DAWeb Auditor Controller

Auditor-Controller
Direct Assessment Web Application
(DAWeb)

Agency Manual

June 11th, 2025

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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:

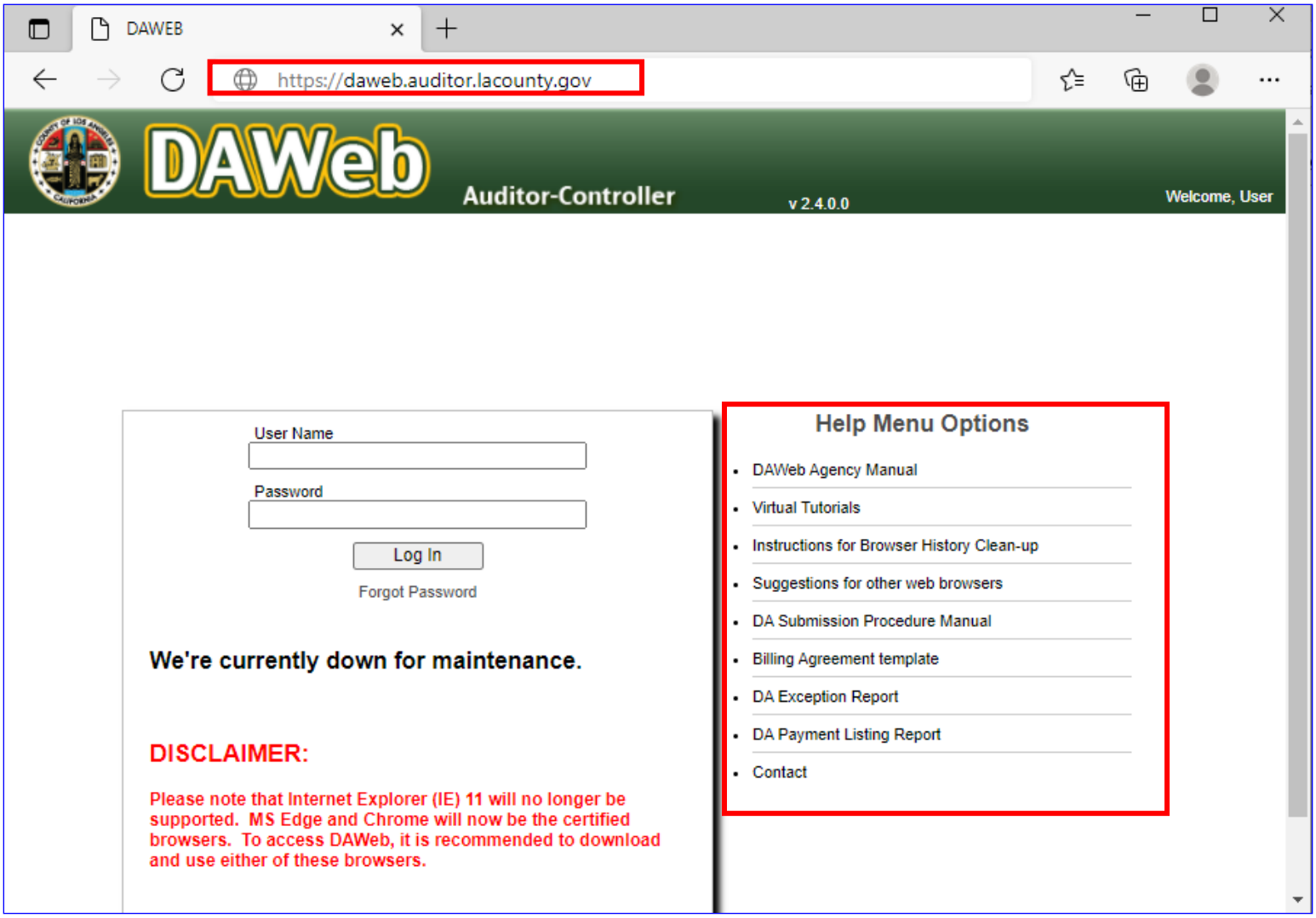
Aquilla Ivery-Simmons
500 West Temple St., Rm. 153
Los Angeles, CA 90012
(213)974-8573
DAInquiry@auditor.lacounty.gov

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.

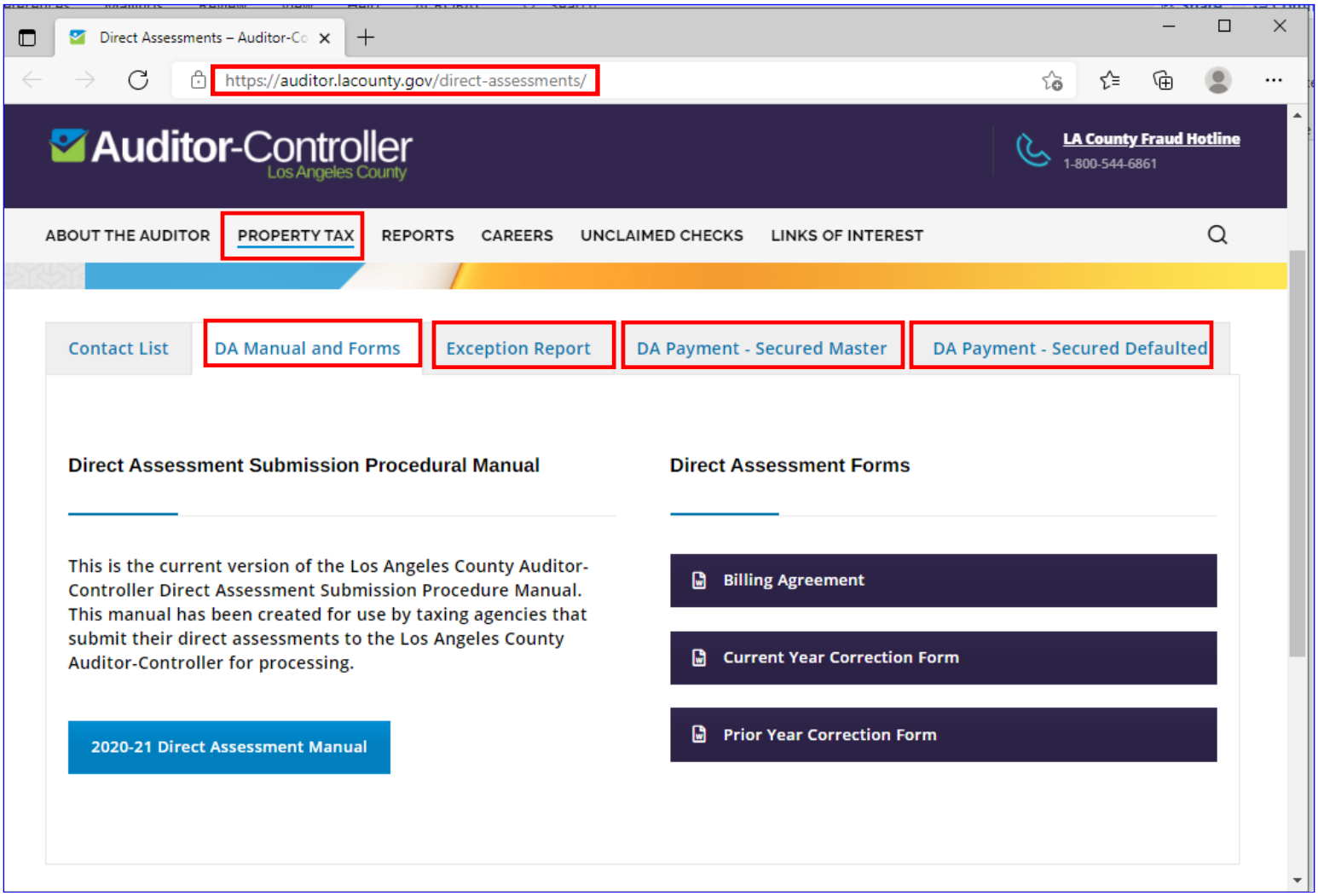


NOTE: Help Menu Options and Descriptions:

DAWeb Agency Manual	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.
Virtual Tutorials	Virtual training lessons for each section of the DAWeb process. From here, you can select and play each training lesson directly from your PC.
Instructions for Browser History Clean-up	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.
Suggestions for other web browsers	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.
DA Submission Procedure Manual	The annual submission manual that DA Unit provides to all agencies before DA roll build-up season starts. Important DA processing dates are included
Billing Agreement template	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.
DA Exception Report	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.
Direct Payment Listing Report	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.
Contact	Click the link to expand the contact information of the DA Unit Supervisor who oversees all direct assessments and DAWeb inquiries.

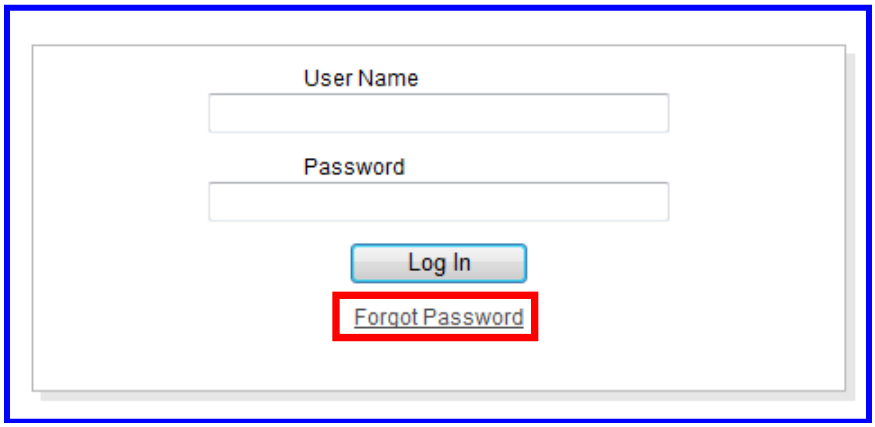
NOTE: The following tabs are located on the Department of Auditor-Controller's website: https://auditor.lacounty.gov/direct-assessments/

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

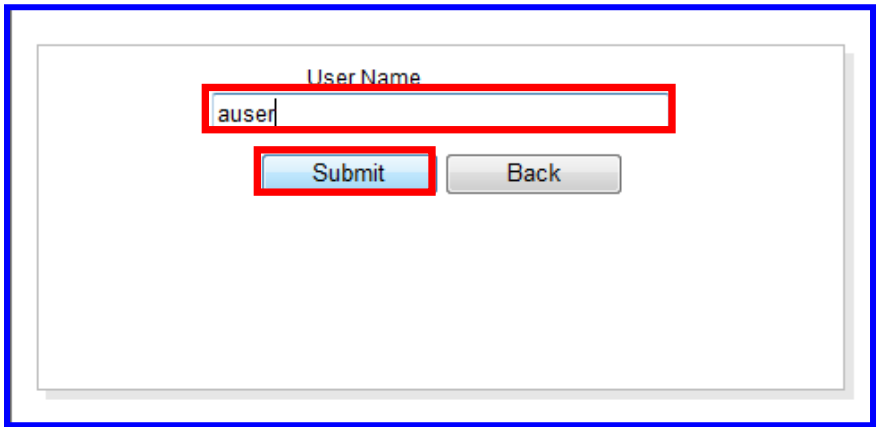


C. To log in, enter your **User Name** and **Password** and click the **Log In** button.

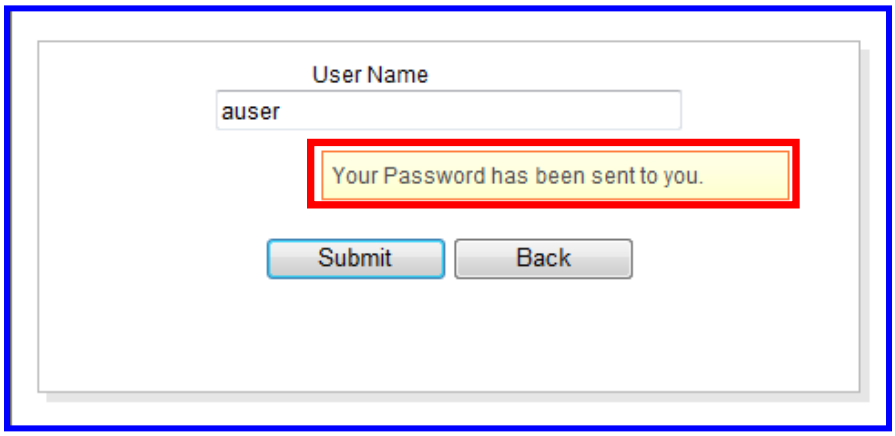
D. If you do not remember your password, click the Forgot Password link.



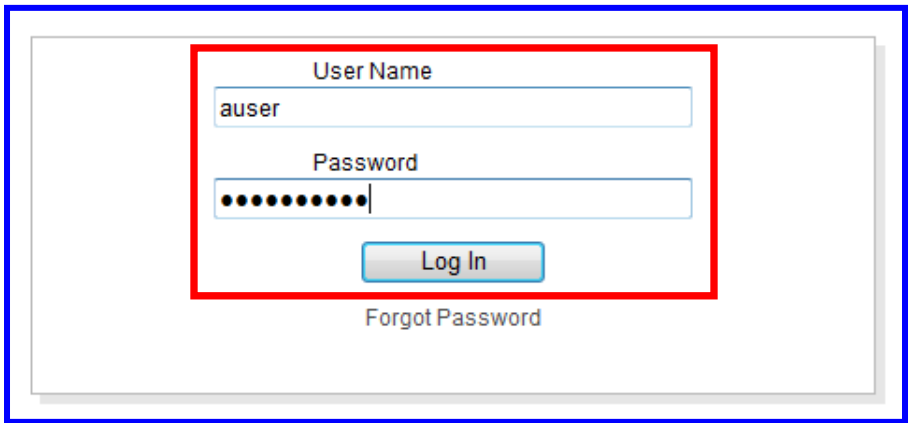
E. Enter your **User Name** and click the **Submit** button.



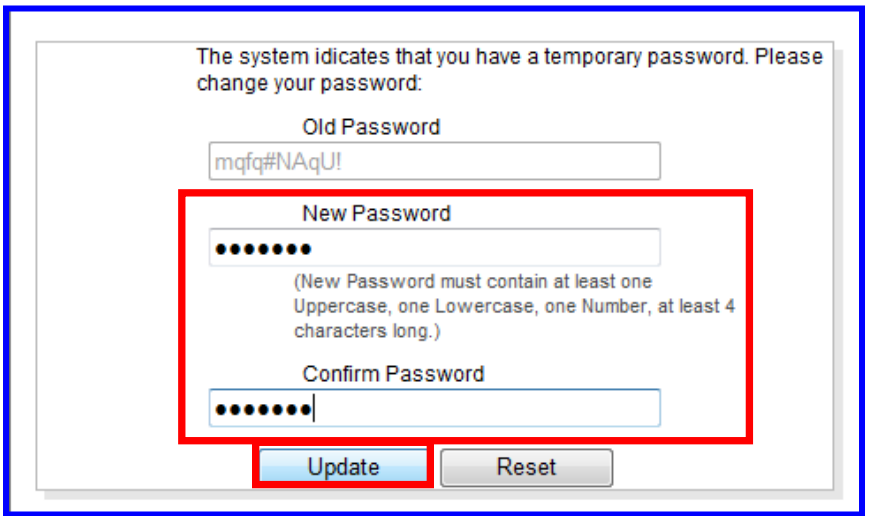
F. A temporary password will be sent via email. Check the Junk or Spam folder if it does not appear in your Inbox.



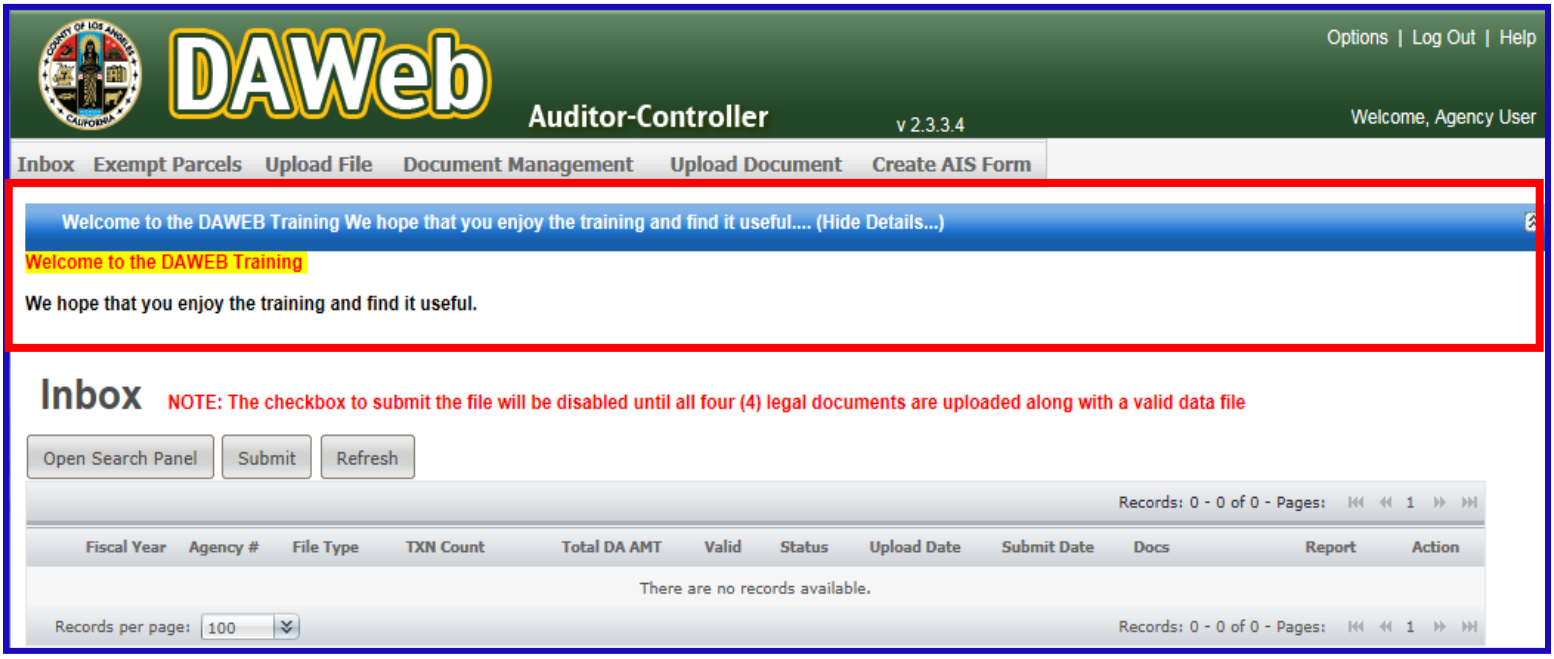
G. Enter your **User Name** and **Temporary Password** and click the **Log In** button.



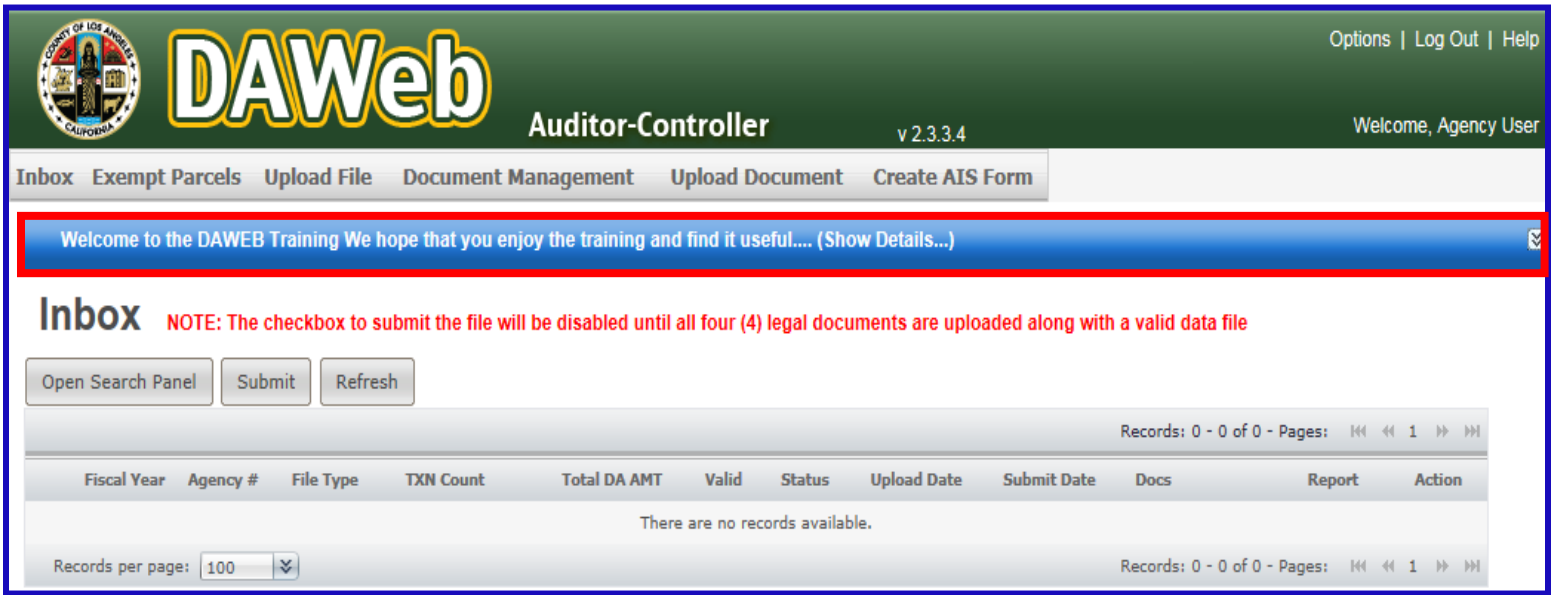
H. A new window will prompt you to change the temporary password. Enter your **new password**, confirm the password and click the **Update** button. DAWeb will take you directly to the Inbox.



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.

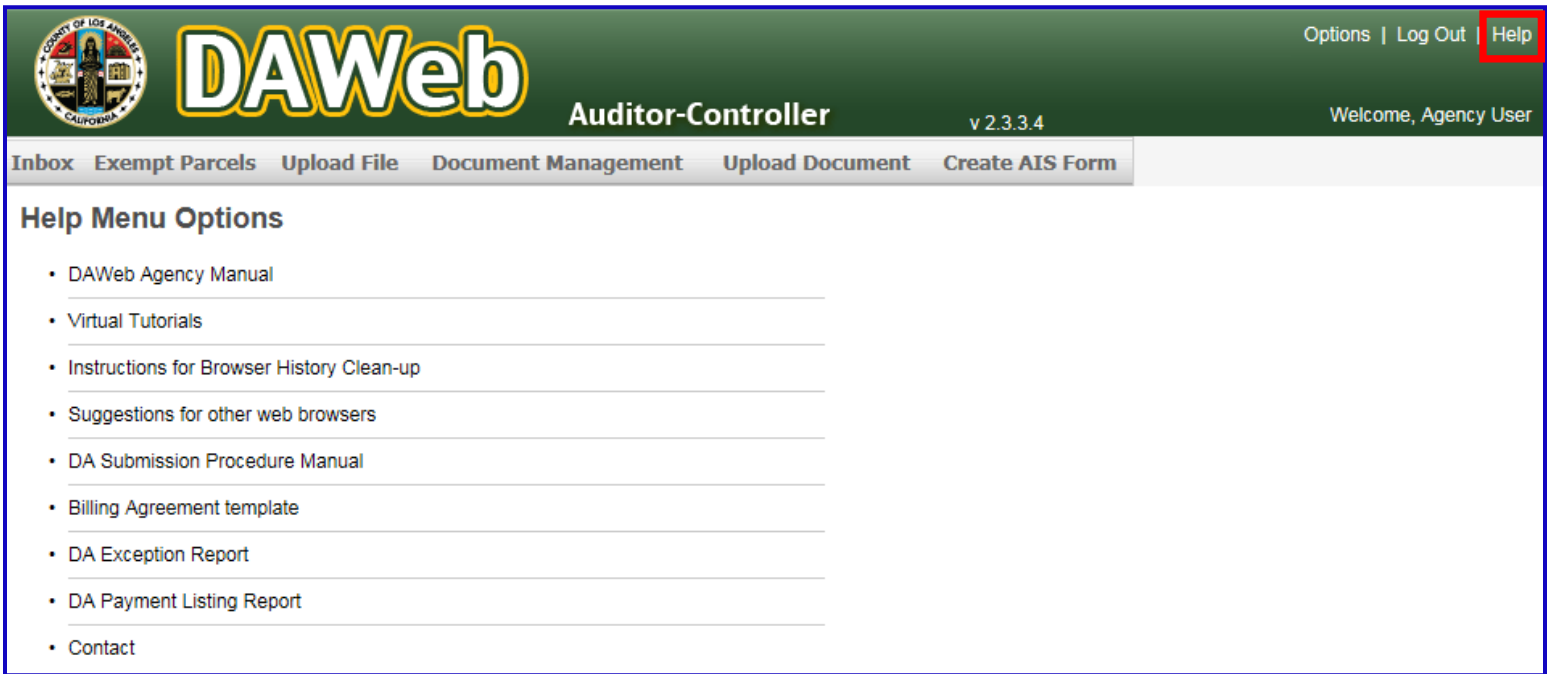


J. Click anywhere on the blue Inbox message bar to collapse the message box.

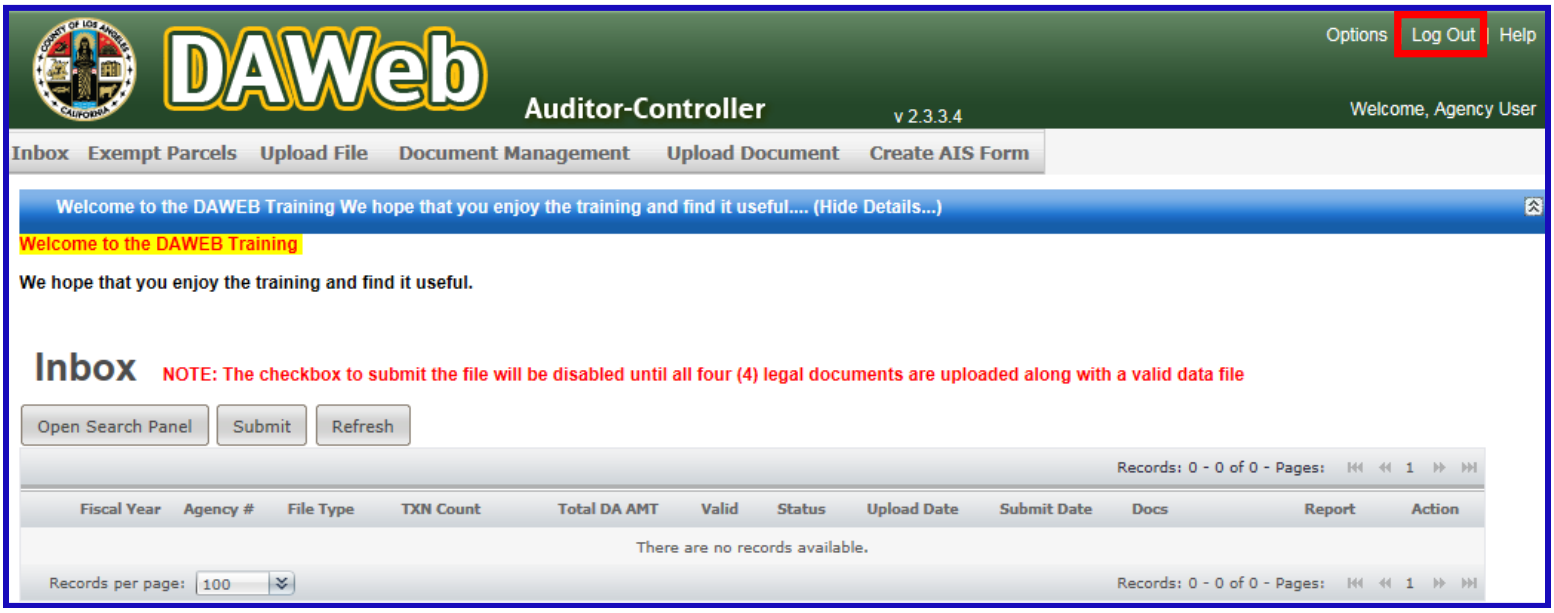


K. Click the **Options** link if you wish to change your password at any time.

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



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

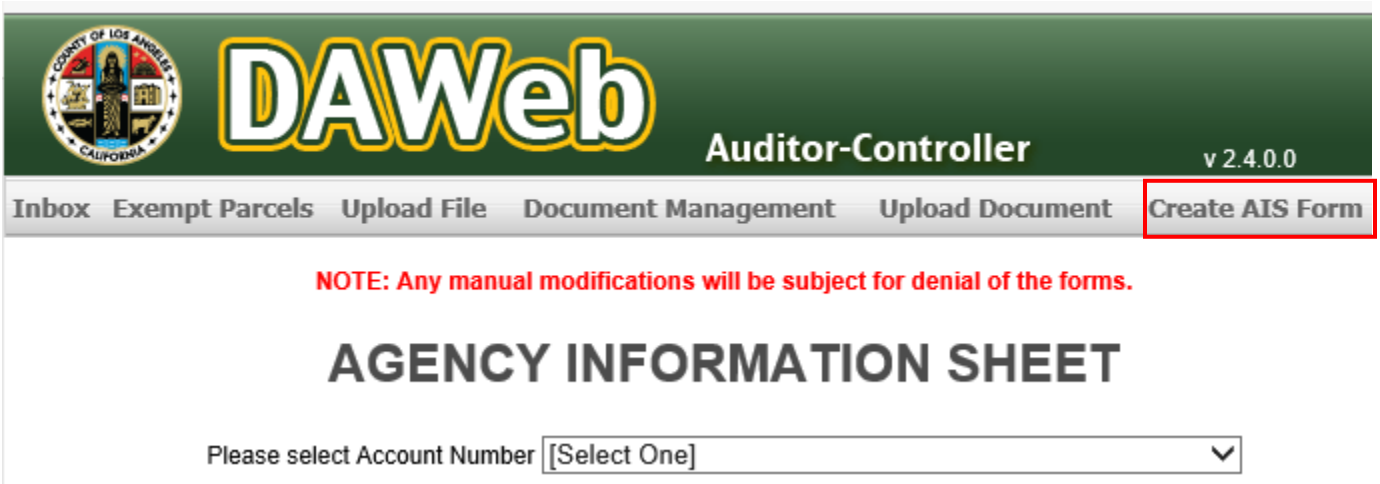


CREATE AGENCY INFORMATION SHEET FORM

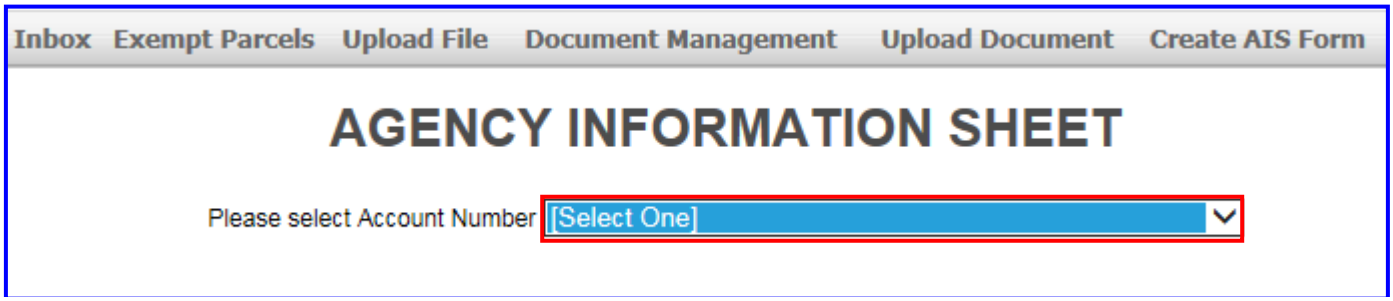
Agencies cannot proceed with submitting Direct Assessments or Public Utility files onto DAWEB without first creating and saving the Agency Information Sheet Form.

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.



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



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

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 10th**.

☐ 3. We have a written authority to levy assessments (i.e. resolution, ordinance, certified election results) until:
☐ Expiration Date MM/DD/YYYY ☐ 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:** [Select One] **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):

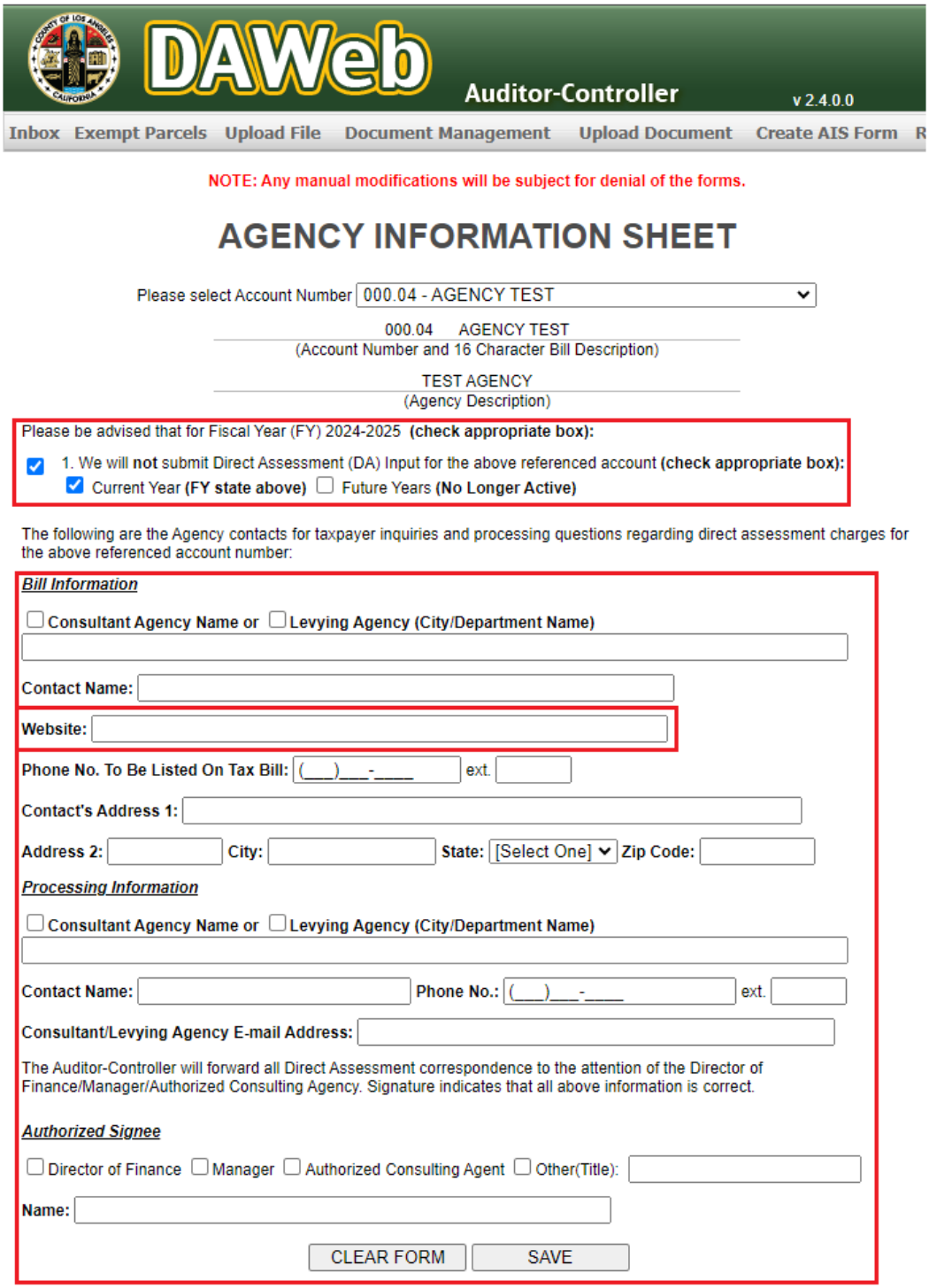
Name:

CLEAR FORM | SAVE

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.



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

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: 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

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

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: 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

CLEAR FORM | SAVE | PRINT

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.

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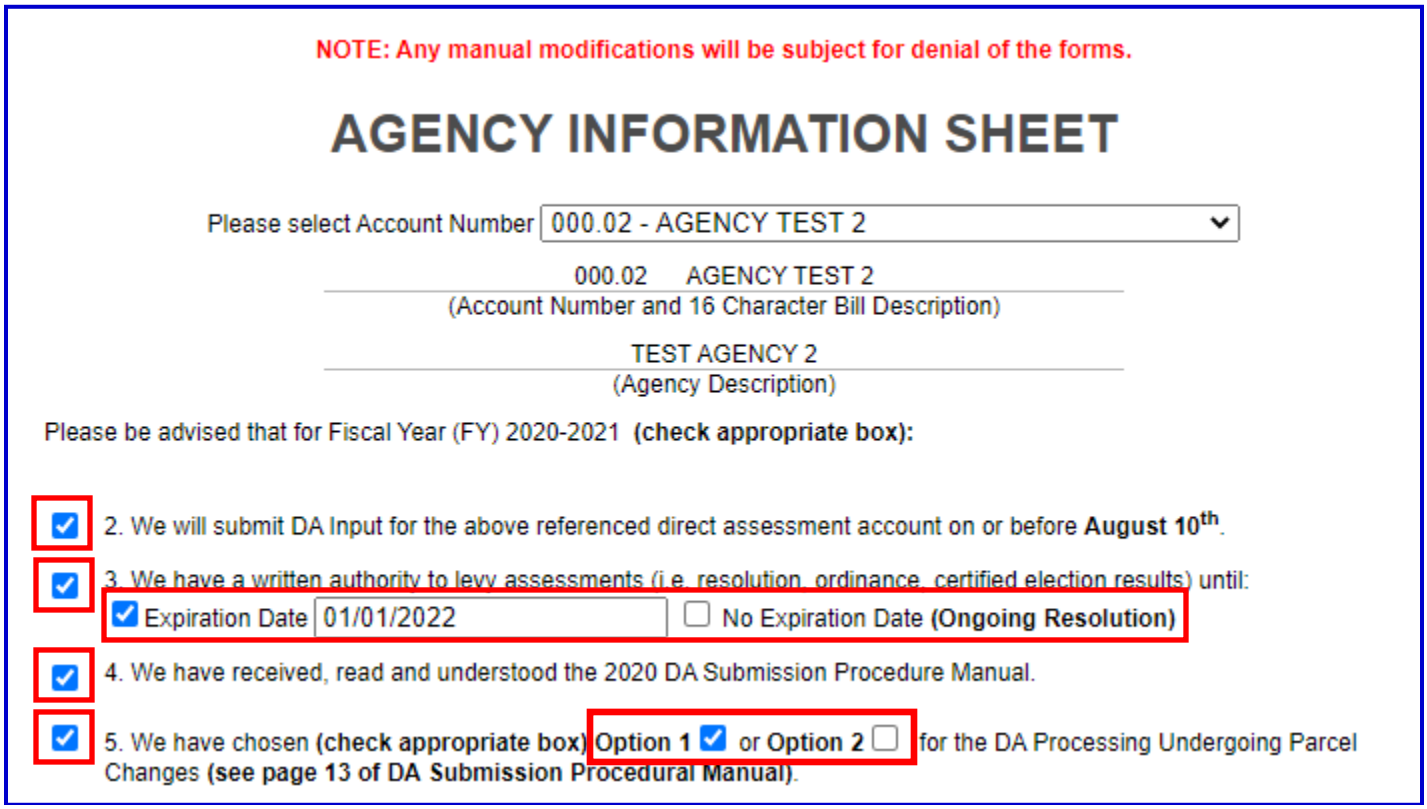


NOTE: Any manual modifications will be subject for denial of the forms.

AGENCY INFORMATION SHEET

Please select Account Number 000.02 - AGENCY TEST 2

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 10th**.

☑ 3. We have a written authority to levy assessments (i.e. resolution, ordinance, certified election results) until:
☑ Expiration Date 01/01/2022 ☐ No Expiration Date **(Ongoing Resolution)**

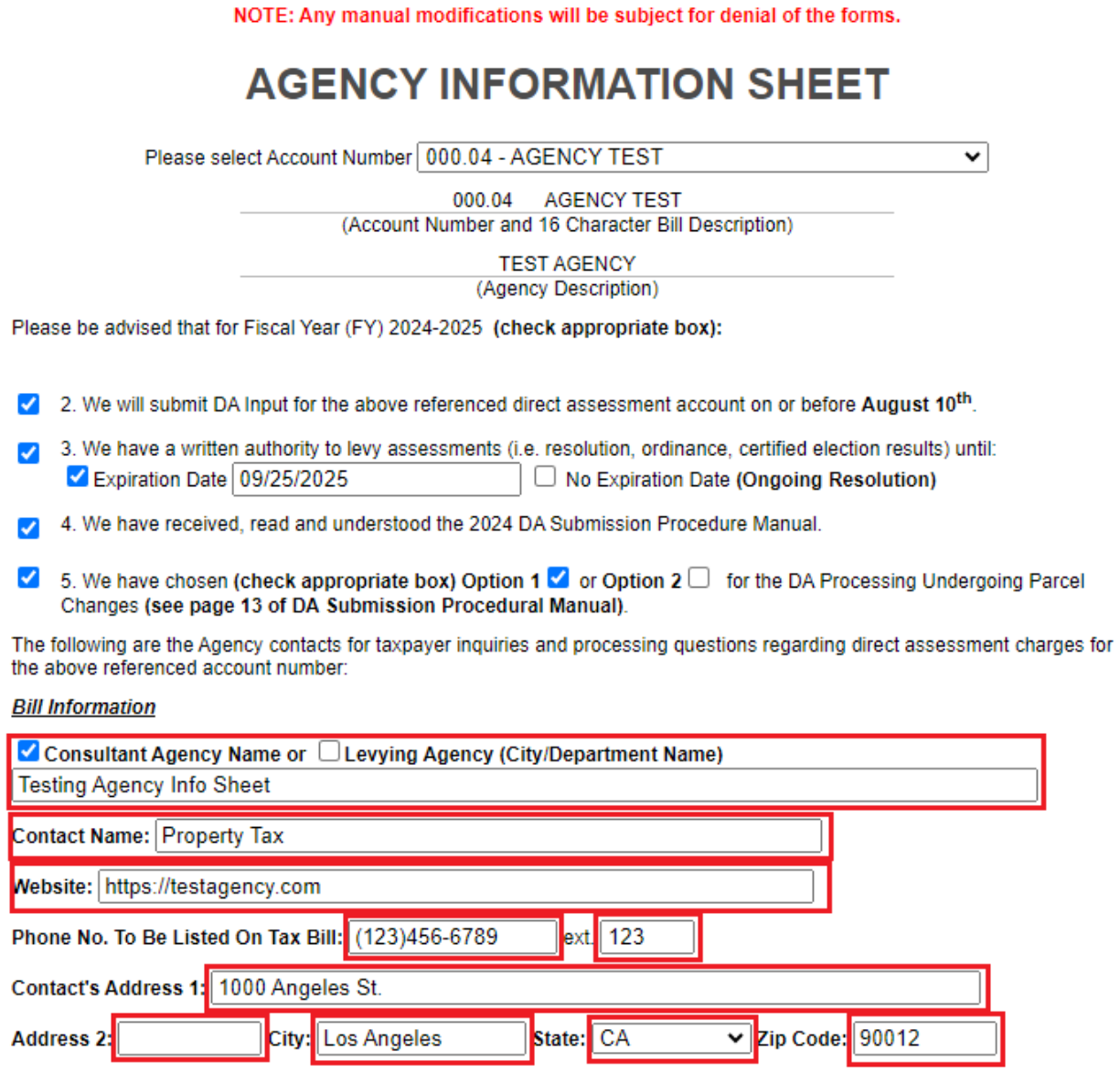
☑ 4. We have received, read and understood the 2020 DA Submission Procedure Manual.

☑ 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)**.

1I. 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

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 10th**.

☑ 3. We have a written authority to levy assessments (i.e. resolution, ordinance, certified election results) until:
☑ Expiration Date 09/25/2025 ☐ 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)**
Testing Agency Info Sheet

Contact Name: Property Tax

Website: https://testagency.com

Phone No. To Be Listed On Tax Bill: (123)456-6789 ext. 123

Contact's Address 1: 1000 Angeles St.

Address 2: **City:** Los Angeles **State:** CA **Zip Code:** 90012

.

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

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 10th**.

☑ 3. We have a written authority to levy assessments (i.e. resolution, ordinance, certified election results) until:
☑ Expiration Date 01/01/2022 ☐ 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: Contact First and Last Name

Website: www.testagency.com

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

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)**

Consultant Agency Name

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

Consultant/Levying Agency E-mail Address: Consultants123@consult.com

.

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

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)**
NBS

Contact Name: Caitlyn Nguyen

Website: https://lacounty.gov

Phone No. To Be Listed On Tax Bill: (123)456-7890 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)**
RT PNLTY

Contact Name: Caitlyn **Phone No.:** (123)456-6789 ext.

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: Caitlyn Nguyen

CLEAR FORM | SAVE | PRINT

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

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)**
NBS

Contact Name: Caitlyn Nguyen

Website: https://lacounty.gov

Phone No. To Be Listed On Tax Bill: (123)456-7890 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)**
RT PNLTY

Contact Name: Caitlyn **Phone No.:** (123)456-6789 ext.

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: Caitlyn Nguyen

CLEAR FORM | SAVE | PRINT

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1M. 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 doc 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 09/25/2025 ☐ 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)**

Testing Agency Info Sheet

Contact Name: Property Tax

Website: https://testagency.com

Phone No. To Be Listed On Tax Bill: (123)456-6789 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.:** (123)456-6789 ext. ____

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.

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

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 10th**.

☐ 3. We have a written authority to levy assessments (i.e. resolution, ordinance, certified election results) until:
☐ Expiration Date MM/DD/YYYY ☐ 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:** [Select One] **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

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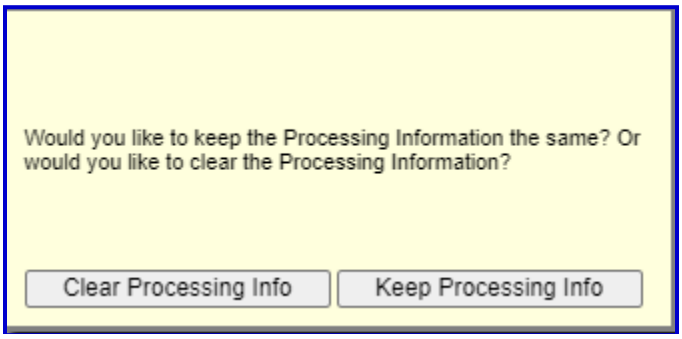
1O. Once the AIS form is saved, you can select a different Account Number (if the agency handles multiple accounts) from the drop down, once an account number is selected it will create the following Prompt giving the agency the option to save the Processing Information.



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

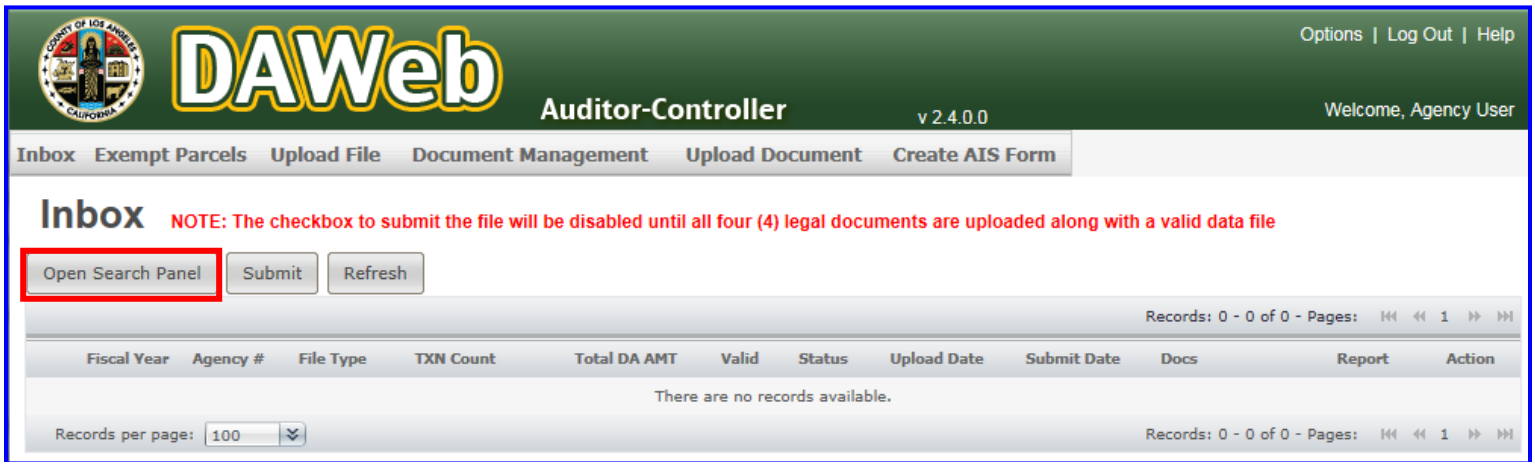
RETRIEVE THE PARCEL CHANGE REPORT

*****IMPORTANT MESSAGE*****

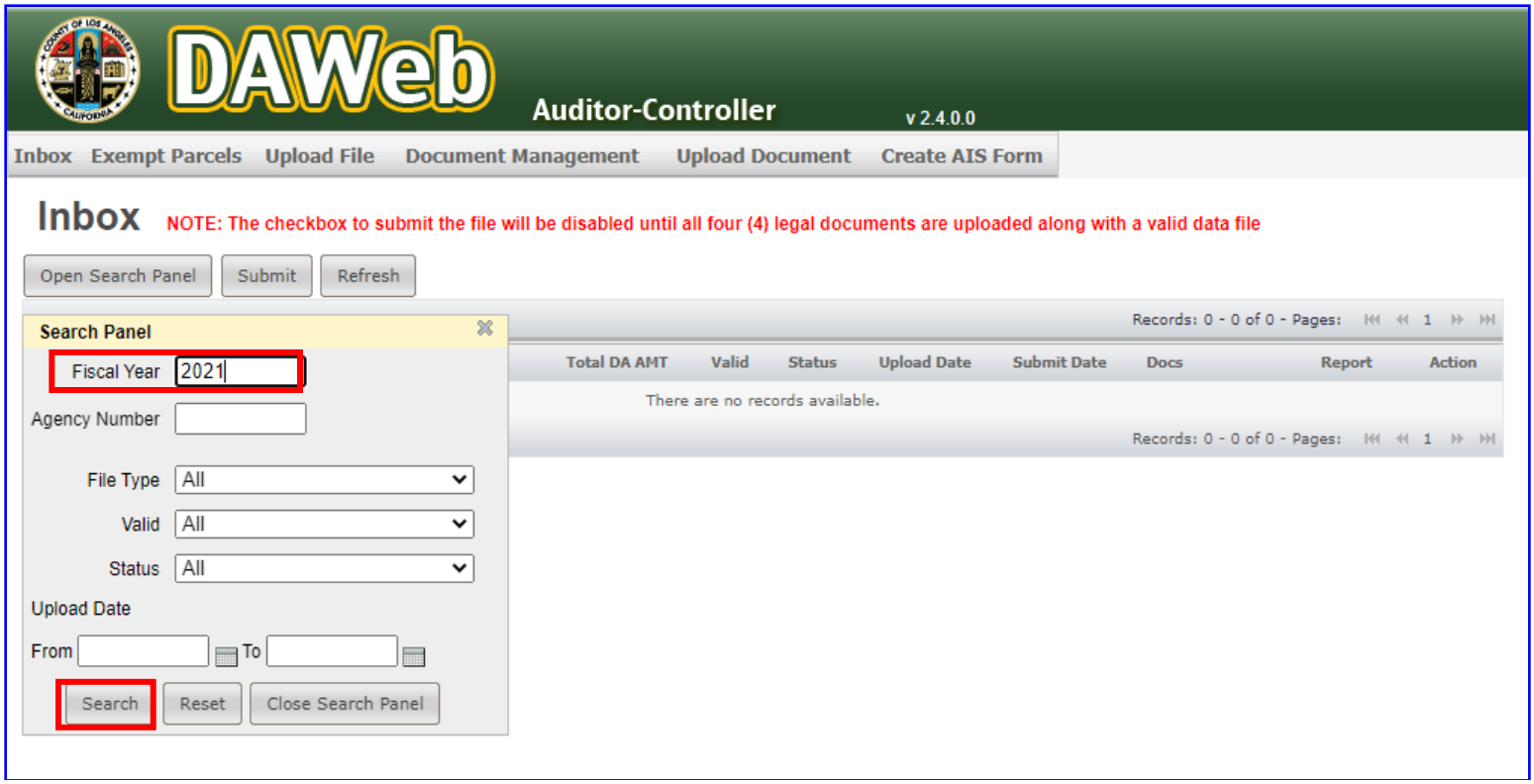
<u>New agencies cannot retrieve the Parcel Change report until the current year data file is uploaded to DAWeb.</u> Please proceed to '<u>Create the Excel Input Data File</u>' section (P. 33) or '<u>Create the Text Input Data File</u>' section (P. 42).

<u>Only returning agencies can retrieve the Parcel Change Report in this section.</u>

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 **<u>Open Search Panel</u>** tab in the **Inbox**.

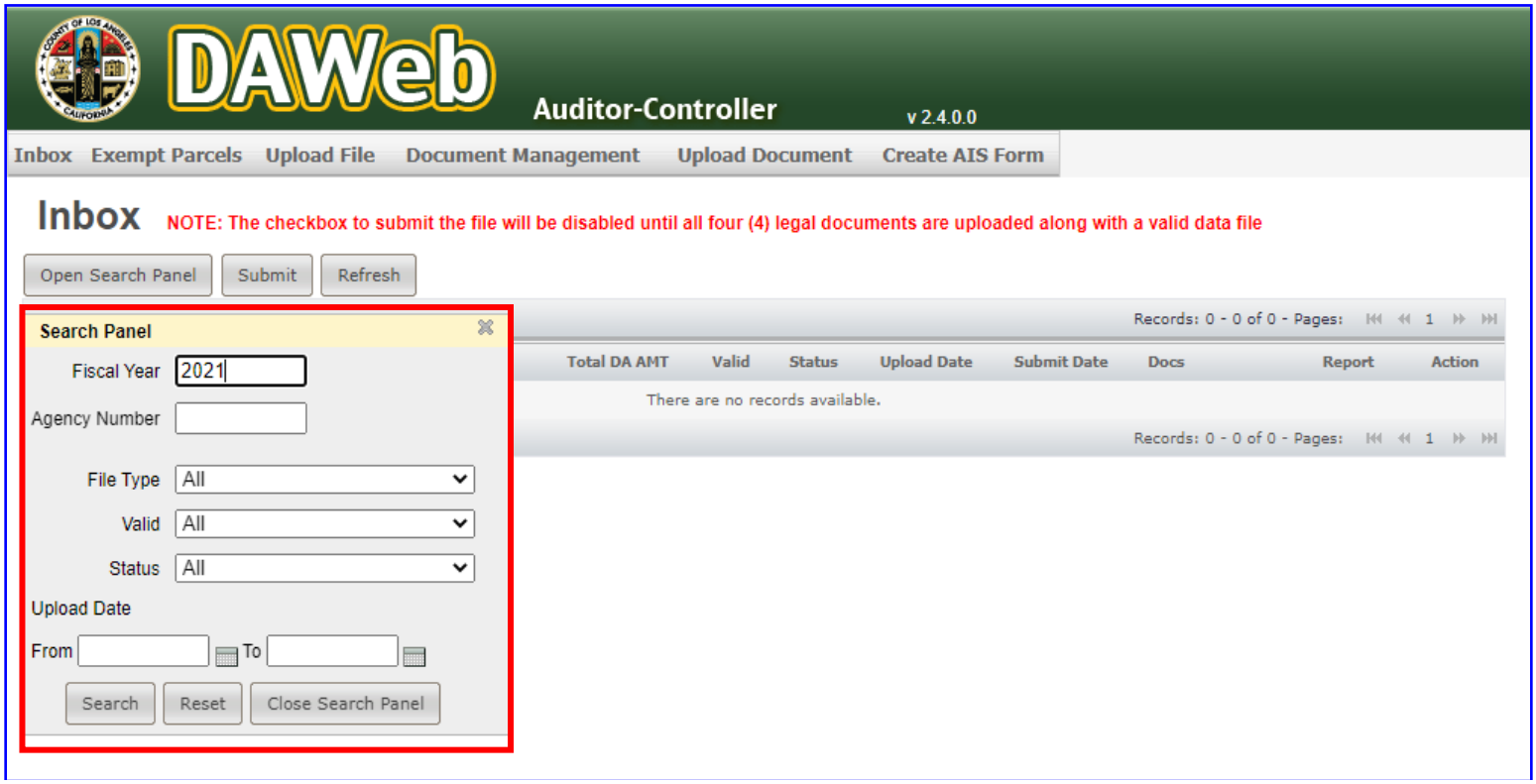


2B. Enter the **<u>previous</u> Fiscal Year** (enter 2021 in FY 2022) and click the **<u>Search</u>** button to retrieve all of your previous year files.



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**.

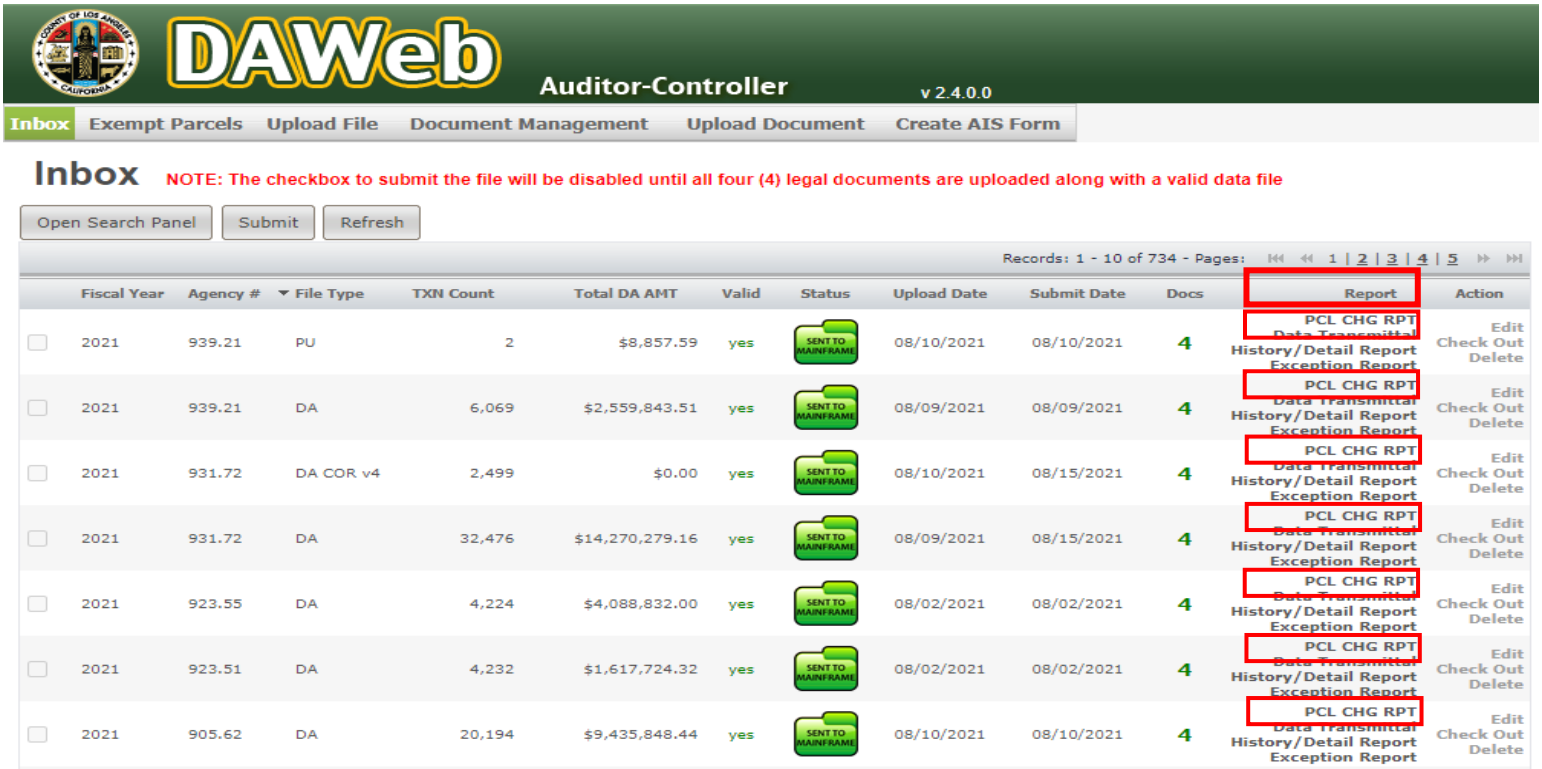
Click the **Reset** button to clear the search criteria and reset the Inbox back to the default search (current fiscal year). Click the **Close Search Panel** button to close the Search Panel.



