

## Hello Special Assessment Administrators and Editors,

The 2021 special assessment application is now available for editing on AccessDane for your municipality. I've identified all users with either the specials administrator or editor role in the distribution of this message, but if there are new people in your municipality that will be performing this work, please feel free to forward this message to them.

As in past years, please try and have your specials loaded by **Thanksgiving (11/25/21)**.

Also, I wanted to remind you of the resources we have to assist you with the process of entering your special assessments. First of all, there is a PDF attached that can help step you through the process. Along with that, we do still have the tutorials available on YouTube. Here are the links:

For information on **Managing Special Assessment**, assigning roles (specials editor/admin), loading data, editing parcels and amounts, saving and submitting to Dane County, use this link:

<https://youtu.be/ZlkuuGJSywM>

For information on working with the **CSV file exchange format** for batch loading values, use this link:

[https://youtu.be/VoMtQcWBK\\_Y](https://youtu.be/VoMtQcWBK_Y)

If you need additional help, either Peggy or myself will be more than happy to assist. We'll also both be at the local treasurer's training tomorrow to address any specific questions you may have.

\*\*\*\*REMINDER\*\*\*\*

All **Specials Administrators**, when you finish your specials, remember to submit them to the County. We won't receive them until they have been submitted.

Also, we do have some resources available for comparing districts. Here is a link to a version of our online mapping to display districts:

<https://dcimapapps.countyofdane.com/districts/>

Thank you,

Troy Everson  
*Land Records Administrator*  
**Dane County**  
**Department of Planning and**  
**Development 608-261-9750**  
[everson@countyofdane.com](mailto:everson@countyofdane.com)

# ACCESSDANE

## *Managing Municipal Special Assessments and Charges*

Beginning in 2017, the process used to manage special assessments and charges migrated to an efficient data model leveraging custom tools built in AccessDane. The overwhelming positive response to the pilot project in 2017 has encouraged Dane County to formalize the process for all municipalities in 2018.



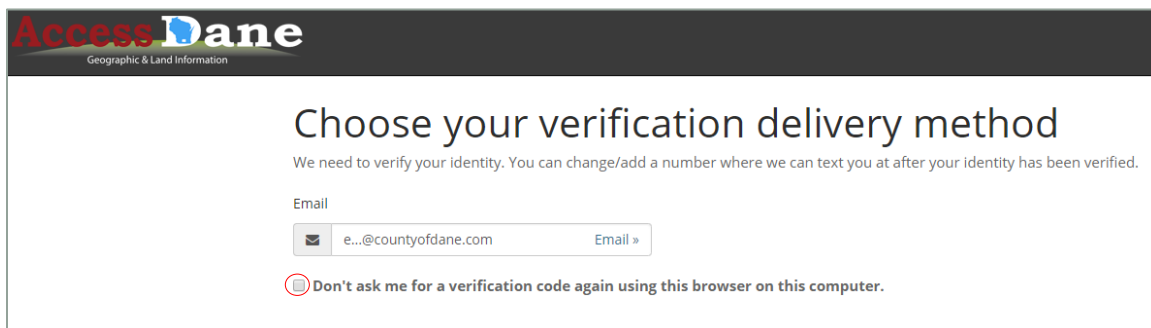
# ACCESSDANE

## *Managing Municipal Special Assessments and Charges*

Managing special assessments and charges is the first venture into sharing sensitive tax related information via AccessDane. Accordingly, additional security steps have been put into place, the largest of which is the use of two-factor authentication. The screen shots below demonstrate what a user can expect when it comes to verifying identity:

### TWO-FACTOR AUTHENTICATION

- When attempting to log-in, for security purposes, a users identity must be verified. The initial message will request a delivery method for receipt of a verification code:



**AccessDane**  
Geographic & Land Information

### Choose your verification delivery method

We need to verify your identity. You can change/add a number where we can text you at after your identity has been verified.

