



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.

DAWEB

https://daweb.auditor.lacounty.gov

 **DAWeb** Auditor-Controller v 2.4.0.0 Welcome, User

User Name

Password

Log In

Forgot Password

We're currently down for maintenance.

DISCLAIMER:

Please note that Internet Explorer (IE) 11 will no longer be supported. MS Edge and Chrome will now be the certified browsers. To access DAWeb, it is recommended to download and use either of these browsers.

Help Menu Options

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

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

The screenshot shows a web browser window with the URL <https://auditor.lacounty.gov/direct-assessments/> in the address bar. The website header features the Auditor-Controller Los Angeles County logo and a LA County Fraud Hotline (1-800-544-6861). The navigation menu includes links for ABOUT THE AUDITOR, PROPERTY TAX, REPORTS, CAREERS, UNCLAIMED CHECKS, and LINKS OF INTEREST. Below the navigation menu, there is a horizontal bar with four tabs: Contact List, DA Manual and Forms, Exception Report, DA Payment - Secured Master, and DA Payment - Secured Defaulted. The DA Manual and Forms tab is currently selected. The main content area is divided into two columns. The left column is titled "Direct Assessment Submission Procedural Manual" and contains a paragraph explaining that this is the current version of the manual for use by taxing agencies. Below the text is a blue button labeled "2020-21 Direct Assessment Manual". The right column is titled "Direct Assessment Forms" and contains three dark blue buttons with white text: "Billing Agreement", "Current Year Correction Form", and "Prior Year Correction Form".

Auditor-Controller
Los Angeles County

LA County Fraud Hotline
1-800-544-6861

ABOUT THE AUDITOR **PROPERTY TAX** REPORTS CAREERS UNCLAIMED CHECKS LINKS OF INTEREST

Contact List **DA Manual and Forms** Exception Report DA Payment - Secured Master DA Payment - Secured Defaulted

Direct Assessment Submission Procedural Manual

This is the current version of the Los Angeles County Auditor-Controller Direct Assessment Submission Procedure Manual. This manual has been created for use by taxing agencies that submit their direct assessments to the Los Angeles County Auditor-Controller for processing.

2020-21 Direct Assessment Manual

Direct Assessment Forms

Billing Agreement

Current Year Correction Form

Prior Year Correction Form

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

DAWeb Auditor-Controller v 2.4.0.0

User Name
auser

Password
••••••••

Log In

[Forgot Password](#)

Help Menu Options

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

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

User Name

Password

Log In

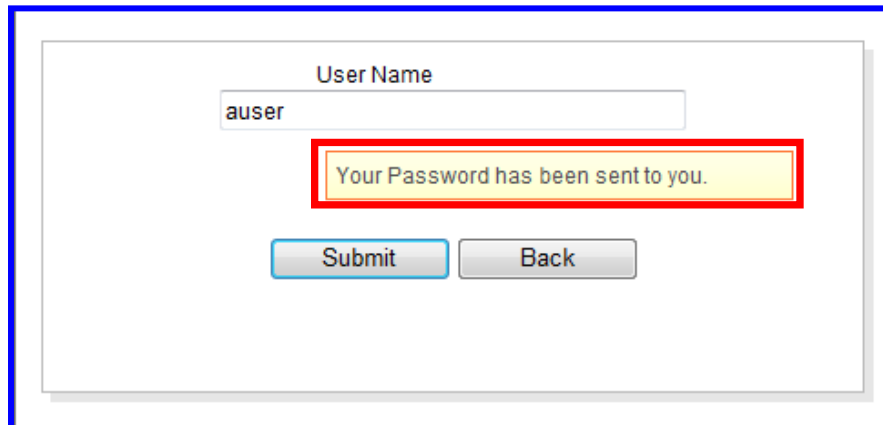
[Forgot Password](#)

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



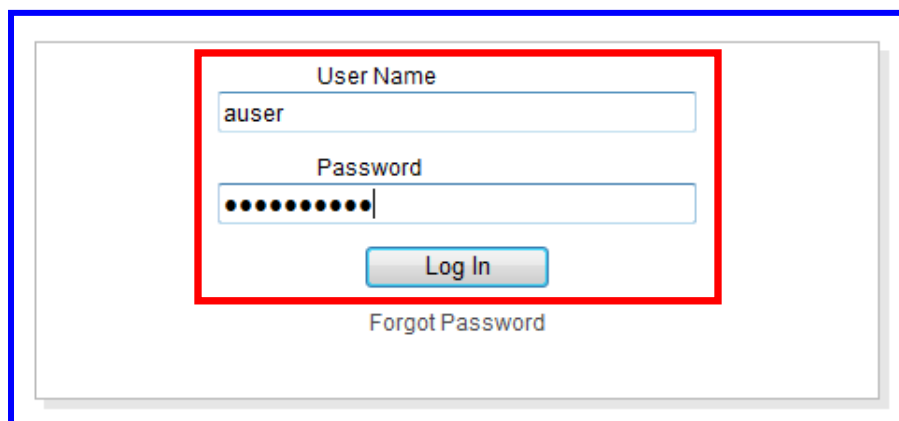
A screenshot of a web form for user registration. It features a text input field labeled "User Name" containing the text "auser". Below the input field are two buttons: "Submit" and "Back". The "Submit" button is highlighted with a red rectangular border. The entire form is enclosed in a blue rectangular border.

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



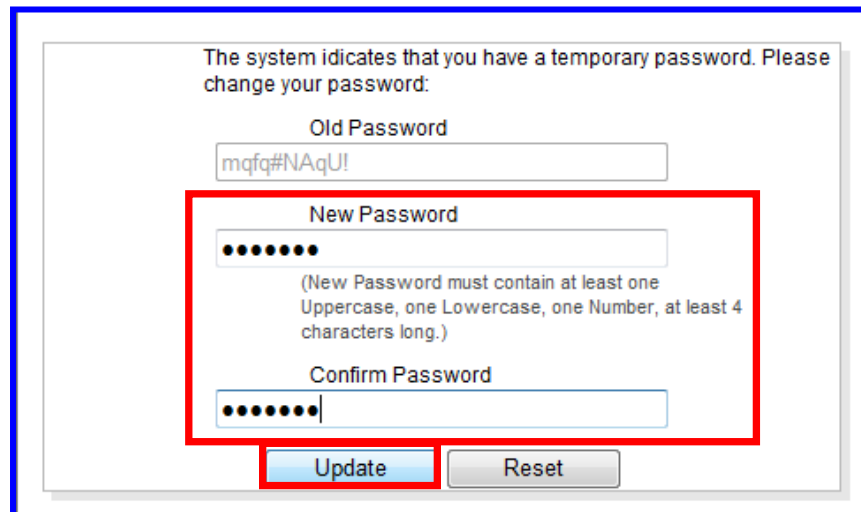
A screenshot of the same web form as in step E. The "User Name" field still contains "auser". A yellow rectangular message box with a red border is now visible, containing the text "Your Password has been sent to you." Below the message box are the "Submit" and "Back" buttons. The entire form is enclosed in a blue rectangular border.

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



A screenshot of a web form for logging in. It features two text input fields: "User Name" containing "auser" and "Password" containing a series of dots. Below the password field is a "Log In" button. A "Forgot Password" link is located below the "Log In" button. A red rectangular border highlights the "User Name" field, the "Password" field, and the "Log In" button. The entire form is enclosed in a blue rectangular border.

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



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

Old Password
mqfq#NAqU!

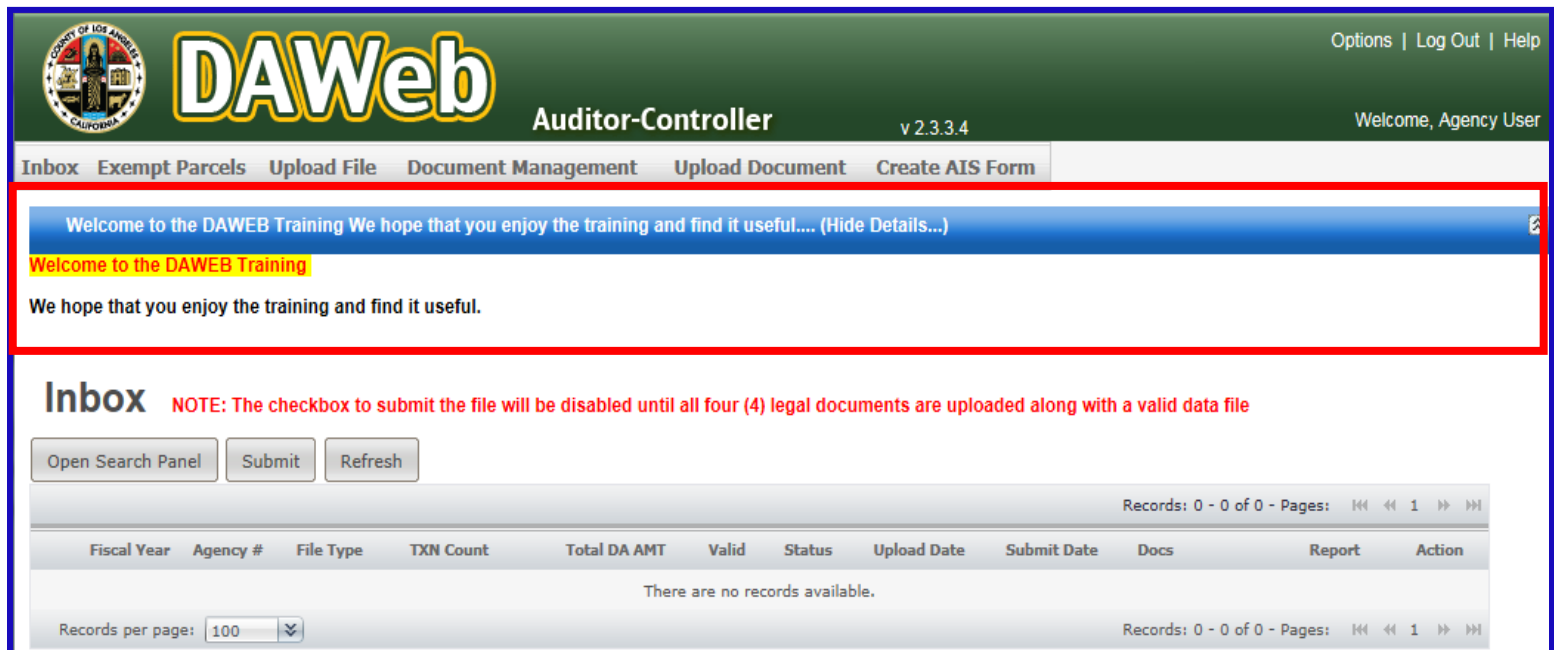
New Password
••••••

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

Confirm Password
••••••

Update Reset

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



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

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

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

Welcome to the DAWEB Training

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

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

Open Search Panel Submit Refresh

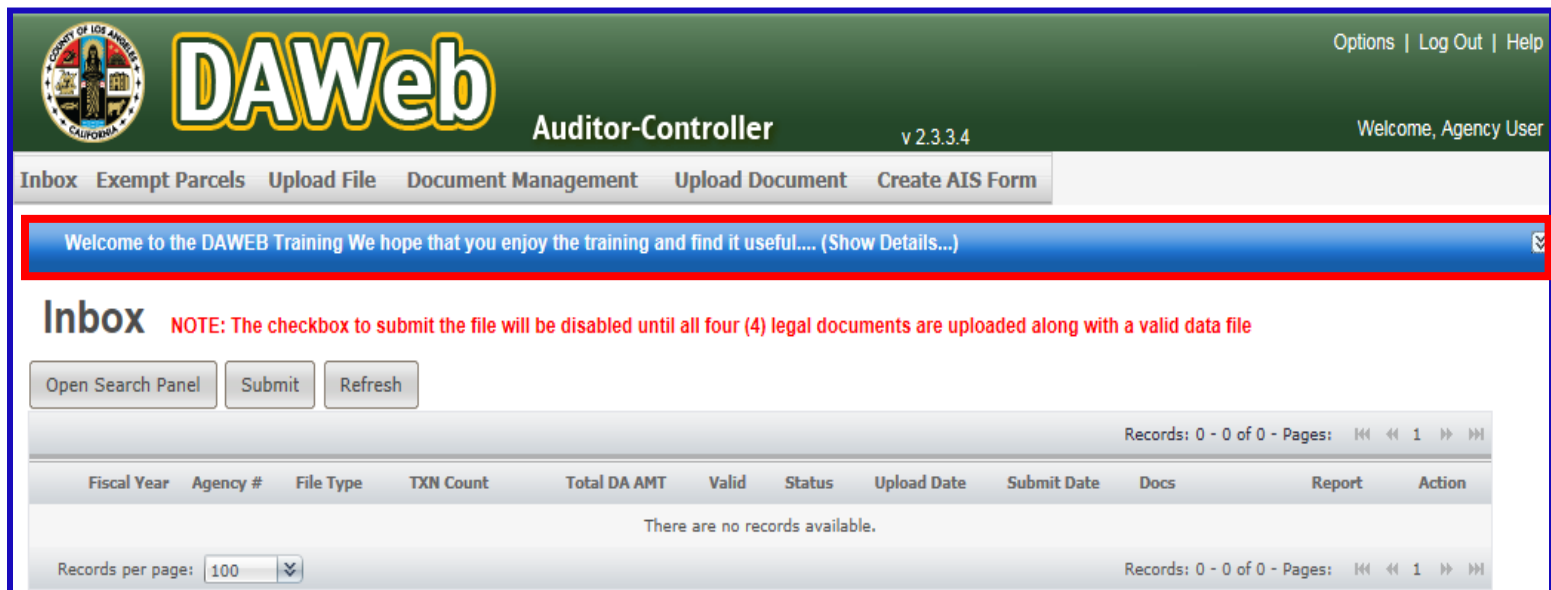
Records: 0 - 0 of 0 - Pages: 1

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

Records per page: 100

Records: 0 - 0 of 0 - Pages: 1

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



DAWeb Auditor-Controller v 2.3.3.4

Options | Log Out | Help

Welcome, Agency User

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

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

Inbox

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

Open Search Panel Submit Refresh

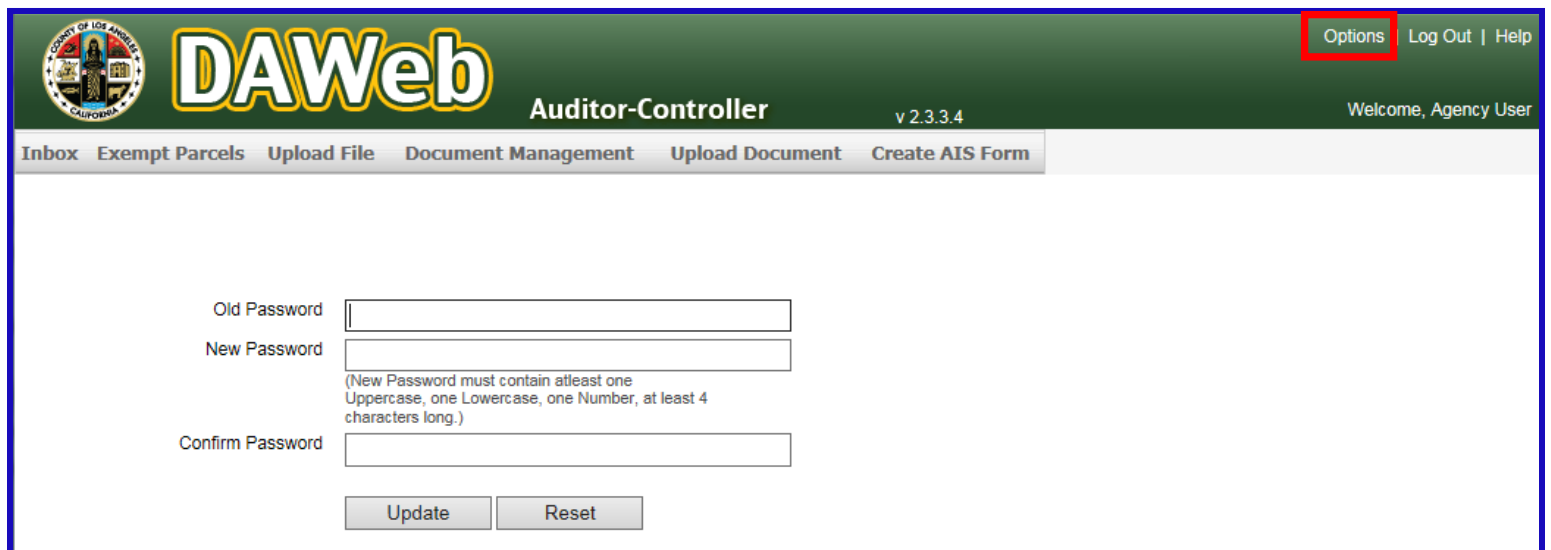
Records: 0 - 0 of 0 - Pages: 1

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

Records per page: 100

Records: 0 - 0 of 0 - Pages: 1

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



DAWeb Auditor-Controller v 2.3.3.4

Options Log Out | Help

Welcome, Agency User

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

Old Password

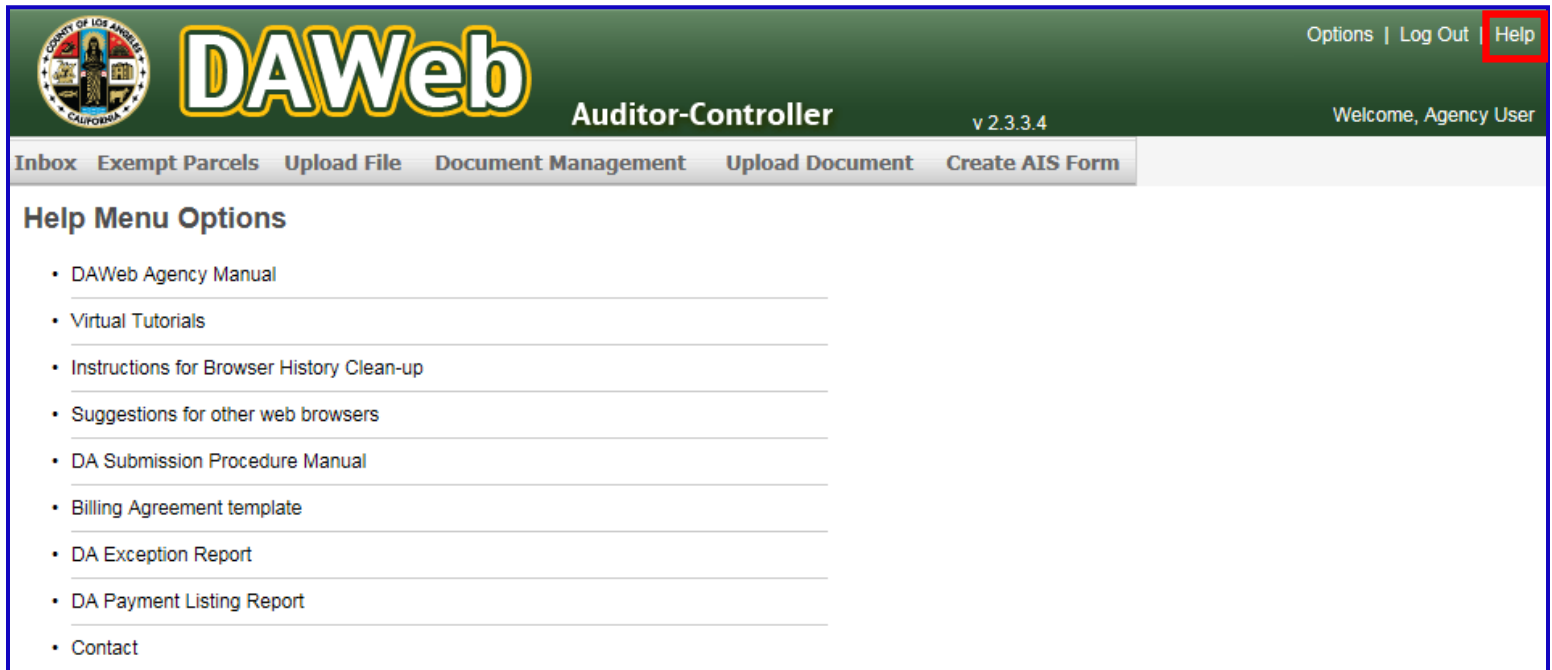
New Password

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

Confirm Password

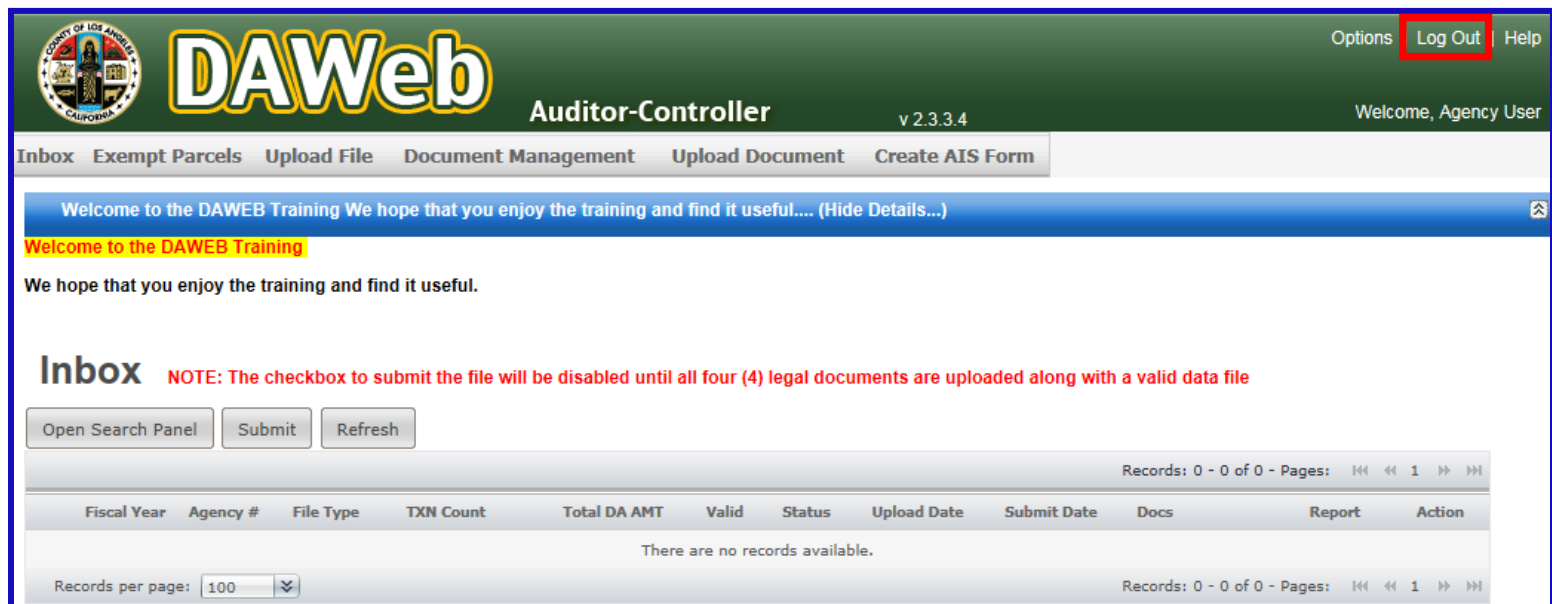
Update Reset

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



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

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



The screenshot shows the DAWeb Auditor-Controller interface. The header is identical to the previous screenshot, with "Log Out" highlighted by a red box. Below the header is a menu bar with "Inbox", "Exempt Parcels", "Upload File", "Document Management", "Upload Document", and "Create AIS Form". The main content area displays a welcome message: "Welcome to the DAWEB Training We hope that you enjoy the training and find it useful.... (Hide Details...)" and "Welcome to the DAWEB Training". Below this is a note: "We hope that you enjoy the training and find it useful." The "Inbox" section is titled, followed by a red note: "NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file". Below the note are buttons for "Open Search Panel", "Submit", and "Refresh". A table header is visible with columns: "Fiscal Year", "Agency #", "File Type", "TXN Count", "Total DA AMT", "Valid", "Status", "Upload Date", "Submit Date", "Docs", "Report", and "Action". Below the table header, it says "There are no records available." and "Records: 0 - 0 of 0 - Pages: 1".

