the navigation bar are tabs for "Inbox", "Exempt Parcels", "Upload File", "Document Management", "Upload Document", and "Create AIS Form". The main content area is titled "Document Management" and includes buttons for "Open Search Panel", "Export to Excel", and "Refresh". A table displays document records, grouped by agency number. The table has columns for Fiscal Year, Agency #, Bill Description, Document, Status, Comment, Report, and Action. A red box highlights the "Agency #" header in the table, and an arrow points to it from the "Agency #" column header in the table's header row.

Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
<b>Agency #: 666.66</b>							
2018	666.66	LA County test account	Billing Agreement	Approved		<a href="#">View History</a>	<a href="#">Delete</a>
2018	666.66	LA County test account	Resolution/Ordinance	Approved		<a href="#">View History</a>	<a href="#">Delete</a>
<b>Agency #: 888.88</b>							
2018	888.88	LA County test account	Billing Agreement	Denied	Missing Account Number	<a href="#">View History</a>	<a href="#">Delete</a>
2018	888.88	LA County test account	Resolution/Ordinance	Approved		<a href="#">View History</a>	<a href="#">Delete</a>
2018	888.88	LA County test account	Agency Information Sheet	Pending for Review		<a href="#">View History</a>	<a href="#">Delete</a>
2018	888.88	LA County test account	Engineer/Misc 1	Pending for Review		<a href="#">View History</a>	<a href="#">Delete</a>
<b>Agency #: 999.98</b>							
2018	999.98	LA County test account	Billing Agreement	Denied	Missing Required Signatures	<a href="#">View History</a>	<a href="#">Delete</a>
2018	999.98	LA County test account	Resolution/Ordinance	Pending for Review		<a href="#">View History</a>	<a href="#">Delete</a>
<b>Agency #: 999.99</b>							
2018	999.99	LA County test account	Resolution/Ordinance	Approved		<a href="#">View History</a>	<a href="#">Delete</a>
2018	999.99	LA County test account	Agency Information Sheet	Approved		<a href="#">View History</a>	<a href="#">Delete</a>
2018	999.99	LA County test account	Data Transmittal - DA	Approved		<a href="#">View History</a>	<a href="#">Delete</a>
2018	999.99	LA County test account	Engineer/Misc 1	Approved		<a href="#">View History</a>	<a href="#">Delete</a>
2018	999.99	LA County test account	Data Transmittal - PU	Approved		<a href="#">View History</a>	<a href="#">Delete</a>
2018	999.99	LA County test account	Data Transmittal - DA COR v1	Approved		<a href="#">View History</a>	<a href="#">Delete</a>



- 9L. Multiple grouping can be done. For example, click, drag and drop the Document header followed by the Status header to sort by document and status.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form

## Document Management

Open Search Panel Export to Excel Refresh

Records: 1 - 15 of 15 - Pages: 1

**Document** **Status**

Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
<b>Document: Agency Information Sheet</b>							
<b>Status: Approved</b>							
2018	999.99	LA County test account	Agency Information Sheet	Approved		<a href="#">View History</a>	<a href="#">Delete</a>
<b>Status: Pending for Review</b>							
2018	888.88	LA County test account	Agency Information Sheet	Pending for Review		<a href="#">View History</a>	<a href="#">Delete</a>
<b>Document: Billing Agreement</b>							
<b>Status: Approved</b>							
2018	666.66	LA County test account	Billing Agreement	Approved		<a href="#">View History</a>	<a href="#">Delete</a>
2018	999.99	LA County test account	Billing Agreement	Approved		<a href="#">View History</a>	<a href="#">Delete</a>
<b>Status: Denied</b>							
2018	888.88	LA County test account	Billing Agreement	Denied	Missing Account Number	<a href="#">View History</a>	<a href="#">Delete</a>
2018	999.98	LA County test account	Billing Agreement	Denied	Missing Required Signatures	<a href="#">View History</a>	<a href="#">Delete</a>
<b>Document: Data Transmittal - COR v1</b>							
<b>Status: Approved</b>							
2018	999.99	LA County test account	Data Transmittal - DA COR v1	Approved		<a href="#">View History</a>	<a href="#">Delete</a>
<b>Document: Data Transmittal - DA</b>							
<b>Status: Approved</b>							
2018	999.99	LA County test account	Data Transmittal - DA	Approved		<a href="#">View History</a>	<a href="#">Delete</a>
<b>Document: Data Transmittal - PU</b>							
<b>Status: Approved</b>							
2018	999.99	LA County test account	Data Transmittal - PU	Approved		<a href="#">View History</a>	<a href="#">Delete</a>
<b>Document: Engineer/Misc</b>							
<b>Status: Approved</b>							

- 9M. Click the **Comment** header twice to sort all denied documents to the top of the list. This is a useful way to group all documents that you need to delete and re-upload.

