NCVTS Training Guide

Your Guide to Understanding NCVTS
## Table of Contents

**Module 1: Foundation** ................................................................. 4  
Chapter 1: NCVTS Overview ....................................................... 6  
Chapter 2: Getting Started ....................................................... 14  
Chapter 3: Abstract Overview ................................................... 24  

**Module 2: Adjustments, Prorations, and Refunds** ....................... 38  
Chapter 1: Creating Adjustments based on Taxpayer Request ............... 40  
Chapter 2: Creating Prorations and Processing Refunds .................... 60  

**Module 3: Abstract Processing** ................................................. 74  
Chapter 1: Valuation Queues ..................................................... 76  
Chapter 2: All Things Situs ....................................................... 108  

**Module 4: Configuration and Maintenance** ................................ 130  
Chapter 1: Users and Roles ....................................................... 132  
Chapter 2: System Maintenance ............................................... 141  

**Module 5: NCVTS Reports** ....................................................... 162  
Chapter 1: NCVTS Reports Overview ......................................... 164  
Chapter 2: NCVTS Standard Reports .......................................... 175  
Chapter 3: NCVTS Finance Reports ............................................ 192  

**Appendices** .............................................................................. 203  
Appendix A: NCVTS Terminology .............................................. 205  
Appendix B: NCID Instructions .................................................. 207  
Appendix C: Situs File Layout/Data Elements ................................ 210  
Appendix D: Situs Error Log Definitions ...................................... 213  
Appendix E: Printing a Tax Receipt ............................................ 215  
Index ............................................................................................. 216
Key

The icons appearing in the margins and main body of this training guide are defined below.

- **Best Practice.** Provides suggestions and recommendations of how to make the best use of the North Carolina Vehicle Tax System (NCVTS).
- **Information.** Provides relevant information that supplements the content in the adjacent text.
- **Reference.** Tells you where to go to find additional information on a topic.
- **Note.** Provides information related to the training materials or exercises.
- **Set the Stage.** Provides a realistic scenario for the exercise that follows.
- **Tips and Tricks.** Provides additional information to make the most efficient use of NCVTS.
- **Warning.** Provides valuable Dos and Don’ts and related information critical to working in NCVTS.
MODULE 1: FOUNDATION
Chapter 1: NCVTS Overview

The NCVTS Overview chapter establishes a solid foundation for learning the North Carolina Vehicle Tax System (NCVTS). The chapter presents the business needs and purpose of NCVTS, as well as flow diagrams of data upload, processing, and output.

Objectives

- Understand the business purpose of NCVTS
- Understand the flow of data in NCVTS
The Business Purpose of NCVTS

The North Carolina Division of Motor Vehicles (DMV) serves as the collection authority for all 100 local governments of North Carolina. NCVTS integrates with existing systems (e.g. STARS) and is responsible for determining vehicle values, verifying situs addresses, applying tax districts, and calculating vehicle taxes.

House Bill 1779, ratified in 2005, and signed into law under Session Law 2005-294, modified the collection process for vehicle property taxes and registration fees on registered motor vehicles in the State. The law mandates combining the payment of taxes and registration fees at the time of registration and became effective on July 1, 2013. Benefits of the changed business process include:

- Improving the experience for taxpayers by providing additional payment options and single bill for registration and vehicle property tax
- Increasing revenue for the counties
- Improving vehicle property tax collection timeframe for the counties

The NCVTS listserv provides a forum for questions and up to date information on the vehicle tax system. Subscribe using the following link: https://www.sog.unc.edu/resources/listservs/north-carolina-vehicle-tax-system-ncvts.
Each month DMV identifies the vehicles that are up for registration/renewal. On the last Saturday of each month, these records are sent by the DMV from the State Title and Registration System (STARS) to NCVTS. The records will go through a series of system validations. County users will determine value, situs and taxable status of the vehicles. At the end of each month, NCVTS will send the billing batch file to STARS. Tax bills are combined with the vehicle registration on the invitation to renew and DMV will mail and collect the taxes. The North Carolina Department of Transportation (DOT) Fiscal Section will distribute local tax revenue to the counties, who will in turn distribute to the other taxing units.
NCVTS Flow

Assessment

Before data is received in the NCVTS each month, the data will go through the vehicle valuation process. A value will be assigned to the vehicle if a match can be found. If no match is found, a median value is used. Once data is received in NCVTS, validations will occur to determine if abstracts are ready for billing. If an abstract is not ready for billing, a representative will need to work the abstract from a queue to get it ready for billing. Once an abstract is cleared from the queue, the system will set the status to RFB (Ready for Bill). If abstracts are not worked during the month, they will be processed with default data. For example, taxes will be calculated on the NCDOR median value for abstracts in the NO_VALUE queue.

Each month the batch billing process will create bills for abstracts with a status of RFB (Ready for Bill) and send to STARS.

Abstract:
Each month, DMV sends information to NCVTS about vehicles up for registration renewal. The information for a single vehicle is called an abstract. A single vehicle will have a separate abstract every year.

Queue:
A set of records that share common information and require work and/or review by county personnel. For example, abstracts that contain notes for review are accessible from a single “queue” called the NOTES queue.

RFB (Ready for Bill):
Abstracts that are sent from the DMV through the DMV Upload process that do not require additional review by the county are automatically marked with a status of RFB (Ready for Bill).
**Valuation Process:**
When the DMV Upload occurs, each vehicle is matched with a value based on the information from TEC Data Systems.
NCVTS Flow (continued)

Billing

The tax bill and the vehicle registration will be combined into one notice called the invitation to renew and STARS initiates the printing and mailing process. When a taxpayer pays their bill, the payment is recorded in STARS and the information is sent to NCVTS. A taxpayer may request an adjustment to their bill for various reasons. As a county user, you will create an adjustment request in NCVTS. Once the adjustment is approved, the taxpayer will be able to pay their bill for their adjustment amount. If the adjustment is denied, the values are reset to their original value in the system and the bill remains the same.
**Payment**

Taxpayers may pay their bill using a variety of methods, including online payment, mailing in a check, or walking into a License Plate Agency (LPA) office. All payments are received by DMV and will be distributed to the counties in a batch process by DOT Fiscal. The counties will distribute to the other taxing units in their county. Taxpayers may request their bill be prorated for various reasons. Refund requests are initiated by the county appraiser using NCVTS. If the refund is approved, the county office will process the refund and mail to the taxpayer.
Chapter 2: Getting Started

The Getting Started chapter presents high-level concepts to users that allow them to access, navigate, and search records in NCVTS.

Objectives

- Access NCVTS
- Understand a web page and functionality
- Understand user permissions
- Navigate NCVTS
- Search for records in NCVTS
Accessing NCVTS

The North Carolina Identity Service (NCID) is the standard identity management and access service provided to state, local, business, and individual users. NCID provides a high degree of security and access control to real-time resources. To access NCVTS, you must obtain an NCID by request through a delegated administrator for your county.

Exercise Steps

1. From the Favorites Menu Bar of Internet Explorer, click the NCVTS-Login link.

The NCID login page will display.

2. Enter your assigned User ID and Password, then click the NCID Login button.

The NCVTS Main Menu page will display.
Navigating NCVTS

Once logged into NCID, the NCVTS Main Menu page displays. From this page, State and County Administrators will use the Admin menu to access specific activities related to their role. County Administrator role and user management are discussed in Module 4. For most users, to begin working in NCVTS, you will need to navigate to a search page.

There are three different ways you can navigate to a search page from the Main Menu page:

- NCVTS Main Menu
- Specific search links in center of page
- Search link in top right corner

To navigate to specific search criteria, you can select one of the links located in the center of the Main Menu page or navigate to the NCVTS Menu and select your option.

The easiest way to begin using the system is to use the Search link at the top right corner of the page. Clicking on the Search link will direct you to the Abstract Search Page which also serves as the home page while working in the system.
Navigating NCVTS (continued)

Exercise Steps

1. Click the Search link.

The menu options change from the Main Menu page. We will cover the menu items throughout this guide.

The Abstract Search page displays.
Understanding a Web Page and Functionality

There are a few common features and functionalities of a web page that are helpful to understand prior to navigating in the NCVTS.

**Back Browser Button (Do Not Use)** - When navigating through NCVTS, do not use the back button located in your web browser. Navigate throughout the system using the functionality built into the system.

**Window Scroll Bar** - Sometimes the information or data entry fields in the NCVTS application take up more space than is viewable on your PC monitor. When this happens, you will see a scroll bar on the right hand side of the application window. This will allow you to view the additional information by scrolling the bar up or down.

**Hyperlink** – A hyperlink (or link) is a word or group of words that you can click on to jump to another page.

**Breadcrumbs** – A navigation aid that allows you to keep track of your location within the system. Breadcrumbs are also used as a back feature in NCVTS.

**Close Browser Button (Do Not Use)** – For security purposes, do NOT use the Close (X) button in the top right of the browser window. Always use the Logout option to exit the NCVTS application, as this correctly ends your session. The Logout option is located under Options on the Main Menu page.
Searching for Records in NCVTS

When searching for vehicle records there are two basic search processes:

- Quick search
- Advanced search

Use the quick search function to find a vehicle abstract record based on minimal information. For example, abstract, title number, bill, or license plate number and tax year. Quick search finds one record for the year selected.

Use the advanced search function to search abstracts based on a variety of criteria, including:

- Abstract
- Situs Address
- Adjustment
- Bill
- Appeal

When performing an abstract search, you do not need to enter the preceding zeros of the Abstract #.

The Year For selection is for the tax year the abstract was billed. The valuation year is based off of the date of renewal and may be different.
Using the Quick Search

A Quick Search can be performed by entering criteria into the Quick Search location on the main menu navigation bar. You can perform a quick search based on multiple criteria, including:

- Abstract
- Plate
- Title
- VIN
- License
- Bill
- Appeal

**Exercise Steps**

1. Select the Plate # option from the Quick Search drop-down list, and then type the Plate # in the field.

2. Select the tax year you wish to search for.

3. Click Go.

The system executes a search based on the specific plate number and tax year and displays the Maintain Vehicle Abstract page.
Using the Advanced Search

There are five tabs on the search screen which allows you to enter additional criteria when searching for abstracts. To change the search criteria, simply click on the tab name to display the criteria for the category.

**Abstract Search Tab**

Users can search for abstracts by criteria such as owner name, address, billing criteria and flags.

**Situs Address Search Tab**

Users can search for abstracts by providing situs address details.

To narrow your search results, make a selection from the Status drop-down menu.

You can use an asterisk (*) as a wildcard character when searching with text fields. The * is like a placeholder. For example, if you want to search for owners with the last name Johnson or Johnston, enter JOHN* in the Owner field.
**Adjustment Search Tab**

Users can search for adjustments based on specified criteria. You may review adjustment transactions and access the corresponding abstract.

**Bill Search Tab**

Users can search for vehicle tax bills to view or take action.

**Appeal Search Tab**

Users can search for pre-existing appeals based on specified criteria.
Chapter 3: Abstract Overview

The Abstract Overview chapter provides a baseline for future use of abstracts. The chapter includes conceptual information on abstract records and how valuations are assigned as well as a comprehensive review of the layout of and information presented in an abstract vehicle record. Attendees will receive hands-on practice in navigating, editing, and saving an abstract.

Objectives

- Understand abstract records
- Understand the valuation process
- Search for abstract records
- Locate information on an abstract
- Edit an abstract
- Add notes to an abstract
Abstract Records

Each month the NCDMV identifies the vehicles that are up for registration/renewal. On the last Saturday of each month, these records are sent by the DMV from STARS to NCVTS. As we discussed in the terminology section, these records are referred to as abstracts. They are the core of NCVTS.

When these monthly records come from STARS, approximately 90% of the vehicle records that come into NCVTS each month will be automatically processed and no additional work will be required at the county level.

The remaining 10% or so of abstracts from the DMV upload will have some type of issue that requires review and/or work by county personnel. As you work through these issues and resolve them in NCVTS, STARS is updated in real time.
Searching for Abstract Records

County users can locate any abstract in NCVTS using the Abstract tab on the Search page. This tab offers sets of fields by which users can locate a specific record or set of records.

Sets of Search Fields

- General abstract fields
- Owner information
- Lessee
- Vehicle
- Situs address
- Mailing address
- Flags
- Billing date range

After entering the values you want to search on, clicking the Search button will display the matching records. From the Vehicle Tax Search Results page you can open an abstract, view the history of a single VIN, and display the content of notes added to an abstract.

You need to review the abstract for a vehicle currently up for renewal. Using the search functionality in NCVTS, you locate the record and view the VIN history.

Exercise Steps

1. Click the Search link in the upper right of the page.

The Abstract Search page displays.
Module 1: Foundation
Chapter 3: Abstract Overview

Searching for Abstract Records (continued)

2. On the Search page, enter or select the following:

<table>
<thead>
<tr>
<th>Status</th>
<th>RFB (Ready for Bill)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last (Owner Information)</td>
<td>JONES</td>
</tr>
</tbody>
</table>

3. Click the **Search** button in the upper right of the tab.

4. On the Vehicle Tax Search Results page, click an **Abstract # link** to open a record.

The abstracts matching the search values display on the Vehicle Tax Search Results page.

5. Click the **Abstract Search Results** link in the breadcrumbs.

The Vehicle Tax Search Results page displays the previous set of search results.

---

By default, 25 records appear on a single page. To view records on other pages, click the page numbers above the grid.

Do not use the Back button of your browser to return to search results.
Searching for Abstract Records (continued)

6. Click a **Vin #** link to view information about a single vehicle’s ownership.

The results grid is similar to a spreadsheet. Click a column heading highlighted in blue to sort the rows by that field.

The VIN History window displays.

7. Click the **X** in the top right of the window.

The Vehicle Tax Search Results page returns.
Searching for Abstract Records (continued)

8. Click the New Search button at the top of the page.

   ![Search Page Buttons](image)

   The Search page displays without the previous search criteria.

9. Enter other search criteria to search for records of your choosing.

### Search Page Buttons

Below is a brief description of the functionality of each button on the Abstract Search page.

<table>
<thead>
<tr>
<th>Button</th>
<th>Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export</td>
<td>Use this button to export information on the selected abstracts to a file that you can use to generate letters.</td>
</tr>
<tr>
<td>Value Lookup</td>
<td>Use this button to search for the value of a vehicle for the selected abstract.</td>
</tr>
<tr>
<td>Notes</td>
<td>Use this button to review and manage notes on a selected abstract. You can select multiple abstracts and add the same note to all using this feature.</td>
</tr>
<tr>
<td>Add to Abstract Service Cart</td>
<td>Use this button to include the selected abstracts in a list that is visible only to you.</td>
</tr>
<tr>
<td>New Search</td>
<td>Use this button to clear the previous search and start over.</td>
</tr>
<tr>
<td>Jump to Row</td>
<td>Use this button to move to the first row that contains information you specify, such as a model or owner.</td>
</tr>
</tbody>
</table>

We will discuss the buttons on the Abstract Search page as we move through the course.
Exporting Data for Use Outside of NCVTS
INSTRUCTOR DEMONSTRATION ONLY

The Export button at the top of the Maintain Abstract Detail page and the Abstract Search page allows you to send information on an abstract to a spreadsheet. This functionality is intended for creating mailings to taxpayers, so the options available for export are based on the information needed for a particular type of correspondence. Once the information is in the spreadsheet, you must use some external process for creating the mailings.

**Exercise Steps**

1. From the Vehicle Tax Search Results page, select the checkbox for each abstract for which you want to export information.

2. Click the Export button at the top of the Vehicle Summary section.

The Letters/Correspondence pop-up window appears.
Module 1: Foundation
Chapter 3: Abstract Overview

Exporting Data for Use Outside of NCVTS

INSTRUCTOR DEMONSTRATION ONLY

3. Select the type of letter for which you need abstract information.

4. Click the Export button.

5. In the message window, click the arrow on the Save button and select the Save as option.

The Save As window displays.

6. Navigate to and select the desired location where you want to store the file.

7. Click the Save button.

The information is saved to a CSV file. You can use this file to create mass mailings outside of NCVTS.

NCDOR letter templates are located on the NCVTS portal.
Information on an Abstract

Abstract records contain a lot of information organized into sections and tabs. The main tabs of an abstract are:

- Abstract Info
- Property Info
- Adjustments
- Change History
- Notes

Header

Overall information on each abstract record includes the owner and abstract number, any queues the abstract is in currently, and a set of buttons and links that allow you to take action on the record.

Abstract Info Tab

The Abstract Info tab contains overall information on the abstract, including owner name(s), Situs address, tax district(s), and the total assessed value used in tax calculations.
Information on an Abstract (continued)

**Property Info tab**

The Property Info tab includes the majority of fields that you might update when working with abstract records.