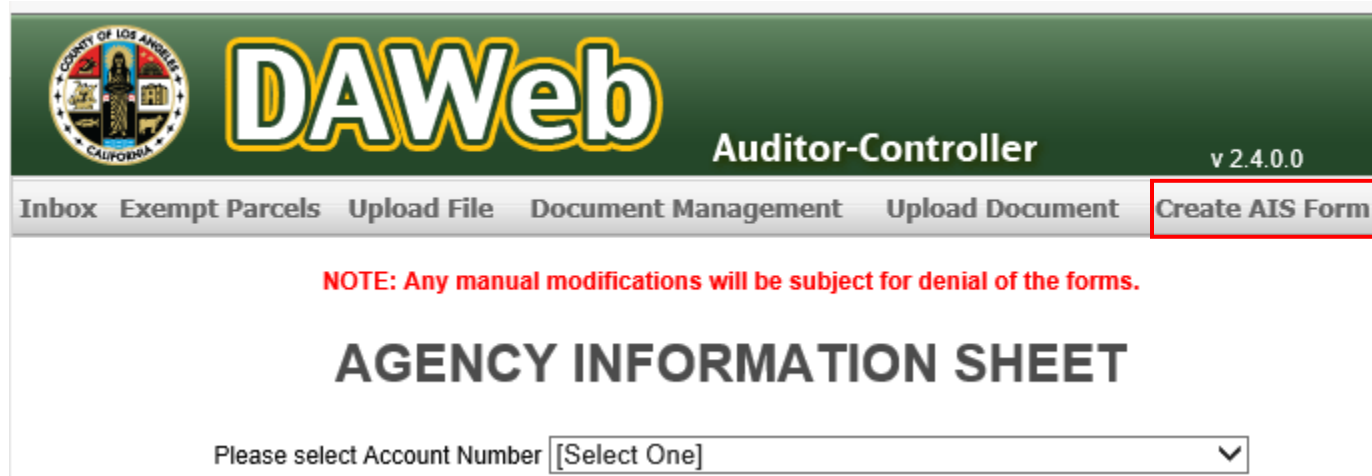
CREATE AGENCY INFORMATION SHEET FORM

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

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

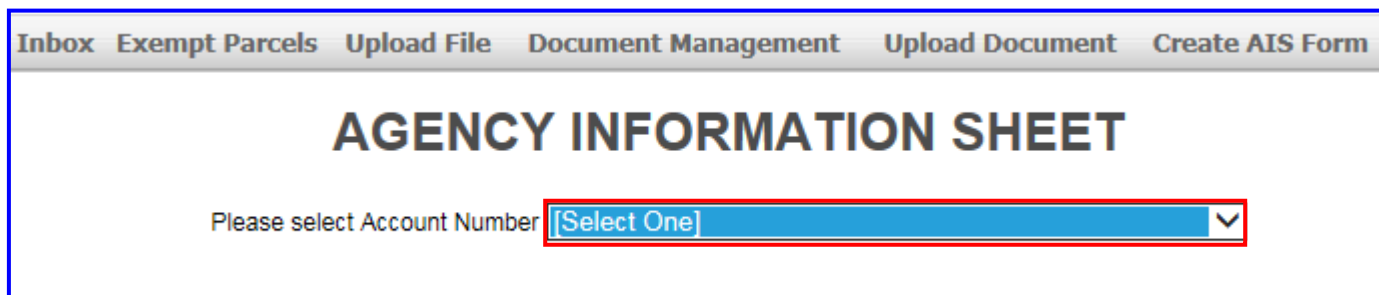
1A. To create an Agency Information Sheet, click the **Create AIS Form** tab.

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




The screenshot shows the DAWeb Auditor-Controller interface. The header includes the County of Los Angeles seal, the DAWeb logo, and the version number v 2.4.0.0. The navigation bar contains links for Inbox, Exempt Parcels, Upload File, Document Management, Upload Document, and Create AIS Form. The 'Create AIS Form' link is highlighted with a red box. Below the navigation bar, a red note states: 'NOTE: Any manual modifications will be subject for denial of the forms.' The main heading is 'AGENCY INFORMATION SHEET'. Below this, there is a dropdown menu labeled 'Please select Account Number' with the text '[Select One]' and a downward arrow.

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



This screenshot is a zoomed-in view of the 'AGENCY INFORMATION SHEET' section from the previous image. It shows the navigation bar at the top with 'Create AIS Form' highlighted. The main heading 'AGENCY INFORMATION SHEET' is centered. Below it, the text 'Please select Account Number' is followed by a dropdown menu. The dropdown menu is highlighted with a red box and contains the text '[Select One]' and a downward arrow.

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.



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)

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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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.

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).

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

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

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

AGENCY INFORMATION SHEET

Please select Account Number 000.04 - AGENCY TEST

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

<input checked="" type="checkbox"/> Consultant Agency Name or	<input type="checkbox"/> 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 PNLT Y 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:

Website:

Phone No. To Be Listed On Tax Bill:

ext.

Contact's Address 1:

Address 2: City: State: Zip Code:

Processing Information

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

RT PNLT Y

Contact Name: Phone No.:

ext.

Consultant/Levying Agency E-mail Address:

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

Authorized Signee

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

Name:

CLEAR FORM

SAVE

PRINT

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

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

AGENCY INFORMATION SHEET

Please select Account Number

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

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

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

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

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

Bill Information

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

NBS

Contact Name:

Website:

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

Contact's Address 1:

Address 2: City: State: Zip Code:

Processing Information

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

RT PNLTY

Contact Name: Phone No.: ext.

Consultant/Levying Agency E-mail Address:

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

Authorized Signee

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

Name:

CLEAR FORM

SAVE

PRINT

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

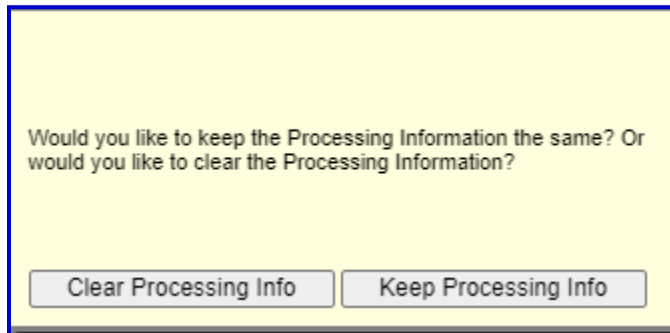
☐ Director of Finance ☐ Manager ☐ Authorized Consulting Agent ☐ Other (Title):

Name:

CLEAR FORM

SAVE

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



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

Clear Processing Info Keep Processing Info

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

RETRIEVE THE PARCEL CHANGE REPORT

IMPORTANT MESSAGE

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

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

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

Options | Log Out | Help

Welcome, Agency User

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

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

Open Search Panel Submit Refresh

Records: 0 - 0 of 0 - Pages: 1

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

Records per page: 100

Records: 0 - 0 of 0 - Pages: 1

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

Options | Log Out | Help

Welcome, Agency User

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

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

Open Search Panel Submit Refresh

Search Panel

Fiscal Year **2021**

Agency Number

File Type All

Valid All

Status All

Upload Date

From To

Search Reset Close Search Panel

Records: 0 - 0 of 0 - Pages: 1

Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
There are no records available.							

Records: 0 - 0 of 0 - Pages: 1

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.

DAWeb Auditor-Controller v 2.4.0.0

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

Open Search Panel Submit Refresh

Search Panel

Fiscal Year

Agency Number

File Type

Valid

Status

Upload Date

From To

Search Reset Close Search Panel

Records: 0 - 0 of 0 - Pages: 1

Total DA AMT Valid Status Upload Date Submit Date Docs Report Action

There are no records available.

Records: 0 - 0 of 0 - Pages: 1

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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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.

<div> </div>											
Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form											
Inbox NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file											
<div>Open Search Panel Submit Refresh</div>											
Records: 1 - 10 of 734 - Pages: 1 2 3 4 5											
Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
<input type="checkbox"/> 2021	939.21	PU	2	\$8,857.59	yes	SENT TO MAINFRAME	08/10/2021	08/10/2021	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/> 2021	939.21	DA	6,069	\$2,559,843.51	yes	SENT TO MAINFRAME	08/09/2021	08/09/2021	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/> 2021	931.72	DA COR v4	2,499	\$0.00	yes	SENT TO MAINFRAME	08/10/2021	08/15/2021	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/> 2021	931.72	DA	32,476	\$14,270,279.16	yes	SENT TO MAINFRAME	08/09/2021	08/15/2021	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/> 2021	923.55	DA	4,224	\$4,088,832.00	yes	SENT TO MAINFRAME	08/02/2021	08/02/2021	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/> 2021	923.51	DA	4,232	\$1,617,724.32	yes	SENT TO MAINFRAME	08/02/2021	08/02/2021	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/> 2021	905.62	DA	20,194	\$9,435,848.44	yes	SENT TO MAINFRAME	08/10/2021	08/10/2021	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

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

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

Find...

1 of 1

100%

Main Report

2021

PARCEL CHANGE FILE

PARCEL CHANGE REPORT

RUN DATE

06/29/2021

AGENCY NUMBER

999.99

UPLOAD DATE

06/16/2020

TOTAL OLD PARCEL CNT:

2

TOTAL NEW PARCEL CNT:

10

FILE TYPE:

Direct Assessment File

FILE NAME:

DA_2018_99999.xls

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

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

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

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

Find... 1 of 1 100%

Main Report

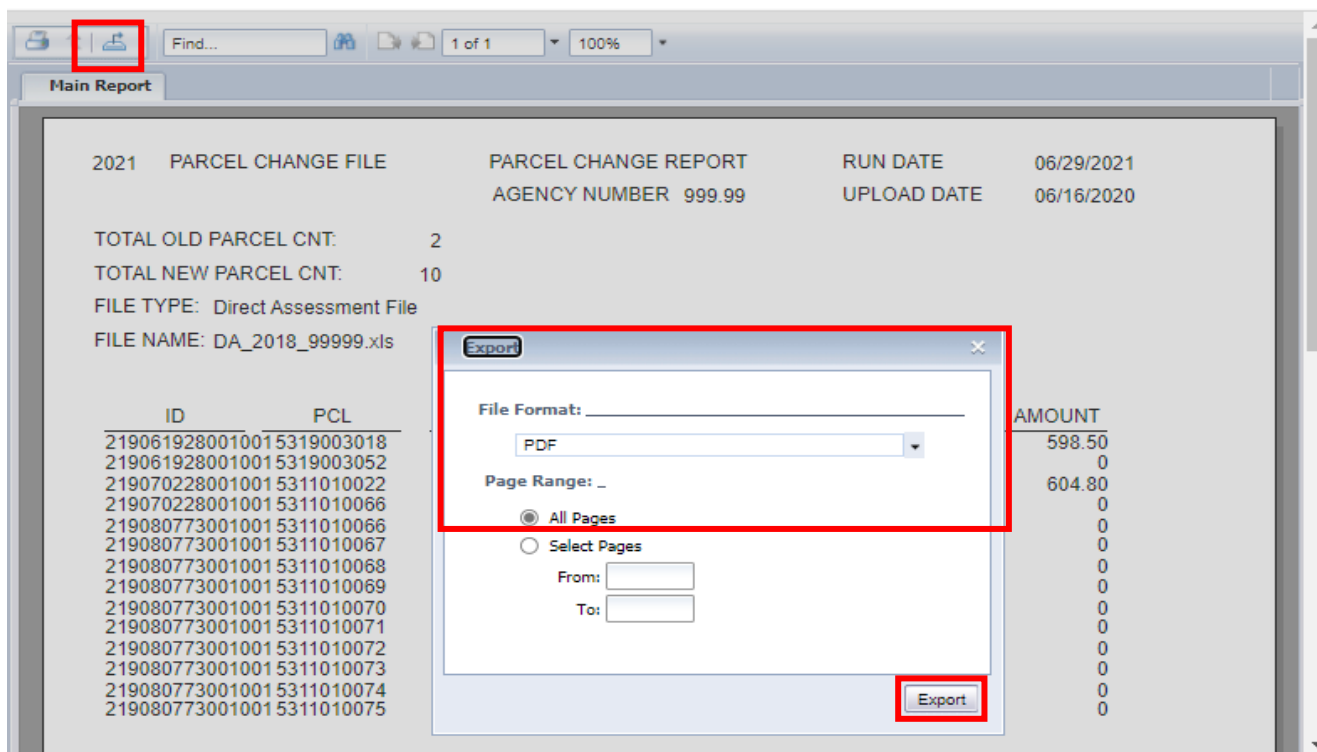
1	2021	PARCEL CHANGE FILE	2	PARCEL CHANGE REPORT	4	RUN DATE	06/29/2021
6			3	AGENCY NUMBER	5	UPLOAD DATE	06/16/2020
7		TOTAL OLD PARCEL CNT:		2			
8		TOTAL NEW PARCEL CNT:		10			
9		FILE TYPE:		Direct Assessment File			
		FILE NAME:		DA_2018_99999.xls			

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

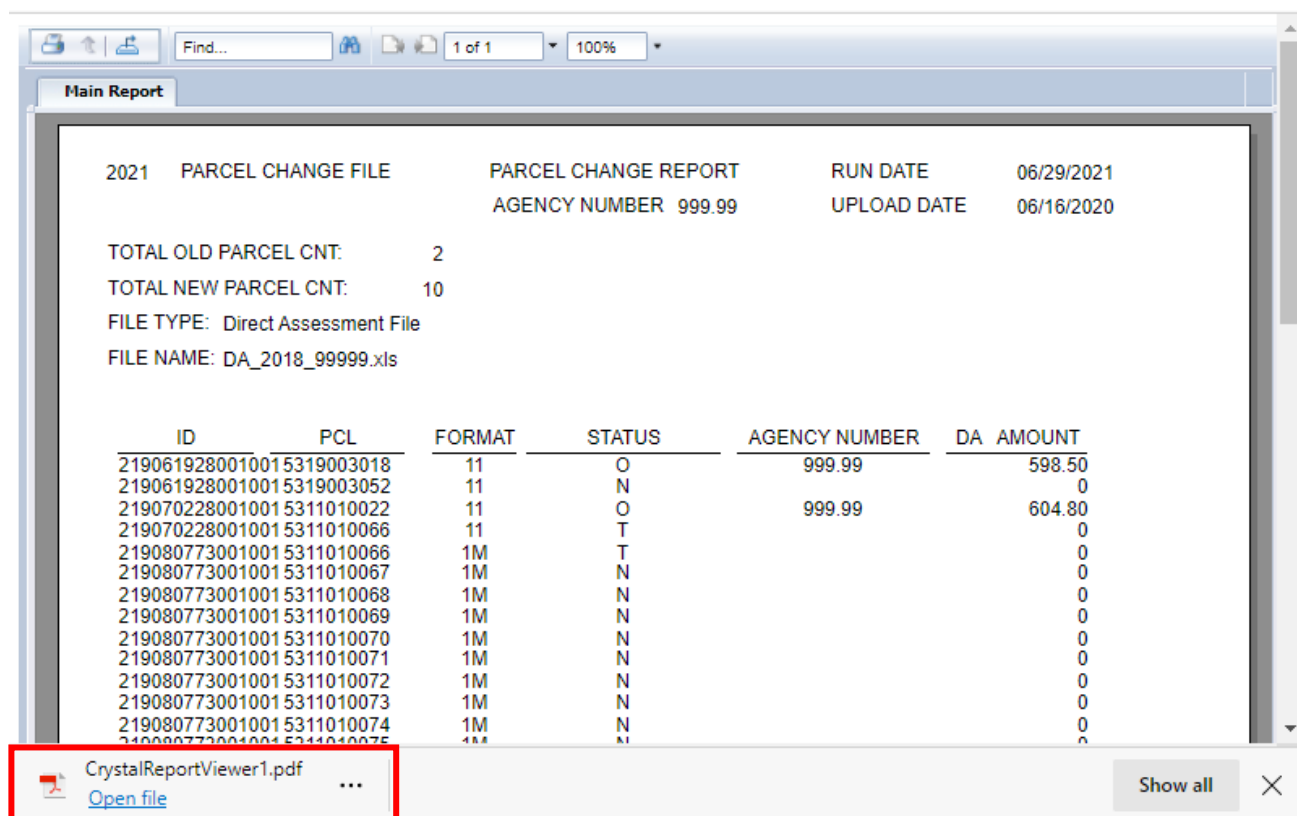
NOTE: Listed below are the fields on the **Parcel Change Report**.

1	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 <ul style="list-style-type: none"> • 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) <ul style="list-style-type: none"> • 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.

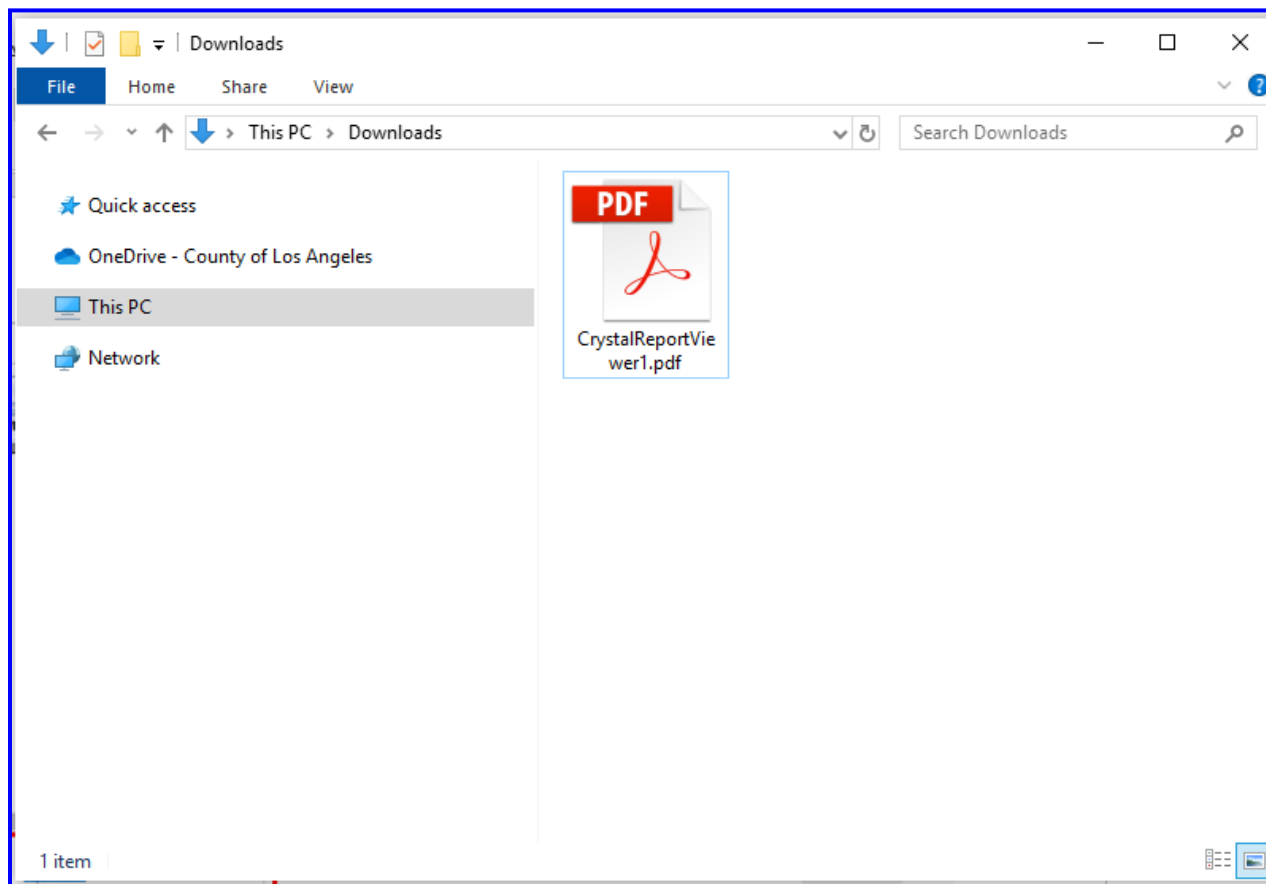
2F. To Export and Save as **PDF**, click the **Export icon**, select **PDF** from the File Format drop down box and click the **Export** button. To Export and Save as Excel, skip to step 2J (**P. 31**)



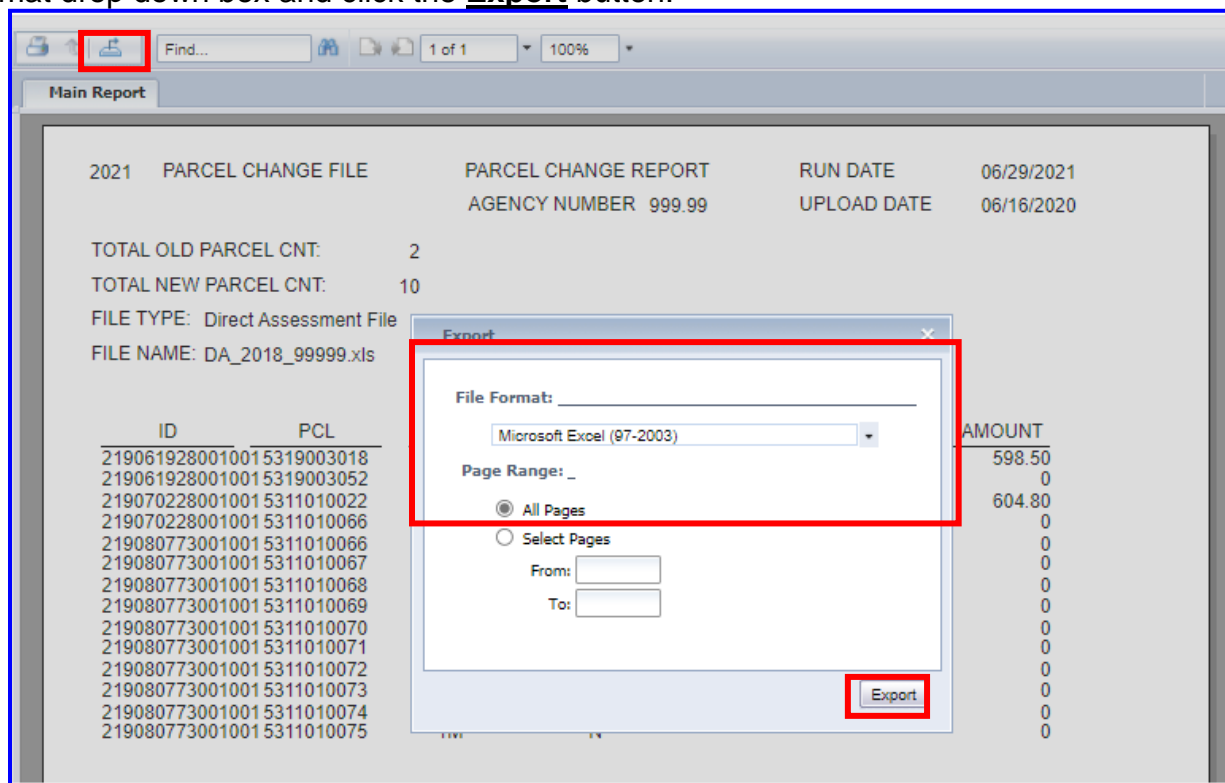
2G. File will automatically download.



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.

Main Report

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

TOTAL OLD PARCEL CNT: 2
TOTAL NEW PARCEL CNT: 10
FILE TYPE: Direct Assessment File
FILE NAME: DA_2018_99999.xls

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

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

Show all X

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

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← → ↕ ⬇ This PC > Downloads

Search Downloads

Quick access

OneDrive - County of Los Angeles

This PC

Network

CrystalRep
ortViewer1.
xls

1 item

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

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

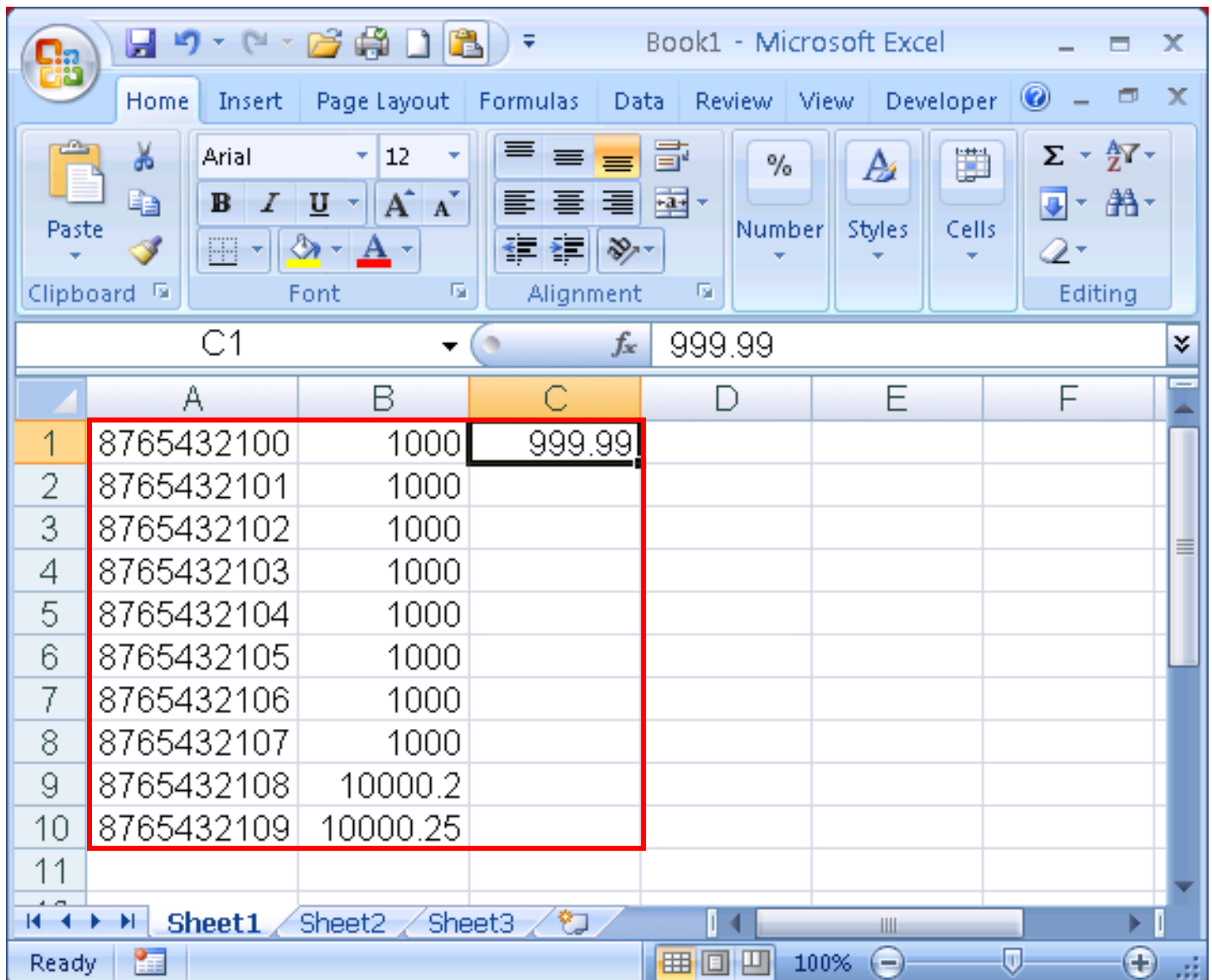
CREATE THE EXCEL INPUT DATA FILE

3A. Open Microsoft Excel



3B. Enter the fields in the following format:

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

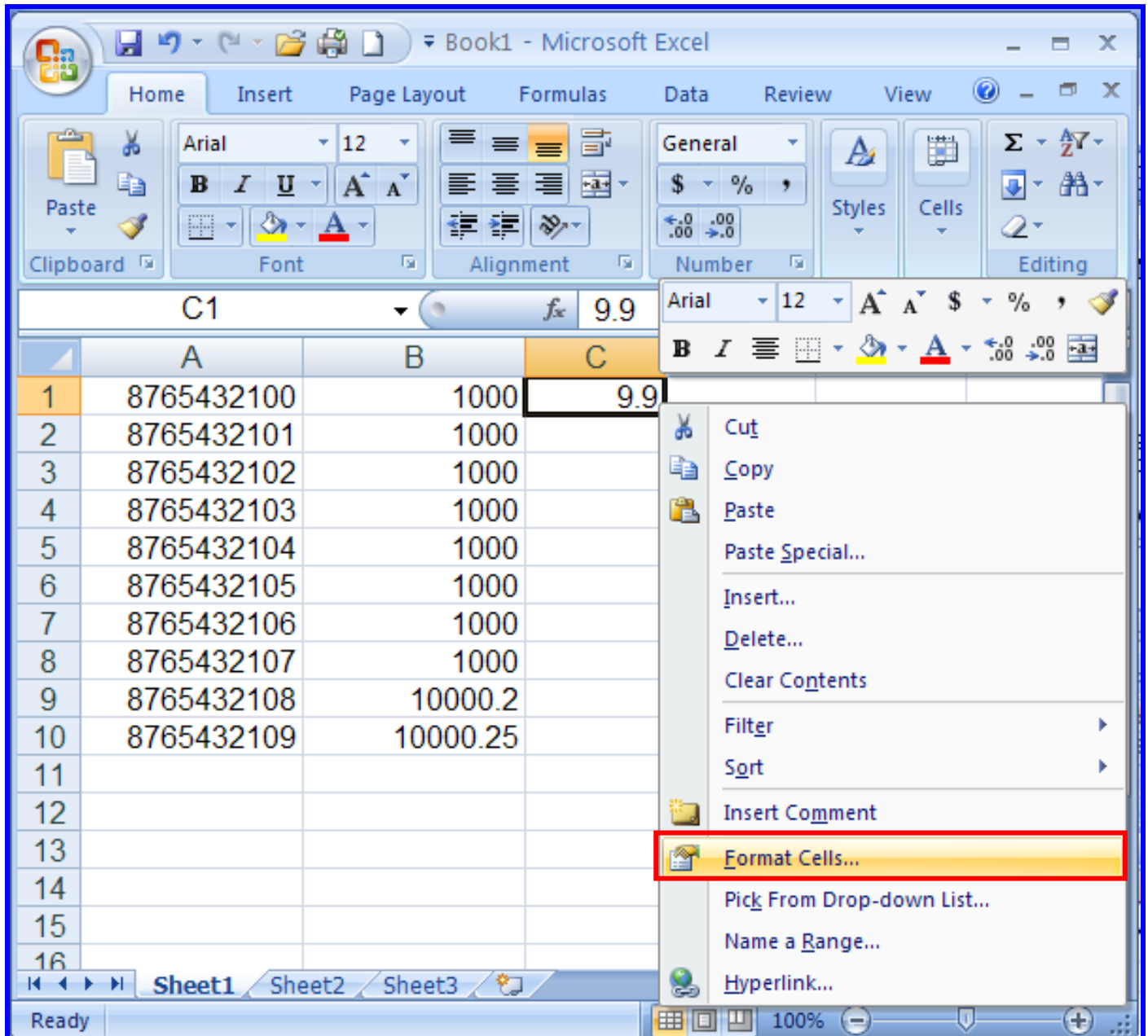


NOTE: For Agency Numbers with **leading and/or ending zeros**, cell C1 must be set to Text format before entering the agency number. This will ensure that leading and ending zeros are displayed and not cut off by Excel auto formatting. Please make sure that the Agency number is **5 digits and in 2 decimal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

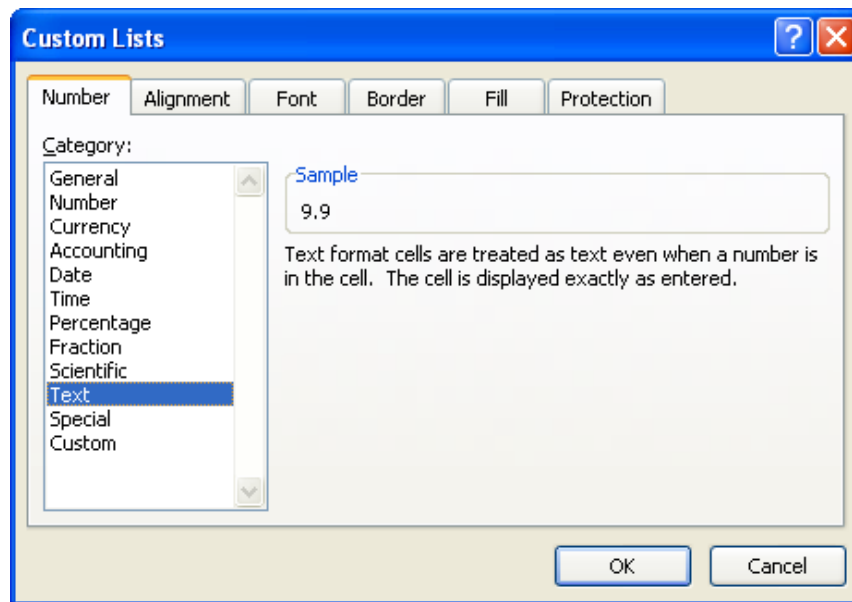
For example, **agency number 009.90 should not** be displayed on the Excel file as **9.9 or 9.90** as it will **result in an invalid agency number**.

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

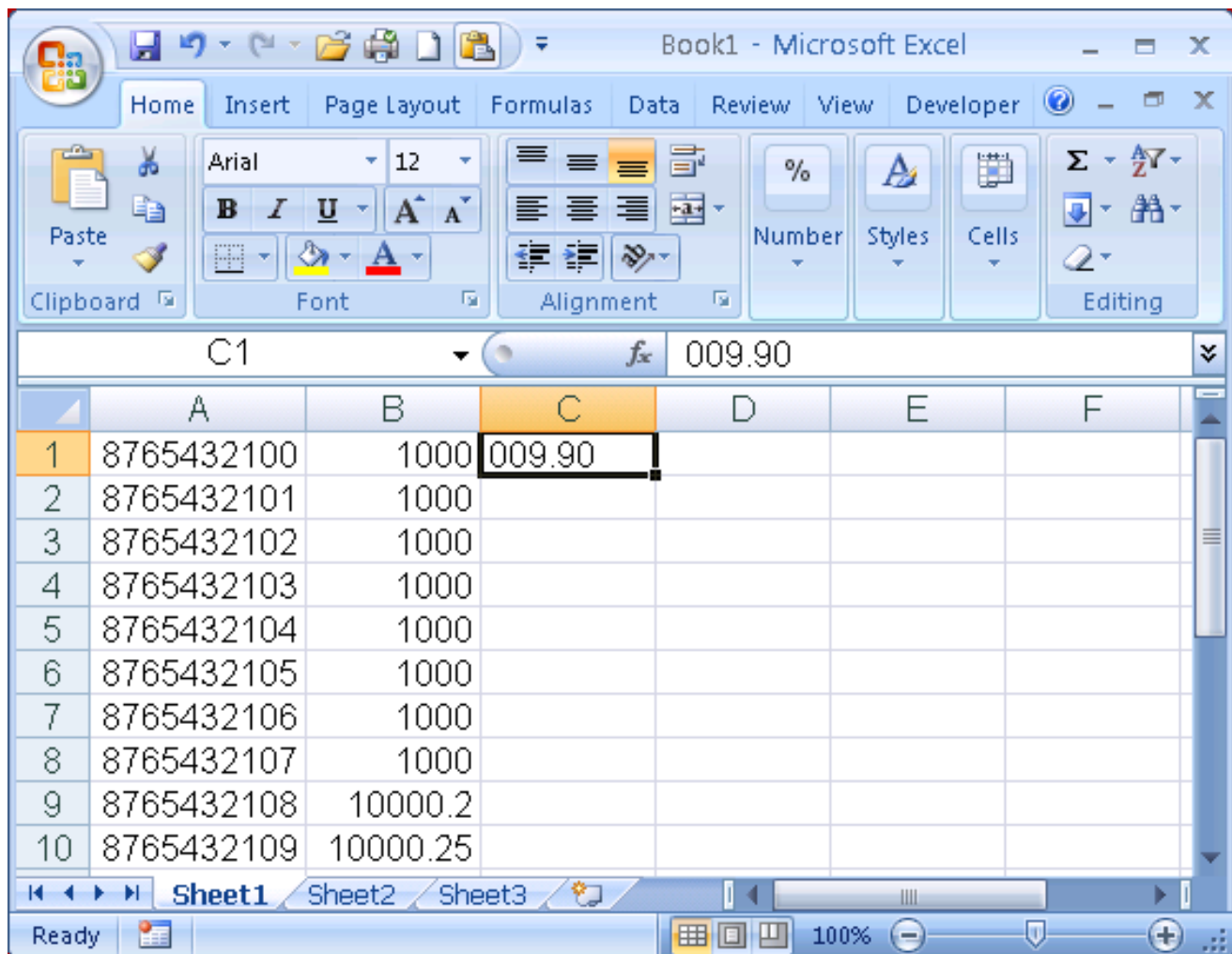
- **Right click** on cell C1 and select **Format Cells...** from the pop-up menu.



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

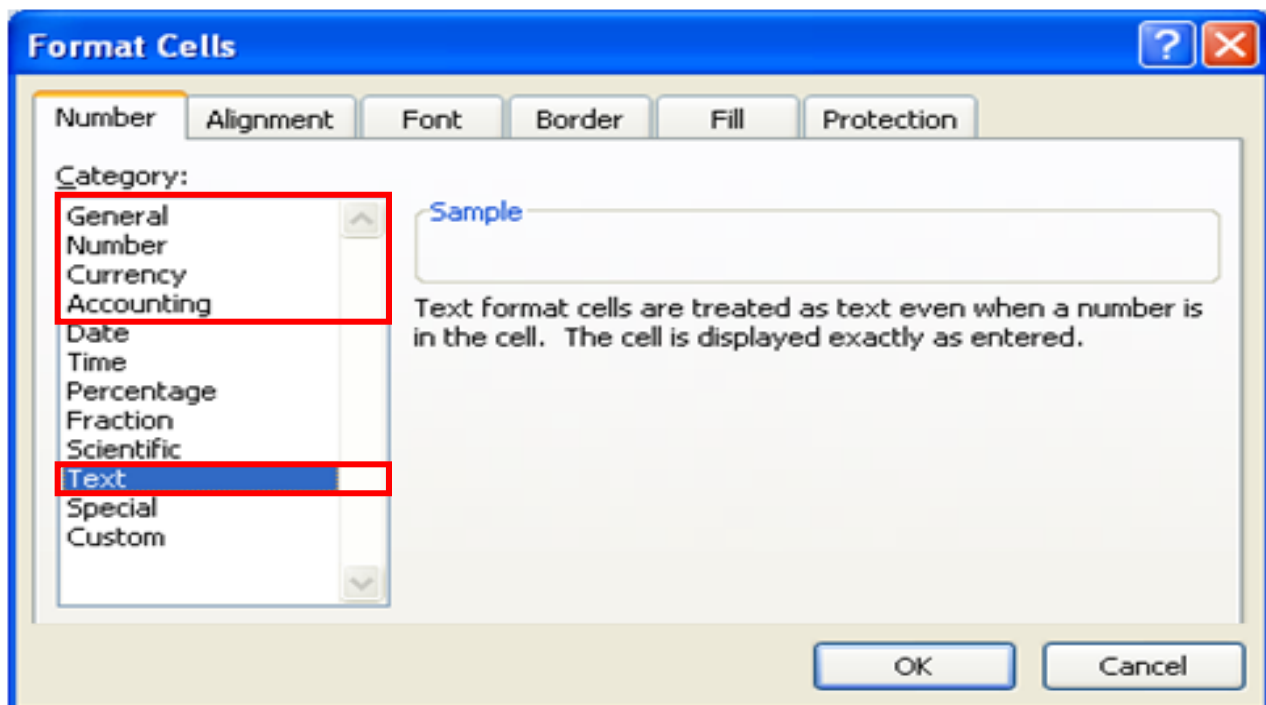


- Re-enter the agency number in cell **C1** including leading and ending zeros. **Agency number must be 5 digits and in 2 decimal format.**



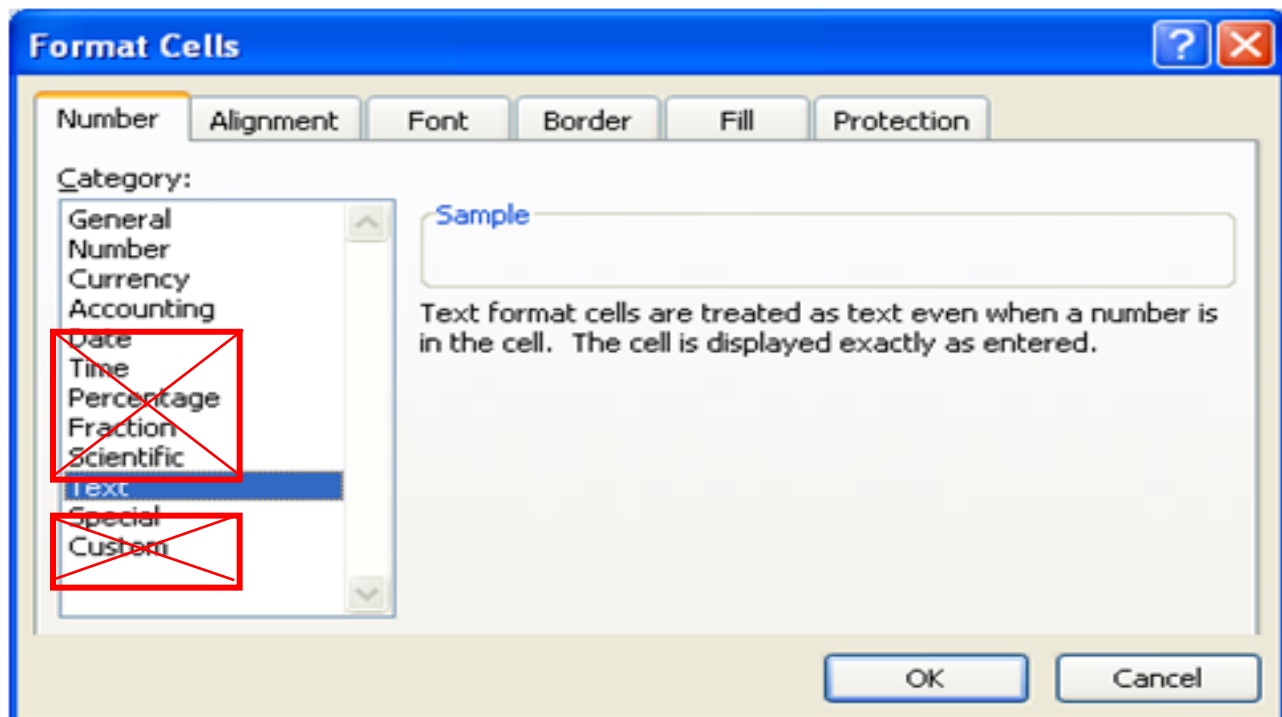
NOTE: The following **formats are accepted:**

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



NOTE: Do not use the following formats:

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



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

Do **not** include the following:

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

Book1 - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Developer

Paste Font Alignment Number Styles Cells Editing

C3

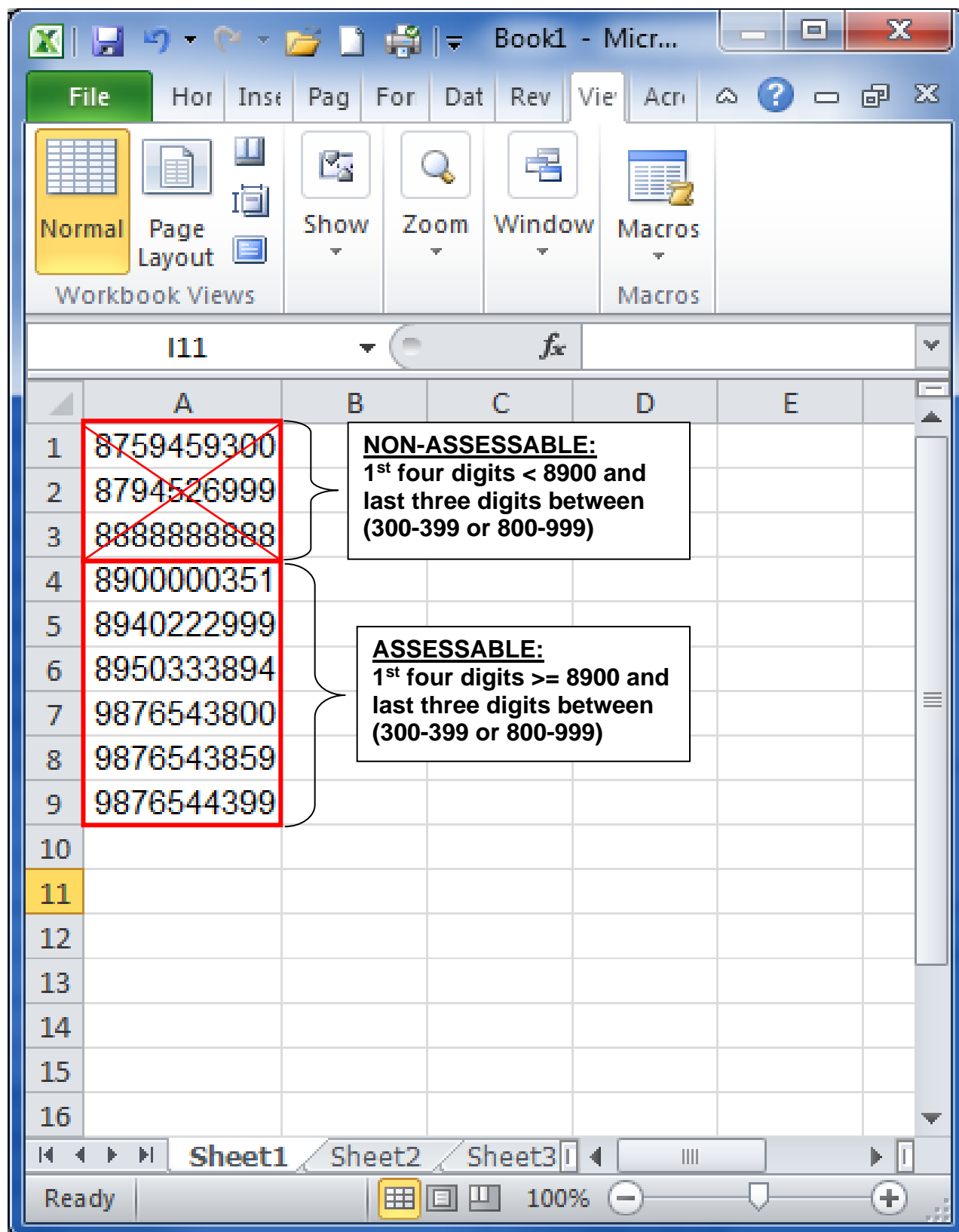
	A	B	C	D	F	G
1	PARCEL	AMOUNT	AGENCY #			
2	8765432100	1000.00	009.90			
3	8765432101	1000.00				
4	8765432102	1000.00				
5	8765432103	1000.00				
6	8765432104	1000.00				
7	8765432105	1000.00				
8	8765432106	1000.00				
9	8765432107	1000.00				
10	8765432108	10000.20				
11	8765432109	10000.25				
12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

Column 'E' should not be hidden

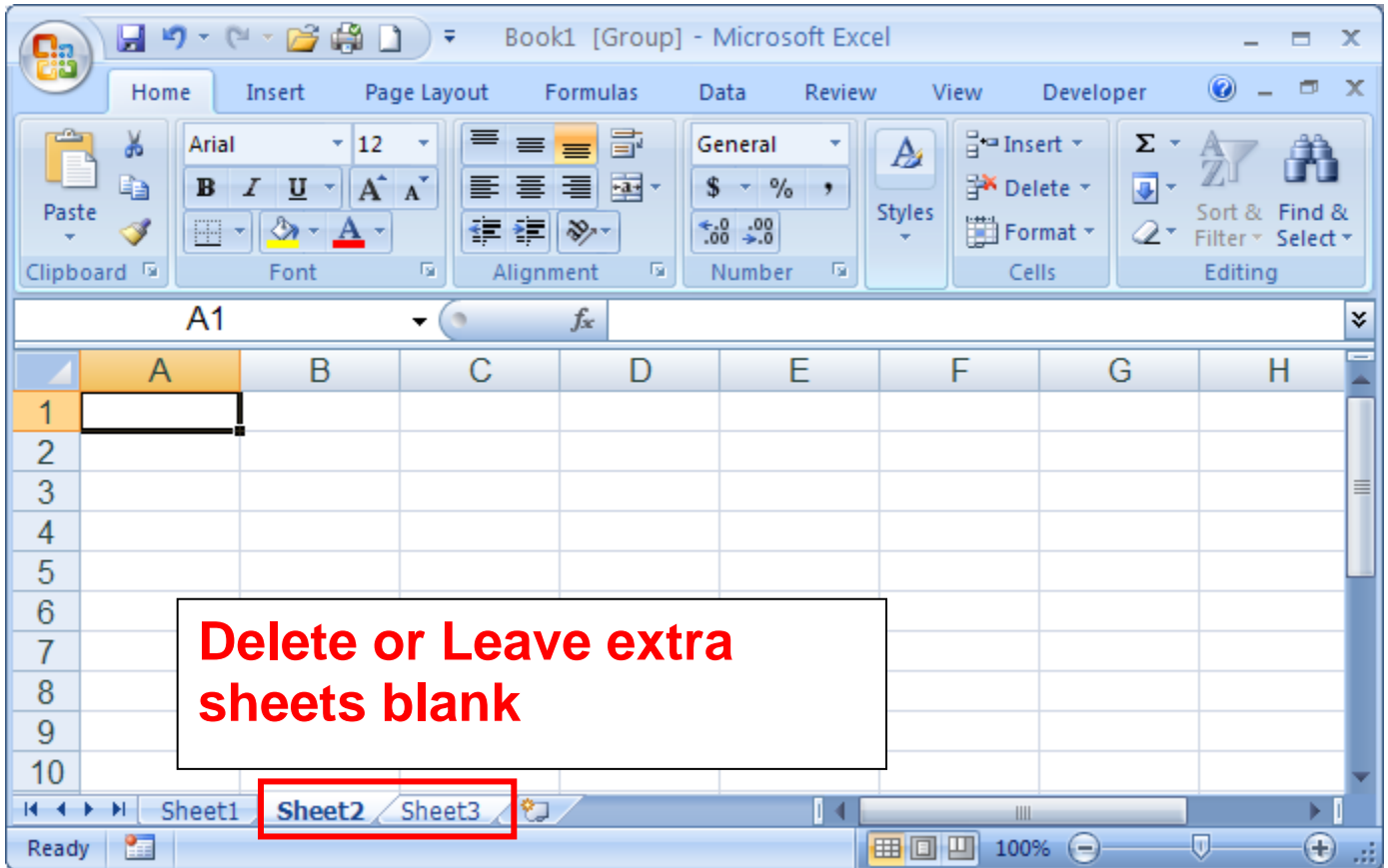
Sheet1 Sheet2 Sheet3

Ready 100%

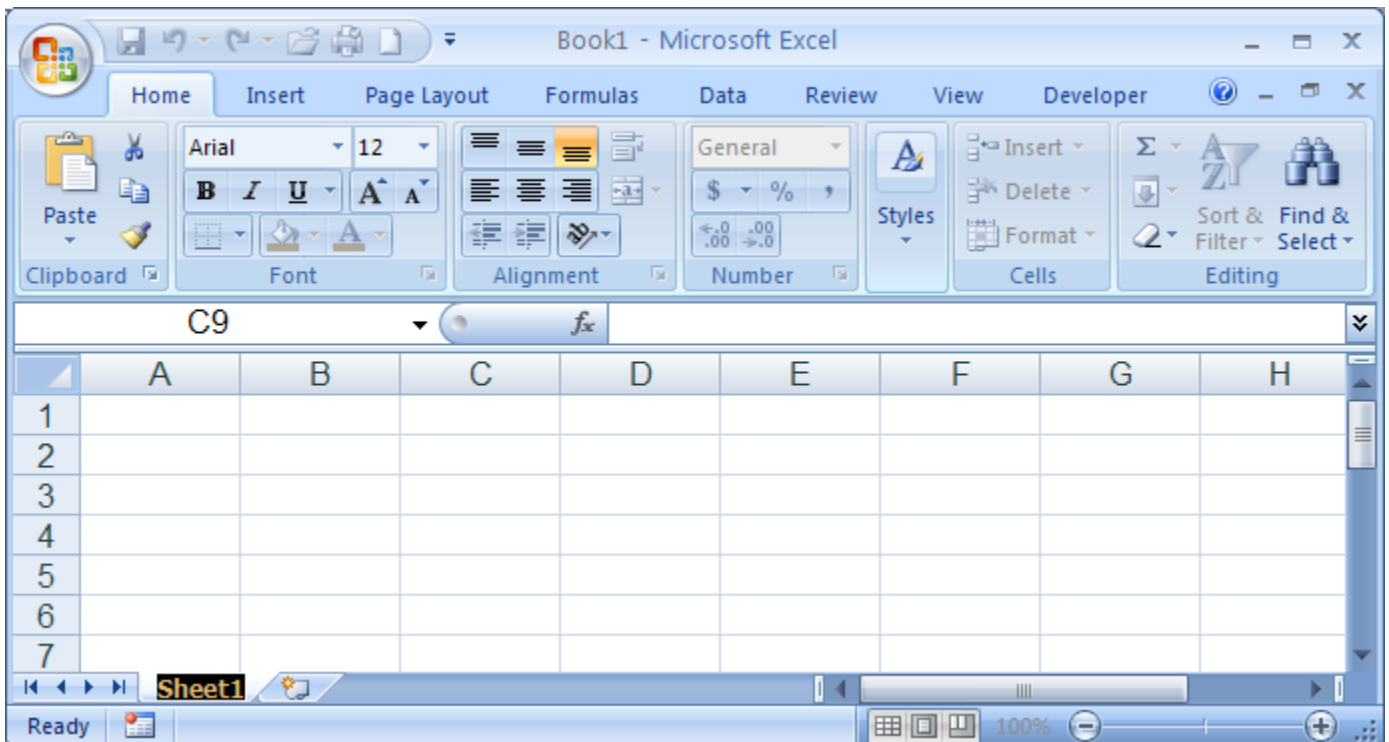
NOTE for DA, PU and COR files: Exclude parcels where the **first four digits are less than 8900** **AND** the last three digits end between (300-399 or 800-999). These **Non-assessable parcels** are government owned, and are exempt from Direct Assessments.