The screenshot shows the DAWeb Auditor Controller interface. At the top, there is a navigation bar with the County of Los Angeles logo, the text "DAWeb Auditor Controller", and version "v 2.2.3.2". On the right, there are links for "Options | Log Out | Help" and a user greeting "Welcome, Agency User". Below the navigation bar is a menu with items: "Inbox", "Exempt Parcels", "Upload File", "Document Management", "Upload Document", and "Create AIS Form".

The main section is titled "Document Management" and contains three buttons: "Open Search Panel", "Export to Excel", and "Refresh". Below these buttons is a pagination bar showing "Records: 1 - 15 of 15 - Pages: 1".

A table with the following columns is displayed: "Fiscal Year", "Agency #", "Bill Description", "Document", "Status", "Comment", "Report", and "Action". The "Comment" column header is highlighted with a red box. The table contains 15 rows of data, with the first two rows having "Denied" status and red text in the "Comment" column: "Missing Required Signatures" and "Missing Account Number".

At the bottom of the table, there is a "Records per page:" dropdown menu set to "100" and another pagination bar showing "Records: 1 - 15 of 15 - Pages: 1".

Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
2018	999.98	LA County test account	Billing Agreement	Denied	Missing Required Signatures	View History	Delete
2018	888.88	LA County test account	Billing Agreement	Denied	Missing Account Number	View History	Delete
2018	666.66	LA County test account	Billing Agreement	Approved		View History	Delete
2018	666.66	LA County test account	Resolution/Ordinance	Approved		View History	Delete
2018	888.88	LA County test account	Resolution/Ordinance	Approved		View History	Delete
2018	999.99	LA County test account	Resolution/Ordinance	Approved		View History	Delete
2018	999.99	LA County test account	Agency Information Sheet	Approved		View History	Delete
2018	999.99	LA County test account	Data Transmittal - DA	Approved		View History	Delete
2018	999.99	LA County test account	Engineer/Misc 1	Approved		View History	Delete
2018	999.99	LA County test account	Data Transmittal - PU	Approved		View History	Delete
2018	999.99	LA County test account	Data Transmittal - DA COR v1	Approved		View History	Delete
2018	999.99	LA County test account	Billing Agreement	Approved		View History	Delete
2018	888.88	LA County test account	Agency Information Sheet	Pending for Review		View History	Delete
2018	888.88	LA County test account	Engineer/Misc 1	Pending for Review		View History	Delete
2018	999.98	LA County test account	Resolution/Ordinance	Pending for Review		View History	Delete

- 9N. The **Open Search Panel** can be used to search for a specific **Agency Number** or it can be used in conjunction with an asterisk (\*). For example, click the **Open Search Panel** button and enter 999.9\* in the Agency Number box.

The screenshot shows the 'Document Management' interface with a search panel overlay. The search panel is titled 'Search Panel' and contains the following fields:

- Fiscal Year: 2018
- Agency Number: 999.9\*
- Document Type: All
- Status: All

Buttons for 'Search', 'Reset', and 'Close Search Panel' are located at the bottom of the search panel. The background table shows a list of records with columns for Fiscal Year, Agency #, Bill Description, Document, Status, Comment, Report, and Action.

- 9O. Shown below is the search result for Agency Numbers 999.98 and 999.99.

The screenshot shows the search results for Agency Numbers 999.98 and 999.99. The 'Agency #' column is highlighted with a red box, and the corresponding rows are also highlighted. The table contains the following data:

Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
2018	999.98	LA County test account	Billing Agreement	Denied	Missing Required Signatures	View History	Delete
2018	999.98	LA County test account	Resolution/Ordinance	Pending for Review		View History	Delete
2018	999.99	LA County test account	Resolution/Ordinance	Approved		View History	Delete
2018	999.99	LA County test account	Agency Information Sheet	Approved		View History	Delete
2018	999.99	LA County test account	Data Transmittal - DA	Approved		View History	Delete
2018	999.99	LA County test account	Engineer/Misc 1	Approved		View History	Delete
2018	999.99	LA County test account	Data Transmittal - PU	Approved		View History	Delete
2018	999.99	LA County test account	Data Transmittal - DA COR v1	Approved		View History	Delete
2018	999.99	LA County test account	Billing Agreement	Approved		View History	Delete

9P. To go back to the full list, click the **Reset** button.