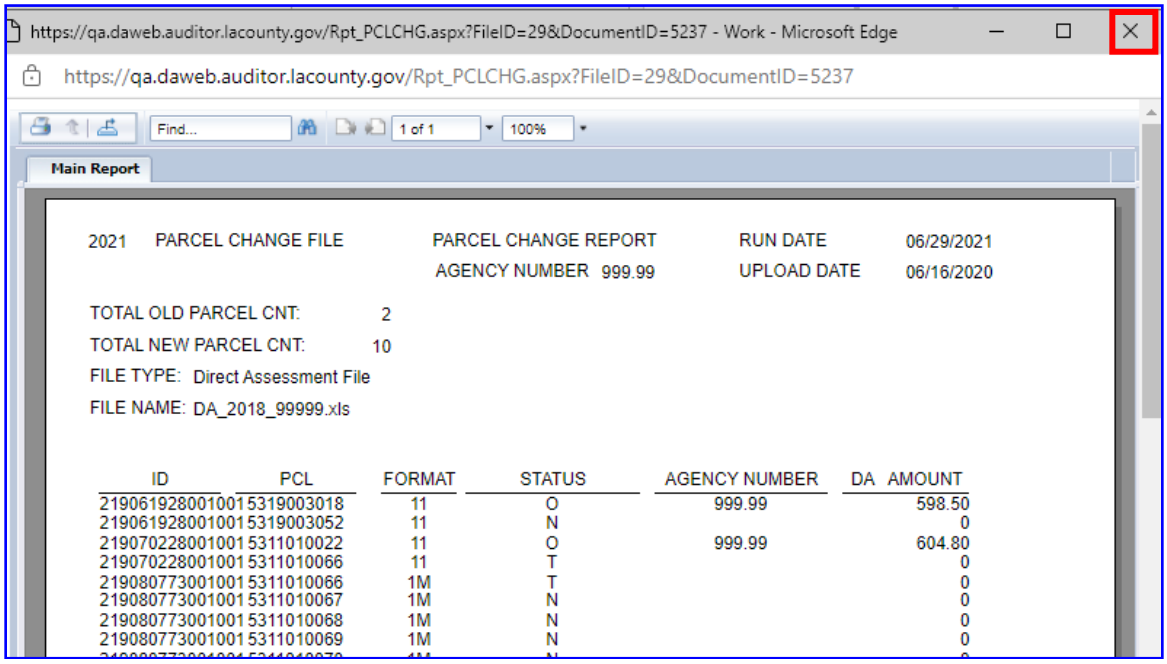
SEARCH FEATURES

1	**Fiscal Year**	Fiscal Year that the Agency Number was processed.
2	**Agency #**	Direct Assessment Agency Number assigned to each agency by the Auditor-Controller.
3	**File Type**	File Type submitted for STR processing. The four file types are as follows: • **Direct Assessment** • **Public Utility** • **DA Correction** • **PU Correction**
4	**Valid**	Indicates if the file submitted is **valid** (Valid = 'yes') or **invalid** (Valid = 'no').
5	**Status**	Tracks the progress of the agency number throughout the DA process. The status options are as follows: • **Work In Progress** • **Pending Review** • **Pending Approval** • **Supervisor Approved** • **Batched** • **Sent to Mainframe** • **Failed in Batching**
6	**Upload Date From: & To:**	- Date Range of when the file was uploaded to DAWeb.

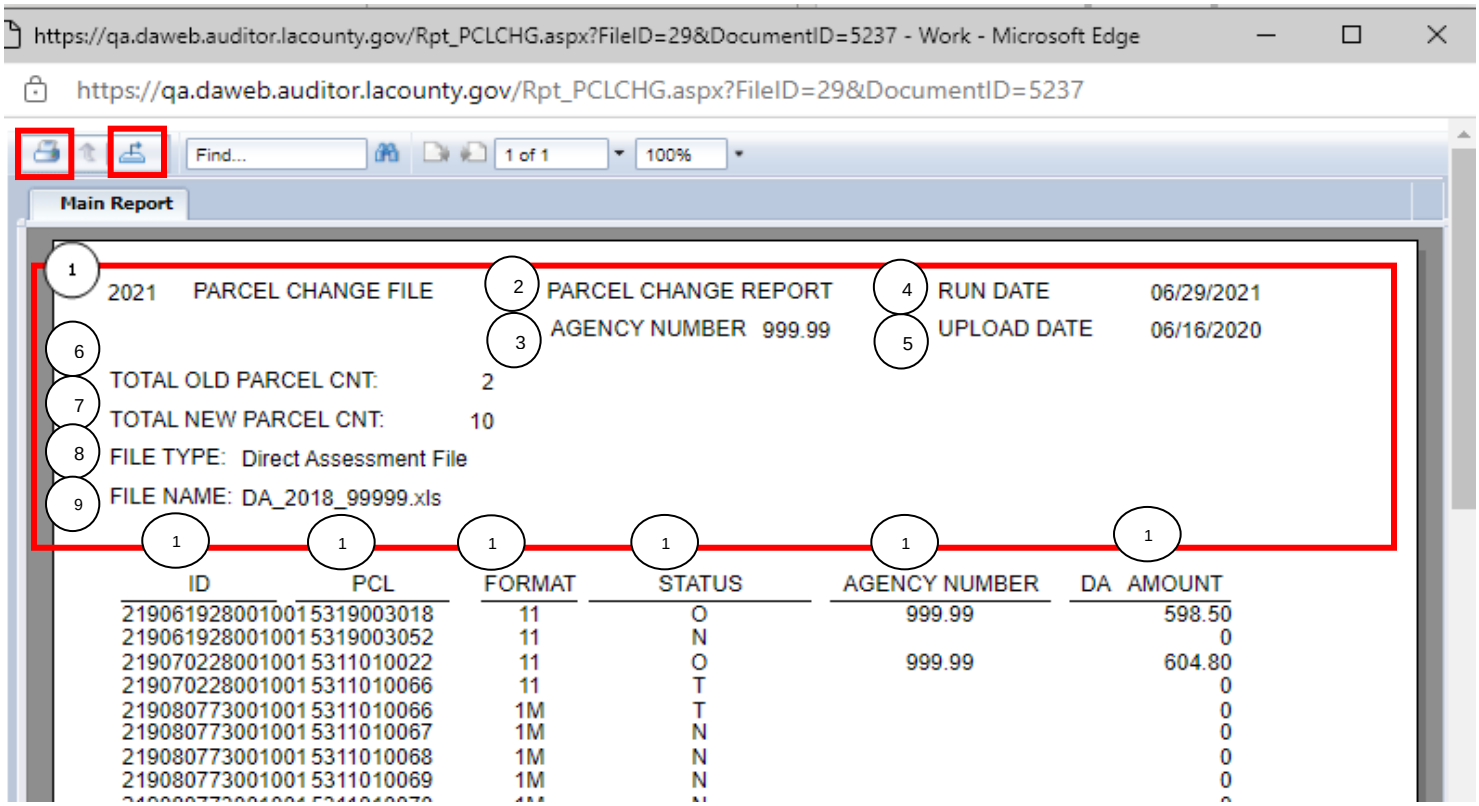
2C. Click the **PCL CHG RPT** link under the **Report** column for each of your previous year's files. The previous year's files will be run against the current year's Parcel Change file to produce the Parcel Change Report.



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.



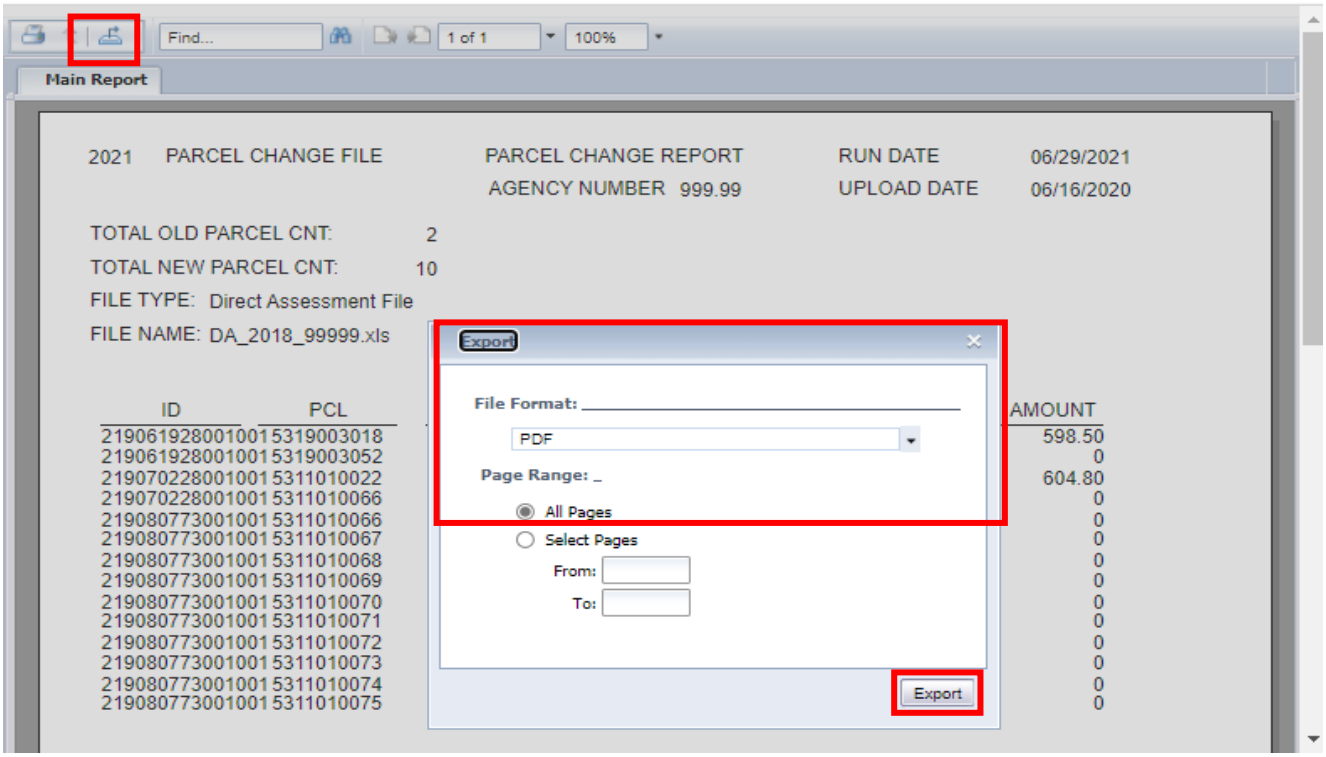
2E. **Print** or **Export** the Parcel Change report for your reference. The file can be exported to PDF or Excel format. This report will be used in the following sections: **'Create the Excel Input Data File' (P. 33) or 'Create the Text Input Data File' (P. 42)**



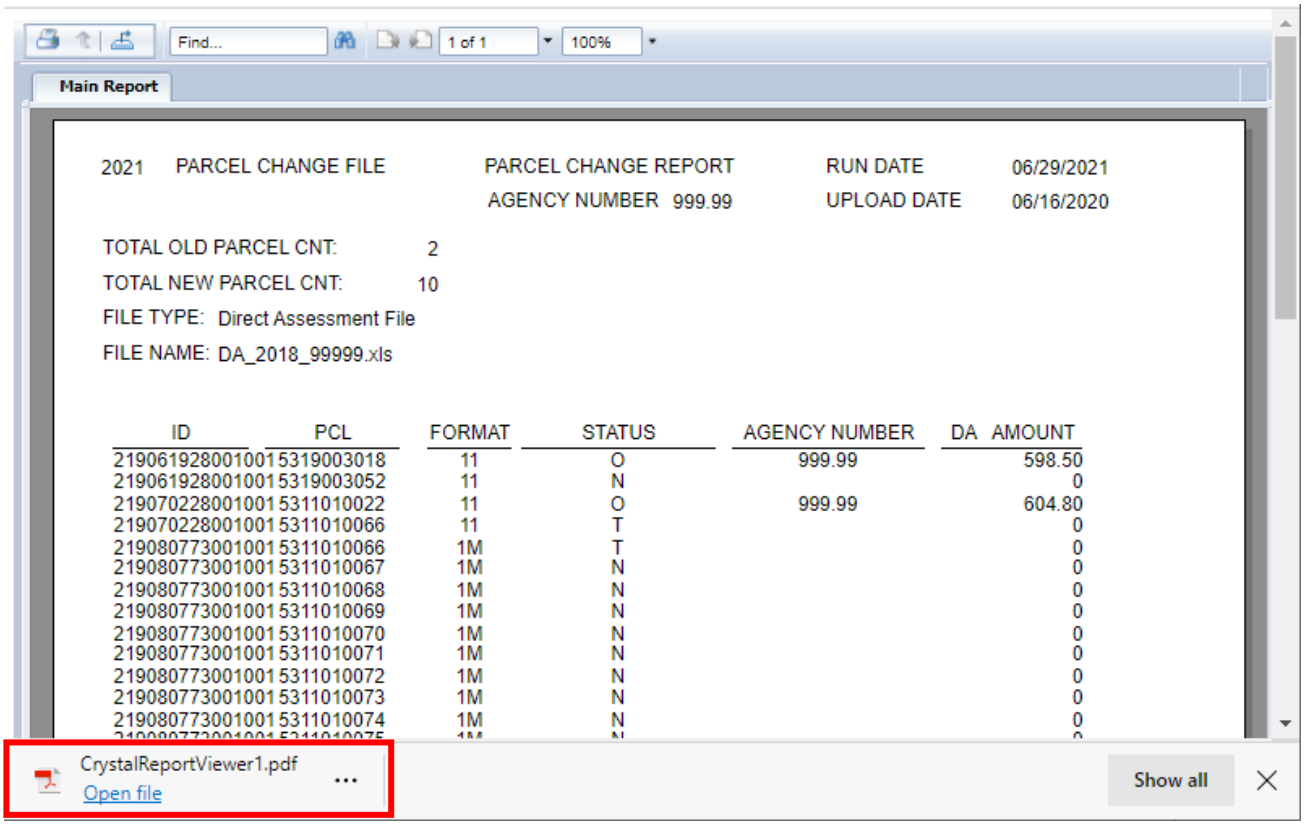
NOTE: Listed below are the fields on the **Parcel Change Report**.

1	***YYYY* Parcel Change File**	***YYYY*** = year of the Parcel Change File used in generating this report
2	**Parcel Change Report**	Report Heading
3	**Agency Number**	Displays the Agency Number used in generating this report
4	**Run Date**	Date the report was generated
5	**Upload Date**	Date that the file was uploaded onto DAWeb
6	**Total Old Parcel Count**	Total count of parcels with status = **O** (Old)
7	**Total New Parcel Count**	Total count of parcels with status = **N** (New)
8	**File Type**	Direct Assessment File, Public Utility File, DA Correction, or PU Correction File
9	**File Name**	File name uploaded by agency
10	**ID**	Assessor ID number used to track parcel changes
11	**Parcel No**	Property identification number
12	**Format**	Indicates how many parcels were affected during the parcel change • **M1** (many to one) – two or more (old + temp) parcels got converted into one new parcel. • **1M** (one to many) – one old parcel got converted to two or more (temp + new) parcels. • **11** (one to one) – one old parcel got converted to one new parcel.
13	**Status**	Indicates the status of the parcel: **N** (New), **O** (Old) or **T** (Temporary) • ***Add*** parcels with **'N'** status to the new roll and assign assessment amount • ***Delete*** parcels with **'O'** status for the new roll. • ***Do Not Add*** parcels with **'T'** status to the new roll
14	**Agency Number**	Agency number associated with the Parcel Change Report.
15	**DA Amount**	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.

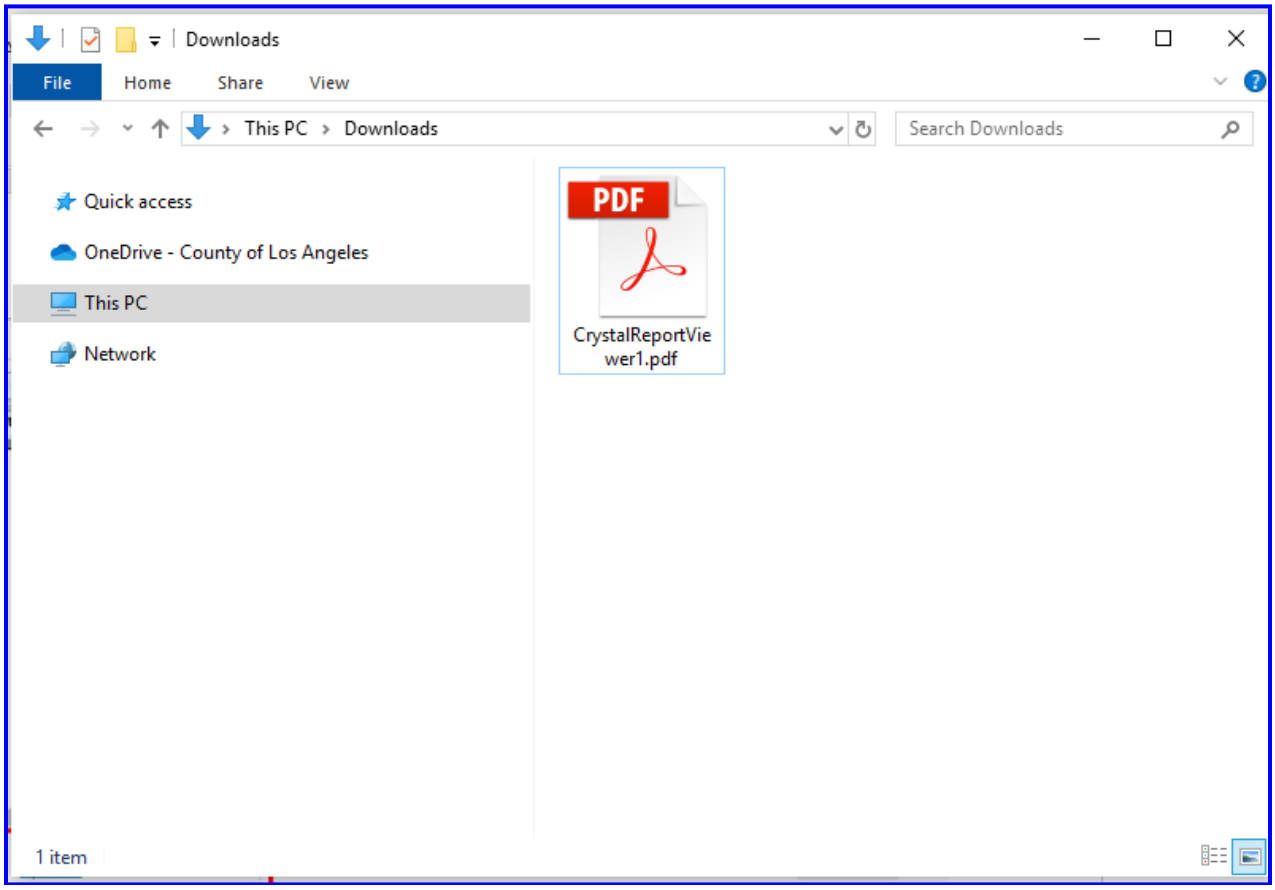
2F. To Export and Save as **PDF**, click the **Export icon**, select **PDF** from the File Format drop down box and click the **Export** button. To Export and Save as Excel, skip to step 2J **(P. 31)**



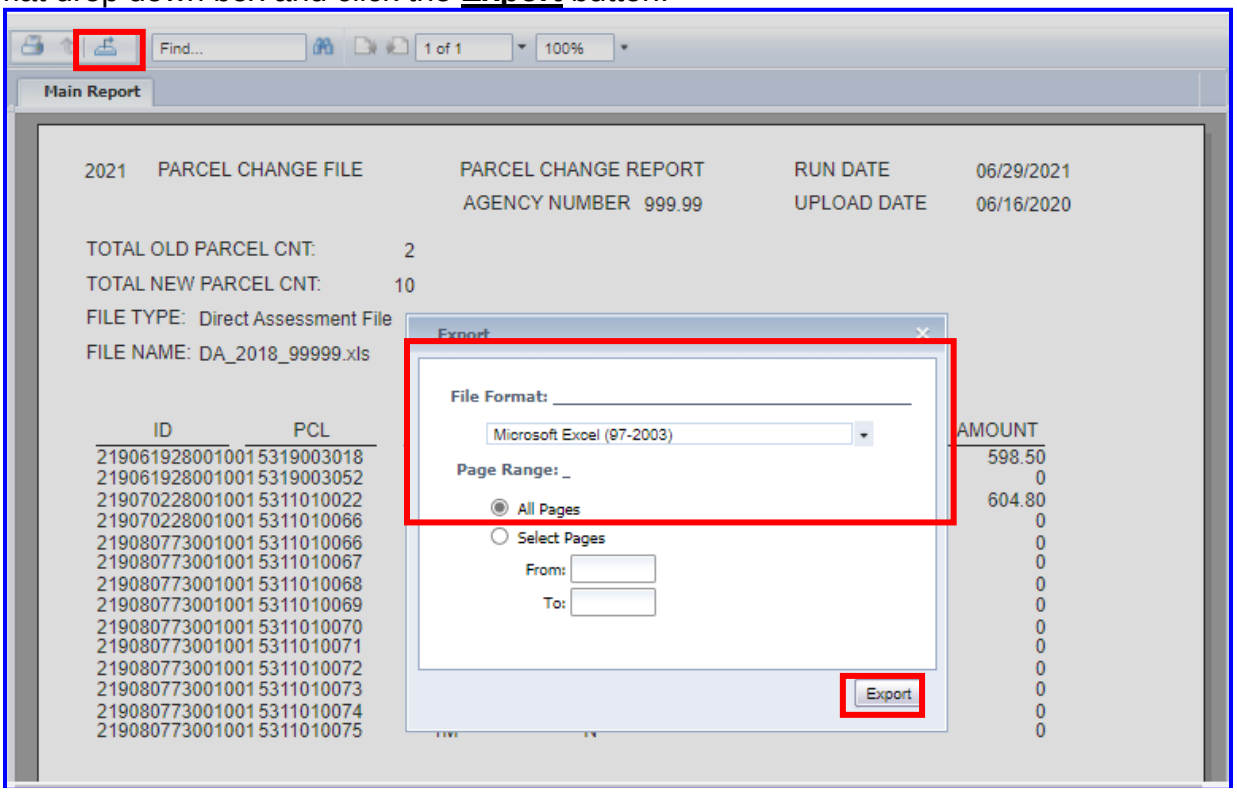
2G. File will automatically download.



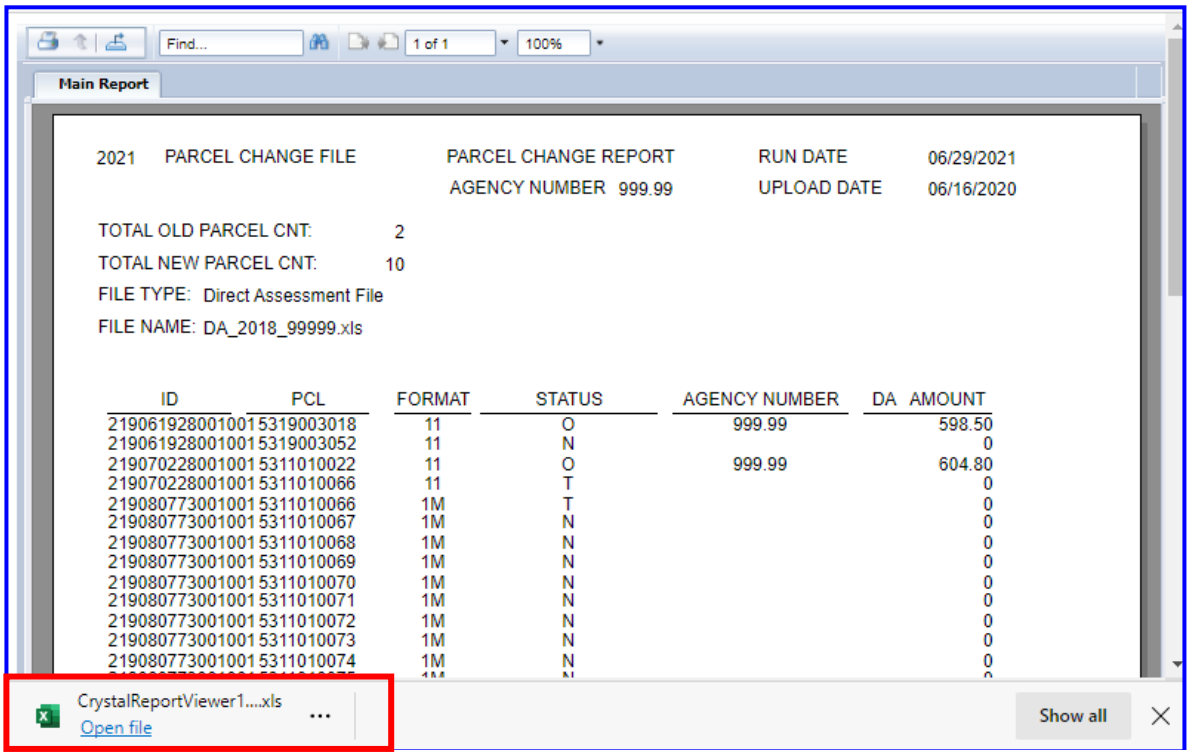
2H. You can find the file in the Downloads folder.



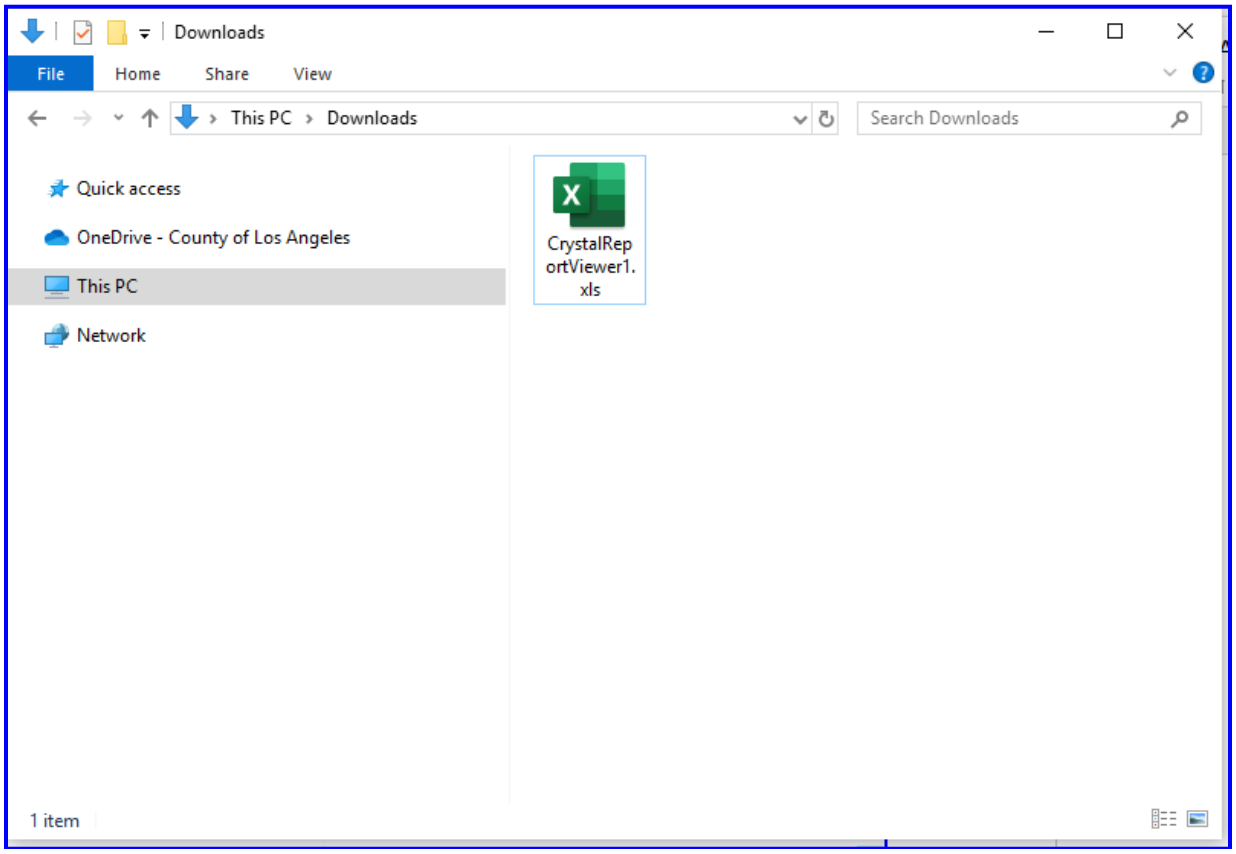
2I. To Export and Save as **Excel**, click the **Export icon**, select **Microsoft Excel (97-2003)** from the File Format drop down box and click the **Export** button.



2J. File will automatically download.



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



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

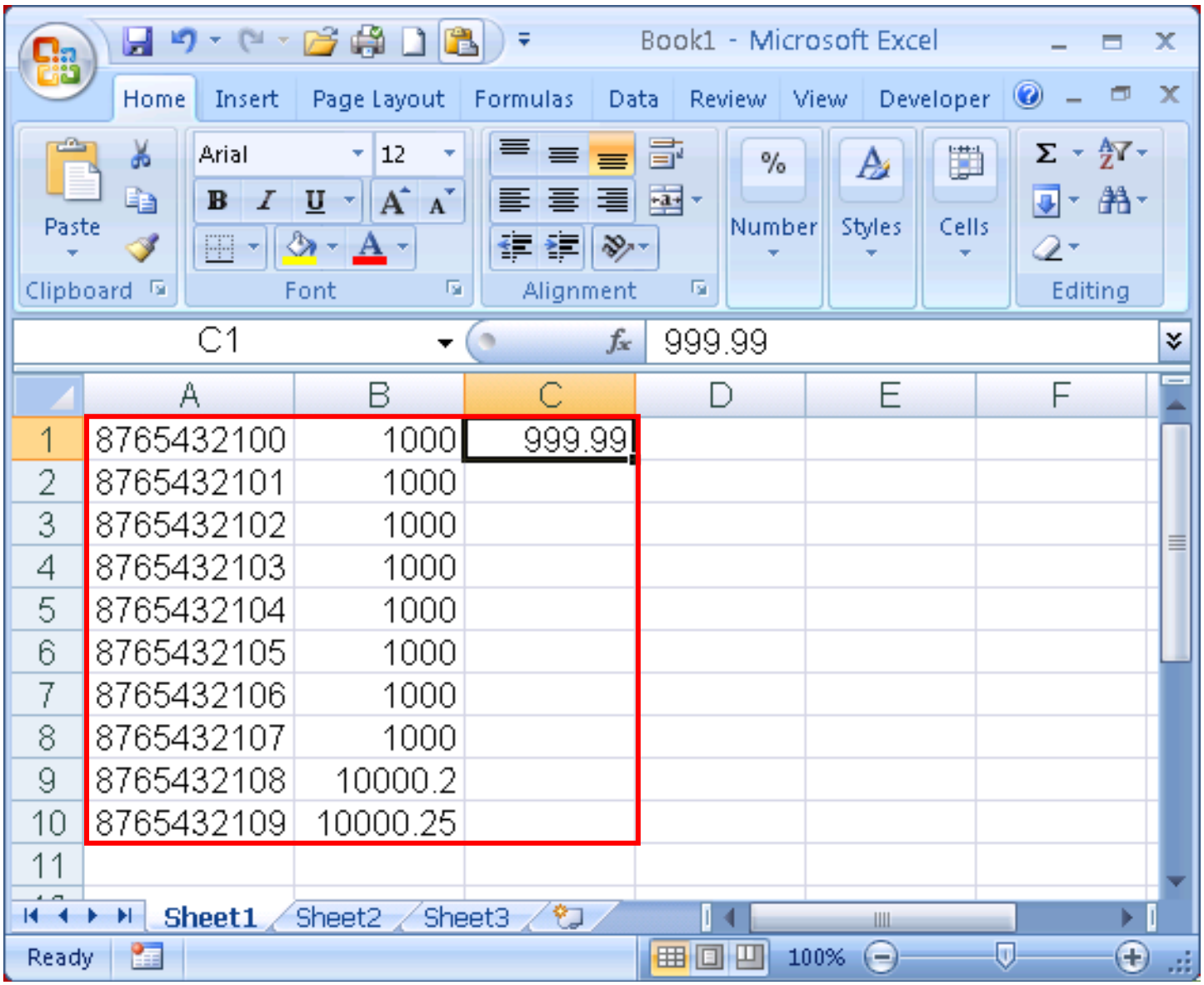
- **<u>Create the Excel Input Data File</u> (P. 33) or**
- **<u>Create the Text Input Data File</u> (P. 42)**

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** – <u>enter one occurrence in cell C1 only</u>

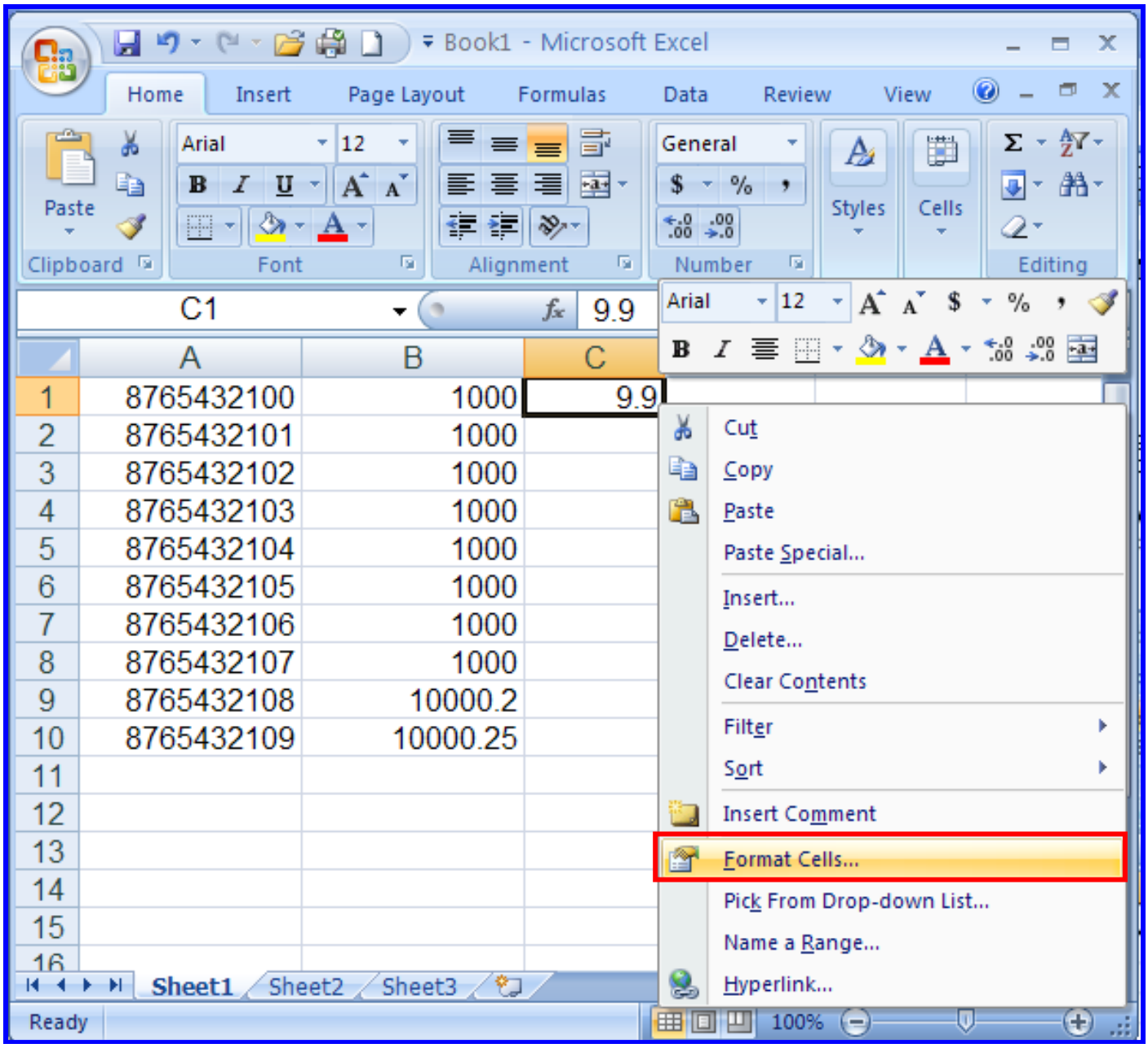


NOTE: For Agency Numbers with **leading and/or ending zeros**, cell **C1** must be set to **Text format** before entering the agency number. This will ensure that leading and ending zeros are displayed and not cut off by Excel auto formatting. Please make sure that the Agency number is **5 digits and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

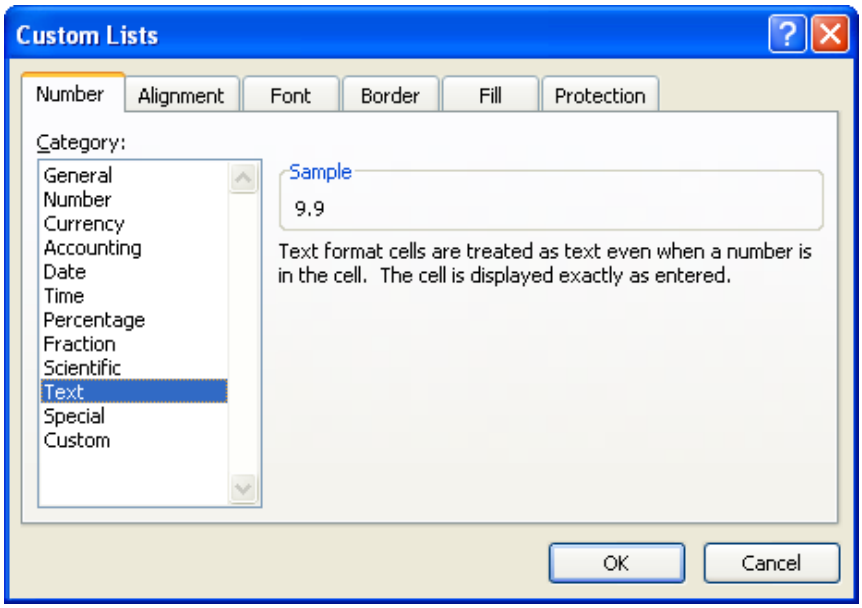
For example, **agency number 009.90 should not** be displayed on the Excel file as **9.9 or 9.90** as it will **result in an invalid agency number.**

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

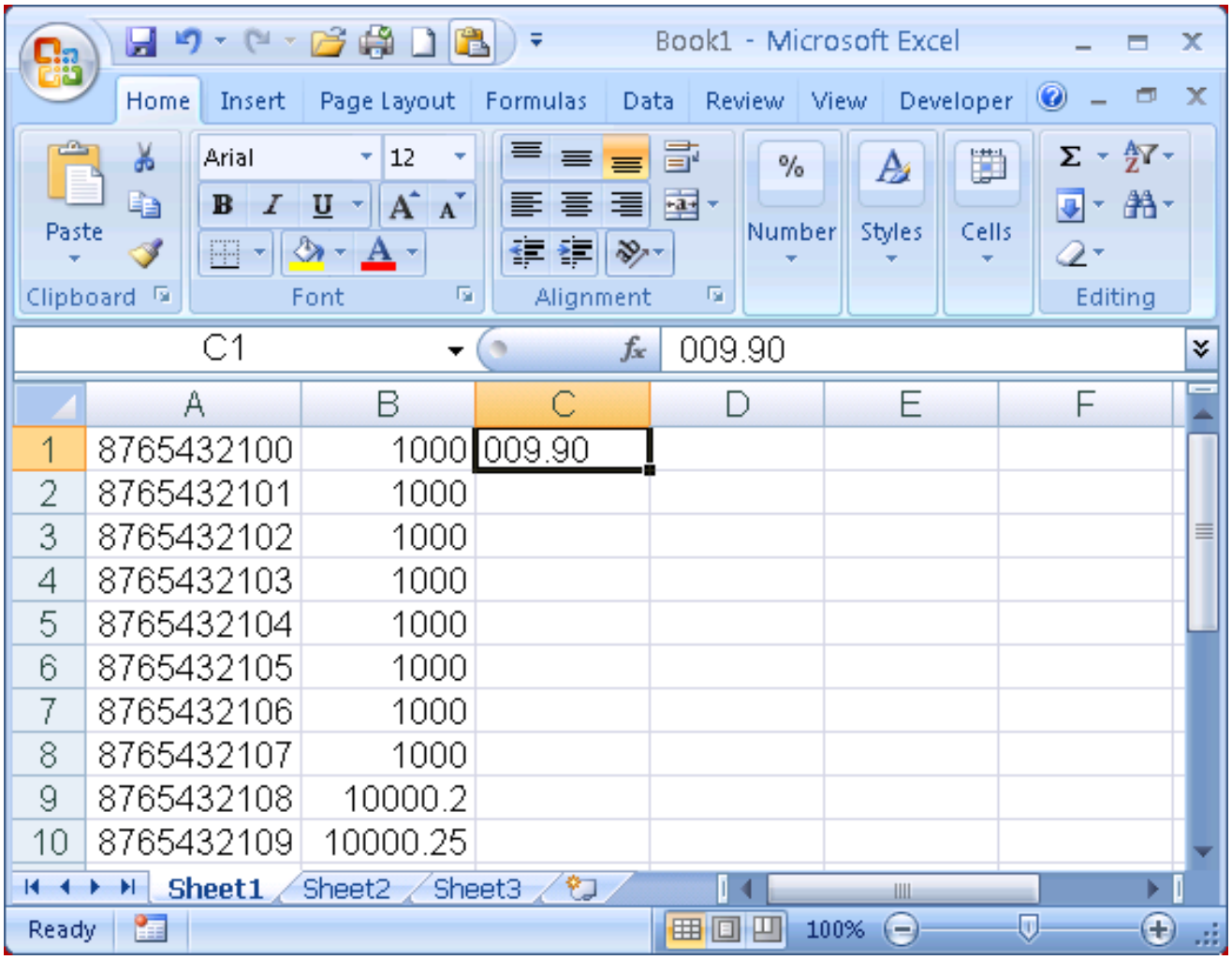
- **Right click** on cell C1 and select **Format Cells…** from the pop-up menu.



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

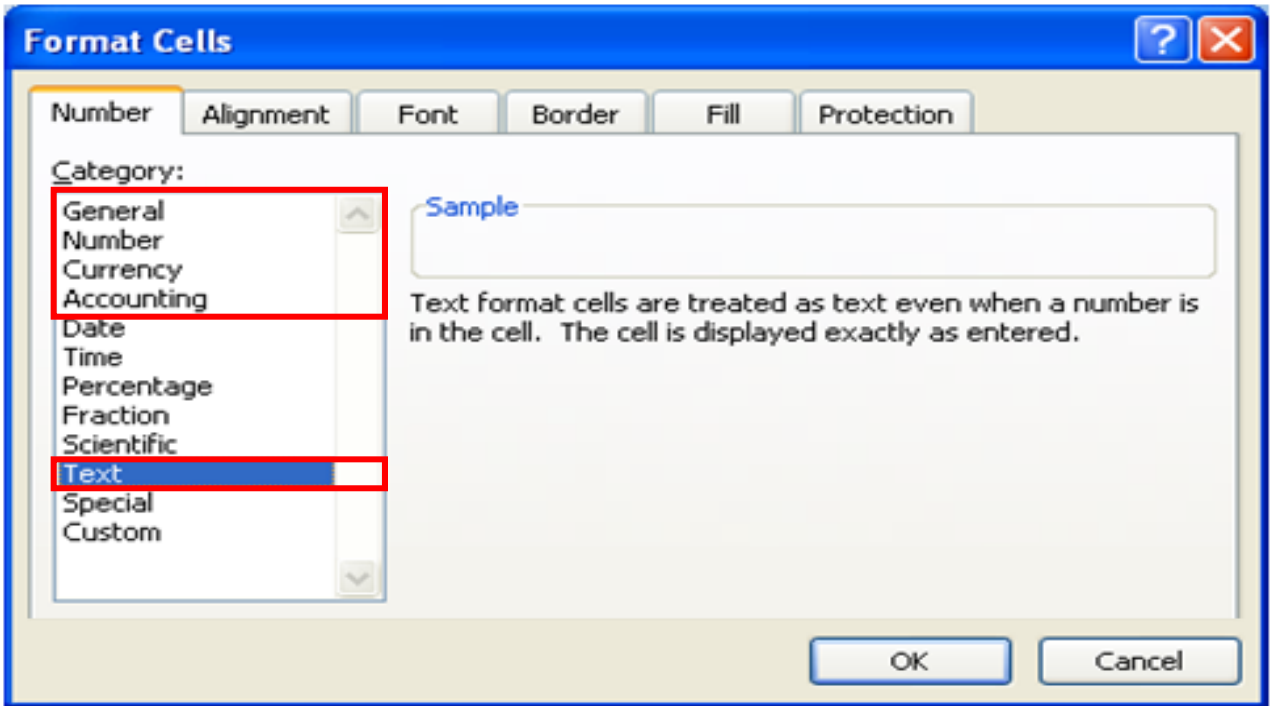


- Re-enter the agency number in cell **C1** including leading and ending zeros. **Agency number must be 5 digits and in 2 decimal format.**



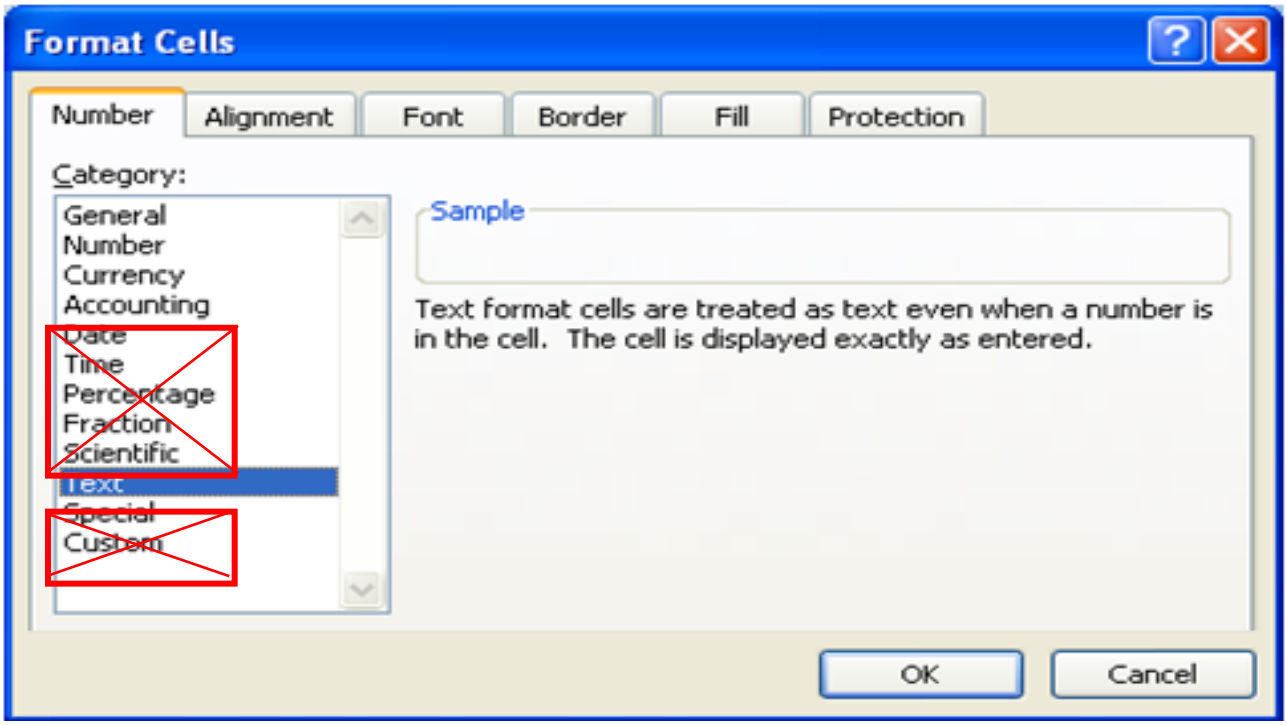
NOTE: The following **formats are accepted*:***

- **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 **<u>not</u>** use the **following formats:**

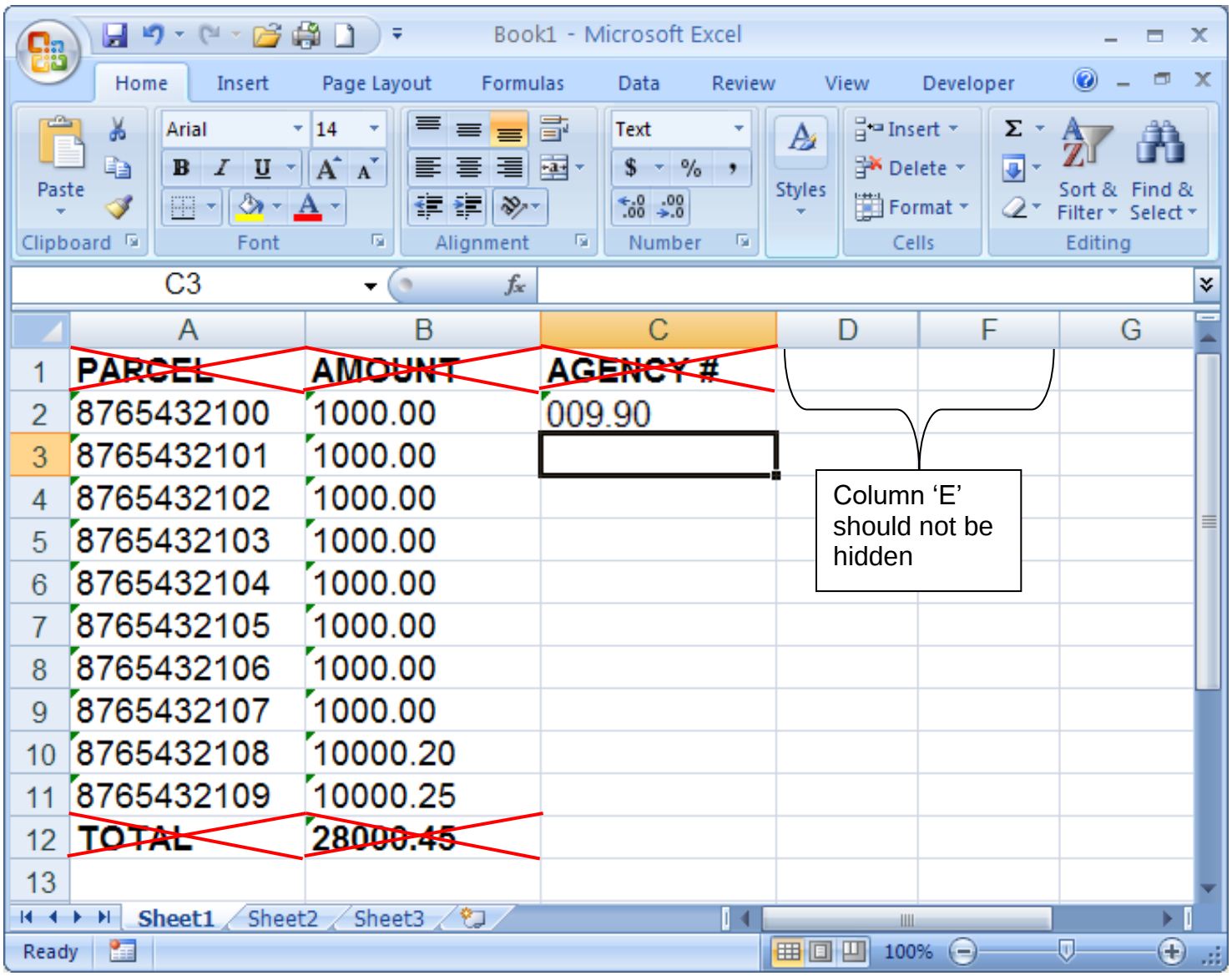
- **Date, Time, Percentage, Fraction, Scientific, Special, Custom**



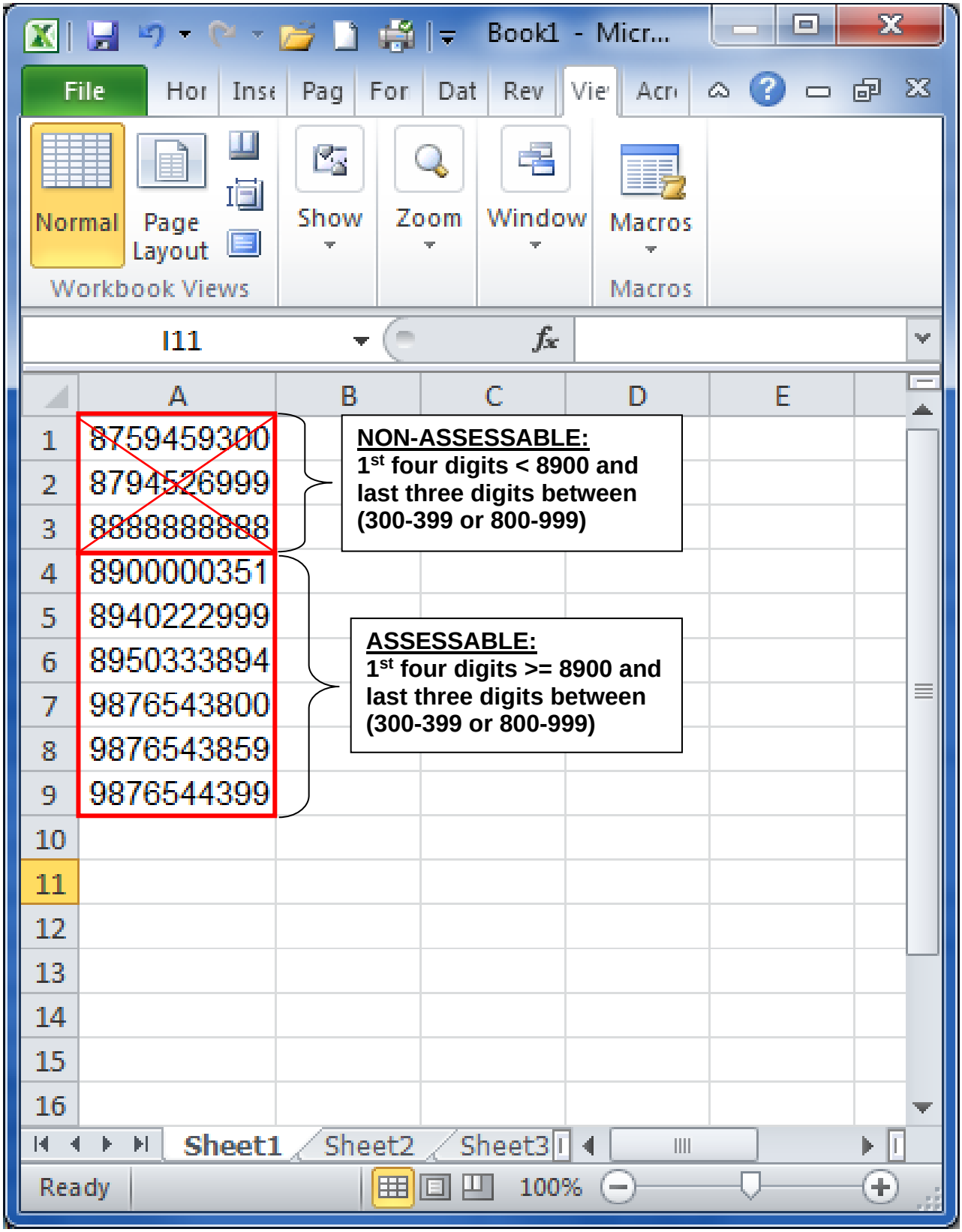
NOTE: Enter the Parcel Number, Assessment Amount and Agency number only.

Do **not** include the following:

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

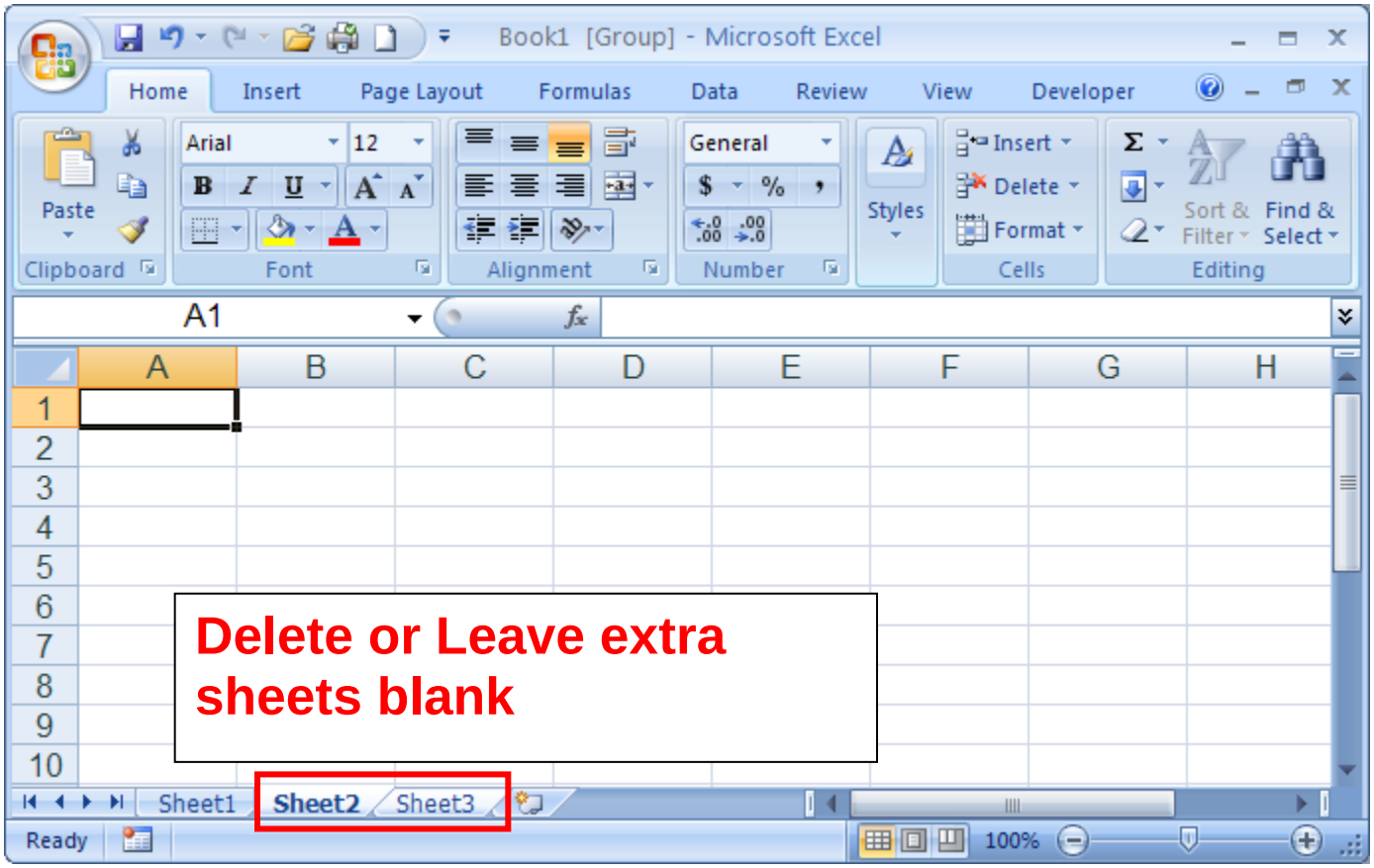


<u>NOTE for DA, PU and COR files:</u> **Exclude** parcels where the **first four digits are less than 8900 <u>AND</u> the last three digits end between (300-399 or 800-999).** These **Non-assessable parcels** are government owned, and are exempt from Direct Assessments.

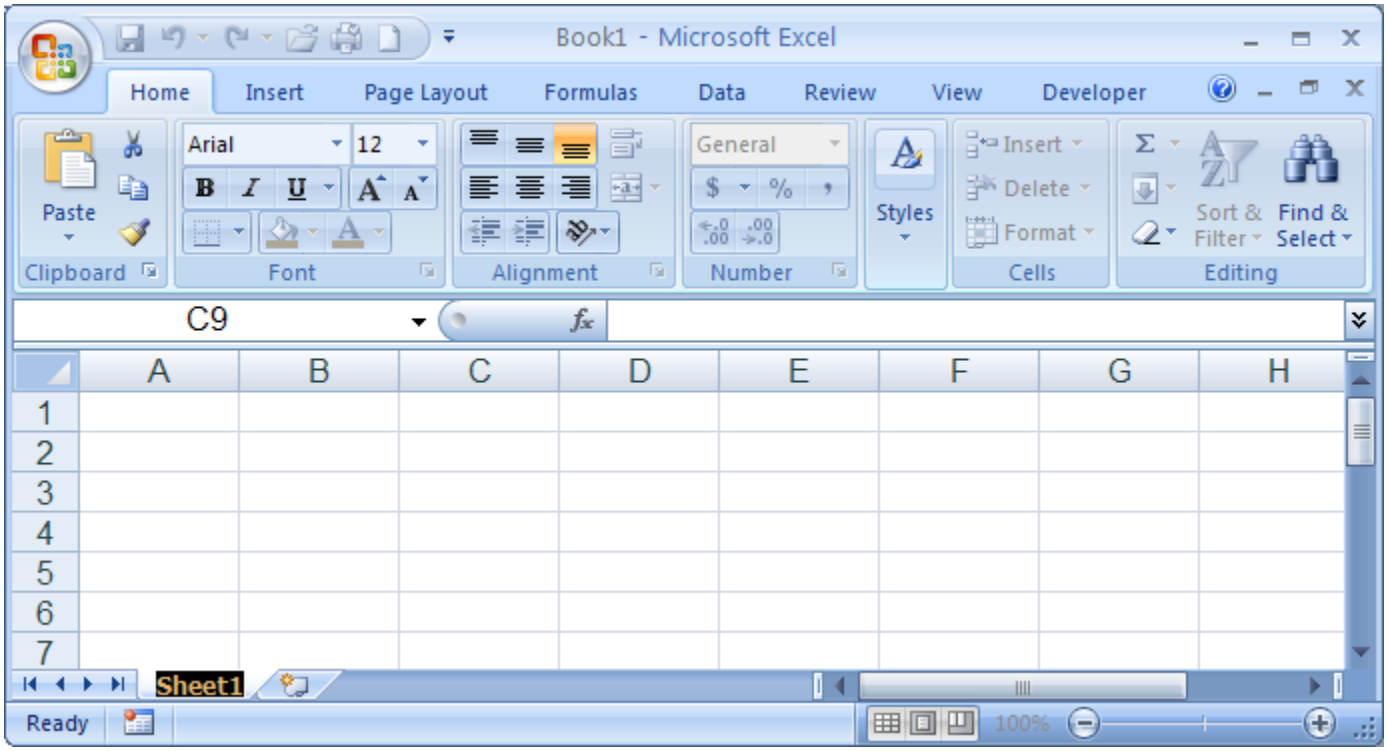


]

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:**

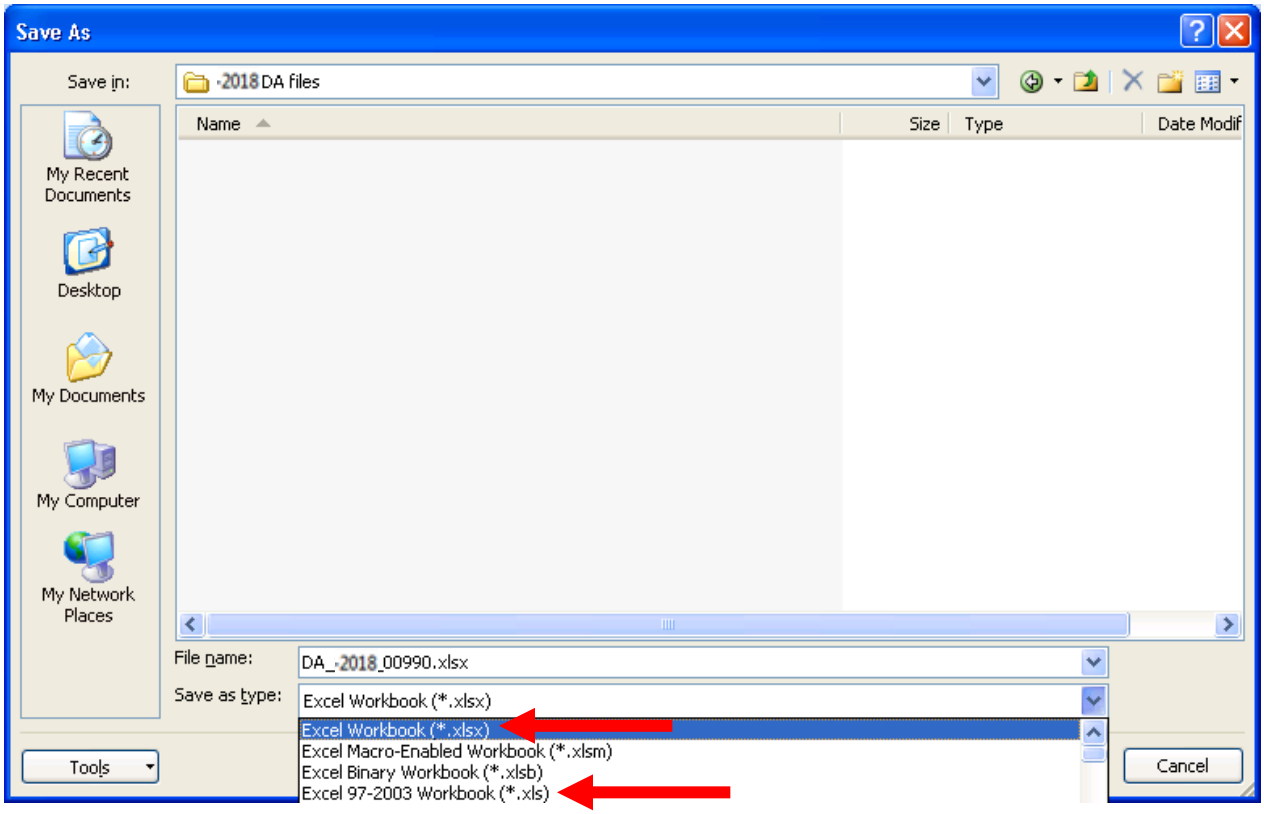
FIELD:	GUIDELINE:	EXAMPLE OF ERROR:
PARCEL	**DA, PU and COR files:** if the first four digits of the Parcel number is less than '8900' then **the last 3 digits must not end in 300-399 or 800-999**	5934820**883** 8584827**999**
	DA Exempt Parcel file: the **first four digits of the Parcel number must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

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

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

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

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

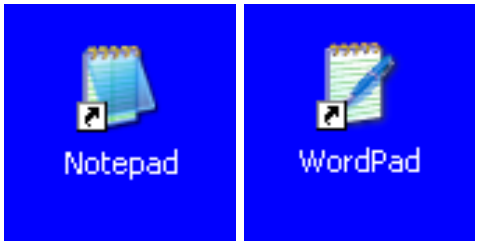


3E. Proceed to the following sections after the files have been formatted and saved.