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



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



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

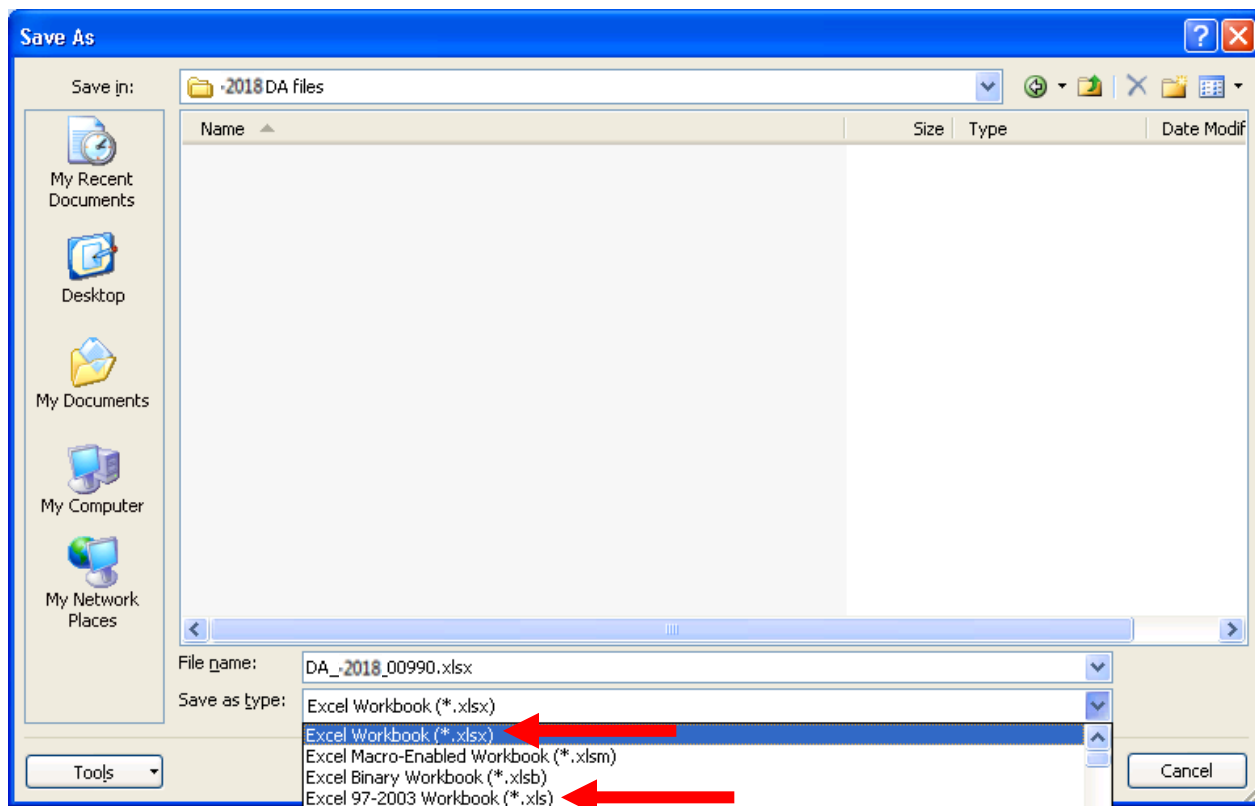
FIELD:	GUIDELINE:	EXAMPLE OF ERROR:
PARCEL	DA, PU and COR files: if the first four digits of the Parcel number is less than '8900' then the last 3 digits must not end in 300-399 or 800-999	5934820 883 8584827 999
	DA Exempt Parcel file: the first four digits of the Parcel number must be less than '8900' 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
	Must not exceed 99,999,999.99	1 23,456,789.01
ASSESSMENT AMOUNT		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	
		9999.9 99.999 9.9999 .99999
	Must be in two decimal format (XXX.XX)	
		9999
AGENCY NUMBER	Must be five digits	

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

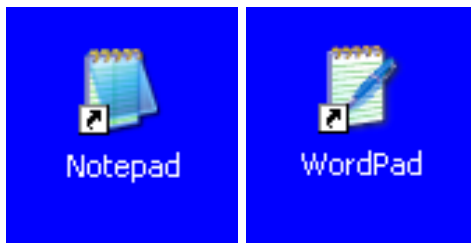


3E. Proceed to the following sections after the files have been formatted and saved.

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

CREATE THE TEXT INPUT DATA FILE

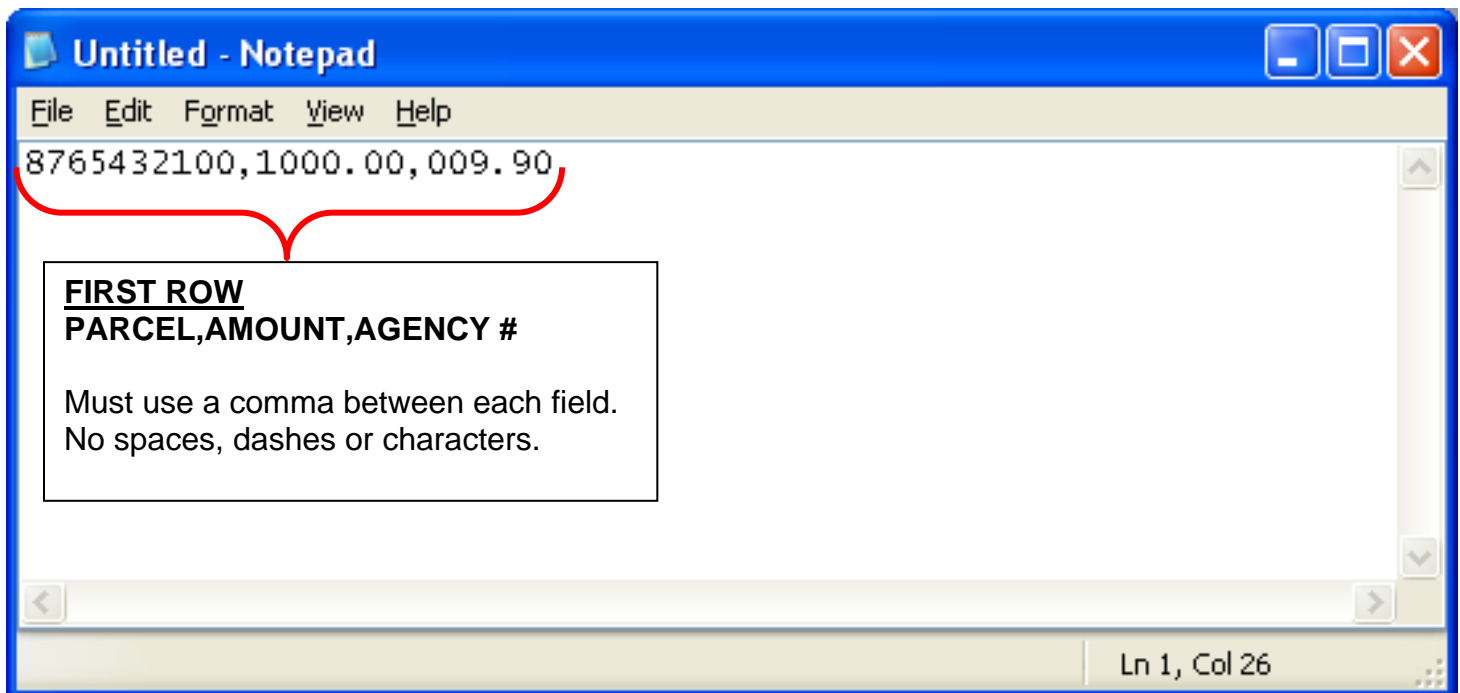
4A. Open Notepad or WordPad



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

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

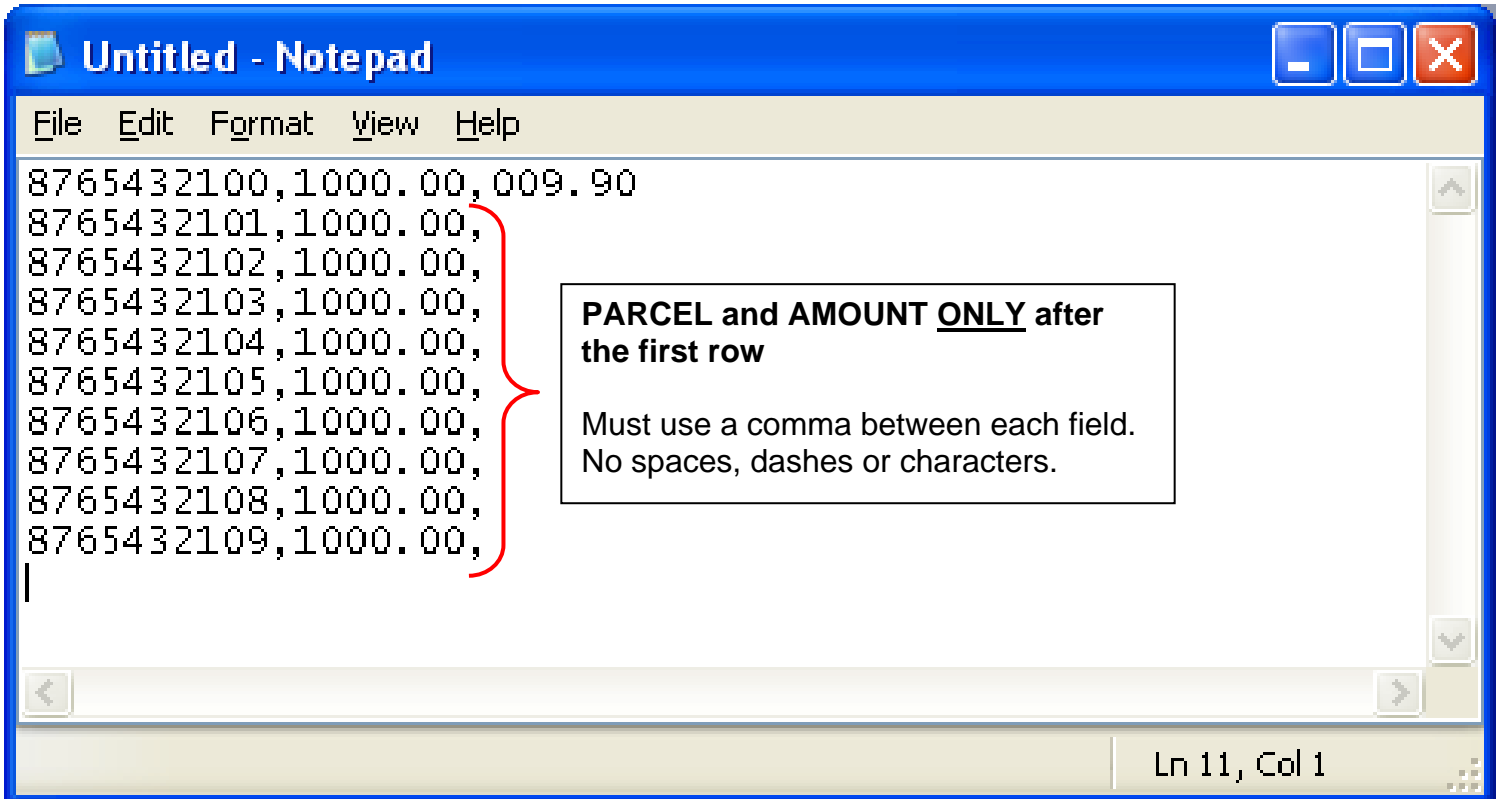
NOTE: Must use a comma between each field. Use commas only. Also, do **not** use any spaces, letters, dashes or special symbols or characters (!, @, #, \$, %, ^, &, *, etc)



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

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

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



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

FIELD:	GUIDELINE:	EXAMPLE OF ERROR:
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
	Must not exceed 99,999,999.99	1 23,456,789.01
ASSESSMENT AMOUNT		1,234.5 H
	Must be all numeric (No letters or special characters such as \$,&,%,* , !, #, @, etc.)	\$ 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	
		9999.9
	Must be in two decimal format (XXX.XX)	99.999 9.9999 .99999
		9999
AGENCY NUMBER	Must be five digits	

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



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

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

UPLOAD ORIGINAL DIRECT ASSESSMENT AND PUBLIC UTILITY FILES

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

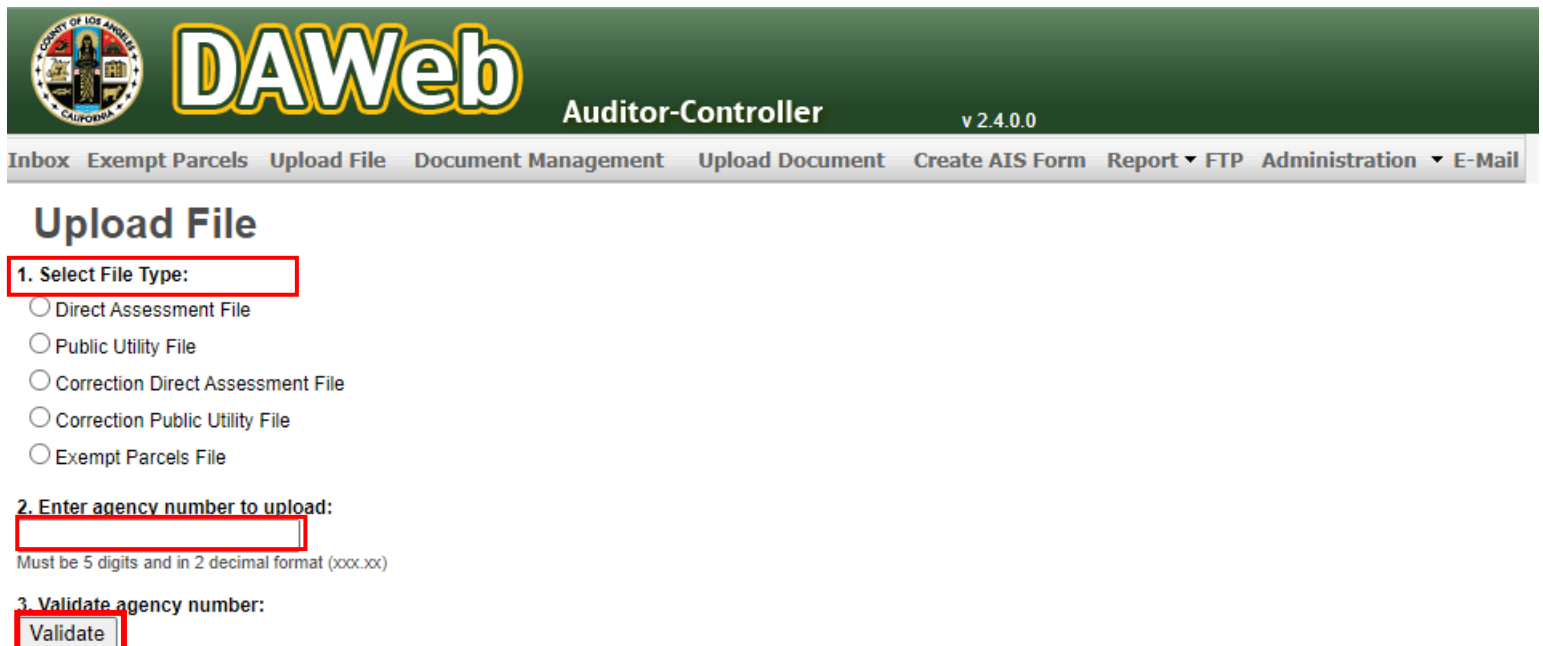
5A. To upload a file, click the Upload File tab.



The screenshot shows the DAWeb Auditor-Controller interface. The header includes the County of Los Angeles logo, the DAWeb logo, the title 'Auditor-Controller', version 'v 2.3.3.4', and user information 'Options | Log Out | Help' and 'Welcome, Agency User'. The navigation menu has tabs: 'Inbox', 'Exempt Parcels', 'Upload File' (highlighted with a red box), 'Document Management', 'Upload Document', and 'Create AIS Form'. The 'Inbox' section displays a note: 'NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file'. Below the note are buttons for 'Open Search Panel', 'Submit', and 'Refresh'. A table header is visible with columns: 'Fiscal Year', 'Agency #', 'File Type', 'TXN Count', 'Total DA AMT', 'Valid', 'Status', 'Upload Date', 'Submit Date', 'Docs', 'Report', and 'Action'. The table content shows 'There are no records available.' and pagination information 'Records: 0 - 0 of 0 - Pages: 1'.

5B. Perform the following upload steps:

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



The screenshot shows the DAWeb Auditor-Controller interface for the 'Upload File' page. The header includes the County of Los Angeles logo, the DAWeb logo, the title 'Auditor-Controller', version 'v 2.4.0.0', and navigation links: 'Inbox', 'Exempt Parcels', 'Upload File' (highlighted), 'Document Management', 'Upload Document', 'Create AIS Form', 'Report', 'FTP', 'Administration', and 'E-Mail'. The main heading is 'Upload File'. The first step, '1. Select File Type:', is highlighted with a red box and includes radio button options: 'Direct Assessment File', 'Public Utility File', 'Correction Direct Assessment File', 'Correction Public Utility File', and 'Exempt Parcels File'. The second step, '2. Enter agency number to upload:', is followed by a text input field (highlighted with a red box) and a note: 'Must be 5 digits and in 2 decimal format (xxx.xx)'. The third step, '3. Validate agency number:', is followed by a 'Validate' button (highlighted with a red box).

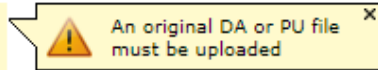
NOTE: An original Direct Assessment or Public Utility file must be uploaded before a Correction file can be uploaded for the same agency number. To upload a correction file, go to 'Upload Correction File and Correction Data Transmittal' section (P. 100).



Upload File

1. Select File Type:

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

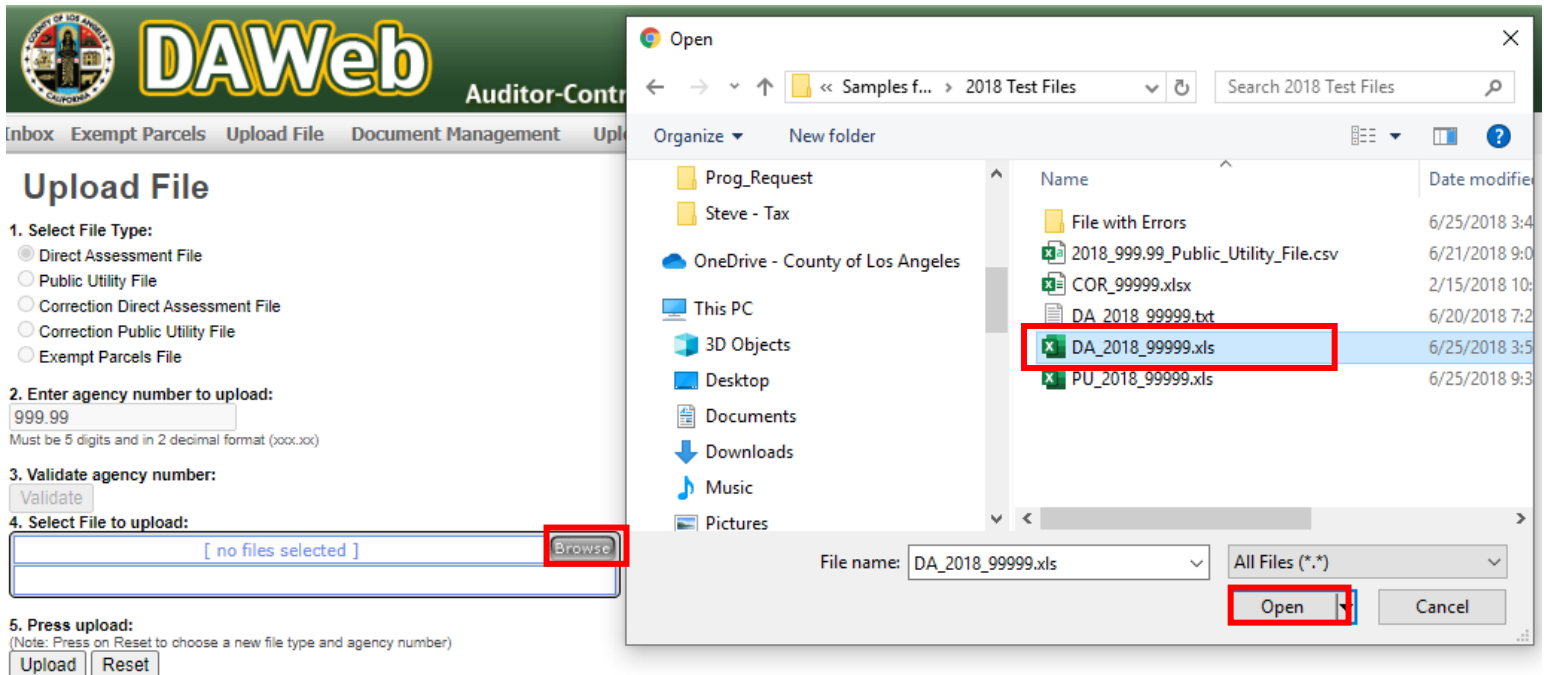


2. Enter agency number to upload:

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

3. Validate agency number:

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



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.

The screenshot shows the 'Upload File' form with the following steps and annotations:

- 1. Select File Type:** Radio buttons for Direct Assessment File, Public Utility File, Correction Direct Assessment File, Correction Public Utility File, and Exempt Parcels File.
- 2. Enter agency number to upload:** Text input field containing '999.99'. Below it, a note says 'Must be 5 digits and in 2 decimal format (xxx.xx)'.
- 3. Validate agency number:** A 'Validate' button.
- 4. Select File to upload:** A file selection area. A red box highlights the file name 'DA_2018_99999.xls' and the file size '351.50kB'. A red arrow points from a text box to this area. The text box says: 'Move the cursor over the white area to display the file name'. A 'Browse' button is also visible.
- 5. Press upload:** A note says '(Note: Press on Reset to choose a new file type and agency number)'. Below it are 'Upload' and 'Reset' buttons. The 'Upload' button is highlighted with a red box.

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.

The screenshot shows the 'Upload File' form after a successful upload. The 'Upload' button is highlighted with a red box. Below it, a red box contains the message: 'Successfully uploaded files: DA_2018_99999.xls'.

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

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

Upload File

1. Select File Type:

☐ Direct Assessment File

☒ Public Utility File

☐ Correction Direct Assessment File

☐ Correction Public Utility File

☐ Exempt Parcels File

2. Enter agency number to upload:

999.99

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

3. Validate agency number:

Validate

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

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

Upload File

1. Select File Type:

☐ Direct Assessment File

☒ Public Utility File

☐ Correction Direct Assessment File

☐ Correction Public Utility File

☐ Exempt Parcels File

2. Enter agency number to upload:

999.99

Must be 5 digits and in 2 decimal format

3. Validate agency number:

Validate

4. Select File to upload:

[no files selected] Browse

5. Press upload:

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

Upload Reset

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

You entered:	999.99
	<input checked="" type="radio"/>
On file:	999.90
	<input type="radio"/>

Select Cancel

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

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

The screenshot shows the 'Upload File' form with the following sections:

- 1. Select File Type:** Radio buttons for Direct Assessment File, Public Utility File (selected), Correction Direct Assessment File, Correction Public Utility File, and Exempt Parcels File.
- 2. Enter agency number to upload:** Text input field containing '999.99' with a note: 'Must be 5 digits and in 2 decimal format (xxx.xx)'.
- 3. Validate agency number:** A 'Validate' button.
- 4. Select File to upload:** A file selection area showing '[no files selected]'.
- 5. Press upload:** 'Upload' and 'Reset' buttons.

An error message box is displayed over the form:

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

You entered:	999.99
On file:	888.88

• You do not have access to this AGENCY number

Select Cancel

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

The screenshot shows the 'Inbox' tab selected in the top navigation bar. The 'Upload File' form is visible with the following sections:

- 1. Select File Type:** Radio buttons for Direct Assessment File, Public Utility File (selected), Correction Direct Assessment File, Correction Public Utility File, and Exempt Parcels File.
- 2. Enter agency number to upload:** Text input field containing '999.99' with a note: 'Must be 5 digits and in 2 decimal format (xxx.xx)'.
- 3. Validate agency number:** A 'Validate' button.