The information on this tab is further divided into three additional tabs: Vehicle Info, Valuation, and Lien.

---

Overall (header) information on the Property Info tab includes the description, exemption status (if any), and the total assessed value of the vehicle.

The Valuation tab includes four tabs to capture information on additional body types.
Information on an Abstract (continued)

*Adjustments Tab*

After an abstract is billed, if any adjustments are made, these appear on the Adjustments tab. From this tab you can see the status of the adjustment as well as details of each value that changed on the abstract with the adjustment.

![Adjustments Tab Example](image)

*Change History Tab*

The Change History tab shows each change made to the abstract. Information for each change includes the date and time the change was made in NCVTS, the username of the person who made the change, the field name that was changed, and the old and new value.

![Change History Tab Example](image)

*Notes Tab*

The Notes tab includes any notes added to the abstract.

![Notes Tab Example](image)
Adding Notes to an Abstract

You can add a note to an abstract at any time, regardless of the abstract’s status. Notes may be added and edited from the Notes tab or from the Vehicle Tax Search Results page.

You also have the ability to upload scanned copies of documents into NCVTS.

Rather than uploading a scanned image, consider uploading a document that contains a link to the image. If you use this approach, you can keep all of your scanned documents in a single location outside of NCVTS and access them as needed.

Exercise Steps

1. From the Maintain Vehicle Abstract page, click the Notes tab.

   The Notes tab displays.

2. Click in the text box that states TYPE NOTE HERE…. and type the information you want to add.

3. Select Temporary or Permanent.

   A note may be either temporary or permanent. This status determines whether the abstract will be up for review next year because of the note. We will cover this process in greater detail in Module 2: Abstract Processing.
Adding Notes to an Abstract (continued)

4. Click the **Add** button in the Add Note section.

![Add Note button](image)

The Note is added to the abstract.

5. Click the **Submit Notes** button at the top of the Notes tab.

![Submit Notes button](image)

The note is saved with the abstract and a note icon will appear on the Notes tab.

**Editing a Note**

1. From the Maintain Vehicle Abstract page **Notes** tab, locate the note you wish to edit and select **Edit**.

![Edit note](image)

2. Edit your note and click **Save**.

![Save button](image)
Module 2: Adjustments, Prorations, and Refunds

Chapter 1: Creating Adjustments Based on Taxpayer Request
Chapter 1: Creating Adjustments based on Taxpayer Request

At the end of the month, the batch billing process runs and all abstracts from the current month’s DMV Upload are billed. In this chapter, we will be creating adjustments to previously billed abstracts. In most cases, adjustments will require approval, so we will also review and approve/reject adjustments.

Objectives

- Understand the adjustment process
- Understand appeals vs. adjustments
- Search for and review an existing adjustment
- Create an adjustment based on a military exemption
- Create an adjustment to decrease vehicle value due to high mileage
- Create an adjustment to decrease vehicle value due to condition
- Approve or reject adjustments
Module 2: Adjustments, Prorations, and Refunds
Chapter 1: Creating Adjustments Based on Taxpayer Request

The Adjustment Process

Once the Batch Billing Process runs at the end of the month, any changes to the abstract are made as adjustments. Adjustments typically go through an approval process, although each county can configure NCVTS to allow automatic approval of adjustments below a set dollar amount.

An abstract may have one or more pending adjustments waiting for approval. Approved adjustments are reflected on the abstract while pending and rejected adjustments appear on the Adjustments tab of the Maintain Vehicle Abstract page.

Approved adjustments: If the bill was unpaid, a new bill is generated overnight and mailed to the taxpayer.

The taxpayer may also pay the newly adjusted bill the same day. STARS is updated in real time and if the bill is paid before the overnight process, a new bill will not be mailed to the taxpayer.
The taxpayer has five years to appeal the situs under N.C.G.S. 105-381. Valuation appeals must be submitted in writing within 30 days of the date taxes are due per N.C.G.S. 105-330.2.

Appeals vs. Adjustments

While the majority of counties will create adjustments in NCVTS when a taxpayer appeals their bill, there is a set of features in NCVTS specifically for formal appeals. In NCVTS, the Appeals feature includes separate appeal records, scheduling, and multiple levels of review/approval. Since we anticipate that most counties will not track appeals to this level in NCVTS, this training course will not cover Appeal records, workflows, etc.
Searching for and Reviewing an Existing Adjustment

Any adjustment created in NCVTS can be located and viewed from the Adjustment tab of the main Search page. This search option allows you to find adjustments based on who created them, when they were created, when they were processed, and by current status.

When using the Adjustments tab of the Search page, you are presented with a list of adjustments that meet your criteria. All adjustments for an abstract appear on the Adjustments tab of the Maintain Vehicle Abstract page.

You want to see a list of all adjustments that were approved in the last two months. Using the search functionality in NCVTS, you pull a list of all approved adjustments for this time span.

Exercise Steps

1. Click the Search link in the upper right hand side of the page.

   The Abstract Search page displays.

2. Click the Adjustment tab.
Searching for and Reviewing an Existing Adjustment (continued)

3. In the **Adjustment Status** field, select the **Approved** status and click the **Search** button.

4. Click the Abstract # field to open the abstract.

The Maintain Vehicle Abstract page displays.

5. Click the **Adjustments** tab.

The Adjustment information displays.
Create an Adjustment Due to Military Exemption

Under certain circumstances, a taxpayer can be exempt from paying some or all of the taxes and fees normally owed on a vehicle. Exemptions are marked as either temporary or permanent in NCVTS. When marking an exemption as permanent or temporary, keep in mind the following:

**Temporary Exemptions**
- Apply only to the current abstract; future abstracts will be taxed as usual
- Since the exemption is for the entire year, no dates are entered on the abstract

**Permanent Exemptions**
- If a permanent exemption has no end date, the abstract will appear in next year’s EXEMPT queue
- If the permanent exemption has a start and end date, the abstract will not appear in the EXEMPT queue if the bill due date falls within the time of exemption

If the exemption is for only a portion of the vehicle’s value, all fees for the appropriate tax jurisdictions are applied in full.

The spouse of an active-duty service member has provided their sponsor’s Leave and Earnings Statement and the associated paperwork required for partial exemption from taxes. You need to locate the abstract in NCVTS and update it with the 50% exemption.

**Exercise Steps**

1. Click the **Search** link in the upper right of the page.

The Abstract Search page displays.
Create an Adjustment Due to Military Exemption (continued)

2. Enter the search criteria for the abstract you want to work, and then click the **Search** button.

   The Vehicle Tax Search Results page displays.

3. On the Vehicle Tax Search Results page, click the **Abstract #** link of your abstract.

   The Maintain Vehicle Abstract page displays.

4. Click the **Create Adj** button.

   ![](image1.png)

5. Click the **Property Info** tab, and then click the **Valuation** tab.

   ![](image2.png)

   Changes to value or exemption status can be entered before the abstract is billed. If the abstract is in an RFB status, click the Make Not RFB button. The abstract fields will become available.
Create an Adjustment Due to Military Exemption (continued)

6. Enter or select the following:

<table>
<thead>
<tr>
<th>Exemption</th>
<th>Military Permanent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exempt</td>
<td>Pct</td>
</tr>
<tr>
<td>Exempt Percentage</td>
<td>50</td>
</tr>
<tr>
<td>Exemption Start Date</td>
<td>[Enter today’s date]</td>
</tr>
</tbody>
</table>

7. Click the Submit button at the top right of the page.

⚠️ Only use a Permanent status if you have an exemption start and end date.
Create an Adjustment Due to Military Exemption (continued)

8. Select an Adjustment Reason.

9. Click the Submit button.

10. Add a Note to the abstract.
Create an Adjustment Due to Condition

When a vehicle’s value is impacted by its condition, you can adjust the abstract to reflect the lower value. In NCVTS, a reduction in value based on a vehicle’s condition is entered using an Adjustment Type of Condition. The adjusted value can be set to temporary, which will apply only to this year’s abstract, or permanent, which will affect the value of future year’s abstracts.

If a vehicle has high mileage and other issues with its condition, you can use the high mileage calculation or simply enter the high mileage and enter/calculate the vehicle’s value separately. In other words, you can record the high mileage of a vehicle and not use the value in calculating the new vehicle value.

Adjustments Types

When creating a condition adjustment, the following Adjustment Types can be selected on the abstract.

<table>
<thead>
<tr>
<th>Adjustment Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Value</td>
<td>Use when the vehicle is considered to have features that increase its value.</td>
</tr>
<tr>
<td>Vehicle Cond/Salvage</td>
<td>Use when the vehicle is damaged or has a branded title.</td>
</tr>
<tr>
<td>High Mileage</td>
<td>Use when the mileage on the vehicle is greater than average.</td>
</tr>
<tr>
<td>Sales Price</td>
<td>Sales price is the value of a vehicle purchased from a registered motor vehicle dealer</td>
</tr>
<tr>
<td>Starting Date</td>
<td>Use when the adjustment includes the Starting Date, Starting Value, and Minimum Value fields with a set Depreciation Schedule.</td>
</tr>
</tbody>
</table>
Create an Adjustment Due to Condition (continued)

A taxpayer has objected to the value of their vehicle due to its current condition. You can create an adjustment in NCVTS and lower the value of the vehicle due to its condition.

**Exercise Steps**

1. Click the **Search** link in the upper right of the page.

![Abstract Search page](image)

The Abstract Search page displays.

2. Enter the search criteria, and then click the **Search** button.

The Vehicle Tax Search Results page displays.

3. Click the **Abstract #** link of your abstract.

The Maintain Vehicle Abstract page displays.

4. Click the **Property Info** tab, and then click the **Valuation** tab.

![Property Info and Valuation tabs](image)
Create an Adjustment Due to Condition (continued)

5. Enter or select the following:

<table>
<thead>
<tr>
<th>Adjustment Type</th>
<th>Vehicle Cond/Salvage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Override</td>
<td>Temporary</td>
</tr>
<tr>
<td>Override Pct</td>
<td>75</td>
</tr>
</tbody>
</table>

6. Click the Submit button at the top right of the page.

The Final Value field shows the value used for tax calculations.

7. Add a Note to the abstract.

⚠️ If you try to create an adjustment that results in no change to the bill, no adjustment will be created and the abstract will be immediately updated with the changes without going through the usual adjustment approval flow. Users will receive the alert message below:

⚠️ If the Adjustment Type on an abstract is Condition, Add Value, or New Value, a Temporary Override status will cause next year’s abstract to populate the Condition queue. This is different from Exemptions, where a status of Permanent will cause next year’s abstract to appear in the Exempt queue.

⚠️ If you set the Override Status to Permanent for Condition, Add Value, or New Value adjustments, the value will be fixed for all future abstracts for this VIN until the owner changes. This is the third option if you want to set a minimum value for a vehicle.
Creating an Adjustment Due to High Mileage

If you need to lower the final value on a billed abstract, you must create an adjustment. Adjustments are created from the Maintain Vehicle Abstract page and, once approved/rejected/submitted, can be viewed on the Adjustments tab. NCVTS includes functionality that allows you to calculate a vehicle’s value based on the vehicle’s age and current mileage.

The abstract will not reflect any changes made through an adjustment until the adjustment is approved. You may have the right to approve adjustments yourself, or you may need someone in your county to approve the adjustment after you create it.

Exercise Steps

1. Type the abstract # in the Quick Search field and click the Go button.

2. Click the Create Adj button in the top right of the page.

After receiving their bill, a taxpayer contacted your office about lowering their vehicle’s value based on high mileage. They sent in appropriate documentation of the mileage, so you need to create an adjustment on the previously billed abstract.
Creating an Adjustment Due to High Mileage (continued)

3. Click the Property Info tab, and then click the Valuation tab.

The Valuation tab displays.

4. Enter or select the following:

<table>
<thead>
<tr>
<th>Adjustment Type</th>
<th>High Mileage</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Mileage Odometer</td>
<td>[Enter a high mileage based on the vehicle’s age]</td>
</tr>
</tbody>
</table>

5. Click the Calc HM button to calculate the new value based on mileage.

The Override amount and percentage good display.

6. Select an Override Status of Permanent.

7. Click the Submit button.

The Adjustment Reason pop-up window displays.

If you want to review this abstract each year, set the Override Status to Temporary. This abstract will appear in next year’s Condition queue.
Creating an Adjustment Due to High Mileage (continued)

8. Select an Adjustment Reason.

9. Click the Submit button.

The decrease in value due to high mileage is saved. The adjustment must be approved before it can be processed.

10. Add a Note to the abstract.

Check the Add Refund Payee box to change the mailing address information.

If you are adjusting an abstract to increase the vehicle’s value, you follow these same steps. Be sure to use the Adjustment Type of Add Value.
Module 2: Adjustments, Prorations, and Refunds
Chapter 1: Creating Adjustments Based on Taxpayer Request

Creating an Adjustment for a Situs Address Change

If the Situs address is incorrect and the abstract is billed, you can create an adjustment to correct the Situs and tax districts. For example, if you do not work an abstract in the Default Address queue or if a taxpayer moves inside your county, the situs address for the billed abstract will not be correct.

A taxpayer has come into your office because they are questioning their bill. When you open their record, you see that the record was in last month’s Default Address queue, but not processed. You need to create an adjustment in NCVTS to correct the address.

Exercise Steps

1. Using the Quick Search, open the abstract you need to change the address on.

2. Click the Create Adj button.

3. Click the Clear button in the Situs Address section.

4. Enter the St. Name of the Situs address.

5. Click the Validate Address button.
Creating an Adjustment for a Situs Address Change (continued)

6. Select the radio button for the correct Situs address, and then click the Submit button.

7. Click the Submit button at the top right of the page.

8. Select an Adjustment Reason.

- Adjustment Reason: Situs error

9. Click the Submit button.

The refund payee information follows the record, but only an indicator is sent to the DMV when the adjustment is approved.
Approving and Rejecting Adjustments

When adjustments to billed abstracts are submitted, they must then be reviewed and approved or rejected. All adjustments pending approval appear in the Adjustments Pending Queue.

A number of adjustments to billed abstracts need review. You need to go review each adjustment and approve or reject them as appropriate.

Exercise Steps

1. From the Workflow menu, select Adjustments Pending Queue.

The adjustments that need review display.

Depending on your assigned roles in NCVTS, you may not have permissions to approve or reject adjustments. Be sure you know who does have these permissions in your county office.
2. Select the checkbox for the adjustment you want to approve or reject.

3. Click the Approve button.

   The adjustment was successfully approved. OR

4. Click the Reject button.

   The adjustment was successfully rejected.

   **Adjustments Before a Bill is Paid**

   If you enter an adjustment on an abstract for which the bill is unpaid, it is highly recommended that you do not let the taxpayer leave your office until the adjustment is approved in NCVTS. If you do not have the appropriate permissions to approve the adjustment, have someone with the correct permissions approve the adjustment while the taxpayer is there.
Refunds are typically generated due to overpayment of taxes when a bill is either adjusted or prorated. In the previous chapter we covered making adjustments after billing. In this chapter we will first cover how to prorate a bill and then cover how the refund process works.

Three types of refunds may be generated within NCVTS:

- Daily
- Adjustment
- Proration

**Objectives**

- Prorate a bill and generate a refund request
- Reverse a proration
- Understand the Pending Refunds queues
- Authorize an adjustment refund
- Void an authorized refund
- Search for and review an existing refund
Bill Proration

Bill proration occurs when the owner of the vehicle is billed and for whatever reason the number of months the bill due amount is based on, needs to change. Most often vehicle bills need to be prorated when the owner of the vehicle is billed and at later date sells the vehicle or moves out of state. In any case, a bill is prorated when a plate is surrendered and it eithers releases the obligation to pay the due amount, or refund of the payment already made.

A taxpayer notifies DMV that the vehicle being taxed has been sold 6 months after renewing the tag. They ensure they are only charged for the months they owned the vehicle; you will need to prorate their bill.

**Exercise Steps**

1. Using **Quick Search**, open the abstract you would like to prorate.

2. Go to the **Bill Detail** screen.

3. Click the **Prorate Bill** button.

The Prorate Bill pop-up window displays.
Bill Proration (continued)

4. Select or enter the following:

<table>
<thead>
<tr>
<th>Reason for Proration</th>
<th>Vehicle Sold</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plate Surrender Date</td>
<td>Today’s Date</td>
</tr>
</tbody>
</table>

5. Click the Calculate Proration button.

6. The estimated refund is auto-calculated.
Bill Proration (continued)

7. Click the **Submit** button.

8. Refund information page displays. Click the **Submit** button.

9. Click the + in the Transaction Summary section to view the proration.

### Printing a Refund

After prorating a bill, you have the option to print the information. The Print button offers the needed functionality to print the information from the page.