The screenshot shows the 'Document Management' interface. At the top, there are navigation tabs: 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. Below the tabs is the 'Document Management' title. There are three buttons: 'Open Search Panel', 'Export to Excel', and 'Refresh'. A 'Search Panel' is open, showing filters for 'Fiscal Year' (2018), 'Agency Number' (999.9\*), 'Document Type' (All), and 'Status' (All). The 'Reset' button is highlighted with a red box. Below the search panel is a table with columns: 't', 'Status', 'Comment', 'Report', and 'Action'. The table contains four rows of data, all with a status of 'Pending for Review'. The bottom row is highlighted.

t	Status	Comment	Report	Action
n/Ordinance	Pending for Review		View History	Delete
reement	Pending for Review		View History	Delete
nformation Sheet	Pending for Review		View History	Delete
2018 999.99 Test Agency Data Transmittal - DA	Pending for Review		View History	Delete

9Q. To search by document type, select the following on the **Document Type** drop down box: **Billing Agreement, Resolution/Ordinance, Agency Information Sheet, Data Transmittal or Engineer/Misc.**

The screenshot shows the 'Document Management' interface. At the top, there are navigation tabs: 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. Below the tabs is the 'Document Management' title. There are three buttons: 'Open Search Panel', 'Export to Excel', and 'Refresh'. A 'Search Panel' is open, showing filters for 'Fiscal Year' (2018), 'Agency Number' (999.9\*), and 'Document Type'. The 'Document Type' dropdown menu is open, showing options: 'All', 'Billing Agreement', 'Resolution/Ordinance', 'Agency Information Sheet', 'Data Transmittal', and 'Engineer/Misc'. The 'Document Type' label is highlighted with a red box. Below the search panel is a table with columns: 't', 'Status', 'Comment', 'Report', and 'Action'. The table contains four rows of data, all with a status of 'Pending for Review'. The bottom row is highlighted.

t	Status	Comment	Report	Action
n/Ordinance	Pending for Review		View History	Delete
reement	Pending for Review		View History	Delete
nformation Sheet	Pending for Review		View History	Delete
2018 999.99 Test Agency Data Transmittal - DA	Pending for Review		View History	Delete

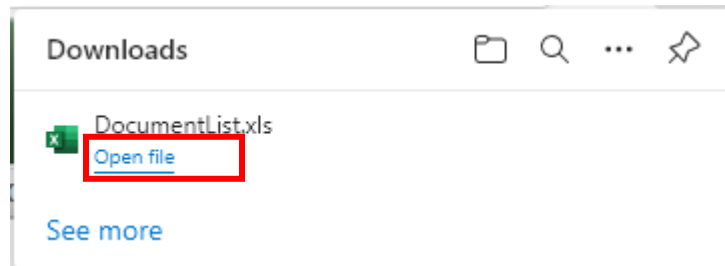
9R. To search by document status, select the following on the **Status** drop down box: **Pending for Approval, Approved or Denied**.

The screenshot shows the 'Document Management' interface. At the top, there are navigation tabs: 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. Below the tabs, there are three buttons: 'Open Search Panel', 'Export to Excel', and 'Refresh'. A 'Search Panel' is open, showing filters for 'Fiscal Year' (2018), 'Agency Number' (999.9\*), and 'Document Type' (All). The 'Status' dropdown menu is open, with options: 'All', 'Pending for Approval', 'Approved', and 'Denied'. The 'Status' dropdown is highlighted with a red box. Below the search panel, there is a table of documents. The table has columns: 'Fiscal Year', 'Agency #', 'Bill Description', 'Document', 'Status', 'Comment', 'Report', and 'Action'. The table contains six rows of data, all with a status of 'Pending for Review'. At the bottom, there is a 'Records per page' dropdown set to 100 and a pagination control showing 'Records: 1 - 6 of 6 - Pages: 1'.