- **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

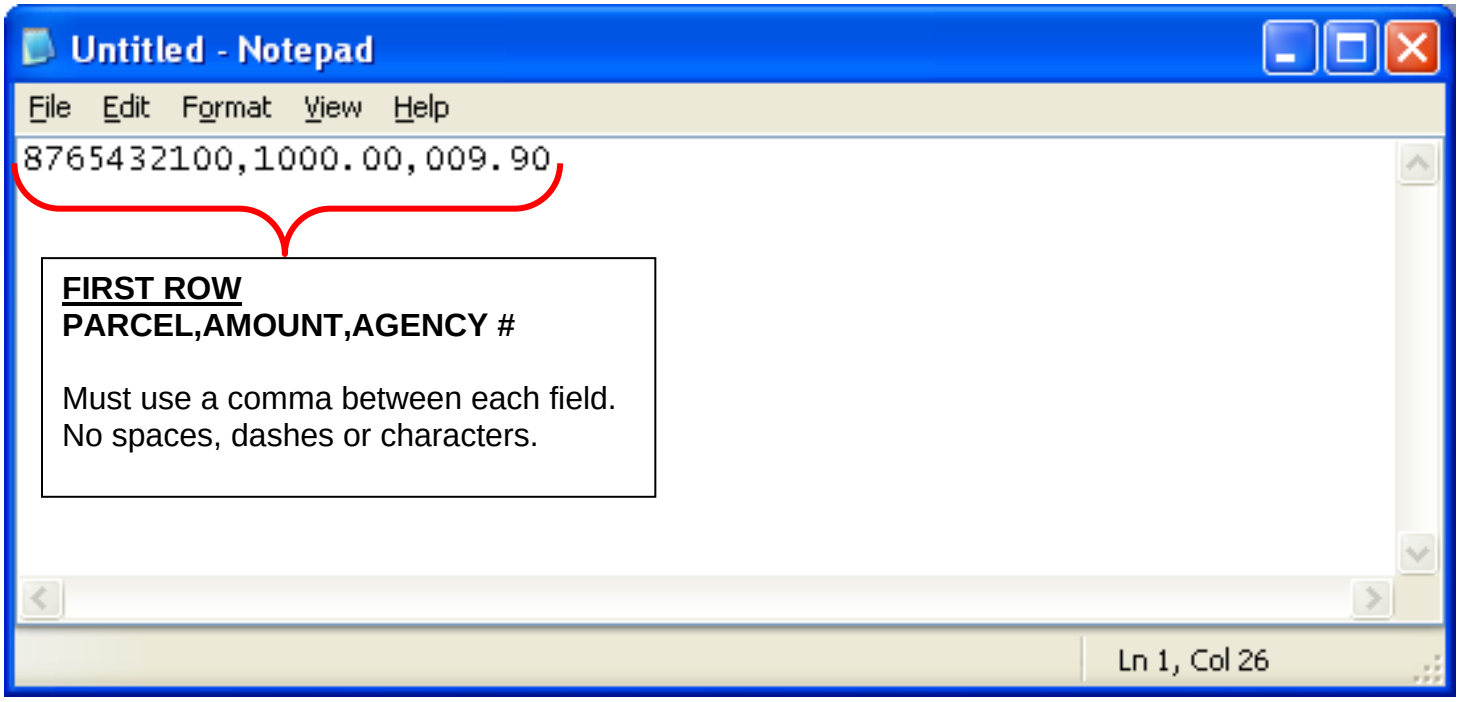
4A. Open **Notepad** or **WordPad**



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.

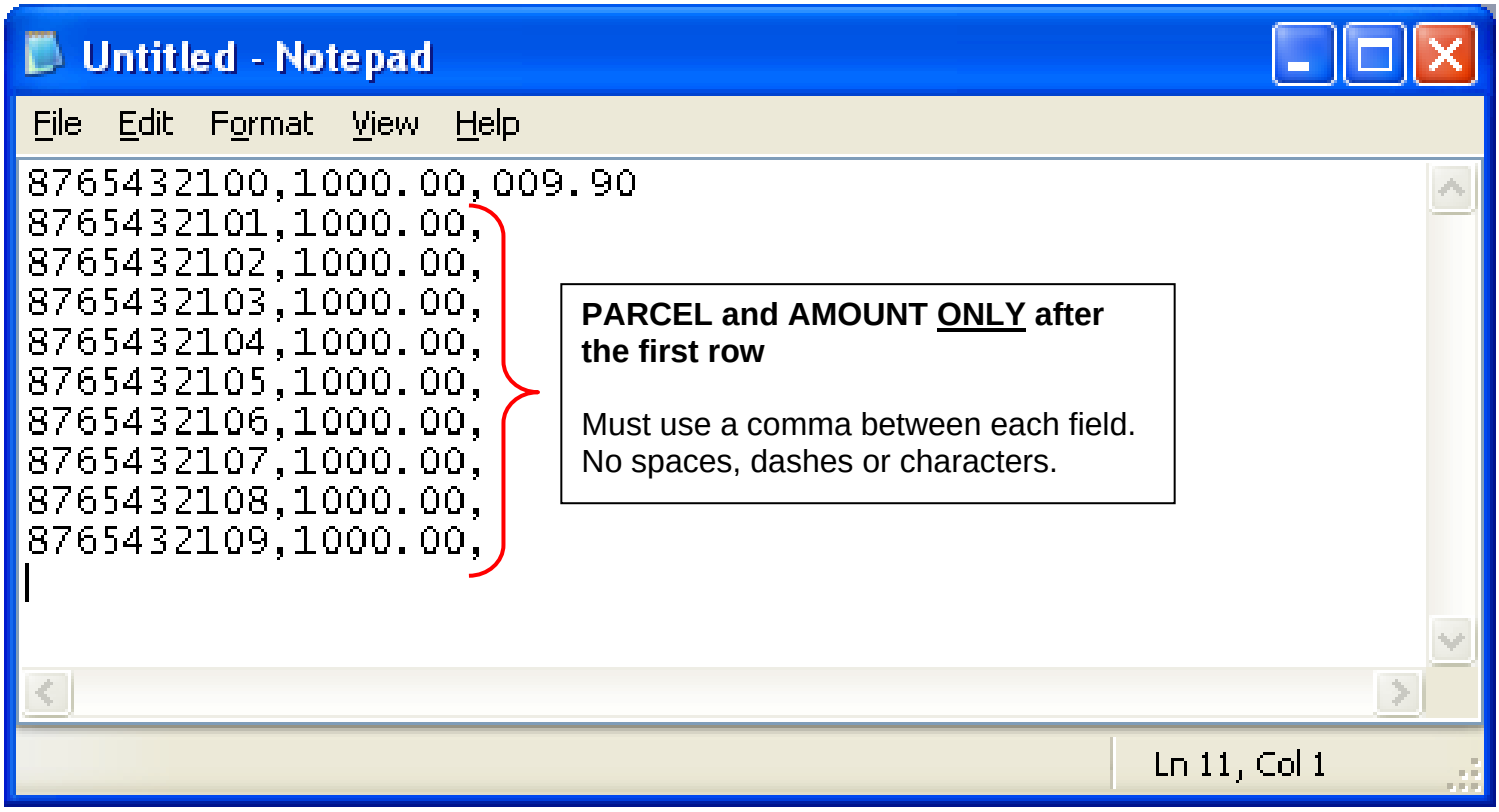
NOTE: Must use a comma between each field. Use commas only. Also, do **not** use any spaces, letters, dashes or special symbols or characters (!, @, #, $, %, ^, &, *, etc)



4C. Enter the following fields <u>after</u> 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**:

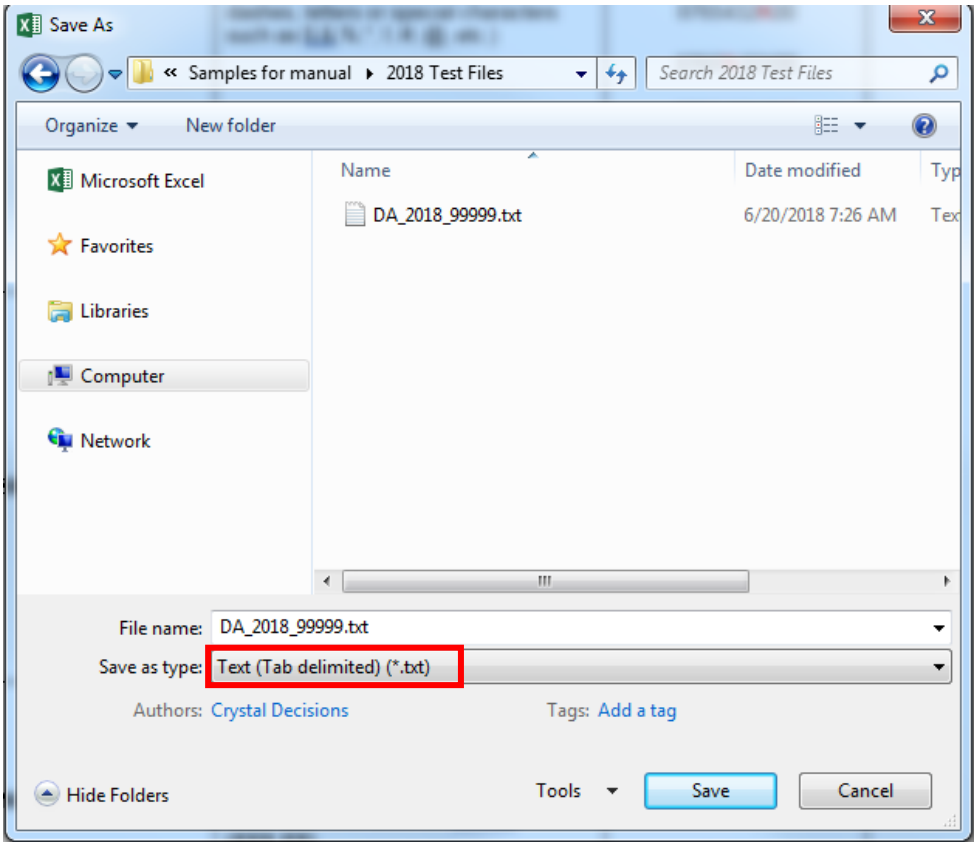
FIELD:	GUIDELINE:	EXAMPLE OF ERROR:
PARCEL	**<u>DA, PU and COR files:</u>** if the first four digits of the Parcel number is less than '8900' then **the last 3 digits must not end in 300-399 or 800-999**.	5934820**883** 8584827**999**
	<u>DA Exempt Parcel file:</u> the **first four digits of the Parcel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

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

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

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

NOTE: '<u>Save as type</u>:' should be Text Documents **(*.txt)** and click the **<u>Save</u>** button.



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

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

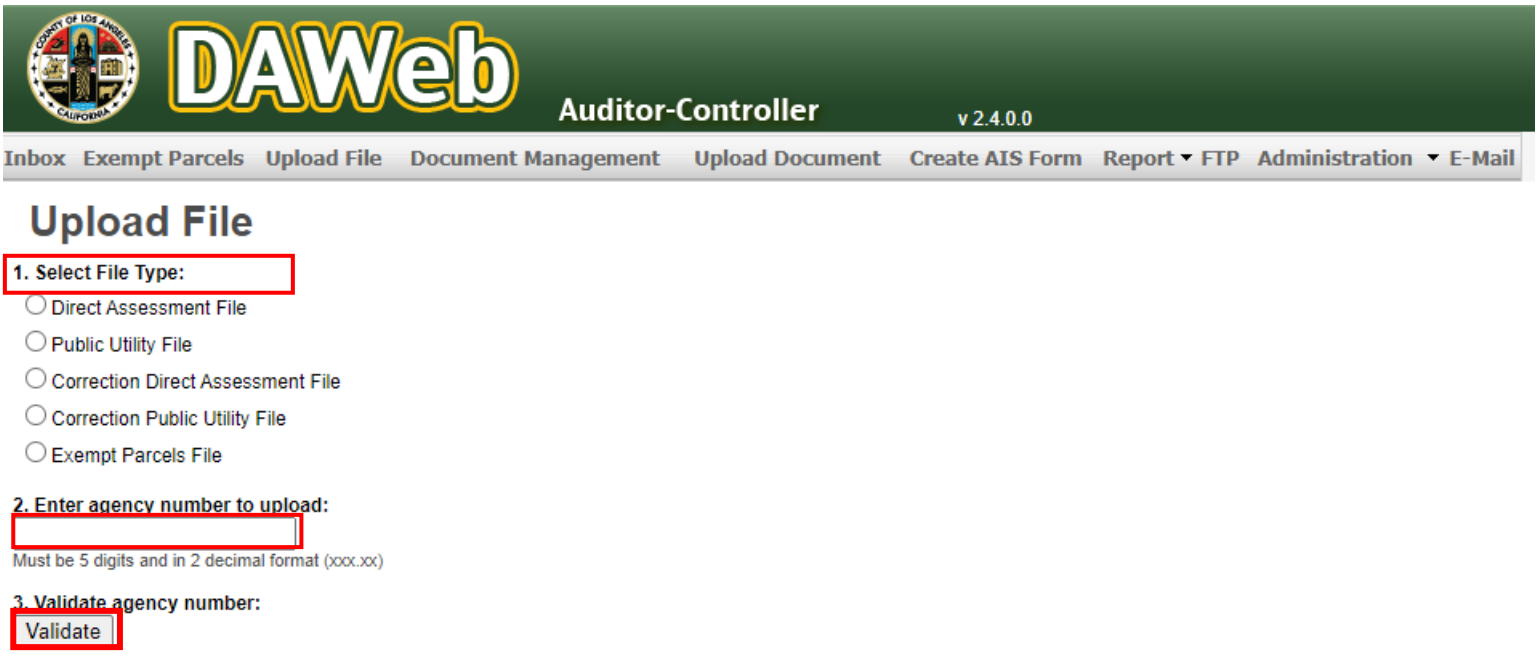
UPLOAD ORIGINAL DIRECT ASSESSMENT AND PUBLIC UTILITY FILES

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.

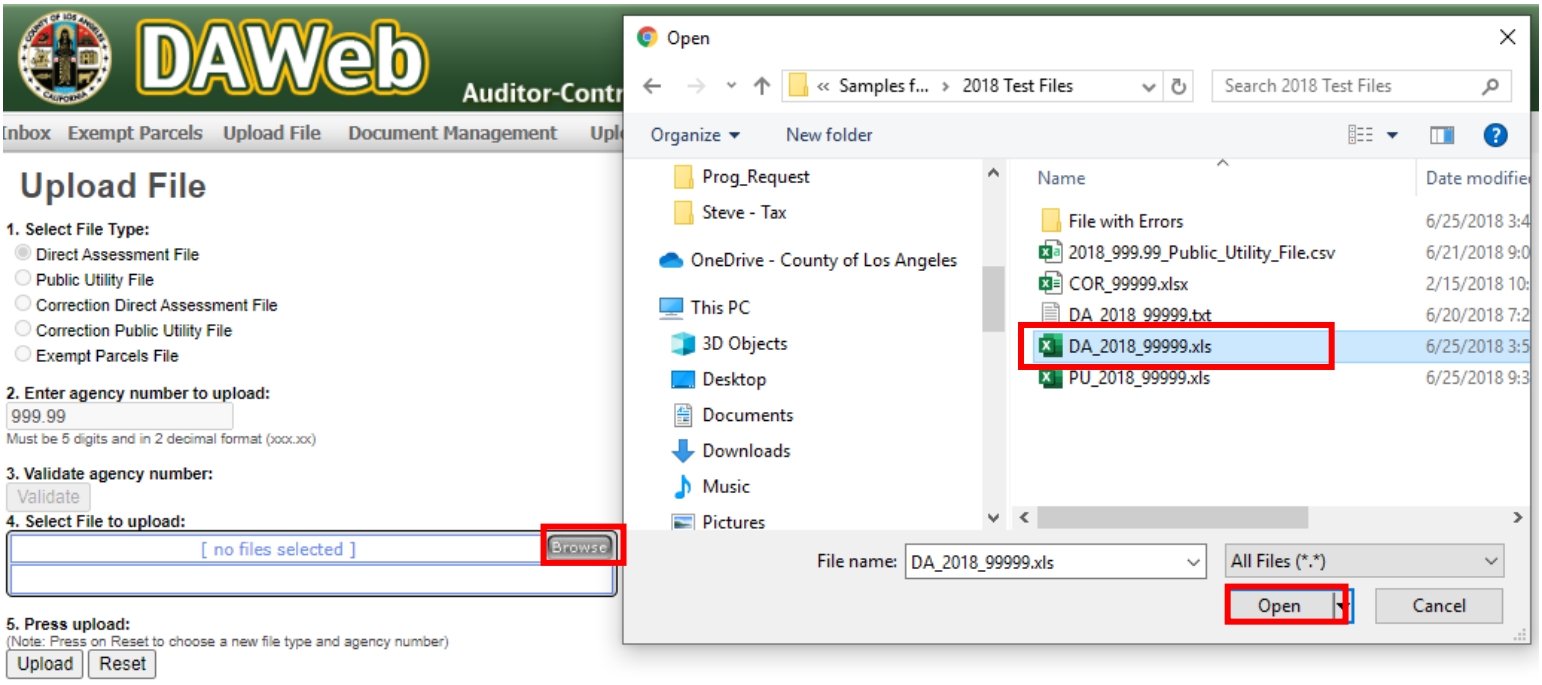
5B. Perform the following upload steps:

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.

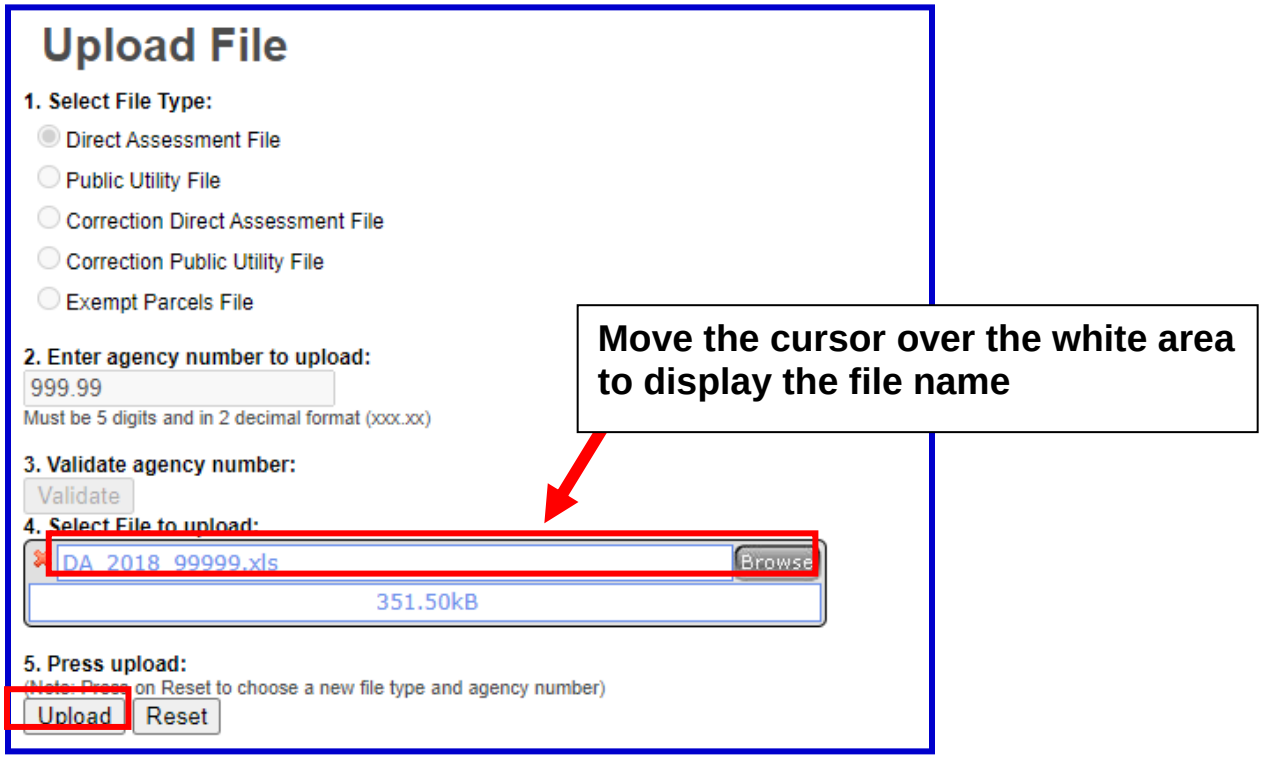


NOTE: An original Direct Assessment or Public Utility file must be uploaded before a Correction file can be uploaded for the same agency number. To upload a correction file, go to **'<u>Upload Correction File and Correction Data Transmittal</u>'** section **(P. 100)**.

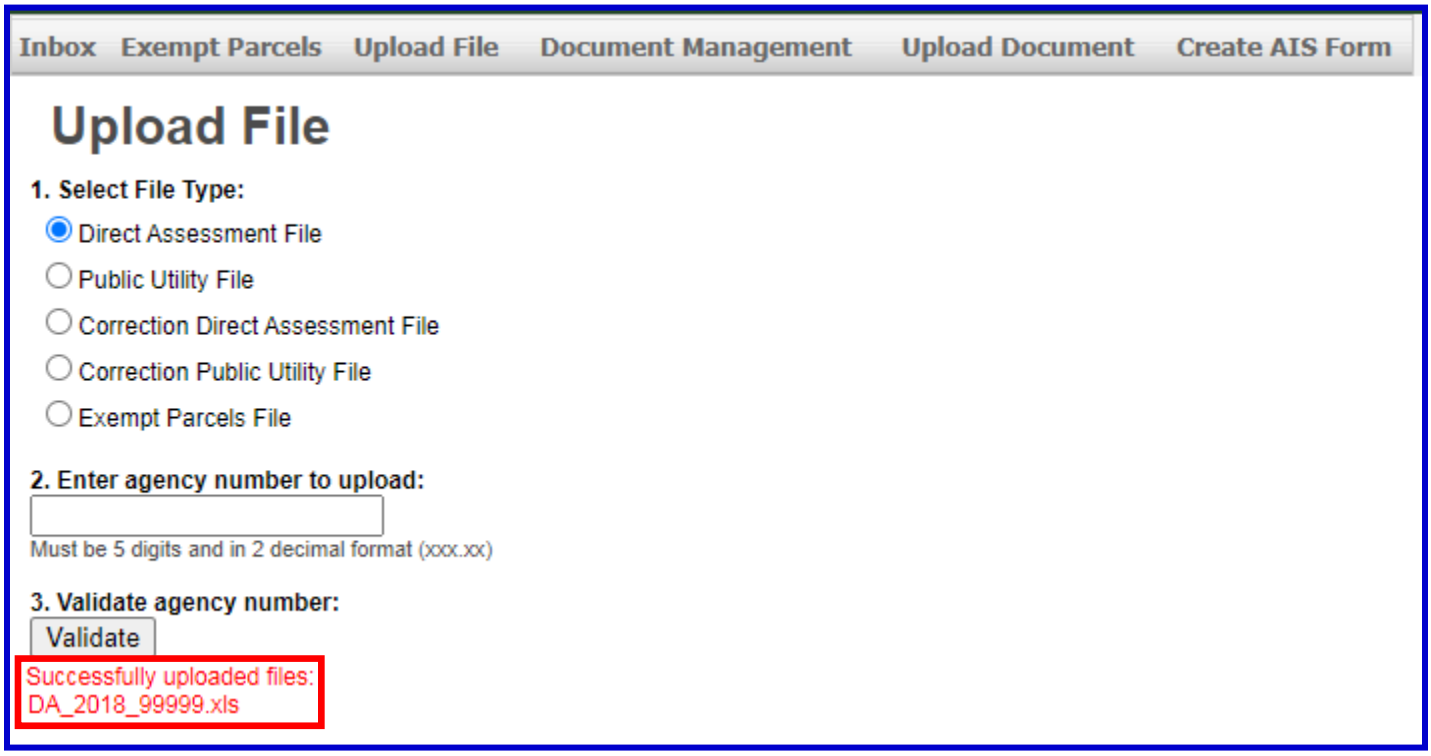
5C. Click the **<u>Browse</u>** button in step 4, select a file to upload and click the **<u>open</u>** button or double-click on a file to upload.



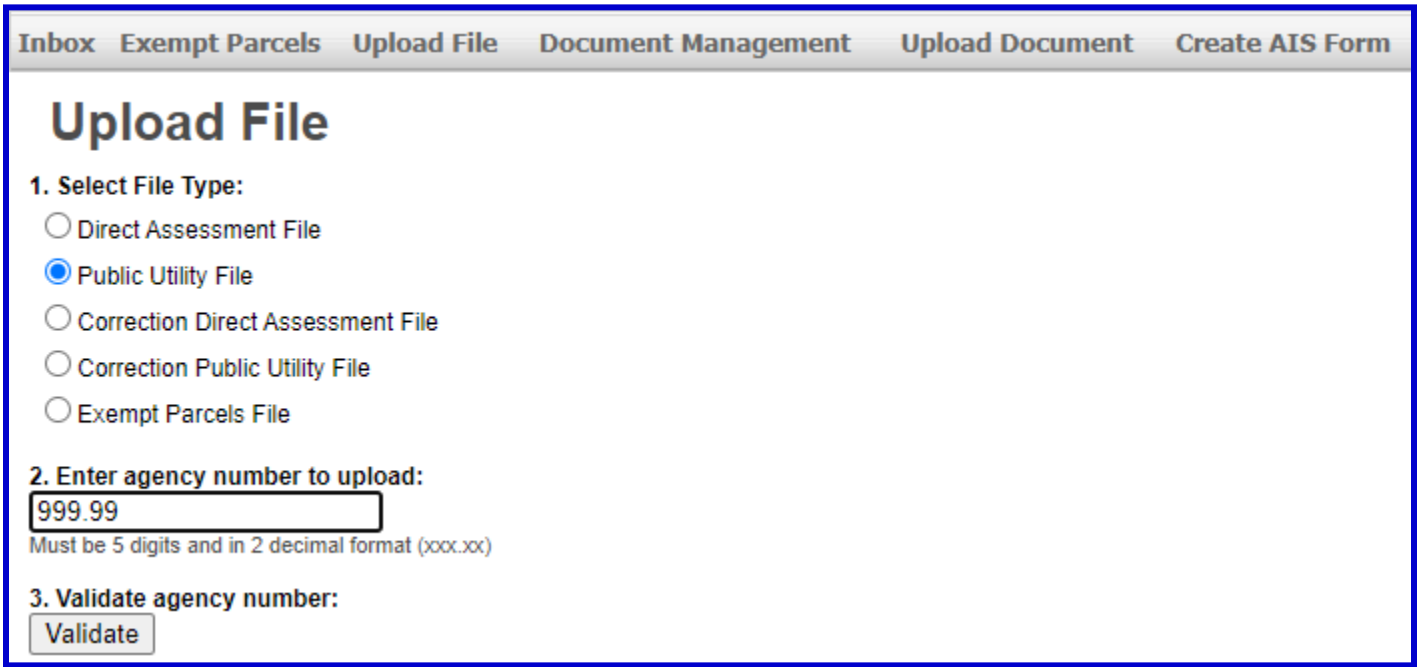
5D. Move the cursor over the white file area to display the file name. If the file name is correct, then click the **Upload** button in step 5.



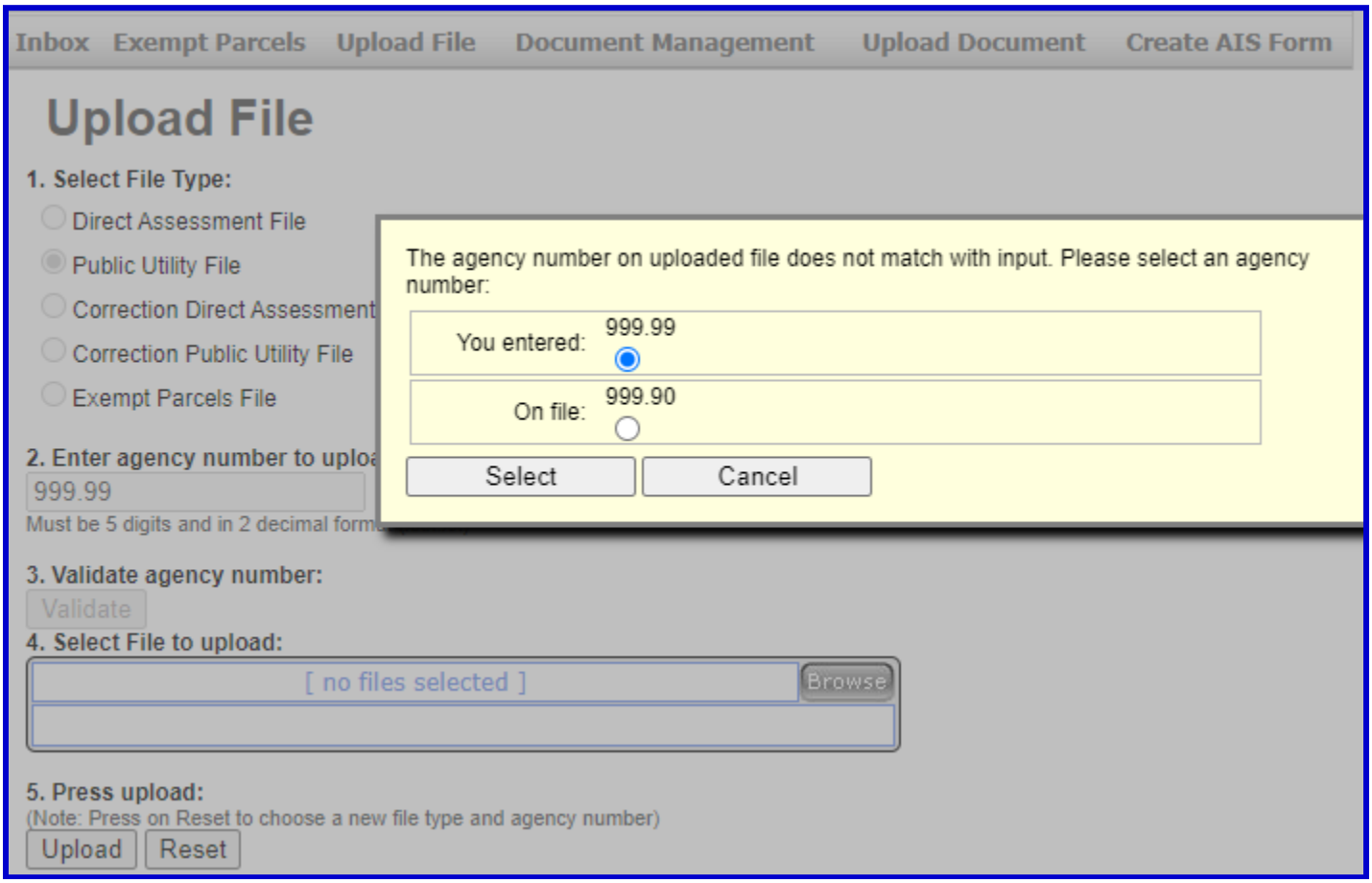
5E. A **message** will pop up under the Upload button after the file loaded successfully. **To load additional file(s), repeat steps 5B to 5E.**



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

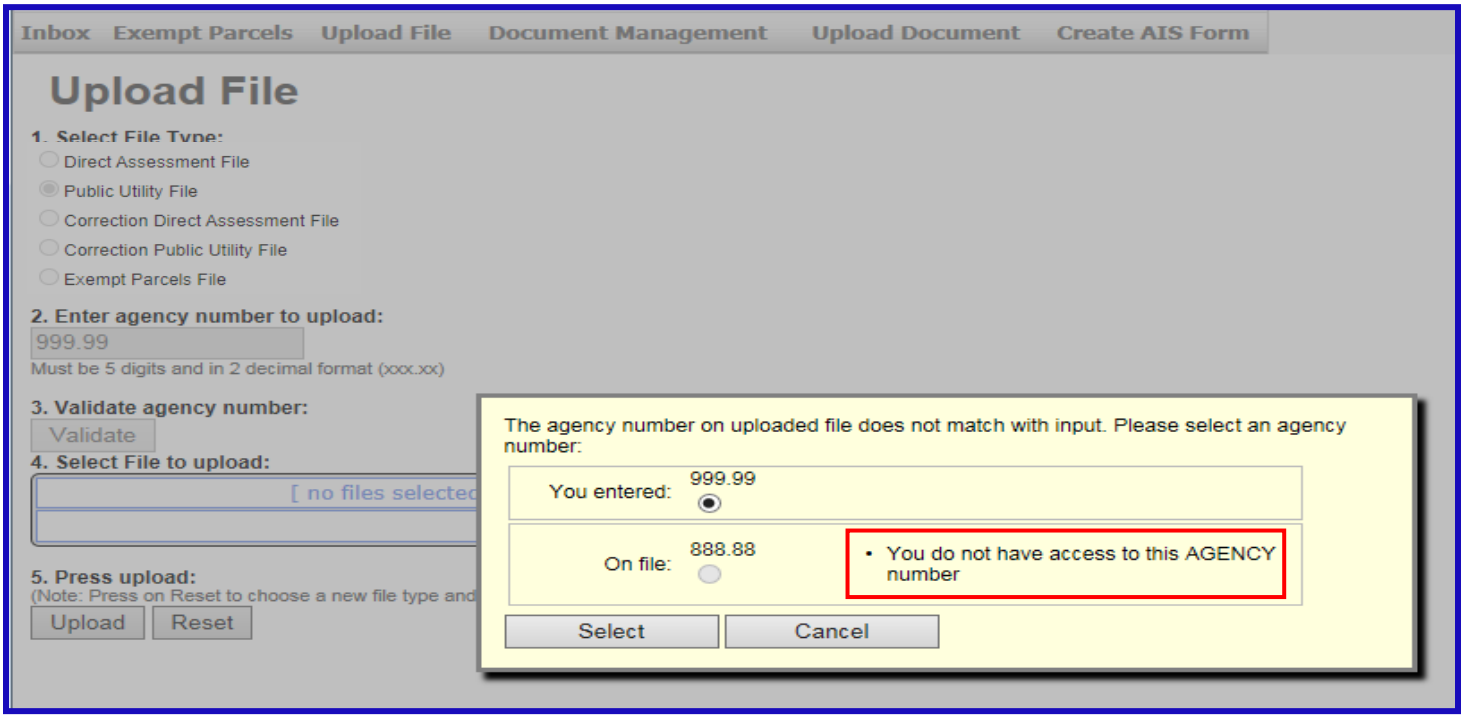


NOTE: If the Agency Number entered on the Upload page **does not match** the Agency Number on the uploaded file, then a pop-up message will ask you to **select the correct Agency Number**.

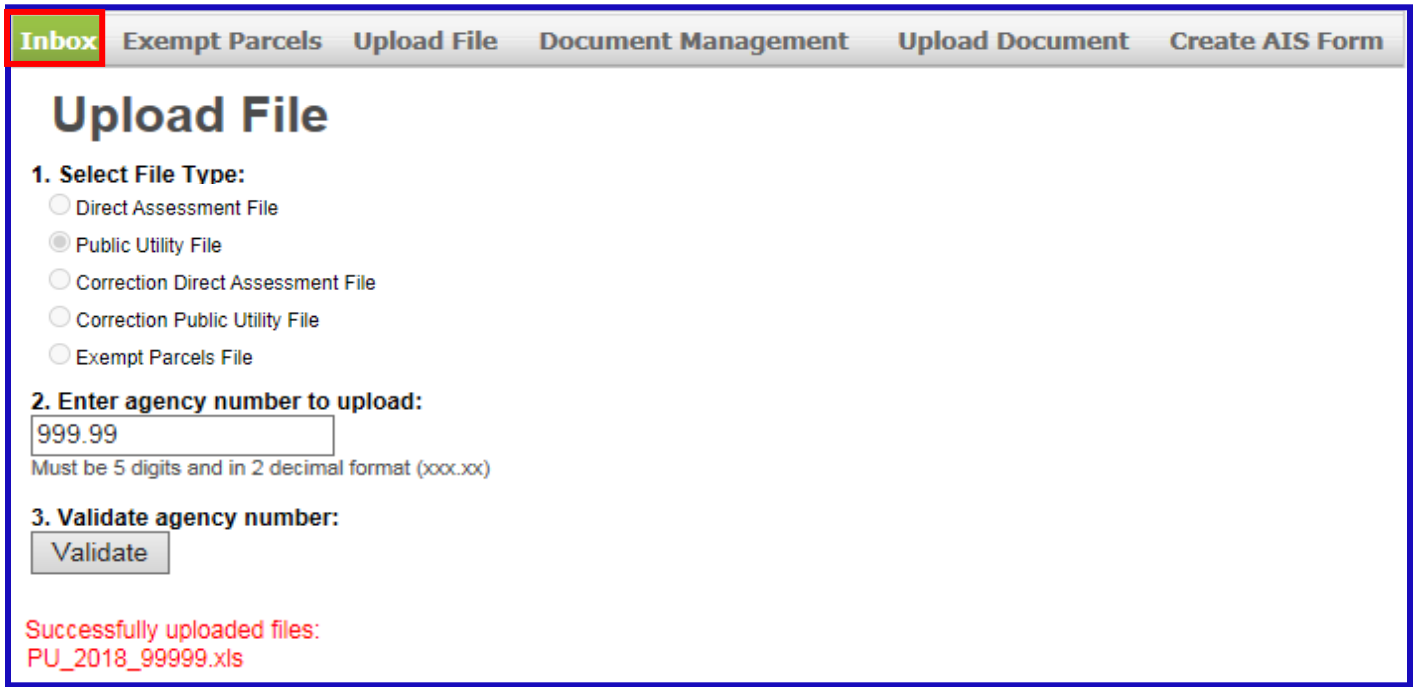


NOTE: If the uploaded file contains an **invalid Agency number** that you do not have access to, **the invalid Agency number cannot be selected** and the pop-up message will state that **'You do not have access to this Agency number'**.

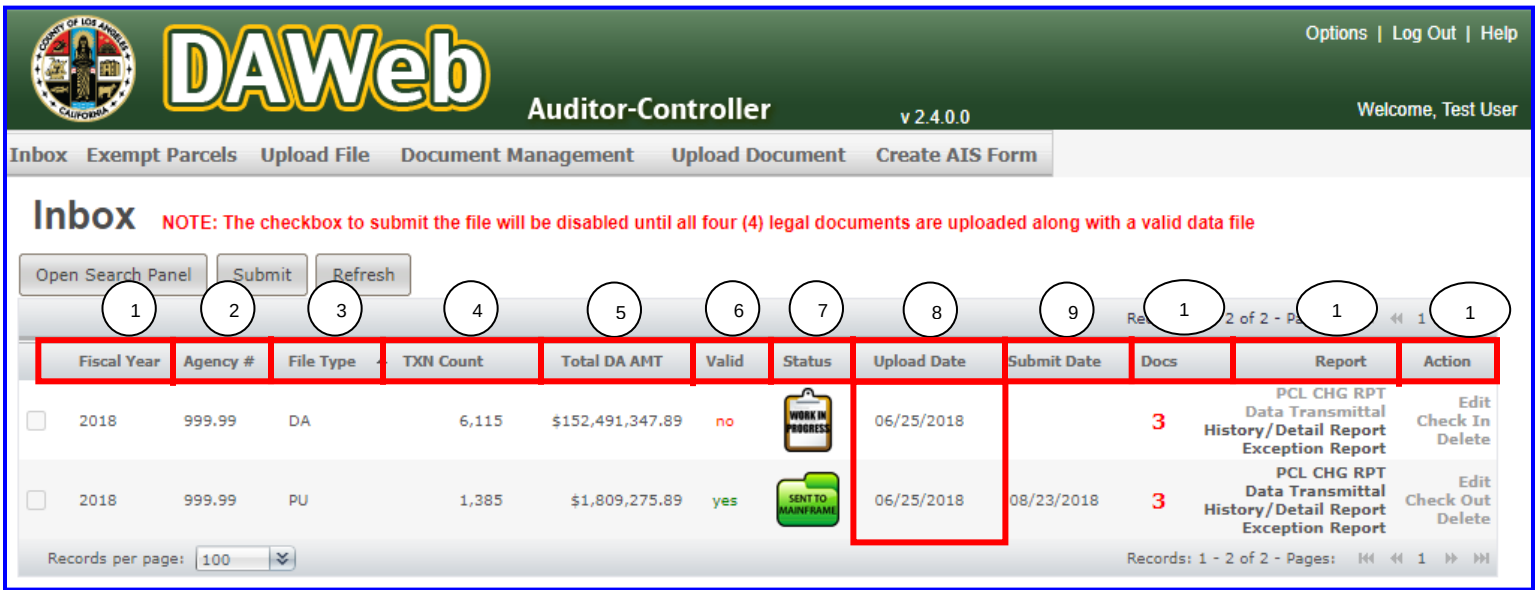
- If both Agency numbers are incorrect, then click **Cancel** and **repeat steps 5B to 5E.**



5G. To view the uploaded file, click the **<u>Inbox</u>** tab.



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

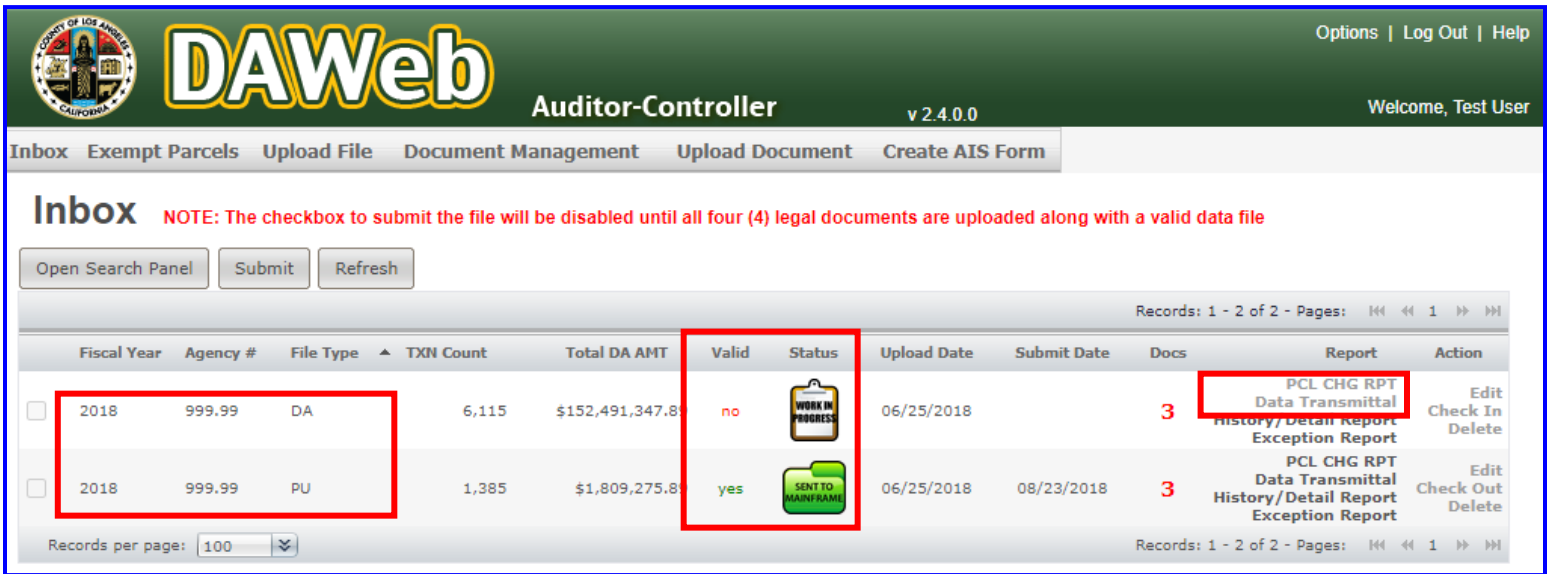


NOTE: Listed below are **descriptions of the Inbox fields**. **Fields #1 to 9 can be sorted by clicking on each column header**. Ascending order sort is indicated by ▲. Click the same field again for descending order sort ▼. The example above is sorted by Upload Date.

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

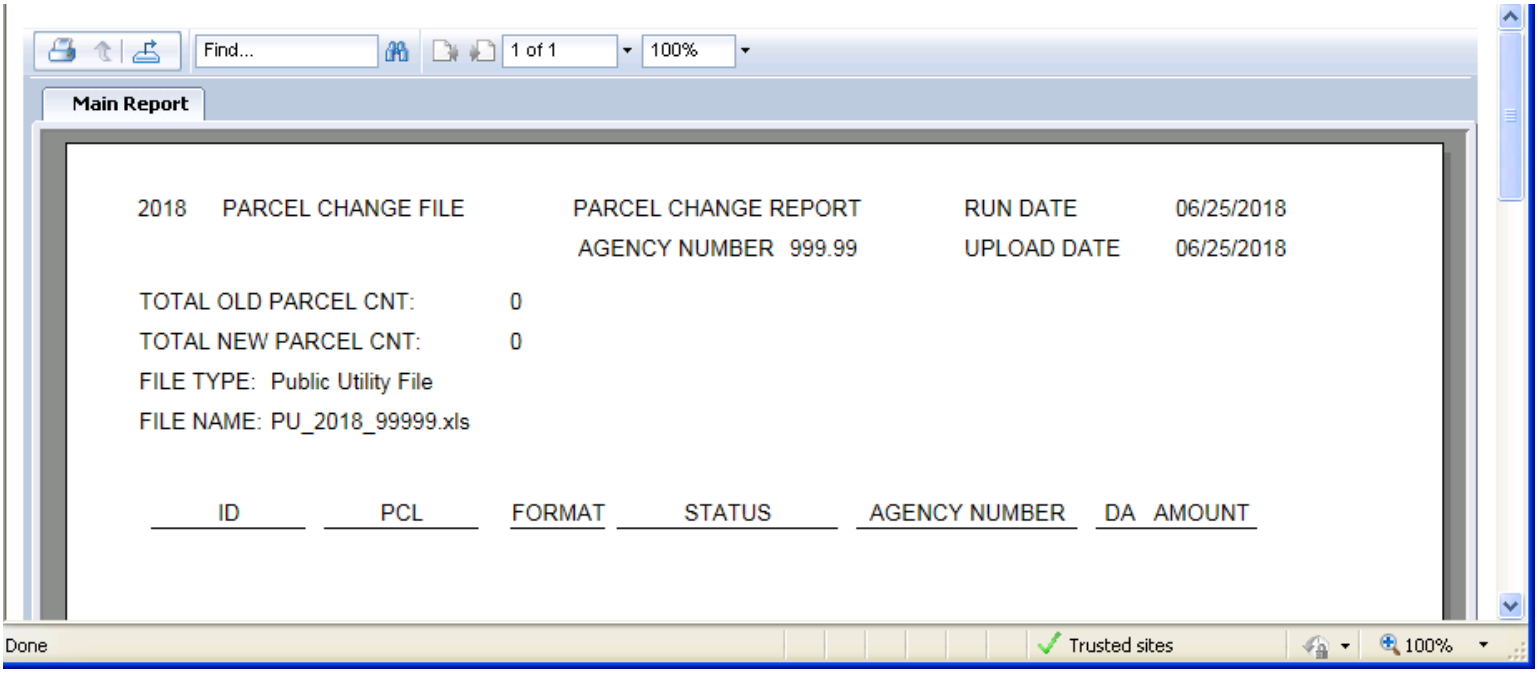
5I. The example shows the Inbox with **Fiscal Year (2018)**, **Agency number (999.99)**, **File Type** (DA and PU) and **Status** (Work in Progress). One file is not valid (Valid = 'no') and one is valid (Valid = 'yes'). **If Valid = 'no'** then proceed to **'<u>Correct the Data File in Edit Mode</u>'**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



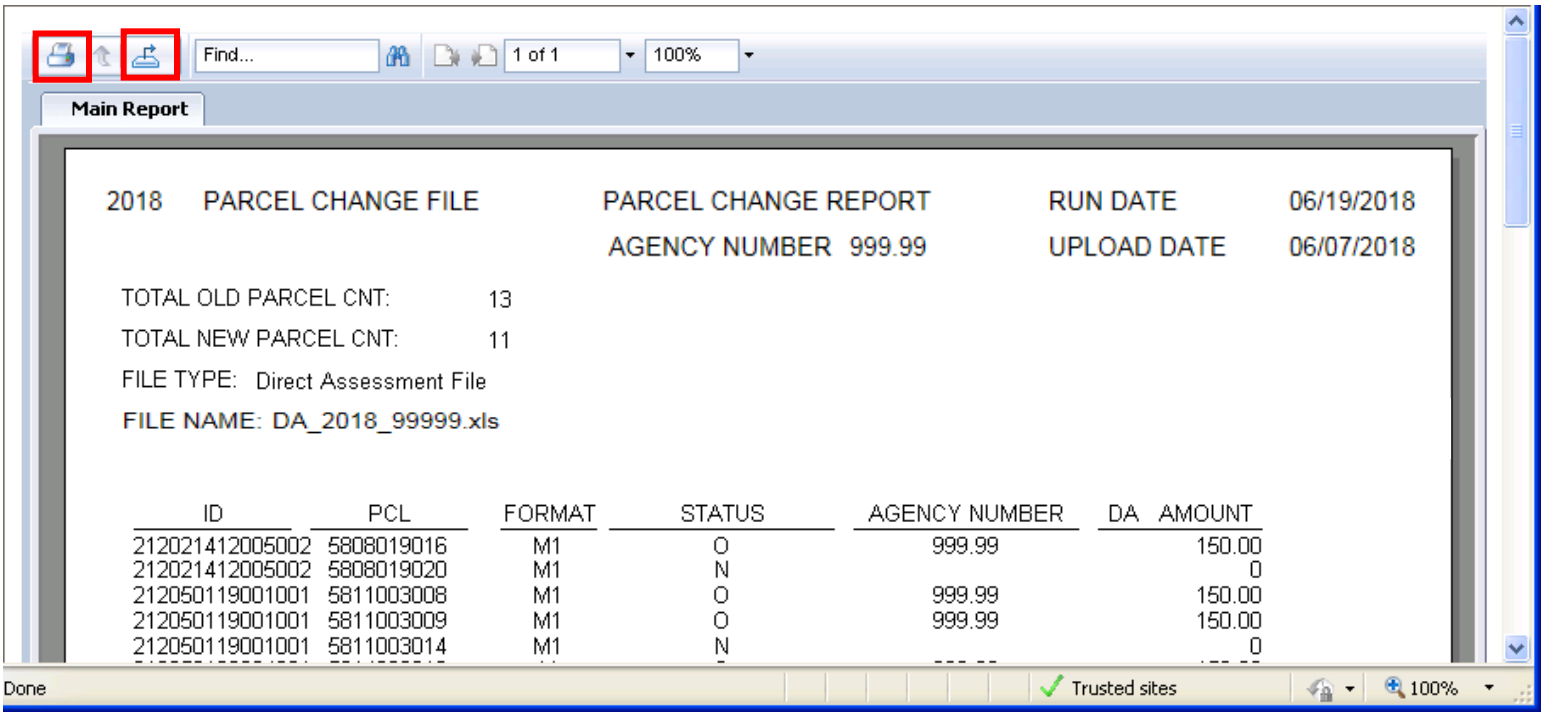
5J. For the **valid** file, click the **<u>PCL CHG RPT</u>** link under the Report column to retrieve the Parcel Change Report. The report can be exported to PDF or Excel.

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:

• Delete the current file from the Inbox and upload new file with parcel changes included in the file	Go to **'Create the Excel File Input' (P.33)** OR **Create the Text File Input' (P. 42)**
• Add new parcels and delete old parcels in Edit mode	Go to **'Correct a File in Edit Mode' (P. 66)**
• Complete Upload Original DA file process AND • Submit parcel changes as corrections	Go to **'Upload Correction File and Correction Data Transmittal' (P.100)**

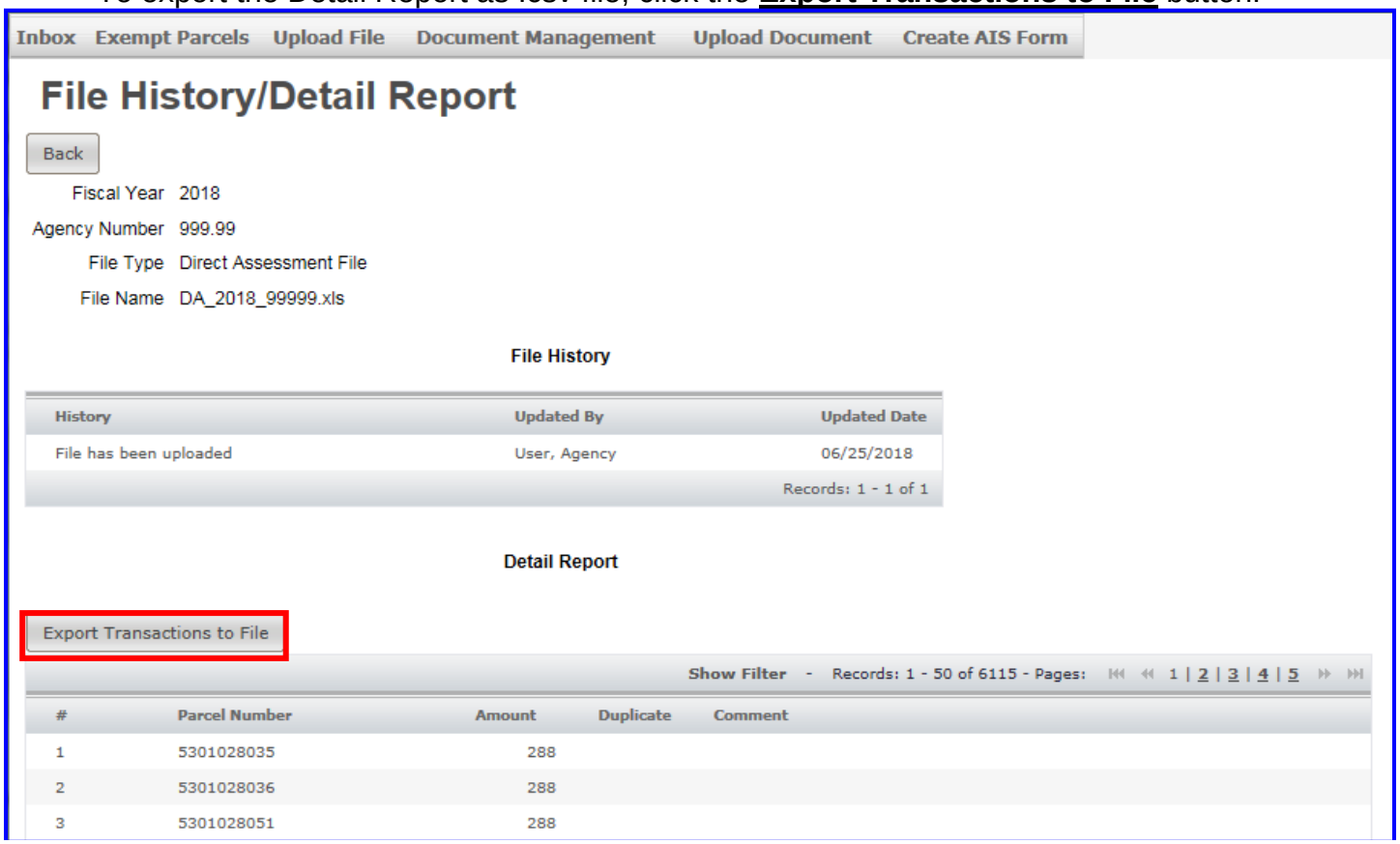


5L. Click the **History/Detail Report** link under the **Report** column to see the parcel and amount detail in the uploaded file. **The Detail Report can be exported as .csv file for accounts with 150,000 transactions or less.**

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

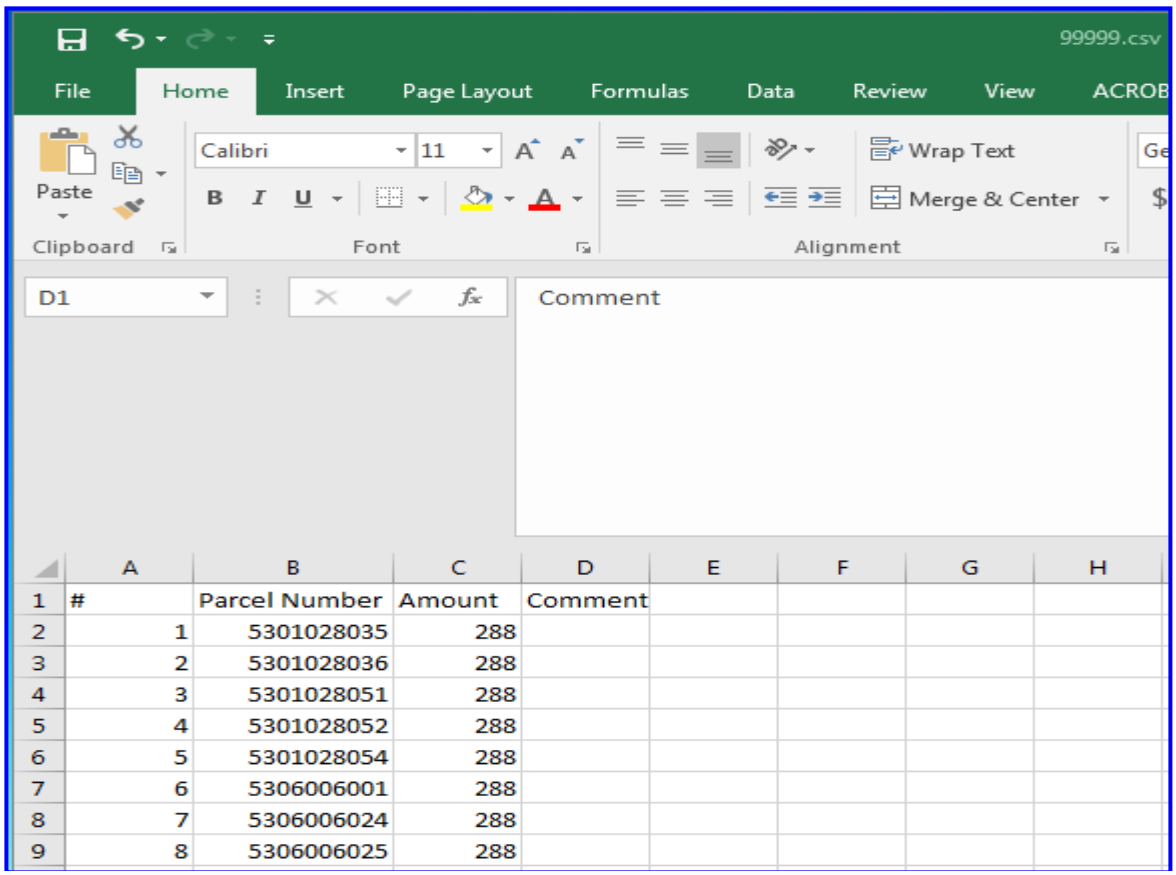
5M. The **File History** tracks and logs the status of the file as it goes through the Direct Assessment process. The **Detail Report** is a copy of the file uploaded by the agency. The **Comment** column displays error messages for parcel numbers and/or amounts that are incorrectly formatted.