Email

[Email »](#)

☒ Don't ask me for a verification code again using this browser on this computer.

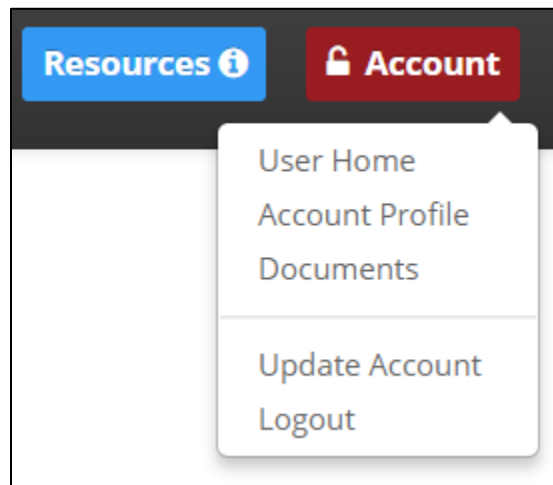
*Note* - By selecting the check-box circled above, a user can have their identity remember for that browser on that computer for 90 days.

- When the e-mail method is selected, a user will find a message in their inbox that will look like this:

From:	donotreply@countyofdane.com
To:	Everson, Troy
Cc:	
Subject:	Dane County Verification Code

**Your Dane County Verification Code is 102154.**

- Users may also wish to change the method to receive a verification code. If a phone number is entered, a text message can also be used. Here is how that option is possible:



**SELECT Update Account** from the **Account** button when logged in.

An area for Two Factor Authentication cell number is located at the bottom:

Two Factor Authentication

Cell Number

Update Account

The next time, there will be two options to choose from:

## Choose your verification delivery method

We need to verify your identity. You can change/add a number where we can text you at after your identity has been verified.

Email

Email »

Text

Text »

☐ Don't ask me for a verification code again using this browser on this computer.

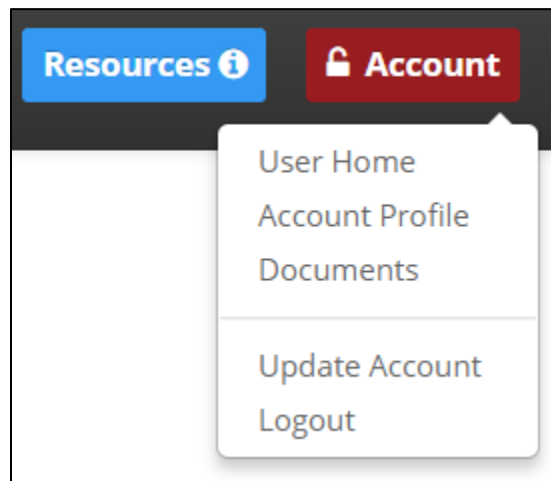
## SPECIALS ADMINISTRATORS AND EDITORS

Another enhancement related to security and the theme of AccessDane is that there is role-based functionality that can be designated. When it comes to managing specials, there are two roles that can be assigned to any staff within your municipality. The two roles are SPECIALS ADMINISTRATOR and SPECIALS EDITOR. The specials *administrator* is essentially the gatekeeper prior to submitting special assessments and charges back to the county. The administrator can designate anyone in the organization as an *editor*. There can be only one administrator, but multiple different editors (only one per code, however). Editors work on individual codes, save them and submit.

The AccessDane account **administrator** must assign a SPECIALS ADMINISTRATOR to begin. Here is more on how to assign these important roles for managing specials:

### ASSIGNING ROLES

- *SELECT Account Profile* from the **Account** button:



- A grid of authorized users will appear. From this page, the ADMINISTOR can GRANT or REVOKE different roles.