At the bottom of the form, a message states: 'Successfully uploaded files: PU_2018_99999.xls'.

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

DAWeb Auditor-Controller v 2.4.0.0

Welcome, Test User

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

Open Search Panel Submit Refresh

1	2	3	4	5	6	7	8	9	1	1	1
Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
<input type="checkbox"/> 2018	999.99	DA	6,115	\$152,491,347.89	no	WORK IN PROGRESS	06/25/2018		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check In Delete
<input type="checkbox"/> 2018	999.99	PU	1,385	\$1,809,275.89	yes	SENT TO MAINFRAME	06/25/2018	08/23/2018	3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

Records per page: 100

Records: 1 - 2 of 2 - Pages: 1

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 '**Correct the Data File in Edit Mode**' section (P. 66). Proceed to the next step if **Valid = 'yes'**.

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

DAWeb Auditor-Controller v 2.4.0.0

Options | Log Out | Help

Welcome, Test User

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

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

Open Search Panel Submit Refresh

Records: 1 - 2 of 2 - Pages: 1

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

Records per page: 100

Records: 1 - 2 of 2 - Pages: 1

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

DAWeb Auditor-Controller v 2.4.0.0

Options | Log Out | Help

Welcome, Test User

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

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

Open Search Panel Submit Refresh

Records: 1 - 2 of 2 - Pages: 1

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

Records per page: 100

Records: 1 - 2 of 2 - Pages: 1

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

2018 PARCEL CHANGE FILE PARCEL CHANGE REPORT RUN DATE 06/25/2018
 AGENCY NUMBER 999.99 UPLOAD DATE 06/25/2018

TOTAL OLD PARCEL CNT: 0
 TOTAL NEW PARCEL CNT: 0
 FILE TYPE: Public Utility File
 FILE NAME: PU_2018_99999.xls

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

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)

2018 PARCEL CHANGE FILE PARCEL CHANGE REPORT RUN DATE 06/19/2018
 AGENCY NUMBER 999.99 UPLOAD DATE 06/07/2018

TOTAL OLD PARCEL CNT: 13
 TOTAL NEW PARCEL CNT: 11
 FILE TYPE: Direct Assessment File
 FILE NAME: DA_2018_99999.xls

ID	PCL	FORMAT	STATUS	AGENCY NUMBER	DA	AMOUNT
212021412005002	5808019016	M1	O	999.99	150.00	
212021412005002	5808019020	M1	N		0	
212050119001001	5811003008	M1	O	999.99	150.00	
212050119001001	5811003009	M1	O	999.99	150.00	
212050119001001	5811003014	M1	N		0	

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.

DAWeb Auditor-Controller v 2.4.0.0

Options | Log Out | Help

Welcome, Test User

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

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

Open Search Panel Submit Refresh

Records: 1 - 2 of 2 - Pages: 1

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

Records per page: 100

Records: 1 - 2 of 2 - Pages: 1

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.

File History/Detail Report

Back

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA_2018_99999.xls

File History

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

Records: 1 - 1 of 1

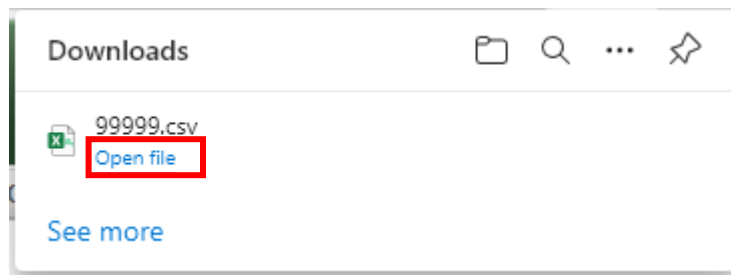
Detail Report

Export Transactions to File

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

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

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

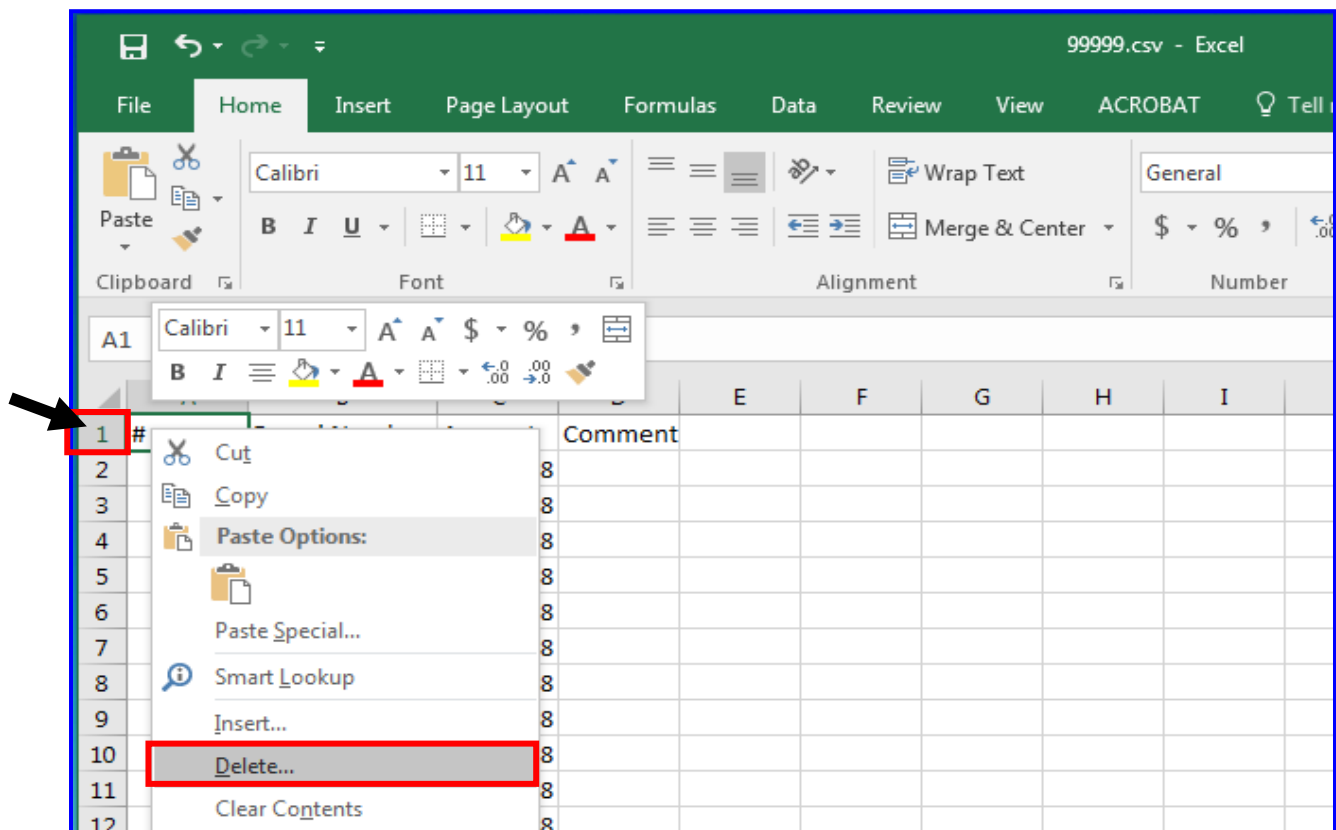


- 5O. Locate the rows that have comments/error messages and update the parcel number and/or amount containing the error.

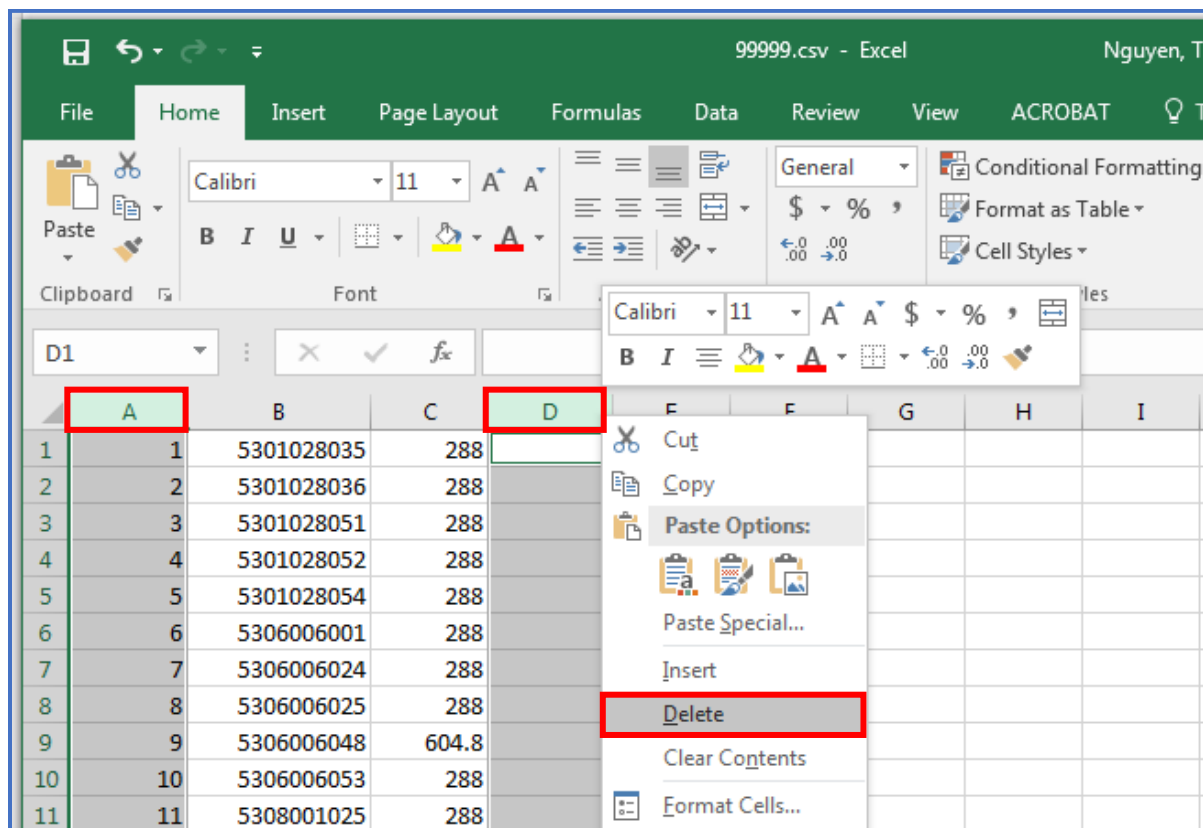
The screenshot shows an Excel spreadsheet with the following data:

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

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

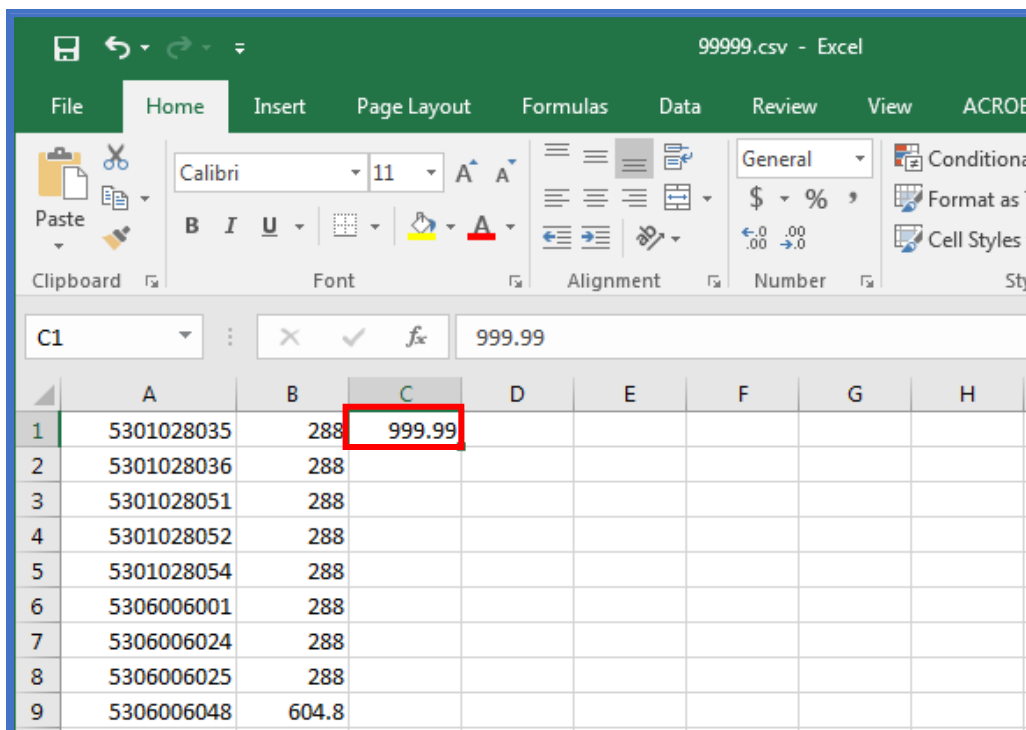


5Q. To delete the Line number and Comment columns, right click on columns 'A' and 'D' and select **Delete** from the pop-up window.

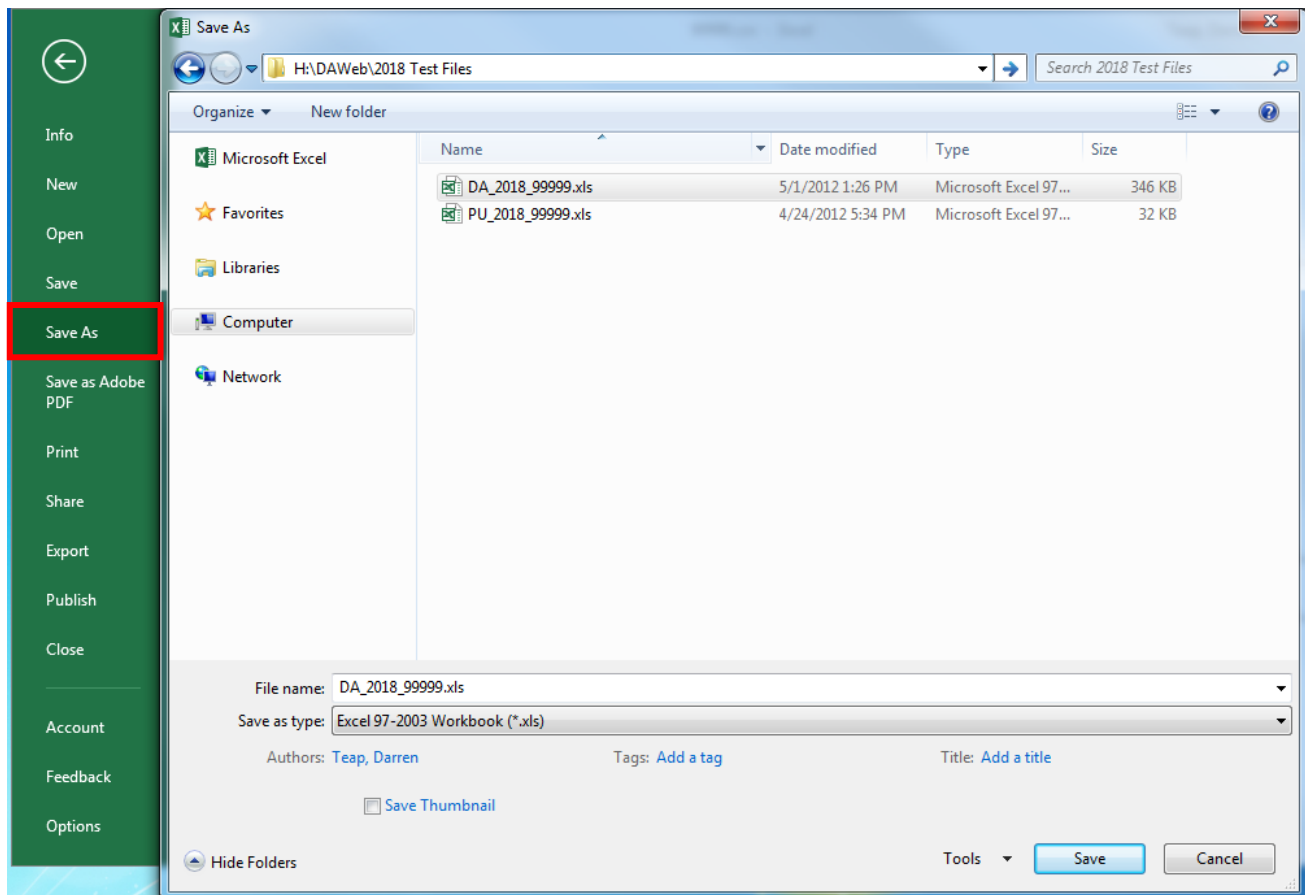


5R. Enter the agency number in cell 'C1'.

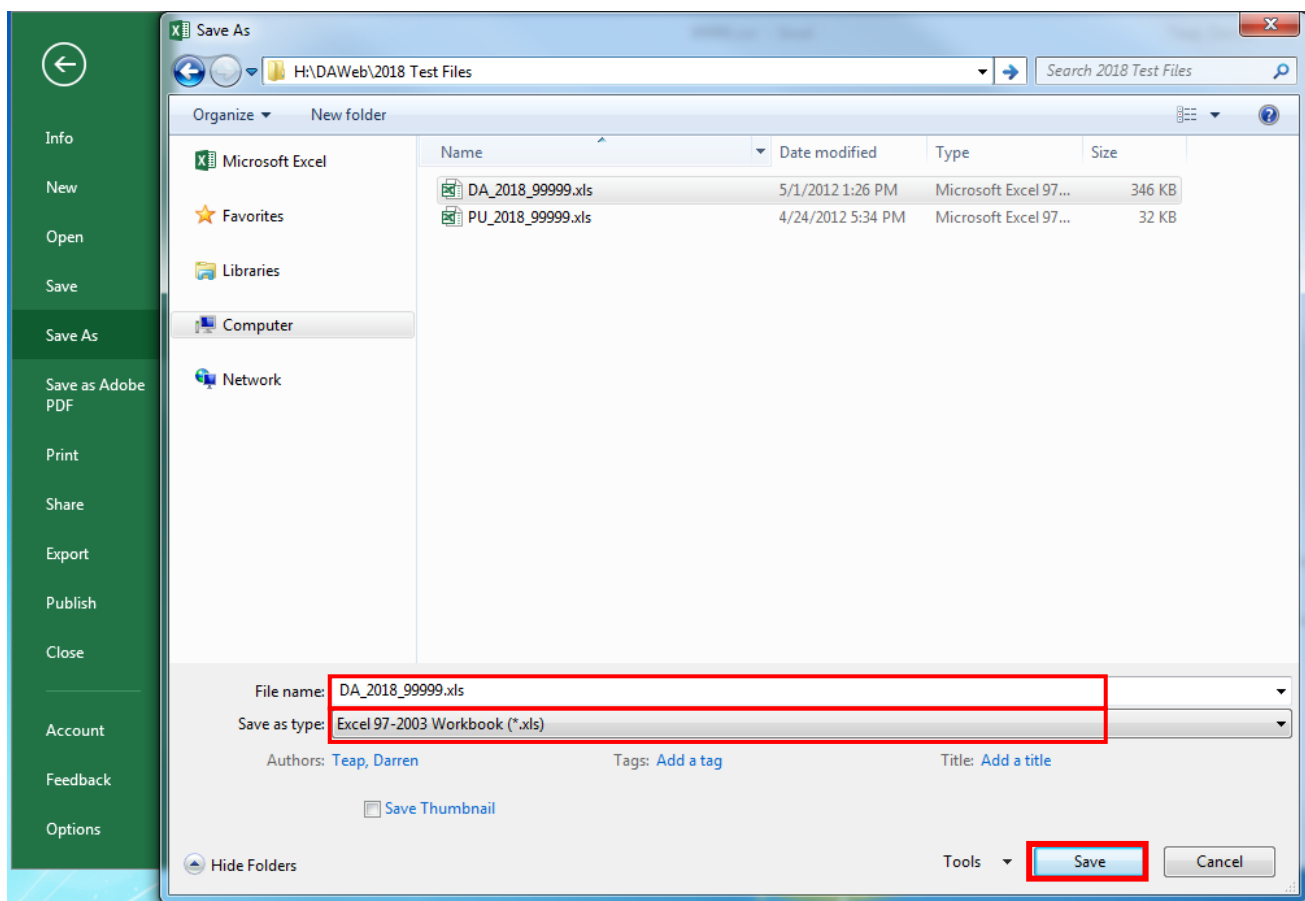
NOTE: Format cell C1 to Text format if your account number contains leading and/or ending zeros.



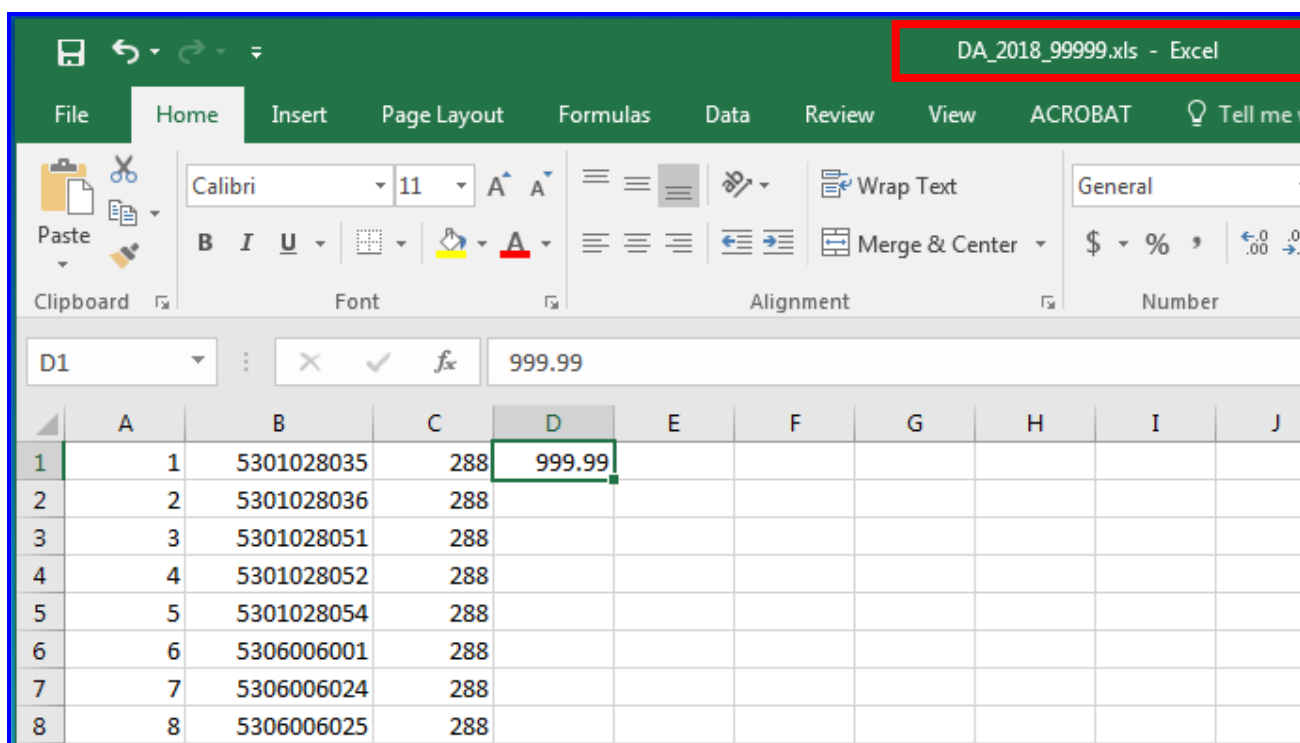
5S. From the menu bar, select **File**, **Save As**.



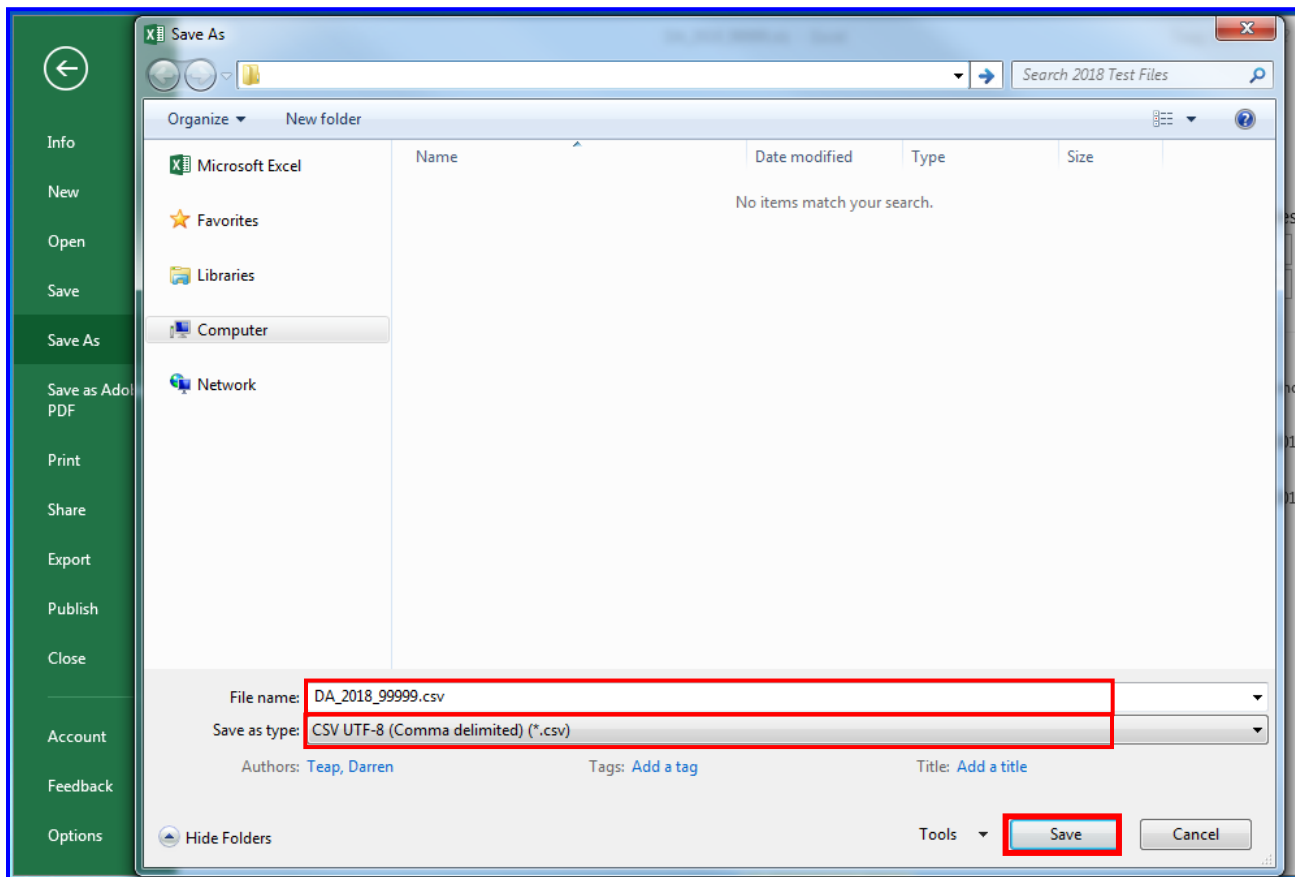
- 5T. To save as Excel file, choose a location where you want to save the file, rename the file, in the drop-down menu select '**Save as type**' as Excel Workbook (.xls or .xlsx) and click the **Save** button. To save as a Text file, skip to **step 5V**.