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



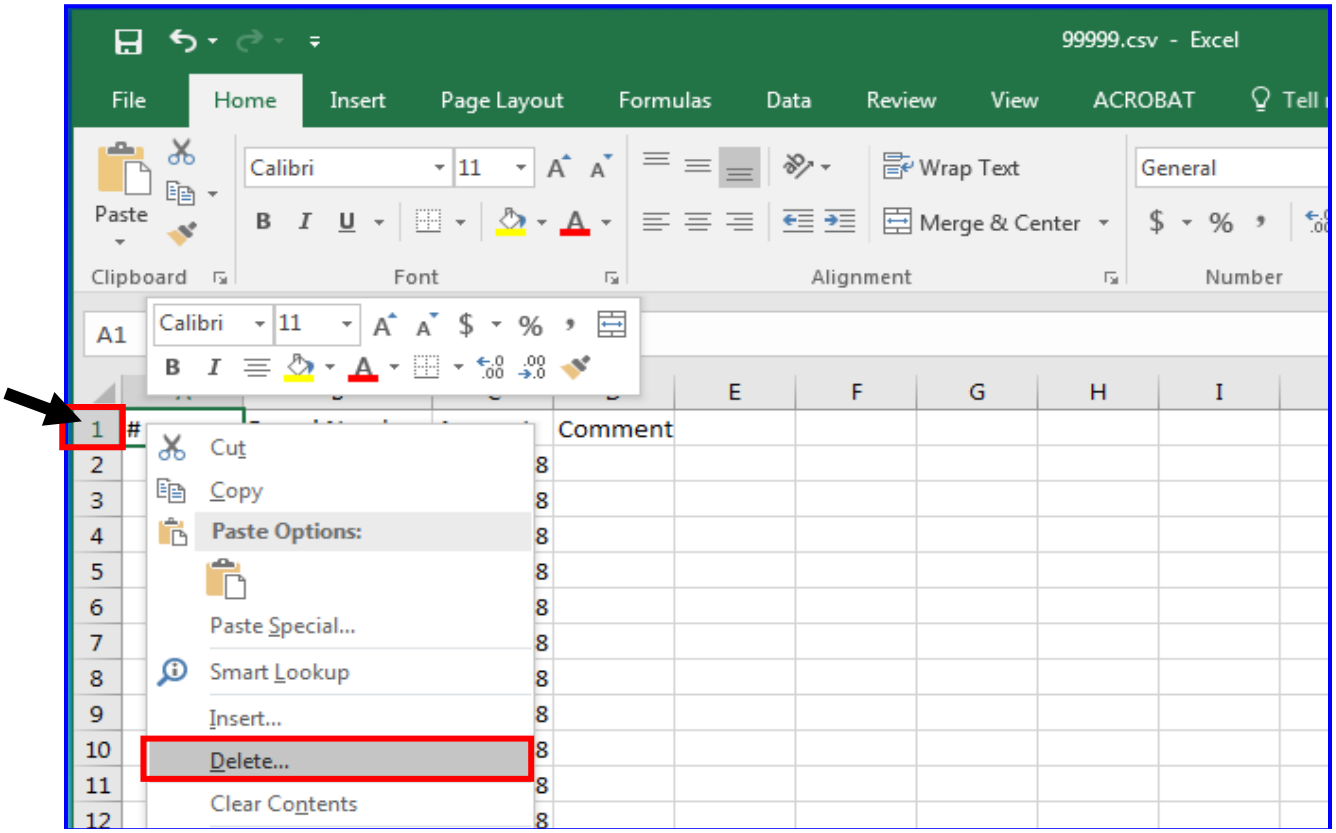
5N. The file will automatically download. Click the **Open file** button in the web browser Downloads folder to view the file.

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

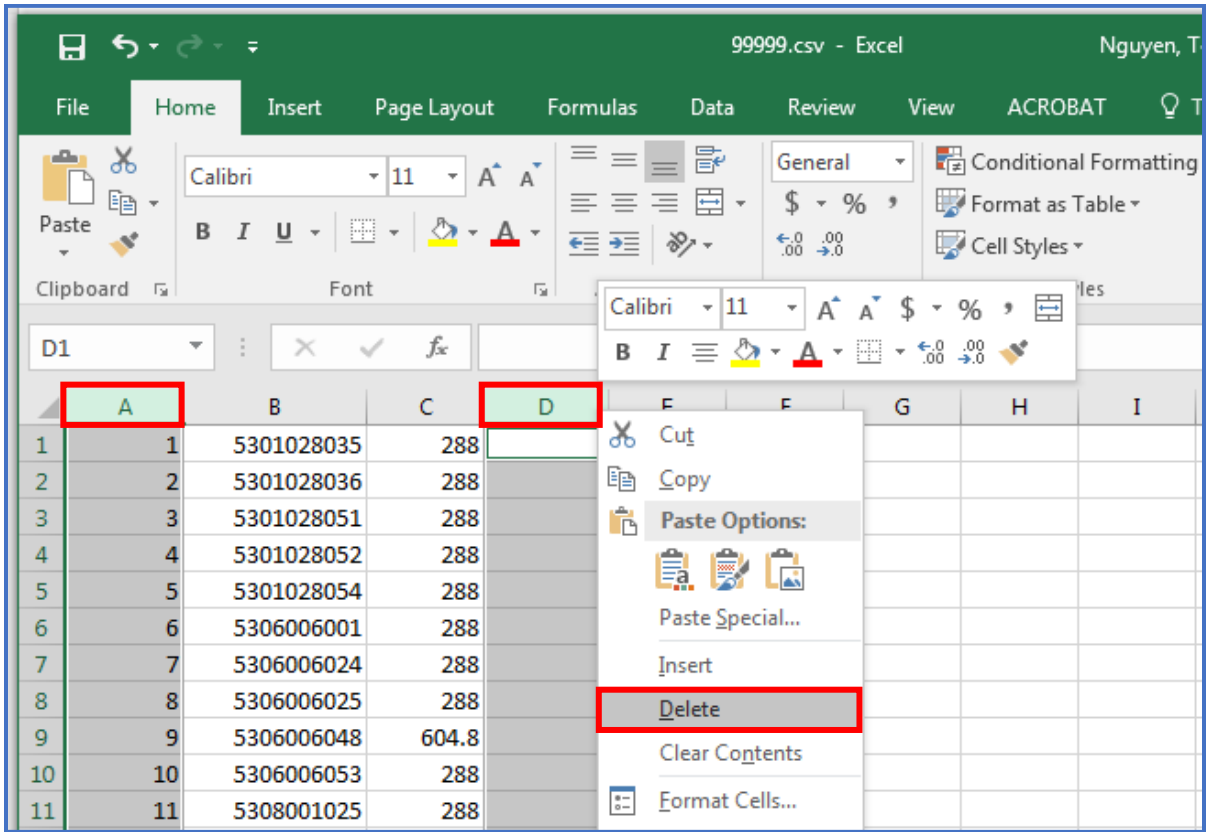


	A	B	C	D	E	F	G	H
1	#	Parcel Number	Amount	Comment				
2	1	5301028035	288					
3	2	5301028036	288					
4	3	5301028051	288					
5	4	5301028052	288					
6	5	5301028054	288					
7	6	5306006001	288					
8	7	5306006024	288					
9	8	5306006025	288					

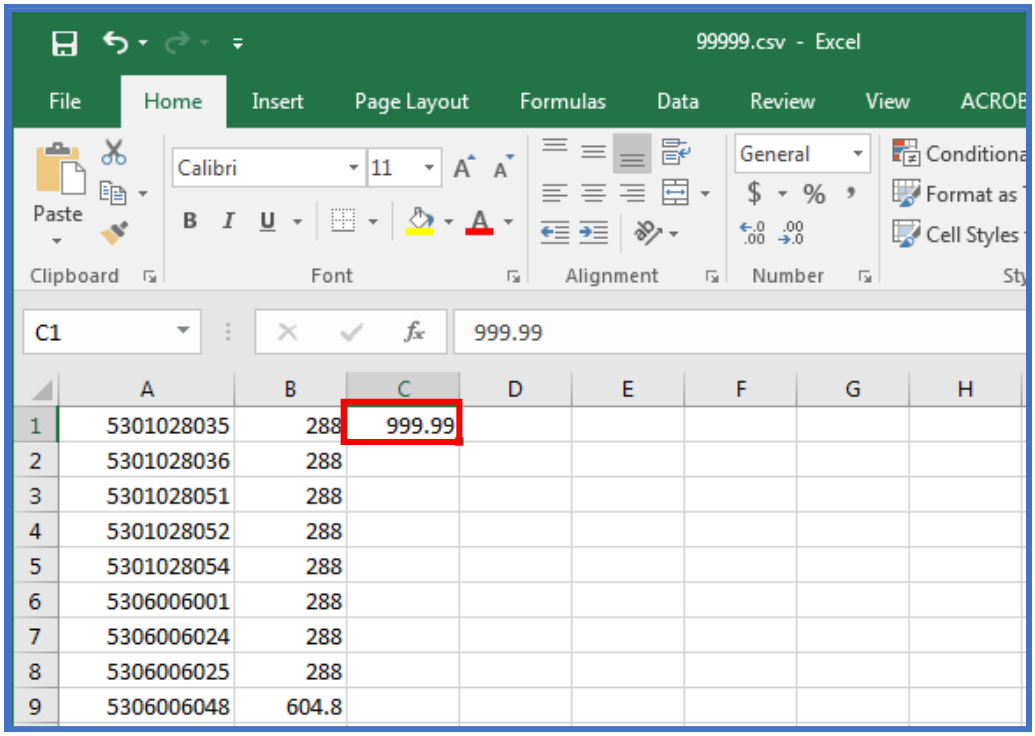
5P. To delete the heading row, right click on row '1' and select **Delete** from the pop-up window.



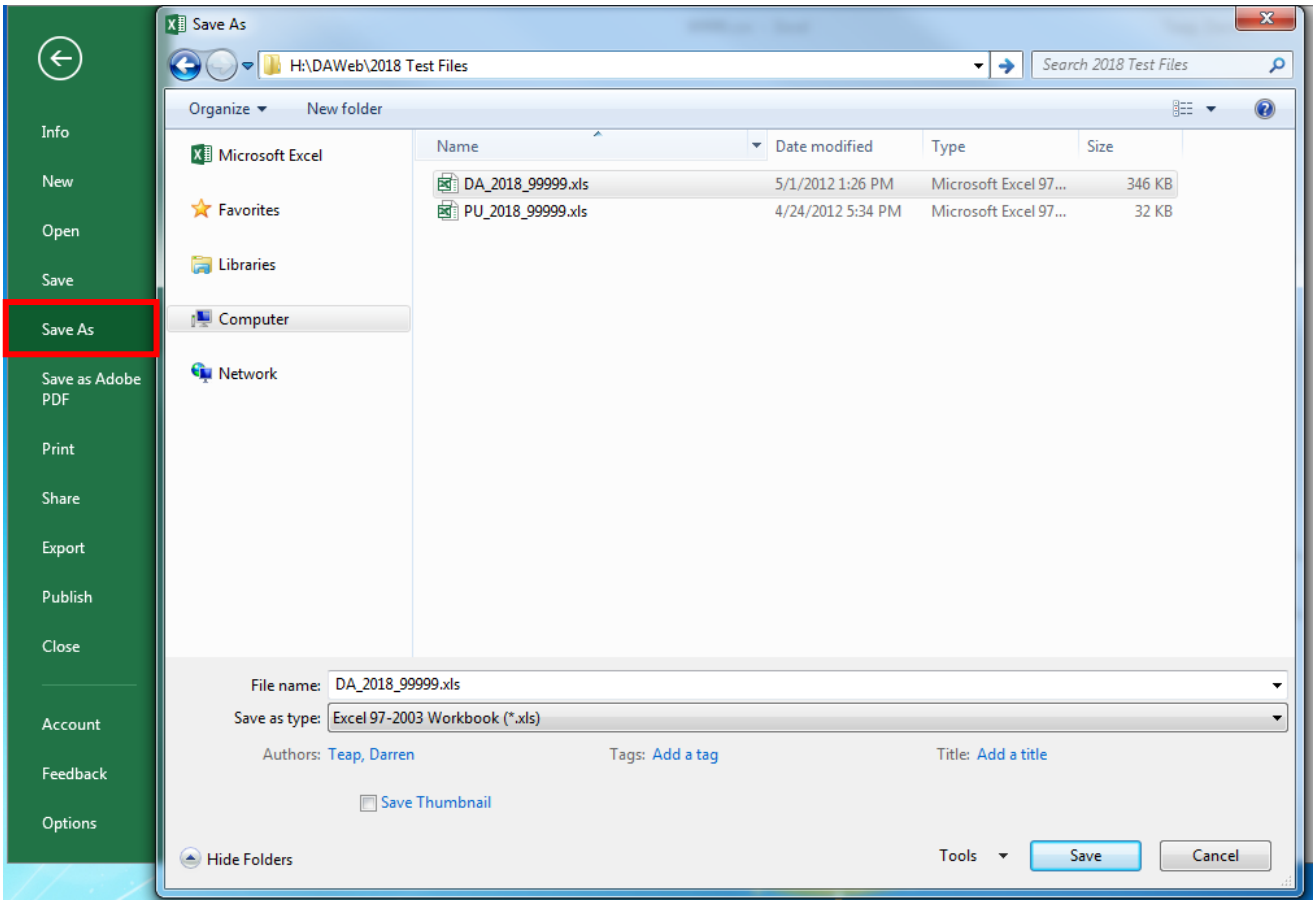
5Q. To delete the Line number and Comment columns, right click on columns 'A' and 'D' and select **Delete** from the pop-up window.



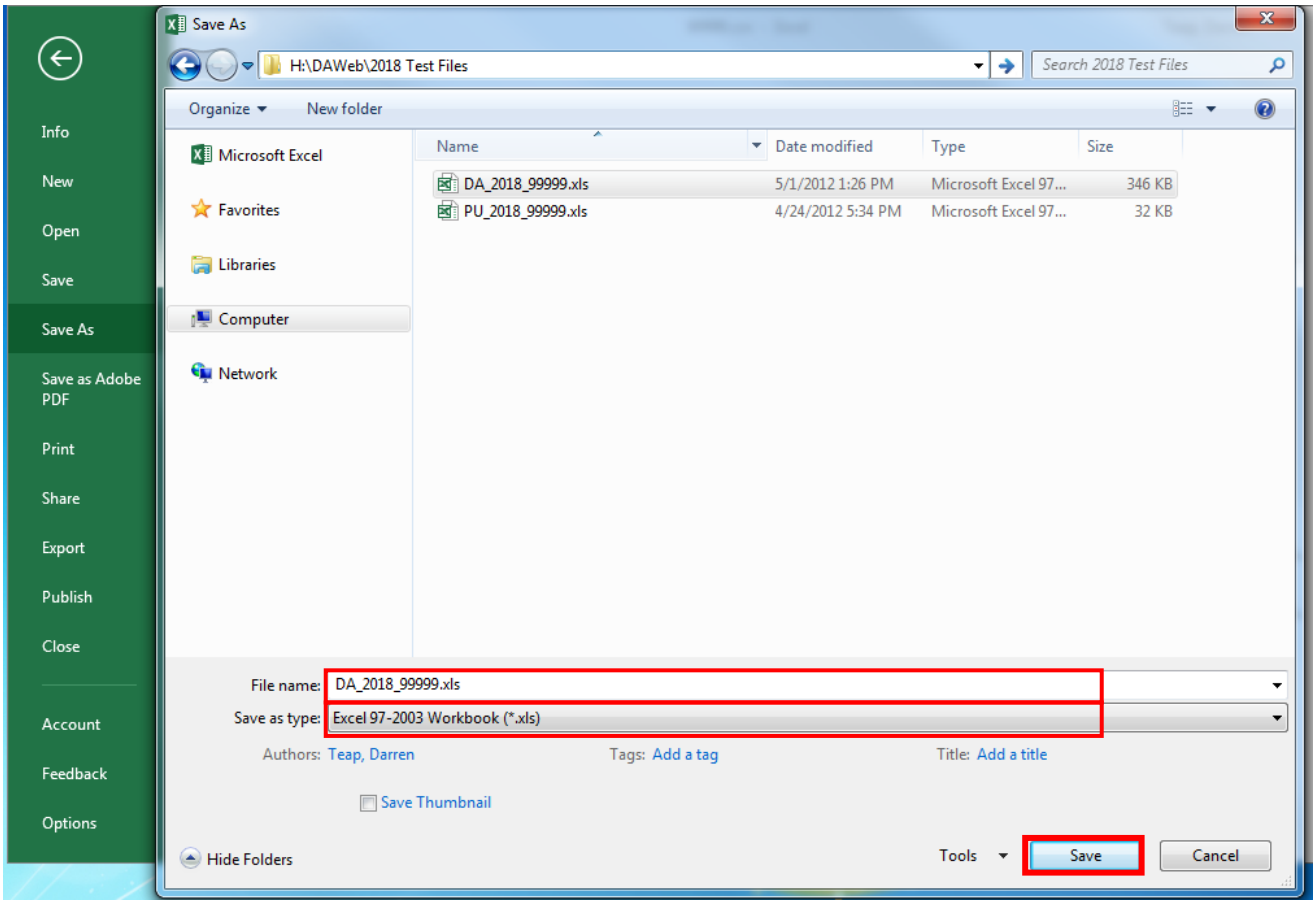
5R. Enter the agency number in cell '**C1**'.
NOTE: Format cell C1 to Text format if your account number contains leading and/or ending zeros.



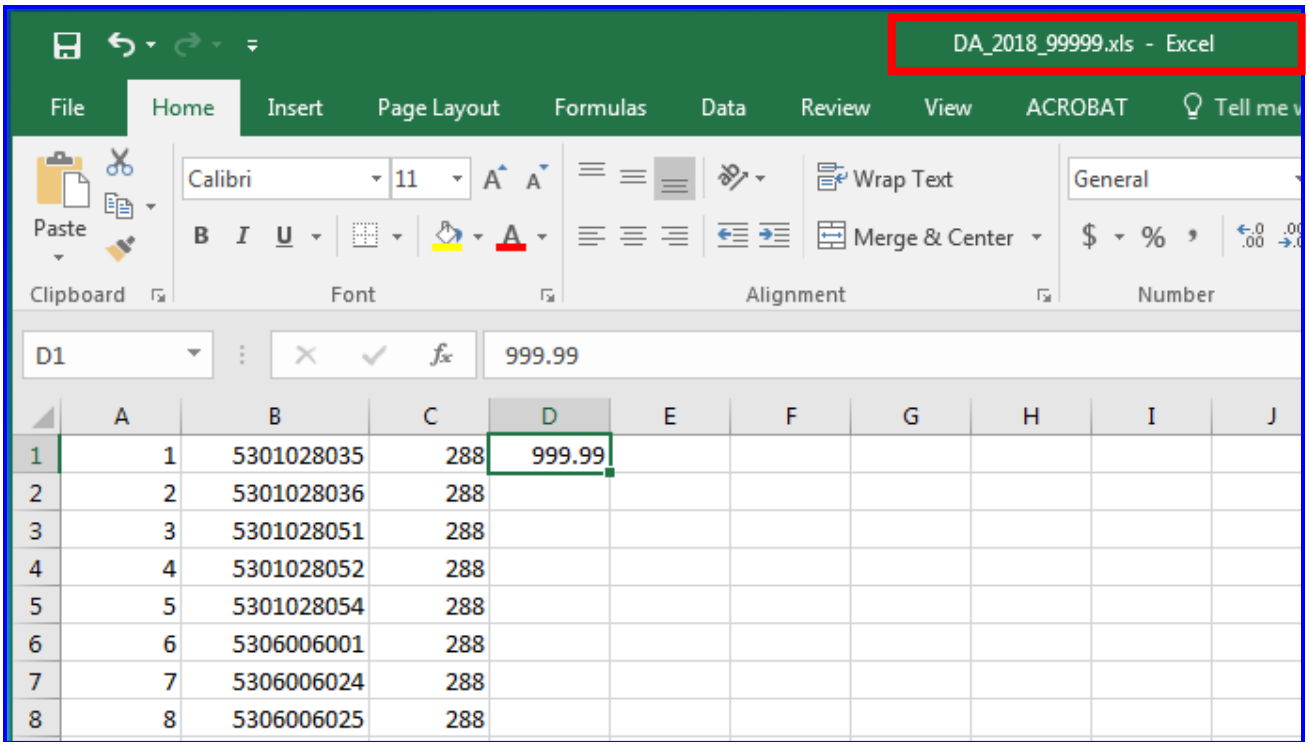
5S. From the menu bar, select **File**, **<u>Save As</u>.**



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**.

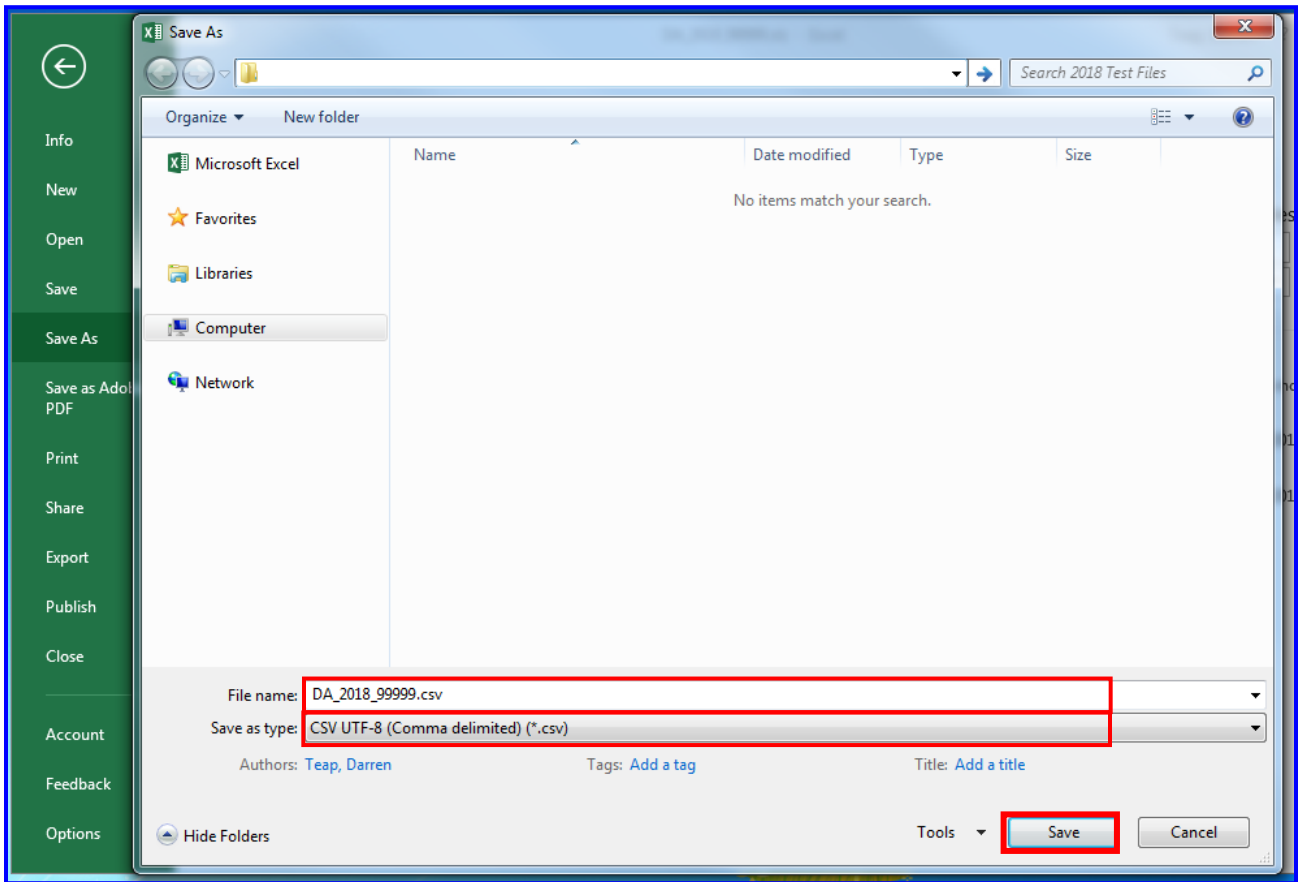


5U. The Detail file extension has been updated to **.xls** in the example below.

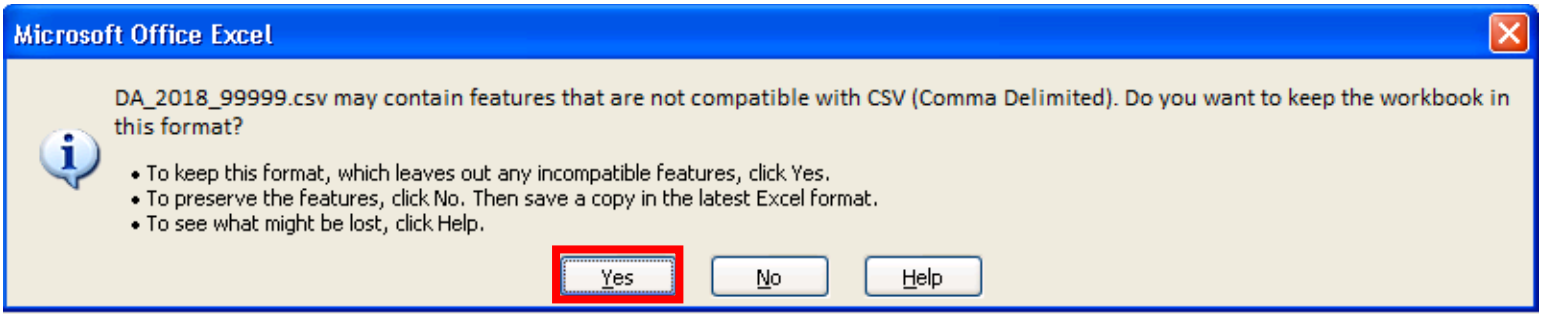


	A	B	C	D	E	F	G	H	I	J
1	1	5301028035	288	999.99						
2	2	5301028036	288							
3	3	5301028051	288							
4	4	5301028052	288							
5	5	5301028054	288							
6	6	5306006001	288							
7	7	5306006024	288							
8	8	5306006025	288							

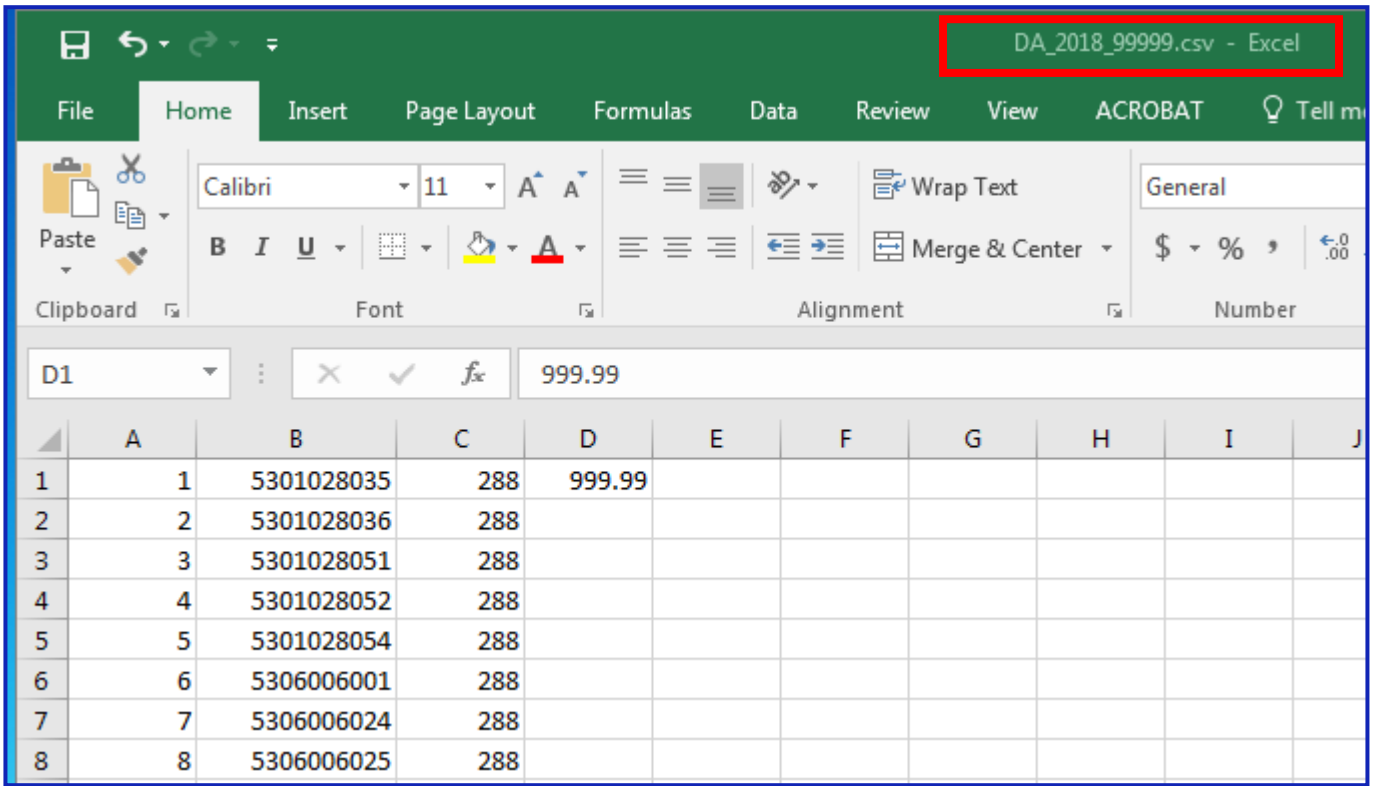
5V. To save as Text file, choose a location where you want to save the file, rename the file, select **CSV (Comma delimited)(*.csv)** in the '**Save as type'** drop-down box and click the **Save** button.



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

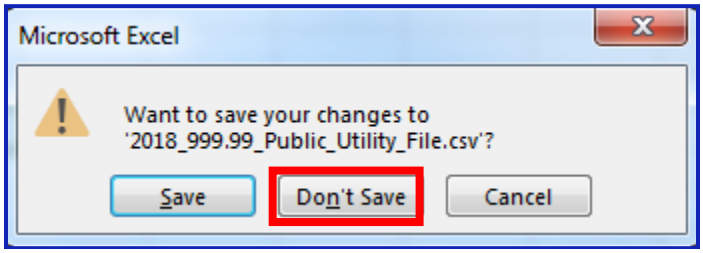


5X. The Detail file extension has been updated to **.csv** in the example below. Click the 'X' to close the application.

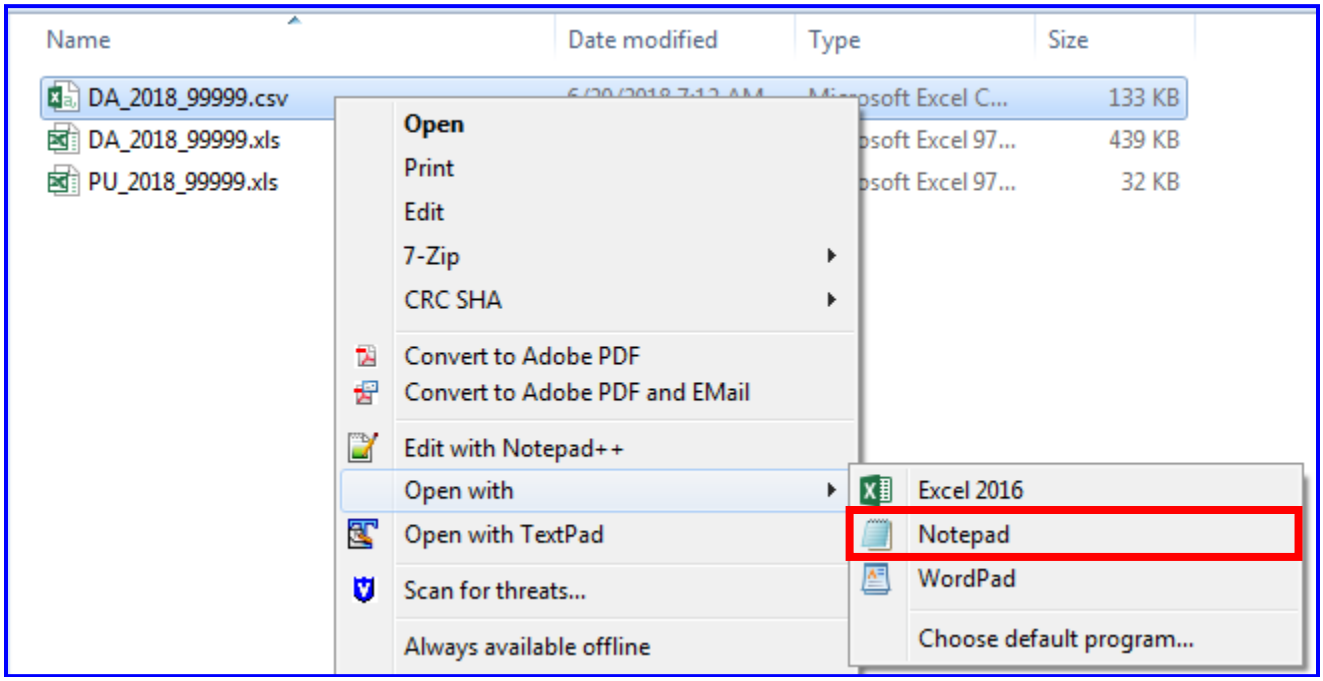


	A	B	C	D
1	1	5301028035	288	999.99
2	2	5301028036	288	
3	3	5301028051	288	
4	4	5301028052	288	
5	5	5301028054	288	
6	6	5306006001	288	
7	7	5306006024	288	
8	8	5306006025	288	

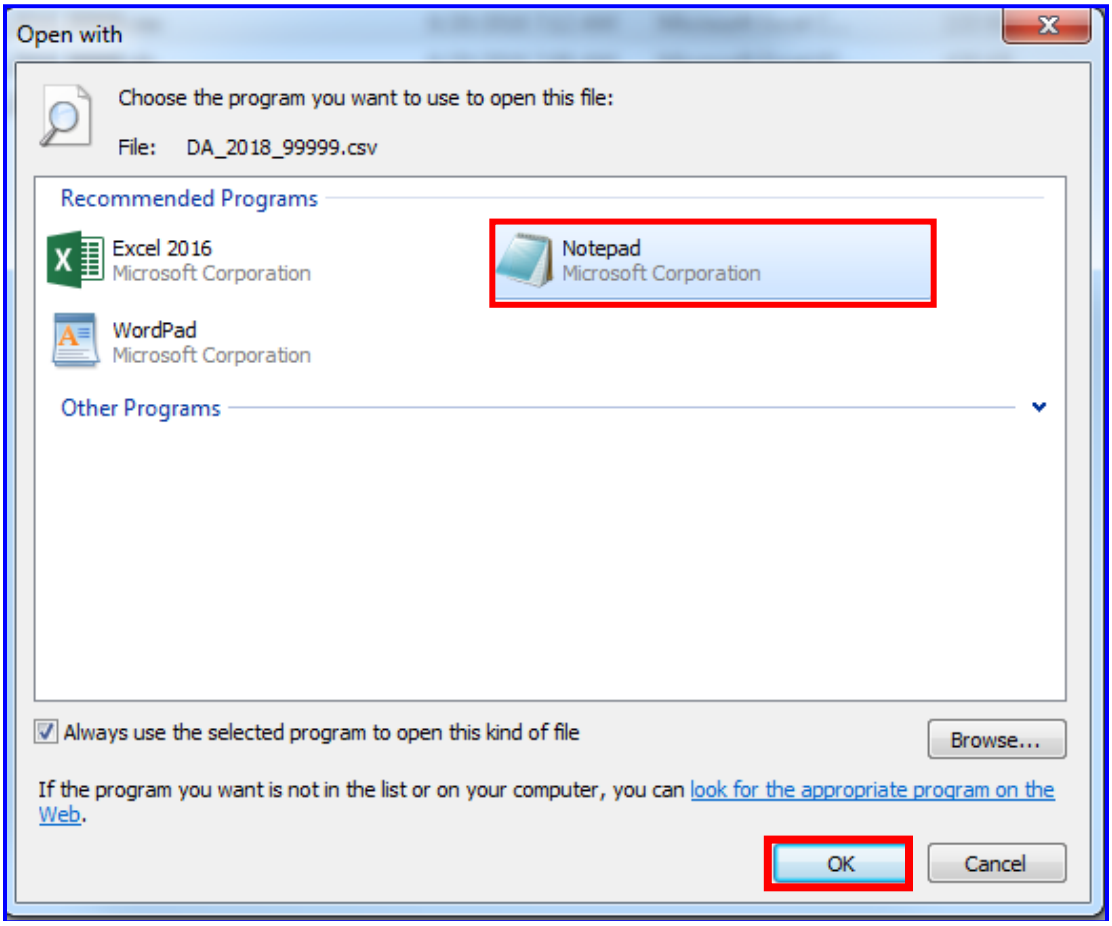
5Y. Click the **NO** button when the pop-up message appears.



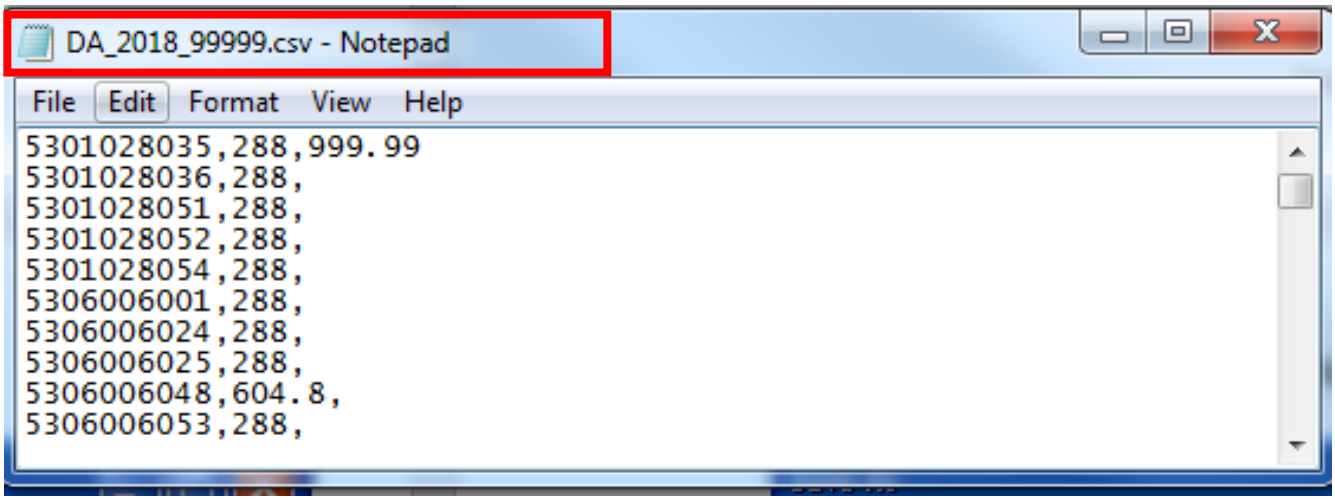
5Z. Locate the folder where you saved the .csv file, right click on the file and select **Open With, Choose Program…**



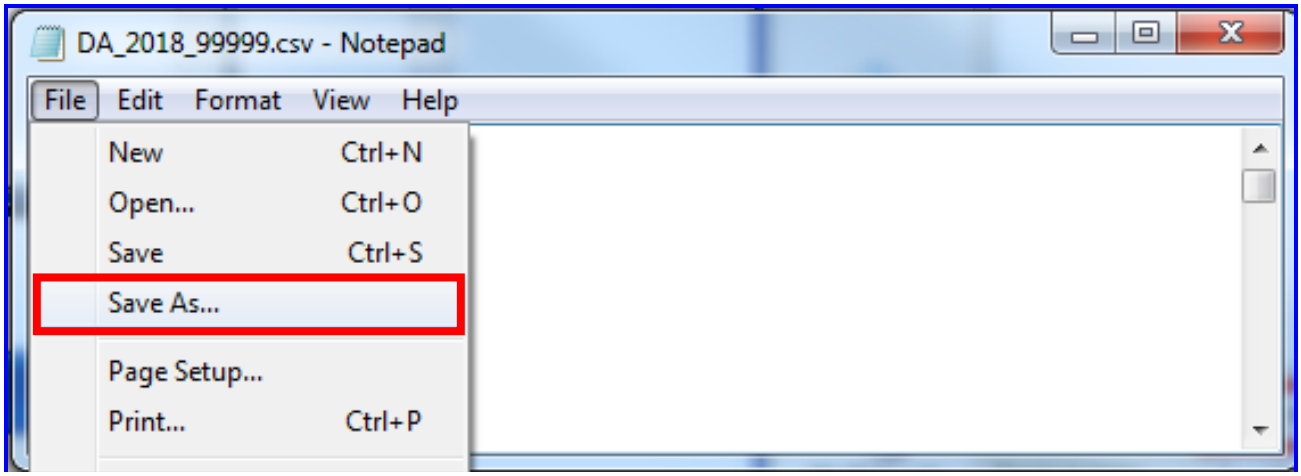
5AA. Select **Notepad** and click the **OK** button.



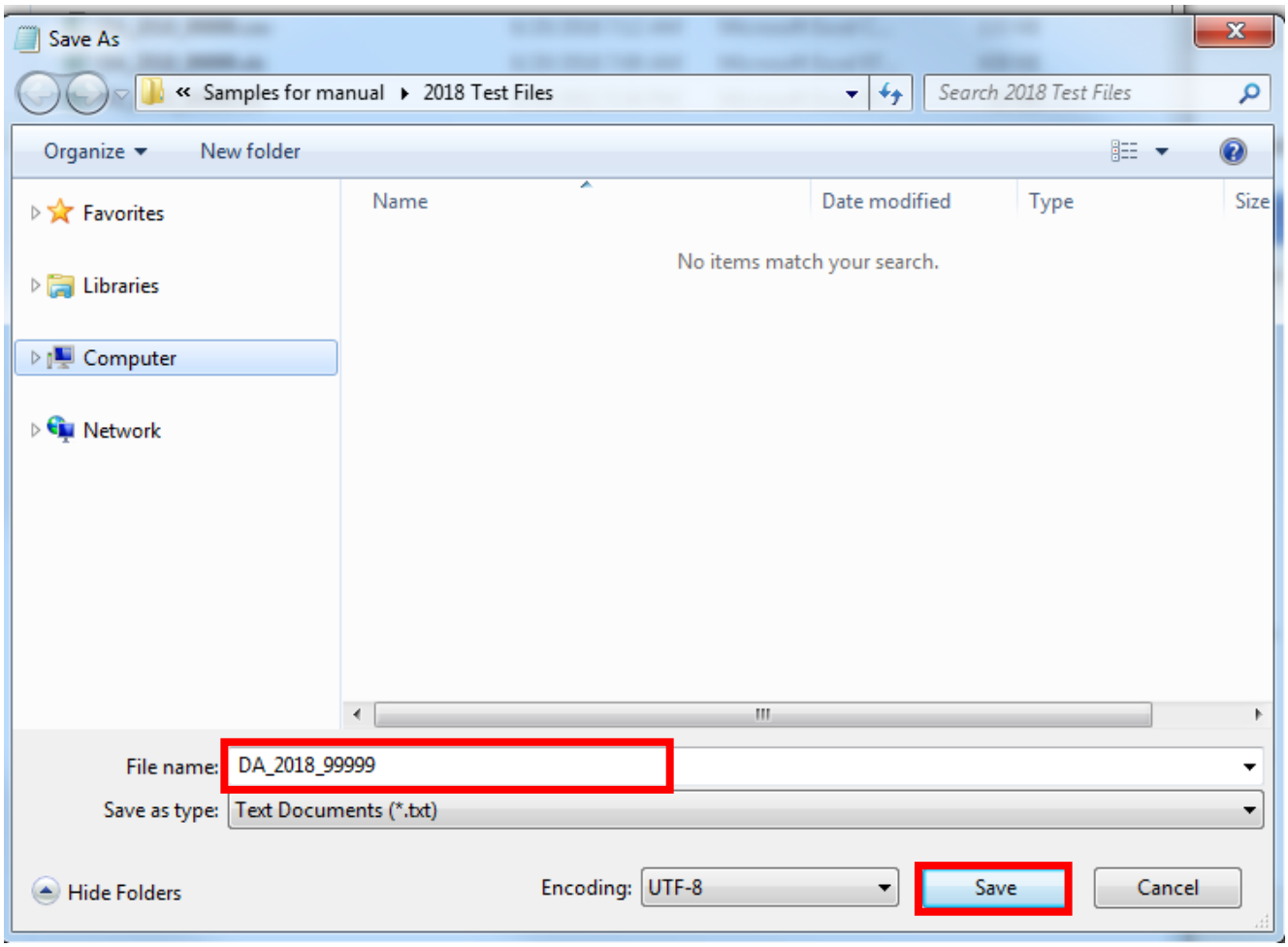
5BB. The .csv file will open in **Notepad**.



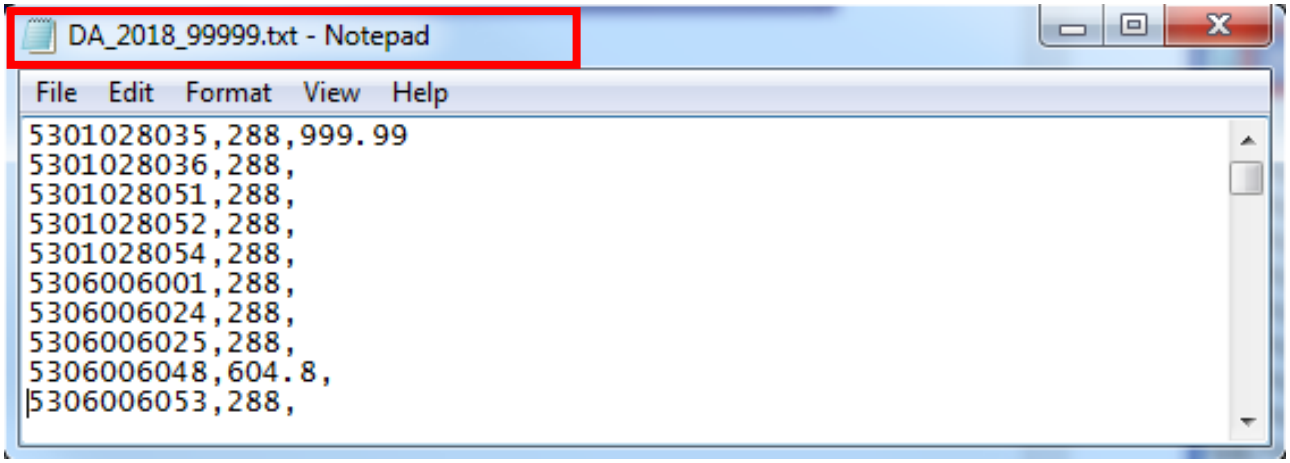
5CC. To save as .txt file, click **File, Save As…**



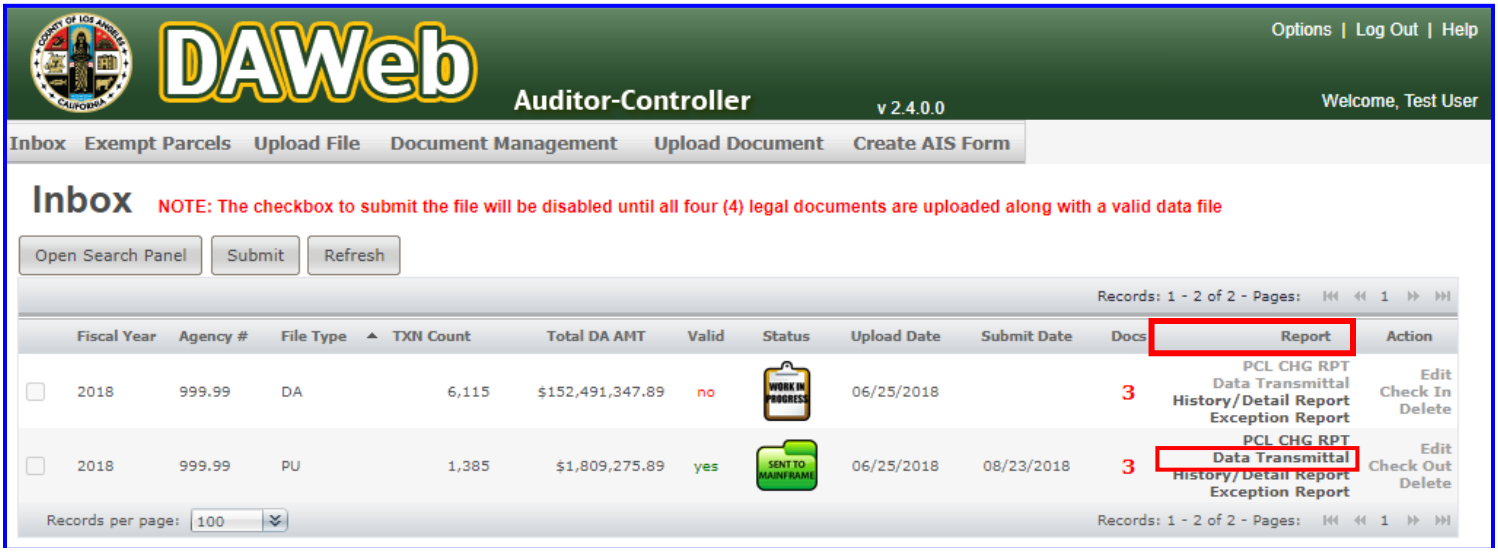
5DD. **Delete** the .csv extension from the File Name and click the **Save** button.



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.



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

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: _____

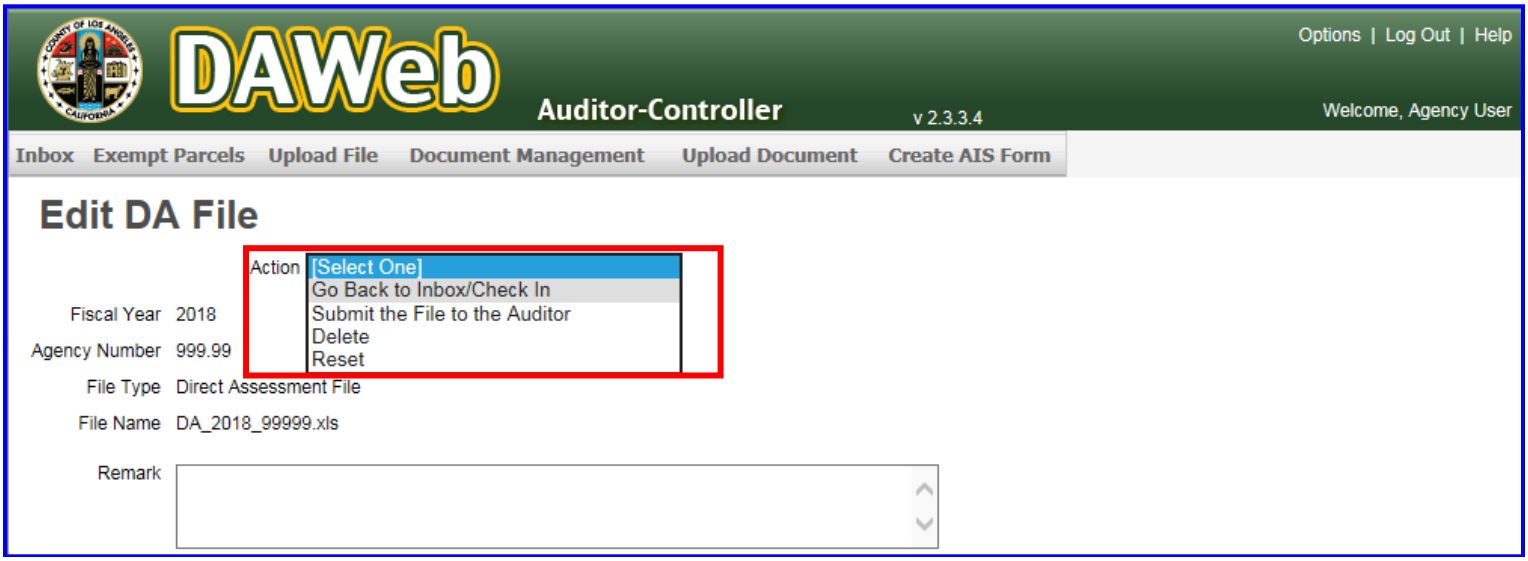
NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file.

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

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.

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

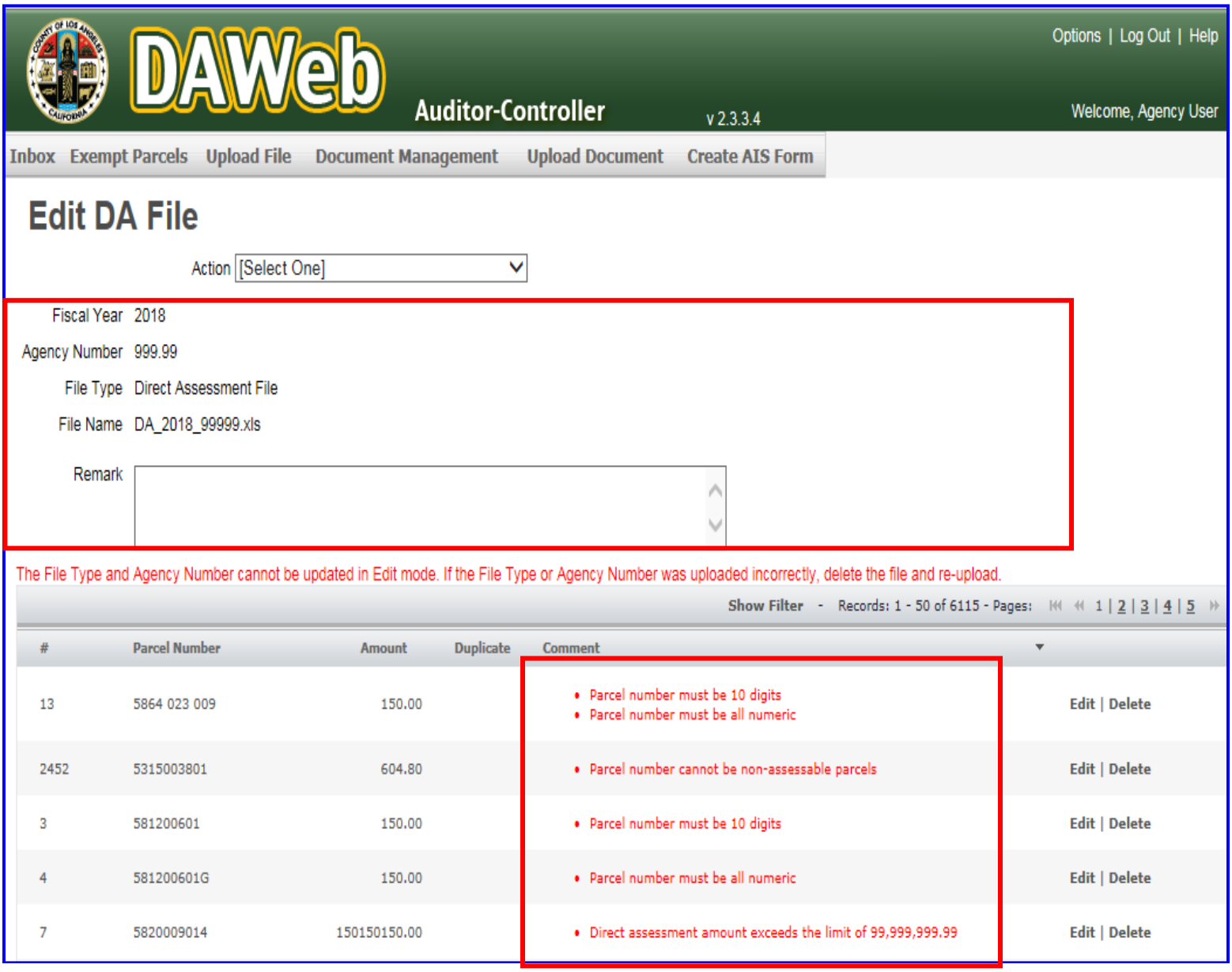


NOTE: The following options are listed under the **Action drop-down box**:

Go Back to Inbox/Check In	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.
Submit the File to the Auditor	Submits the agency file to the Auditor for review.
Delete	Deletes the agency file.
Reset	Resets changes on File type and Agency Number (must be done before clicking on the **Update** 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**.