Troy M Everson ( <b>Administrator</b> )	<ul style="list-style-type: none"> <li>• Surveyor</li> <li>• AccessDane_Specials_Admin</li> <li>• AccessDane_Specials_Editor</li> </ul>	<div>Grant Address Update</div> <div>Grant Notifications</div> <div>Revoke Specials Admin</div> <div>Revoke Specials Editor</div>
Erica Schmitz	<ul style="list-style-type: none"> <li>• Public Agency View</li> <li>• Public Agency Addr</li> </ul>	<div>Remove User</div> <div>Revoke Address Update</div> <div>Grant Notifications</div> <div>Grant Specials Admin</div> <div>Grant Specials Editor</div>

- When the roles have been assigned, the AccessDane user homepage will have an area for Special Assessment management:

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## Specials

**Edit Specials**

Edit Specials for your organization.

**Admin Specials**

Manage Specials for your organization.

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- When the Admin Specials link is selected, the following page is accessed:

Administer Specials Codes for 2018 tax year  
[Go To Edit Specials](#)

Administer codes assigned to TOWN OF DUNN ▼

- The heading for Administer codes assigned will accordion down to display all the special codes that were active from the previous year:

Administer Specials Codes for 2018 tax year  
[Go To Edit Specials](#)

Administer codes assigned to TOWN OF DUNN ^

C02 - SD #1  
TOWN OF DUNN

**Assigned User:** DaneCountySurveyor  
**Save Date:** 3/6/2018 9:46 AM  
**Saved By:** DaneCountySurveyor

[Remove User](#)  
[Inactivate Code](#)  
[Unlock](#) [View](#)  
[CSV](#) [Report](#)

C05 - SD #3  
TOWN OF DUNN

**Assigned User:** DaneCountySurveyor  
**Save Date:** 3/8/2018 2:12 PM  
**Saved By:** DaneCountySurveyor

[Remove User](#)  
[Inactivate Code](#)  
[Unlock](#) [View](#)  
[CSV](#) [Report](#)

C07 - SD #4  
TOWN OF DUNN

**Assigned User:** DaneCountySurveyor  
**Save Date:** Not saved yet.  
**Saved By:**

[Remove User](#)  
[Inactivate Code](#)  
[Unlock](#) [View](#)  
[CSV](#) [Report](#)

*Note* – Codes that are no longer needed can be **inactivated**; if new codes are needed, there will be a **request new code** button near the bottom of the page.

### Request New TOWN OF DUNN Code

Ask for a new code to be added to TOWN OF DUNN.

+ Add Code

- To assign an **EDITOR** for a special code, select **Assign User**:

**C08 - DELINQUENT TRASH**  
TOWN OF DUNN

**Assigned User:** No one assigned.  
**Save Date:** Not saved yet.  
**Saved By:**

**Assign User** (highlighted with a red box)

Inactivate Code

Unlock View

CSV Report

- Any user that has been granted the **EDITOR** will be available in the following dropdown:

Assign user to code

Select an editor

Cancel OK

- Once an **EDITOR** has been assigned to a code, that code becomes available when the **EDITOR** navigates to the **EDIT SPECIALS** link. Only one editor can be assigned per code. It will look like this:

**C02 - 5D #1**  
TOWN OF DUNN

**Save Date:** 3/6/2018 9:46 AM  
**Saved By:** DaneCountySurveyor

**Edit** (highlighted with a red box) View

CSV Report

- As an EDITOR, to begin editing a code, *select* **Edit** from the window above. The following specials editing screen will appear:

Note – From this screen, you can add parcels, edit values, and remove parcels. You are also able to save your work and finish which will then tell the SPECIALS ADMINISTRATOR that the code has been completed for the year.

- From this screen, the headings on the left can expand to reveal the editing tools. When fully expanded, here are the options:

#### ADD PARCELS

There are three different methods to add parcels. There is a Batch Upload, Add Parcel to bring in individual parcels, or you can bring values forward from the previous year (as seen above).

#### EDIT PARCELS/VALUES

This section of tools will work off of the parcels listed that have been added to the code. They work based on whether the records are selected or not.