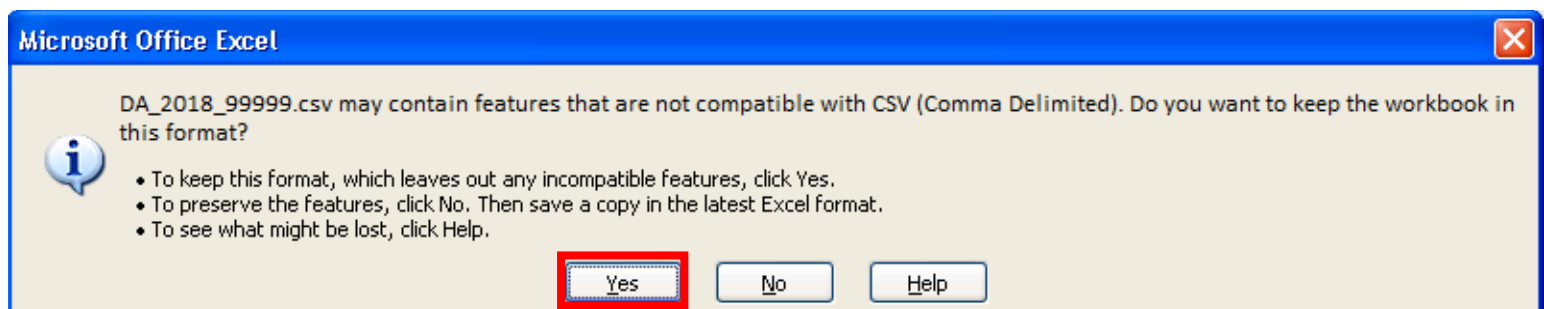
- 5U. The Detail file extension has been updated to **.xls** in the example below.



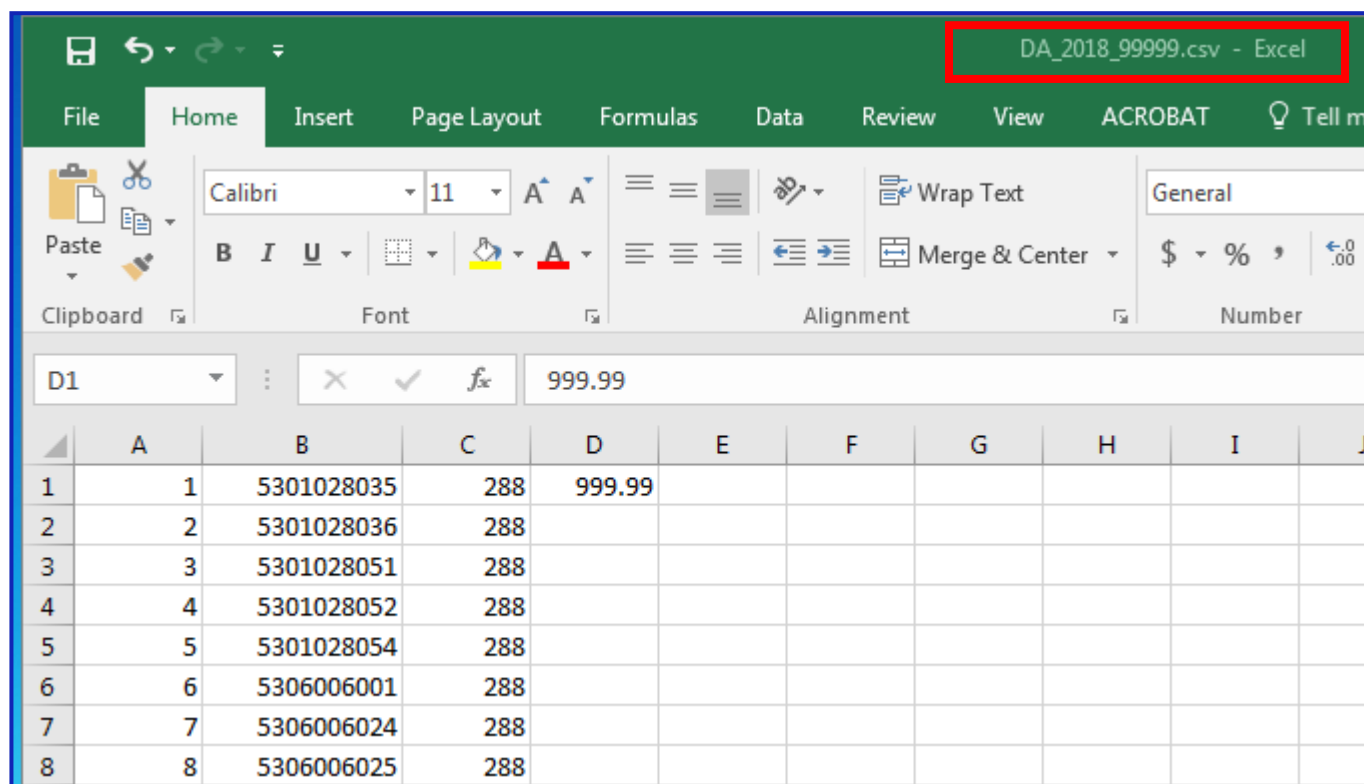
5V. To save as Text file, choose a location where you want to save the file, rename the file, select **CSV (Comma delimited)(*.csv)** in the 'Save as type' drop-down box and click the **Save** button.



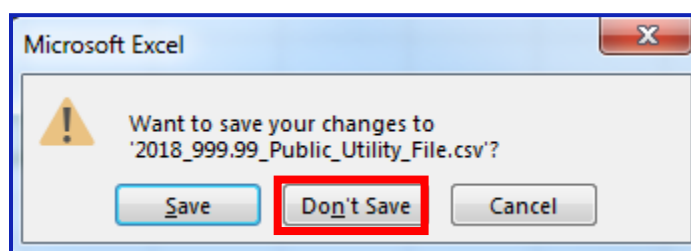
5W. Click the **Yes** button when the pop-up message appears.



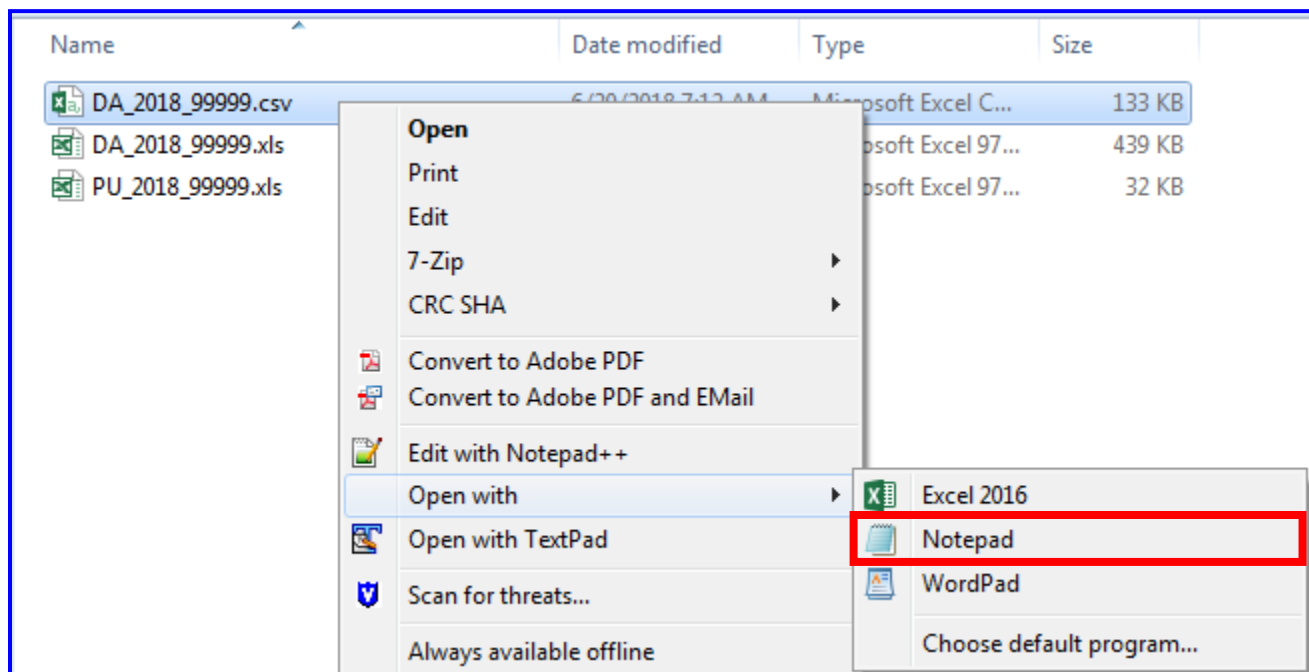
5X. The Detail file extension has been updated to **.csv** in the example below. Click the 'X' to close the application.



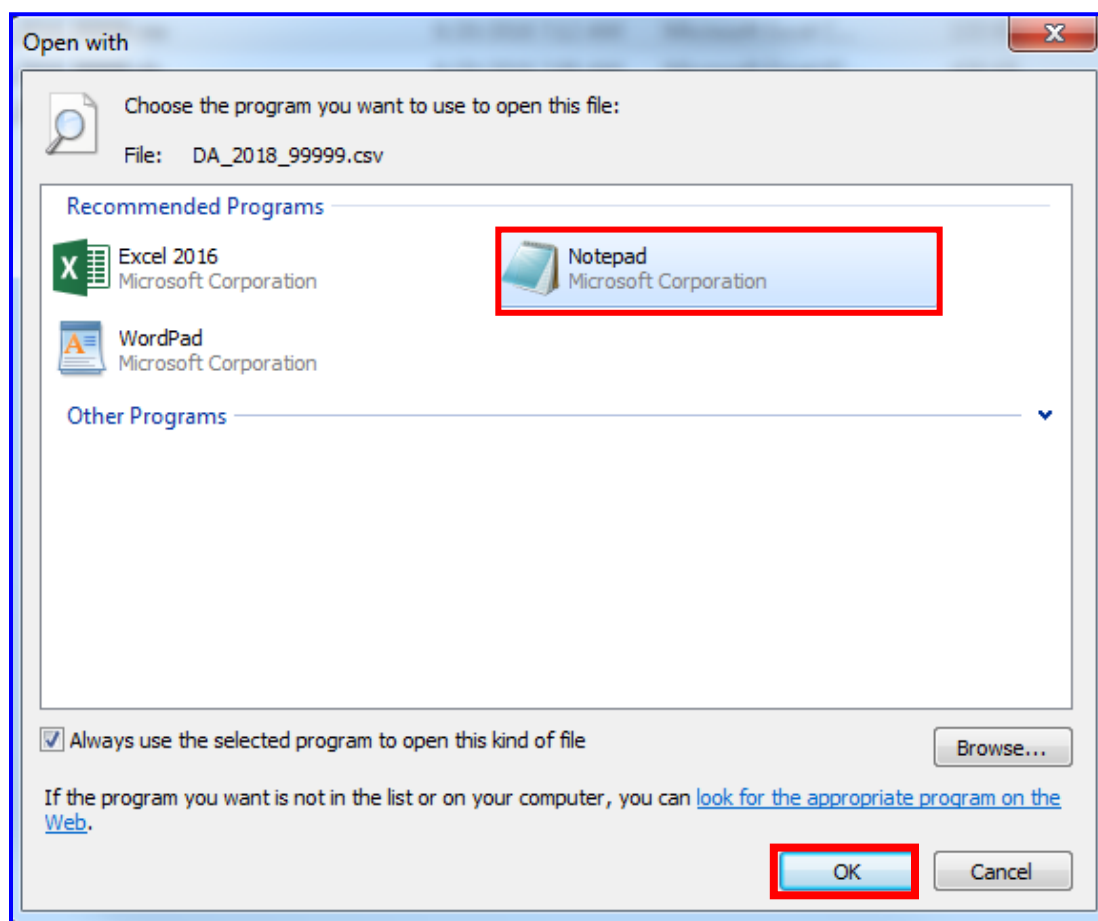
5Y. Click the **NO** button when the pop-up message appears.



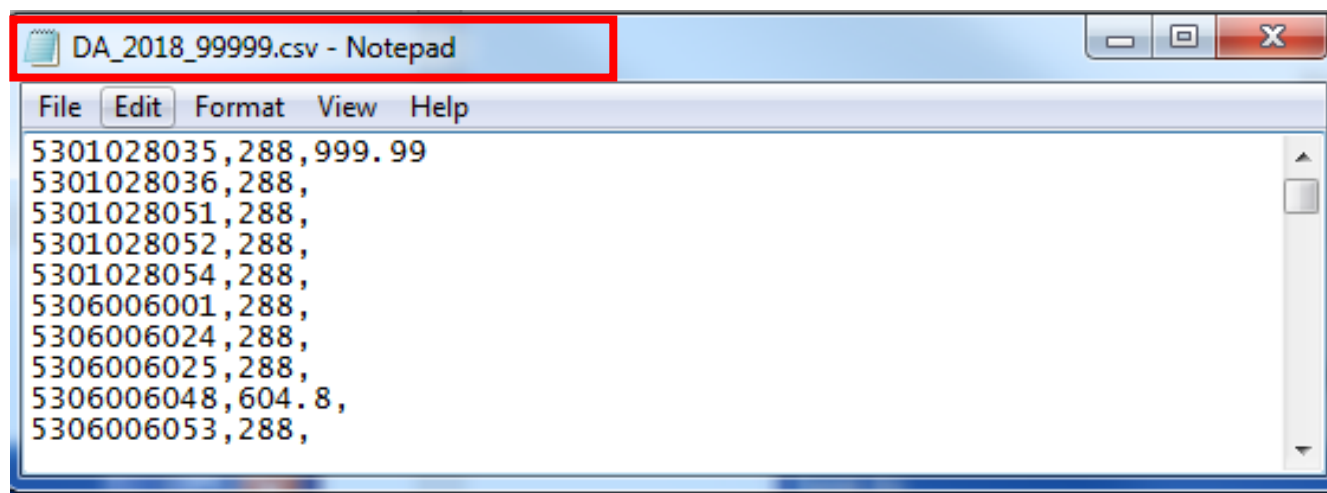
- 5Z. Locate the folder where you saved the .csv file, right click on the file and select **Open With, Choose Program...**



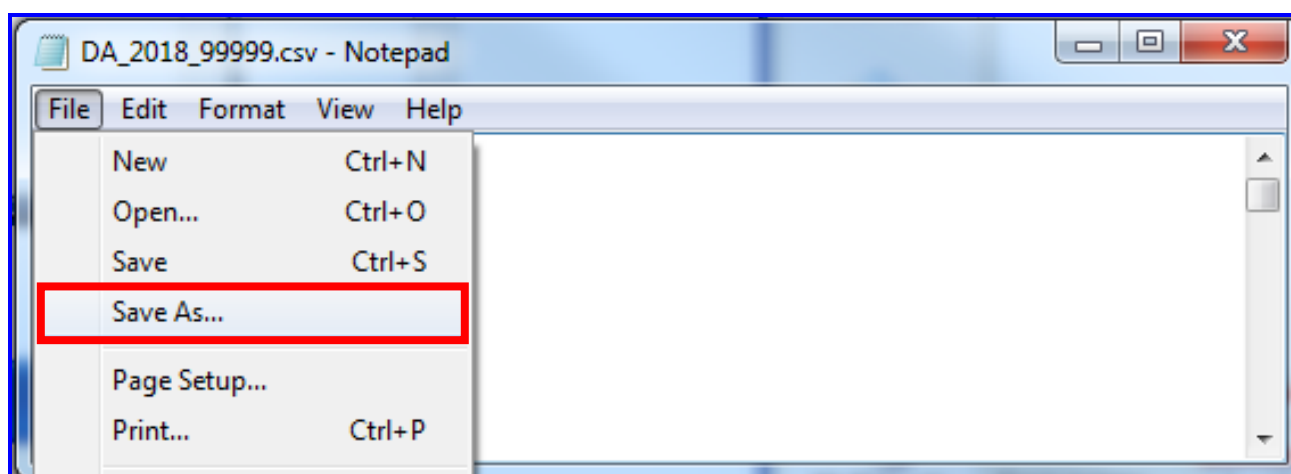
- 5AA. Select **Notepad** and click the **OK** button.



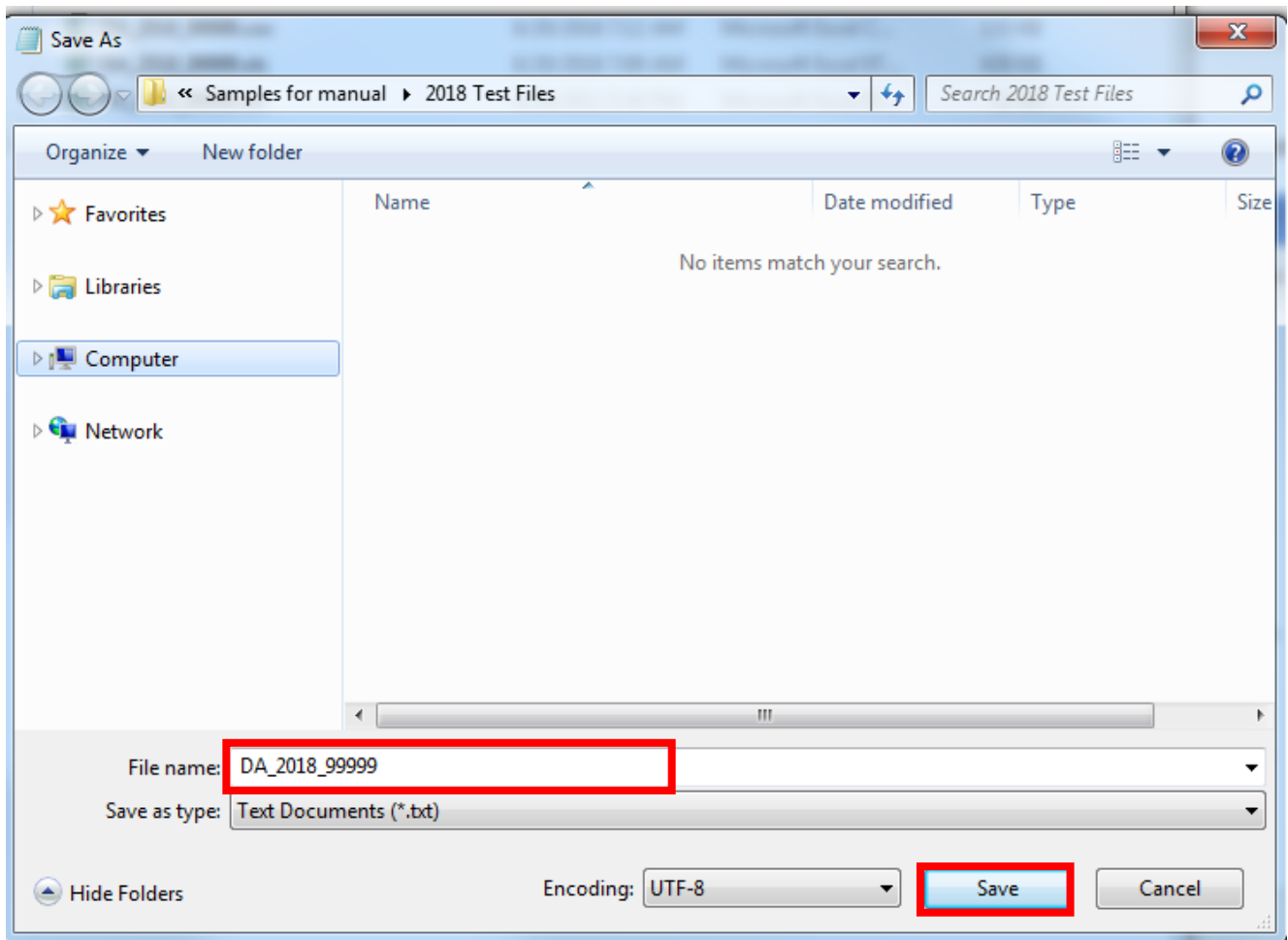
5BB. The .csv file will open in **Notepad**.



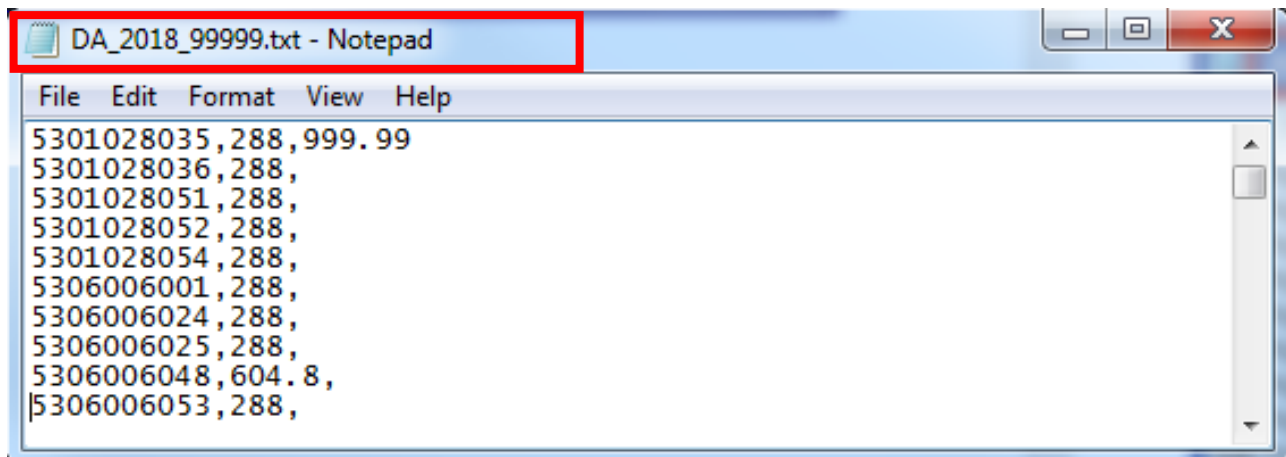
5CC. To save as .txt file, click **File, Save As...**



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



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



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

The screenshot shows the DAWeb Auditor-Controller interface. At the top, there's a header with the County of Los Angeles logo, 'DAWeb Auditor-Controller v 2.4.0.0', and user information 'Welcome, Test User'. Below the header is a navigation bar with links: 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. The 'Inbox' section is active, displaying a table of uploads. A red box highlights the 'Report' column in the table header. Another red box highlights the 'Data Transmittal' link in the 'Report' column for the second record. The table has columns: Fiscal Year, Agency #, File Type, TXN Count, Total DA AMT, Valid, Status, Upload Date, Submit Date, Docs, Report, and Action. The first record is for Fiscal Year 2018, Agency # 999.99, File Type DA, TXN Count 6,115, Total DA AMT \$152,491,347.89, Valid 'no', Status 'WORK IN PROGRESS', Upload Date 06/25/2018, Submit Date, Docs 3, and Report 'PCL CHG RPT Data Transmittal History/Detail Report Exception Report'. The second record is for Fiscal Year 2018, Agency # 999.99, File Type PU, TXN Count 1,385, Total DA AMT \$1,809,275.89, Valid 'yes', Status 'SENT TO MAINFRAME', Upload Date 06/25/2018, Submit Date 08/23/2018, Docs 3, and Report 'PCL CHG RPT Data Transmittal History/Detail Report Exception Report'. Below the table, there's a 'Records per page' dropdown set to 100 and a 'Records: 1 - 2 of 2 - Pages' indicator.

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.

The screenshot shows a 'Data Transmittal' form. At the top, it says 'DATE: June 25, 2018' and 'TO: Department of Auditor-Controller, Property Tax Services Division, Direct Assessment Unit'. Below this is a red-bordered box containing the following fields: 'FILE TYPE: Public Utility File', 'AGENCY ACCOUNT NUMBER: 999.99', 'BILL DESCRIPTION: Test Agency', 'TOTAL ASSESSMENT AMOUNT: \$1,809,275.89', and 'TOTAL PARCEL COUNT: 1,385'. Below the red box is a statement: '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)'. Below the statement is another red-bordered box containing the following fields: '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: _____', and 'Email Address: _____'.