You can make changes to the Refund information page and the refund will be processed accordingly. This change only impacts this transaction. No changes are made to the abstract or bill nor is the information updated in STARS.

If you want to void a proration, you may do so if it was created today. Click the link in the Trans # column to open a page where you can void the refund.
Reversing a Proration

Exercise Steps

1. Using Quick Search, open the abstract you would like to prorate.
2. Go to the Bill Detail screen.
3. Open the Transaction Summary tab.
4. Click the Proration transaction number.

Some prorations may be auto-authorized if the refund is below a certain threshold. Before you can reverse a proration, you must wait at least one business day and void the authorization on the refund.

For instructions on how to void the authorization on a refund, see Void an Authorized Refund later in this chapter.

5. Select the reason for voiding the proration.

6. Click the Void button.
Refunds

A taxpayer receives a refund when they have overpaid on their taxes. Once a refund request is made, either by an overpayment, approved adjustment, or prorated bill, the refund will be in pending status. Refunds are available for approval in NCVTS after the nightly batch process runs. Refunds that require authorization will be available in the appropriate refund queue. Authorization for refunds may also be automatic in the system if the amount of the refund is below the set minimum amount.

Refunds that do not meet the criteria for automatic authorization will populate in one of three Pending Refunds queues:

► Adjustment
► Daily
► Proration

For adjustment refunds, a board meeting date must be selected before approving the refund.

Refunds must be requested within one year of the plate surrender date on DMV Form FS20 (receipt for plate surrender).

How to add and edit Board Meeting Dates are discussed in Module 4.
Refund Process

Adjustment Requested

Approved?

YES

Nightly Batch Process

NO
Adjustment data NOT updated on associated abstract

Notify Taxpayer

Refund automatically approved

Finance issues refund check to taxpayer

Pending Refund Adjustment Queue

Select a Date Board Meeting

Approve

Authorize
Authorizing an Adjustment Refund

Exercise Steps

1. From the Workflow menu, select Adjustment Queue from the list of [Pending Refunds].

2. Click the checkbox for the adjustment record(s) to approve.
3. Select a Board Meeting Date from the drop-down pick-list and click the **Set Board Date** button.

4. Click the **Approve** button.

5. Click the **Authorize** button.

The selected adjustment is no longer displayed in the Pending Refund Adjustment Queue.
Authorizing a Proration Refund

1. Proration Created
2. Nightly Batch Process
3. Automatically Approved Refund
   - YES: Finance to issue refund check to taxpayer
   - NO: Pending Refund Proration Queue

   AUTHORIZED
Authorizing a Proration Refund (continued)

Exercise Steps

1. From the Workflow menu, select Proration Queue from the list of [Pending Refunds].

2. Click the checkbox for the adjustment record to authorize.

3. Click the Authorize button in the top right corner of the page.

The selected refund is no longer displayed in the Proration Pending Queue.
Searching for an Existing Refund

To quickly search through all refunds in NCVTS, use the Refund Search function. In addition to viewing refunds, you may also void an authorization if needed.

Exercise Steps

1. From the Vehicle menu, select Refund Search from the list.

2. Select the following:

<table>
<thead>
<tr>
<th>Refund Type</th>
<th>Adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refund Status</td>
<td>Authorized</td>
</tr>
</tbody>
</table>

3. Click the Search button.
Void an Authorized Refund

If a refund is authorized in error you can void the refund after performing a refund search.

Exercise Steps

1. From the Vehicle menu, select Refund Search from the list.
2. Select the following:
   
<table>
<thead>
<tr>
<th>Refund Type</th>
<th>Daily</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refund Status</td>
<td>Authorized</td>
</tr>
</tbody>
</table>

3. Click the Search button.

4. Select the refund you want to void.

5. Click the Void Authorization button.
MODULE 3: ABSTRACT PROCESSING
Chapter 1: Valuation Queues

Introduction

The Valuation Queues chapter describes the concept of NCVTS vehicle tax queues as well as how abstracts appear in, and are processed through, queues.

Objectives

- Understand vehicle tax queues
- Understand abstract processing
- Export a list of abstracts
- Add abstracts to the Abstract Service Cart
- Process abstracts from the ANTIQUE queue
- Process abstracts from the VINTAGE queue
- Process abstracts from the PLUS_CODE queue
- Process abstracts from the CONDITION_CODE queue
- Process abstracts from the EXEMPT queue
- Process abstracts in the NOTES queue
- Process abstracts from NO_VALUE queues
- Process abstracts from the TRAILER queue
- Process abstracts from the RV queue
Abstract Processing from Queues

Abstracts that require attention populate the Vehicle Tax Queue with a status of Received. Once an abstract has been cleared out of the queue the abstract status changes to RFB (Ready for Bill) in the system. All abstracts are processed at the end of the month regardless of whether they have been worked individually through their queue(s).

Data from STARS will go through a valuation and Situs process. Abstracts which meet the criteria for one or more vehicle tax queues will be populated in the relevant queues the last Saturday of the month.

Criteria used to populate each queue:

<table>
<thead>
<tr>
<th>Queue</th>
<th>Criteria to Populate Queue</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Queues</td>
<td>All abstracts located in the Vehicle Tax Queue</td>
</tr>
<tr>
<td>No Value</td>
<td>Vehicles (buses, cars, motorcycles, and trucks) whose accurate value is not identified by DOR.</td>
</tr>
<tr>
<td>Antique</td>
<td>Vehicles that are 35 years old or older, which have a horseless carriage plate, or that have an Antique plate.</td>
</tr>
<tr>
<td>Notes</td>
<td>Vehicles with permanent notes attached to them in the previous year.</td>
</tr>
<tr>
<td>Condition</td>
<td>Abstracts where there is a condition code from the previous year and the override status is “T” (temporary).</td>
</tr>
<tr>
<td>Plus-Code</td>
<td>Vehicles that are flagged with a plus code by TEC and have a registered weight that is greater than or equal to the configured license weight set by DOR.</td>
</tr>
<tr>
<td>County Transfer</td>
<td>Abstracts transferred from another county</td>
</tr>
<tr>
<td>RV</td>
<td>Vehicles that qualify as a recreational vehicle and an accurate value is not identified by DOR.</td>
</tr>
<tr>
<td>Default Address</td>
<td>Situs address is not matched with the NCVTS Situs repository</td>
</tr>
<tr>
<td>Trailer</td>
<td>Vehicles with a body style of trailer or utility vehicle and accurate value is not identified by DOR.</td>
</tr>
<tr>
<td>Exempt</td>
<td>Vehicles which are permanently exempt from taxes.</td>
</tr>
<tr>
<td>Vintage</td>
<td>Vehicles 35 years or older and no antique plate</td>
</tr>
</tbody>
</table>
Vehicle Tax Queues

Depending on access rights and assignments, you may choose to view the queues in one of three formats:

- Basket View
- Group View
- Manager View

The three Vehicle Tax Queues are accessed from the Workflow menu.

The number of abstracts in each queue is in parentheses. The number decreases as abstracts are cleared from the queue.
Vehicle Tax Queues (continued)

Basket View

The Vehicle Tax Queue (Basket View) page displays all abstracts that are currently assigned to you. The functionality available on the Basket View page is the same as on the Group View page with the exception of the option to assign abstracts to other users.

1. From the Workflow menu, select Basket View from the list of [Vehicle Tax Queues].

Group View

The Vehicle Tax Queue (Group View) page provides a list of all vehicle abstracts that require action. The listing shows all assigned and unassigned work. Supervisors will assign/remove a range of abstracts for each user.

1. From the Workflow menu, select Group View from the list of [Vehicle Tax Queues].

Basket views are assigned by supervisors. The process can be done manually in the group view or by mass assignment during the DMV upload process.

Group View is where abstracts can be transferred to different users. If the county doesn’t assign users specific abstracts, all users will work from this view.
Vehicle Tax Queues (continued)

Manager View

The Vehicle Tax Queue (Manager View) page provides a summary of all registered motor vehicle abstracts requiring action, broken down by abstract status, queue statistics, and user. Key functions on this page include:

- Viewing processing status of all RMV abstracts
- Viewing summary queue statistics
- Viewing summary assigned user statistics
- Navigating to the Basket View of the selected user’s.

1. From the Workflow menu, select Manager View from the list of [Vehicle Tax Queues].
Exporting Search Results

The Search pages of NCVTS allow you to send the results of a search to a file that you can save and print as needed. After performing a search, clicking the Export to CSV link will create a CSV (Comma Separated Value) file that you can view using Microsoft Excel.

SET THE STAGE

It is the first of the month and you have abstracts in your basket view ready for processing. Before you process the abstracts, you want to keep a list of all the records you will process this month. You can use the Export functionality to keep a list of all records you will process each month.

Exercise Steps

1. From the Workflow menu, select Basket View or Group View from the list of [Vehicle Tax Queues].

2. Click the Export to CSV link.

3. A message appears asking whether you want to open or save the exported information.

4. In the message window, click the arrow on the Save button and select the Save as option.

The Save As window displays.

A CSV file is a type of file that you can open in Microsoft Excel. CSV stands for “comma-separated value.”
Exporting Search Results (continued)

5. Navigate to and select the desired location where you want to store the file.

6. Click the Save button. The records are saved to a CSV file.
Module 3: Abstract Processing
Chapter 1: Valuation Queues

Using the Abstract Service Cart

Each user has an Abstract Service Cart that allows you to add and remove abstracts of interest to you. Once you add an abstract to your cart it will remain in your cart until you remove it.

You are reviewing abstracts in the Default Address queue and realize you need to create a new address in your Situs repository before you can process the abstracts. You open the detail of the abstract and add it to your Abstract Service Cart.

Exercise Steps

1. From the Workflow menu, select Basket View or Group View from the list of [Vehicle Tax Queues].
2. Select the DEFAULT_ADDRESS radio button, and then click the Refresh button.

Abstracts in the DEFAULT_ADDRESS queue display in the Data Summary section.

3. Click the link in the Abstract # column to open an abstract.
4. Click the Add to Service Cart button.

A confirmation window displays.

Think of the Abstract Service Cart like the Favorites option of your web browser. Just like Favorites, the Abstract Service Cart is unique to you. Only you can add and remove abstracts from your service cart.

You can also add abstracts to the Service Cart from the Vehicle Tax Search Results page.
Using the Abstract Service Cart (continued)

5. Click the Close button.

![Image of a message box indicating a successful addition to the service cart]

The abstract is added to your cart for future reference.

6. From the Workflow menu, select Abstract Service Cart.

7. Select the checkbox for the abstract, and then click the Remove button.

![Image of the Abstract Service Cart with an abstract selected and removed]

The abstract is removed from your Abstract Service Cart.

If you want others to see the list of abstracts that need review, you can flag them. To flag a selected abstract, select Flag Abstract from the Vehicle menu.
Module 3: Abstract Processing
Chapter 1: Valuation Queues

Processing Abstracts from the ANTIQUE Queue

Vehicles with horseless carriage or antique plates, or those that are 35 years old or older will appear in the Antique queue. If NCVTS is configured to review antiques every three years, abstracts for antique vehicles will be automatically added to the queue three years from the original entry date. The review time is configurable for each county. If an abstract is approved for antique status, the bill will be calculated at a value of $500. If the abstract is rejected for antique status, the vehicle will be billed at the assessed value assigned to the vehicle.

---

A number of vehicle records are assigned to you that NCVTS has flagged as antiques. You need to go into the ANTIQUE queue and accept these records as antique status to clear them from the queue.

Exercise Steps

1. From the Workflow menu, select Basket View or Group View from the list of [Vehicle Tax Queues].

2. Select the ANTIQUE radio button, and then click the Refresh button.

Abstracts in the ANTIQUE queue display in the Data Summary section.

3. Click the checkbox beside the abstract you want to work, and then click the Edit button.

The abstract information displays in a pop-up window.
Processing Abstracts from the ANTIQUE Queue (continued)

4. Select the radio button **Accept**, then click the **Submit** button.

   ![Image of the Accept button](image1.png)

   The Basket or Group View displays; the number for the ANTIQUE queue decreases by one and the abstract has been cleared from the list. A value of $500 is placed on the vehicle. **Or**

5. Select the radio button **Reject**, then click the **Submit** button.

   ![Image of the Reject button](image2.png)

   This indicates the vehicle does not qualify for the reduced antique value and the DOR recommended value is placed on the vehicle.

**Changing Values**

If you need to change the value of an abstract while working the ANTIQUE queue, click on the Abstract # for the record you wish to change to pull up the Maintain Vehicle Abstract screen.
Processing Abstracts from the VINTAGE Queue

Vehicles that are 35 years of age or older and do not have an Antique or Horseless Carriage plate will be assigned to the VINTAGE queue. For the record to leave the queue, a value at or above the residual is entered in the Value field. While all that is required for an abstract to leave the VINTAGE queue is for a value to appear in the Value field, there are many methods for valuing a vehicle.

Exercise Steps

1. From the Workflow menu, select either Basket View or Group View under the Vehicle Tax Queues heading.

2. Select the VINTAGE radio button and click the Refresh button.

3. Click the checkbox for the desired record and click the Edit button.

If an abstract is not given a value, the bill will go out with the DOR Recommended Default Value based on the Make, Model, and Year of the vehicle.
Processing Abstracts from the VINTAGE Queue (continued)

4. To set a value that allows the valuation process to provide a value in subsequent years, type the value of the vehicle in the Value field. To set a valuation based on a set value and depreciation, type the Acquisition Year and Acquisition Cost, and then select the Depreciation Schedule; OR type the starting Value and Override amount and type, and then select the Override Status. Use the override method that works best for the vehicle.

5. Scroll down to the bottom of the page and click the Calculate Value button to verify that the correct Total Assessed Value will be saved to the abstract.

6. Add a Note on the abstract.

7. Click the Submit button at the bottom of the page.

The Basket or Group View displays; the number for the VINTAGE queue decreases by one and the abstract has been cleared from the list.
Module 3: Abstract Processing
Chapter 1: Valuation Queues

Processing Abstracts from the PLUS_CODE Queue

Abstracts in the PLUS_CODE queue have been flagged with a plus code by TEC and the vehicle weight exceeds a predefined limit set by DOR.

Abstracts with a flagged plus code and that exceed the predefined weight limit display a “+” sign in the Plus Code field. In the event the vehicle has an additional body type, you must provide a value for the addition in order to process the abstract through the queue. The value of the vehicle plus the value of the additional body will be added together to determine the Total Assessed Value of the vehicle.

A taxpayer installed a dump bed on their pick-up truck. The vehicle now has an additional body type and the abstract needs to be updated so the taxes will be calculated on the total value of the truck.

Exercise Steps

1. From the Workflow menu, select Basket View or Group View from the list of [Vehicle Tax Queues].

2. Select the PLUS_CODE radio button, and then click the Refresh button. The abstracts in your PLUS_CODE queue display in the Data Summary section.

3. Select the checkbox beside the abstract you want to work, and then click the Edit button.

At the beginning of the month, use the upload report to view all vehicles for possible bodies, in addition to the PLUS_CODE queue. Send a letter to the taxpayer for vehicles that may have a body, to obtain more information to value properly.
Processing Abstracts from the PLUS_CODE Queue (continued)

4. To set a value that allows the valuation process to provide a value in subsequent years, type the value of the body in the **Value** field. To set a valuation based on a set value and depreciation, type the **Acquisition Year** and **Acquisition Cost**, and then select the **Depreciation Schedule**; OR type the starting **Value** and **Override** amount and type, and then select the **Override Status**. Use the override method that works best for the vehicle. Select the correct type from the **Truck Body Type** field.

5. Scroll down to the bottom of the page and click the **Calculate Value** button to verify that the correct Total Assessed Value will be saved to the abstract.

6. Add a **Note** on the abstract.

7. Click the **Submit** button at the top of the page.

The Basket or Group View displays; the number for the PLUS_CODE queue decreases by one and the abstract has been cleared from the list.
Processing Abstracts from the PLUS_CODE Queue (continued)

No Added Value

If you review an abstract in the PLUS_CODE queue and determine that the additional body adds no value to the vehicle, you should select NA-No Added Value Body in the Truck Body Type field. This will prevent the abstract from appearing in the PLUS_CODE queue next year.

![Diagram showing Truck Body Type selection](image-url)
Processing Abstracts from the CONDITION Queue

Abstracts in the CONDITION queue have some type of condition code from the previous year and the override status is temporary.