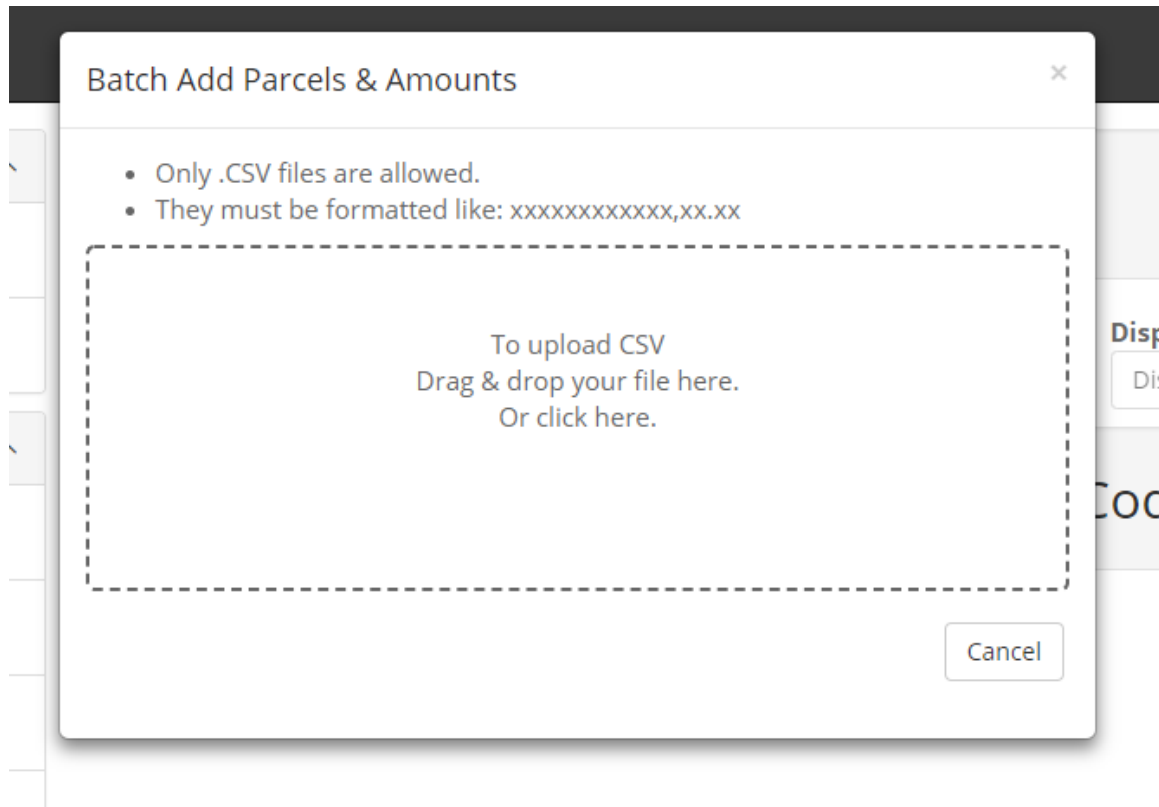
#### SAVE/FINISH

Saving your work allows progress to be saved in session. You can exit AccessDane and the work will be saved. Finish Code will lock the code and alert the administrator that the code has been completed for the year. The code, however, has still not been submitted to the county yet, only giving notice to the Specials Admin, who can submit when all codes have been finished.