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

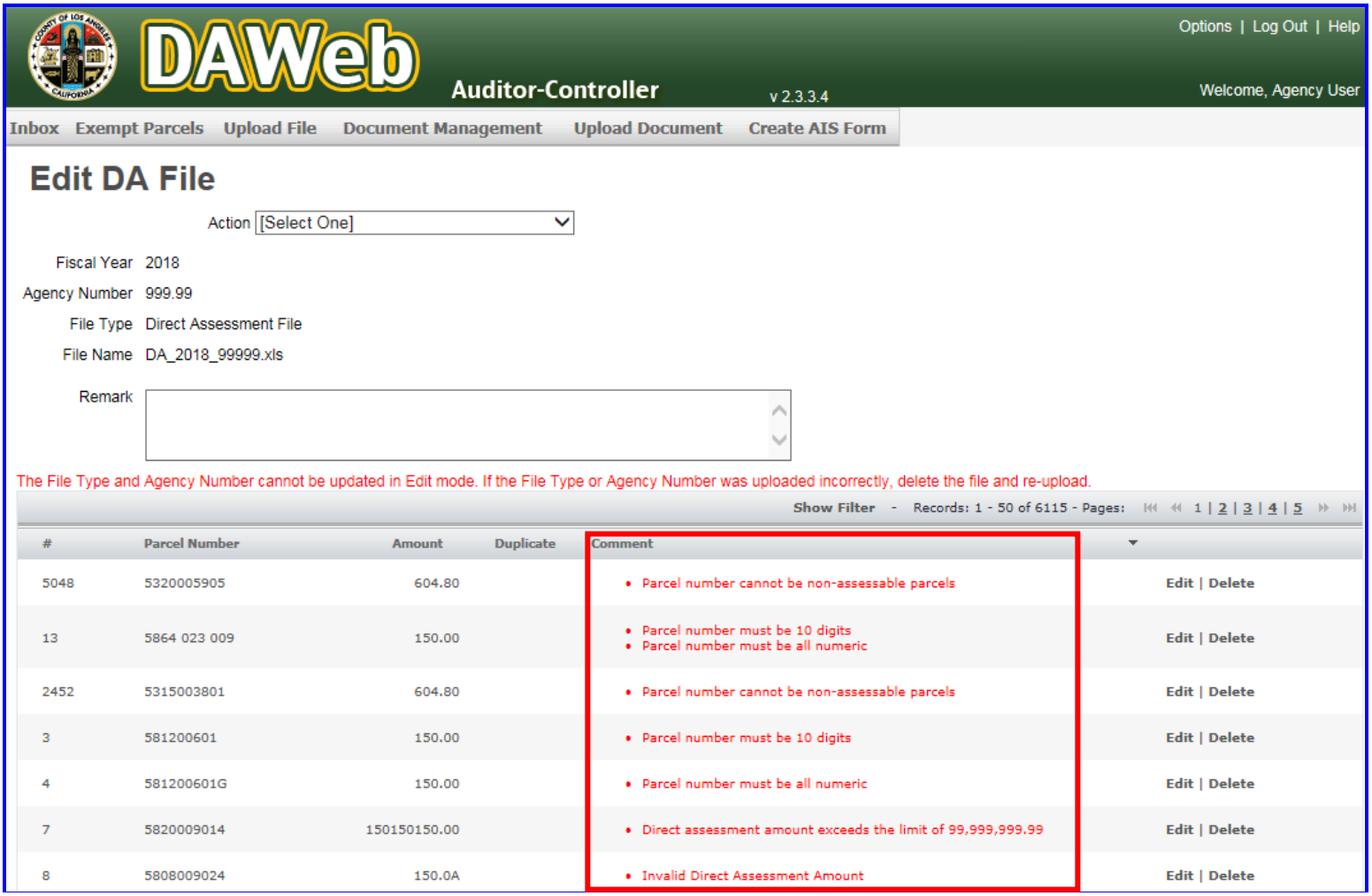
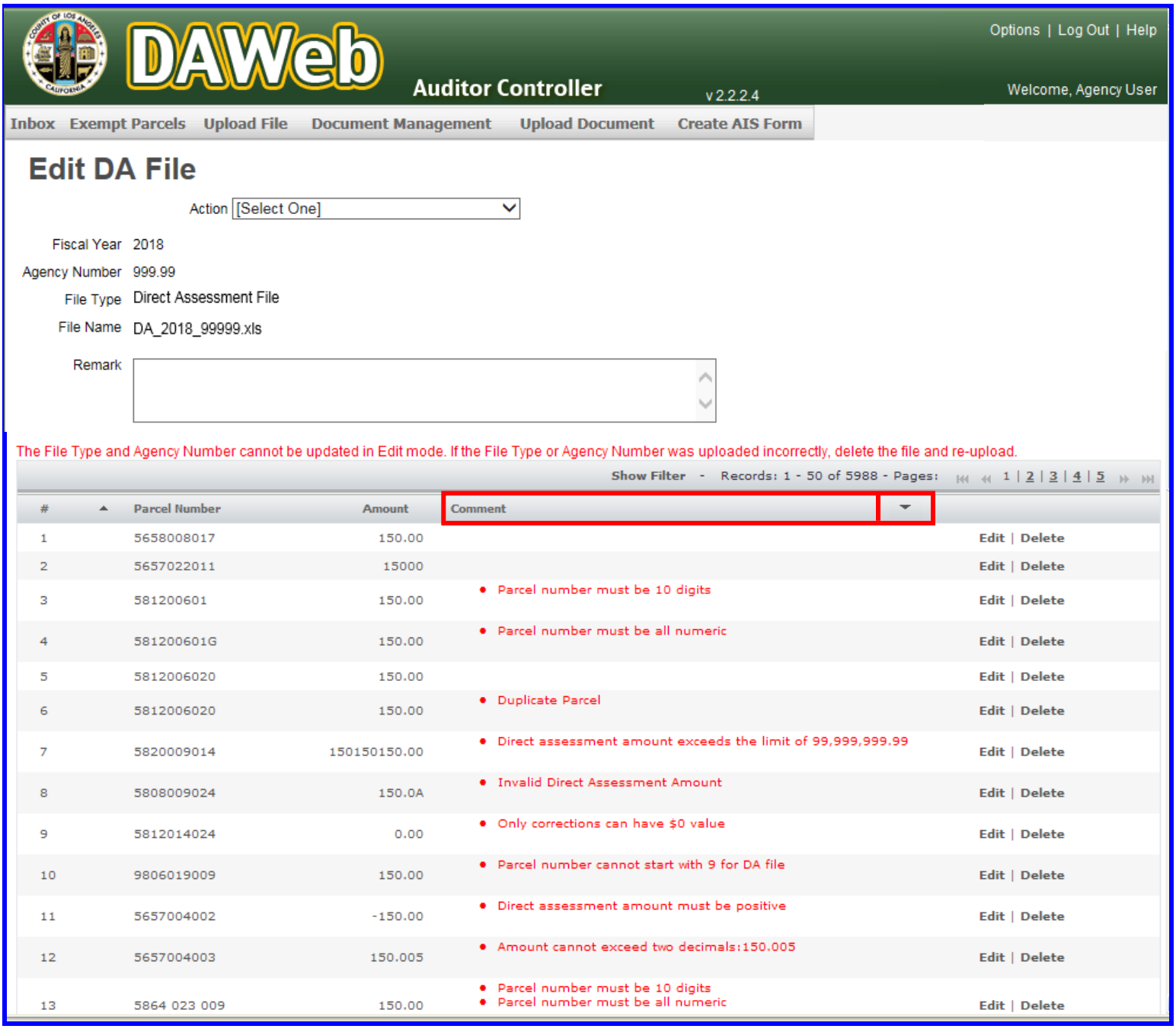


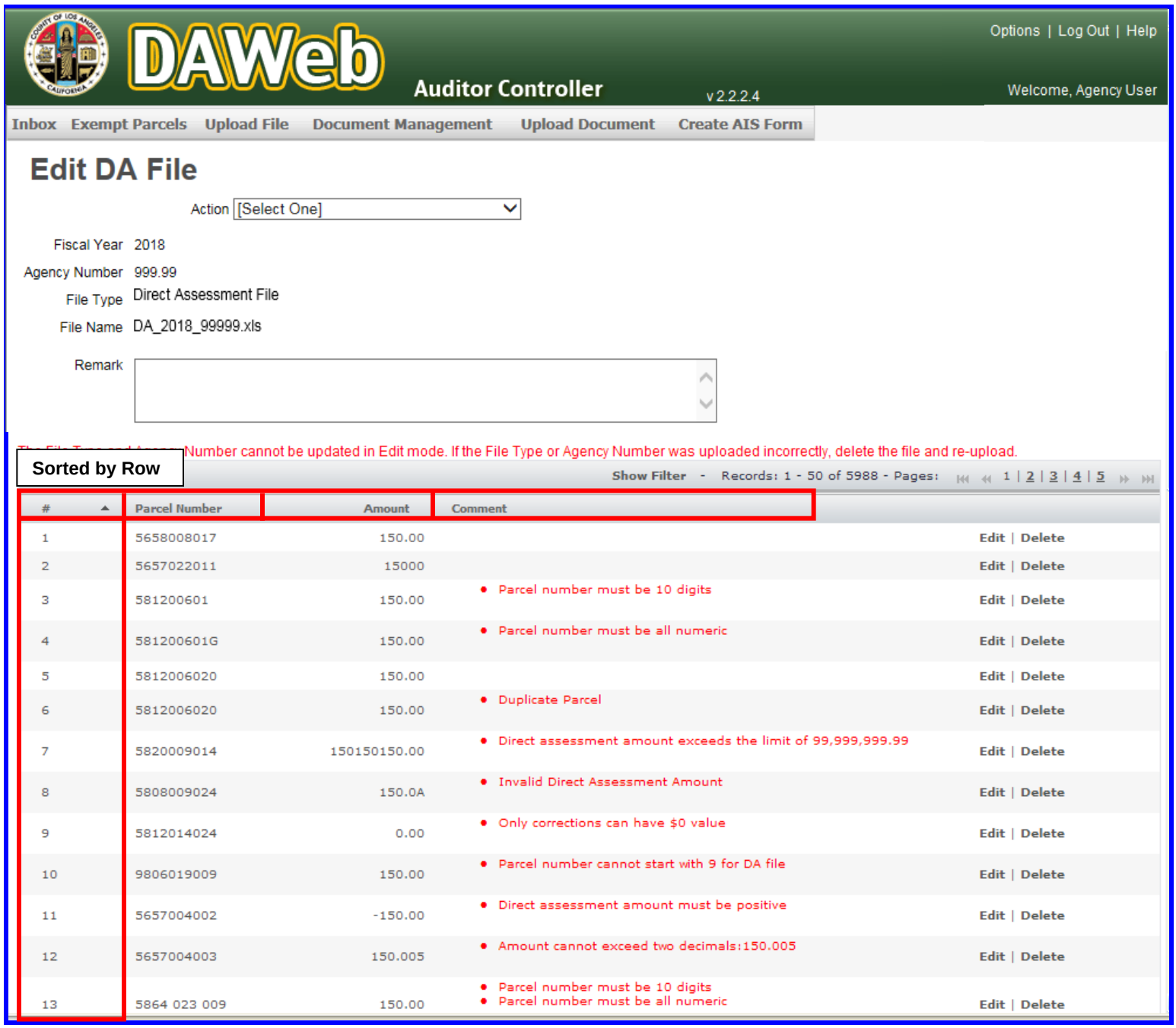
Table of **Error Messages and Solutions**:

ERROR MESSAGE	REASON	EXAMPLE	SOLUTION
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 **800-999**	2348654301 5934820**883** 8584827**999**	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**K**00 876**$**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'	**9**876543210	8765432100
Parcel number must start with '9' for PU file	PU file must start with '9'	**8**765432100	9876543210
Direct Assessment Amount exceeds the limit of 99,999,999.99	Must not exceed **99,999,999.99**	**1**23,456,789.01	23,456,789.01
Invalid Direct Assessment Amount	Not all numeric	1,234.5**H**	1234.52
Direct assessment amount must be positive	Amount cannot be negative	**–**1234.50	1234.50
Direct Assessment Amount cannot exceed two decimal points: XX**.**XXX	Format is not XXXX**.**XX	1,234.56**7**	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

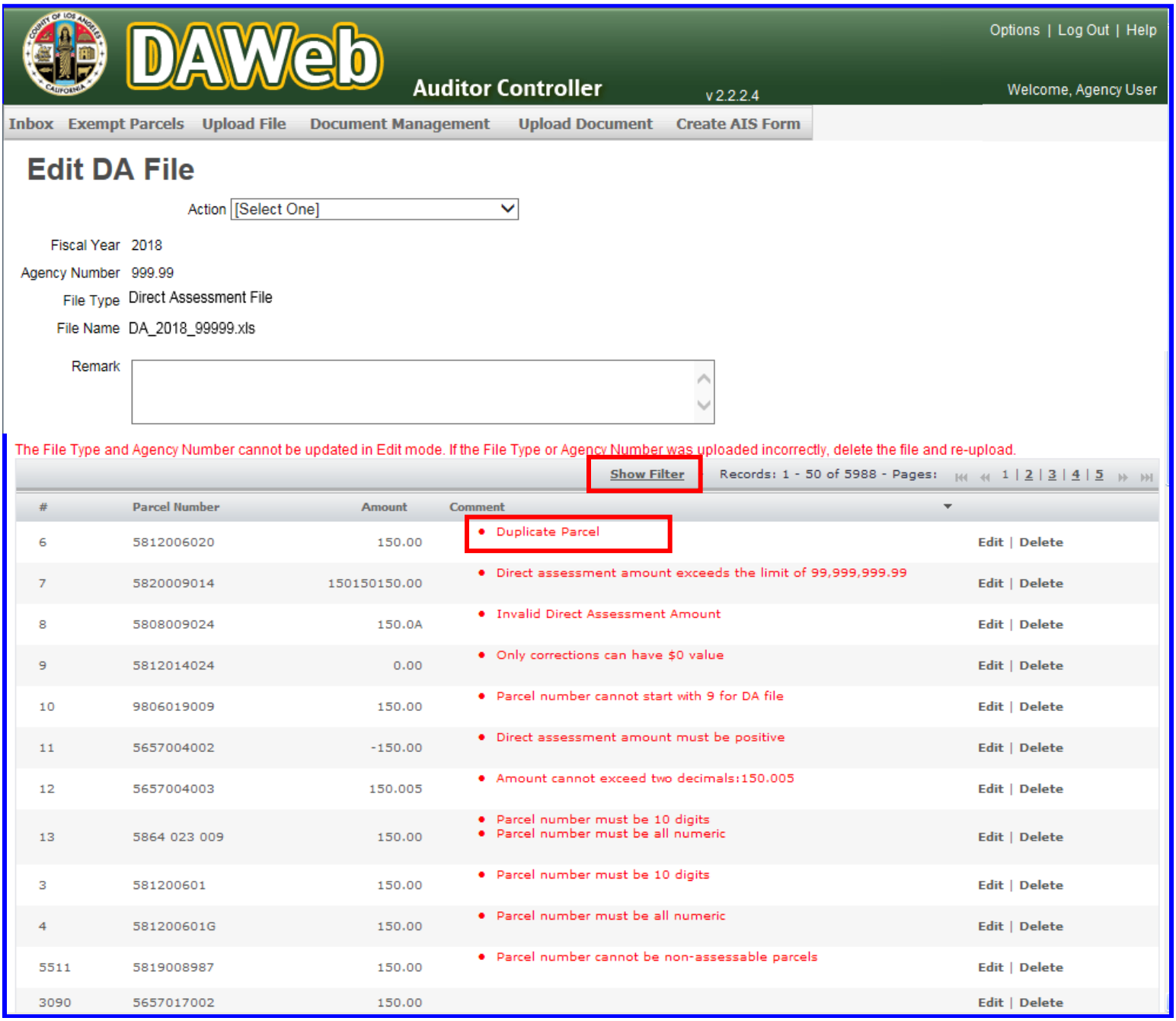
6D. For **parcel number and amount corrections**, **click** the **<u>Comment</u>** header twice until there is a down arrow **to sort/display all of the error messages** to the top of the list.



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

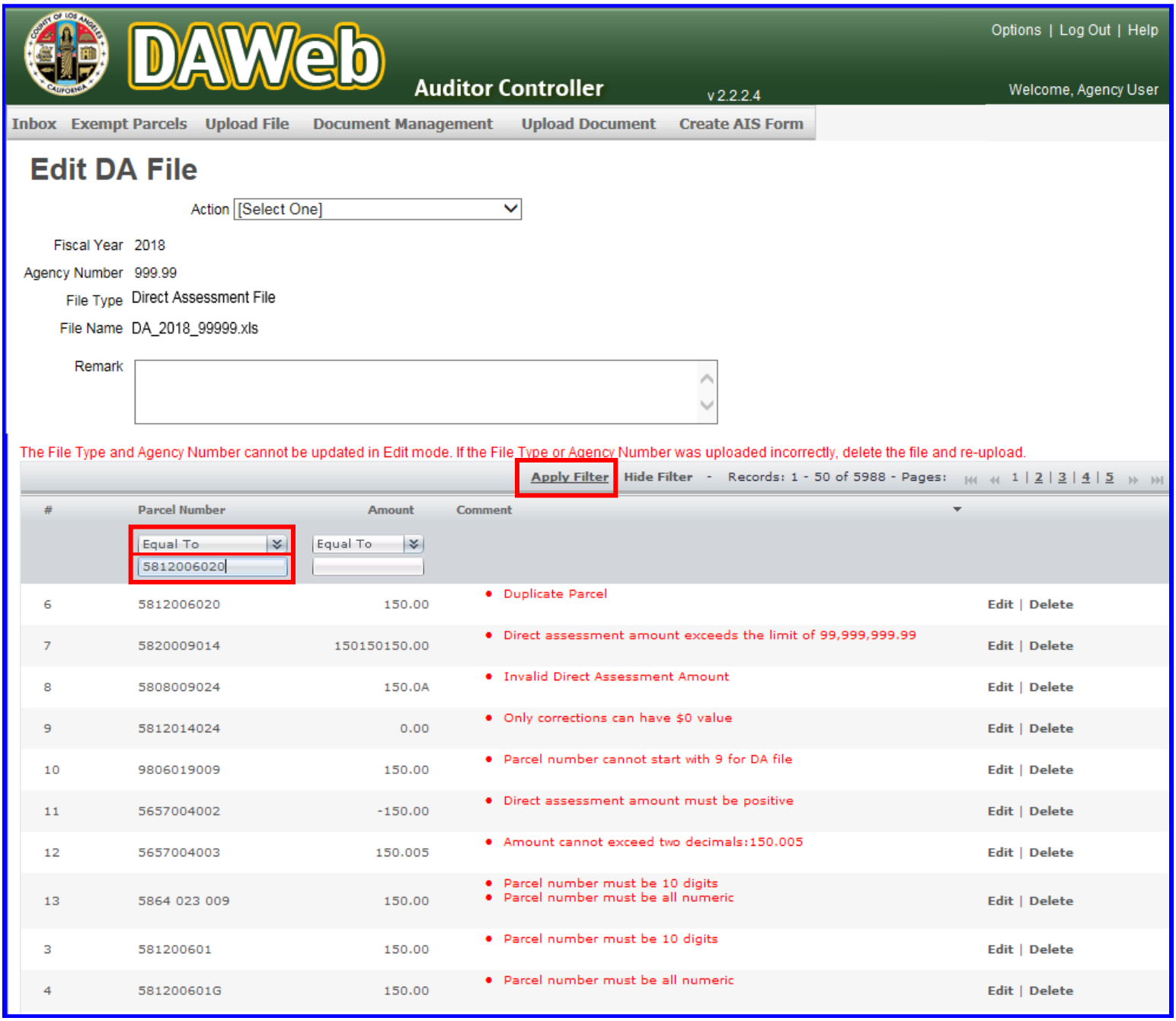


6E. The first error displayed on the list is a **duplicate parcel**. To search for the duplicate parcel number, click the **Show Filter** link.

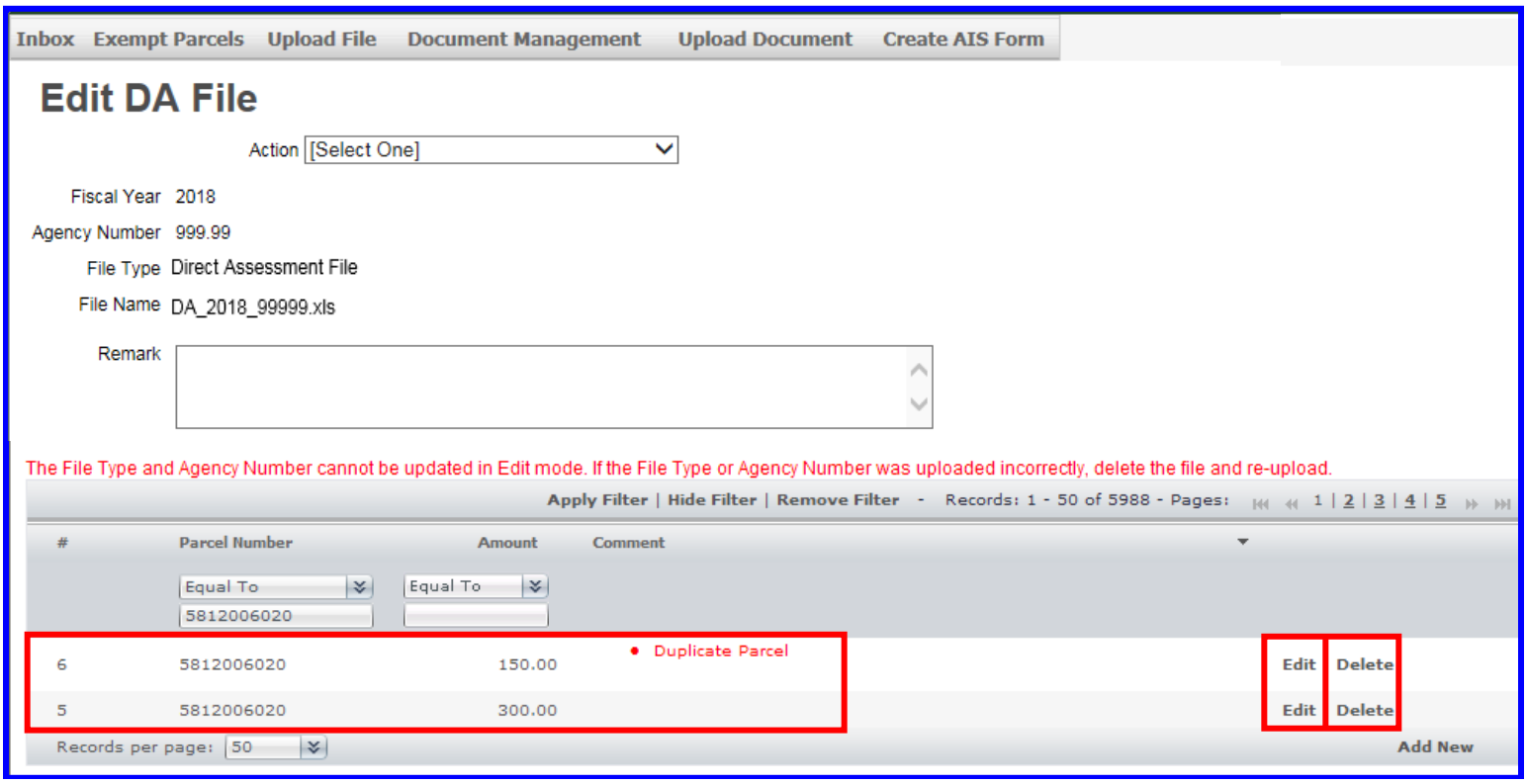


6F. Type in the duplicate parcel number and click the **Apply Filter** link or press the **Enter** button.

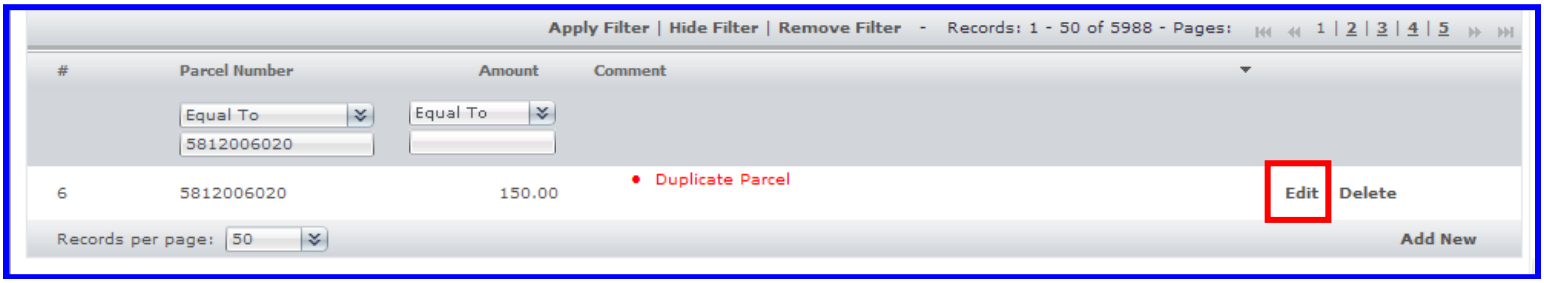
NOTE: The filter drop-down box can be set to **'Equal To'** or **'Starts With'**.

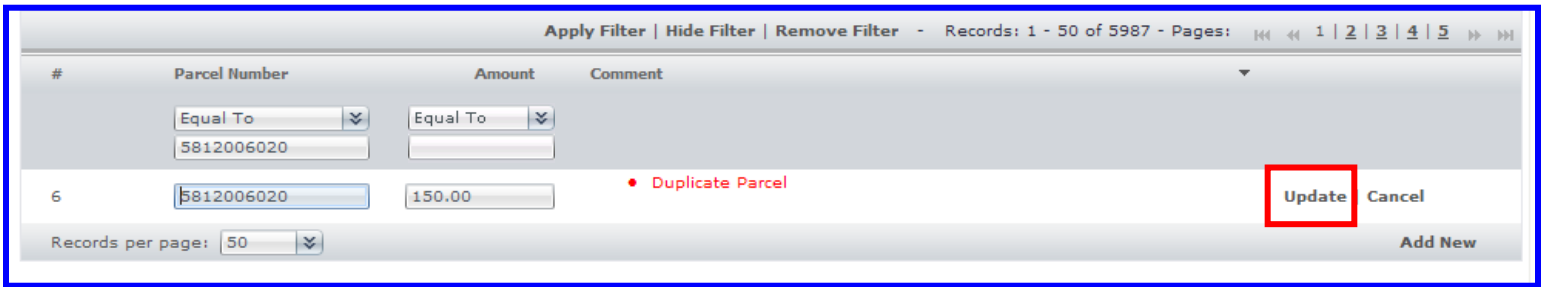


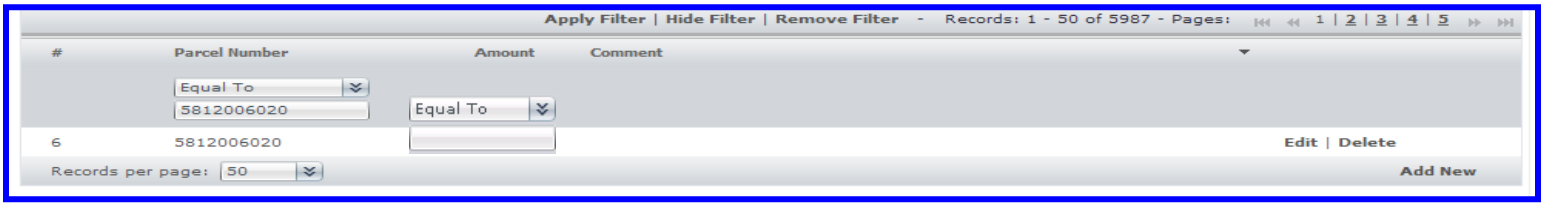
6G. Duplicate parcels may have **different amounts**. Determine which duplicate parcels need to be deleted, click the **Delete** link or click the **Edit** link and update the parcel number(s) so they are no longer duplicates.



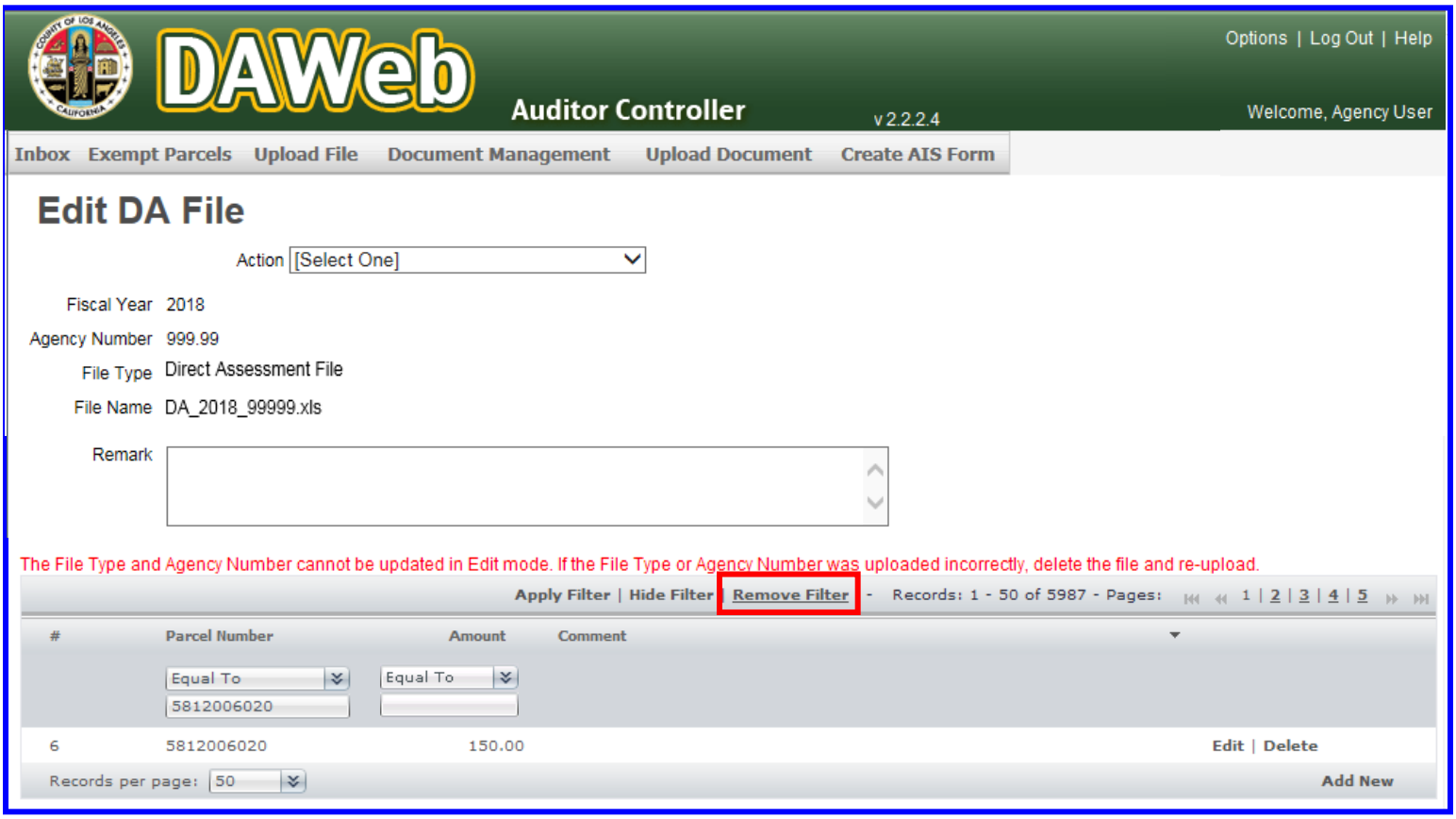
NOTE: If the **Duplicate Parcel** error message did not clear after one of the duplicates was deleted or edited, click the **Edit** link and then click the **Update** link to clear out the comment.



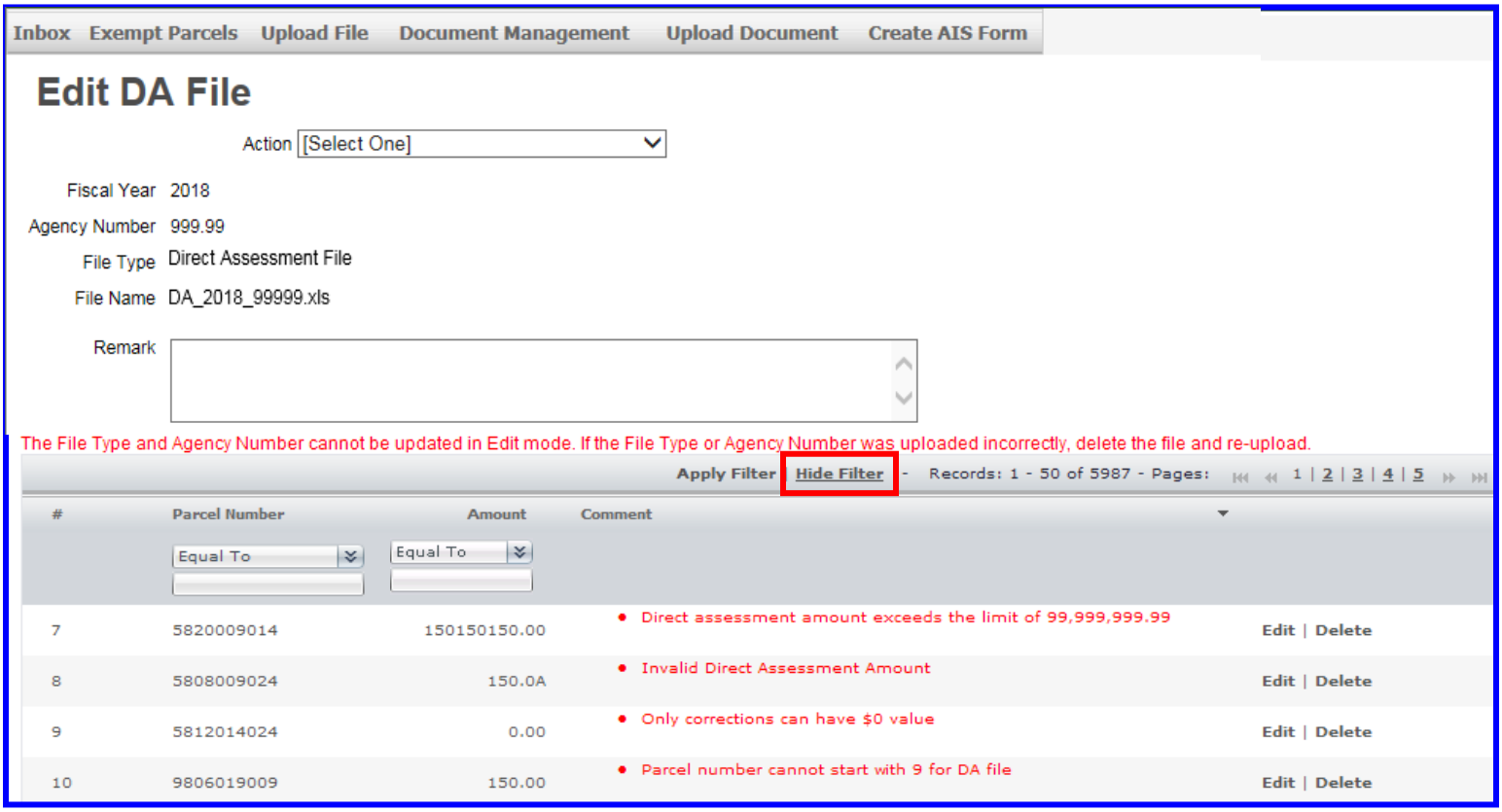




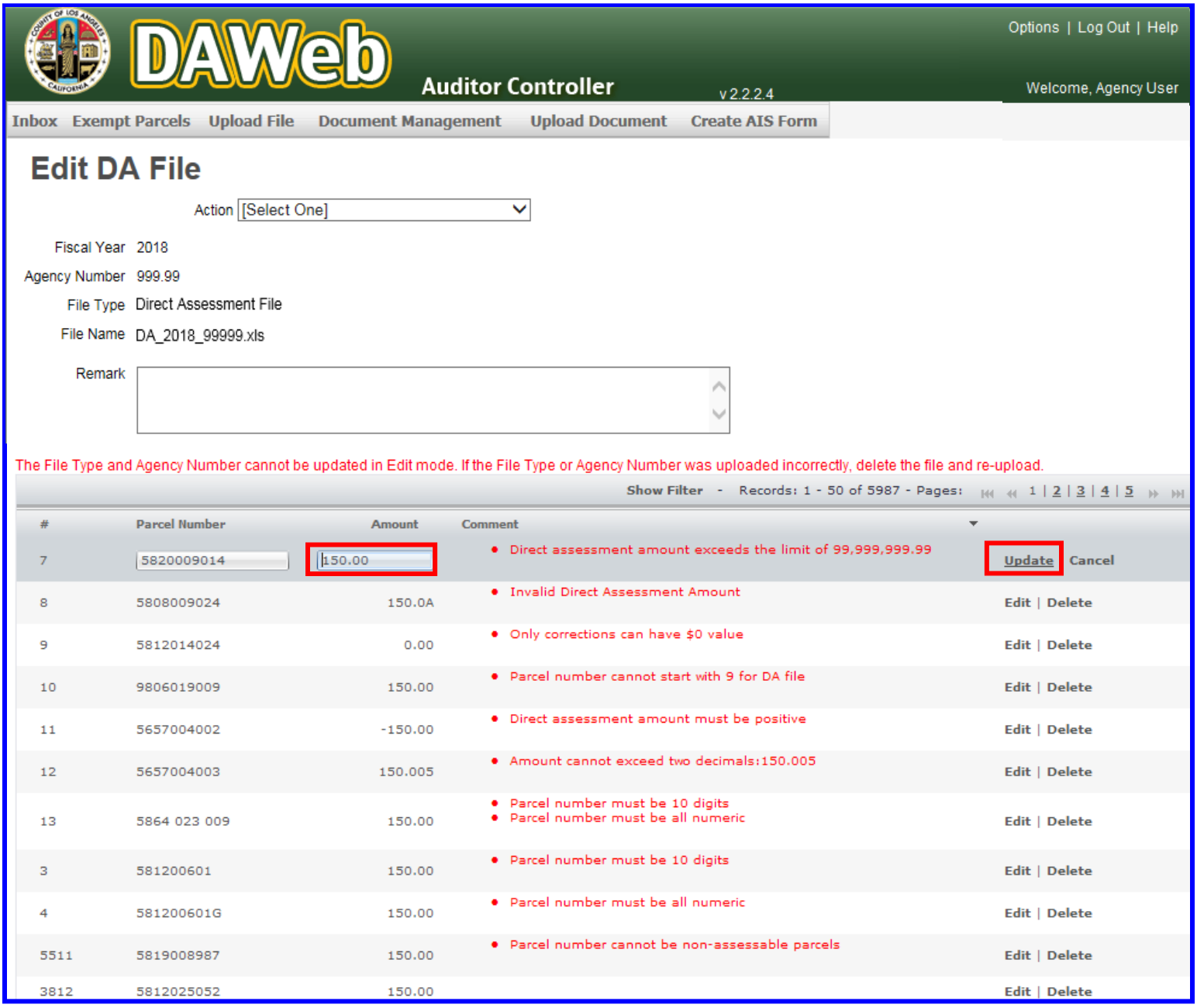
6H. Click the **Remove Filter** link to bring back the list of errors.



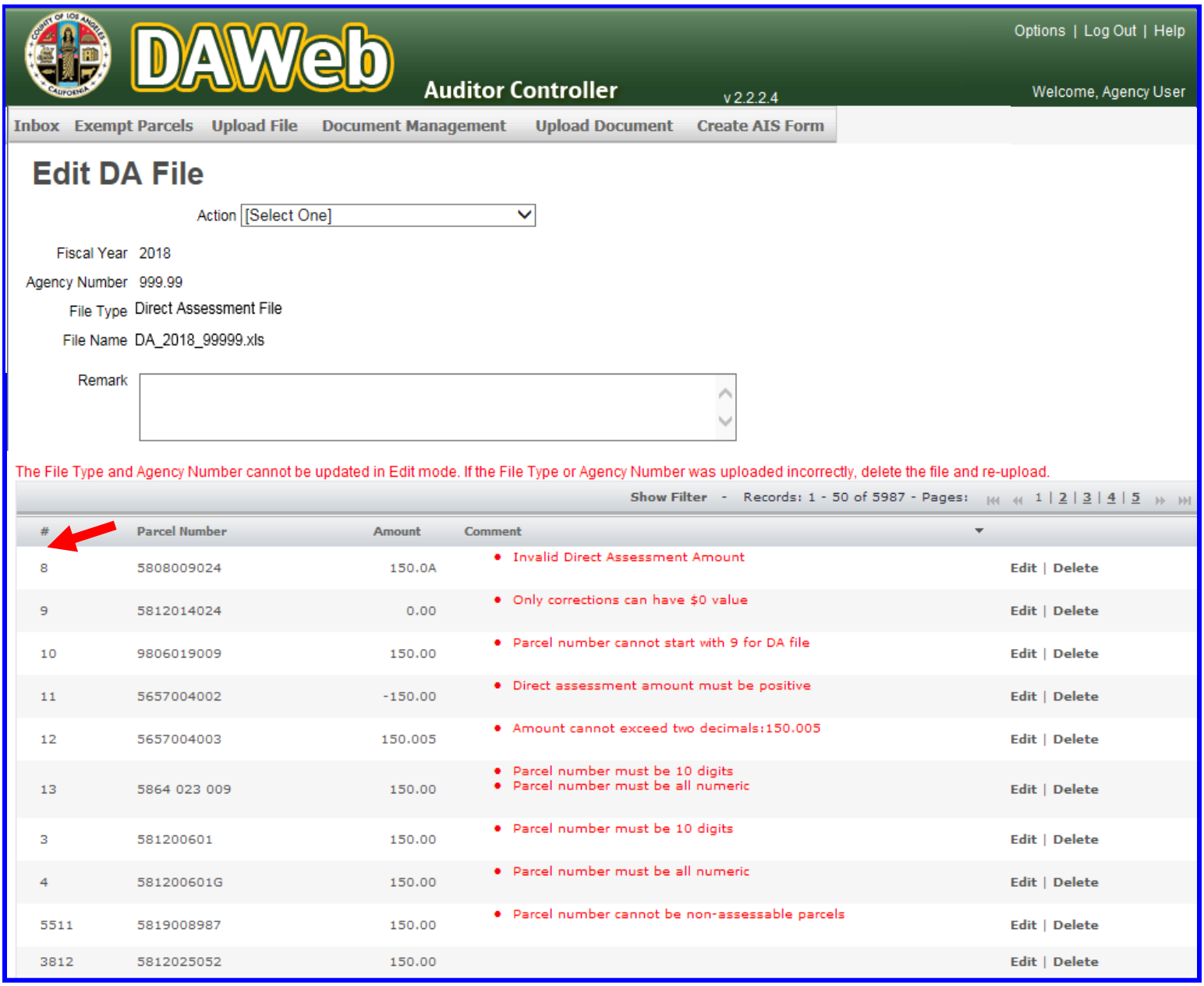
6I. Click the **Hide Filter** link to hide the parcel filter panel.



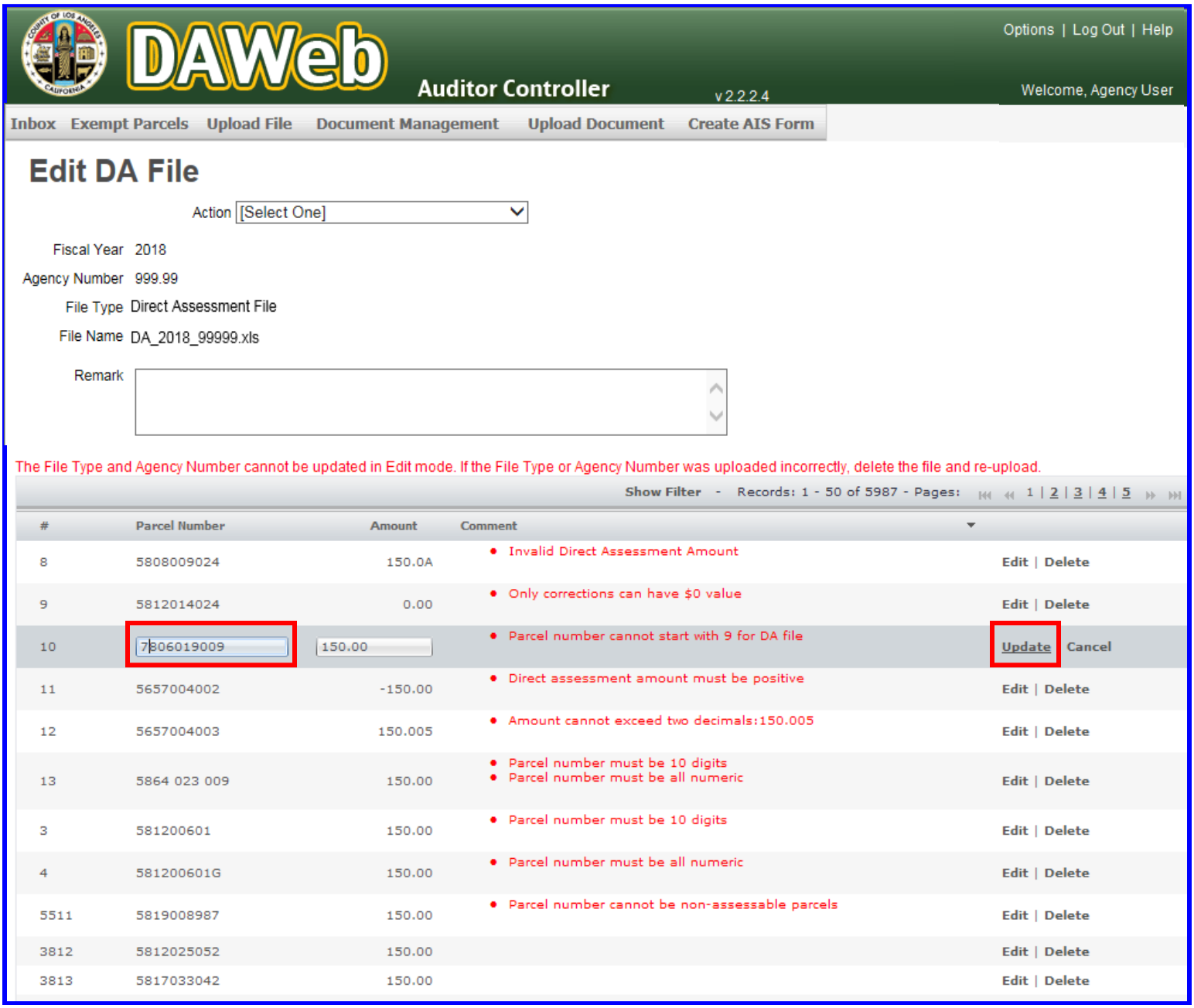
6J. To edit an amount, **click on the <u>Amount</u> field**, **enter the updated amount** in the text box and click the **<u>Update</u>** link.



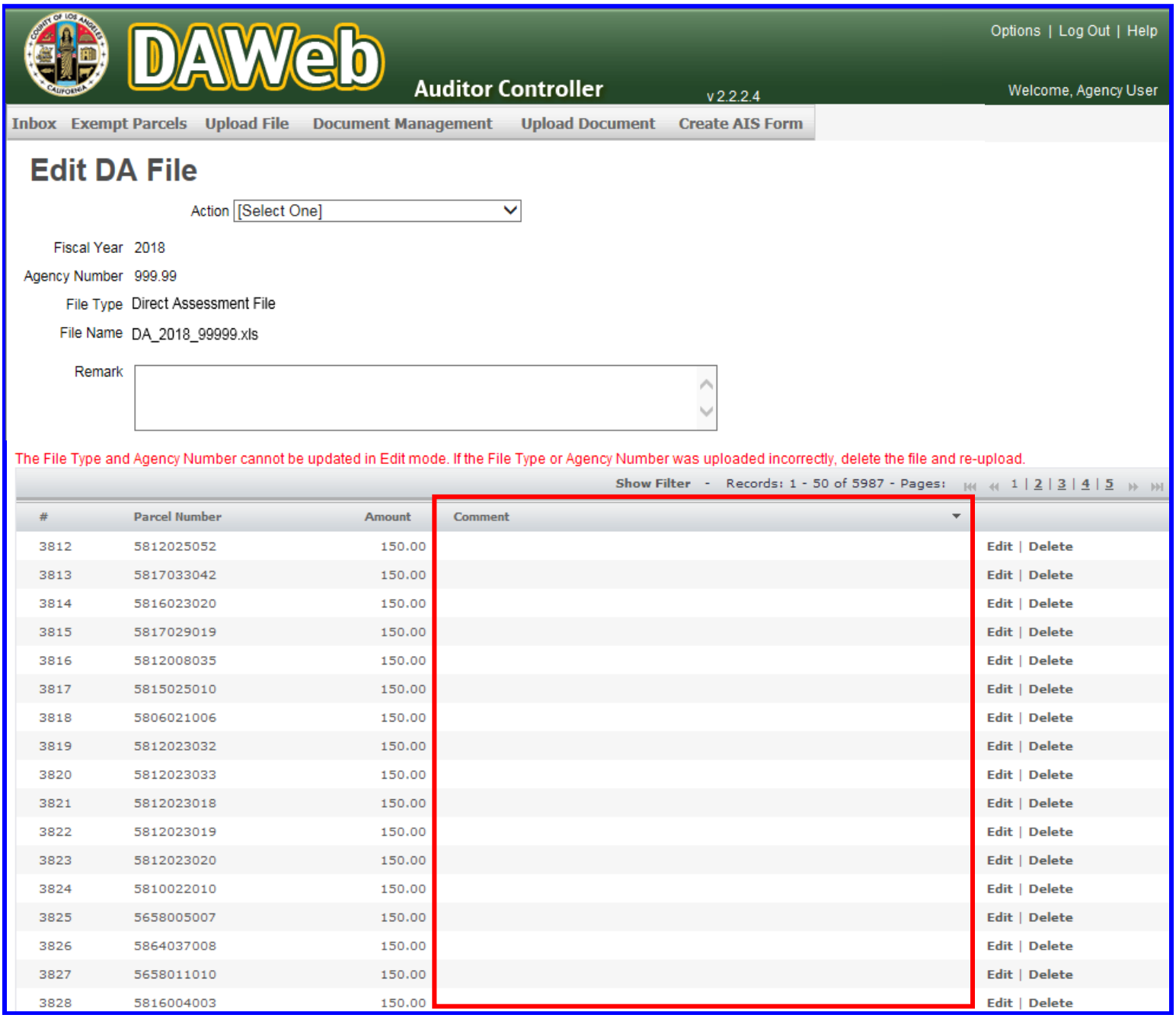
6K. Row #7 (from the previous screen) has been updated and **no longer appears at the top of the list** since it no longer contains an error message and the columns are **sorted by the <u>Comment</u> field**.



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



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



#	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 Add New - 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
	8777777777	150.00	
Grand Total	Total TXN CNT 5,987	Total Amount $898,050.00	

Records per page: 50 Save Cancel - 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	

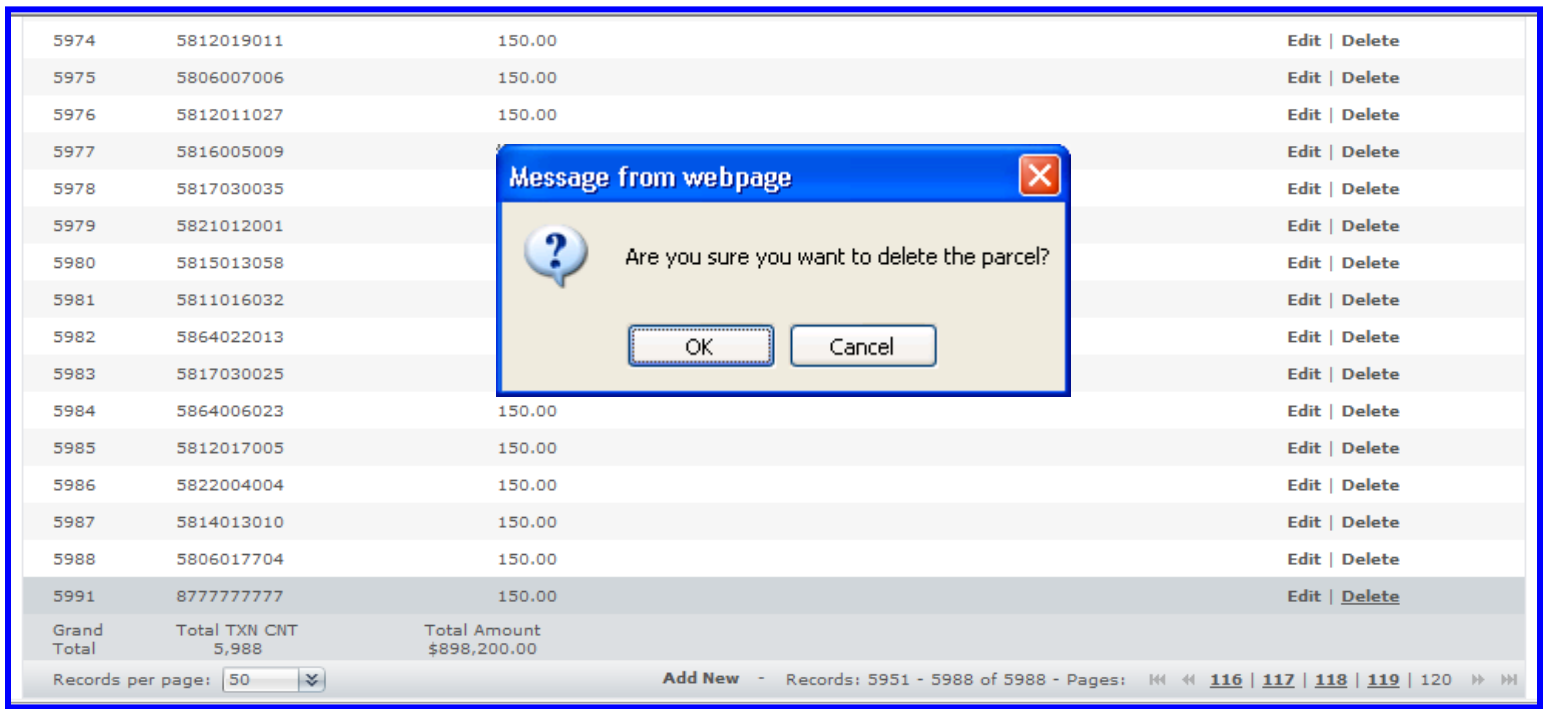
Records per page: 50 **Add New** - Records: 5951 - 5988 of 5988 - Pages: 116 | 117 | 118 | 119 | 120

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

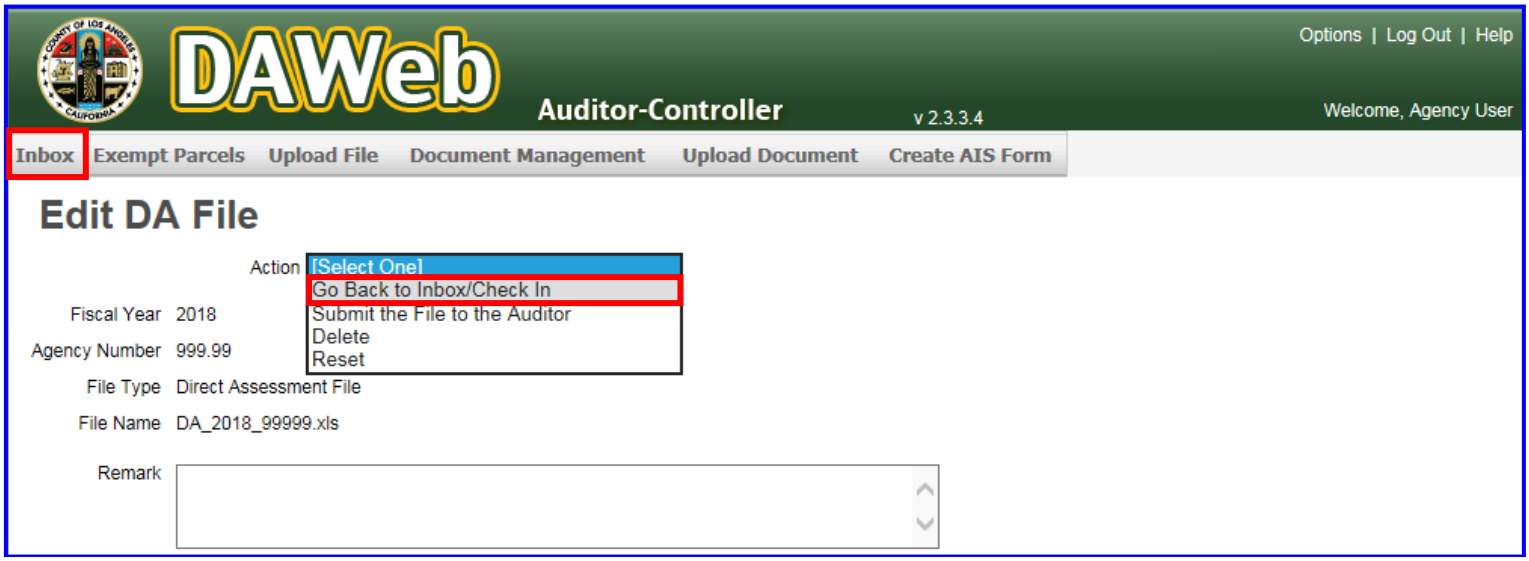
5974	5812019011	150.00	Edit | Delete
5975	5806007006	150.00	Edit | Delete
5976	5812011027	150.00	Edit | Delete
5977	5816005009	150.00	Edit | Delete
5978	5817030035	150.00	Edit | Delete
5979	5821012001	150.00	Edit | Delete
5980	5815013058	150.00	Edit | Delete
5981	5811016032	150.00	Edit | Delete
5982	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 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

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



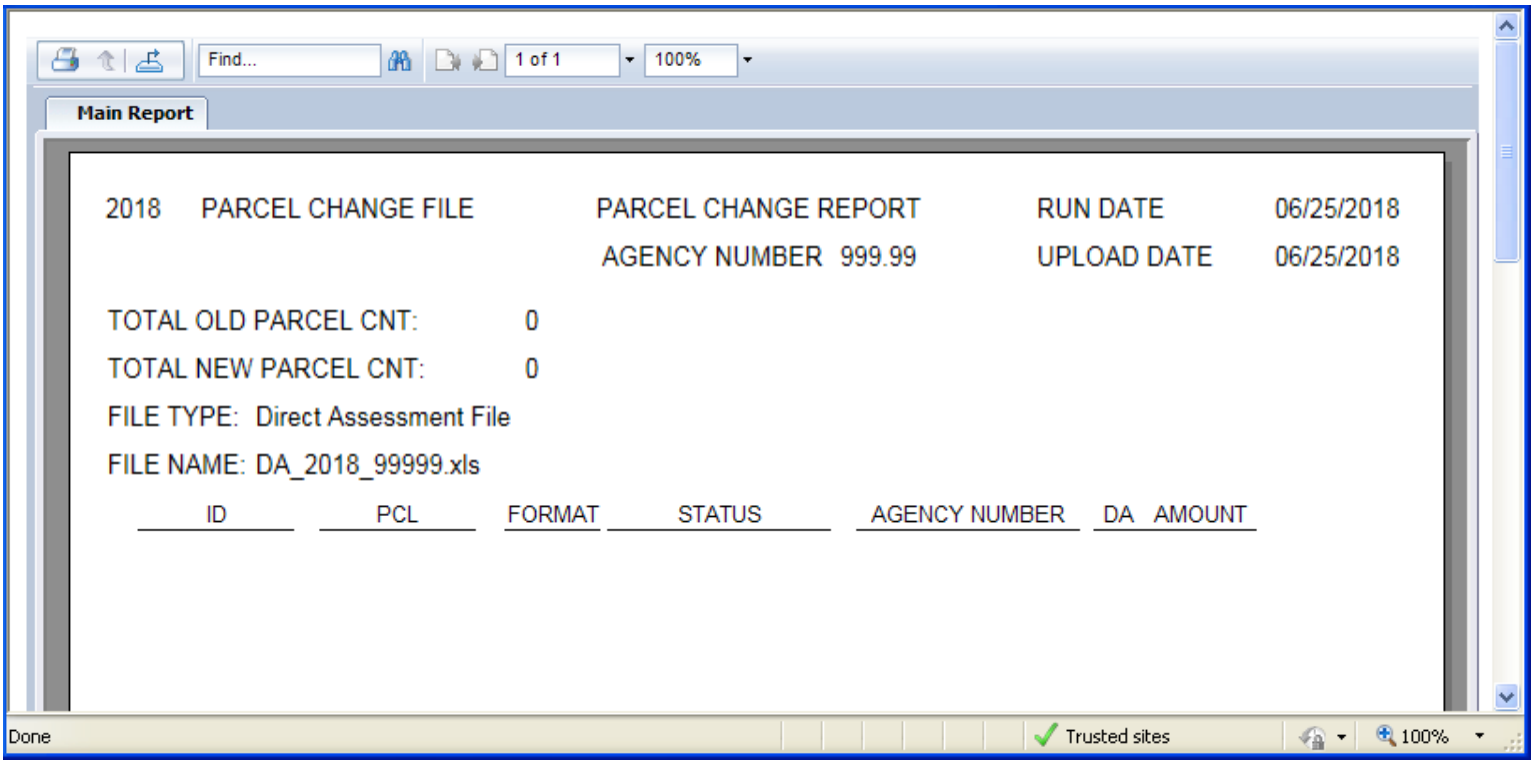
6S. After all of the errors are fixed, new parcels added and old parcels deleted, **click** the **action drop-down menu** and **select <u>Go Back to Inbox/Check In</u>** to bring you back to the Inbox and automatically check in the file. **Clicking** on the **<u>Inbox</u> tab** will also take you back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



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**.

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

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:

• Delete the current file from the Inbox and re-upload new file with parcel changes included in the file	Go to **Create the Excel Input Data File (P. 33)** or **Create the Text Input Data File (P. 42)**
• Add new parcels and delete old parcels in Edit mode	Go to **Correct the Data File in Edit Mode (P. 66)**
• Complete Upload Original DA File process AND • Submit parcel changes as corrections	Go to **Upload Correction File and Correction Data Transmittal (P. 100)**

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)**.

DATE: **February 17, 2023**

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

FILE TYPE:	**Direct Assessment File**
AGENCY ACCOUNT NUMBER:	**999.99**
BILL DESCRIPTION:	**LA County Test**
TOTAL ASSESSMENT AMOUNT:	**$2,339,388.29**
TOTAL PARCEL COUNT:	**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: **'<u>Upload Legal Documents</u>'** section **(P.87)**.

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 '<u>Check the Status of Legal Documents</u>' section **(P. 113).**

7B. To upload legal documents, click the **<u>Upload Document</u>** tab.

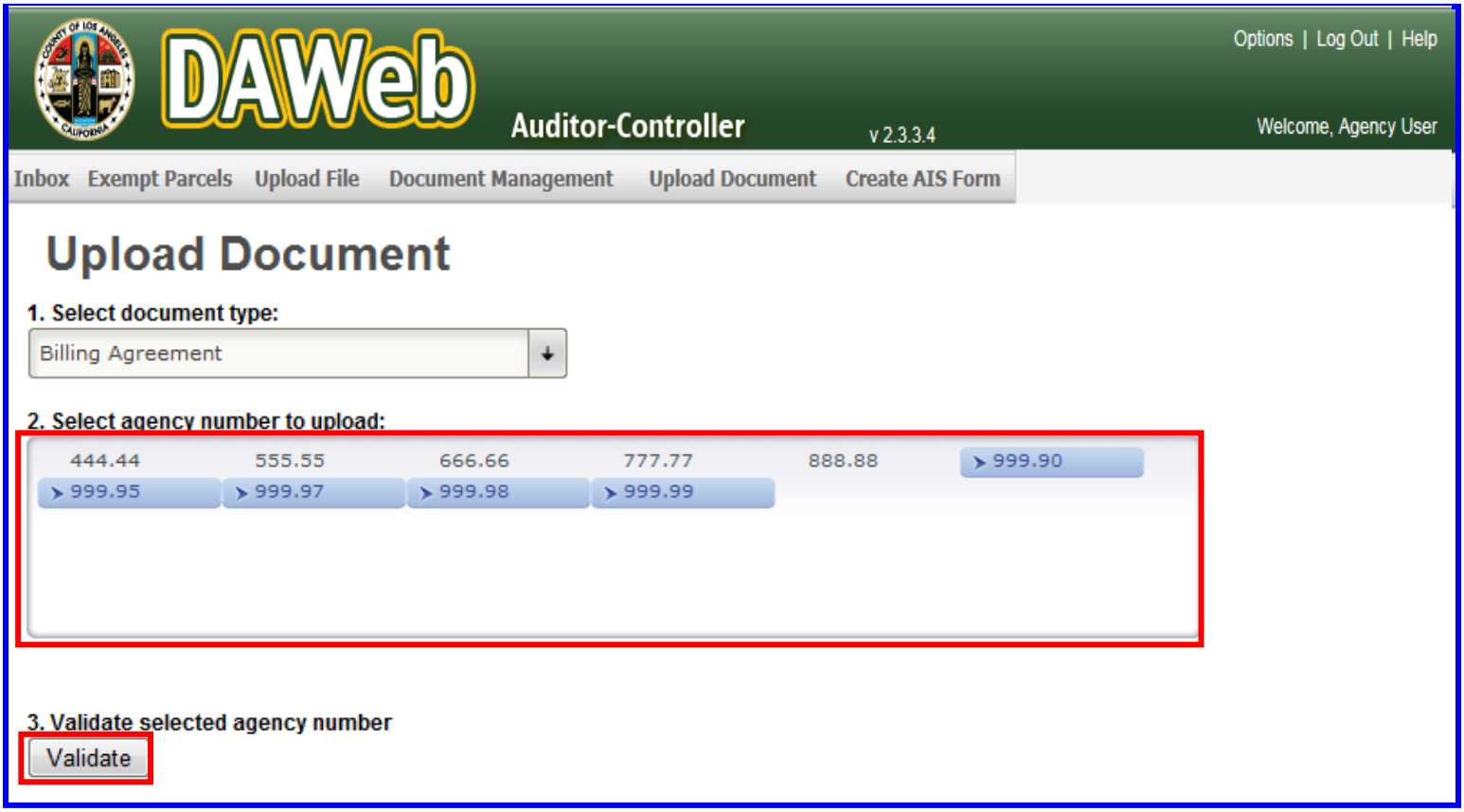
7C. Click on the drop-down box under **<u>Select document type</u>**: and select the document type that you want to upload. For this example, **<u>Billing Agreement</u>** will be selected.

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

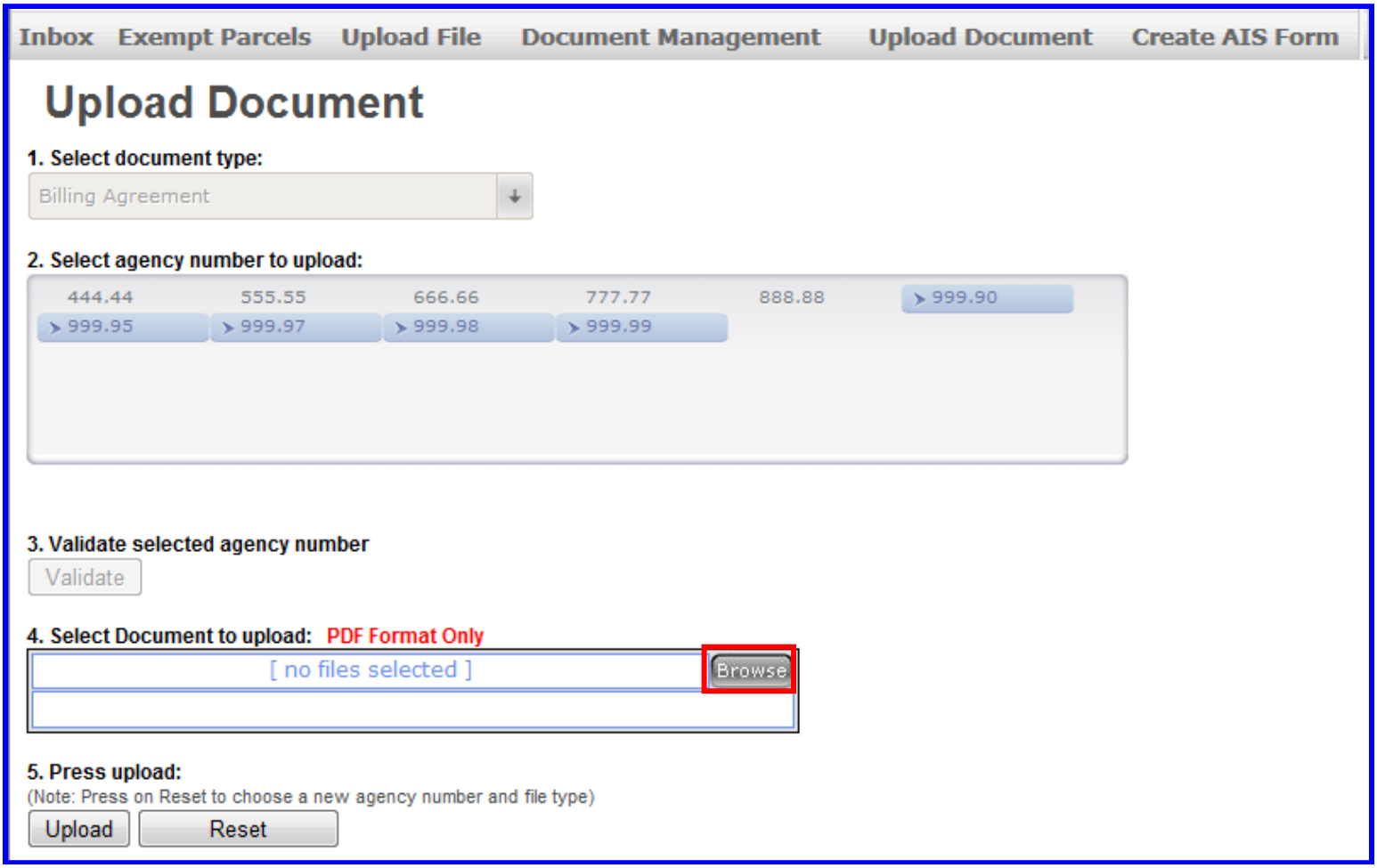
- Under **step 2**, click on agency number(s) to upload from the list of agency numbers.