- The following condition codes are available in NCVTS:

<table>
<thead>
<tr>
<th>Condition Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Value</td>
<td>Use when the vehicle is considered to have features that increase its value.</td>
</tr>
<tr>
<td>Vehicle Cond/ Salvage</td>
<td>Use when the vehicle is damaged or has a branded title.</td>
</tr>
<tr>
<td>High Mileage</td>
<td>Use when the mileage on the vehicle is greater than average.</td>
</tr>
<tr>
<td>Sales Price</td>
<td>Sales price is the value of a vehicle purchased from a registered motor vehicle dealer</td>
</tr>
<tr>
<td>Starting Date</td>
<td>Use when the adjustment includes the Starting Date, Starting Value, and Minimum Value fields with a set Depreciation Schedule.</td>
</tr>
</tbody>
</table>

You can request the taxpayer to provide an inspection receipt, service record, or oil change receipt to show the mileage of the vehicle. Be sure to ask for one as close to the January 1 valuation date as possible.

A condition was applied for a vehicle in the previous year. Taking into consideration the vehicle’s condition, you want to manually depreciate the value of the vehicle by 10% by entering an override.
Processing Abstracts from the CONDITION Queue (continued)

**Exercise Steps**

1. From the **Workflow** menu, select **Basket View** or **Group View** from the list of [Vehicle Tax Queues].

2. Select the **CONDITION** radio button, and then click the **Refresh** button.

   ![](image)

   Abstracts in the CONDITION queue display in the Data Summary section.

3. Click the checkbox beside the abstract you want to work, and then click the **Edit** button.

4. In the **Bus/Car/Motorcycle/Truck/Cab/Trailer and Chassis** section, enter and/or select the following:

<table>
<thead>
<tr>
<th>Override Type</th>
<th>Pct</th>
</tr>
</thead>
<tbody>
<tr>
<td>Override</td>
<td>90</td>
</tr>
<tr>
<td>Override Status</td>
<td>Permanent</td>
</tr>
</tbody>
</table>

   The override value is auto-calculated once you Tab or Click in the next field.

5. Scroll down to the bottom of the page and click the **Submit** button

   The Basket View or Group View displays; the number for the CONDITION queue decreases by one and the abstract has been cleared from the list.

---

Override is based on percent good.

If you want to set a permanent minimum value on a vehicle, use the Override type of **Val** and set the Status to Permanent. The abstract will not depreciate and won’t appear in next year’s queues.
Processing Abstracts from the EXEMPT Queue

Abstracts in the EXEMPT queue are exempt from tax based on their exemption code and a permanent override status or until the exemption end date. When processing these abstracts, you may accept or reject their exempt status. If you accept the exemption, the vehicle will be taxed according to its percent good/value (if any). If you reject the exemption, the vehicle will be taxed at the assessed value assigned.

There are abstracts in the EXEMPT queue. To clear the abstracts from the queue you will need to approve the exemption.

Exercise Steps

1. From the Workflow menu, select Basket View or Group View from the list of [Vehicle Tax Queues].

2. Select the EXEMPT radio button, and then click the Refresh button

Abstracts in the EXEMPT queue display in the Data Summary section.

3. Click the checkbox beside the abstract you want to work, and then click the Edit button

4. Select the Accept radio button and click the Submit button

The Basket View or Group View displays; the number for the EXEMPT queue decreases by one and the abstract has been cleared from the list.

Permanent exemptions will return each year. If you do not want the permanent exemptions to populate in the queue every year, set a future end date.

Temporary exemptions are automatically removed from their exempt status the next year.

If you do not process an abstract in the EXEMPT queue, at the end of the month the record will be processed as an exempt vehicle due to its permanent exempt status.
Processing Abstracts from the NOTES Queue

Abstracts in the NOTES queue have permanent notes attached to them from previous years. Changes to the abstract may or may not be necessary depending on the note. Abstracts with temporary notes will not show up in the queue next year, but the note remains associated with the abstract where the note was added. Notes on multiple abstracts can be accepted from the notes queue or reviewed and accepted individually.

Abstracts in the NOTES queue require your review. To process the abstracts you will need to review the notes on each abstract and accept the abstract as is.

Exercise Steps (Accepting Notes on Multiple Abstracts)

1. From the Workflow menu, select Basket View or Group View from the list of [Vehicle Tax Queues].

2. Hover over the notes icon to review notes on the abstract.

3. Select the checkboxes next to the abstract(s) whose notes you want to accept.
Processing Abstracts from the NOTES Queue (continued)

4. Click the **Accept** button.

![Data Summary](image)

**Exercise Steps (Accepting Notes on Individual Abstracts)**

1. From the **Workflow** menu, select **Basket View** or **Group View** from the list of [Vehicle Tax Queues].

2. Select the **NOTES** radio button, and then click the **Refresh** button.

![Vehicle Queue Filter](image)

Abstracts in the NOTES queue display in the Data Summary section.

3. Click the checkbox beside the abstract you want to work, and then click the **Edit** button.

4. Select the **Accept** radio button under Notes.

![Add Note](image)
5. Scroll down to the bottom of the page and click the Submit button

The Basket View or Group View displays; the number for the NOTES queue decreases by one and the abstract has been cleared from the list.

**Change Note Status**

If you would prefer not to review the abstract’s note in next year’s queue, edit the note and change its status to Temporary. You will need to save the change to the note and then submit the abstract. You do not need to select the Accept radio button, although if you do not select the Accept radio button, then the abstract will not be cleared from the queue until the end of the month when billing occurs.

Temporary notes are marked with a [T].
Vehicle Valuation Process

During the DMV Upload, the vehicle information from each abstract is compared to a set of values maintained by the DOR. This process allows most vehicles to be assigned a value by DOR.

**Vehicle Match**

Make: ACUR  
Year: 1997  
Body Style: 4S-4 Door Sedan  
VIN: JH4DB7656VS003146

**Valuation Process (TEC)**

Make: ACUR  
Year: 1997  
Body Style: 4S-4 Door Sedan  
VIN: JH4DB7656VS003146

$2500

2013 DOR Value: 2210  
2012 DOR Value: 2500  
2011 DOR Value: 2820
Vehicle Valuation Process (continued)

No Vehicle Match

If the vehicle cannot be matched during the Valuation Process, the value on the abstract is set to 0.

When no match is found, you can manually enter a value for the record. If you do not enter a value, at the end of the month the billing process will apply the DOR value by default.

If a value is not found for a vehicle, a default value is provided and displayed as the “DOR Recommended Default Value” on the abstract.
Processing Abstracts from the NO_VALUE Queue

When a value cannot be matched to a vehicle, the abstract is assigned to the NO_VALUE Queue. Abstracts in this queue have no amount in the value field.

Vehicles that qualify as a recreational vehicle with no value will be assigned to the RV Queue. Vehicles with a body style of trailer or utility vehicle and no value will populate in the TRAILER Queue. For all three of these queues, if no value is entered, it will process at the end of the month with the median value provided from DOR.

There is an abstract in your No Value queue because, during the vehicle valuation process, a value could not be determined for this vehicle. Through other resources, you are able to determine the value of the vehicle. Enter the value for the vehicle and clear the abstract from the queue.

Exercise Steps

1. From the Workflow menu, select Basket View or Group View from the list of [Vehicle Tax Queues].

2. Select the NO_VALUE radio button, and then click the Refresh button.

Abstracts in the NO_VALUE queue display in the Data Summary section.

3. Click the checkbox beside the abstract you want to work, and then click the Edit button.

The abstract information displays in a pop-up window.
Processing Abstracts from the NO_VALUE Queue (continued)

4. Type the value of the vehicle in the **Value** field **OR**

5. Type the **Acquisition Year** and **Acquisition Cost**, and then select the **Depreciation Schedule** **OR**

6. Select **Pct** or **Val**, then enter the starting **Value** and **Override** amount and type, and then select the **Override Status**.

7. Scroll down to the bottom of the page and click the **Calculate Value** button to verify that the correct Total Assessed Value will be saved to the abstract.
Processing Abstracts from the NO.VALUE Queue (continued)

8. Scroll down to the bottom of the page and click the **Submit** button.

The Basket View or Group View displays; the number for the NO.VALUE queue decreases by one and the abstract has been cleared from the list.
Processing Abstracts from the TRAILER Queue

Abstracts for trailers that cannot be assigned a value during the DMV Upload appear in the TRAILER queue. These abstracts may be processed in the same manner as the abstracts in the NO_VALUE queue. Another option is to manually assign a value and set the depreciation schedule for these abstracts.

Exercise Steps

1. From the Workflow menu, select Basket View or Group View from the list of [Vehicle Tax Queues].
2. Select the TRAILER radio button, and then click the Refresh button.

Abstracts in the TRAILER queue display in the Data Summary section.

3. Click the checkbox beside the abstract you want to work, and then click the Edit button.

The abstract information displays in a pop-up window.
Processing Abstracts from the TRAILER Queue (continued)

4. Type the Acquisition Year and Acquisition Cost, and then select the Depreciation Schedule.

5. Click the Submit button at the top right of the page.

The changes are saved and the Final Value reflects the new taxable amount. The Basket View or Group View displays; the number for the TRAILER queue decreases by one and the abstract has been cleared from the list.
Processing Abstracts from the RV Queue

Abstracts for recreational vehicles that cannot be assigned a value during the DMV Upload appear in the RV queue. These abstracts may be processed in the same manner as the abstracts in the NO_VALUE queue. Another option is to manually assign a value and set the depreciation schedule for these abstracts.

Following the DMV Upload, there are a number of abstracts for RVs that could not be valued. You decide to manually assign a value and set a depreciation schedule for one of the abstracts.

Exercise Steps

1. From the Workflow menu, select Basket View or Group View from the list of [Vehicle Tax Queues].

2. Select the RV radio button, and then click the Refresh button.

Abstracts in the RV queue display in the Data Summary section.

3. Click the checkbox beside the abstract you want to work, and then click the Edit button.

The abstract information displays in a pop-up window.

You can use the Upload Report to view all camper trailers (CT) and house campers (HC).
Processing Abstracts from the RV Queue (continued)

4. Type the **Acquisition Year** and **Acquisition Cost**, and then select the **Depreciation Schedule**.

5. Click the **Submit** button at the top right of the page.

The changes are saved and the Final Value reflects the new taxable amount. The Basket View or Group View displays; the number for the RV queue decreases by one and the abstract has been cleared from the list.

If you need to research a value, you can use the NADA Recreation Vehicle Appraisal Guide.
Chapter 2: All Things Situs

The abstracts in your Default Address and County Transfer queues will require Situs validation. In this chapter, we will review and process the abstracts in these queues. In addition, we will use additional features of NCVTS to efficiently work these abstracts.

Objectives

- Situs process
- Review abstracts in the DEFAULT_ADDRESS queue
- Understand the Situs repository
- Add and update streets
- Find the next available county address ID number
- Add and update Situs addresses and aliases
- Process abstracts from the DEFAULT_ADDRESS queue
- Process abstracts in the COUNTY_TRANSFER queue
- Transfer an abstract to another county
- Process multiple abstracts at once
Module 3: Abstract Processing
Chapter 2: All Things Situs

Situs Process

START

Vehicle Location Address Present?

YES

Use Vehicle Location Address

DMV Address

Use Primary Lessee OR Owner's Residential Address

Match Found in Situs Repository?

YES

Use Situs Repository Address Match

NO

DMV Address Match for Prior Year DMV Address?

YES

Situs Address Assigned to Abstract

NO

Prior Year Configuration Set?

YES

Prior Year Situs Address Non-Default Address?

YES

Use Prior Year Situs Address

NO

Use Default Address

NO
Reviewing Abstracts

Part of working efficiently in NCVTS is reviewing the work you have in advance to see if any records may be processed together. In most cases, the abstracts that can be worked together appear in the DEFAULT_ADDRESS queue.

When reviewing abstracts in the DEFAULT_ADDRESS queue, look for the following:

- Abstracts from a single county that can be transferred together to another county
- Abstracts that share the same owner to which you can assign the same Situs address
- Abstracts that share the same Situs address (may not be the same mailing address, but keep in mind Situs determines tax district)
- Abstracts that require you to add addresses to your Situs repository
Understand the Situs Repository

Before going live on NCVTS, each county provided a list of physical addresses to the NCVTS vendor who loaded them into the system. This list is known as the Situs repository. When the DMV Upload runs on the last Saturday of the month, the addresses sent by the DMV are compared to the addresses in your Situs repository in NCVTS. The more current the Situs repository is kept, the more accurate your taxation will be. The Situs repository will find more matches with the DMV and decrease the amount of work the county will have to do to process the DEFAULT_ADDRESS queue.

Two Main Components of an Address in NCVTS

An address in your Situs repository consists of two main parts:

1. The Street Name and Street Type. This must exist first in the Street Dictionary before the addresses for the street can be added to the Situs Repository.

2. The Situs Address. Using the Street Name from the Street Dictionary, the Street Address includes the street number or number range, any prefixes and suffixes, the street name, the city, the zip code, and associated tax districts. Each address is effective dated, meaning that an address is valid as of a starting date through a set end date.

Each county will determine whether they use address ranges or exactly match the DMV addresses with entries in their Situs repository. Whether a county uses exact matches or not, when an address is validated on an abstract, the Situs address on the abstract will now be associated to the DMV address it was validated against.
Adding and Updating Streets

Every Situs address in your county’s Situs repository is based on a Street Name. If the Street Name does not exist in NCVTS, you must add it to the Street Dictionary before you can add the individual addresses.

Adding a Situs Address for a Highway

When adding a situs address for a highway, use a street type of HWY or add highway to the street name field and leave the street type blank. For example, U.S. Highway 421 could be entered as follows:

Exercise Steps

1. From the Admin menu, select Maintain Street Dictionary.
Adding and Updating Streets (continued)

2. Type the name in the **Street Name** field, and then click the **Search** button.

   ![Image of search interface]

   The Street Name is not found.

3. After confirming the Street Name does not exist already, click the **Create New** button.

   Fields allowing you to add the Prefix, Suffix, and Street Type display.

4. Select values to define the street.

   ![Image of street definition interface]

5. Click the **Submit** button.

   The record is added to your Street Dictionary.

6. Click the **Edit** link.

   ![Image of street dictionary interface]

7. Change the street as desired, and then click the **Submit** button.

   The record is modified in your Street Dictionary.

---

If you have added an abstract to your service cart that needs address validation, you have a running list of addresses that you need to add to your Street Dictionary and/or Situs Repository.
Finding the Next Available County Address ID Number

Every Situs address street number or range will need a unique County Address ID Number. Follow the steps below to find the last county address ID number used.

**Exercise Steps**

1. From the NCVTS menu, select Situs Address.

2. Enter in two "**" symbols into the Street Name search field.

3. Click the Search button.

4. Click the County Address ID header twice to sort in descending order.

The County Address ID number at the top of the list is the last County Address ID used. When creating a new address, the last County Address ID used should be increased by “1”.

Last County Address ID used, County Address ID 18336 should be used for the next County Address ID
Adding and Updating Situs Addresses

One method of maintaining your Situs repository is to manually add addresses to NCVTS. Whether a new street was added in your county or you realized that you missed one that has come through on an abstract during the DMV Upload, you can add them to NCVTS if you have the necessary permissions.

Each county has their own set of County Address IDs. If you do not know the correct County Address ID for a new address, contact the person in your county who is responsible for creating and maintaining these IDs. Do NOT make up a County Address ID number.

**Exercise Steps**

1. From the **Admin** menu, select **Add Situs Address**.
2. Type and select values to define a new street address in NCVTS. Be sure to type the exact street name, including suffix, prefix, and type, as it appears in your Street Dictionary.
3. Click on the names of the tax districts that should be associated with the address. The address start date must be before the abstract is created.

To select multiple tax districts, press and hold the Ctrl key and then click each district you want to associate to the address.
Adding and Updating Situs Addresses (continued)

4. Click the **Submit** button.

   The new address is added to your Situs repository.

5. Click the **Search** link in the upper right of NCVTS.

   The Search page displays.

6. Click the **Situs Address** tab, and then type in the **Street Name**.

   ![Image of Situs Address tab]

7. Click the **Search** button.

   The Address displays.
Module 3: Abstract Processing
Chapter 2: All Things Situs

Adding Aliases for Situs Addresses

There are cases where an address is known by multiple names or multiple spellings. In these situations, you can create an alias that is associated with the Situs address.

When you create an alias, you are basically associating a new Situs address, minus tax jurisdictions, with an existing Situs address. After an alias is created, it can be selected and validated on an existing abstract. It is also included in the DMV Upload process and would allow an alternate spelling or naming of a street address to be matched. In other words, creating aliases will further reduce the number of abstracts appearing in the DEFAULT_ADDRESS queue each month.