9S. To convert the document list to Excel, click the **Export to Excel** button.

The screenshot shows the 'Document Management' interface. At the top, there are navigation tabs: 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. Below the tabs, there are three buttons: 'Open Search Panel', 'Export to Excel', and 'Refresh'. The 'Export to Excel' button is highlighted with a red box. Below the buttons, there is a table of documents. The table has columns: 'Fiscal Year', 'Agency #', 'Bill Description', 'Document', 'Status', 'Comment', 'Report', and 'Action'. The table contains six rows of data, all with a status of 'Pending for Review'. At the bottom, there is a 'Records per page' dropdown set to 100 and a pagination control showing 'Records: 1 - 6 of 6 - Pages: 1'.

9T. The file will automatically download. Click the **Open file** button in the web browser Downloads folder to view the file.



9U. Shown below is the document list in **Excel**.

**NOTE:** Under the 'Agency #' column, leading and/or ending zeros will be dropped.

A screenshot of an Excel spreadsheet titled 'DocumentList.xls'. The ribbon shows 'Home' selected. The spreadsheet contains a table with the following data:

	A	B	C	D	E	F	G
1	Fiscal Year	Agency #	Bill Description	Document	Status	Comment	
2	2018	999.99	Test Agency	Resolution/Ordinance	Pending for Review		
3	2018	999.99	Test Agency	Billing Agreement	Pending for Review		
4	2018	999.99	Test Agency	Agency Information Sheet	Pending for Review		
5	2018	999.99	Test Agency	Data Transmittal - DA	Pending for Review		
6	2018	999.99	Test Agency	Data Transmittal - PU	Pending for Review		
7	2018	999.99	Test Agency	Data Transmittal - DA COR v1	Pending for Review		
8							
9							

- 9V. Click the **Refresh** button periodically to update the **Status** and **Comment** columns. The Status and Comment columns will not update if you are in the Document Management page while the Auditor is updating the status of your documents and comments.

The screenshot displays the DAWeb Auditor Controller interface. At the top, there is a navigation bar with the County of Los Angeles logo, the text "DAWeb Auditor Controller v2.2.3.3", and user information "Options | Log Out | Help" and "Welcome, Agency User". Below the navigation bar are several menu items: "Inbox", "Exempt Parcels", "Upload File", "Document Management", "Upload Document", and "Create AIS Form".

The main section is titled "Document Management". Below the title, there are three buttons: "Open Search Panel", "Export to Excel", and "Refresh". The "Refresh" button is highlighted with a red border. Below the buttons, there is a pagination control showing "Records: 1 - 15 of 15 - Pages: 1".

The main content is a table with the following columns: Fiscal Year, Agency #, Bill Description, Document, Status, Comment, Report, and Action. The table contains 15 rows of data. The "Refresh" button is used to update the "Status" and "Comment" columns.

Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
2018	666.66	LA County test account	Billing Agreement	Approved		View History	Delete
2018	666.66	LA County test account	Resolution/Ordinance	Approved		View History	Delete
2018	888.88	LA County test account	Billing Agreement	Denied	Missing Account Number	View History	Delete
2018	888.88	LA County test account	Resolution/Ordinance	Approved		View History	Delete
2018	888.88	LA County test account	Agency Information Sheet	Pending for Review		View History	Delete
2018	888.88	LA County test account	Engineer/Misc 1	Pending for Review		View History	Delete
2018	999.98	LA County test account	Billing Agreement	Denied	Missing Required Signatures	View History	Delete
2018	999.98	LA County test account	Resolution/Ordinance	Pending for Review		View History	Delete
2018	999.99	LA County test account	Resolution/Ordinance	Approved		View History	Delete
2018	999.99	LA County test account	Agency Information Sheet	Approved		View History	Delete
2018	999.99	LA County test account	Data Transmittal - DA	Approved		View History	Delete
2018	999.99	LA County test account	Engineer/Misc 1	Approved		View History	Delete
2018	999.99	LA County test account	Data Transmittal - PU	Approved		View History	Delete
2018	999.99	LA County test account	Data Transmittal - DA COR v1	Approved		View History	Delete
2018	999.99	LA County test account	Billing Agreement	Approved		View History	Delete

At the bottom of the table, there is a "Records per page:" dropdown menu set to "100" and another pagination control showing "Records: 1 - 15 of 15 - Pages: 1".