## BATCH UPLOAD

- Selecting the **Batch Upload** will result in a screen that appears like this:



*Note* – the file to be uploaded needs to be a CSV or comma separated text file. The format needs to be the 12 digit parcel number-comma-value *EX:* 051201999999,100.00

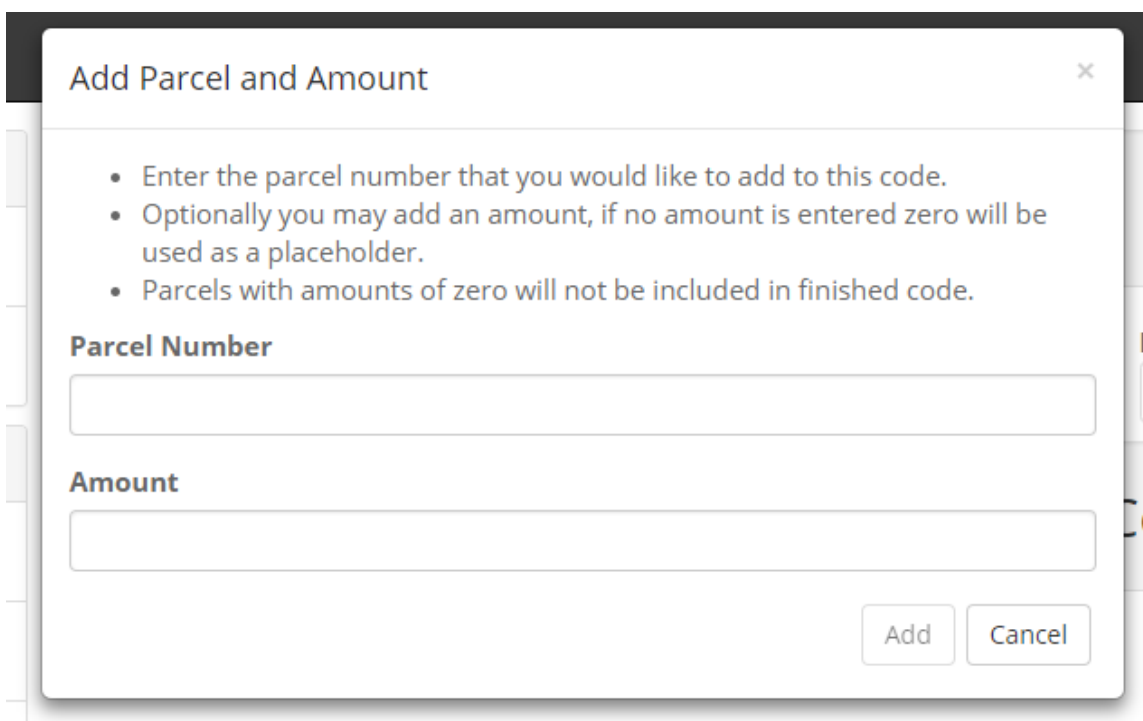
- If there is an error with either the Batch Load or the bringing parcels forward from a previous year, it will look like this:



*Note* – Typically, this error will result when parcels have been retired for given year and aren't assessable for the current tax year. Please use AccessDane to track the history to identify the appropriate tax parcel for your special code or use your split roll in the documents section of AccessDane.

**ADD PARCEL**

- To add a single parcel to the code, *SELECT Add Parcel*



The image shows a screenshot of a software interface with a modal dialog box titled "Add Parcel and Amount". The dialog box has a close button (X) in the top right corner. Inside the dialog, there are three bullet points: "Enter the parcel number that you would like to add to this code.", "Optionally you may add an amount, if no amount is entered zero will be used as a placeholder.", and "Parcels with amounts of zero will not be included in finished code." Below the instructions, there are two input fields: "Parcel Number" and "Amount". At the bottom right of the dialog, there are two buttons: "Add" and "Cancel".

**Add Parcel and Amount** ×

- Enter the parcel number that you would like to add to this code.
- Optionally you may add an amount, if no amount is entered zero will be used as a placeholder.
- Parcels with amounts of zero will not be included in finished code.