Exercise Steps

1. Click the Search link in the upper right of NCVTS.

   The Search page displays.

2. Click the Situs Address tab, and then type in the Street Name of the street for which you need to create an alias.

3. Click the Search button.

4. From the Situs Address search results, click the value in the St # column.

<table>
<thead>
<tr>
<th>Street Address</th>
<th>St #</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>10220</td>
<td>101-519 E</td>
<td>MAIN</td>
</tr>
<tr>
<td>10212</td>
<td>101-519 E</td>
<td>MAIN</td>
</tr>
</tbody>
</table>

The Add/Edit Address page displays.
Adding Aliases for Situs Addresses (continued)

5. On the Add/Edit Address page, enter the name of the alias address you want to create and click the **Create Alias** button.

![Image of Address Page]

6. Click the **Submit** button.

The alias is created.
Module 3: Abstract Processing
Chapter 2: All Things Situs

Processing Abstracts from the DEFAULT_ADDRESS Queue

When an abstract listing record has a physical address that cannot be matched to an address in your county’s Situs repository, the abstract listing is assigned to the DEFAULT_ADDRESS queue. Abstract listings in this queue are assigned a generic address, called a default address. To ensure that taxes can be calculated or collected for the physical address, someone must update the address on these listings with an address that matches the correct tax district.

Abstract appears in DEFAULT_ADDRESS Queue

The abstracts that have an address that could not be matched with the one from the DMV upload are waiting in the DEFAULT_ADDRESS queue. You need to process these abstracts by selecting a valid address from your Situs Repository.

Exercise Steps

1. From the Workflow menu, select Basket View or Group View from the list of [Vehicle Tax Queues].

2. Select the DEFAULT_ADDRESS radio button, and then click the Refresh button.

Abstracts in the DEFAULT_ADDRESS queue display in the Data Summary section.
Processing Abstracts from the DEFAULT_ADDRESS Queue (continued)

3. Click the checkbox beside the abstract you want to work, and then click the **Edit** button.

   ![Data Summary Table](image)

   The address information displays in a pop-up window.

4. Click the **Copy Address** button to populate the address fields with the address provided by the DMV. Modify the address as needed.

   ![Copy Address Button](image)

5. Click the **Validate Address** button.

   A pop-up window with matching streets displays.

6. Click the **Select** radio button for the correct address from your Situs Repository.

   ![Select Radio Button](image)
7. Click the Submit button in the search window

The search window closes and the selected address displays in the fields

8. Click the Submit button at the bottom of the pop-up window.

The Basket View or Group View displays; the number for the DEFAULT_ADDRESS queue decreases by one and the abstract has been cleared from the list.
Processing Abstracts in the COUNTY_TRANSFER Queue

An abstract can be moved from one county to a different county by using the County Transfer functionality. The user selects the county to which they wish to transfer the abstract. The abstract is removed from the source county and sent to the target county with the active default address. County Transfer can only be used for unbilled abstracts.

County A receives an abstract showing the vehicle located in County B. County B transferred the abstract to County A and County A needs to accept it.

Exercise Steps

1. From the Workflow menu, select Basket View or Group View from the list of [Vehicle Tax Queues].

2. Select the COUNTY_TRANSFER radio button, and then click the Refresh button.

Abstracts in the COUNTY_TRANSFER queue display in the Data Summary section.

3. Click the checkbox beside the abstract you want to work, and then click the Edit button.

4. Clear the address, and then type the name of the street in the St. Name field.

5. Click the Validate Address button.

   The list of matching addresses displays.

6. Select the correct address and click the Submit button.

   The address is validated.
Processing Abstracts from the COUNTY_TRANSFER Queue (continued)

7. Select the **Accept** radio button, and then click the **Submit** button.

The Basket View or Group View displays; the number for the COUNTY_TRANSFER queue decreases by one and the abstract has been cleared from the list.
Transferring an Abstract to another County

When an abstract comes in to your county from the DMV Upload process but belongs to a different county, you have the ability to transfer (move) it to the correct county. You can only transfer abstracts before they are billed.

An abstract in the DEFAULT_ADDRESS queue should actually be in a different county. Using the Move To option on the abstract, you transfer the vehicle to Pitt county.

**Exercise Steps**

1. From the Workflow menu, select **Basket View** or **Group View** from the list of [Vehicle Tax Queues].

2. Select the **DEFAULT_ADDRESS** radio button, and then click the **Refresh** button.

Abstracts in the DEFAULT_ADDRESS queue display in the Data Summary section.

3. Click the checkbox for the record or records you want to transfer.
Transferring an Abstract to another County (continued)

4. Select the desired county from the drop-down list, and then click the **Move To** button.

   ![Image of Data Summary](image)

   **If the Move To Button and County List are not Available**

   Only pre-billed abstracts in a status of Received can be moved to another county. If you need to move an abstract and it is not in a Received status, you must put the abstract in the correct status by following these steps:

1. Open the abstract record.
2. Click the **Make Not RFB** button.
3. Change the status to **Received**.
4. Click the **Submit** button.

   The abstract is now in a Received status and the transfer functionality is available.

   ![Informational Note](image) You can transfer multiple records to the same county at one time. Select the checkbox for all records you want to move, and then use the transfer functionality. You can also transfer a vehicle from the Abstract Detail page.
Processing Multiple Abstracts

Reviewing abstracts allows you to work more efficiently. As you review abstracts in the DEFAULT_ADDRESS queue, consider if a new address must be added to your repository or if an abstract should be transferred to another county.

Multiple abstracts may be worked at the same time under specific conditions. For example, you can accept the Antique status for many abstracts in the ANTIQUE queue without restrictions. Other queues, such as the NO_VALUE queue, require that abstracts share the same Make, Model, Model Year and Body Style to be worked together. If you attempt to work multiple abstracts in a single queue that do not share these criteria, you will receive the following message:

![Message from webpage]

A group of abstracts is in the DEFAULT_ADDRESS queue that all belong to the same owner. To save time, you decide to work these abstracts together.

Exercise Steps

1. From the Workflow menu, select Basket View or Group View from the list of [Vehicle Tax Queues]

2. Select the DEFAULT_ADDRESS radio button, and then click the Refresh button.

   Abstracts in the DEFAULT_ADDRESS queue display in the Data Summary section.

3. In the Data Summary section, click the Owner column heading.

   The abstracts are sorted by owner.
Processing Multiple Abstracts (continued)

4. Scroll down until you find a group of abstracts with the same owner.

5. Select checkboxes for all records that have the same owner and DMV Situs Address

<table>
<thead>
<tr>
<th>Abstract #</th>
<th>Tax District</th>
<th>DMV Situs Address</th>
<th>DMV City State</th>
<th>DMV Zip</th>
</tr>
</thead>
<tbody>
<tr>
<td>0049019946</td>
<td>GUILFORD,GREENSBORO</td>
<td>113 GREENHAVEN DR</td>
<td>ARCHDALE NC</td>
<td>27263-7945</td>
</tr>
<tr>
<td>0049019273</td>
<td>GUILFORD,GREENSBORO</td>
<td>4035 MONNEIL RD</td>
<td>CLIMAX NC</td>
<td>27223-8211</td>
</tr>
<tr>
<td>0249018346</td>
<td>GUILFORD,GREENSBORO</td>
<td>608 EAGLE RD APT 3F</td>
<td>GREENSBORO NC</td>
<td>27407-3335</td>
</tr>
<tr>
<td>0045007716</td>
<td>GUILFORD,GREENSBORO</td>
<td>1724 NC HIGHWAY 82 W</td>
<td>HIGH POINT NC</td>
<td>27263-9416</td>
</tr>
<tr>
<td>0041948718</td>
<td>GUILFORD,GREENSBORO</td>
<td>1724 NC HIGHWAY 82 W</td>
<td>HIGH POINT NC</td>
<td>27263-9416</td>
</tr>
<tr>
<td>0049011510</td>
<td>GUILFORD,GREENSBORO</td>
<td>5511 BLANDWOOD DR</td>
<td>HIGH POINT NC</td>
<td>27260-8001</td>
</tr>
<tr>
<td>0049011327</td>
<td>GUILFORD,GREENSBORO</td>
<td>5511 BLANDWOOD DR</td>
<td>HIGH POINT NC</td>
<td>27260-8001</td>
</tr>
<tr>
<td>0049011455</td>
<td>GUILFORD,GREENSBORO</td>
<td>5511 BLANDWOOD DR</td>
<td>HIGH POINT NC</td>
<td>27260-8001</td>
</tr>
</tbody>
</table>

6. Click the **Edit** button at the top of the Data Summary section.

   The pop-up window for address validation displays.

7. Click the **Clear** button at the top of the page.

   The default address is cleared.

8. Type the name of the street in the **St. Name** field.

9. Click the **Validate Address** button.

   The matching addresses from your Situs Repository display in a pop-up window.
Processing Multiple Abstracts (continued)

10. Select the radio button for the desired address.

11. Click the Submit button, and then click the Submit button again.

The selected address is linked and the records are cleared from the DEFAULT_ADDRESS queue.
Module 4: Configuration and Maintenance

Chapter 1: Users and Roles
Chapter 1: Users and Roles

The Users and Roles chapter presents the concepts of user configuration, NCVTS roles and assigned rights, and provides hands-on practice in user and role creation and maintenance.

Objectives

- Understand user configuration
- Understand available user roles and assigned rights
- Search for and edit an existing user record
- Create a new user
- Create a new role
- View a role and its assigned rights
User Configuration

There are several steps to setting up a user in NCVTS.
1 - NCID
2- Create User ID
3- Assign Role

User Roles and Assigned Rights

There are six roles delivered with NCVTS. The role name and description are as follows:

<table>
<thead>
<tr>
<th>Role</th>
<th>Role Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>County admin role</td>
<td>This role will be responsible for adding county users, maintaining County configuration, Tax Schedules, Maintenance of Situs Address, etc.</td>
</tr>
<tr>
<td>Vehicle tax admin role</td>
<td>This role will be responsible for maintenance of Mass Assignment, View Manager Queue, Approve Adjustments, viewing and editing RMV abstracts and processing of queues.</td>
</tr>
<tr>
<td>Vehicle record edit role</td>
<td>This role will be responsible for maintenance of registered motor vehicle abstracts and processing of queues.</td>
</tr>
<tr>
<td>Proration edit role</td>
<td>This role will be responsible for prorating bills.</td>
</tr>
<tr>
<td>Refund edit role</td>
<td>This role will be responsible for authorizing and maintaining refunds in authorization queues.</td>
</tr>
<tr>
<td>Search and view role</td>
<td>This role will be responsible for performing searches and viewing abstracts and bills.</td>
</tr>
<tr>
<td>County transfer role</td>
<td>This role will be responsible for transferring vehicle abstracts to the appropriate county when the Situs address falls outside of the user’s county.</td>
</tr>
</tbody>
</table>
Searching for and Editing an Existing User Record

1. From the Admin menu, select User Management then Search User

2. Enter the name of the user provided to you:

3. Click the Search button.

4. The User Search Results displays.

5. Click the Username link.
Searching for and Editing an Existing User Record (continued)

6. The Edit User page displays.

7. Click the **S-Refund edit role** Assigned Role.

8. Click the left arrow to remove the role from the user’s assigned role.

9. Click the **Submit** button.

10. The Search User page displays.
Creating a New User
INSTRUCTOR DEMO ONLY

1. From the Admin menu, select User Management then Add User.

2. Enter your assigned NCID in the Username field.

3. Click the Validate NCID button.

4. Select the following roles (Hold CTRL key and click to select multiple), then click the right arrow to add them to the Assigned Roles.
Creating a New User (continued)
INSTRUCTOR DEMO ONLY

5. Click the **Submit** button.
Searching for and Viewing an Existing Role

1. From the Admin menu, select User Management then Search Role.

2. Select Vehicle record edit role from the Name drop-down list.

The search results display.

3. Click the Vehicle record edit role link.

The Edit Role page displays showing the Assigned Rights for the role.
Create a Role

1. From the Admin menu, select User Management then Add Role.
2. Enter a role name in the Name field.
3. Select a set of available rights you would like to assign to the role and click the right arrow.
4. Click the Submit button.

Your role has been created.
Chapter 2: System Maintenance

The System Maintenance chapter provides demonstrations as well as hands-on practice in setting up and maintaining a number of administrative tables and functions in NCVTS.

Objectives

- Create an assignment rule for Mass Assignment
- Maintain tax rates
- Insert new tax rates
- Maintain vehicle fees
- Copy a tax schedule
- Create Governing Board Meeting Dates for refunds
- View the high mileage schedule
- View the Depreciation Schedule
- Upload Situs file
- Download Situs file
- View and reassign logs
Creating an Assignment Rule for Mass Assignment

INSTRUCTOR DEMONSTRATION ONLY

A Mass Assignment Rule is a way of automatically assigning abstracts in particular queues to one or more users. While you can assign and reassign abstracts in queues to users, creating one or more Mass Assignment Rules allows you to quickly assign abstracts during the DMV Upload process.

When you create a Mass Assignment Rule, you select which queue or queues the rule applies to, which users should be assigned abstracts in those queues, and the percentage of abstracts assigned to each user. For example, maybe you want one person in your County office to handle all abstracts in the RV and Trailer queues. You can set up a Mass Assignment Rule that says 100% of the abstracts in those queues are assigned to that person. For all other queues, you want the work split 50/50 (or 60/40 and so on) between two users. You would create a second Mass Assignment Rule for all of the remaining queues with the work split between those two people.

Exercise Steps

1. From the Admin menu, select the Mass Assignment option.

The Mass Assignment page displays.
Creating an Assignment Rule for Mass Assignment (continued)

INSTRUCTOR DEMONSTRATION ONLY

2. Under Select Queues, click the name(s) of the queue(s) for which you want a mass assignment rule.

![Select Queues Screenshot]

3. Click the Select Queue button.

The queues are selected and steps to select users display.

4. Click the name(s) of the user(s) to be assigned abstracts during the DMV Upload, and then click the right >> arrows to move the users to the Set Order step.

![Select Users Screenshot]

The users are added to the Set Order step.

If you want to select multiple queues or users, press and hold the Ctrl key and then click each item in the list.
Creating an Assignment Rule for Mass Assignment (continued)

INSTRUCTOR DEMONSTRATION ONLY

5. If desired, highlight a user and click the up ^ or down v arrows to change their position in the list of users.

6. Click the Select User button to add the users to the Mass Assignment Rule.

The users are selected and step 4 of the assignment rule process displays.

7. In the % fields, type the percent of the total number of abstracts that each user will be assigned following a DMV Upload.

8. Click the Add Assignment Rule button.

The new assignment rule is created and appears in the Assignment Rules list at the top of the page.
Tax Rates and Fees for a New Year

Each county’s current and prior tax schedules already exist in NCVTS when you begin using the system. When your county’s new fiscal year’s tax schedule is determined, you will need to set up the new taxes and fees for each district on the Tax Schedule page in NCVTS.

**Tax Schedule Page**

The Tax Schedule page serves many purposes in setting up and maintaining schedules each year. From this page, you can:

- Search for tax schedule entries for a specific tax year
- Add new rates or fees for a district to a tax year
- Copy any or all of a prior tax schedule to create/add to the schedule for the new fiscal year
- Edit existing fees and tax percentages for a tax district

NCVTS has been updated to not allow counties to update or maintain tax rates after July 1. Please contact DOR if you need assistance through the customer portal or by emailing ncvts@ncdor.gov.
Searching for Existing Tax Schedule Entries
INSTRUCTOR DEMONSTRATION ONLY

The Tax Schedule page includes search functionality that allows you to pull up any existing tax schedule entry for your county.

Search functionality is an important part of creating new tax schedules. If you desire to copy all or a portion of an existing tax schedule to create entries for another year, you first need to search for the information you want to copy. If you need to edit existing entries, you would also use the search functionality first to locate them.

Exercise Steps

1. From the Admin menu, select Tax Schedule.

The Tax Schedule page displays.

2. In the Search Tax Schedule section, select the desired Tax Rate Year, Tax District, and Rate Type.

The entries matching your search appear in the Results section at the bottom of the page.

3. Click the Search button.

You may leave the Tax District and/or Rate Type fields blank when performing a search. If you leave the Tax District field blank, you will pull information for all Tax Districts.
Copying Existing Tax Schedule Entries to Create New Entries
INSTRUCTOR DEMO ONLY

The Copy Forward button on the Tax Schedule page allows you to create a copy of the current search results from a tax schedule and add them to another schedule. If the entry already exists in a tax year, you cannot add it again. In that case, you would search for and edit the record.