# UPLOAD EXEMPT PARCELS FILE

## State Parcel Tax Reporting – Assembly Bill 2109

The Auditor-Controller will be reporting on behalf of all County direct assessment agencies that are levying parcel taxes. Only these agencies will be granted access to upload their Exempt Parcels file during the Direct Assessment season (**July 1 to mid-September**) to DAWeb.

Perform the following steps to upload the Exempt Parcels file:

**10A.** To upload an Exempt Parcels file, click the **Upload File** tab.

The screenshot shows the DAWeb interface. The navigation menu at the top includes 'Inbox', 'Exempt Parcels', 'Upload File' (highlighted with a red box), 'Document Management', 'Upload Document', and 'Create AIS Form'. Below the navigation menu is the 'Exempt Parcels' section. It features an 'Open Search Panel' button and a 'Refresh' button. A table with the following columns is visible: 'Fiscal Year', 'Agency #', 'TXN Count', 'Total DA AMT', 'Valid', 'Uploaded Date', 'Report', and 'Action'. The table is currently empty, with a message 'There are no records available.' displayed below it. The 'Records per page' is set to 100. The page number is 1 of 1.

**10B.** Perform the following upload steps:

1. Select **Exempt Parcels File**.
2. **Enter Agency number** to upload. Agency number must be 5 digits and in 2 decimal format.
3. Click the **Validate** button and steps 4 and 5 will appear.

The screenshot shows the 'Upload File' form. It has the following steps:

- 1. Select File Type:**
  - Direct Assessment File
  - Public Utility File
  - Correction Direct Assessment File
  - Correction Public Utility File
  - Exempt Parcels File (highlighted with a red box)
- 2. Enter agency number to upload:**
  - Input field: 999.99 (highlighted with a red box)
  - Requirement: Must be 5 digits and in 2 decimal format (xxx.xx)
- 3. Validate agency number:**
  - Button: Validate (highlighted with a red box)



10C. Click the **Browse** button in step 4, select a file to upload and click the **open** button or double-click on a file to upload.

The image shows a Windows File Explorer window on the left, displaying a folder named '2016'. Inside the folder, there is a file named 'EXEMPT\_2016\_99999.xlsx' with a date modified of '3/18/2016 11:45 AM' and a type of 'Microsoft'. The 'Open' button at the bottom right of the File Explorer is highlighted with a red box. On the right, a web browser window is open to a page titled 'Upload Document'. The page has a header 'v 2.2.7.2 Welcome, Test Agency' and a 'Browse' button highlighted with a red box. Below the browser window, the web application interface is shown with a '3. Validate agency number:' section containing a 'Validate' button, and a '4. Select File to upload:' section with a text box containing '[ no files selected ]' and a 'Browse' button highlighted with a red box.

10D. Move the cursor over the white file area to display the file name. If the file name is correct, then click the **Upload** button in step 5.

The image shows the 'Upload File' web application interface. It has a title 'Upload File' and five steps: 1. Select File Type: with radio buttons for 'Direct Assessment File', 'Public Utility File', 'Correction Direct Assessment File', 'Correction Public Utility File', and 'Exempt Parcels File' (selected). 2. Enter agency number to upload: with a text box containing '999.99' and a note 'Must be 5 digits and in 2 decimal format (xxx.xx)'. 3. Validate agency number: with a 'Validate' button. 4. Select File to upload: with a text box containing 'EXEMPT\_2016\_99999.xlsx' and a 'Browse' button. A red box highlights the text box, and a red arrow points to it from a callout box that says 'Move the cursor over the white area to display the file name'. Below the text box, the file size '114.21kB' is displayed. 5. Press upload: with a note '(Note: Press on Reset to choose a new file type and agency number)' and 'Upload' and 'Reset' buttons. The 'Upload' button is highlighted with a red box.

**10E.** A message will pop up under the Upload button after the file loaded successfully. To load additional file(s), repeat steps 10B to 10D.