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

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



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Welcome, Test User

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Inbox

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

[Open Search Panel](#) [Submit](#) [Refresh](#)

Records: 1 - 2 of 2 - Pages: 1

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

Records per page: 100

Records: 1 - 2 of 2 - Pages: 1

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.

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Welcome, Test User

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

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

Open Search Panel Submit Refresh

Records: 1 - 2 of 2 - Pages: 1

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

Records per page: 100

Records: 1 - 2 of 2 - Pages: 1

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

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Welcome, Agency User

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

Edit DA File

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA_2018_99999.xls

Remark


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

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

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**.



DAWeb

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Options | Log Out | Help

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Edit DA File

Action

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA_2018_99999.xls


Remark

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

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

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

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



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v 2.3.3.4

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Edit DA File

Action [Select One]

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA_2018_99999.xls

Remark


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


Show Filter - Records: 1 - 50 of 6115 - Pages: [1](#) [2](#) [3](#) [4](#) [5](#)

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

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	2348654 <u>301</u> 5934820 <u>883</u> 8584827 <u>999</u>	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 <u>K</u> 00 876 <u>\$</u> 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'	<u>9</u> 876543210	8765432100
Parcel number must start with '9' for PU file	PU file must start with '9'	<u>8</u> 765432100	9876543210
Direct Assessment Amount exceeds the limit of 99,999,999.99	Must not exceed 99,999,999.99	<u>1</u> 23,456,789.01	23,456,789.01
Invalid Direct Assessment Amount	Not all numeric	1,234.5 <u>H</u>	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 <u>Z</u>	1234.57
Only corrections can have \$0 value	DA or PU files can not contain \$0 Amount	\$0 in DA/PU file	Update amount or delete record

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



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Edit DA File


Action [Select One] ▼

Fiscal Year 2018
 Agency Number 999.99
 File Type Direct Assessment File
 File Name DA_2018_99999.xls
 Remark

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

Show Filter - Records: 1 - 50 of 5988 - Pages: 1 2 3 4 5				
#	▲	Parcel Number	Amount	Comment ▼
1		5658008017	150.00	Edit Delete
2		5657022011	15000	Edit Delete
3		581200601	150.00	• Parcel number must be 10 digits Edit Delete
4		581200601G	150.00	• Parcel number must be all numeric Edit Delete
5		5812006020	150.00	Edit Delete
6		5812006020	150.00	• Duplicate Parcel Edit Delete
7		5820009014	150150150.00	• Direct assessment amount exceeds the limit of 99,999,999.99 Edit Delete
8		5808009024	150.0A	• Invalid Direct Assessment Amount Edit Delete
9		5812014024	0.00	• Only corrections can have \$0 value Edit Delete
10		9806019009	150.00	• Parcel number cannot start with 9 for DA file Edit Delete
11		5657004002	-150.00	• Direct assessment amount must be positive Edit Delete
12		5657004003	150.005	• Amount cannot exceed two decimals:150.005 Edit Delete
13		5864 023 009	150.00	• Parcel number must be 10 digits • Parcel number must be all numeric Edit Delete

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



DAWeb

Auditor Controller

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Options | Log Out | Help

Welcome, Agency User

InboxExempt ParcelsUpload FileDocument ManagementUpload DocumentCreate AIS Form

Edit DA File

Action [Select One]

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA_2018_99999.xls

Remark


Sorted by Row

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

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

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

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



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Options | Log Out | Help

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

Edit DA File

Action

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA_2018_99999.xls

Remark


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

[Show Filter](#) Records: 1 - 50 of 5988 - Pages: [1](#) [2](#) [3](#) [4](#) [5](#)

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

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

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



DAWeb

Auditor Controller v2.2.2.4

Options | Log Out | Help

Welcome, Agency User

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

Edit DA File

Action [Select One]

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA_2018_99999.xls

Remark

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

[Apply Filter](#) [Hide Filter](#) - Records: 1 - 50 of 5988 - Pages: [1](#) | [2](#) | [3](#) | [4](#) | [5](#) | [6](#) | [7](#) | [8](#) | [9](#) | [10](#) | [11](#) | [12](#) | [13](#) | [14](#) | [15](#) | [16](#) | [17](#) | [18](#) | [19](#) | [20](#) | [21](#) | [22](#) | [23](#) | [24](#) | [25](#) | [26](#) | [27](#) | [28](#) | [29](#) | [30](#) | [31](#) | [32](#) | [33](#) | [34](#) | [35](#) | [36](#) | [37](#) | [38](#) | [39](#) | [40](#) | [41](#) | [42](#) | [43](#) | [44](#) | [45](#) | [46](#) | [47](#) | [48](#) | [49](#) | [50](#) | [51](#) | [52](#) | [53](#) | [54](#) | [55](#) | [56](#) | [57](#) | [58](#) | [59](#) | [60](#) | [61](#) | [62](#) | [63](#) | [64](#) | [65](#) | [66](#) | [67](#) | [68](#) | [69](#) | [70](#) | [71](#) | [72](#) | [73](#) | [74](#) | [75](#) | [76](#) | [77](#) | [78](#) | [79](#) | [80](#) | [81](#) | [82](#) | [83](#) | [84](#) | [85](#) | [86](#) | [87](#) | [88](#) | [89](#) | [90](#) | [91](#) | [92](#) | [93](#) | [94](#) | 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[1087](#) | [1088](#) |

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

Inbox

Exempt Parcels

Upload File

Document Management

Upload Document

Create AIS Form

Edit DA File

Action

[Select One]

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA_2018_99999.xls

Remark

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

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

#	Parcel Number	Amount	Comment	
	<div>Equal To</div> <div>5812006020</div>	<div>Equal To</div> <div></div>		
6	5812006020	150.00	• Duplicate Parcel	<div>Edit</div> <div>Delete</div>
5	5812006020	300.00		<div>Edit</div> <div>Delete</div>

Records per page: 50

Add New

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

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

#	Parcel Number	Amount	Comment	
	<div>Equal To</div> <div>5812006020</div>	<div>Equal To</div> <div></div>		
6	5812006020	150.00	• Duplicate Parcel	<div>Edit</div> <div>Delete</div>

Records per page: 50

Add New

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

#	Parcel Number	Amount	Comment	
	<div>Equal To</div> <div>5812006020</div>	<div>Equal To</div> <div></div>		
6	<div>5812006020</div>	<div>150.00</div>	• Duplicate Parcel	<div>Update</div> <div>Cancel</div>

Records per page: 50

Add New


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

#	Parcel Number	Amount	Comment	
	<div>Equal To</div> <div>5812006020</div>	<div>Equal To</div> <div></div>		
6	5812006020			<div>Edit</div> <div>Delete</div>

Records per page: 50

Add New

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



DAWeb

Auditor Controller v2.2.2.4

Welcome, Agency User

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

Edit DA File

Action [Select One]

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA_2018_99999.xls

Remark

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

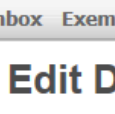
[Apply Filter](#) | [Hide Filter](#) | **[Remove Filter](#)** - Records: 1 - 50 of 5987 - Pages: [1](#) | [2](#) | [3](#) | [4](#) | [5](#)

#	Parcel Number	Amount	Comment
	Equal To <input type="text" value="5812006020"/>	Equal To <input type="text"/>	
6	5812006020	150.00	

Records per page: 50

[Edit](#) | [Delete](#) [Add New](#)

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



DAWeb

Auditor Controller v2.2.2.4

Welcome, Agency User

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

Edit DA File

Action [Select One]

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA_2018_99999.xls

Remark


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

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

#	Parcel Number	Amount	Comment
	Equal To <input type="text"/>	Equal To <input type="text"/>	
7	5820009014	150150150.00	• Direct assessment amount exceeds the limit of 99,999,999.99
8	5808009024	150.0A	• Invalid Direct Assessment Amount
9	5812014024	0.00	• Only corrections can have \$0 value
10	9806019009	150.00	• Parcel number cannot start with 9 for DA file

[Edit](#) | [Delete](#) [Add New](#)

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



DAWeb

Auditor Controller v2.2.2.4

Options | Log Out | Help

Welcome, Agency User

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

Edit DA File

Action [Select One]

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA_2018_99999.xls


Remark

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

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

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

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



DAWeb

Auditor Controller v2.2.2.4
Options | Log Out | Help

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

Edit DA File

Action [Select One]


Fiscal Year 2018
 Agency Number 999.99
 File Type Direct Assessment File
 File Name DA_2018_99999.xls
 Remark

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

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

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

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



DAWeb

Auditor Controller v2.2.2.4

Options | Log Out | Help

Welcome, Agency User

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

Edit DA File

Action [Select One]

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA_2018_99999.xls


Remark

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

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

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

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



DAWeb

Auditor Controller v2.2.2.4

Options | Log Out | Help

Welcome, Agency User

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

Edit DA File

Action [Select One]

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA_2018_99999.xls

Remark

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

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

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

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

35	5811015013	150.00	Edit Delete
36	5657009013	150.00	Edit Delete
37	5816003010	150.00	Edit Delete
38	5657025001	150.00	Edit Delete
39	5817033032	150.00	Edit Delete
40	5813005035	150.00	Edit Delete
41	5815003002	150.00	Edit Delete
42	5806009003	150.00	Edit Delete
43	5806019008	150.00	Edit Delete
44	5808013011	150.00	Edit Delete
45	5817017051	150.00	Edit Delete
46	5864021016	150.00	Edit Delete
47	5814024001	150.00	Edit Delete
48	5864009021	150.00	Edit Delete
49	5822031033	150.00	Edit Delete
50	5817038011	150.00	Edit Delete
Grand Total	Total TXN CNT 5,987	Total Amount \$898,050.00	
Records per page: 50 ▼ 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 OK** to delete or **Cancel** to keep the record.

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


Message from webpage

Are you sure you want to delete the parcel?

OK Cancel

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

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

**DAWeb**

Auditor-Controller

v 2.3.3.4

Options | Log Out | Help

Welcome, Agency User

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

Edit DA File

Action

Select OneGo Back to Inbox/Check InSubmit the File to the AuditorDeleteReset

Fiscal Year 2018

Agency Number 999.99

File Type Direct Assessment File

File Name DA_2018_99999.xls

Remark

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

DAWeb Auditor-Controller v2.4.0.0

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

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

Open Search Panel Submit Refresh

Records: 1 - 2 of 2 - Pages: 1

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

Records per page: 100

Records: 1 - 2 of 2 - Pages: 1

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

DAWeb Auditor-Controller v2.4.0.0

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

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

Open Search Panel Submit Refresh

Records: 1 - 2 of 2 - Pages: 1

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

Records per page: 100

Records: 1 - 2 of 2 - Pages: 1

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

Main Report

2018 PARCEL CHANGE FILE PARCEL CHANGE REPORT RUN DATE 06/25/2018

 AGENCY NUMBER 999.99 UPLOAD DATE 06/25/2018

TOTAL OLD PARCEL CNT: 0

TOTAL NEW PARCEL CNT: 0

FILE TYPE: Direct Assessment File

FILE NAME: DA_2018_99999.xls

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

Done Trusted sites 100%

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	Go to Upload Correction File and Correction Data Transmittal (P. 100)
• Submit parcel changes as corrections	

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

DAWeb Auditor-Controller v2.4.0.0

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

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

Open Search Panel Submit Refresh

Records: 1 - 2 of 2 - Pages: 1

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

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

- 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: **‘Upload Legal Documents’** section (P.87).



DAWeb
Auditor-Controller
v 2.4.0.0

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

Inbox

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

[Open Search Panel](#) [Submit](#) [Refresh](#)

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

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

Records per page: 100 >>

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

UPLOAD LEGAL DOCUMENTS

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

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

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

DAWeb Auditor-Controller v 2.4.0.0

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

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

Open Search Panel Submit Refresh

Records: 1 - 2 of 2 - Pages: 1

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

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

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

DAWeb Auditor-Controller v 2.3.3.4 Options | Log Out | Help

Welcome, Agency User

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

Upload Document

1. Select document type:

[Select One] ↑

[Select One]

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

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

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

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

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

Options | Log Out | Help

Welcome, Agency User

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

Upload Document

1. Select document type:

Billing Agreement

2. Select agency number to upload:

444.44 555.55 666.66 777.77 888.88 > 999.90

> 999.95 > 999.97 > 999.98 > 999.99

3. Validate selected agency number

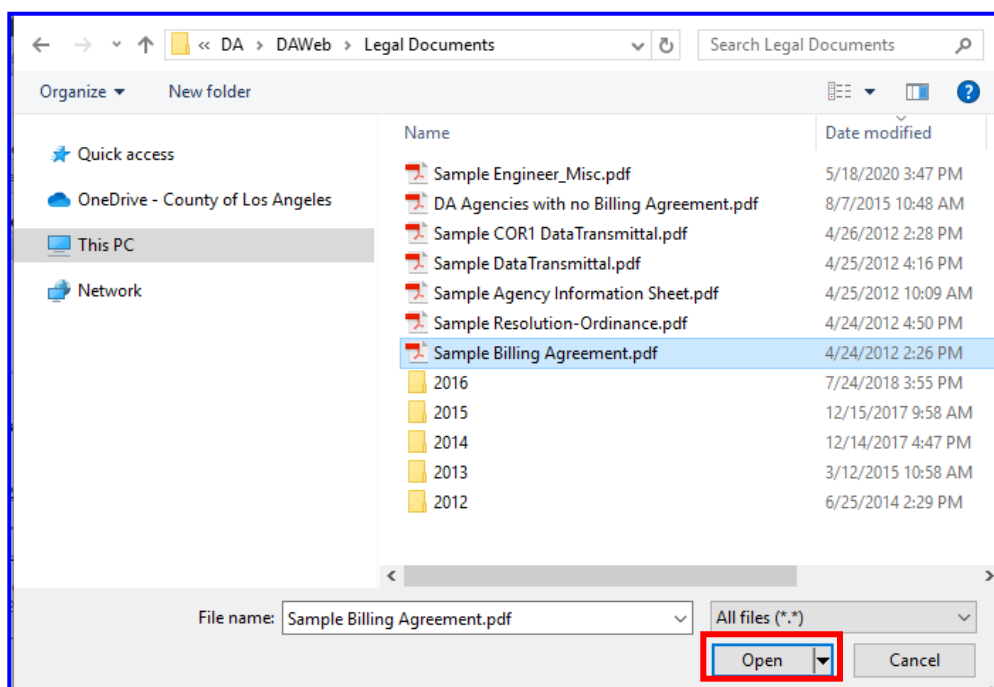
Validate

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


The screenshot shows a web application interface for uploading documents. At the top is a navigation bar with links: 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document' (highlighted), and 'Create AIS Form'. Below the navigation bar is the title 'Upload Document'. The form consists of five steps:

- 1. Select document type:** A dropdown menu with 'Billing Agreement' selected.
- 2. Select agency number to upload:** A row of buttons with agency numbers: 444.44, 555.55, 666.66, 777.77, 888.88, and a button '> 999.90'. Below these are more buttons: '> 999.95', '> 999.97', '> 999.98', and '> 999.99'.
- 3. Validate selected agency number:** A 'Validate' button.
- 4. Select Document to upload: PDF Format Only**: A text box containing '[no files selected]' and a 'Browse' button highlighted with a red box.
- 5. Press upload:** 'Upload' and 'Reset' buttons. A note below says: '(Note: Press on Reset to choose a new agency number and file type)'.

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.



DAWeb

Auditor-Controller v 2.3.3.4

Options | Log Out | Help

Welcome, Agency User

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

Upload Document

1. Select document type:

Billing Agreement

↓

2. Select agency number to upload:

444.44

555.55

666.66

777.77

888.88

> 999.90

> 999.95

> 999.97

> 999.98

> 999.99

3. Validate selected agency number

Validate

4. Select Document to upload: PDF Format Only

×

Sample Billing Agreement.pdf

Browse


523.16kB

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

Upload

Reset

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**.



DAWeb

Auditor-Controller v 2.3.3.4

Options | Log Out | Help

Welcome, Agency User

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

Upload Document

1. Select document type:

2. Select agency number to upload:

444.44

555.55

666.66

777.77

888.88

999.90

999.95

999.97

999.98

999.99

3. Validate selected agency number

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

[no files selected]

5. Press upload:

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

Successfully uploaded file:
Sample Billing Agreement.pdf

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

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

The screenshot displays the DAWeb Auditor-Controller interface. At the top, there is a green header bar with the County of Los Angeles seal, the 'DAWeb' logo, the title 'Auditor-Controller', the version 'v 2.3.3.4', and links for 'Options | Log Out | Help'. Below the header is a navigation bar with links: 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management', 'Upload Document', and 'Create AIS Form'. The main content area is titled 'Upload Document' and contains five steps:

- 1. Select document type:** A dropdown menu is set to 'Resolution/Ordinance'.
- 2. Select agency number to upload:** A grid of agency numbers is shown. The numbers 444.44, 555.55, 666.66, 777.77, 888.88, and 999.90 are visible. The number 999.90 is highlighted with a blue background.
- 3. Validate selected agency number:** A 'Validate' button is present.
- 4. Select Document to upload: PDF Format Only** A file selection interface shows '[one file selected]' with a 'Browse' button. Below this, the file name 'Sample Resolution-Ordinance.pdf' and its size '212.93kB' are displayed.
- 5. Press upload:** A note states '(Note: Press on Reset to choose a new agency number and file type)'. There are 'Upload' and 'Reset' buttons.

A red-bordered box at the bottom of the form contains the text: 'Successfully uploaded file: Sample Resolution-Ordinance.pdf'.

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



DAWeb

Auditor-Controller v 2.3.3.4

Options | Log Out | Help

Welcome, Agency User

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

Upload Document

1. Select document type:

Agency Information Sheet

2. Select agency number to upload:

444.44	555.55	666.66	777.77	888.88	999.90
999.95	999.97	999.98	> 999.99		

3. Validate selected agency number

Validate

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

Sample Agency Information Sheet.pdf Browse

173.67kB

5. Press upload:

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

Upload Reset

Successfully uploaded file:
Sample Agency Information Sheet.pdf

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

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



DAWeb

Auditor-Controller v 2.3.3.4

Options | Log Out | Help

Welcome, Agency User

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

Upload Document

NOTE: Please do not upload document(s) for account(s) that are not submitting.

1. Select document type:

Data Transmittal

↓

2. Select agency number and file type to upload:

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

3. Validate selected agency number and file type

Validate

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

[no files selected]

Browse

5. Press upload:


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

Upload

Reset

Successfully uploaded file:
Sample DataTransmittal.pdf

- 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.



DAWeb

Auditor-Controller v 2.3.3.4

Options | Log Out | Help

Welcome, Agency User

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

Upload Document

1. Select document type:

Engineer's / Misc. Report [Supporting doc] ↓

2. Select agency number to upload:

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

3. Validate selected agency number

Validate

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

✖ Sample Engineers-Misc report.pdf Browse

212.93kB

5. Press upload:

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

Upload Reset

Successfully uploaded file:
Sample Engineers-Misc report.pdf

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

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

Upload Document

1. Select document type:

Engineer's / Misc. Report [Supporting doc] ↓

2. Select agency number to upload:

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

3. Validate selected agency number

Validate

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

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

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

 **DAWeb** Auditor-Controller v 2.4.0.0

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

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

Open Search Panel Submit Refresh

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

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

Records per page: 100

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

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

The screenshot shows the DAWeb Auditor-Controller interface. A confirmation dialog box is open, asking: "Are you sure you want to submit the following file(s)? 999.99 DA". The dialog has "Ok" and "Cancel" buttons. In the background, the "Inbox" section shows a table with two rows of data. The first row is for a DA file with 6,104 transactions and a total DA AMT of \$2,339,388.29. The second row is for a PU file with 1,385 transactions and a total DA AMT of \$1,809,275.89. Both files are marked as "Valid" and "yes". The status icons for both files are "WORK IN PROGRESS".

Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status
2023	999.99	DA	6,104	\$2,339,388.29	yes	WORK IN PROGRESS
2023	999.99	PU	1,385	\$1,809,275.89	yes	WORK IN PROGRESS

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

The screenshot shows the DAWeb Auditor-Controller interface after submission. A yellow message box at the top left says "File(s) submitted". The "Inbox" section shows the same table as before, but the status icons have changed to "PENDING REVIEW". The "Action" column links are now disabled. The table shows two rows of data: a DA file with 6,104 transactions and a total DA AMT of \$2,339,388.29, and a PU file with 1,385 transactions and a total DA AMT of \$1,809,275.89. Both files are marked as "Valid" and "yes". The status icons for both files are "PENDING REVIEW".

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	PENDING REVIEW	02/17/2023	02/17/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
2023	999.99	PU	1,385	\$1,809,275.89	yes	PENDING REVIEW	02/17/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete

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

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

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


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

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



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

	Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
<input type="checkbox"/>	023	999.99	DA	6,104	\$2,339,388.29	yes		02/17/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete


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

	Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
<input type="checkbox"/>	023	999.99	DA	6,104	\$2,339,388.29	yes		02/17/2023	03/28/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete


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

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


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

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


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

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

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

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

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



DAWeb

Auditor-Controller v 2.4.0.0

[Inbox](#)
[Exempt Parcels](#)
[Upload File](#)
[Document Management](#)
[Upload Document](#)
[Create AIS Form](#)
[Report](#)
[FTP](#)
[Administration](#)
[E-Mail](#)

Inbox

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

Records: 1 - 2 of 2 - Pages: 1

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

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

UPLOAD CORRECTION FILE AND CORRECTION DATA TRANSMITTAL

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

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

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

Inbox

Exempt Parcels

Upload File

Document Management

Upload Document

Create AIS Form

Inbox

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

Open Search Panel

Submit

Refresh

Records: 1 - 3 of 3 - Pages: 1

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

Records per page: 100

Records: 1 - 3 of 3 - Pages: 1

8B. Perform the following upload steps:

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

Inbox	Exempt Parcels	Upload File	Document Management	Upload Document	Create AIS Form
Upload File					
1. Select File Type:					
<input type="radio"/> Direct Assessment File					
<input type="radio"/> Public Utility File					
<input type="radio"/> Correction Direct Assessment File					
<input type="radio"/> Correction Public Utility File					
<input type="radio"/> Exempt Parcels File					
2. Enter agency number to upload:					
<input type="text" value="999.99"/>					
Must be 5 digits and in 2 decimal format (xxx.xx)					
3. Validate agency number:					
<input type="button" value="Validate"/>					

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

Options | Log Out | Help

v 2.3.3.4 Welcome, Agency User

Create AIS Form

File name: COR_99999.xlsx All Files (*.*)

Open Cancel

[no files selected] Browse

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

Upload Reset

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

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

Upload File

1. Select File Type:

☐ Direct Assessment File

☐ Public Utility File

☒ Correction Direct Assessment File

☐ Correction Public Utility File

☐ Exempt Parcels File

2. Enter agency number to upload:

999.99

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

3. Validate agency number:

Validate

4. Select File to upload:

COR_99999.xlsx 7.86kB

Browse

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

Upload Reset

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

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

DAWeb Auditor-Controller v 2.4.0.0

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

Upload File

1. Select File Type:

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

2. Enter agency number to upload:

999.99

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

3. Validate agency number:

Validate

Successfully uploaded files:
COR_99999.xlsx

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

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

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form											
Inbox NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file											
Open Search Panel Submit Refresh											
Records: 1 - 4 of 4 - Pages: 1											
Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
<input type="checkbox"/> 2023	999.99	DA COR v1	2	\$110.00	yes	WORK IN PROGRESS	03/06/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/> 2023	999.99	DA COR v2	2	\$10.00	no	WORK IN PROGRESS	03/06/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check In Delete
<input type="checkbox"/> 2023	999.99	DA	6,104	\$2,339,388.29	yes	PENDING REVIEW	02/17/2023	02/17/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/> 2023	999.99	PU	1,385	\$1,809,275.89	yes	WORK IN PROGRESS	02/17/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
Records per page: 100											
Records: 1 - 4 of 4 - Pages: 1											

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

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form											
Inbox NOTE: The checkbox to submit the file will be disabled until all four (4) legal documents are uploaded along with a valid data file											
Open Search Panel Submit Refresh											
Records: 1 - 4 of 4 - Pages: 1											
Fiscal Year	Agency #	File Type	TXN Count	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
<input type="checkbox"/> 2023	999.99	DA COR v1	2	\$110.00	yes	WORK IN PROGRESS	03/06/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/> 2023	999.99	DA COR v2	2	\$10.00	no	WORK IN PROGRESS	03/06/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check In Delete
<input type="checkbox"/> 2023	999.99	DA	6,104	\$2,339,388.29	yes	PENDING REVIEW	02/17/2023	02/17/2023	4	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
<input type="checkbox"/> 2023	999.99	PU	1,385	\$1,809,275.89	yes	WORK IN PROGRESS	02/17/2023		3	PCL CHG RPT Data Transmittal History/Detail Report Exception Report	Edit Check Out Delete
Records per page: 100											
Records: 1 - 4 of 4 - Pages: 1											

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

Main Report

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

TOTAL OLD PARCEL CNT: 0
 TOTAL NEW PARCEL CNT: 0
 FILE TYPE: Direct Assessment Correction File version 1
 FILE NAME: COR_99999.xlsx

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

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

<ul style="list-style-type: none"> 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)
<ul style="list-style-type: none"> Add new parcels and delete old parcels in Edit mode 	Go to Correct the Data File in Edit Mode (P. 66)
<ul style="list-style-type: none"> 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 **Data Transmittal** link under **Report** to verify the Total Parcel Count and DA Amount.

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

Open Search Panel Submit Refresh

Records: 1 - 4 of 4 - Pages: 1

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

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

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

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

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

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.