![Diagram of Copy Forward process]

- **Search Tax Schedule**
- **Copy Forward Search Results**
- **Edit Tax District and Rates/Fees (if needed)**
- **District and Fee Already Exist?**
- **Row(s) Added to New Tax Schedule**
- **Edits required?**
- **Tax Schedule Complete?**
Editing Existing Tax Schedule Entries
INSTRUCTOR DEMONSTRATION ONLY

Once a tax schedule entry is copied into a tax schedule, you can edit the information as needed. To edit an existing tax schedule entry, you search for the existing entry and use the Edit button to modify the information.

Exercise Steps

1. From the Admin menu, select Tax Schedule.

2. From the Search Tax Schedule page, select the tax district you need to edit and click Search.

   ![Search Tax Schedule](image)

   The tax schedule entries matching your search display.

3. Click the Edit button for the entry you need to edit.

   ![Maintain Tax Schedule](image)

   The current tax values display in the Maintain Tax Schedule section.

4. Edit the values as desired, and then click the Submit button.
Adding New Tax Schedule Entries
INSTRUCTOR DEMONSTRATION ONLY

The other option of adding a new entry to a tax schedule is manually through the Add New button. When you click this button, you are presented with fields that allow you to select the Tax Rate Year, Tax District, Rate Type, Rate Flag (Percentage for taxes or flat for fees), and Rate. When you click the Submit button, the new entry is added to the Tax Schedule for the year you specified.

Exercise Steps

1. From the Admin menu, select Tax Schedule.

2. From the Tax Schedule page, click the Add New button in the Search Tax Schedule section.

3. Select the Tax Rate Year, Tax District, Rate Type, Rate Flag, and Rate.

4. Click the Submit button.

The new entry is added to the selected year’s tax schedule.
Creating Governing Board Meeting Dates for Refunds

When issuing refunds, all refunds due to adjustments must be associated with a date the governing board met to decide whether the refund will be approved. Board meeting dates must be added manually in NCVTS before they can be associated to a refund.

**Exercise Steps**

1. From the **Admin** menu, select **Manage Board Meeting Dates**.

   ![](image1.png)

   The Manage Board Meeting Dates page displays.

2. Click the calendar icon by the **Board Meeting Date** field to select a date, or type a date in the field.

   ![](image2.png)

3. Click the **Add** button.

   The board meeting date is added and is available for selection on pending refunds.
Viewing the High Mileage Schedule
INSTRUCTOR DEMONSTRATION ONLY

When a user enters a mileage value on an abstract and clicks the Calc HM button, NCVTS looks to the age of the vehicle and depreciates the value based on the entered mileage. This table of information is stored in NCVTS in the High Mileage Schedule and is editable by DOR.

Exercise Steps

1. From the Options menu, select High Mileage Schedule.

The High Mileage Schedule displays.

2. Type a number in the Vehicle Age field.

15,000 miles per year is considered average mileage. A vehicle must exceed this by 10,000 miles to receive a 10% adjustment. A 2% adjustment is then added for each additional 5,000 miles.
Viewing the High Mileage Schedule (continued)
INSTRUCTOR DEMONSTRATION ONLY

3. Click the Search button.

The vehicle mileage and depreciation factor for the selected vehicle age display.

4. Click a number at the bottom of the search results to move to the additional pages.
Viewing a Depreciation Schedule  
INSTRUCTOR DEMONSTRATION ONLY

Depreciation Schedules are now standardized in NCVTS. With appropriate permissions, you can view a Depreciation Schedule, but only users with State-level authority can edit them.

**Exercise Steps**

1. From the **NCVTS** menu, select **NCVTS Main Menu**.

2. From the **Admin** menu, select **Maintain Business Depreciation Schedule**.

3. Select the desired **Year For**, and then click the **View Schedule and Categories** button.
Viewing a Depreciation Schedule (continued)
INSTRUCTOR DEMONSTRATION ONLY

4. Select the radio button for the schedule you want to view, and then click **Edit Schedule**.

5. View the schedule, and click the **Cancel** button when finished.
Uploading a Situs File

INSTRUCTOR DEMONSTRATION ONLY

Rather than adding and modifying situs addresses one at a time manually, an alternate option is to perform a situs upload. When you upload a situs file, you are telling NCVTS which situs addresses you want to add to your situs repository and/or which existing addresses you want to retire.

After the upload runs, if any errors occurred during the process, you can view those errors through an on-screen log.

Exercise Steps

1. From the NCVTS menu, select Situs Address.

2. From the Admin menu, select Upload Situs Address.

Best Practice:
Perform a Situs Upload on the training environment first. Contact DOR when your file is ready.

For more information on how to build a situs file and on the situs file format, please refer to appendix C.

Additional documentation on situs files can also be found on the NCVTS Customer Portal/Solutions.
Uploading a Situs File (continued)

INSTRUCTOR DEMONSTRATION ONLY

3. Click the **Browse** button, navigate to the file, and select it. *(Note: File must be in .csv format and zipped to upload.)*

4. Click the **Upload** button.

---

Once you upload your situs file, it is recommended to review the NCVTS logs for errors. Refer to the Viewing and Reassigning log section for instructions on how to access and review these logs.
Downloading a Situs File
INSTRUCTOR DEMONSTRATION ONLY

You can download the current situs file being used in NCVTS in order to make changes and updates and upload at a later date.

Exercise Steps

1. From the NCVTS menu, select Situs Address.

2. From the Admin menu, select Download Situs Address.

3. Click the Download Situs File button.
Downloading a Situs File (continued)

INSTRUCTOR DEMONSTRATION ONLY

4. Follow prompts to either Open or Save the situs file.
Module 4: Configuration and Maintenance
Chapter 2: System Maintenance

Viewing and Reassigning Logs
INSTRUCTOR DEMO ONLY

When batch processes are run, events from the process are output to a log. These events include when a process began, when it ended, the number of records that were added or updated, and any errors that occurred. Each of these events is recorded as a separate log entry, assigned to the person who uploaded the processed file.

Exercise Steps

1. From the Workflow menu, select Reassign Log.

2. Enter or select the desired search criteria and click the Refresh button.

The logs display.
Viewing and Reassigning Logs (continued)
INSTRUCTOR DEMO ONLY

3. Select a checkbox to assign the log to a user, and then select the user in the **Reassign User** column.

4. Click the **Update** button. The log is reassigned.

NCVTS supervisors and administrators can use the logs to see if any errors were in the file and to correct the addresses that did not work.
MODULE 5:
NCVTS REPORTS
Chapter 1: NCVTS Reports Overview

The NCVTS Reports Overview Chapter describes how to access and run NCVTS reports. The chapter also provides information on standard NCVTS report parameters as well as viewing, exporting and printing reports.

Objectives

- Understand how to access NCVTS reports
- Understand standard NCVTS report parameters
- Understand how to run a report
- Understand how to navigate within the NCVTS reports viewer window
- Understand how to export a report
- Understand how to print a report
Overview of NCVTS Reports

NCVTS Reports provide key metrics and details based on registered motor vehicle data for North Carolina counties. Users can set unique parameters for each report to determine the range of data that will populate a particular report. Reports may be viewed directly through the NCVTS reports viewer or exported into another file format such as an excel spreadsheet, CSV file, or PDF.
Accessing NCVTS Reports

Exercise Steps

1. From the NCVTS menu, select the NCVTS Main Menu.

2. From the Admin menu, select the Reports option.

3. Select your report of choice from the Reports dropdown menu and click the Go button.

Report parameters for the report you selected will display.
**Standard NCVTS Report Parameters**

The following report parameters are available on the majority of NCVTS reports.

**Standard Parameters**

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Renewal Date Fiscal Year</td>
<td>Fiscal year in which vehicle tag was renewed and/or paid</td>
</tr>
<tr>
<td>Renewal Date Period</td>
<td>Monthly, quarterly or annual renewal period in which a vehicle tag was renewed</td>
</tr>
<tr>
<td>Start Transaction Date</td>
<td>Earliest date within a date range for which the most recent transaction (payment, reversal or refund) updated a bill</td>
</tr>
<tr>
<td>End Transaction Date</td>
<td>Latest date within a date range for which the most recent transaction (payment, reversal or refund) updated a bill</td>
</tr>
<tr>
<td>Abstract Year For</td>
<td>Effective tax rate year for abstract</td>
</tr>
<tr>
<td>Tax Districts/Jurisdictions</td>
<td>County tax districts/jurisdictions</td>
</tr>
<tr>
<td>Abstract Status</td>
<td>Status of abstract</td>
</tr>
<tr>
<td></td>
<td>Abstract status include:</td>
</tr>
<tr>
<td></td>
<td>▸ Adj Pending</td>
</tr>
<tr>
<td></td>
<td>▸ Billed</td>
</tr>
<tr>
<td></td>
<td>▸ Not Billable</td>
</tr>
<tr>
<td></td>
<td>▸ Not RFB</td>
</tr>
<tr>
<td></td>
<td>▸ Received</td>
</tr>
<tr>
<td></td>
<td>▸ RFB</td>
</tr>
<tr>
<td></td>
<td>▸ Voided</td>
</tr>
<tr>
<td>Bill Paid Status</td>
<td>Paid – Paid in Full</td>
</tr>
<tr>
<td></td>
<td>Unpaid – Balance on Bill</td>
</tr>
</tbody>
</table>
Run an NCVTS Report

Each NCVTS Report has unique parameters which must be set before a report is run. Users are required to select an option for each parameter that is available.

Exercise Steps

1. Click the dropdown arrow next to each given parameter of your report and select the most appropriate option(s).

2. Click the View Report button.

3. Your report will display based on the report parameters you set.
Navigating NCVTS Reports

After a user runs a report, the report details will display in the reports viewer window. Users can review report details, change report view settings, sort and filter reports, export reports and print reports from the Reports Viewer window.

**Exercise Steps**

1. Change the report view settings by selecting your zoom percentage from the report zoom dropdown.

2. Navigate to a different page on your report (if applicable) by clicking the navigation arrows in the report viewer pane.

3. Click the refresh icon to reset the information contained in your report. This will take you back to the first page of the report.
Navigating NCVTS Reports (continued)

4. Search by keyword within a report by entering your search criteria in the search bar on the report viewer pane.

5. Click the Find hyperlink.

6. If applicable, click the Next hyperlink to view additional keyword matches.
Exporting NCVTS Reports

NCVTS reports can be exported into the following file formats:

- CSV (comma delimited)
- Microsoft Excel
- PDF
- XML
- Microsoft Word
- MHTML (web archive)
- TIFF

**Exercise Steps**

1. Run report with desired parameters.

2. Click the disk icon and select the format of your choice.

3. Follow prompts to open or save report in new format.
Printing NCVTS Reports

NCVTS users can print report details directly from the NCVTS Reports Viewer window

**Exercise Steps**

1. Run your report with desired parameters.
2. Click the printer icon.
3. Click the Preview button on the print dialog screen to preview your report.
4. Preview report and when finished, click the **Close** button.

You can print a range of pages for your report if the entire report does not need to be printed.

If you are printing a particular page range it is recommended that you preview your report first before printing. The page range on the print preview screen may differ from the page range that displays on the Reports Viewer window.
Printing NCVTS Reports (continued)

5. Select the appropriate printer from the **Name: drop down menu** and click the **OK** button

6. Your report will begin printing on the printer you selected
Chapter 2: NCVTS Standard Reports

The NCVTS Standard Reports Chapter describes the purpose of various NCVTS reports and provides information regarding non-standard report parameters and available report fields.

**Objectives**

- Understand the purpose of Standard NCVTS reports
- Understand non-standard report parameters that are available for applicable Standard NCVTS reports
- Understand the information contained in report fields for each Standard NCVTS report
Default Bill Situs Report

**Purpose (Renewal Month)**

The NCVTS Default Situs Report identifies abstracts billed with default addresses based on renewal dates.

**Purpose (Transaction Date)**

The NCVTS Default Situs Report identifies abstracts billed with default addresses based on transaction dates.

**Report Fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bill Status</td>
<td>Describes whether bill is paid or unpaid</td>
</tr>
<tr>
<td>Renewal Type</td>
<td>Describes the type of renewal</td>
</tr>
<tr>
<td></td>
<td>► New Issuance</td>
</tr>
<tr>
<td></td>
<td>► Renewal</td>
</tr>
<tr>
<td></td>
<td>► LRP</td>
</tr>
<tr>
<td>Bill Amount</td>
<td>Original bill amount due</td>
</tr>
<tr>
<td>Last Payment Date</td>
<td>Last date a payment was made against a bill with a default situs address</td>
</tr>
<tr>
<td>Abstract Number</td>
<td>Abstract number</td>
</tr>
<tr>
<td>Situs Address</td>
<td>Default situs address shown on bill</td>
</tr>
<tr>
<td>VIN</td>
<td>Vehicle Identification Number for vehicle billed with default situs address</td>
</tr>
<tr>
<td>Plate Number</td>
<td>Plate number for vehicle billed with default situs address</td>
</tr>
<tr>
<td>Mailing Address</td>
<td>Vehicle owner mailing address</td>
</tr>
</tbody>
</table>
Exclusion Report

Purpose

The Exclusion Report lists all vehicles that are excluded from taxation in NCVTS based on plate category.

Non-Standard Report Parameters

<table>
<thead>
<tr>
<th>Non-Standard Report Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plate Issue Date Fiscal Year</td>
<td>Fiscal year the vehicle plate was issued</td>
</tr>
<tr>
<td>Plate Issue Date Time Period</td>
<td>Monthly, quarterly or annual time period the vehicle plate was issued</td>
</tr>
<tr>
<td>Exclusion Codes</td>
<td>Reason for exclusion – either a use code or plate category</td>
</tr>
<tr>
<td></td>
<td>e.g. (TLM, SHP, FAR3, UDR)</td>
</tr>
</tbody>
</table>

Report Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abstract #</td>
<td>Abstract number for vehicle with exclusion</td>
</tr>
<tr>
<td>Owner Name</td>
<td>Owner name for vehicle with exclusion</td>
</tr>
<tr>
<td>Situs Address</td>
<td>Situs address for vehicle with exclusion</td>
</tr>
<tr>
<td>Mailing Address</td>
<td>Owner mailing address for vehicle with exclusion</td>
</tr>
<tr>
<td>Description</td>
<td>Description of vehicle with exclusion</td>
</tr>
<tr>
<td>Sales Price</td>
<td>Sales price for vehicle with exclusion</td>
</tr>
<tr>
<td>Prior Year Value</td>
<td>Prior year value for vehicle with exclusion</td>
</tr>
<tr>
<td>County</td>
<td>County the vehicle with exclusion is located within</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------</td>
</tr>
<tr>
<td>VIN</td>
<td>Vehicle identification number for vehicle with exclusion</td>
</tr>
<tr>
<td>Plate Number Category</td>
<td>Plate number and category for vehicle with exclusion</td>
</tr>
<tr>
<td>Title Date</td>
<td>Date vehicle titled to owner</td>
</tr>
<tr>
<td>Use Code</td>
<td>Code used by DMV to identify vehicle</td>
</tr>
<tr>
<td>Unbilled Value</td>
<td>Exempt value or</td>
</tr>
<tr>
<td></td>
<td>Assessed Value – Appraised value</td>
</tr>
</tbody>
</table>
Exempt Report

Purpose

The Exempt Report lists all vehicles that are exempt from taxation. Exemptions may be either full or partial exemptions.

Non-Standard Report Parameters

<table>
<thead>
<tr>
<th>Non-Standard Report Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exempt Codes</td>
<td>Reason for exemption</td>
</tr>
<tr>
<td></td>
<td>e.g. (Religious-Owned, Military, Property Exempt)</td>
</tr>
</tbody>
</table>

Report Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abstract #</td>
<td>Abstract number for vehicle with exemption</td>
</tr>
<tr>
<td>Owner Name</td>
<td>Owner name for vehicle with exemption</td>
</tr>
<tr>
<td>Description</td>
<td>Description of vehicle with exemption</td>
</tr>
<tr>
<td>County</td>
<td>County the vehicle with exemption is located within</td>
</tr>
<tr>
<td>Plate Number</td>
<td>Plate number and category for vehicle with exemption</td>
</tr>
<tr>
<td>Exempt Code</td>
<td>Reason for exemption</td>
</tr>
<tr>
<td></td>
<td>e.g. (Religious-Owned, Military, Property Exempt)</td>
</tr>
<tr>
<td>Unbilled Value</td>
<td>Exempt value or Assessed Value – Appraised value</td>
</tr>
</tbody>
</table>
The Gap Billing report lists all vehicles that have had a new plate issued or have had a new sticker that changes the renewal cycle where one or more months of taxes have been omitted.