## Upload File

**1. Select File Type:**

Direct Assessment File

Public Utility File

Correction Direct Assessment File

Correction Public Utility File

Exempt Parcels File

**2. Enter agency number to upload:**

Must be 5 digits and in 2 decimal format (xxx.xx)

**3. Validate agency number:**

Successfully uploaded files:  
EXEMPT\_2016\_99999.xlsx

**10F.** To view the uploaded file, click the Exempt Parcels tab.

Inbox **Exempt Parcels** Upload File Document Management Upload Document Create AIS Form

## Upload File

**1. Select File Type:**

Direct Assessment File

Public Utility File

Correction Direct Assessment File

Correction Public Utility File

Exempt Parcels File

**2. Enter agency number to upload:**

Must be 5 digits and in 2 decimal format (xxx.xx)

**3. Validate agency number:**

Successfully uploaded files:  
EXEMPT\_2016\_99999.xlsx

**10G.** Listed below are **descriptions of the Exempt Parcels columns**. If Valid = 'no' then proceed to **Correct the Data File in Edit Mode** section (P. 66). Proceed to the next step if Valid = 'yes'.

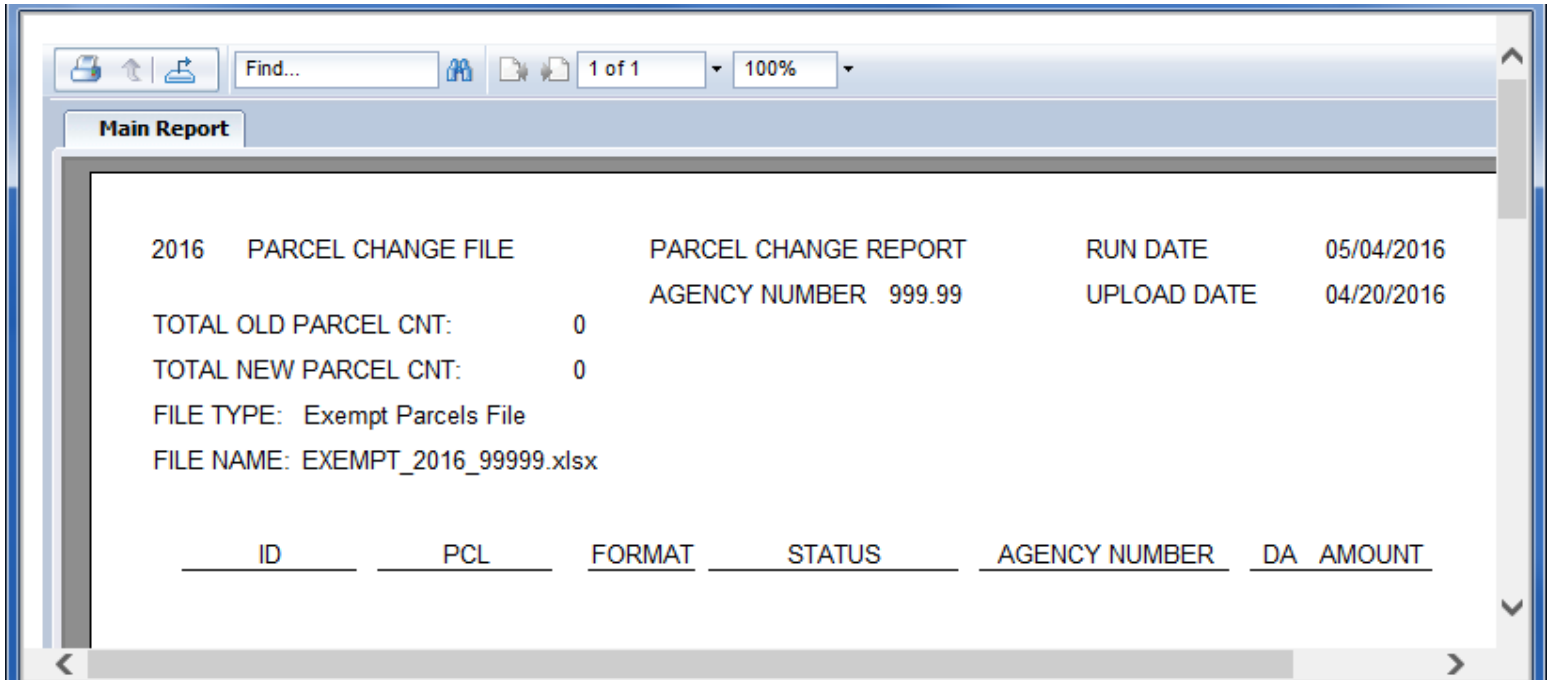
Fiscal Year	Agency #	TXN Count	Total DA AMT	Valid	Uploaded Date	Report	Action
2016	999.99	5,590	\$0.00	yes	04/20/2016	PCL CHG RPT Data Transmittal History/Detail Report	Edit Delete