**Parcel Number**

**Amount**

**Add** **Cancel**

*Note* – Add your parcel number and the amount, *select Add*

## EDIT PARCELS/VALUES

**Specials Editing**  
**Selected Code:** D03 - SD #2  
**Municipality:** TOWN OF DUNN

**Select Rows**

**Sort By**

**Display Additional Info**

Number Of Parcels: 38  
 Total Amount: \$11,989.01

Number Of Selected Parcels: 0  
 Total Of Selected Parcels: \$0.00

+	Parcel: 028/0610-133-8690-7	<a href="#">Map</a>	Amount: \$505.39
+	Parcel: 028/0610-143-6519-7	<a href="#">Map</a>	Amount: \$122.40
+	Parcel: 028/0610-144-5278-0	<a href="#">Map</a>	Amount: \$122.40
+	Parcel: 028/0610-144-7535-0	<a href="#">Map</a>	Amount: \$122.40
+	Parcel: 028/0610-144-7568-0	<a href="#">Map</a>	Amount: \$505.39
+	Parcel: 028/0610-144-7823-5	<a href="#">Map</a>	Amount: \$122.40
+	Parcel: 028/0610-144-7834-2	<a href="#">Map</a>	Amount: \$122.40
+	Parcel: 028/0610-144-7889-7	<a href="#">Map</a>	Amount: \$505.39
+	Parcel: 028/0610-144-7922-5	<a href="#">Map</a>	Amount: \$505.39
+	Parcel: 028/0610-144-9045-3	<a href="#">Map</a>	Amount: \$505.39
+	Parcel: 028/0610-144-9600-0	<a href="#">Map</a>	Amount: \$97.39
+	Parcel: 028/0610-232-1401-0	<a href="#">Map</a>	Amount: \$122.40
+	Parcel: 028/0610-232-8350-8	<a href="#">Map</a>	Amount: \$505.39

Caution: Manually import or open CSVs into Excel, do not double click to open.  
 Excel will strip leading and trailing zeros, if columns are not set properly.

When valid parcels have it will look like the above. A couple of notes:

- All editing, find and replace etc... work based on the SELECTED records in the table above. To perform updates, first make sure the records are selected (to do so, select ALL by the Select Rows near the top or select manually for a partial selection)
- Individual parcels can also be selected/unselected
- Information about the parcel can be viewed by selecting the GREEN + button
- The DCiMap version of the record can be viewed by selecting MAP
- Sorting can be done
- The entire list can be downloaded as CSV
- When records are selected, they will appear orange:

**Select Rows**

**Sort By**

**Display Additional Info**

Number Of Parcels: 38  
 Total Amount: \$11,989.01

Number Of Selected Parcels: 38  
 Total Of Selected Parcels: \$11,989.01

+	Parcel: 028/0610-133-8690-7	<a href="#">Map</a>	Amount: \$505.39
+	Parcel: 028/0610-143-6519-7	<a href="#">Map</a>	Amount: \$122.40

## SAVING/FINISHING CODE

- Saving Work will save any progress made on a code. You will be able to exit AccessDane and return later with the update available.
- Finish Code will lock the code and notify the specials administrator that the code has been completed. At this point, nothing has been submitted to Dane County. The Specials Admin will still be able to unlock and make edits to the code.

Finish Code

Clicking finish will signal to your organization's Specials administrator that you are done with adding parcels and values to this Specials Code for this year.

Once finished has been clicked this code will be locked from further editing, you will need to talk to your organization's Specials administrator if you need to unlock this code.

**Any parcel with a code amount of zero will be removed at this point.**

**Are you finished editing for this year?**

Finish

Cancel

- To the Specials Admin, the code will now appear grayed out. When all special codes have been finished, the Specials Admin will have an option available to Submit Codes to the County:

Submit TOWN OF DUNN Codes

Button is enabled once all available codes assigned to TOWN OF DUNN have been marked as finished.

Submit Codes to County

- The specials have now been submitted to the County and an email notification will be sent to the Specials Admin:

From: property.listing@countyofdane.com  
 To: Everson, Troy  
 Cc:  
 Subject: D03 SD #2 has been marked as finished

Troy M Everson has marked D03 SD #2 as finished for TOWN OF DUNN.