### Non-Standard Report Parameters

<table>
<thead>
<tr>
<th>Non-Standard Report Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which Gap Billing Case</td>
<td>Determines if report will pull data for renewals or new issuances</td>
</tr>
</tbody>
</table>

#### Renewal Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Renewal Fiscal Year</td>
<td>Current fiscal year renewed</td>
</tr>
<tr>
<td>Renewal Time Period</td>
<td>Monthly, quarterly or annual time period plate was renewed</td>
</tr>
</tbody>
</table>

#### New Issuance Parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issuance Date Fiscal Year</td>
<td>Current fiscal year issued</td>
</tr>
<tr>
<td>Issuance Date Time Period</td>
<td>Monthly, quarterly or annual time period the vehicle plate was issued</td>
</tr>
</tbody>
</table>

### Report Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abstract Number</td>
<td>Abstract number for vehicle that was “skipped”</td>
</tr>
<tr>
<td>VIN</td>
<td>Vehicle identification number for vehicle that was “skipped”</td>
</tr>
<tr>
<td>Vehicle Description</td>
<td>Description of vehicle that was “skipped”</td>
</tr>
<tr>
<td>Plate #</td>
<td>Plate number of vehicle that was “skipped”</td>
</tr>
<tr>
<td>Plate Valid Thru</td>
<td>Plate expiration date for vehicle that was “skipped”</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Owner Name</td>
<td>Owner name of vehicle that was “skipped”</td>
</tr>
<tr>
<td>Situs Address Fields</td>
<td>Includes situs information for the street address, city, state and zip code based on the current abstract</td>
</tr>
<tr>
<td>Mailing Address Fields</td>
<td>Includes owner mailing address information for the street address, city state and zip code based on the current abstract</td>
</tr>
<tr>
<td>Vehicle Value</td>
<td>The value of the motor vehicle is determined from the prior year’s abstract</td>
</tr>
<tr>
<td>Billed Amount</td>
<td>The original billed amount listed on older abstract which caused the gap</td>
</tr>
</tbody>
</table>
Tax Billing Detail Report

Purpose

The Tax Billing Detail Report provides information for specific county bills that match report parameters.

Report Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIN Num</td>
<td>Vehicle identification number for bill listed on report</td>
</tr>
<tr>
<td>Vehicle Information</td>
<td>Vehicle description for bill listed on report</td>
</tr>
<tr>
<td>Bill Number</td>
<td>NCVTS bill number for bill listed on report</td>
</tr>
<tr>
<td>Bill Due Date</td>
<td>Bill due date for bill listed on report</td>
</tr>
<tr>
<td>Taxpayer Name</td>
<td>Vehicle owner for bill listed on report</td>
</tr>
<tr>
<td>Taxpayer Address</td>
<td>Vehicle owner mailing address for bill listed on report</td>
</tr>
<tr>
<td>Jurisdiction</td>
<td>Applicable tax jurisdiction(s) for bill listed on report</td>
</tr>
<tr>
<td>Levy Type</td>
<td>Applicable bill levy types listed on report</td>
</tr>
<tr>
<td></td>
<td>- Tax</td>
</tr>
<tr>
<td></td>
<td>- Vehicle Fee</td>
</tr>
<tr>
<td>Taxes</td>
<td>Amount of Tax or Vehicle fee for bill listed on report</td>
</tr>
</tbody>
</table>
Tax Billing Summary Report

**Purpose**

The Tax Billing Summary Report may be used to project the following:

- Number of Vehicles
- Assessed Values
- Taxes and Vehicle Fees

**Report Fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year For</td>
<td>Effective tax rate year for billed abstract</td>
</tr>
<tr>
<td>Jurisdiction</td>
<td>Tax jurisdiction</td>
</tr>
<tr>
<td># of Bills</td>
<td>Total number of bills per jurisdiction</td>
</tr>
<tr>
<td>Appraised Value</td>
<td>Summary of total appraised value for all vehicles within a given jurisdiction</td>
</tr>
<tr>
<td>Exempt Value</td>
<td>Summary of total exempt value for all vehicles within a given jurisdiction</td>
</tr>
<tr>
<td># of Vehicles with Vehicle Fee</td>
<td>Summary of the total number of vehicles assessed with a vehicle fee</td>
</tr>
<tr>
<td>Assessed Value</td>
<td>Summary of the total assessed value of all vehicles within a given jurisdiction</td>
</tr>
<tr>
<td></td>
<td>Assessed Value = Appraised Value – Exempt Value</td>
</tr>
<tr>
<td>Property Tax</td>
<td>Summary of the total amount of property tax (excluding vehicle fees) within a given jurisdiction</td>
</tr>
<tr>
<td>Vehicle Fee</td>
<td>Summary of the total value of vehicle fees within a given jurisdiction</td>
</tr>
<tr>
<td>Total Tax</td>
<td>Summary of the total amount of vehicle tax, including vehicle fees within a given jurisdiction</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>-------------------------------------------------------</td>
</tr>
<tr>
<td>Total Tax = Property Tax + Vehicle Fee</td>
<td></td>
</tr>
</tbody>
</table>
TR1 Vehicle Report

Purpose

The NCVTS TR1 Vehicle Report provides information for the following:

- Summary of vehicle bills by tax district
- Amounts paid by tax district
- Summary of total vehicle fees paid by tax district

Report Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jurisdiction</td>
<td>Applicable tax jurisdiction for bills on report</td>
</tr>
<tr>
<td>Total Bill Count</td>
<td>Number of bills by jurisdiction</td>
</tr>
<tr>
<td>Total Taxable Value</td>
<td>Summary of total taxable value of all vehicles within a given jurisdiction</td>
</tr>
<tr>
<td>Total Taxes Paid</td>
<td>Summary of the total amount of property tax paid within a given jurisdiction</td>
</tr>
<tr>
<td>Total Fees Paid</td>
<td>Summary of the total amount of vehicle fees paid within a given jurisdiction</td>
</tr>
</tbody>
</table>

Years Defined

- Year 1 = Requested year minus three
- Year 2 = Requested year minus two
- Year 3 = Requested year minus one
- Year 4 = Requested year
Vehicle Tax Collection Data Report

Purpose

The NCVTS Vehicle Tax Collection Data Report provides information for the following:

- Vehicle bill information
- Amounts paid and unpaid
- Summary of total taxes and amount paid by tax district

Report Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIN Num</td>
<td>Vehicle identification number for vehicle bill listed on report</td>
</tr>
<tr>
<td>Vehicle Information</td>
<td>Vehicle description for vehicle bill listed on report</td>
</tr>
<tr>
<td>Bill Number</td>
<td>Bill number for vehicle bill listed on report</td>
</tr>
<tr>
<td>Bill Due Date</td>
<td>Bill due date for vehicle bill listed on report</td>
</tr>
<tr>
<td>Taxpayer Name</td>
<td>Vehicle owner of vehicle bill listed on report</td>
</tr>
<tr>
<td>Taxpayer Address</td>
<td>Mailing address for vehicle owner listed on report</td>
</tr>
<tr>
<td>Tax Jurisdiction</td>
<td>Tax jurisdiction(s) for vehicle bill listed on report</td>
</tr>
<tr>
<td>Levy Type</td>
<td>Applicable levy type for vehicle bill listed on report</td>
</tr>
<tr>
<td></td>
<td>► Tax</td>
</tr>
<tr>
<td></td>
<td>► Vehicle Fee</td>
</tr>
<tr>
<td>Taxes</td>
<td>Total taxes due on bill per levy type for bill listed on report</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Amount Paid</td>
<td>Amount of tax paid on bill per levy type for bill listed on report</td>
</tr>
</tbody>
</table>
Upload Report

Purpose

The Upload Report is a monthly tax scroll and contains all the vehicles that should be renewed in the county. Abstracts shown on the report are run through different checks (edits) to see if they can be made RFB (ready for billing). Vehicle abstracts that do not pass all the edits are dropped into various queues to be worked. The report allows you to view and make changes to abstracts prior to billing. After billing changes are made through adjustments.

Report Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abstract Number</td>
<td>Vehicle Abstract Number</td>
</tr>
<tr>
<td>Abstract Status Type</td>
<td>Status of Abstract</td>
</tr>
<tr>
<td></td>
<td>Note: Abstracts that have a status of Received will be funneled into a queue</td>
</tr>
<tr>
<td>VIN Number</td>
<td>Vehicle Identification Number for vehicle</td>
</tr>
<tr>
<td>Title Number</td>
<td>Title Number for vehicle</td>
</tr>
<tr>
<td>Primary Taxpayer</td>
<td>Primary vehicle owner listed on abstract and bill</td>
</tr>
<tr>
<td>Secondary Taxpayer</td>
<td>Secondary vehicle owner listed on abstract</td>
</tr>
<tr>
<td>County Address ID</td>
<td>Unique situs address ID for vehicle</td>
</tr>
<tr>
<td>Parcel Number</td>
<td>Parcel number for situs address associated with vehicle</td>
</tr>
<tr>
<td>Situs Street Number or Range</td>
<td>Street Number or Street Range for vehicle abstract</td>
</tr>
<tr>
<td>Situs Parity</td>
<td>Used for street ranges:</td>
</tr>
<tr>
<td></td>
<td>▶ Even</td>
</tr>
<tr>
<td></td>
<td>▶ Odd</td>
</tr>
<tr>
<td></td>
<td>▶ Mixed</td>
</tr>
<tr>
<td></td>
<td>▶ Unknown</td>
</tr>
<tr>
<td>Situs Street Name</td>
<td>Situs address street name</td>
</tr>
<tr>
<td>City</td>
<td>Situs address city</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Situs State</td>
<td>Situs address state</td>
</tr>
<tr>
<td>Zip</td>
<td>Situs address zip code</td>
</tr>
<tr>
<td>County Tax District</td>
<td>County Tax District on vehicle abstract</td>
</tr>
<tr>
<td>City Tax District</td>
<td>Applicable city tax district on vehicle abstract</td>
</tr>
<tr>
<td>Fire Tax District</td>
<td>Applicable fire tax district on vehicle abstract</td>
</tr>
<tr>
<td>Other Tax District</td>
<td>Other/Special tax district on vehicle abstract</td>
</tr>
<tr>
<td>Notes</td>
<td>Notes flag to indicate whether or not the vehicle abstract contains notes</td>
</tr>
<tr>
<td></td>
<td>▶ Y- At least one note exists on abstract</td>
</tr>
<tr>
<td></td>
<td>▶ N- No notes on abstract</td>
</tr>
<tr>
<td>Final Value</td>
<td>Final vehicle value listed on abstract; value that will be billed</td>
</tr>
<tr>
<td>Value</td>
<td>Vehicle value listed on abstract</td>
</tr>
<tr>
<td>DOR Value</td>
<td>DOR recommended value for vehicle listed on abstract</td>
</tr>
<tr>
<td>Prior Year Value</td>
<td>Prior year value of the vehicle</td>
</tr>
<tr>
<td>RMV Sales Price</td>
<td>DMV sales price for vehicle listed on the abstract. Information comes from STARS.</td>
</tr>
<tr>
<td>Exempt Code Type</td>
<td>Applicable exempt code for vehicle listed on abstract, if the vehicle is exempt in part or in full from vehicle tax/fees</td>
</tr>
<tr>
<td>Body Style</td>
<td>Body style code of vehicle listed on abstract</td>
</tr>
<tr>
<td>Make</td>
<td>Vehicle make of vehicle listed on abstract</td>
</tr>
<tr>
<td>Model</td>
<td>Vehicle model of vehicle listed on abstract</td>
</tr>
<tr>
<td>Year</td>
<td>Vehicle year of vehicle listed on abstract</td>
</tr>
<tr>
<td>Vehicle Wt</td>
<td>Vehicle weight for vehicle listed on abstract</td>
</tr>
<tr>
<td>Current Plate Exp Date</td>
<td>Current plate expiration date for vehicle listed on abstract</td>
</tr>
<tr>
<td>Plate Number</td>
<td>Plate number for vehicle listed on abstract</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>Plate Code</td>
<td>Plate code for vehicle listed on abstract</td>
</tr>
<tr>
<td>Plate Ctgyn</td>
<td>Plate category for vehicle listed on abstract</td>
</tr>
</tbody>
</table>
Chapter 3: NCVTS Finance Reports

The NCVTS Finance Reports Chapter describes the purpose of NCVTS reports that are recommended for use by county finance staff to review, reconcile, and distribute county vehicle tax payments and refunds. This chapter provides information regarding non-standard report parameters and available report fields for each NCVTS Finance Report.

Objectives

- Understand the purpose of NCVTS Finance reports
- Understand non-standard report parameters that are available for applicable NCVTS Finance reports
- Understand the information contained in report fields for each NCVTS Finance report
County Reconciliation Report

Purpose

The County Reconciliation Report is to be used to return detailed county payment and reversal data in NCVTS to reconcile against distribution reports from STARS for a given date range.

Non-Standard Report Parameters

<table>
<thead>
<tr>
<th>Non-Standard Report Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Start Date</td>
<td>Used as the start date in the transaction date range.</td>
</tr>
<tr>
<td></td>
<td>Date last transaction occurred on abstract.</td>
</tr>
<tr>
<td>Transaction Through Date</td>
<td>Used as the end date in the transaction date range.</td>
</tr>
<tr>
<td></td>
<td>Date last transaction occurred on abstract.</td>
</tr>
</tbody>
</table>

Report Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year For</td>
<td>Effective tax rate year for billed abstract</td>
</tr>
<tr>
<td>Jurisdiction</td>
<td>Tax Jurisdiction using county financial import data</td>
</tr>
<tr>
<td>Vehicle Taxes</td>
<td>Payments where Levy_type = tax, excluding reversals and interest</td>
</tr>
<tr>
<td>Vehicle Fees</td>
<td>Payments where levy type = vehicle fee, excludes reversals and interest</td>
</tr>
<tr>
<td>Interest</td>
<td>All interest on vehicle fees and taxes, excluding reversals</td>
</tr>
<tr>
<td>Holds (+)</td>
<td>Funds not assigned (usually seen as an overpayment)</td>
</tr>
<tr>
<td>Total Payments</td>
<td>Sum of Taxes and Fees plus interest plus Holds_plus</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Reversed Taxes</td>
<td>Reversals of levy type taxes, excludes reversals of interest</td>
</tr>
<tr>
<td>Reversed Fees</td>
<td>Reversals of levy type vehicle fees excludes interest</td>
</tr>
<tr>
<td>Total Reversed Taxes and Fees</td>
<td>Sum of reversed vehicle fees and reversed vehicle taxes</td>
</tr>
<tr>
<td>Reversed Interest</td>
<td>All reversed interest</td>
</tr>
<tr>
<td>Holds (-)</td>
<td>Reversed holds (reversal of overpayment refunds)</td>
</tr>
<tr>
<td>Total Reversals</td>
<td>Sum of Total reversed taxes and fees plus reversed interest plus Holds_minus</td>
</tr>
<tr>
<td>Credit Card</td>
<td>Payments associated to a credit card – includes all taxes, fees, reversals, Holds Plus, Holds_minus and interest</td>
</tr>
<tr>
<td>Debit Card</td>
<td>Payments associated to a debit card – includes all taxes, fees, reversals, Holds Plus, Holds_minus and interest</td>
</tr>
</tbody>
</table>
Pending Refund Report

Purpose

The Pending Refund Report shows refund data prorated by tax district, levy type (vehicle fee or tax), and interest for a given time period.