1	<b>Fiscal Year</b>	Fiscal Year for which the Agency Number was processed.
2	<b>Agency #</b>	Direct Assessment Agency Number assigned to each agency by the Auditor-Controller.
3	<b>TXN Count</b>	Total transaction count on the input file
4	<b>Total DA AMT</b>	Total assessment amount on the input file
5	<b>Valid</b>	Indicates if the file submitted is valid (Valid = 'yes') or invalid (Valid = 'no'). Invalid files must be fixed before proceeding.
6	<b>Uploaded Date</b>	Indicates the date the file was uploaded to DAWeb
7	<b>Report</b>	<b>PCL CHG RPT:</b> Generates the Parcel Change Report by clicking on the link. <b>Data Transmittal:</b> Generates the Data Transmittal by clicking on the link. <b>History:</b> Shows the status of the agency number throughout the DA process. <b>Detail RPT:</b> Generates the Detail Report by clicking on the link. <b>Exception Report:</b> Links to Exceptions Webpage that shows Invalid Parcels that need to be corrected and resubmitted
8	<b>ACTION</b>	<b>Edit:</b> Click the 'Edit' link to correct errors in the Edit mode. <b>Delete:</b> Click the 'Delete' link to delete the file from the Inbox.

**10H.** For a **valid** file, click the **PCL CHG RPT** link under the Report column to retrieve the Parcel Change Report. The report can be exported to PDF or Excel.

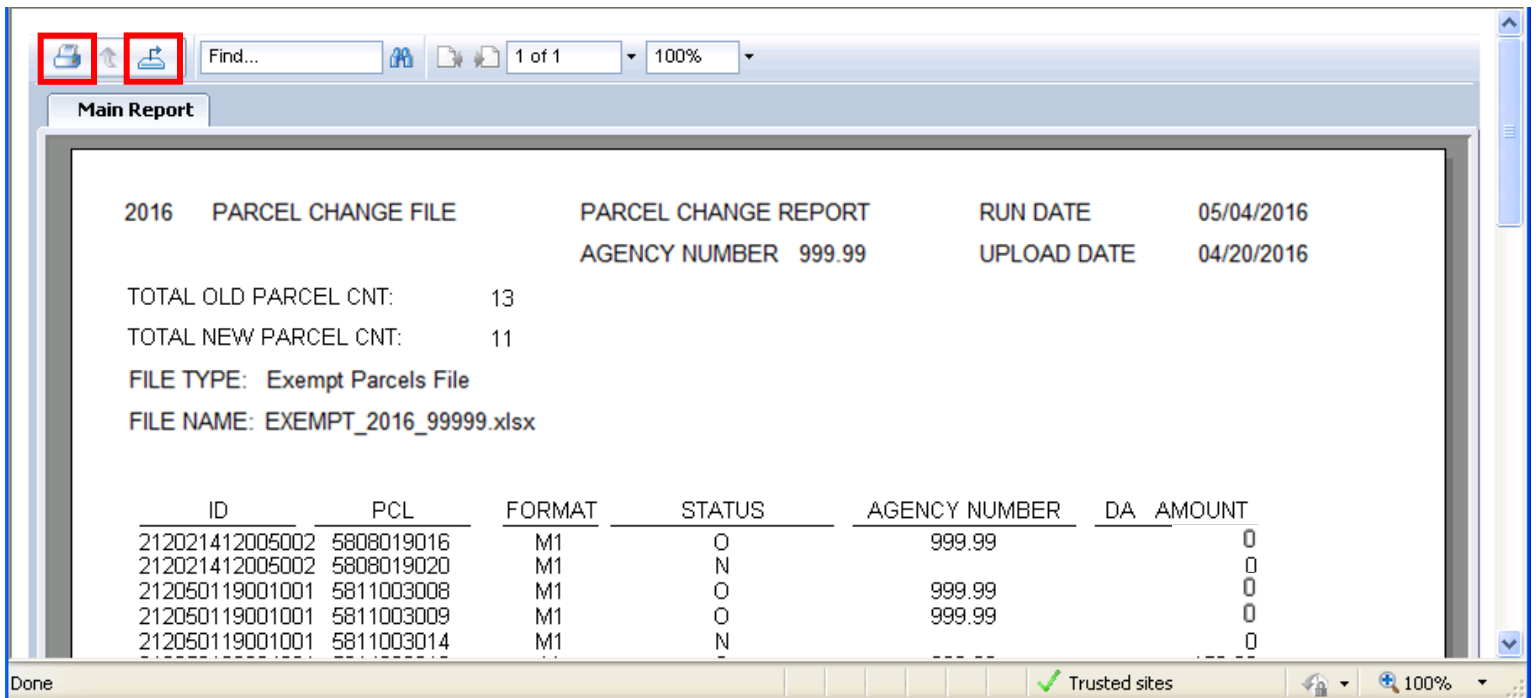
Fiscal Year	Agency #	TXN Count	Total DA AMT	Valid	Uploaded Date	Report	Action
2016	999.99	5,590	\$0.00	yes	04/20/2016	PCL CHG RPT Data Transmittal History/Detail Report	Edit Delete