  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.

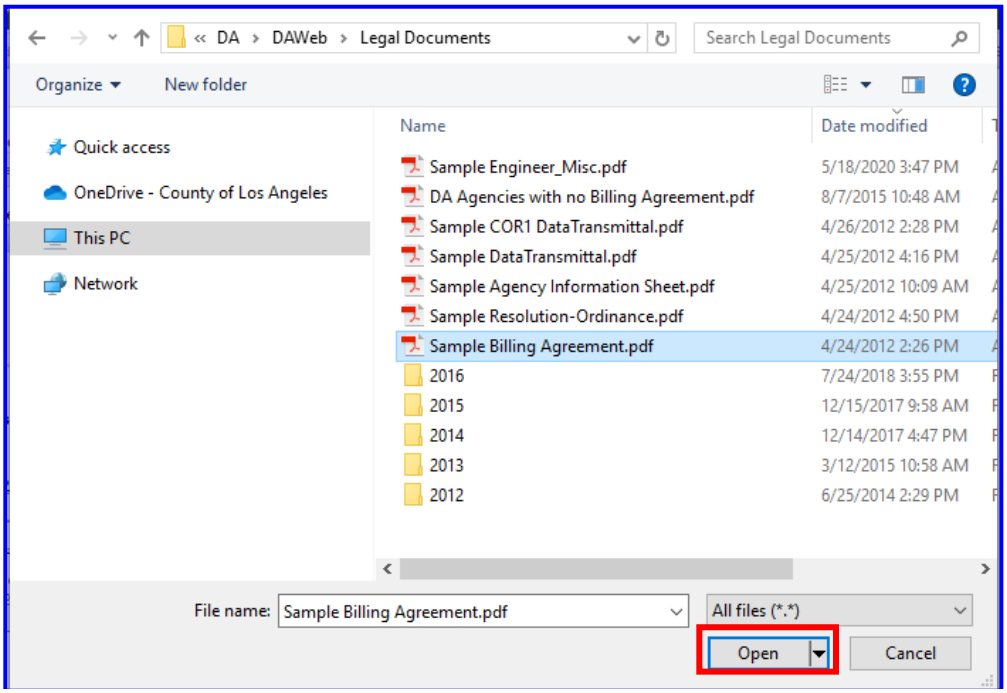
- Under **step 3**, click the **<u>Validate</u>** button to validate the agency number(s).



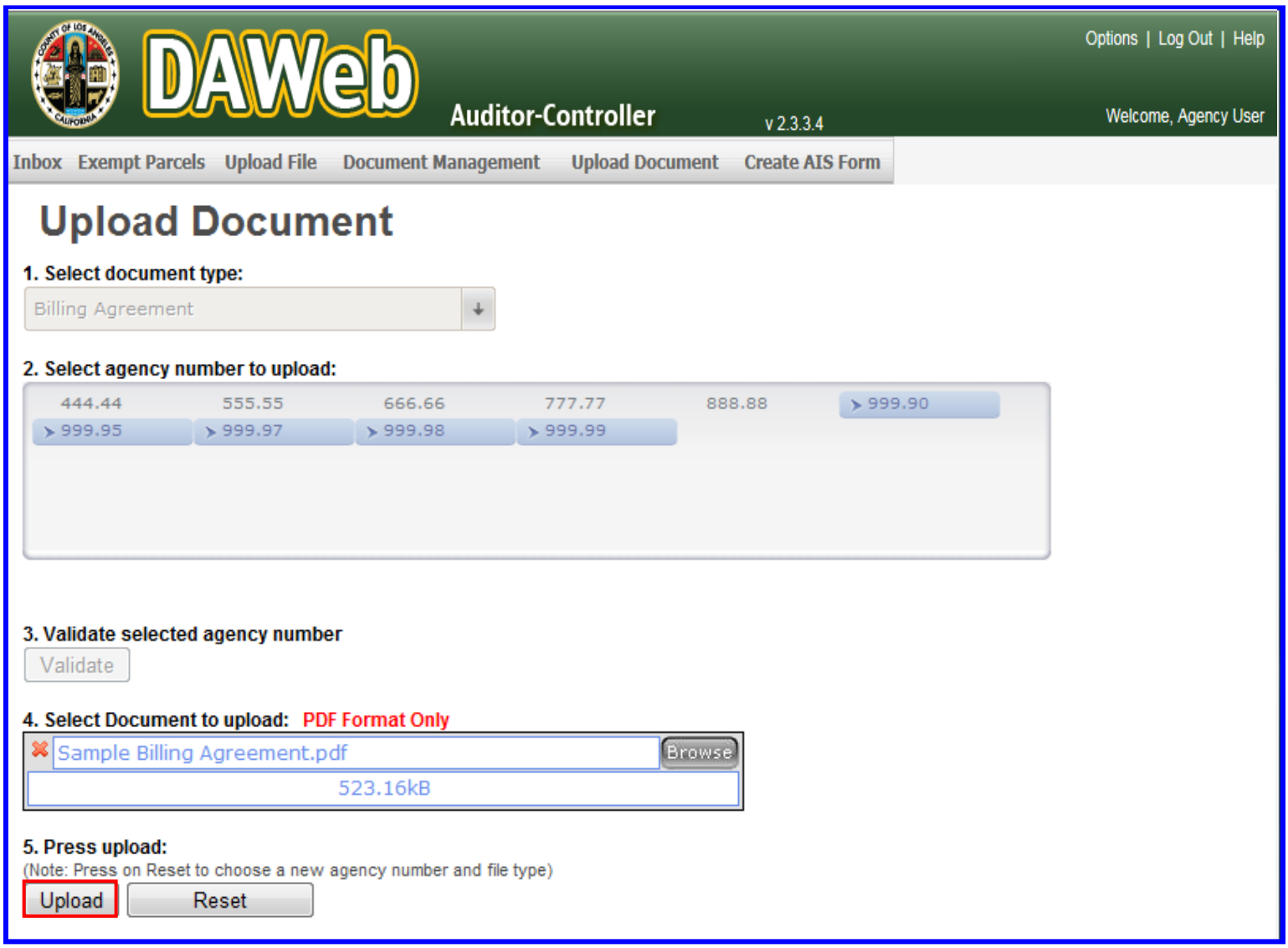
7E. Under **step 4**, click the **Browse** button to upload the document.



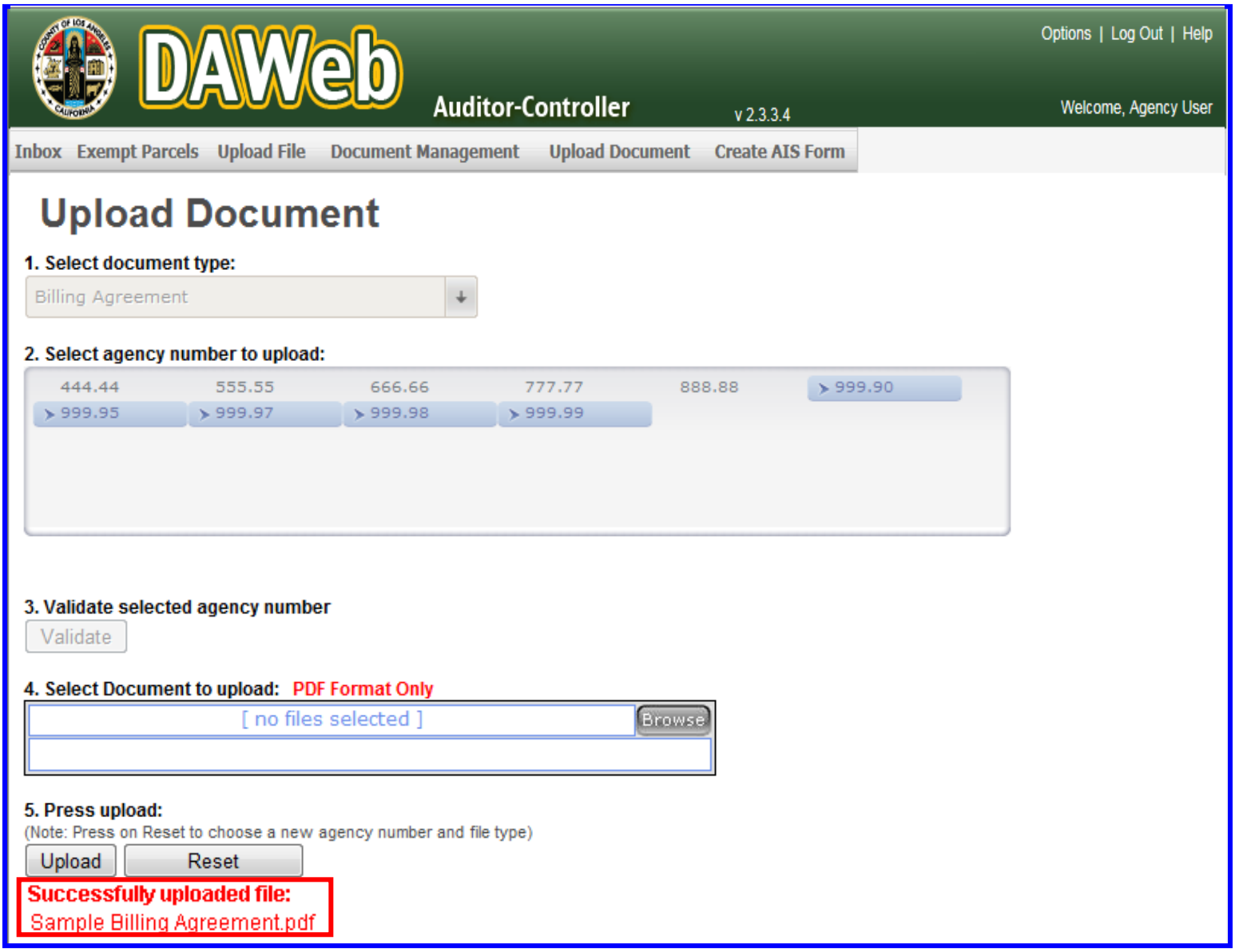
7F. Select a .PDF document to upload and click the **Open** button or double click on that document. **Documents must be in .PDF format.**



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



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**.



7I. 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.

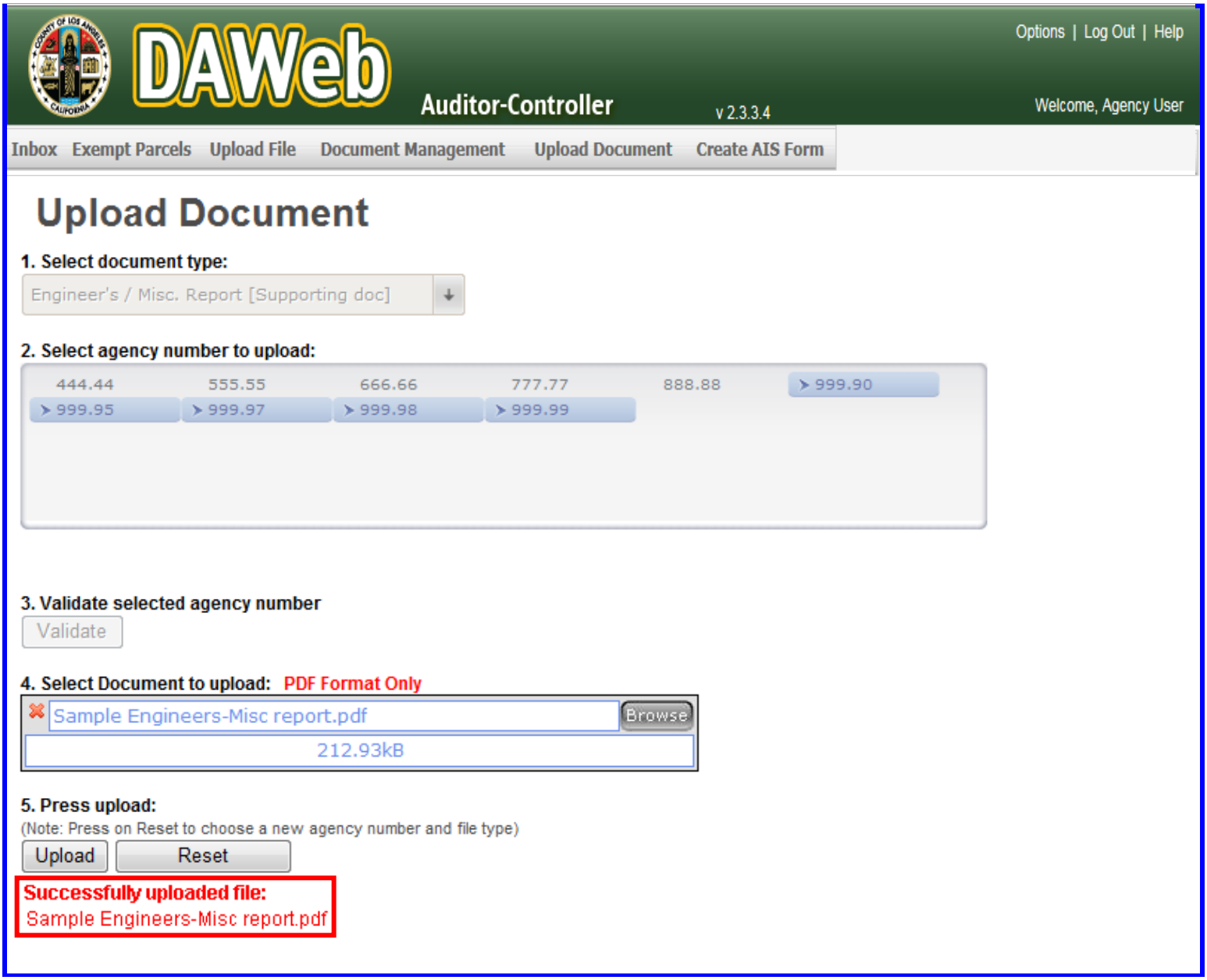
NOTE: Selecting multiple accounts only works for **Billing Agreement**, **Resolution/Ordinance** and **Engineer's/Misc report** document type. To deselect the group of selected agency numbers, click on any agency number without holding down the Control (CTRL) button.

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.**

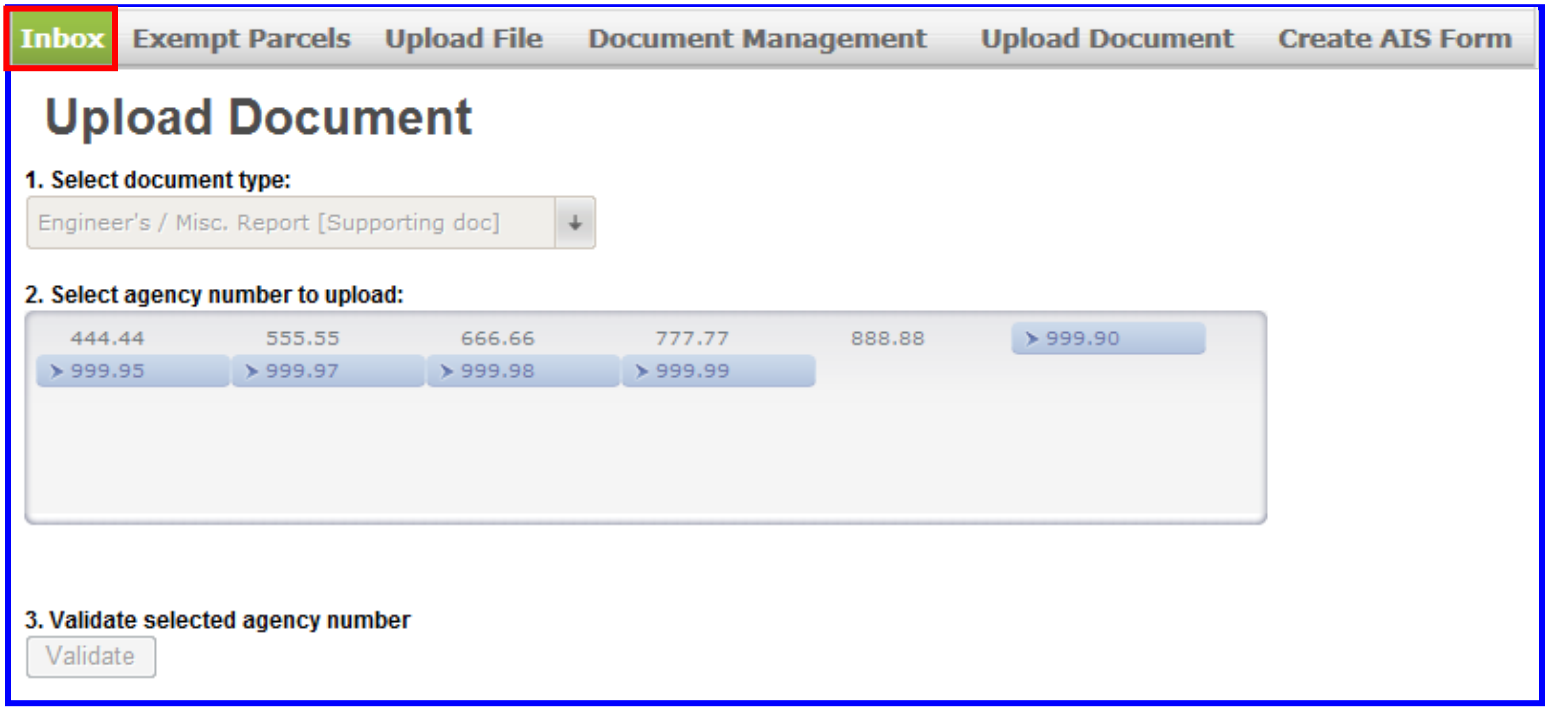
7K. A file must be uploaded and valid before uploading the Data Transmittal for the following reasons:

- **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.**

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.



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



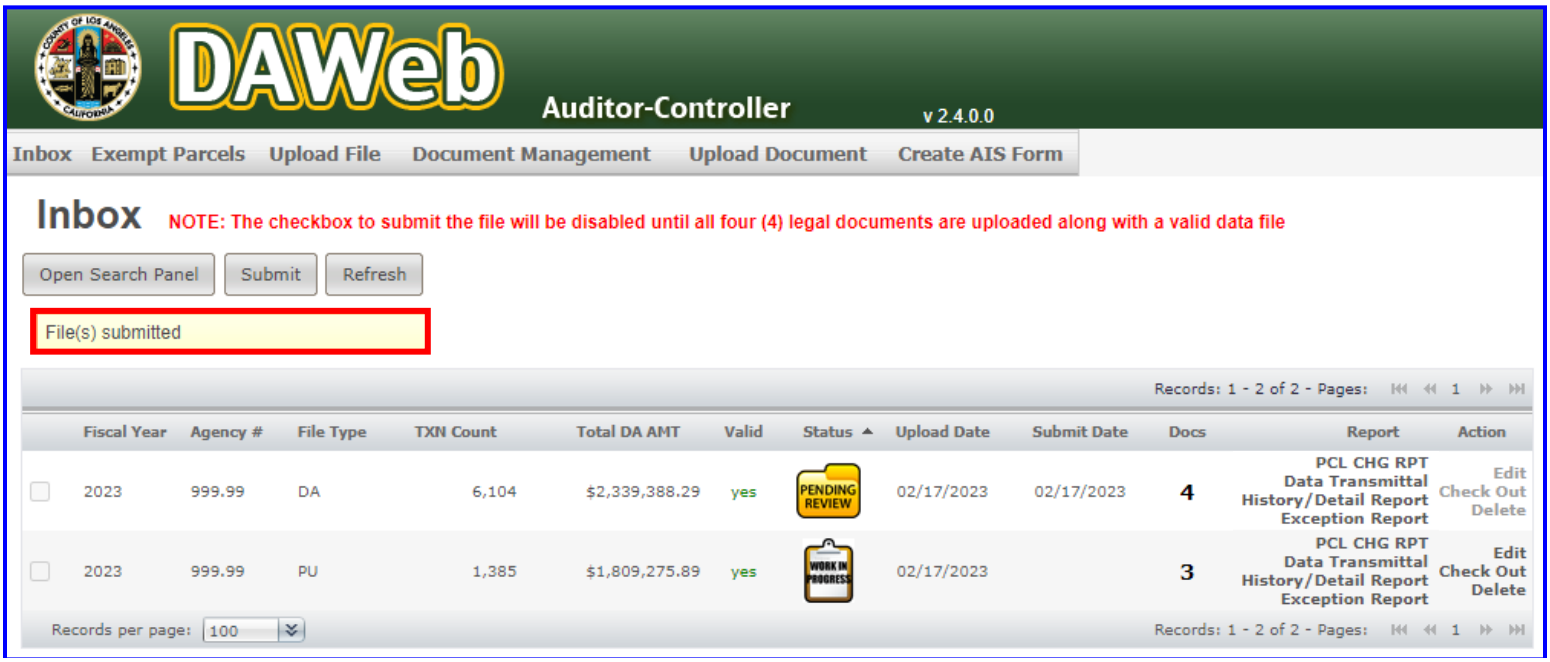
7N. If the file(s) are valid and the document counter under the Docs column is equal to **'4'**, then check the checkbox and click the **Submit** button. Multiple files can be checked and submitted simultaneously.

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 '<u>Check the Status of Legal Documents</u>'** section **(P. 113)**.

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

7O. Press **OK** to submit or **Cancel** to cancel the submission.

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.



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
☐	2023	999.99	DA	6,104	$2,339,388.29	yes	WORK IN PROGRESS	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
☐	023	999.99	DA	6,104	$2,339,388.29	yes	PENDING REVIEW	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
☐	023	999.99	DA	6,104	$2,339,388.29	yes	PENDING APPROVAL	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
☐	2023	999.99	DA	6,104	$2,339,388.29	yes	WORK IN PROGRESS	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
☐	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

- **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
☐	2023	999.99	DA	6,104	$2,339,388.29	yes	BATCHED	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
☐	2023	999.99	DA	6,104	$2,339,388.29	yes	SENT TO MAINFRAME	02/17/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

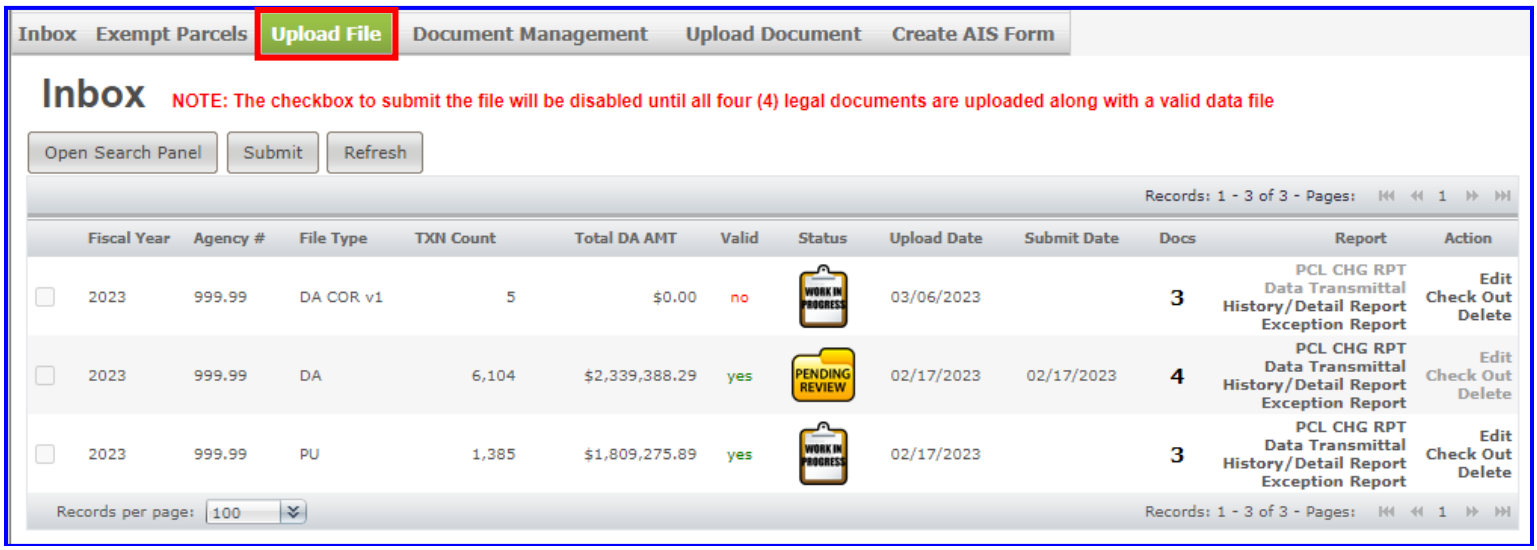
NOTE: Click the **Refresh** button periodically to update the **Status** and **Docs** columns. The Status and Docs columns will not update if you are in the Inbox while the Auditor is updating the status of your files and/or documents.

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 <u>$13 per parcel</u>. Only one correction file per Agency number and per File Type should be submitted before each Wednesday and Saturday STR Update.

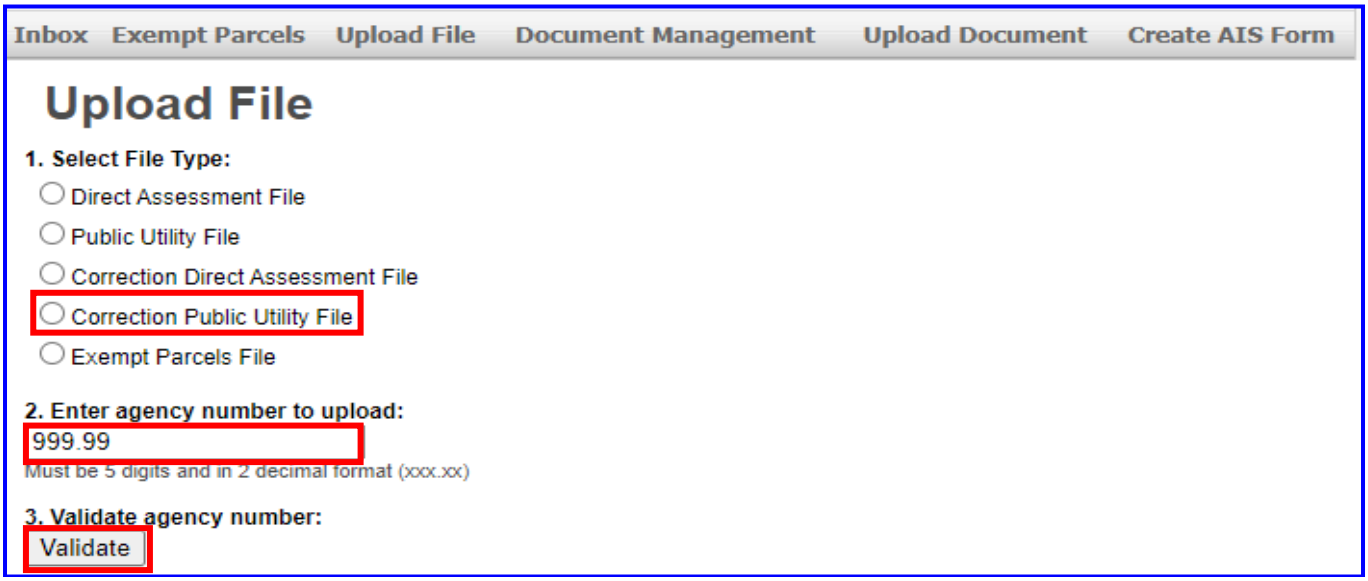
8A. To upload a DA or PU correction (COR) file, click the **<u>Upload File</u>** tab.

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.

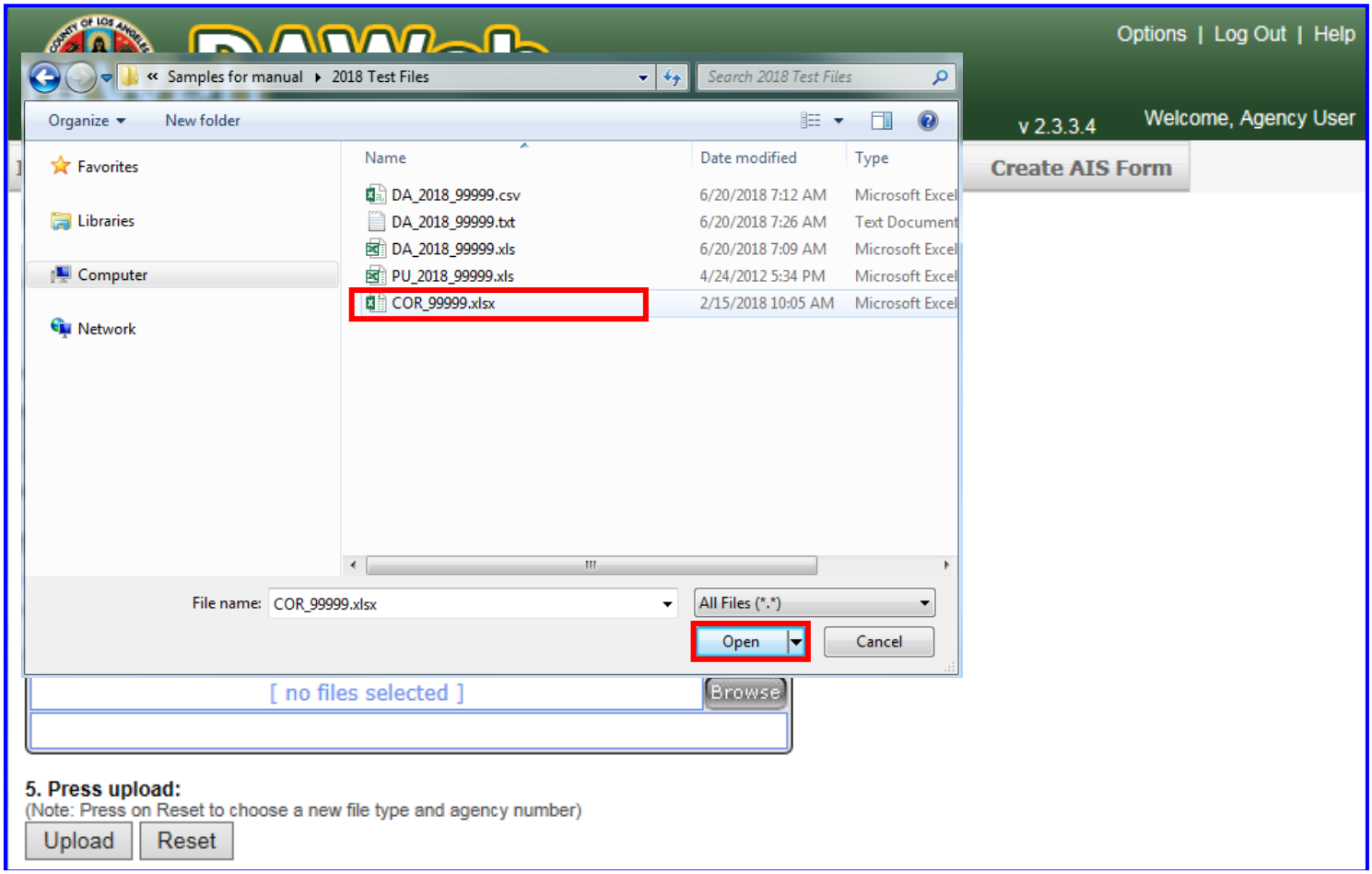


8B. Perform the following upload steps:

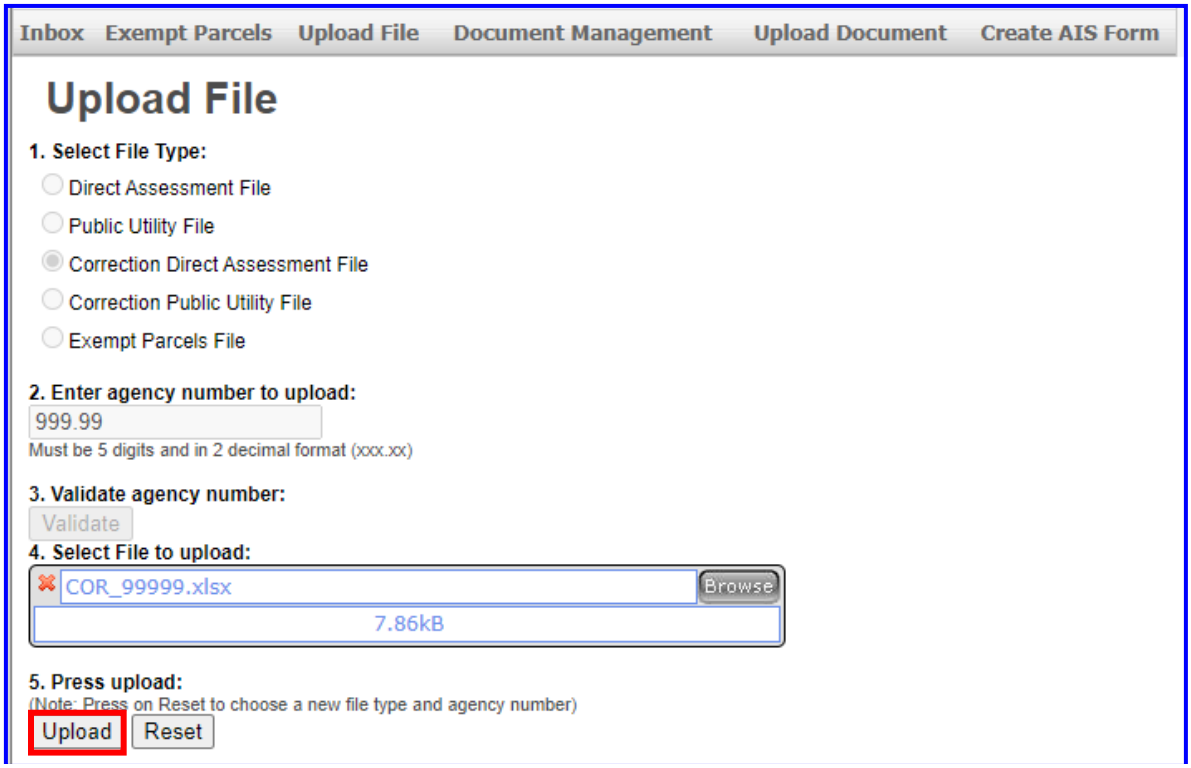
1. **Select the type of file** (Correction File) to upload.
2. **Enter Agency number** to upload. Agency number must be 5 digits and in 2 decimal format.
3. Click the **<u>Validate</u>** button.



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



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

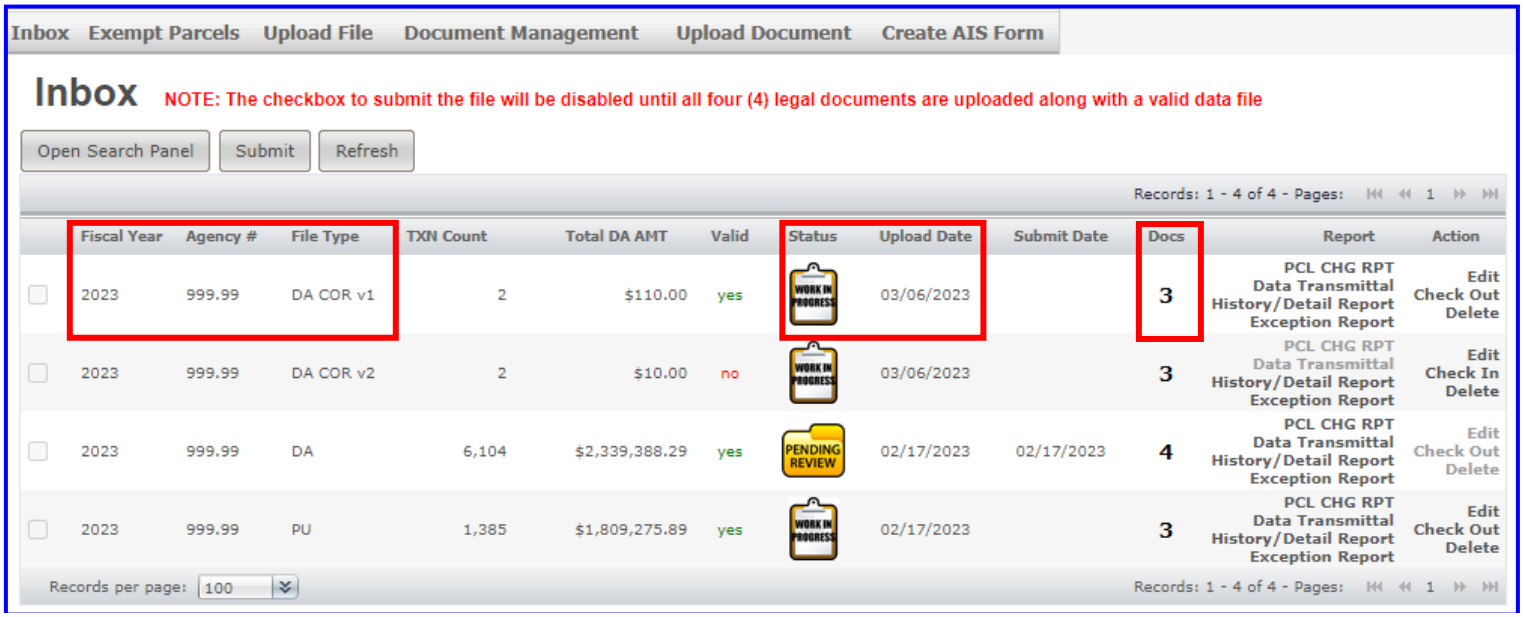


8E. A **message** will pop up under the Upload button after the file loaded successfully. To view the uploaded file(s), click the **Inbox** tab.

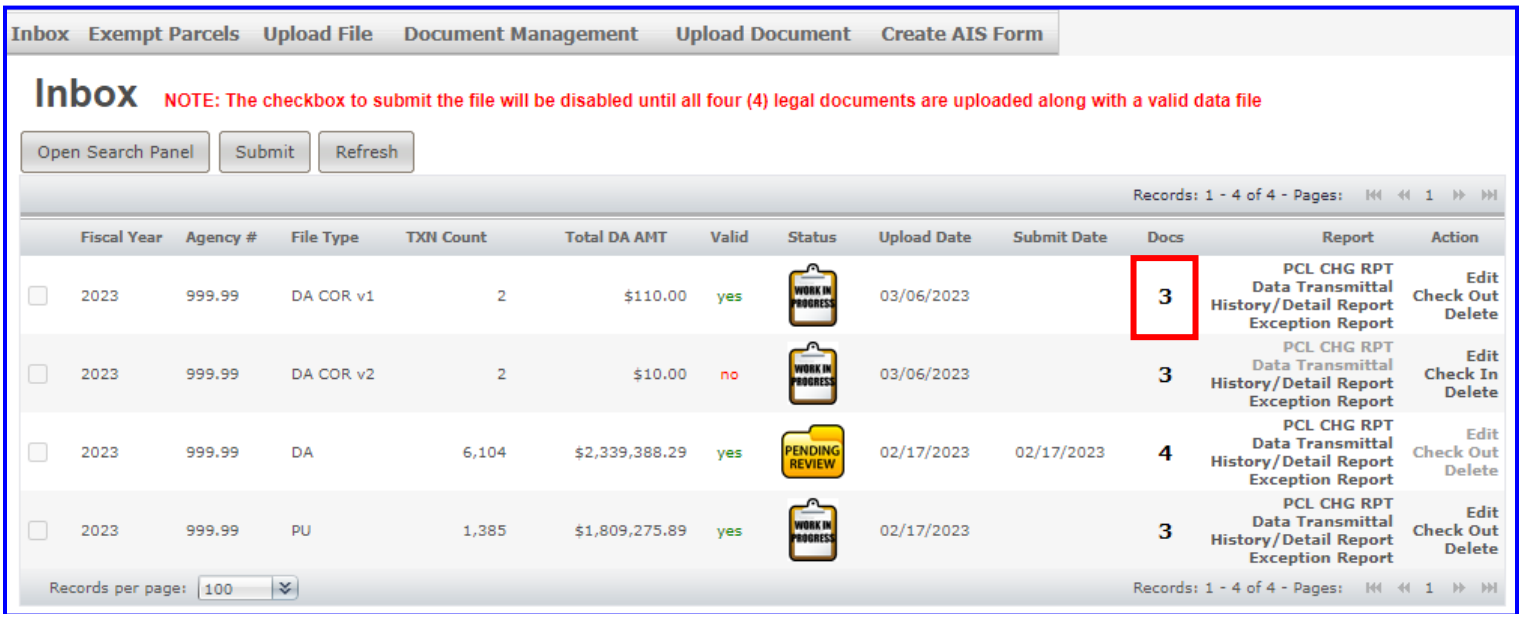
WARNING: Only one correction file per Agency number should be submitted before each Wednesday and Saturday STR Update.

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 **'<u>Correct the Data File in Edit Mode</u>' section (P. 66)**

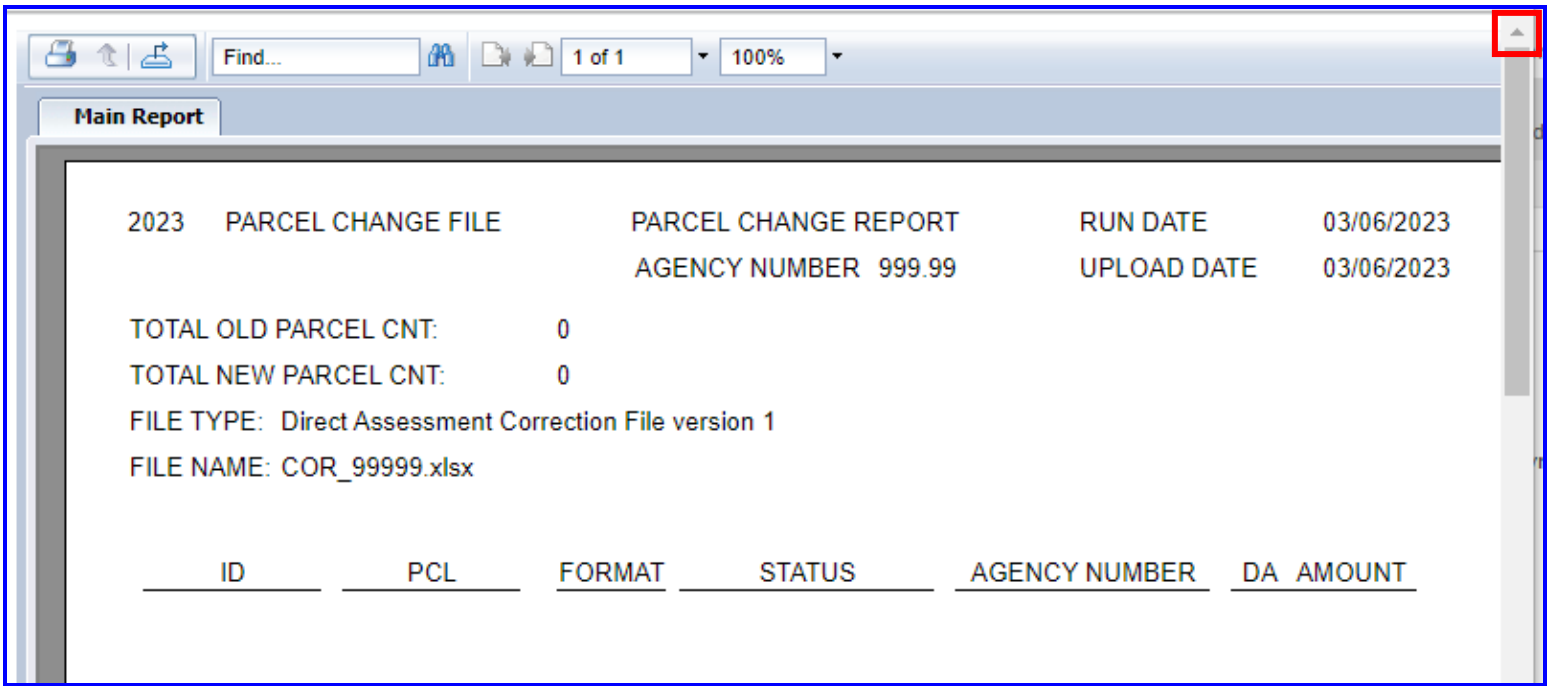
NOTE: The **Billing Agreement**, **Resolution/Ordinance**, **Agency Information Sheet** and **Engineer's/Miscellaneous report** documents **<u>do not need to be re-uploaded</u>** since they were already uploaded to the original D.A. or P.U. files. These documents will be automatically linked to the COR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



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



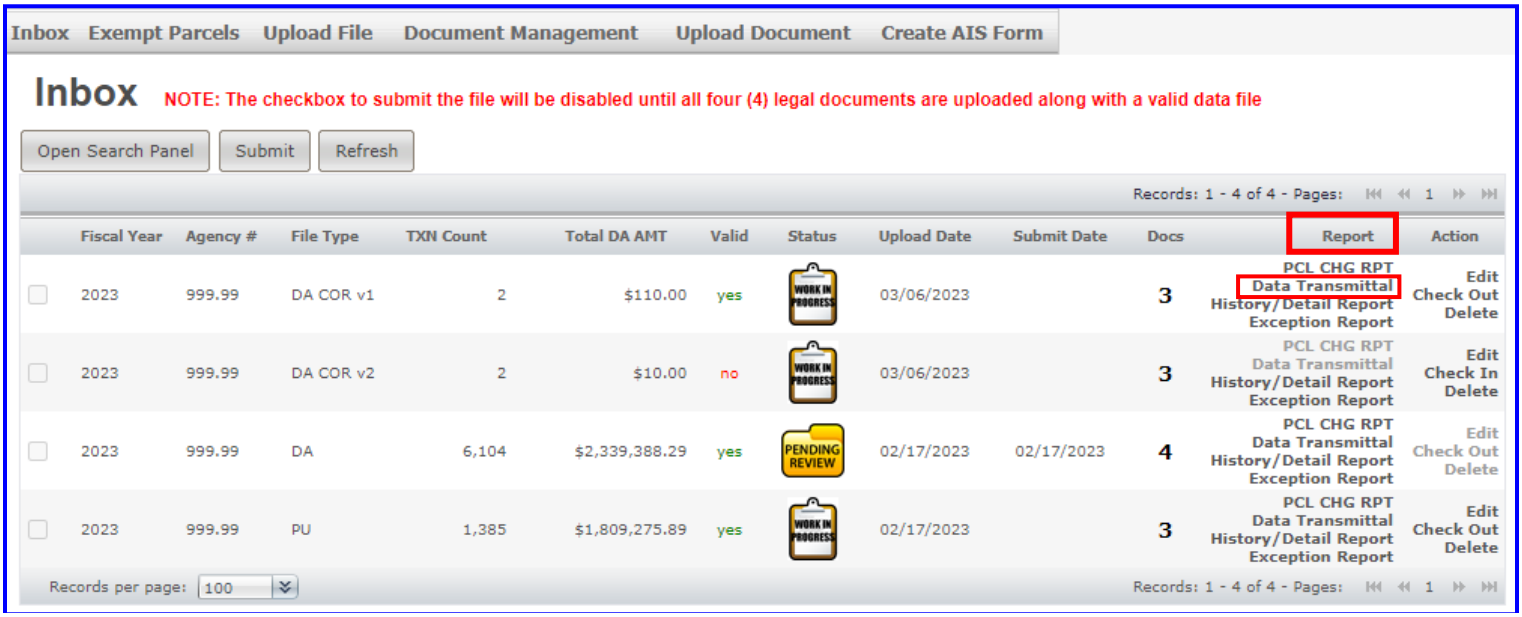
8H. A blank Parcel Change Report means that there are no parcel changes for the respective agency. Click the 'X' to close the report window and proceed to the next step.



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

• Delete the current file from the Inbox and re-upload new file with parcel changes included in the file	Go to **Create the Excel Input Data File (P. 33)** or **Create the Text Input Data File (P. 42)**
• Add new parcels and delete old parcels in Edit mode	Go to **Correct the Data File in Edit Mode (P. 66)**
• Complete Upload Original DA File process AND • Submit parcel changes as corrections	Go to **Upload Correction File and Correction Data Transmittal (P. 100)**

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



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.

DATE: **March 06, 2023**

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

FILE TYPE:	**Direct Assessment Correction File version 1**
AGENCY ACCOUNT NUMBER:	**999.99**
BILL DESCRIPTION:	**LA County Test**
TOTAL ASSESSMENT AMOUNT:	**$110.00**
TOTAL PARCEL COUNT:	**2**

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).

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: _____

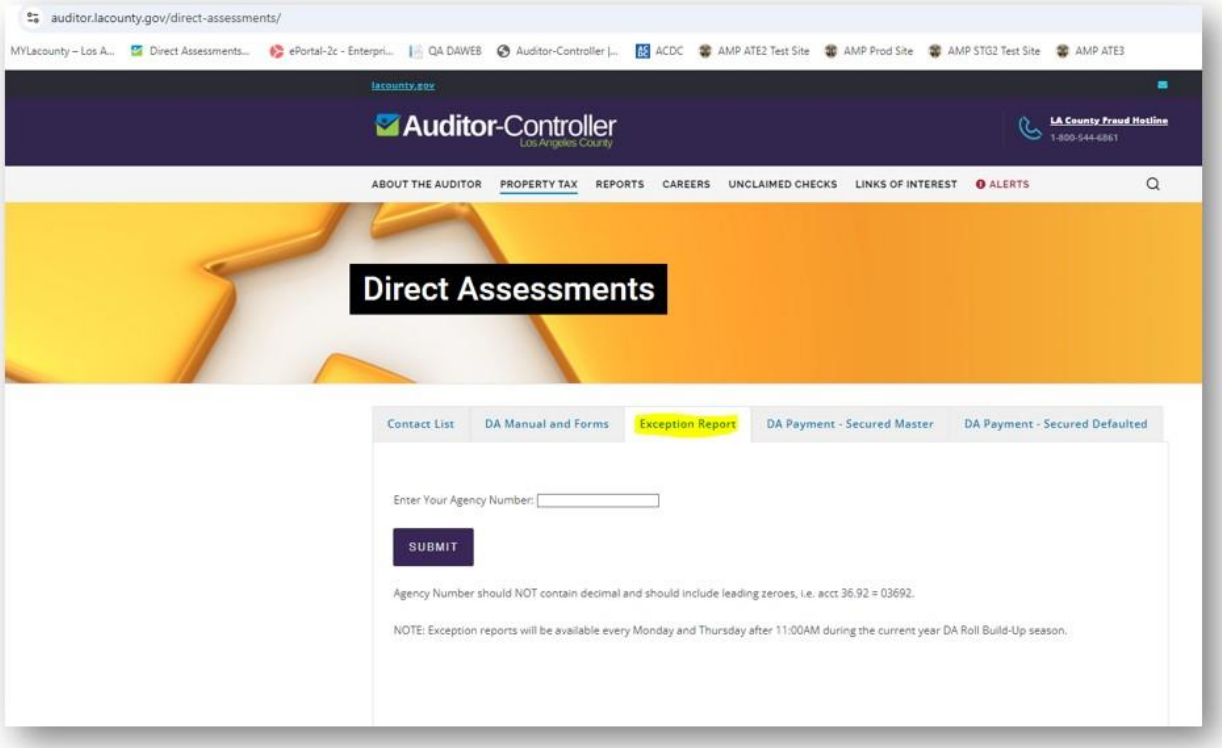
Phone Number: _____

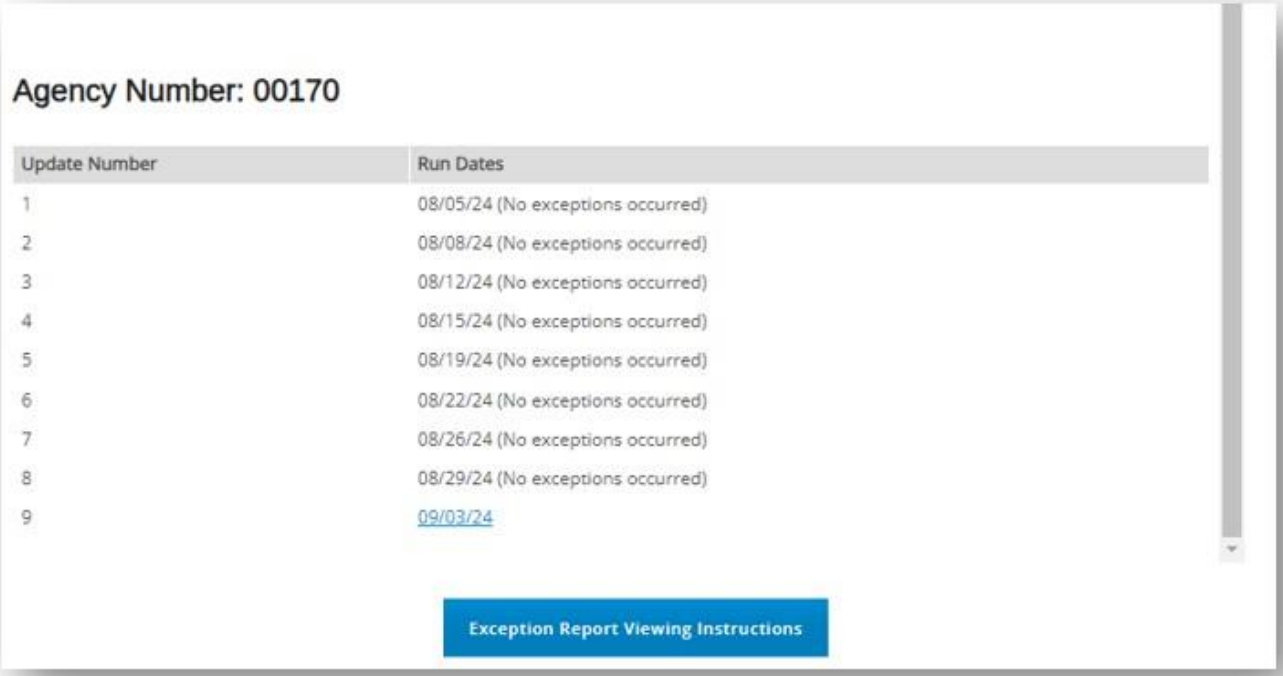
Email Address: _____

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

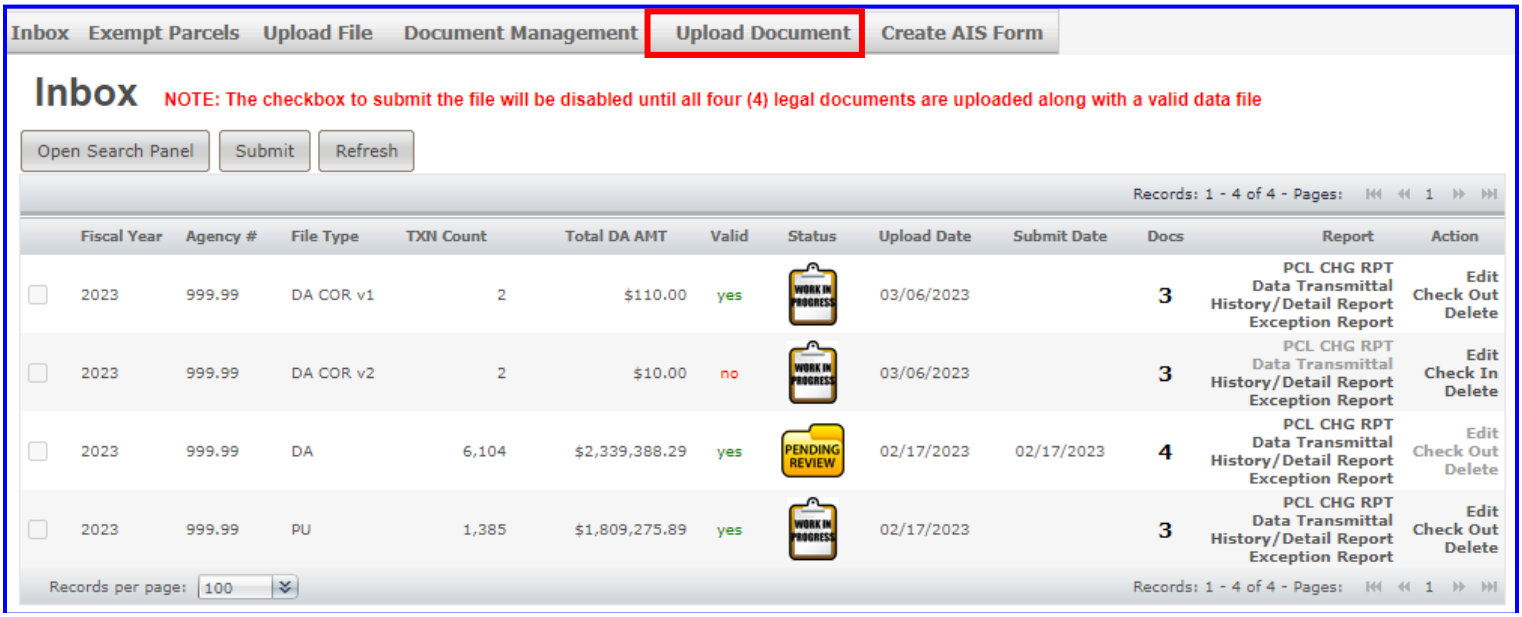
8K. To Access the Exception Reports, click the **Exception Report** tab under Report.

8L. It will direct you to the Auditor Controller Direct Assessments website. You can then click on the Exception Report tab and lookup your account.





8M. To upload the Data Transmittal, click the **<u>Upload Document</u>** tab.

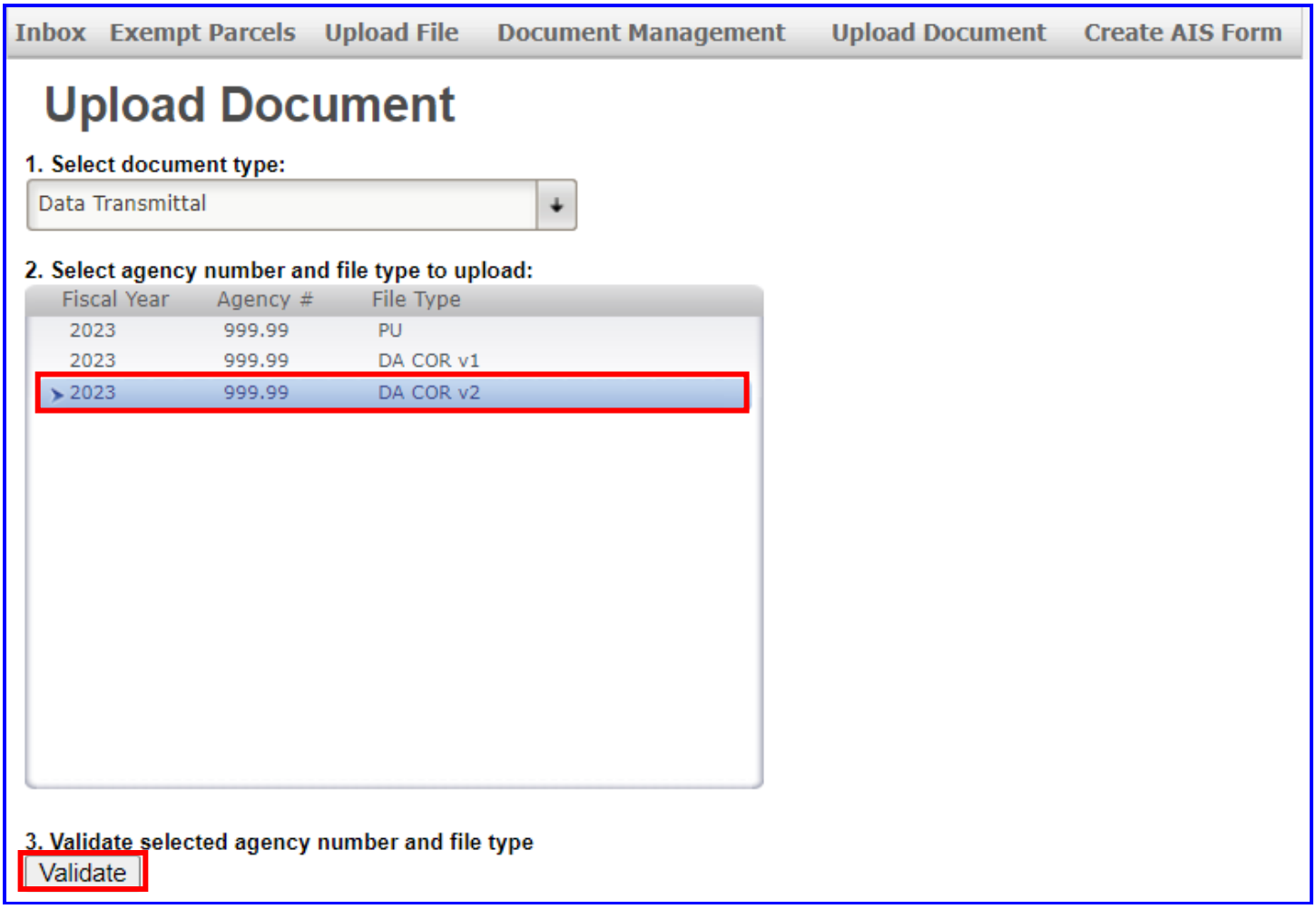


8N. Under step 1, click the '**<u>Select document type:</u>**' drop down box and select **Data Transmittal**. Once the document type is selected, steps 2 to 3 will appear on the Upload Document page.