Inbox

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

Open Search Panel				Submit		Refresh		Export to Excel		Records: 1 - 2 of 2 - Pages: 1		
	Fiscal Yea	Agency #	File Type	TXN Coun	Total DA AMT	Valid	Status	Upload Date	Submit Date	Docs	Report	Action
<input type="checkbox"/>	2024	001.70	DA	2,214,065	\$335,952,474.55	yes		08/08/2024		4	PCL CHG RPT Data Transmittal History/Detail Re Exception Report	Edit Check Ou Delete
<input type="checkbox"/>	2024	001.70	PU	25	\$471,690.00	yes		08/08/2024		4	PCL CHG RPT Data Transmittal History/Detail Re Exception Report	Edit Check Ou Delete
Records per page: 100												
Records: 1 - 2 of 2 - Pages: 1												

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.

auditor.lacounty.gov/direct-assessments/

MYLacounty - Los A... Direct Assessments... ePortal-2c - Enterpr... QA DAWEB Auditor-Controller j... ACDC AMP ATE2 Test Site AMP Prod Site AMP STG2 Test Site AMP ATE3

lacounty.gov

Auditor-Controller
Los Angeles County

LA County Fraud Hotline
1-800-544-6861

ABOUT THE AUDITOR PROPERTY TAX REPORTS CAREERS UNCLAIMED CHECKS LINKS OF INTEREST ALERTS

Direct Assessments

Contact List DA Manual and Forms **Exception Report** DA Payment - Secured Master DA Payment - Secured Defaulted

Enter Your Agency Number:

SUBMIT

Agency Number should NOT contain decimal and should include leading zeroes, i.e. acct 36.92 = 03692.

NOTE: Exception reports will be available every Monday and Thursday after 11:00AM during the current year DA Roll Build-Up season.



Upload Document

1. Select document type:

[Select One]

[Select One]

Billing Agreement

Resolution/Ordinance

Agency Information Sheet

Data Transmittal

Engineer's / Misc. Report [Supporting doc]

80. 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.

Upload Document

1. Select document type:

Data Transmittal



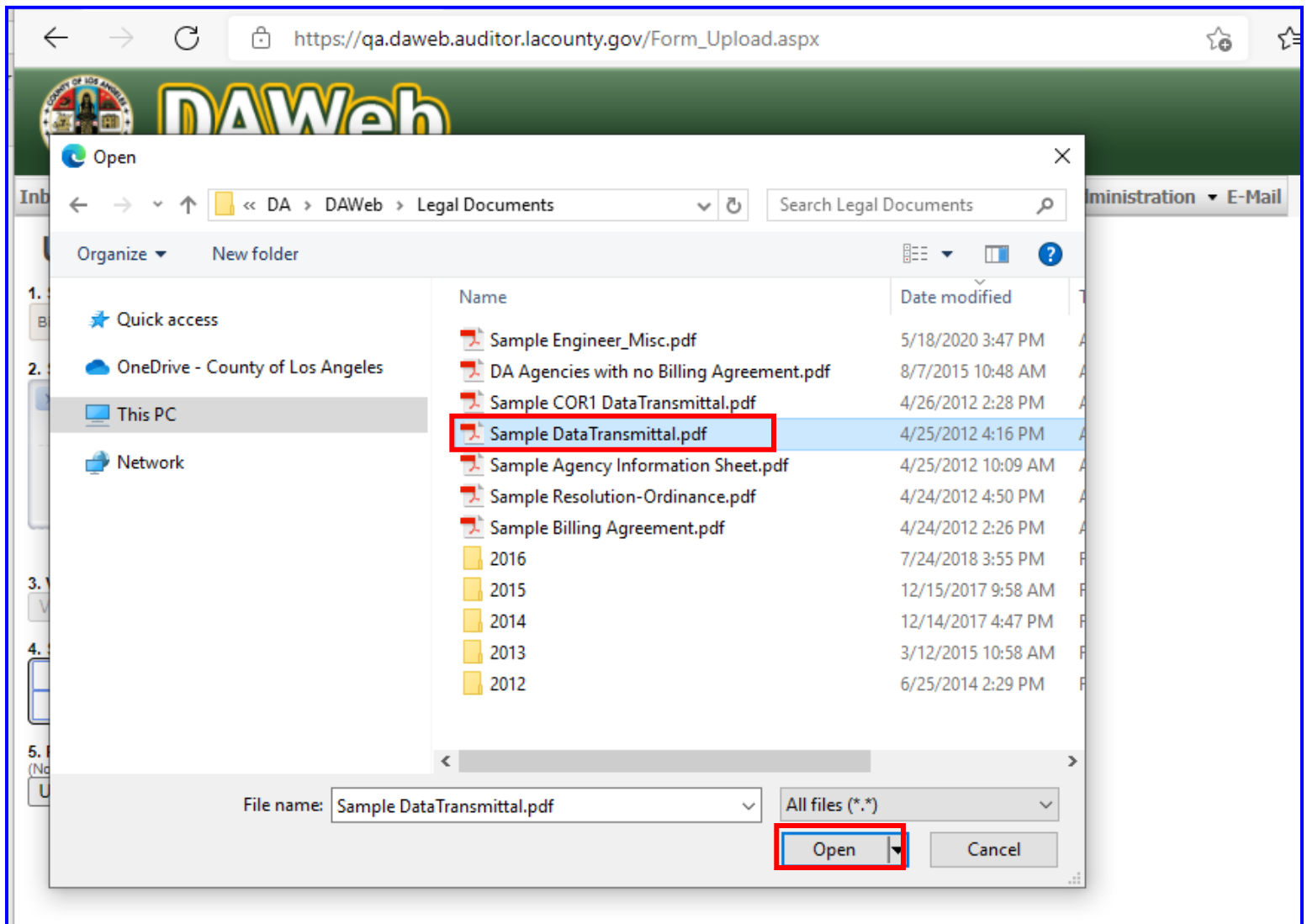
2. Select agency number and file type to upload:

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

3. Validate selected agency number and file type

Validate

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.**



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

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

Upload Document

1. Select document type:

Data Transmittal

↓

2. Select agency number and file type to upload:

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

3. Validate selected agency number and file type

Validate

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

×

Sample DataTransmittal.pdf

Browse

37.68kB

5. Press upload:

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

Upload

Reset

- 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.

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

Upload Document

1. Select document type:

Data Transmittal

2. Select agency number and file type to upload:

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

3. Validate selected agency number and file type

Validate

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

[no files selected] Browse

5. Press upload:

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

Upload Reset

Successfully uploaded file:
Sample DataTransmittal.pdf

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.

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

Inbox

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

Open Search Panel **Submit** Refresh

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

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

Records per page: 100

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

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

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

Inbox

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

Open Search Panel Submit Refresh

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

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

Records per page: 100

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

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

Ok Cancel

- 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.

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

- 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.

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

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

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

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

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

Document Detail

Back

Fiscal Year 2023

Agency Number 999.99

Bill Description LA County Test

File Type Direct Assessment Correction File version 1

File Name COR_99999.xlsx

Required Legal Documents

Document Type	Status	Comment	Uploaded By	Uploaded Date	Updated By	Updated Date
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.



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

Document Management

[Open Search Panel](#) [Export to Excel](#) [Refresh](#)

Records: 1 - 7 of 7 - Pages: [1](#)

Drag a column header here to group by that column.

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

Records per page:

Records: 1 - 7 of 7 - Pages: [1](#)

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

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form							
Document Management							
Open Search Panel Export to Excel Refresh							
Records: 1 - 7 of 7 - Pages: << < 1 > >>							
Drag a column header here to group by that column.							
Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
2023	999.99	LA County Test	Billing Agreement	Approved		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 Engineer/Misc 1 R v1	Denied	Missing Bill Description	View History	Delete
2023	999.99	LA County Test	Data Transmittal - DA COR v2	Pending for Review		View History	Delete
2023	999.99	LA County Test	Engineer/Misc 1	Pending for Review		View History	Delete
Records per page: 100 Records: 1 - 7 of 7 - Pages: << < 1 > >>							

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

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form							
Document Management							
Open Search Panel Export to Excel Refresh							
Records: 1 - 7 of 7 - Pages: << < 1 > >>							
Drag a column header here to group by that column.							
Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
2023	999.99	LA County Test	Billing Agreement	Approved		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 Engineer/Misc 1 R v1	Denied	Missing Bill Description	View History	Delete
2023	999.99	LA County Test	Data Transmittal - DA COR v2	Pending for Review		View History	Delete
2023	999.99	LA County Test	Engineer/Misc 1	Pending for Review		View History	Delete
Records per page: 100 Records: 1 - 7 of 7 - Pages: << < 1 > >>							

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

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

Document History

[Back](#)

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

Document History

Version	History/Status	Comment	Updated By	Updated Date
1	Document has been denied	Missing Bill Description	User, Auditor	03/28/2023
1	Document is pending for review		User, Test	03/28/2023

Records: 1 - 2 of 2

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

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

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

Document Management

[Open Search Panel](#) [Export to Excel](#) [Refresh](#)

Records: 1 - 7 of 7 - Pages: [1](#)

Drag a column header here to group by that column.

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

Records per page: 100

Records: 1 - 7 of 7 - Pages: [1](#)

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

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

Document Management

[Open Search Panel](#) [Export to Excel](#) [Refresh](#)

Records: 1 - 7 of 7 - Pages: [1](#)

Drag a column header here to group by that column.

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

Records per page: [100](#)

Records: 1 - 7 of 7 - Pages: [1](#)

Are you sure you want to delete the following document?
Agency #: 999.99
Document: Data Transmittal DA COR v1

[Ok](#) [Cancel](#)

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

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

Document Management

[Open Search Panel](#) [Export to Excel](#) [Refresh](#)

Records: 1 - 7 of 7 - Pages: [1](#)

Drag a column header here to group by that column.


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

Records per page: [100](#)

Records: 1 - 7 of 7 - Pages: [1](#)

- 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.



DAWeb

Auditor Controller v 2.2.3.2

Options | Log Out | Help

Welcome, Agency User

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

Document Management

[Open Search Panel](#) [Export to Excel](#) [Refresh](#)

Records: 1 - 15 of 15 - Pages: 1

Fiscal Year	Agency #	Bill Description	Document	Status	Comment	Report	Action
[-] Agency #: 666.66							
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
[-] Agency #: 888.88							
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
[-] Agency #: 999.98							
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
[-] Agency #: 999.99							
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

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

Inbox

Exempt Parcels

Upload File

Document Management

Upload Document

Create AIS Form

Document Management

Open Search Panel

Export to Excel

Refresh


Records: 1 - 15 of 15 - Pages: 1

Document

Status

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

- 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.



DAWeb

Auditor Controller v 2.2.3.2

Options | Log Out | Help

Welcome, Agency User

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

Document Management

[Open Search Panel](#) [Export to Excel](#) [Refresh](#)

Records: 1 - 15 of 15 - Pages: [1](#)

Drag a column header here to group by that column.

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

Records per page:

Records: 1 - 15 of 15 - Pages: [1](#)

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

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

Document Management

Open Search Panel Export to Excel Refresh

Search Panel
Fiscal Year: 2018
Agency Number: 999.9*
Document Type: All
Status: All
Search Reset Close Search Panel

Records: 1 - 15 of 15 - Pages: 1

	Status	Comment	Report	Action
nt	Approved		View History	Delete
nance	Approved		View History	Delete
nt	Denied	Missing Account Number	View History	Delete
2013 888.88 account Resolution/Ordinance	Approved		View History	Delete

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

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

Document Management

Open Search Panel Export to Excel Refresh

Records: 1 - 9 of 9 - Pages: 1

Drag a column header here to group by that column.

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

Records per page: 100

Records: 1 - 9 of 9 - Pages: 1

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

The screenshot shows the 'Document Management' interface. At the top, there are navigation tabs: 'Inbox', 'Exempt Parcels', 'Upload File', 'Document Management' (selected), 'Upload Document', and 'Create AIS Form'. Below the tabs, there are buttons for 'Open Search Panel', 'Export to Excel', and 'Refresh'. The 'Search Panel' is open, displaying search criteria: 'Fiscal Year' (2018), 'Agency Number' (999.9*), 'Document Type' (All), and 'Status' (All). The 'Reset' button is highlighted with a red box. The background shows a table with columns: 'Status', 'Comment', 'Report', and 'Action'. The table contains three rows of data, all with a status of 'Pending for Review'. The first row is 'n/Ordinance', the second is 'reement', and the third is 'nformation Sheet'. Each row has 'View', 'History', and 'Delete' links in the 'Action' column.

Status	Comment	Report	Action
Pending for Review	n/Ordinance	View History	Delete
Pending for Review	reement	View History	Delete
Pending for Review	nformation Sheet	View History	Delete

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

The screenshot shows the 'Document Management' interface, similar to the previous one. The 'Search Panel' is open, and the 'Document Type' dropdown menu is expanded, showing the following options: 'All', 'Billing Agreement', 'Resolution/Ordinance', 'Agency Information Sheet', 'Data Transmittal', and 'Engineer/Misc'. The 'Document Type' label is highlighted with a red box. The background table is the same as in the previous screenshot, showing three rows of data with a status of 'Pending for Review'.

Status	Comment	Report	Action
Pending for Review	n/Ordinance	View History	Delete
Pending for Review	reement	View History	Delete
Pending for Review	nformation Sheet	View History	Delete

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

InboxExempt ParcelsUpload FileDocument ManagementUpload DocumentCreate AIS Form

Document Management

Open Search PanelExport to ExcelRefresh

Search Panel

Fiscal Year2018

Agency Number999.9*

Document TypeAll

Status

AllPending for ApprovalApprovedDenied

Search

Records: 1 - 6 of 6 - Pages: 1

				Status	Comment	Report	Action
				Pending for Review		View History	Delete
				Pending for Review		View History	Delete
				Pending for Review		View History	Delete
2018	999.99	Test Agency	Data Transmittal - DA	Pending for Review		View History	Delete
2018	999.99	Test Agency	Data Transmittal - PU	Pending for Review		View History	Delete
2018	999.99	Test Agency	Data Transmittal - DA COR v1	Pending for Review		View History	Delete

Records per page: 100

Records: 1 - 6 of 6 - Pages: 1

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

InboxExempt ParcelsUpload FileDocument ManagementUpload DocumentCreate AIS Form

Document Management

Open Search PanelExport to ExcelRefresh

Records: 1 - 6 of 6 - Pages: 1

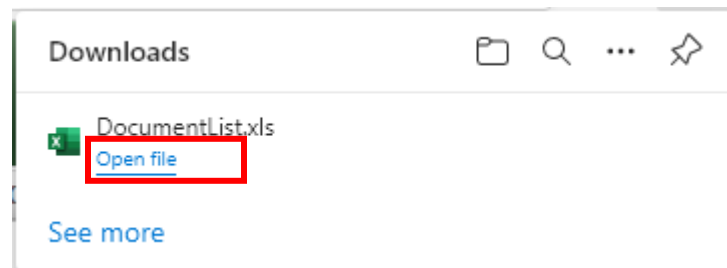
Drag a column header here to group by that column.

Fiscal Year	Agency #	▲ Bill Description	Document	Status	Comment	Report	Action
2018	999.99	Test Agency	Resolution/Ordinance	Pending for Review		View History	Delete
2018	999.99	Test Agency	Billing Agreement	Pending for Review		View History	Delete
2018	999.99	Test Agency	Agency Information Sheet	Pending for Review		View History	Delete
2018	999.99	Test Agency	Data Transmittal - DA	Pending for Review		View History	Delete
2018	999.99	Test Agency	Data Transmittal - PU	Pending for Review		View History	Delete
2018	999.99	Test Agency	Data Transmittal - DA COR v1	Pending for Review		View History	Delete

Records per page: 100

Records: 1 - 6 of 6 - Pages: 1

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




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

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

	A	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.



DAWeb

Auditor Controller

v2.2.3.3

Options | Log Out | Help

Welcome, Agency User

InboxExempt ParcelsUpload FileDocument ManagementUpload DocumentCreate AIS Form

Document Management

Open Search PanelExport to ExcelRefresh

Records: 1 - 15 of 15 - Pages: 1

Drag a column header here to group by that column.

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

Records per page: 100Records: 1 - 15 of 15 - Pages: 1

UPLOAD EXEMPT PARCELS FILE

State Parcel Tax Reporting – Assembly Bill 2109

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

Perform the following steps to upload the Exempt Parcels file:

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

The screenshot shows the DAWeb interface. The navigation bar at the top includes tabs: **Inbox**, **Exempt Parcels**, **Upload File** (highlighted with a red box), **Document Management**, **Upload Document**, and **Create AIS Form**. Below the navigation bar, the main heading is **Exempt Parcels**. There are two buttons: **Open Search Panel** and **Refresh**. Below these buttons is a table with the following columns: **Fiscal Year**, **Agency #**, **TXN Count**, **Total DA AMT**, **Valid**, **Uploaded Date**, **Report**, and **Action**. The table is empty, and the text **There are no records available.** is displayed. At the bottom of the table, there is a **Records per page:** dropdown menu set to **100**. The pagination information at the bottom right of the table reads: **Records: 0 - 0 of 0 - Pages: 1**.

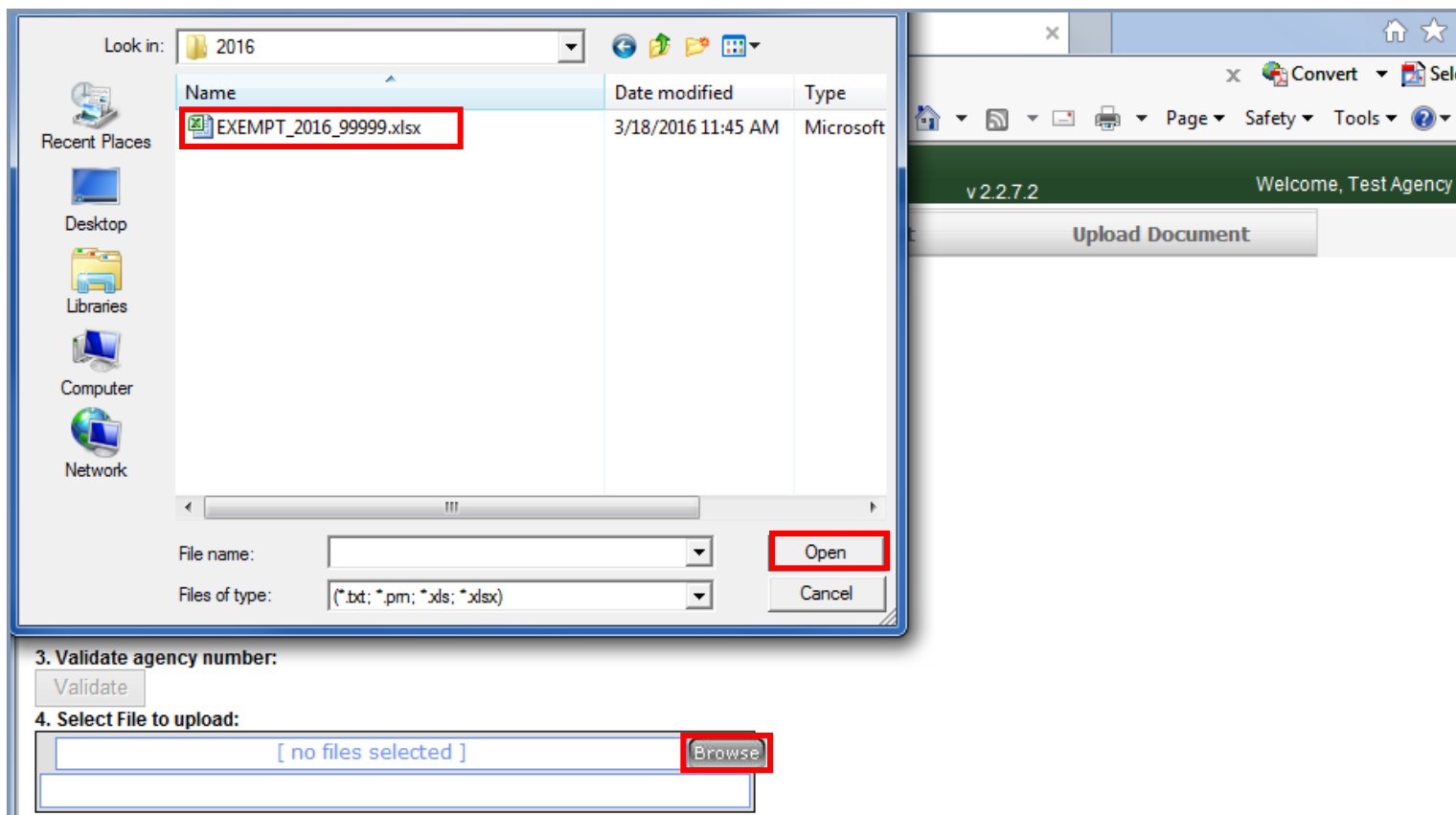
10B. Perform the following upload steps:

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

The screenshot shows the **Upload File** form. It has three steps:

- 1. Select File Type:** There are five radio buttons: **Direct Assessment File**, **Public Utility File**, **Correction Direct Assessment File**, **Correction Public Utility File**, and **Exempt Parcels File** (selected and highlighted with a red box).
- 2. Enter agency number to upload:** There is a text input field containing **999.99** (highlighted with a red box). Below the field is a note: **Must be 5 digits and in 2 decimal format (xxx.xx)**.
- 3. Validate agency number:** There is a **Validate** button (highlighted with a red box).

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



- 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.

Upload File

1. Select File Type:

☐ Direct Assessment File

☐ Public Utility File

☐ Correction Direct Assessment File

☐ Correction Public Utility File

☒ Exempt Parcels File

2. Enter agency number to upload:

999.99

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

3. Validate agency number:

Validate

4. Select File to upload:

EXEMPT_2016_99999.xlsx 114.21kB

5. Press upload:

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

Upload Reset

Move the cursor over the white area to display the file name

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

Upload File

1. Select File Type:

☐ Direct Assessment File

☐ Public Utility File

☐ Correction Direct Assessment File

☐ Correction Public Utility File

☒ Exempt Parcels File

2. Enter agency number to upload:

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

3. Validate agency number:

Successfully uploaded files:
EXEMPT_2016_99999.xlsx

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

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

Upload File

1. Select File Type:

☐ Direct Assessment File

☐ Public Utility File

☐ Correction Direct Assessment File

☐ Correction Public Utility File

☒ Exempt Parcels File

2. Enter agency number to upload:

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

3. Validate agency number:

Successfully uploaded files:
EXEMPT_2016_99999.xlsx

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

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form							
Exempt Parcels							
Open Search Panel		Refresh		Records: 1 - 1 of 1 - Page 1			
1 Fiscal Year	2 Agency #	3 TXN Count	4 Total DA AMT	5 Valid	6 Uploaded Date	7 Report	8 Action
2016	999.99	5,590	\$0.00	yes	04/20/2016	PCL CHG RPT Data Transmittal History/Detail Report	Edit Delete
Records per page: 100		Records: 1 - 1 of 1 - Pages: 1					

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 **PCL CHG RPT** link under the Report column to retrieve the Parcel Change Report. The report can be exported to PDF or Excel.

Inbox Exempt Parcels Upload File Document Management Upload Document Create AIS Form							
Exempt Parcels							
Open Search Panel		Refresh		Records: 1 - 1 of 1 - Pages: 1			
Fiscal Year	Agency #	TXN Count	Total DA AMT	Valid	Uploaded Date	Report	Action
2016	999.99	5,590	\$0.00	yes	04/20/2016	PCL CHG RPT Data Transmittal History/Detail Report	Edit Delete
Records per page: 100		Records: 1 - 1 of 1 - Pages: 1					

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

Find... 1 of 1 100%



Main Report




2016	PARCEL CHANGE FILE	PARCEL CHANGE REPORT	RUN DATE	05/04/2016
TOTAL OLD PARCEL CNT:	0	AGENCY NUMBER 999.99	UPLOAD DATE	04/20/2016
TOTAL NEW PARCEL CNT:	0			
FILE TYPE: Exempt Parcels File				
FILE NAME: EXEMPT_2016_99999.xlsx				

<u>ID</u>	<u>PCL</u>	<u>FORMAT</u>	<u>STATUS</u>	<u>AGENCY NUMBER</u>	<u>DA</u>	<u>AMOUNT</u>
-----------	------------	---------------	---------------	----------------------	-----------	---------------

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

<ul style="list-style-type: none"> 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)
<ul style="list-style-type: none"> Add new parcels and delete old parcels in Edit mode 	Go to ‘Correct the Data File in Edit Mode’ (P. 66)




1 of 1
100%

Main Report



2016 PARCEL CHANGE FILE PARCEL CHANGE REPORT RUN DATE 05/04/2016
 AGENCY NUMBER 999.99 UPLOAD DATE 04/20/2016

TOTAL OLD PARCEL CNT: 13
 TOTAL NEW PARCEL CNT: 11

FILE TYPE: Exempt Parcels File
 FILE NAME: EXEMPT_2016_99999.xlsx

ID	PCL	FORMAT	STATUS	AGENCY NUMBER	DA	AMOUNT
212021412005002	5808019016	M1	O	999.99		0
212021412005002	5808019020	M1	N			0
212050119001001	5811003008	M1	O	999.99		0
212050119001001	5811003009	M1	O	999.99		0
212050119001001	5811003014	M1	N			0

Done

 Trusted sites
  100%

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

Exempt Parcels

Open Search Panel

Refresh

Records: 1 - 1 of 1 - Pages: 1							
Fiscal Year	Agency #	TXN Count	Total DA AMT	Valid	Uploaded Date	Report	Action
2016	999.99	5,590	\$0.00	yes	04/20/2016	<div> <div>PCL CHG RPT</div> <div>Data Transmittal</div> <div>History/Detail Report</div> </div>	<div>Edit</div> <div>Delete</div>

Records per page: 100

Records: 1 - 1 of 1 - Pages: 1

- 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.

[Inbox](#)

[Exempt Parcels](#)

[Upload File](#)

[Document Management](#)

[Upload Document](#)

[Create AIS Form](#)

Exempt Parcels

Open Search Panel

Refresh

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

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

Records per page: 100 >

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