101. A blank **Parcel Change Report** means that there are no parcel changes for the selected file.



**NOTE:** Print or Export the Parcel Change Report if it is **not blank** and proceed with the following options:

<ul style="list-style-type: none"> <li>Delete the current file from the Inbox and upload new file with parcel changes included in the file</li> </ul>	Go to <b>'Create the Excel Input Data File' (P. 33)</b> OR <b>'Create the Text Input Data File' (P. 42)</b>
<ul style="list-style-type: none"> <li>Add new parcels and delete old parcels in Edit mode</li> </ul>	Go to <b>'Correct the Data File in Edit Mode' (P. 66)</b>



10J. Click the **Data Transmittal** link under the **Report** column to verify the Total Exempt Parcel Count and Total Exempt Amount.

Fiscal Year	Agency #	TXN Count	Total DA AMT	Valid	Uploaded Date	Report	Action
2016	999.99	5,590	\$0.00	yes	04/20/2016	<a href="#">Data Transmittal</a> <a href="#">PCI CHG RPT</a> <a href="#">History/Detail Report</a>	<a href="#">Edit</a> <a href="#">Delete</a>

10K. The **Data Transmittal amounts must match** your expected totals. If they do not match then the input file should be reviewed to ensure all parcels are assessed properly. Re-up load a corrected file or make corrections to an existing file in **'Correct the Data File in Edit Mode'** section (P. 66).

- **Print** the Data Transmittal, **sign** and **date** it, **fill in all blanks**, **scan** it as a PDF.
- **Upload** the signed Data Transmittal to DAWeb under the **'Engineer's/Misc. Report [Supporting doc]'** document type. To upload documents, go to **'Upload Legal Documents'** section (P. 87).

DATE: May 24, 2016

TO: Department of Auditor-Controller  
Property Tax Services Division  
Direct Assessment Unit  
**ATTN: Evelyn Ramirez**

FILE TYPE:	Exempt Parcel
AGENCY ACCOUNT NUMBER:	999.99
BILL DESCRIPTION:	
TOTAL EXEMPT AMOUNT:	0.00
TOTAL EXEMPT PARCEL COUNT:	5,590

This is to certify that the Total Exempt Amount and Total Exempt Parcel Count for our Agency Account Number listed above are correct for the Fiscal Year 2016-2017.

Authorized By:	_____	_____
	Signature	Date Signed
Name and Title:	_____	
If there are any problems relating to the data provided, please call:		
Primary Contact:		
Name and Title:	_____	
Phone Number:	_____	
Email Address:	_____	
Secondary Contact (if applicable):		
Name and Title:	_____	
Phone Number:	_____	
Email Address:	_____	

- 10L. Exempt Parcels files do not need to be submitted to the Auditor. The Auditor can see your file as soon as it is successfully uploaded and will disable your file from editing and deleting once the file is valid (Valid = 'yes') and a signed Data Transmittal is uploaded. Please contact **Evelyn Ramirez at (213) 893-2344** immediately if you need to edit or delete the file.

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## Exempt Parcels

Open Search Panel Refresh

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Fiscal Year	Agency #	TXN Count	Total DA AMT	Valid	Uploaded Date	Report	Action
2016	999.99	5,590	\$0.00	yes	04/20/2016	PCL CHG RPT Data Transmittal History/Detail Report	Edit Delete

Records per page: 100

Records: 1 - 1 of 1 - Pages: 1