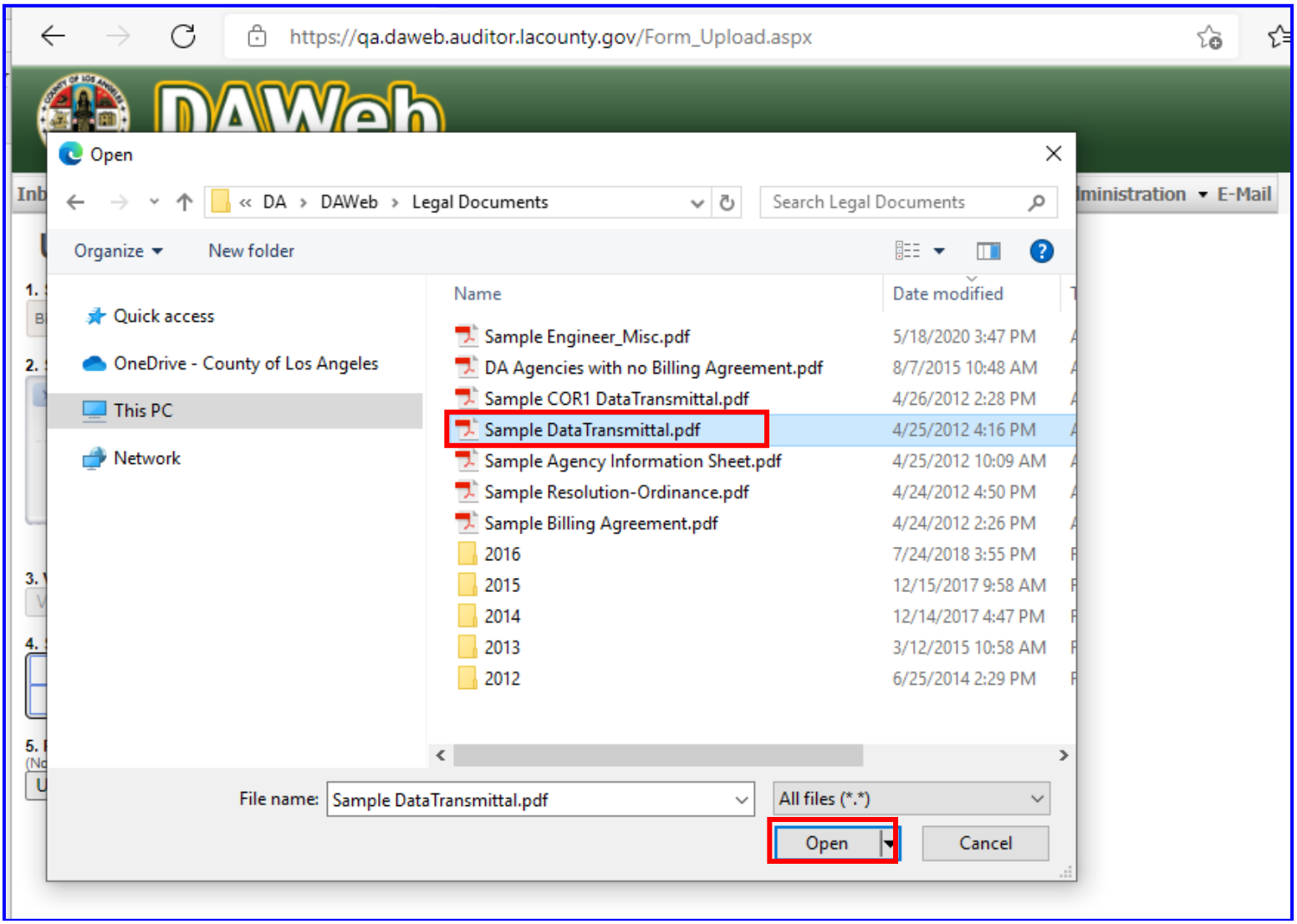
8O. Perform the following steps:

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

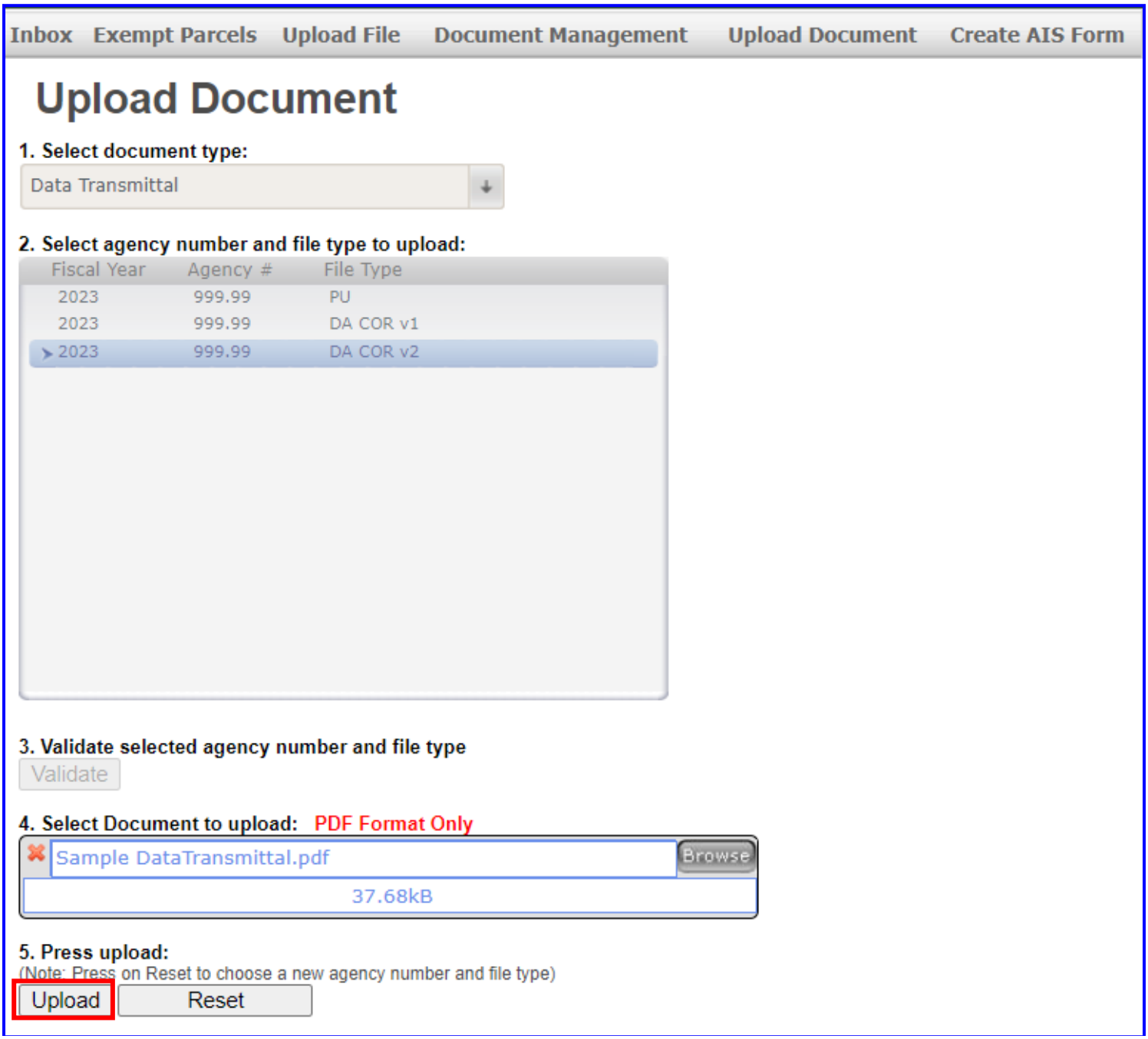
NOTE: Make sure that the agency number and file type on the Data Transmittal matches the agency number and file type you are selecting.



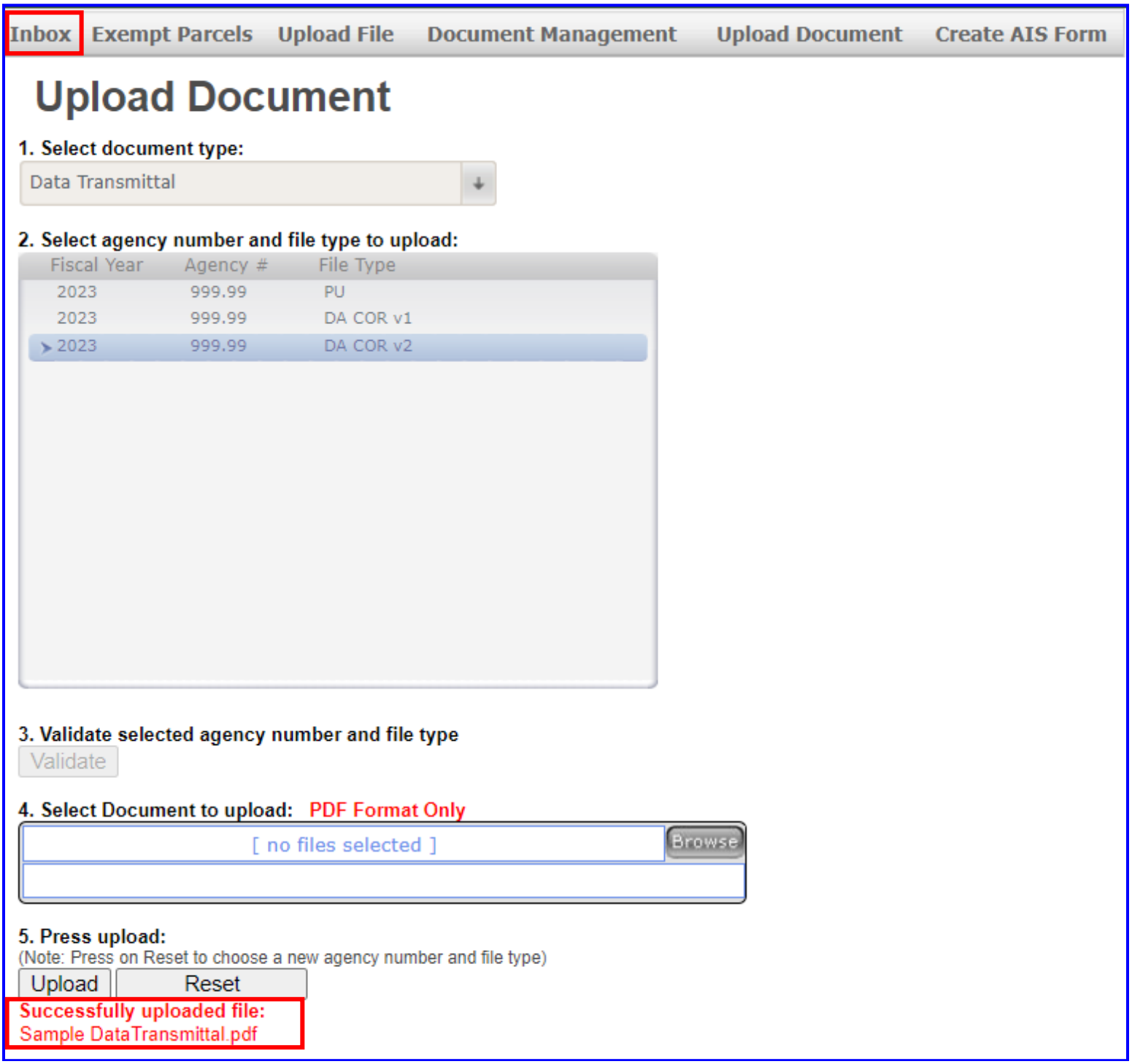
8P. Under **step 4**, click the **Browse** button, select a .PDF document to upload and click the **Open** button or double click the document selected. **Documents must be in .PDF format.**


https://qa.daweb.auditor.lacounty.gov/Form_Upload.aspx
DAWeb
Open
« DA › DAWeb › Legal Documents
Search Legal Documents
Organize
New folder
Quick access
OneDrive - County of Los Angeles
This PC
Network
Name
Date modified
Sample Engineer_Misc.pdf 5/18/2020 3:47 PM
DA Agencies with no Billing Agreement.pdf 8/7/2015 10:48 AM
Sample COR1 DataTransmittal.pdf 4/26/2012 2:28 PM
Sample DataTransmittal.pdf 4/25/2012 4:16 PM
Sample Agency Information Sheet.pdf 4/25/2012 10:09 AM
Sample Resolution-Ordinance.pdf 4/24/2012 4:50 PM
Sample Billing Agreement.pdf 4/24/2012 2:26 PM
2016 7/24/2018 3:55 PM
2015 12/15/2017 9:58 AM
2014 12/14/2017 4:47 PM
2013 3/12/2015 10:58 AM
2012 6/25/2014 2:29 PM
File name: Sample DataTransmittal.pdf
All files (*.*)
Open
Cancel
Administration
E-Mail

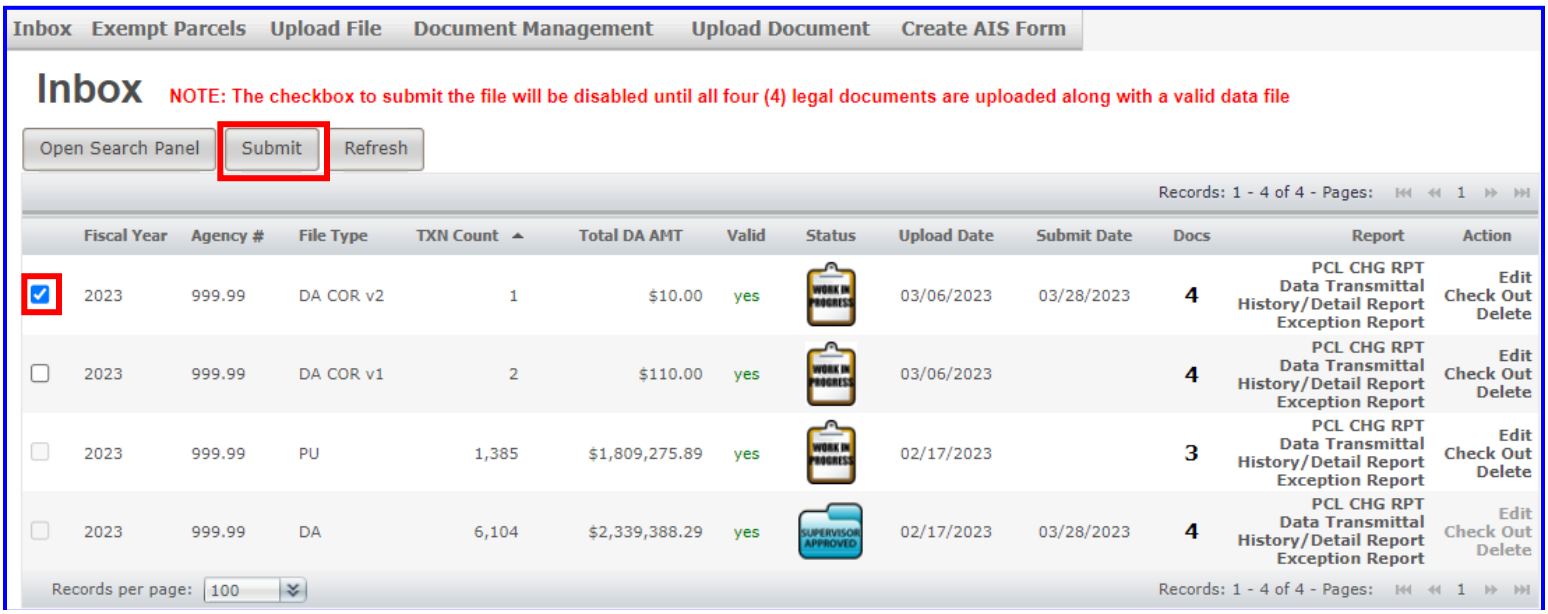
8Q. Under **step 5**, click the **Upload** button to upload the document to DAWeb.



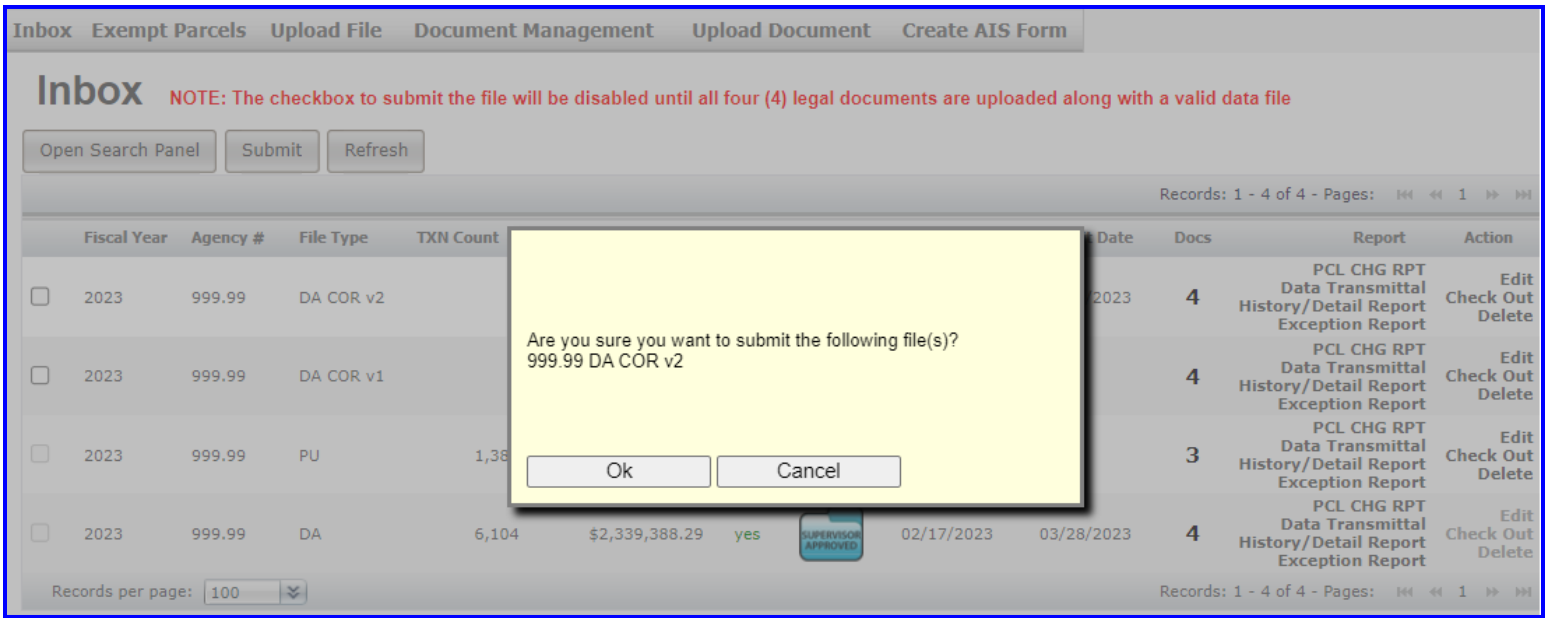
8R. A message will display at the bottom of the page that the file was successfully uploaded. Click the **Inbox** tab to go back to the Inbox.



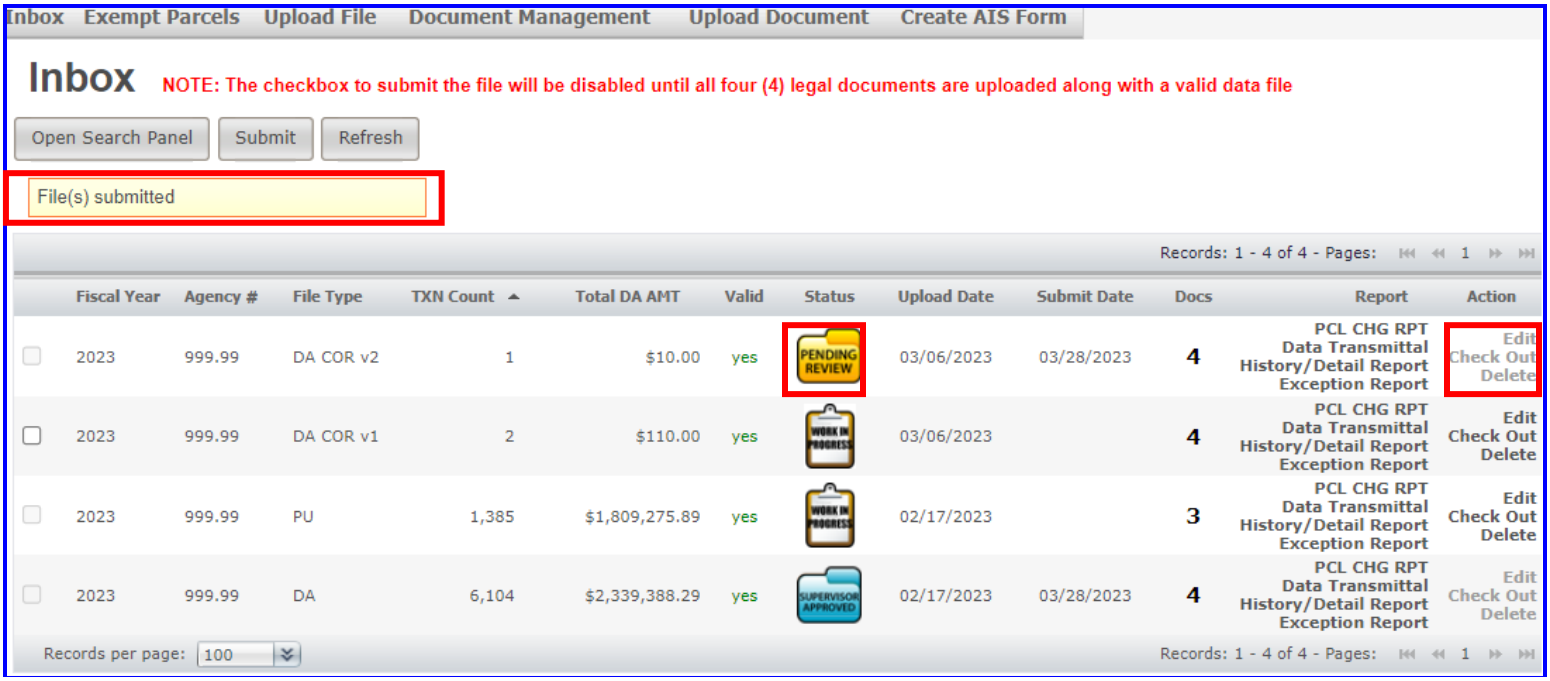
8S. If the file(s) are **Valid = 'yes'** and the document counter under the **Docs** column is equal to **'4'**, then check the checkbox and click the **Submit** button. Multiple files can be checked and submitted simultaneously.



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



8U. 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.



8V. 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.

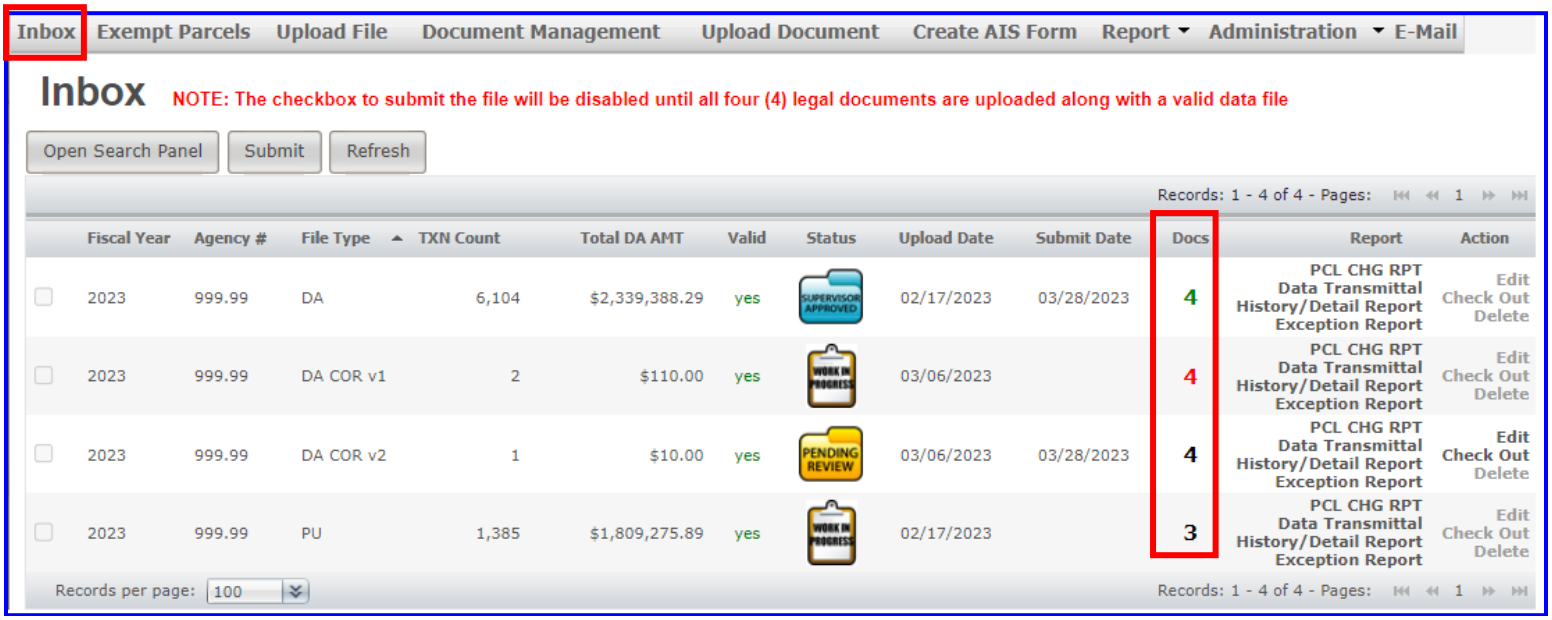
8W. If you receive an email notification saying, "Please note that one or more of your documents have been denied via the DAWeb site,' please review the documents uploaded to see why it was rejected on Document Management and reupload with the correct files as soon as possible (Refer to Section 9: Check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

CHECK THE STATUS OF LEGAL DOCUMENTS

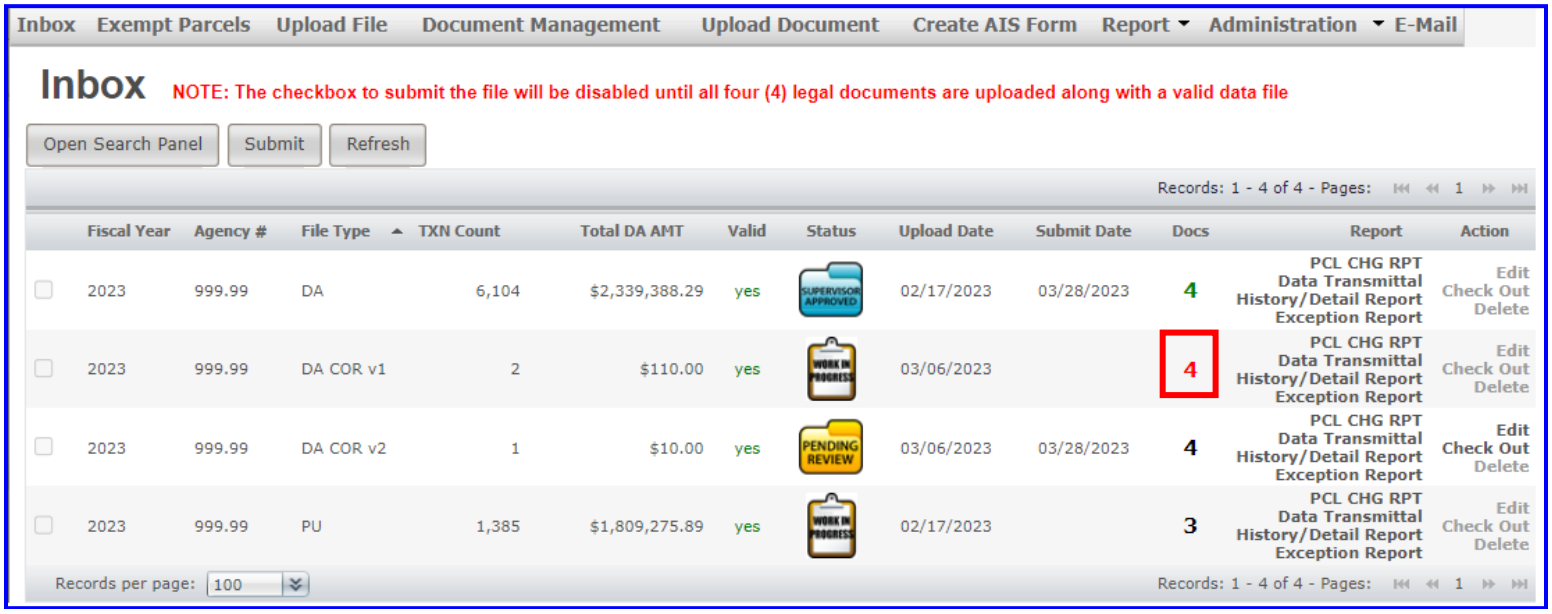
9A. Go to the **Inbox** to check on uploaded documents. Document management can also be used and will be explained in this section (**step 9D, P. 115**).

- 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.



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



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
Agency Information Sheet	Approved		User, Agency	02/17/2023	User, Auditor	03/28/2023
Billing Agreement	Approved		User, Agency	02/17/2023	User, Auditor	03/28/2023
Data Transmittal	Denied	Missing Bill Description	User, Test	03/28/2023	User, Auditor	03/28/2023
Resolution/Ordinance	Approved		User, Agency	02/17/2023	User, Auditor	03/28/2023

Supporting Document

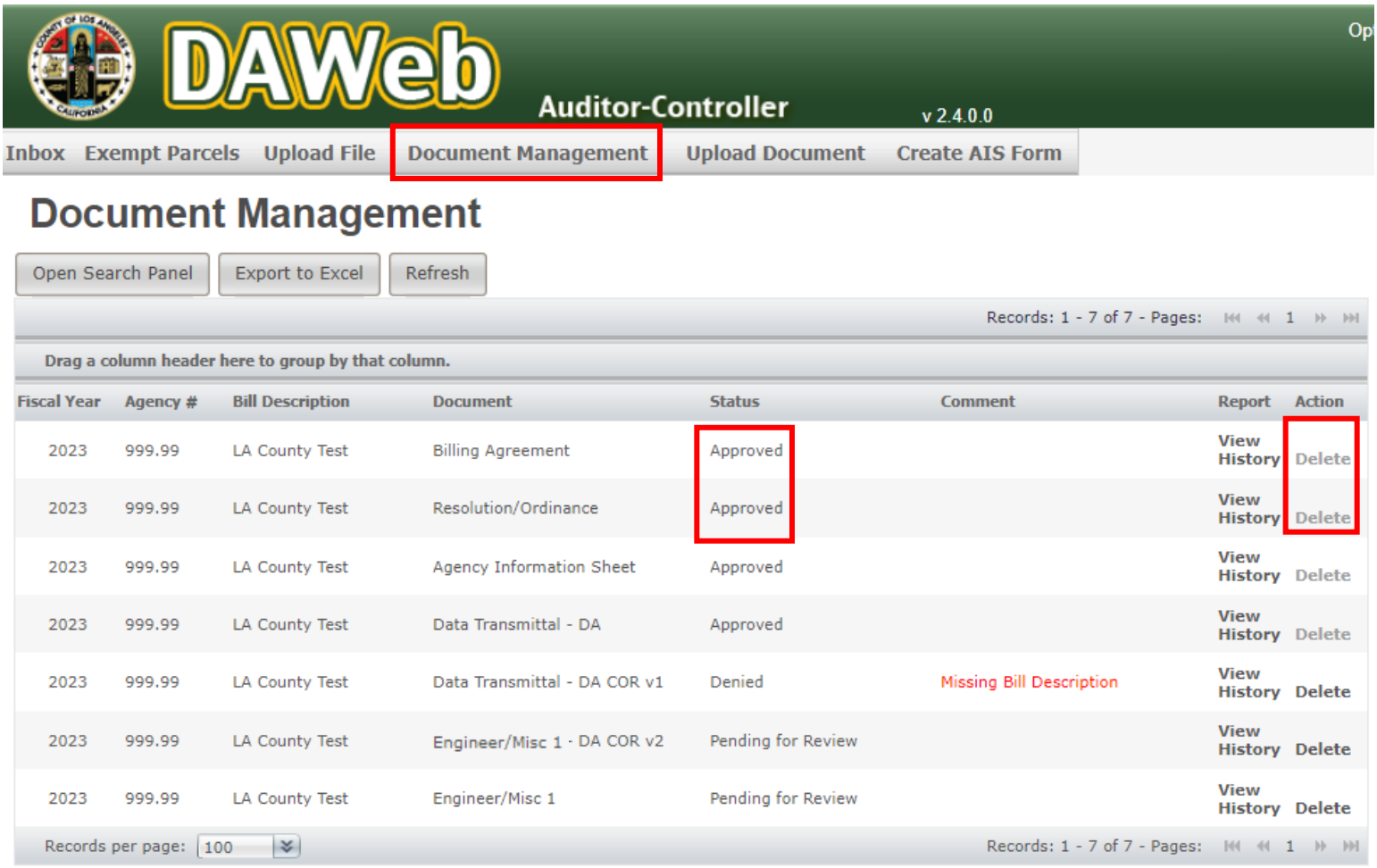
Document Type	Status	Comment	Uploaded By	Uploaded Date	Updated By	Updated Date
Engineer/Misc 1	Pending for Review		User, Auditor	03/28/2023		

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

Document Type	List of the four required legal documents and supporting documents.
Status	**Not Uploaded, Pending Review, Approved, Denied** and **Not Required**. 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.
Comment	Reasons for documents denied by the Auditor.
Uploaded By	Displays the name of the person that uploaded the first document.
Uploaded Date	Displays the date the first document was uploaded.
Updated By	Displays the name of person that last uploaded a later document or updated the status.
Updated Date	Displays the date of the last upload or update.

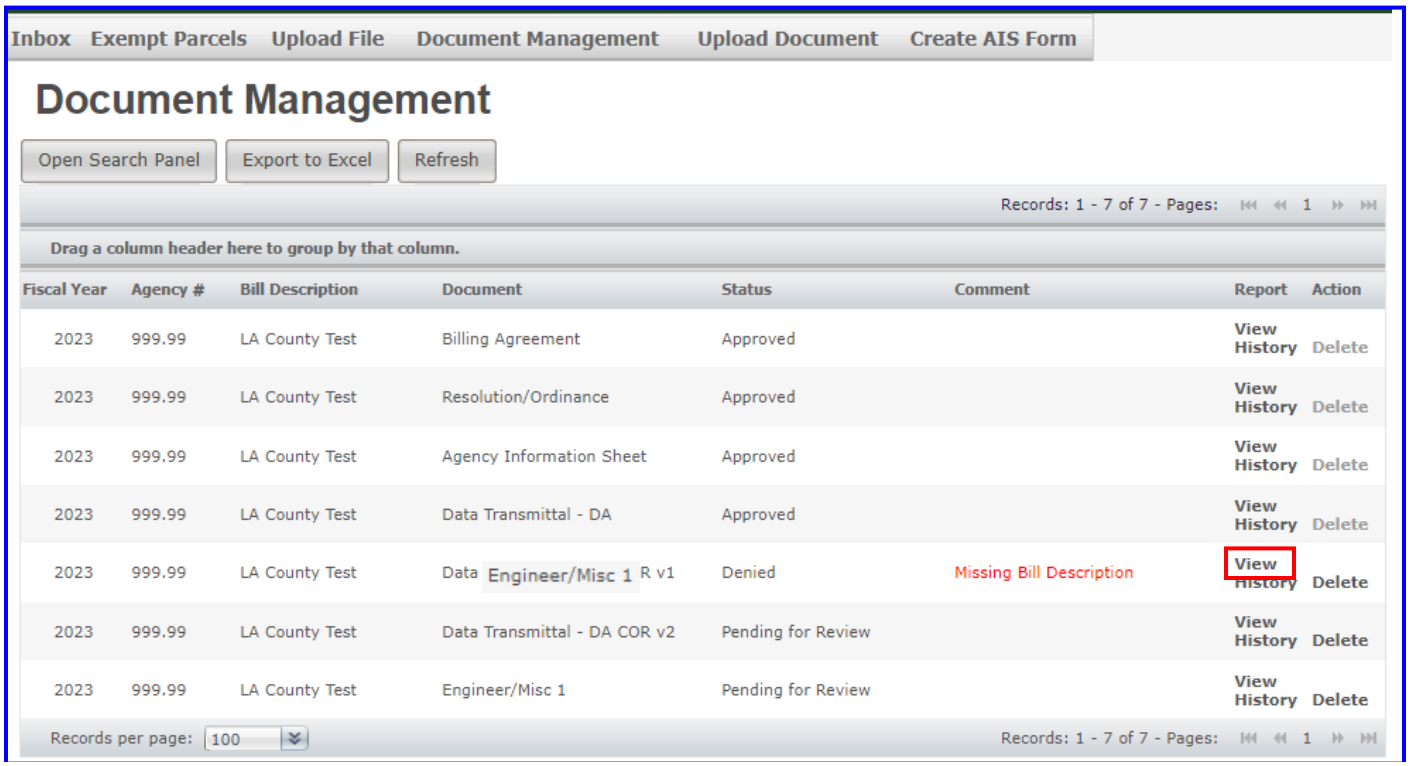
9D. The '**Document Management**' page is another method of checking documents in a list format. The documents are automatically sorted by Agency number. This page has a delete function in case you need to delete and re-upload document(s) that have been denied.

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.

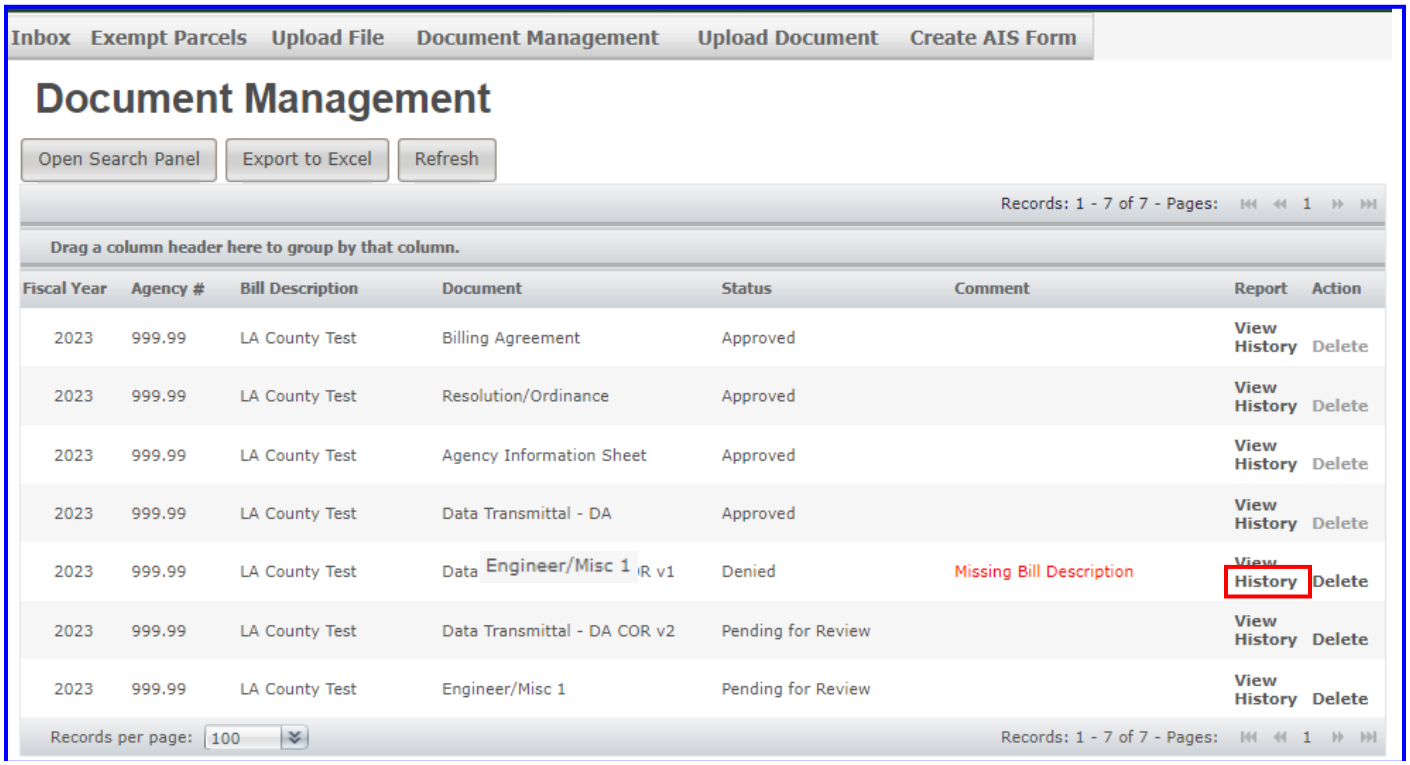


Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
2023	999.99	LA County Test	Billing Agreement	Approved		View History	Delete
2023	999.99	LA County Test	Resolution/Ordinance	Approved		View History	Delete
2023	999.99	LA County Test	Agency Information Sheet	Approved		View History	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

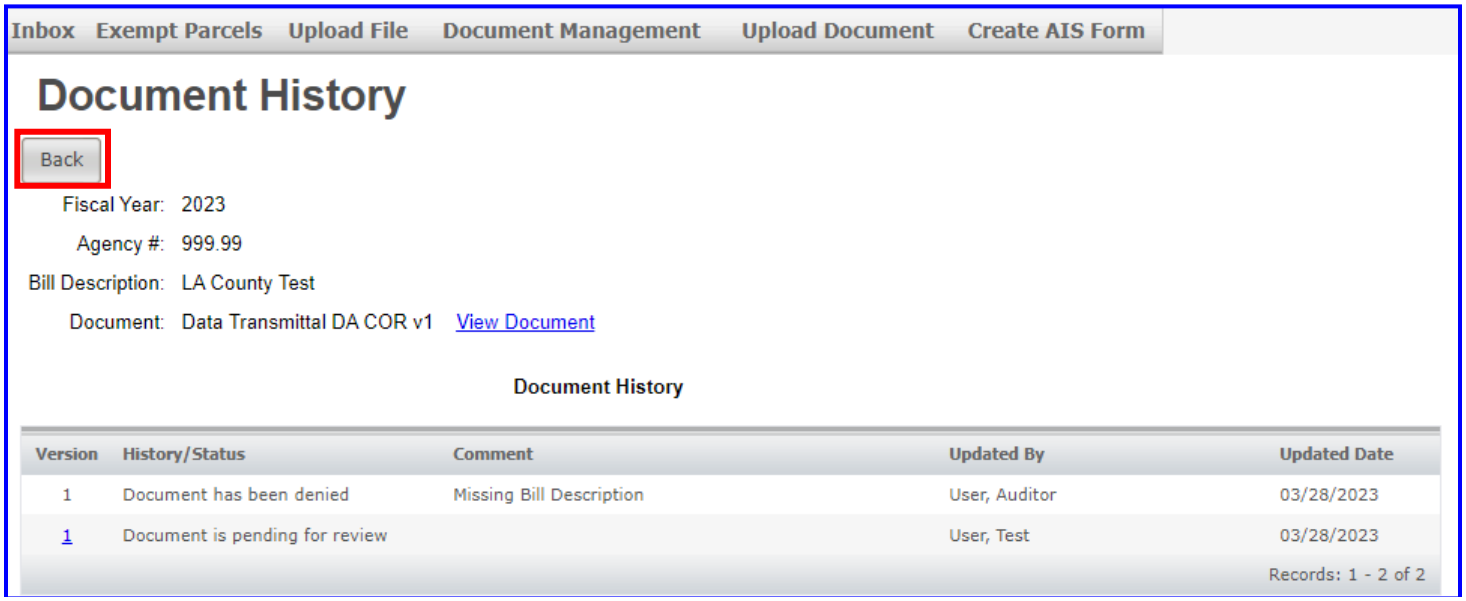
9E. Click the **View** link under the **Report** column link to display the uploaded document.



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

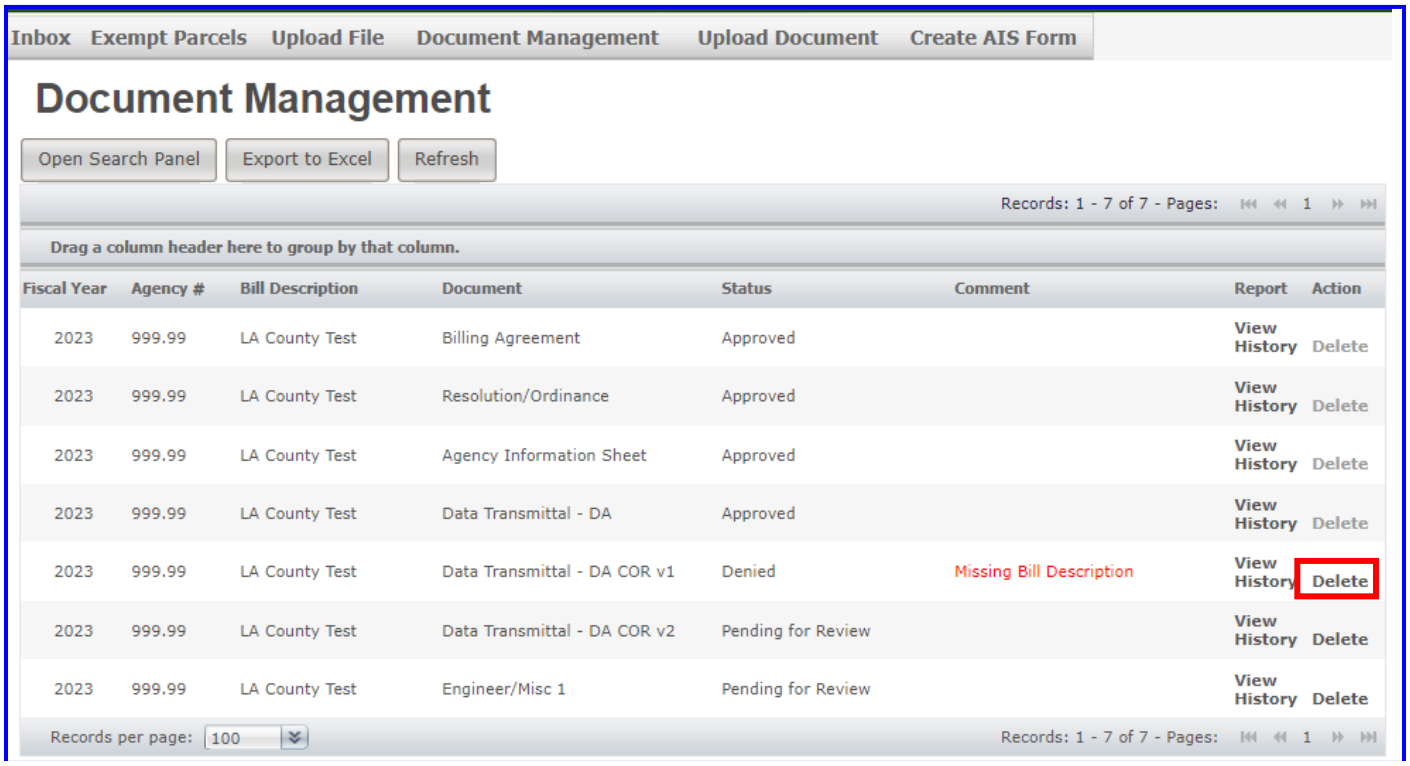


9G. Shown below is the **Document History** page. To go back to the Document Management page, click the **Back** button.

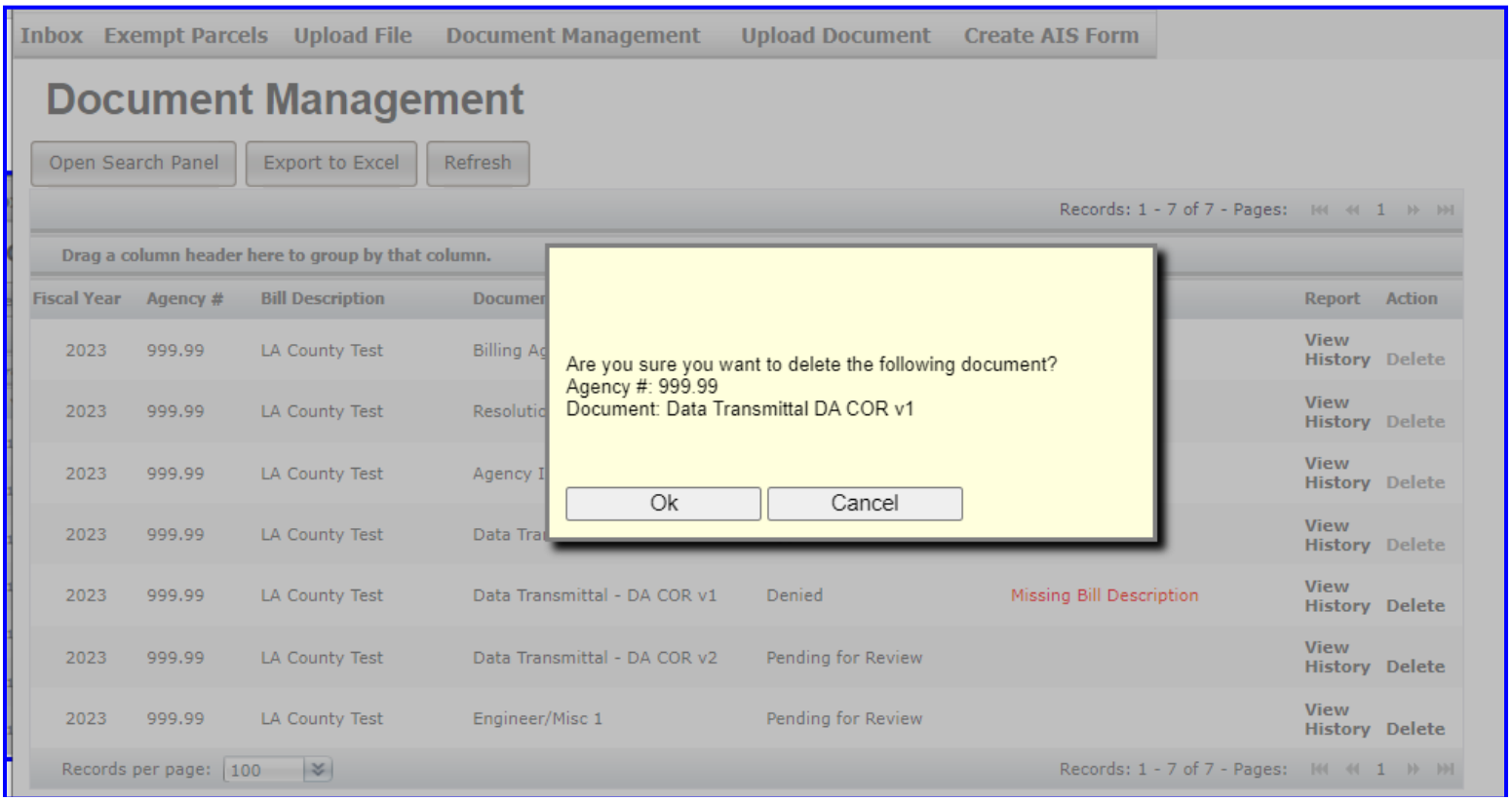


9H. To delete a document with a **'Denied'** or **'Pending Review'** status, click the **Delete** link.

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.



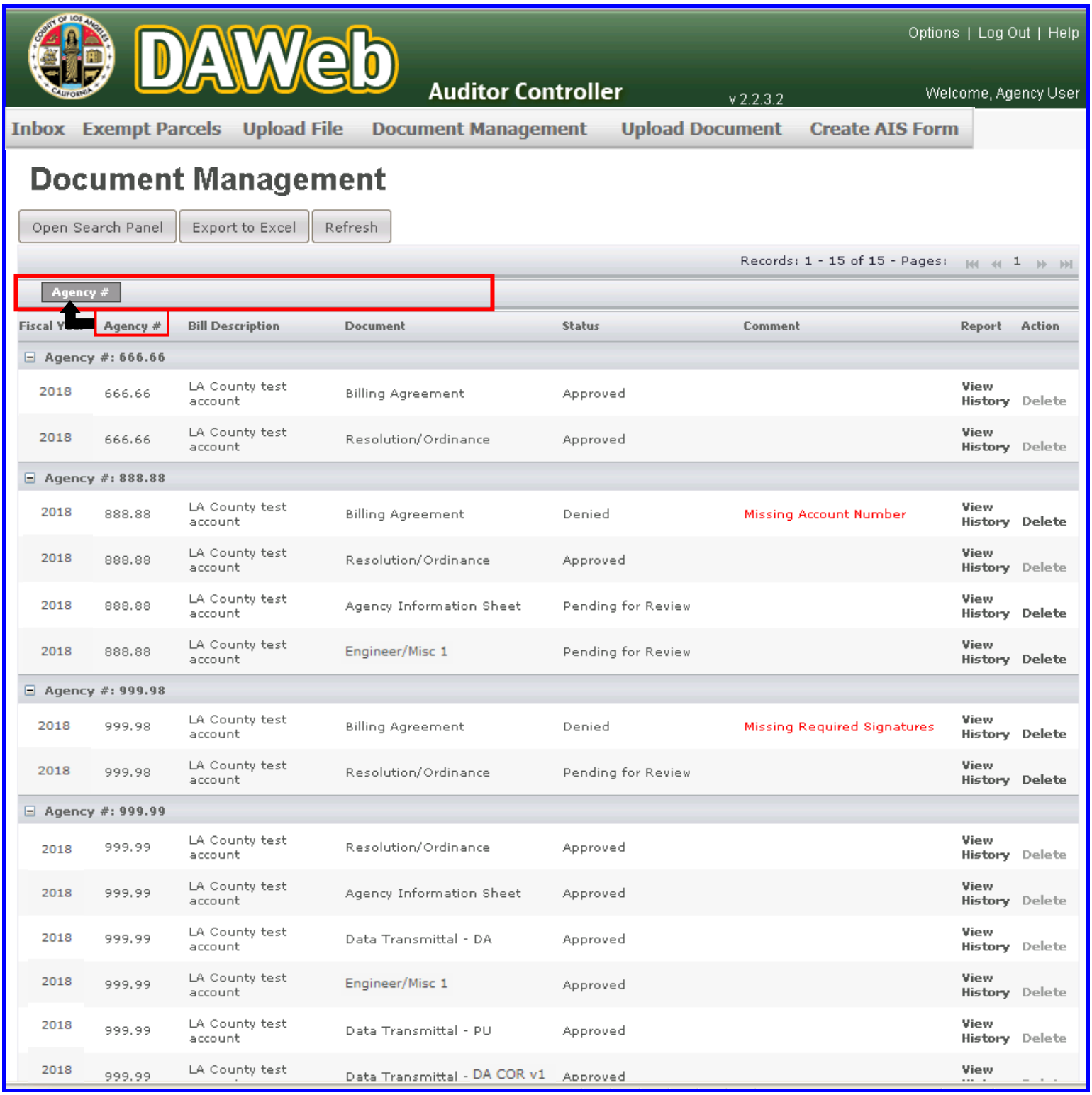
9I. A pop-up message will appear to confirm the delete. Click **OK** or **Cancel**.



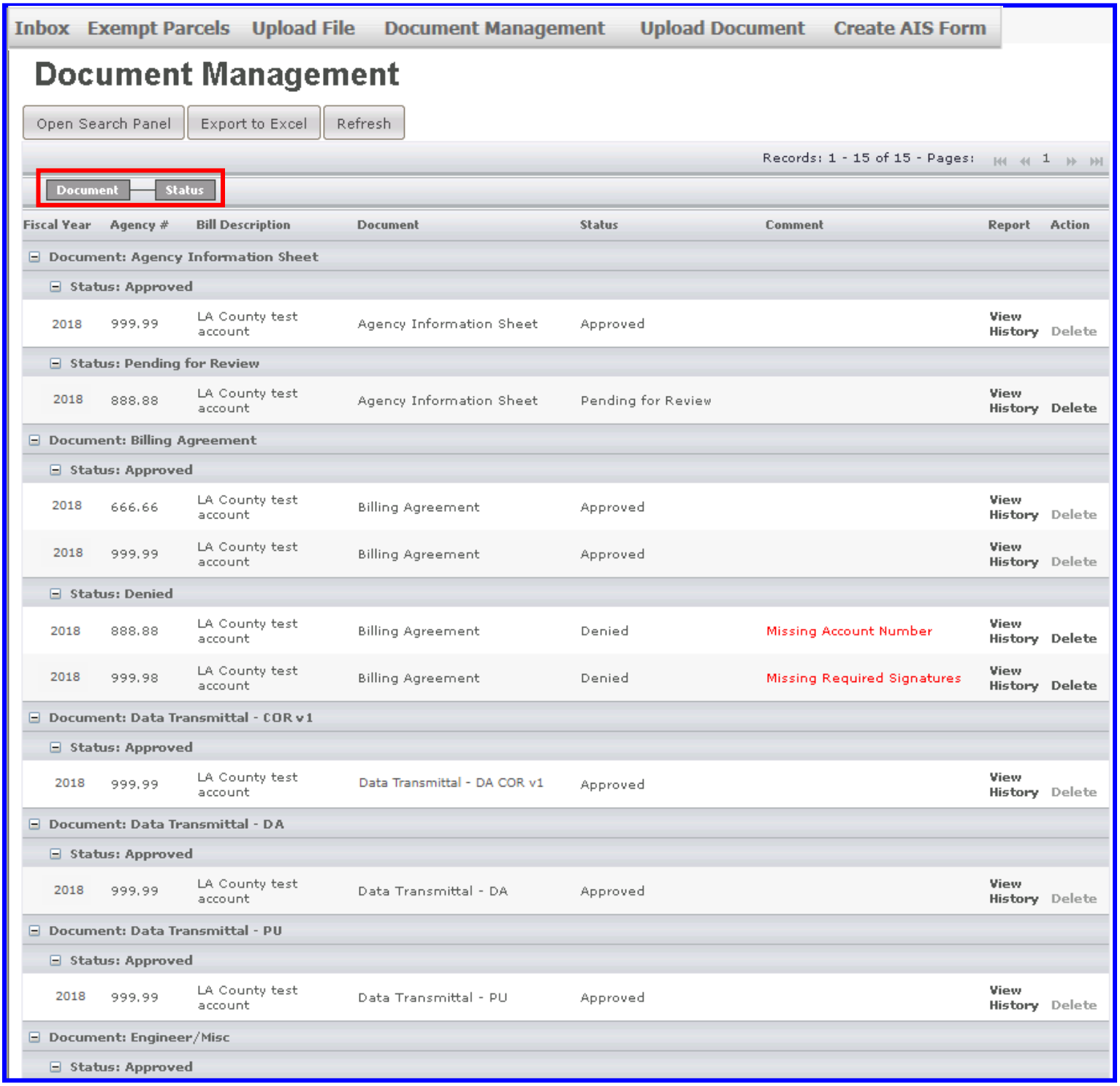
9J. The Data Transmittal for agency number 999.99 has been deleted from the list. **Upload a corrected document.**

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.**

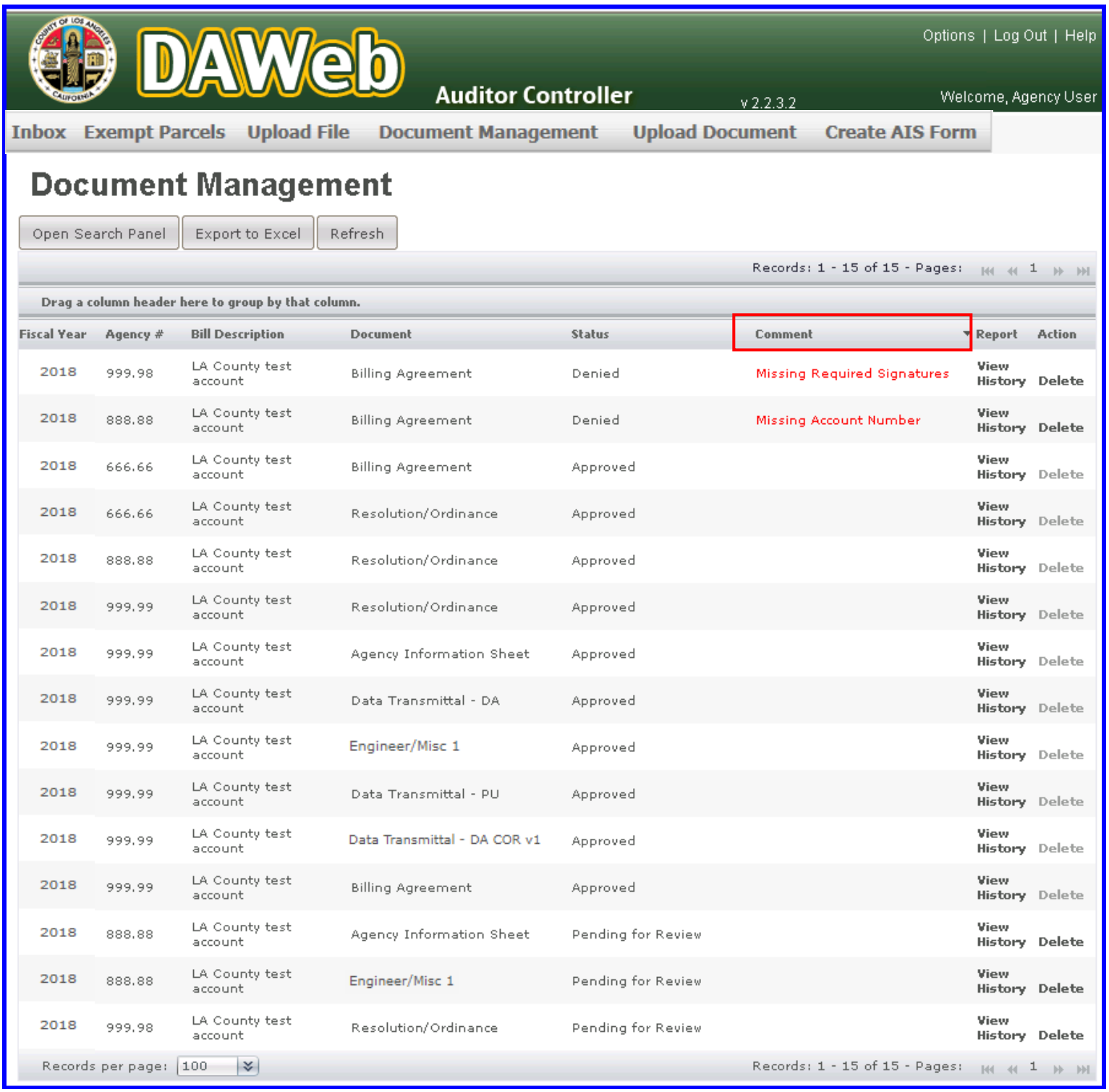
NOTE: The **Comment**, **Report** and **Action** headers cannot be dragged to the top.



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.

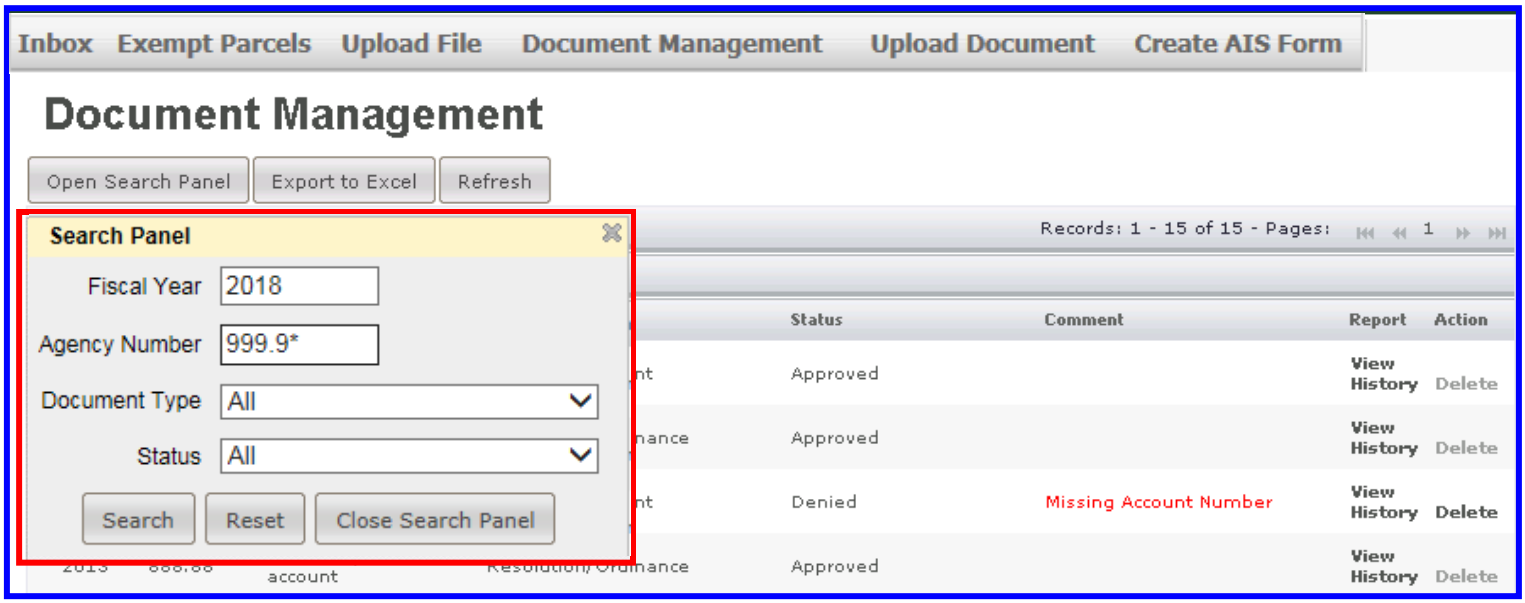


9M. Click the **Comment** header twice to sort all denied documents to the top of the list. This is a useful way to group all documents that you need to delete and re-upload.

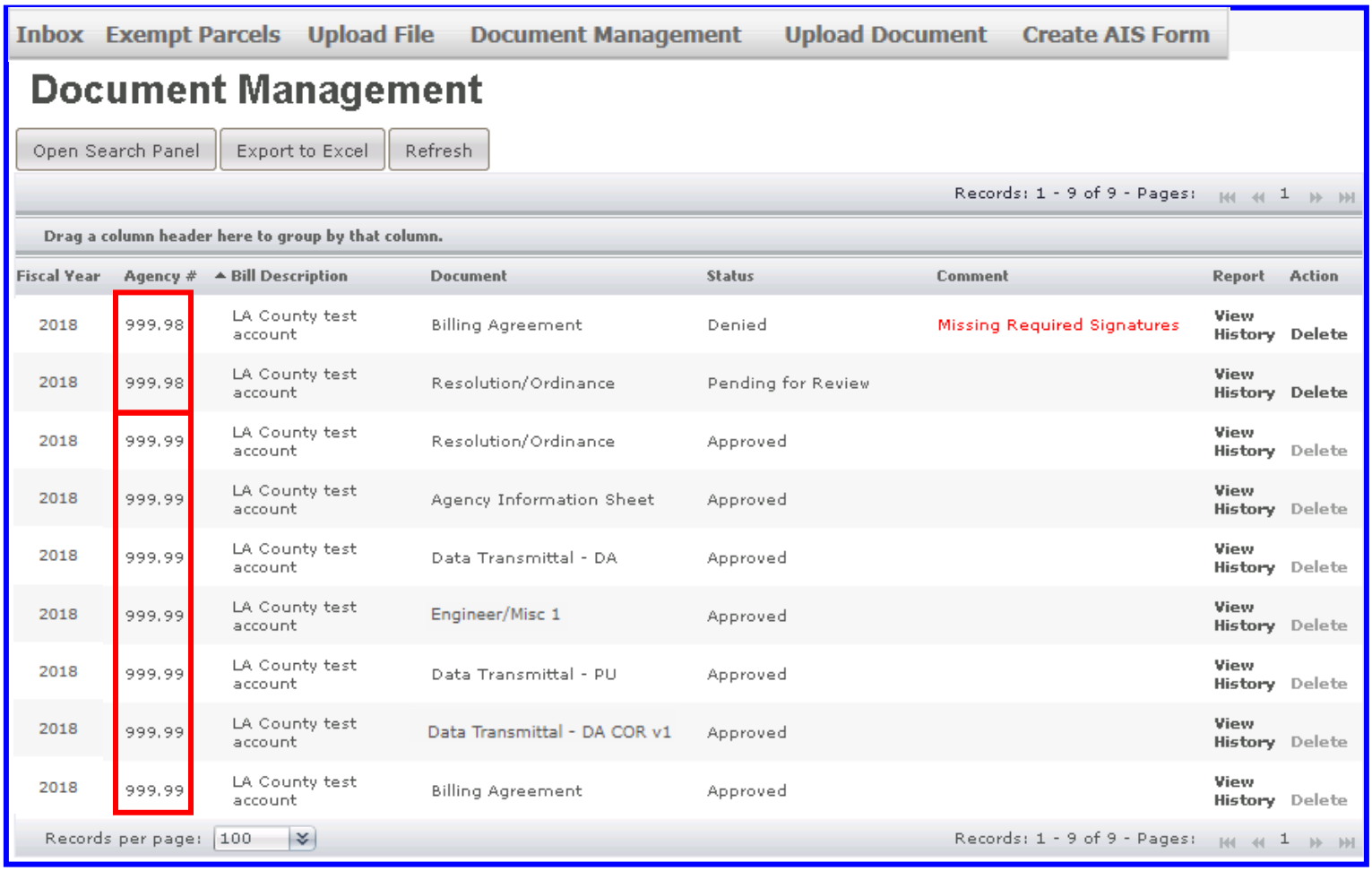


Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
2018	999.98	LA County test account	Billing Agreement	Denied	Missing Required Signatures	View History	Delete
2018	888.88	LA County test account	Billing Agreement	Denied	Missing Account Number	View History	Delete
2018	666.66	LA 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 **<u>Open Search Panel</u>** button and enter 999.9* in the Agency Number box.

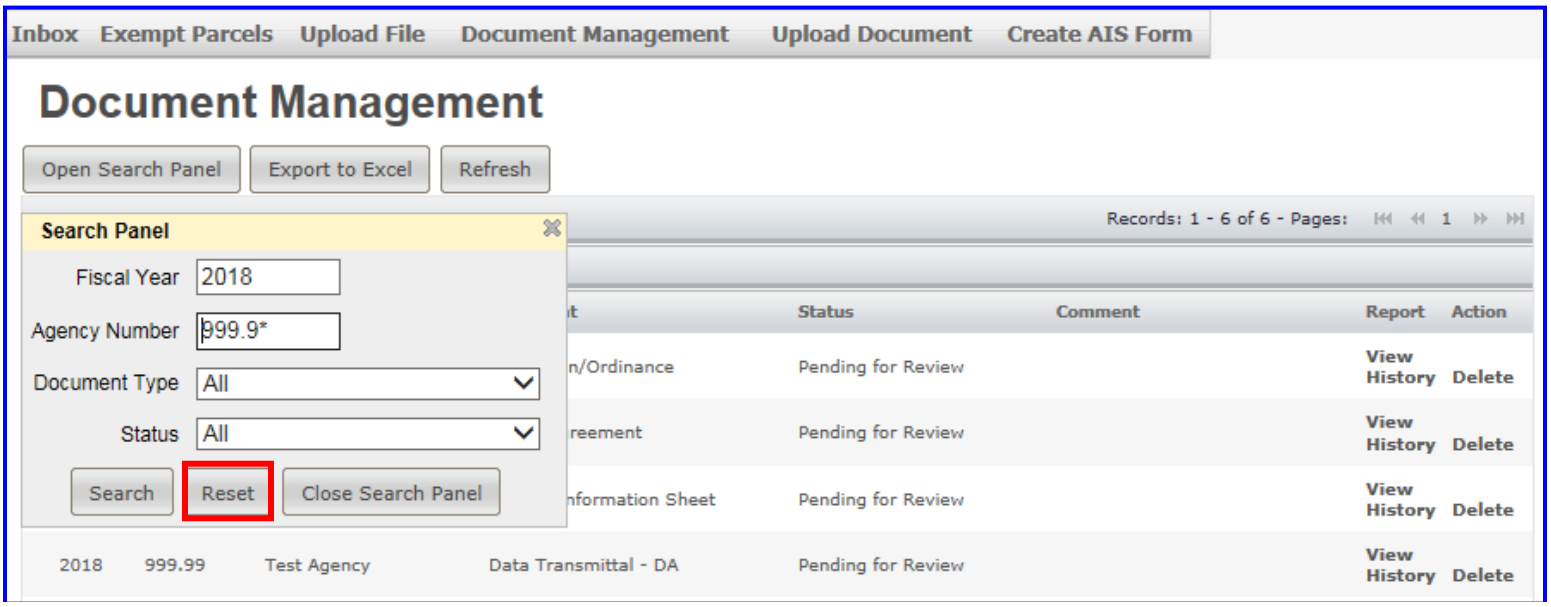


9O. Shown below is the search result for Agency Numbers 999.98 and 999.99.

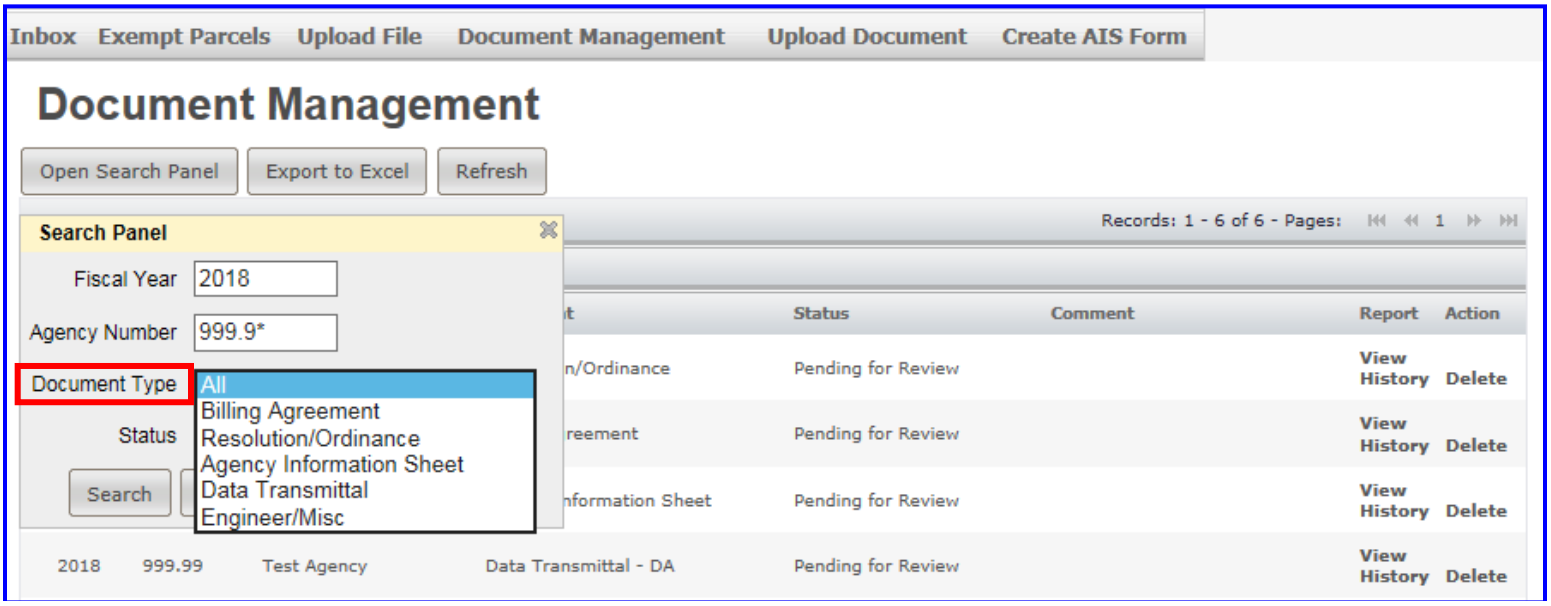


Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
2018	999.98	LA County test account	Billing Agreement	Denied	Missing Required Signatures	View History	Delete
2018	999.98	LA County test account	Resolution/Ordinance	Pending for Review		View History	Delete
2018	999.99	LA County 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

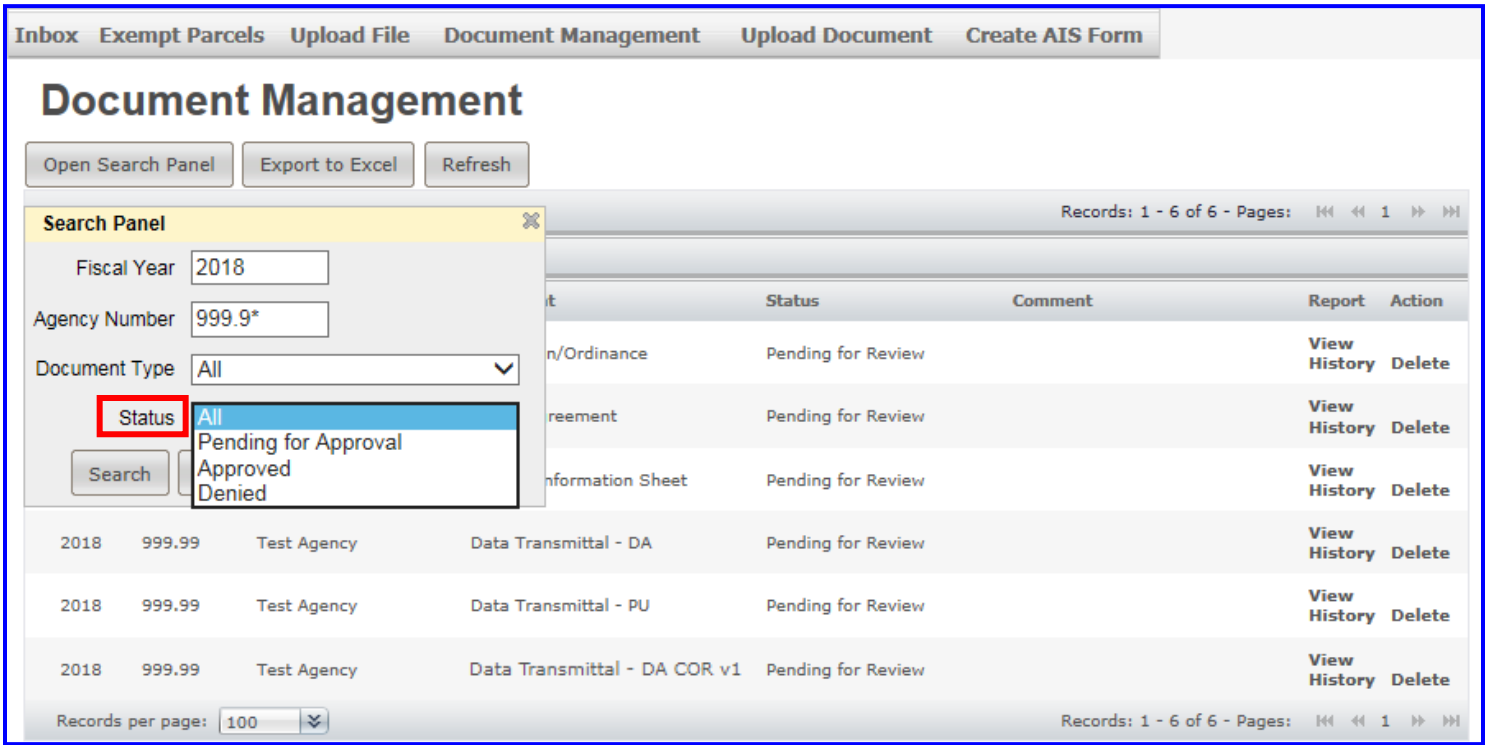
9P. To go back to the full list, click the **Reset** button.



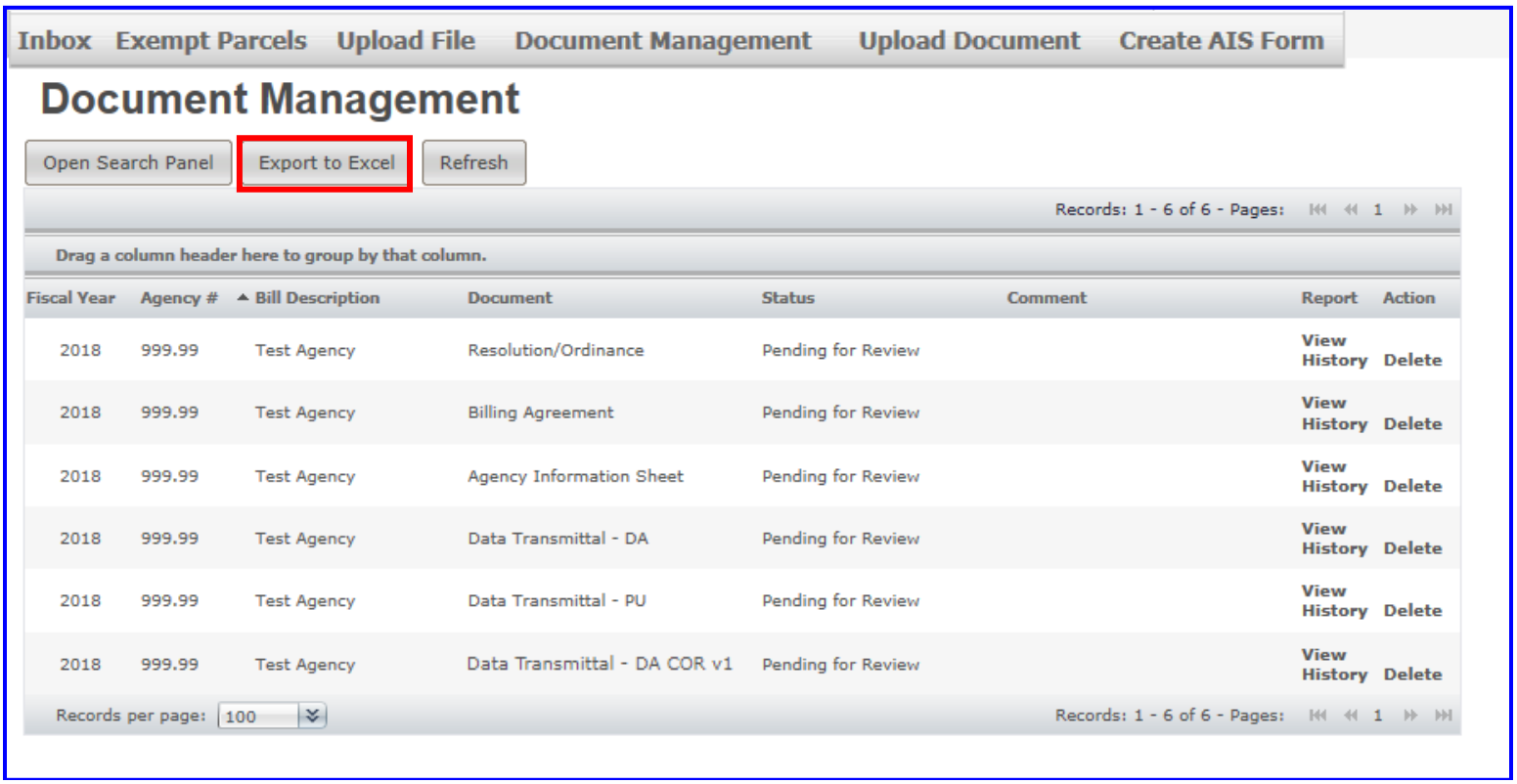
9Q. To search by document type, select the following on the **<u>Document Type</u>** drop down box: **Billing Agreement, Resolution/Ordinance, Agency Information Sheet, Data Transmittal or Engineer/Misc**.



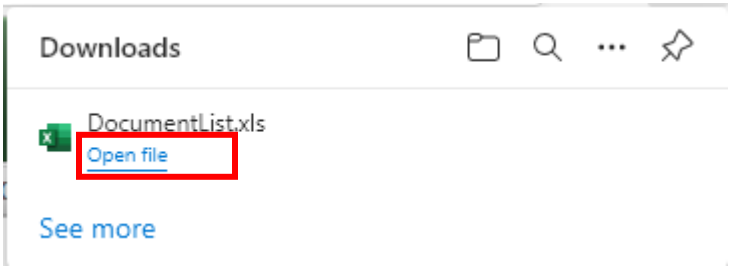
9R. To search by document status, select the following on the **Status** drop down box: **Pending for Approval, Approved or Denied**.



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

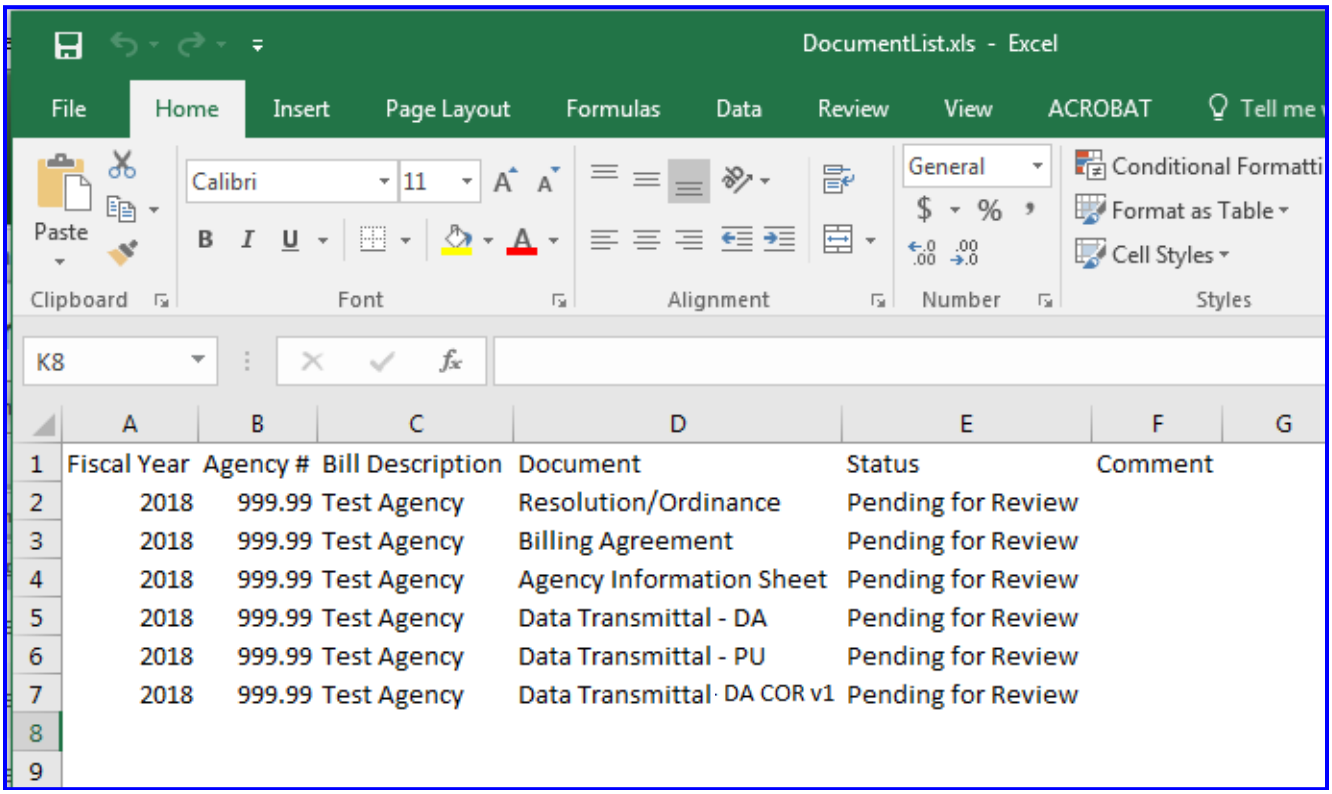


9T. The file will automatically download. Click the **Open file** button in the web browser Downloads folder to view the file.



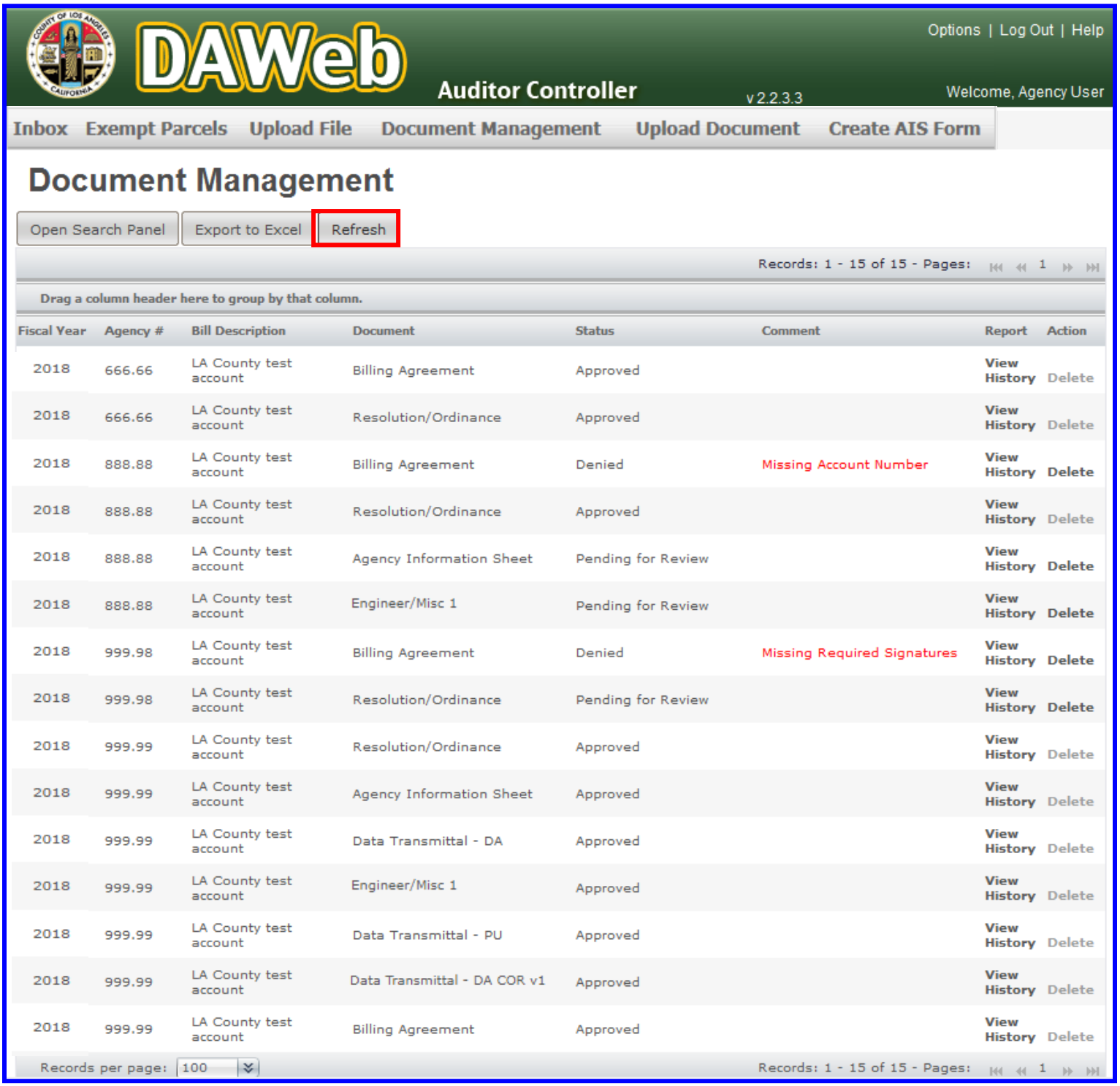
9U. Shown below is the document list in **Excel**.

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



	A	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.



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

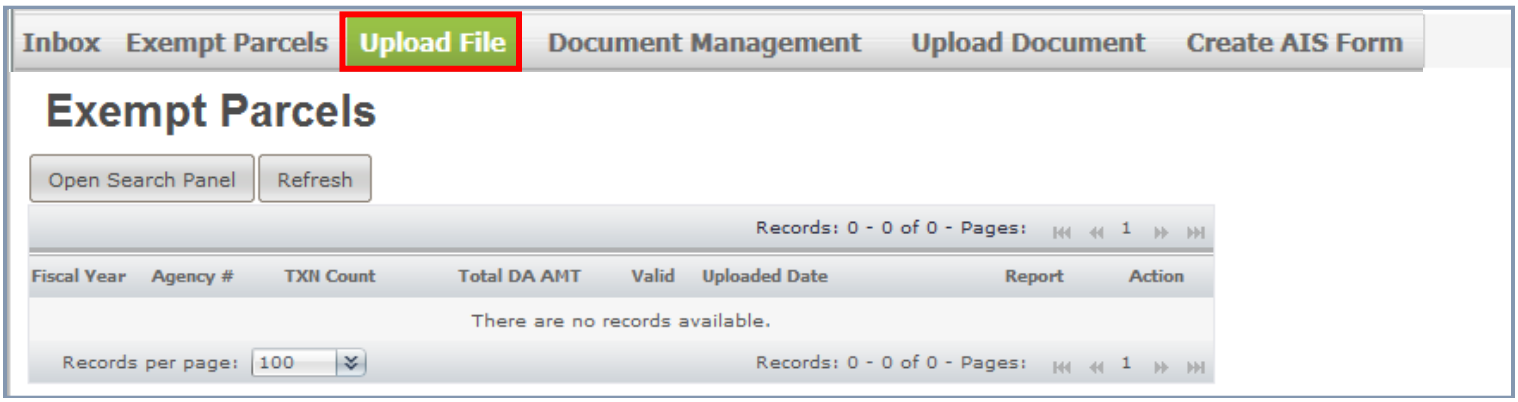
UPLOAD EXEMPT PARCELS FILE

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:

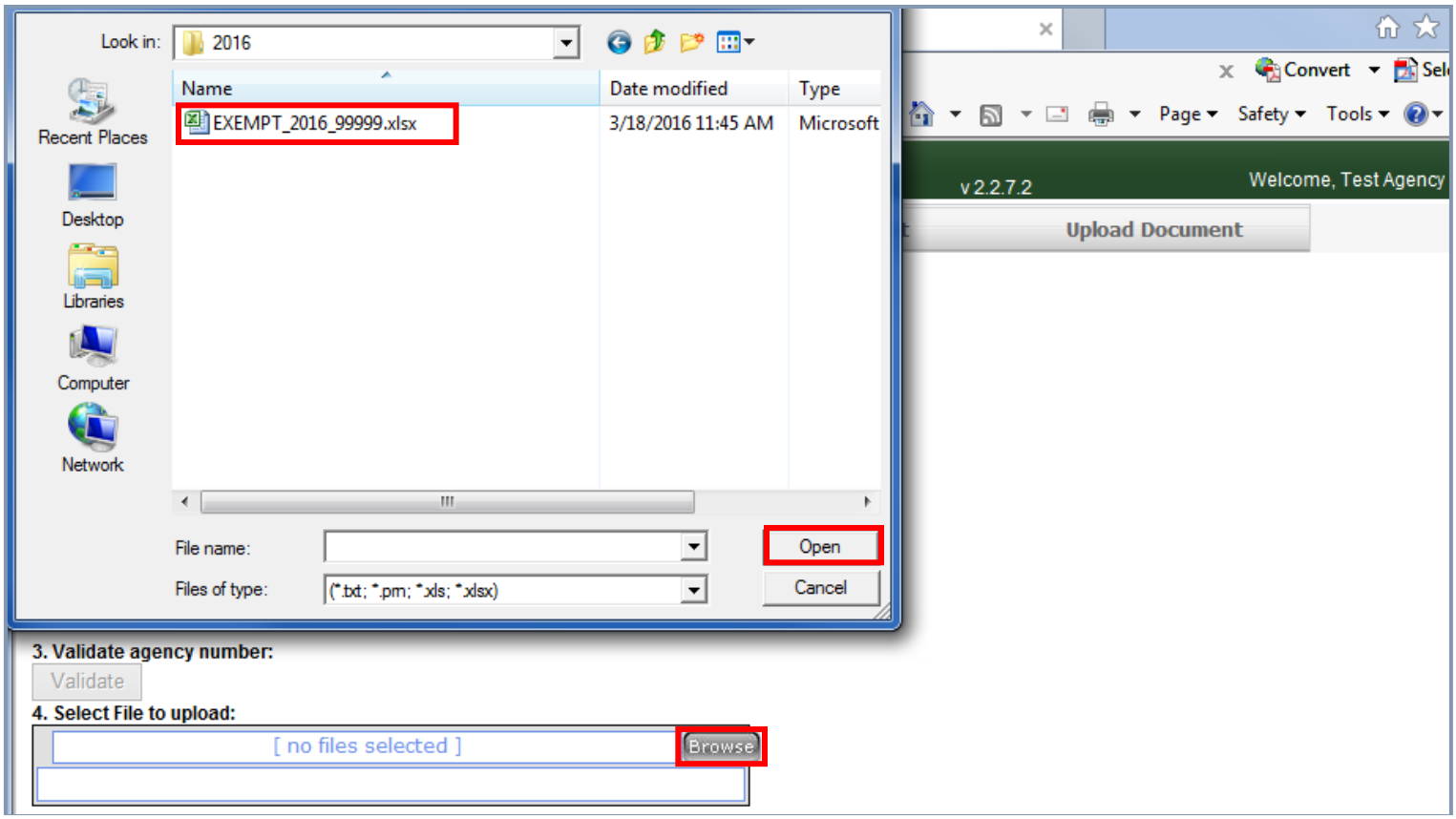
10A. To upload an Exempt Parcels file, click the **Upload File** tab.



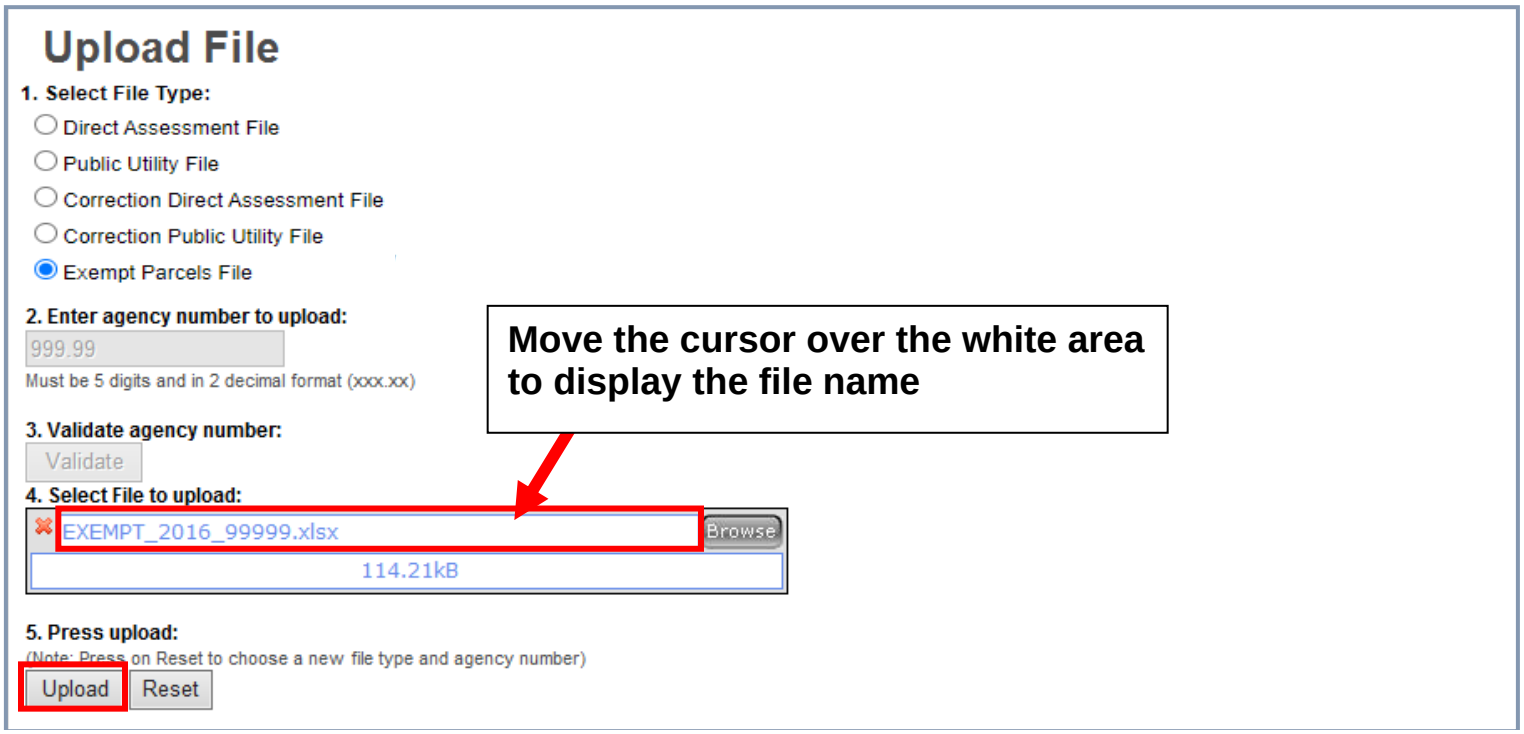
10B. Perform the following upload steps:

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.

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.

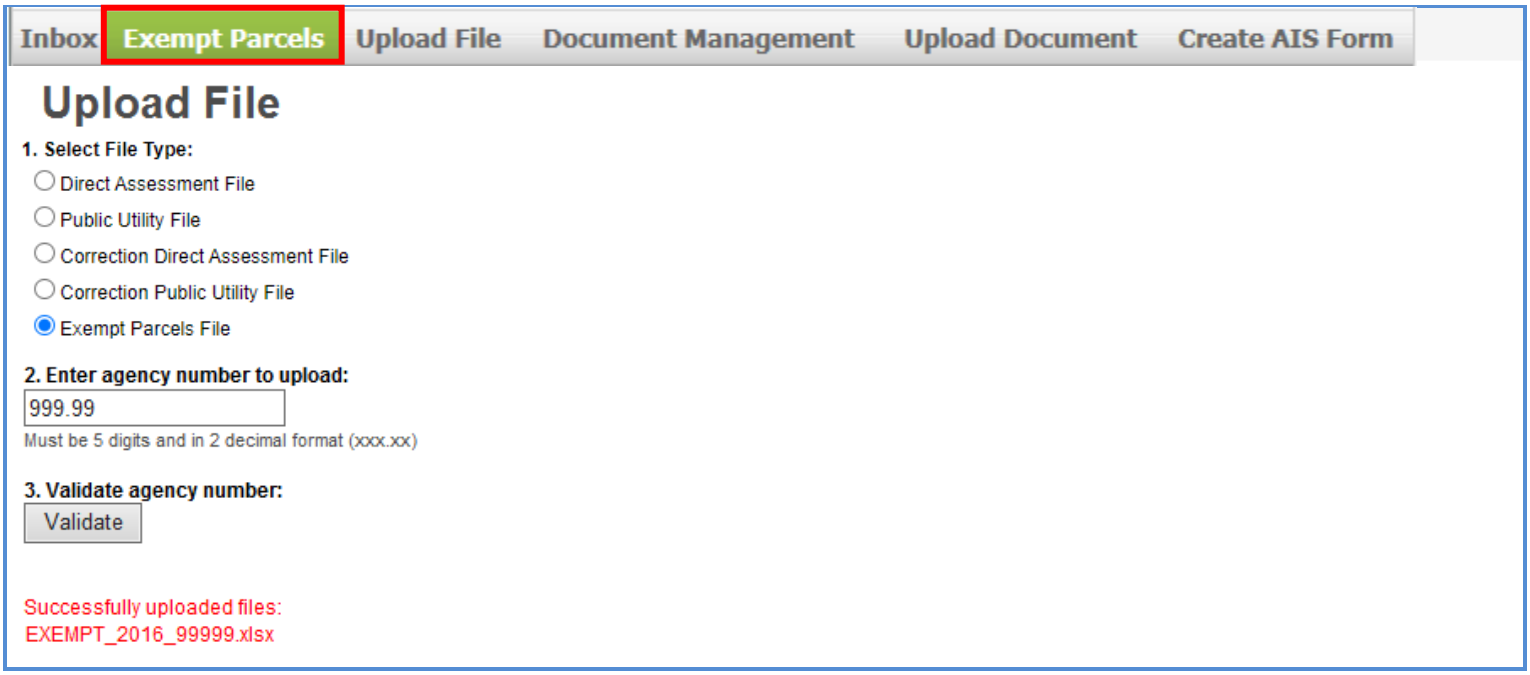


10D. Move the cursor over the white file area to display the file name. If the file name is correct, then click the **Upload** button in step 5.

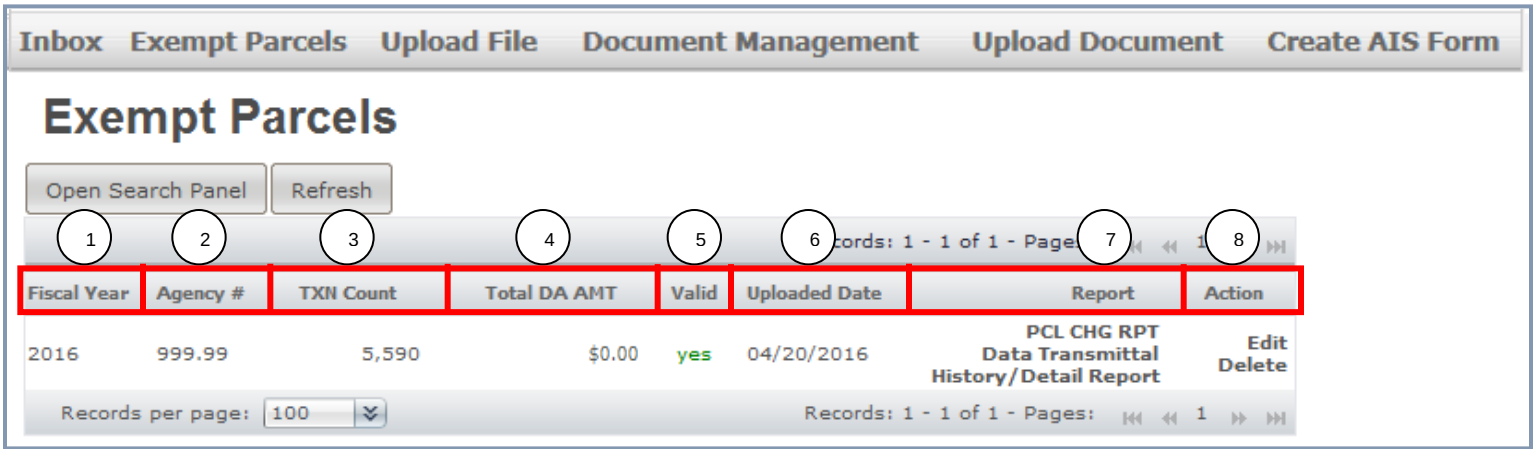


10E. A **message** will pop up under the Upload button after the file loaded successfully. **To load additional file(s), repeat steps 10B to 10D.**

10F. To view the uploaded file, click the **<u>Exempt Parcels</u>** tab.

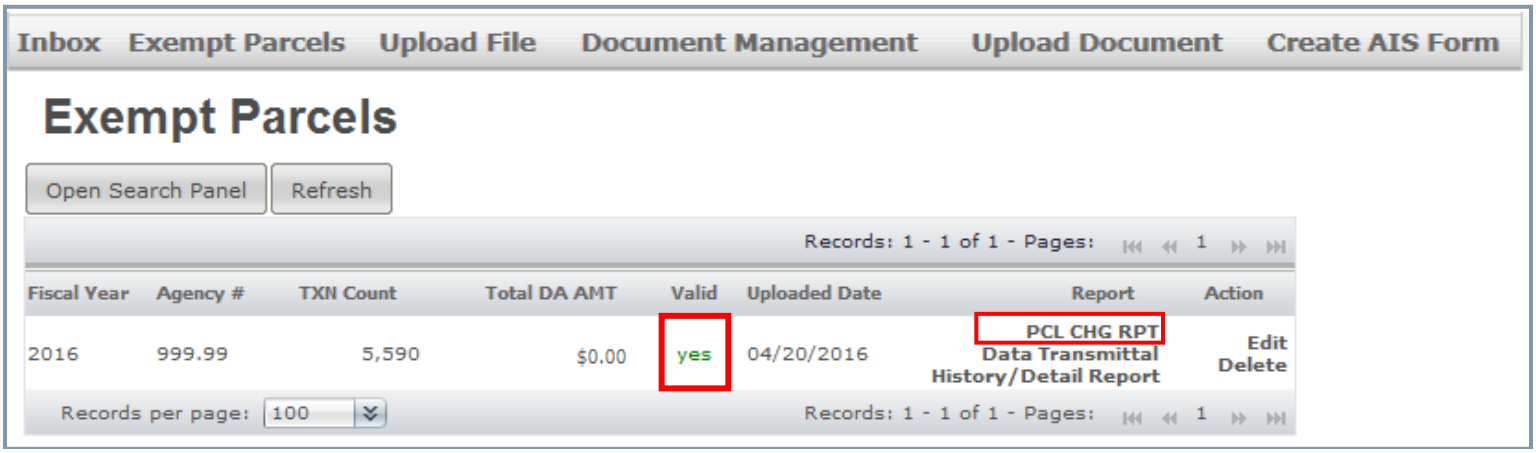


10G. Listed below are **descriptions of the Exempt Parcels columns**. **If Valid = 'no'** then proceed to **<u>Correct the Data File in Edit Mode</u>** section **(P. 66). Proceed to the next step if Valid = 'yes'.**

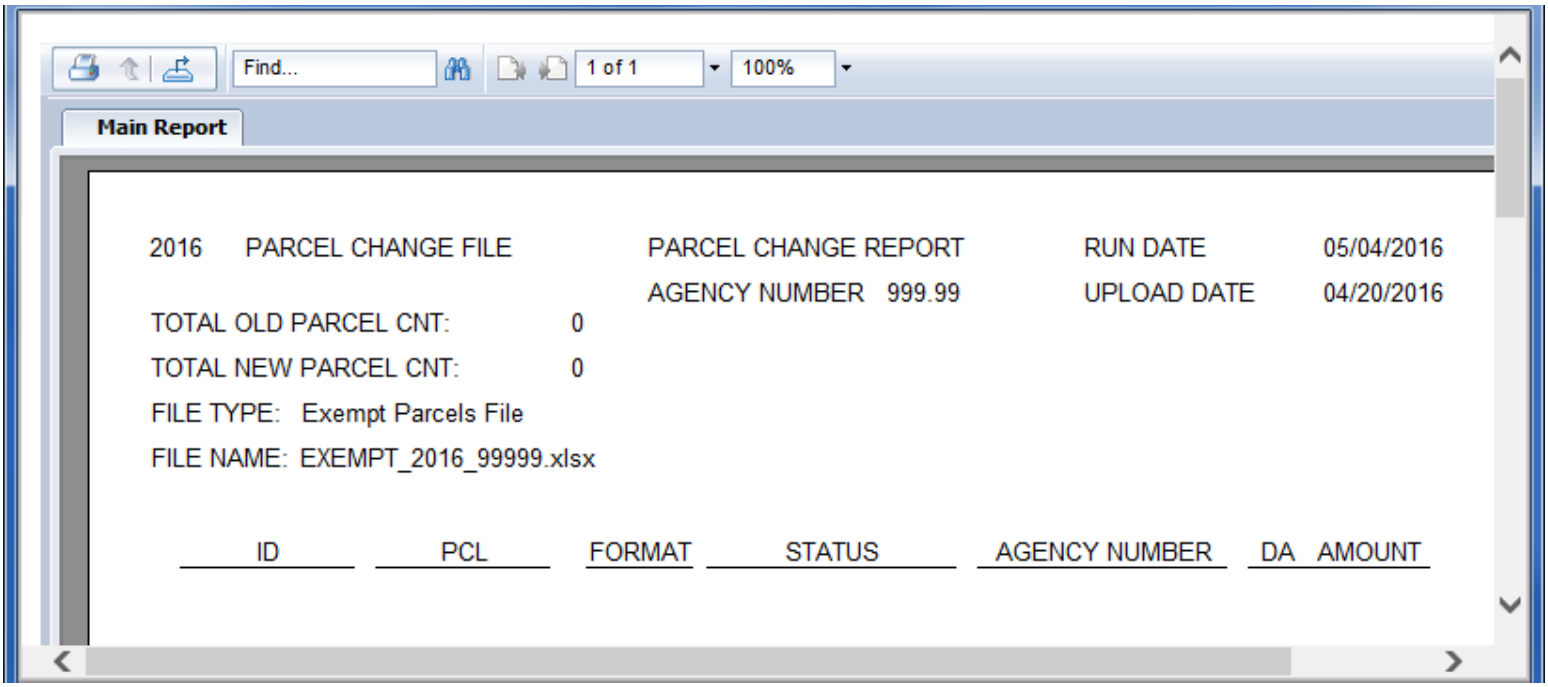


1	**Fiscal Year**	Fiscal Year for which the Agency Number was processed.
2	**Agency #**	Direct Assessment Agency Number assigned to each agency by the Auditor-Controller.
3	**TXN Count**	Total transaction count on the input file
4	**Total DA AMT**	Total assessment amount on the input file
5	**Valid**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

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

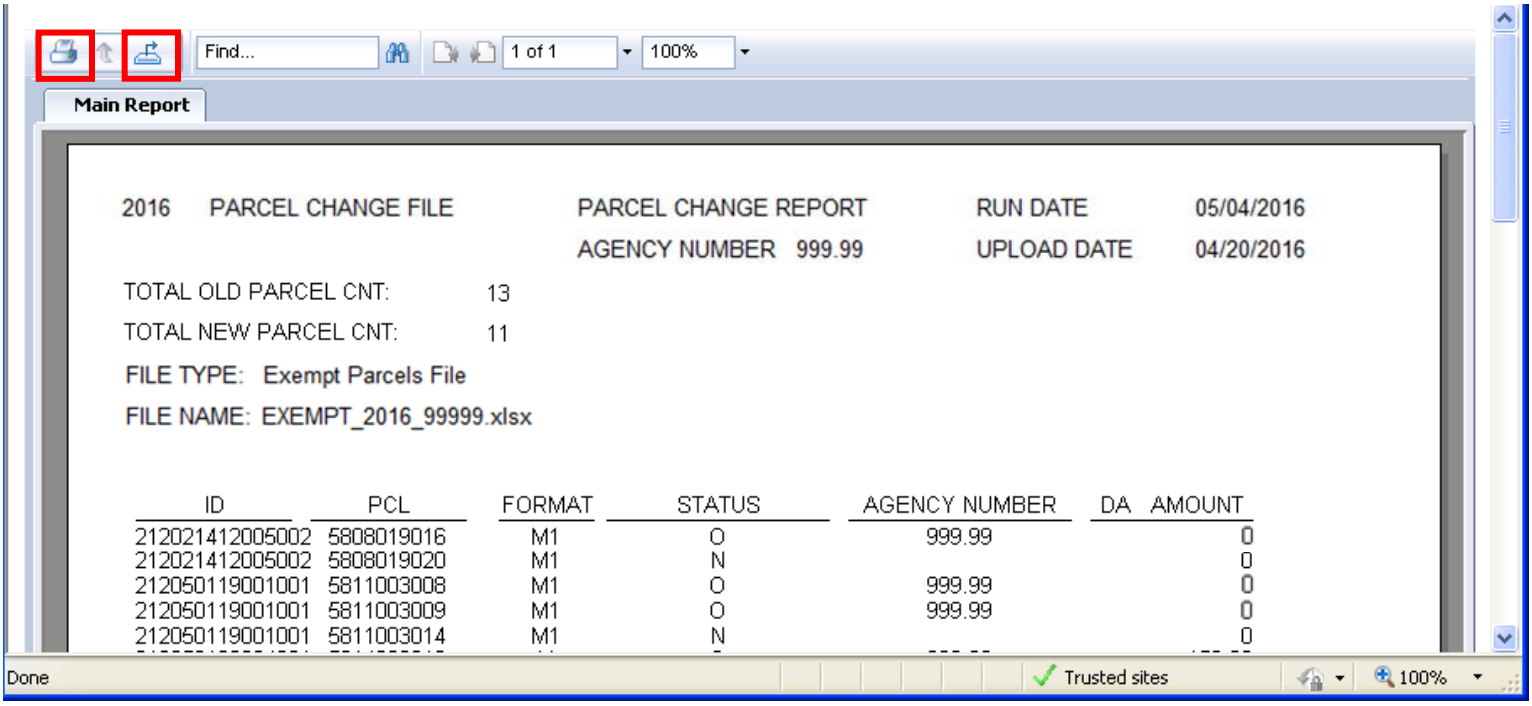


10I. A blank **Parcel Change Report** means that there are no parcel changes for the selected file.

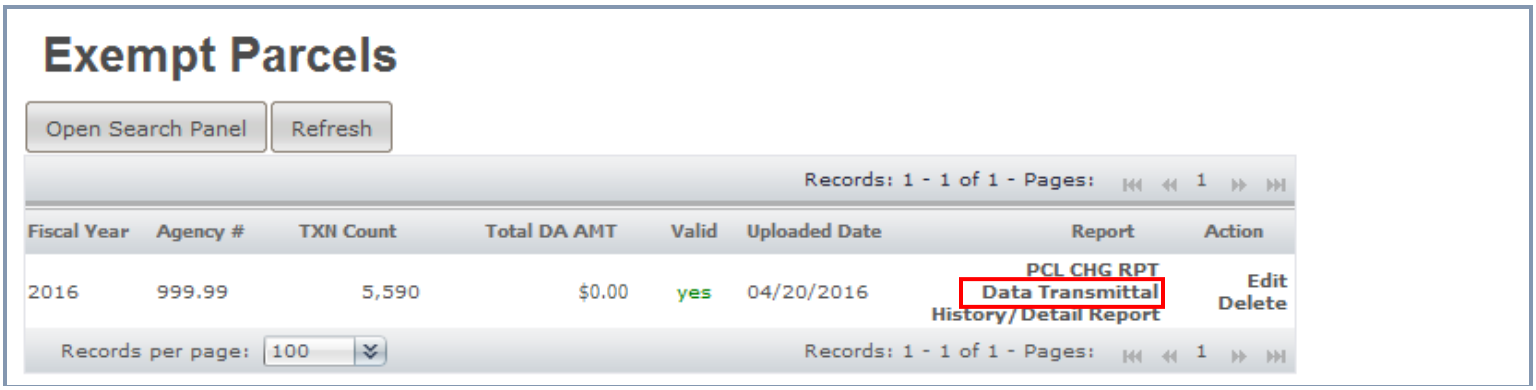


NOTE: **Print** or **Export** the Parcel Change Report if it is **not blank** and proceed with the following options:

• Delete the current file from the Inbox and upload new file with parcel changes included in the file	Go to **'Create the Excel Input Data File' (P. 33)** OR **'Create the Text Input Data File' (P. 42)**
• Add new parcels and delete old parcels in Edit mode	Go to **'Correct the Data File in Edit Mode' (P. 66)**

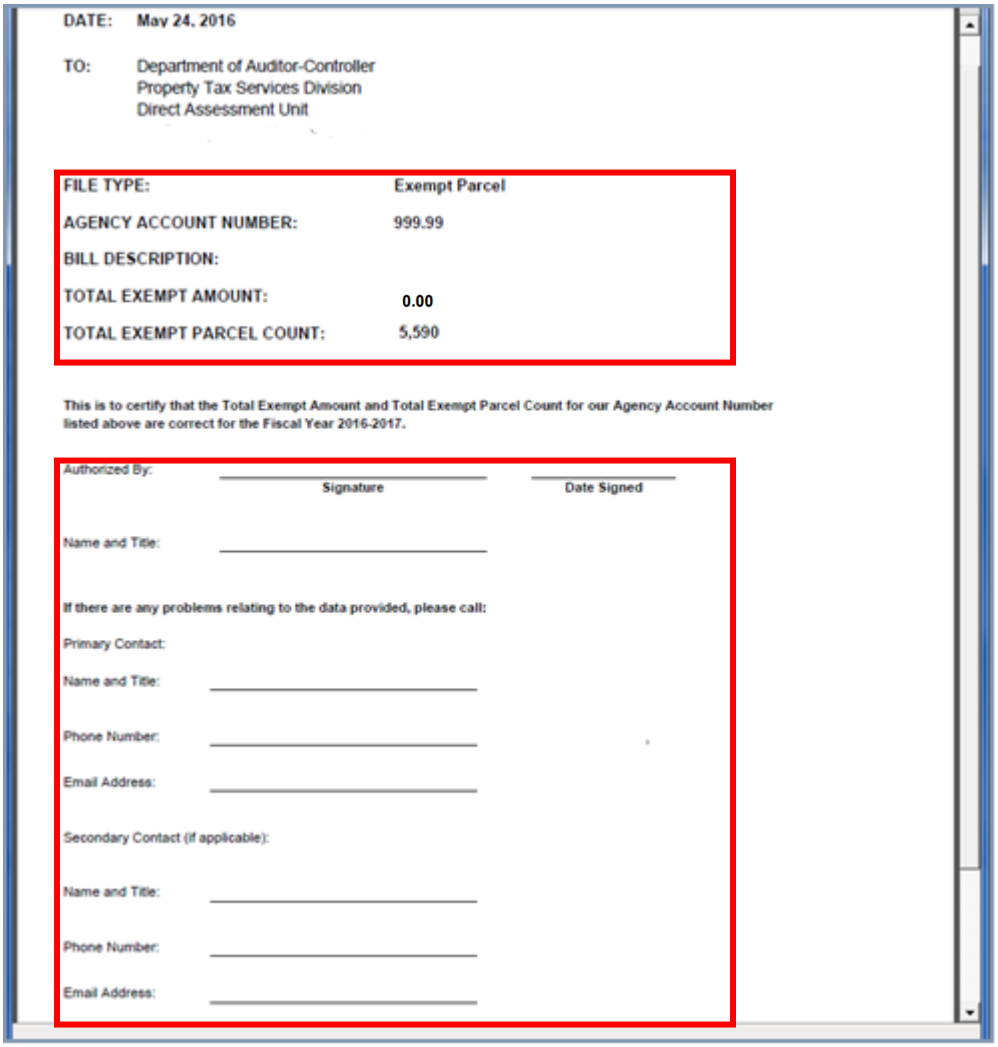


10J. Click the **Data Transmittal** link under the **Report** column to verify the Total Exempt Parcel Count and Total Exempt Amount.



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

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: _____

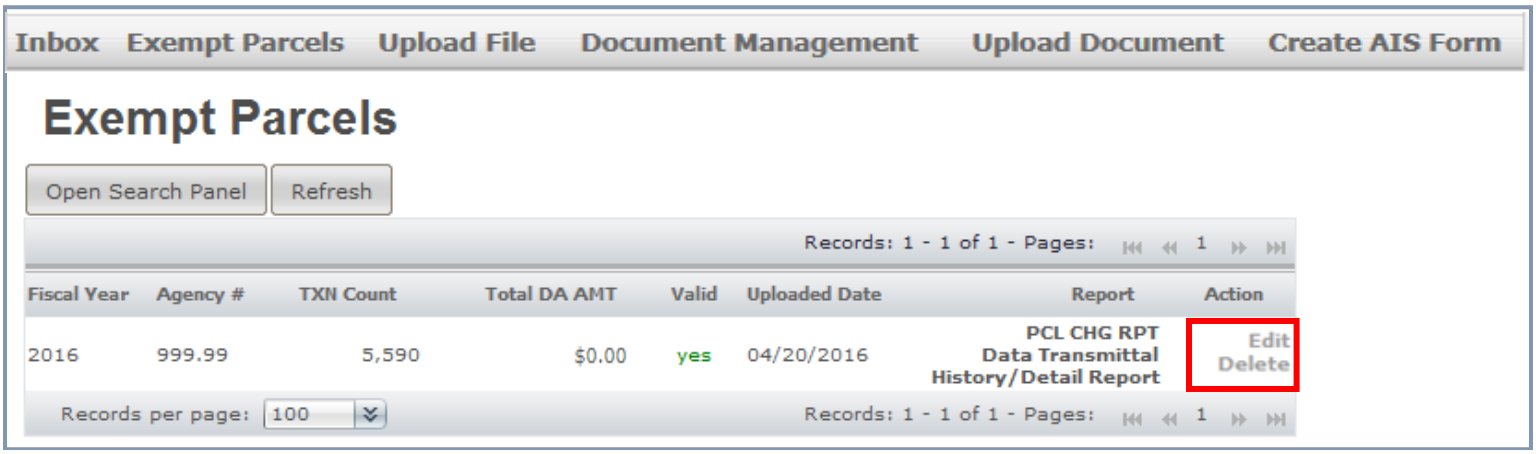
Phone Number: _____

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 **Aquilla Ivery-Simmons at (213) 974-8573** immediately if you need to edit or delete the file.