Non-Standard Report Parameters

<table>
<thead>
<tr>
<th>Non-Standard Report Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year for Refund Date</td>
<td>Effective tax rate year for billed abstract that is associated with a refund</td>
</tr>
<tr>
<td>Refund Transaction Date</td>
<td>Most recent refund activity that occurred during the date range that is set</td>
</tr>
<tr>
<td>Refund Types</td>
<td>Reason for Refund</td>
</tr>
<tr>
<td></td>
<td>▶ Overpayment</td>
</tr>
<tr>
<td></td>
<td>▶ Adjustment &gt;=$100</td>
</tr>
<tr>
<td></td>
<td>▶ Adjustment &lt;=$100</td>
</tr>
<tr>
<td></td>
<td>▶ Proration</td>
</tr>
<tr>
<td>Refund Status</td>
<td>Status of Refund</td>
</tr>
<tr>
<td></td>
<td>▶ Authorized</td>
</tr>
<tr>
<td></td>
<td>▶ Pending</td>
</tr>
</tbody>
</table>

Report Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Name</td>
<td>Vehicle owner’s business name</td>
</tr>
<tr>
<td>First Name</td>
<td>Vehicle owner’s first name</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Vehicle owner’s middle name</td>
</tr>
<tr>
<td>Last Name</td>
<td>Vehicle owner’s last name + suffix</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-------------------------------------------------------</td>
</tr>
<tr>
<td>Address 1</td>
<td>Vehicle owner mailing address</td>
</tr>
<tr>
<td>Address 2</td>
<td>Additional line for vehicle owner mailing address</td>
</tr>
<tr>
<td>Address 3</td>
<td>City, State and Zip for vehicle owner mailing address</td>
</tr>
<tr>
<td>Refund Type</td>
<td>Type of Refunds</td>
</tr>
<tr>
<td></td>
<td>▶ Proration</td>
</tr>
<tr>
<td></td>
<td>▶ Adjustment</td>
</tr>
<tr>
<td>Bill #</td>
<td>Bill base number</td>
</tr>
<tr>
<td>Plate Number</td>
<td>License plate number</td>
</tr>
<tr>
<td>Status</td>
<td>Refund Status</td>
</tr>
<tr>
<td></td>
<td>▶ Pending</td>
</tr>
<tr>
<td></td>
<td>▶ Authorized</td>
</tr>
<tr>
<td>Transaction #</td>
<td>Refund Number</td>
</tr>
<tr>
<td>Refund Description</td>
<td>Generic description of refund</td>
</tr>
<tr>
<td>Refund Reason</td>
<td>Reason for refund</td>
</tr>
<tr>
<td>Create Date</td>
<td>Date Refund created</td>
</tr>
<tr>
<td>Authorization Date</td>
<td>Date Refund was authorized</td>
</tr>
<tr>
<td>Tax Jurisdiction</td>
<td>Relevant tax jurisdiction</td>
</tr>
<tr>
<td>Levy Type</td>
<td>Levy Type</td>
</tr>
<tr>
<td></td>
<td>▶ Tax</td>
</tr>
<tr>
<td></td>
<td>▶ Vehicle Fee</td>
</tr>
<tr>
<td>Change</td>
<td>Net change by tax district and levy type</td>
</tr>
<tr>
<td>Interest Change</td>
<td>Net change in interest by tax district and levy type</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td>Total</td>
<td>Sum of NetChange and NetChangeInterest by tax district and levy type</td>
</tr>
</tbody>
</table>

Vehicles could be in multiple tax districts, refer to the county jurisdiction for a true net value.
County Finance Report

Purpose

The County Finance Report provides information on financial data and is divided into four areas:

- **Billing information** - provides data for Levies and number of vehicles as well as LRP (Limited Registration Plates)
- **Collections** - shows amounts paid
- **Credit/Debit card cost allocation** - shows payment data made by Credit or Debit card
- **Total collected/uncollected** - shows data for amounts paid and unpaid

Non-Standard Report Parameters

<table>
<thead>
<tr>
<th>Non-Standard Report Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment Fiscal Year</td>
<td>Fiscal year vehicle bills were paid</td>
</tr>
<tr>
<td>Tax Districts</td>
<td>Tax Jurisdiction for which vehicle bills were paid</td>
</tr>
</tbody>
</table>

Report Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jurisdiction</td>
<td>Tax Jurisdiction</td>
</tr>
<tr>
<td>Nbr Vehicles</td>
<td>Count of number of vehicles that have been paid (or has LRP).</td>
</tr>
<tr>
<td>Renewal/LRP/Issue Net Values</td>
<td>Aggregated amount of the net value of vehicles in Tax district</td>
</tr>
<tr>
<td>Renew/Issue Levy (Tax)</td>
<td>Aggregated Taxes levied where payments were made</td>
</tr>
<tr>
<td>Renew/Issue Levy (VehicleFee)</td>
<td>Aggregated Vehicle Fees levied where payments were made</td>
</tr>
<tr>
<td>LRP Levy (Tax)</td>
<td>Tax Levies for LRP (may or may not have been paid)</td>
</tr>
<tr>
<td>LRP Levy (Vehicle Fee)</td>
<td>Vehicle Fee Levies for LRP (may or may not have been paid)</td>
</tr>
<tr>
<td>Gross Levy (Tax)</td>
<td>Total of Tax_Renewal_Issue_Levy and Tax_LRP_Levy</td>
</tr>
</tbody>
</table>

Vehicles could be in multiple tax districts, refer to the county jurisdiction for a true count.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross Levy (Vehicle Fee)</td>
<td>Total of Fee_Renewal_Issue_Levy and Fee_LRP_Levy</td>
</tr>
<tr>
<td>Renew/Issue Collections (Tax)</td>
<td>Aggregated amount collected attributable to Taxes</td>
</tr>
<tr>
<td>Renew/Issue Collections (Vehicle Fee)</td>
<td>Aggregated amount collected attributable to Vehicle Fees</td>
</tr>
<tr>
<td>LRP Collections (Tax)</td>
<td>Aggregated amount collected attributable to LRP taxes</td>
</tr>
<tr>
<td>LRP Collections (Vehicle Fee)</td>
<td>Aggregated amount collected attributable to LRP vehicle fees</td>
</tr>
<tr>
<td>Net Collections (Tax)</td>
<td>Total of Tax_Renewal_Issue_Collected and Tax_LRP_Collected</td>
</tr>
<tr>
<td>Net Collections (Vehicle Fee)</td>
<td>Total of Fee_Renewal_Issue_Collected and Fee_LRP_Collected</td>
</tr>
<tr>
<td>% Collected</td>
<td>( \frac{(Tax_Net_Collections + Fee_Net_Collections)}{(Tax_Gross_Levy + Fee_Gross_Levy)} ) for month and tax district</td>
</tr>
<tr>
<td>Billing Cost %</td>
<td>( \frac{(Tax_Net_Collections + Fee_Net_Collections)}{(sum\ of\ all (Tax_Net_Collections + Fee_Net_Collections)in\ all\ tax\ districts\ for\ the\ given\ month)} )</td>
</tr>
<tr>
<td>Total Collection by Credit Card</td>
<td>Amount collected by credit card payment</td>
</tr>
<tr>
<td>Credit Card %</td>
<td>Percent of Net collections that can be attributed to a credit card payment</td>
</tr>
<tr>
<td></td>
<td>Amt_Collected_Credit/ (Tax_Net_Collections+ Fee_Net_Collections)</td>
</tr>
<tr>
<td>Total Collection by Debit Card</td>
<td>Amount collected by debit card payment</td>
</tr>
<tr>
<td>Debit Card %</td>
<td>Percent of Net collections that can be attributed to a debit card payment</td>
</tr>
<tr>
<td></td>
<td>Amt_Collected_Debit / (Tax_Net_Collections+ Fee_Net_Collections)</td>
</tr>
<tr>
<td>Interest Collected</td>
<td>Amount collected attributable to interest</td>
</tr>
<tr>
<td>Total Net Collections</td>
<td>Interest_Collected + (Tax_Net_Collections+ Fee_Net_Collections)</td>
</tr>
<tr>
<td>LRP Uncollected</td>
<td>LRP that has not been paid</td>
</tr>
<tr>
<td>DMV Int Refund</td>
<td>Interest refunded by DMV</td>
</tr>
</tbody>
</table>
NET Distribution Report

Purpose

The NET Distribution Report provides a summary by levy type for the total amount collected, net amount collected (takes into account STARS and non-STARS refunds), and tracks refund information for each tax jurisdiction within a county. This report helps Finance staff accurately distribute vehicle tax monies to municipalities that the county collects for.

STARS transactions include payments and reversals made on vehicle bills from the STARS system. Non-STARS transactions originated in NCVTS due to county action.

The report pulls data based on a set of transaction date range parameters. These parameters look for payment and/or refund transactions that have occurred during the timeframe that is specified.

Non-Standard Report Parameters

<table>
<thead>
<tr>
<th>Non-Standard Report Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Date</td>
<td>This is the start date for the transaction date range parameters.</td>
</tr>
<tr>
<td>End Date</td>
<td>This is the end date for the transaction date range parameters.</td>
</tr>
</tbody>
</table>
| Batch Source                 | Payment batch source for refund  
                             | ▶ STARS  
                             | ▶ Non-STARS |

Report Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jurisdiction</td>
<td>Tax Jurisdiction</td>
</tr>
</tbody>
</table>
| Levy Type     | Levy Type for applicable transactions:  
                | ▶ TAX  
<pre><code>            | ▶ VEHICLE FEE |
</code></pre>
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>REFUND</td>
<td></td>
</tr>
<tr>
<td>Levy ($)</td>
<td>Levy value by type per jurisdiction</td>
</tr>
<tr>
<td>Interest ($)</td>
<td>Paid interest per jurisdiction</td>
</tr>
<tr>
<td>Net Adj ($)</td>
<td>Net value of adjustments that have resulted in either bill increases or decreases per jurisdiction</td>
</tr>
<tr>
<td>Net Adj Interest ($)</td>
<td>Net of interest that has been released or added after a bill adjustment</td>
</tr>
<tr>
<td>Other ($)</td>
<td>Value of other transaction types that have occurred during the date range specified</td>
</tr>
<tr>
<td>DMV Interest Refund ($)</td>
<td>Interest refunded by DMV</td>
</tr>
<tr>
<td>Net Levy ($)</td>
<td>Net Levy = Levy + Interest - Net Adj – Net Adj Interest + Other – DMV Interest Refunds ($)</td>
</tr>
</tbody>
</table>
APPENDICES
## Appendix A: NCVTS Terminology

Many of the words, terms, and acronyms used to describe the North Carolina Vehicle Tax System and related applications may not be familiar to you. This section is intended to give you a basic understanding of terminology used during the course and beyond.

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Abstract</strong></td>
<td>Each month, the Department of Motor Vehicles sends information to NCVTS about vehicles up for registration renewal. The information for a single vehicle is called an Abstract. A single vehicle will have a separate abstract every year. Alternate terminology: <strong>Listing</strong>, <strong>Record</strong>, <strong>Vehicle Record</strong></td>
</tr>
<tr>
<td><strong>Alias (Situs Address)</strong></td>
<td>When a street address has alternate names, such as a Rural Route number and a street name, all unofficial names are considered aliases. These aliases can be added to NCVTS so that they can be matched to a vehicle tax record for correct tax districts and rates.</td>
</tr>
<tr>
<td><strong>DMV Upload</strong></td>
<td>Each month, the Department of Motor Vehicles (DMV) sends the full list of vehicle records up for renewal to NCVTS. This monthly process is called the DMV Upload. Alternate terminology: <strong>Renewal tape</strong></td>
</tr>
<tr>
<td><strong>LPA (License Plate Agency)</strong></td>
<td>A contracted or county-run office that offers vehicle registration services and title transactions, as well as vehicle license plate renewals, replacement tags and duplicate registrations.</td>
</tr>
<tr>
<td><strong>LRP (Limited Registration Plate)</strong></td>
<td>A registration plate that allows property taxes to be deferred for 60 days. A limited registration plate will carry a sticker that expires at the end of the second full month if the vehicle’s property taxes are not paid in full. These plates are mainly issued by auto dealerships.</td>
</tr>
<tr>
<td><strong>Queue</strong></td>
<td>A set of records that share common information and require work and/or review by county personnel. For example, abstracts that include notes for review are accessible from a single “queue” called the NOTES queue.</td>
</tr>
<tr>
<td><strong>RFB (Ready for Bill)</strong></td>
<td>Abstracts that are sent from the DMV through the DMV Upload process that do not require additional review by anyone in your county are automatically marked with a status of RFB, or Ready for Bill.</td>
</tr>
<tr>
<td><strong>Situs Address</strong></td>
<td>The physical street address where a vehicle resides. The place where property is more-or-less permanently located. Corresponding STARS field: <strong>Vehicle Location</strong></td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Situs Repository</strong></td>
<td>The list of all physical (situs) addresses in a single county’s NCVTS system.</td>
</tr>
<tr>
<td><strong>STARS</strong></td>
<td>The NCDMV uses STARS (State Titling and Registration System) to track vehicle registration and renewals in North Carolina. There are many occasions where information is passed between STARS and NCVTS during the course of renewals, billing, and collections.</td>
</tr>
<tr>
<td><strong>Valuation Process</strong></td>
<td>When the DMV Upload occurs, NCVTS attempts to assign each vehicle a value. NCVTS uses the county, make, year, VIN, and body type to determine the value of a vehicle. Alternate terminology: <strong>TEC Data Systems, Inc.</strong></td>
</tr>
<tr>
<td><strong>VIN (Vehicle Id Number)</strong></td>
<td>A unique code that identifies a specific vehicle.</td>
</tr>
</tbody>
</table>
Appendix B: NCID Instructions

Instructions to Setup an NCID Tax Administration Division in Your County

1. Determine if your county has an NCID Tax Administration group (division) by accessing the following site:
   https://www.ncid.its.state.nc.us/NCID_County_gov_map.asp

2. If your county already has an NCID Tax Administration division setup, contact the NCID Division Administrator and request an NCID User account.

3. If your county has an NCID County Administrator, but does not have an NCID Tax Administration division, contact the NCID County Administrator to setup a Tax Administration division for your county. The NCID County Administrator will submit a request to ITS to establish the division. Once established, the NCID Division Administrators will be assigned and can issue your NCID User account.

4. If your county is not shown on the link above, proceed with step 5.

5. Go to the NCID site by accessing the following link: https://ncid.nc.gov/

6. Click on Register! in the bottom right corner of the login box.
Instructions to Setup an NCID Tax Administration Division in Your County (continued)

7. Click the button for **Local Government Employee**.

8. Click on **Send Email to NCID**.
Instructions to Setup an NCID Tax Administration Division in Your County (continued)

9. Complete the information on the request form as shown below and click Submit.
Appendix C: Situs File Layout/Data Elements

File format for uploading situs information into NCVTS. Counties are expected to submit master situs address data, alias data and one default physical address for their county. This information is the master address file for valid addresses and will be used during the load process for identifying valid tax districts. Counties have an option for submitting separate files for situs address data, alias data and one default physical address. These records are identified by record type in data collection file. This is “~” delimited file. Combination of County address ID and Effective date will be used as key for address update by this interface.

<table>
<thead>
<tr>
<th>Field Description</th>
<th>Data Type</th>
<th>Field Length</th>
<th>Required Conditional Optional</th>
<th>Notes</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>County Code</td>
<td>characters</td>
<td>5</td>
<td>R</td>
<td>First five characters of county</td>
<td>RANDO</td>
</tr>
<tr>
<td>Record type</td>
<td>characters</td>
<td>1</td>
<td>R</td>
<td>S for Situs A for Alias D for Default</td>
<td>S</td>
</tr>
<tr>
<td>County Address Id</td>
<td>numbers</td>
<td>10</td>
<td>R</td>
<td></td>
<td>12345</td>
</tr>
<tr>
<td>Street name</td>
<td>characters</td>
<td>30</td>
<td>R</td>
<td></td>
<td>Main</td>
</tr>
<tr>
<td>Street prefix</td>
<td>characters</td>
<td>10</td>
<td>C</td>
<td>Standard abbreviation (N,NW, W, SW, S, SE, E, NE)</td>
<td>N</td>
</tr>
<tr>
<td>Street suffix</td>
<td>characters</td>
<td>10</td>
<td>C</td>
<td>Standard abbreviation (N,NW, W, SW, S, SE, E, NE)</td>
<td>S</td>
</tr>
<tr>
<td>Street type</td>
<td>characters</td>
<td>20</td>
<td>O</td>
<td>Standard street type abbreviations are provided in this document.</td>
<td>ST</td>
</tr>
<tr>
<td>Street number</td>
<td>numbers</td>
<td>6</td>
<td>C</td>
<td>Street number will point to an address point. When street number is provided street range should not be present.</td>
<td>100</td>
</tr>
<tr>
<td>Street range from</td>
<td>numbers</td>
<td>6</td>
<td>C</td>
<td>Street range from and to will provide range of situs data. When street range is provided street number should not be present.</td>
<td>100</td>
</tr>
<tr>
<td>Street range to</td>
<td>numbers</td>
<td>6</td>
<td>C</td>
<td></td>
<td>200</td>
</tr>
<tr>
<td>Parity</td>
<td>characters</td>
<td>1</td>
<td>O</td>
<td>Valid values are E for Even O for Odd M for Mixed U for Unknown</td>
<td>E</td>
</tr>
<tr>
<td>Field Description</td>
<td>Data Type</td>
<td>Field Length</td>
<td>Required Conditional Optional</td>
<td>Notes</td>
<td>Examples</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------</td>
<td>--------------</td>
<td>-------------------------------</td>
<td>-------</td>
<td>---------</td>
</tr>
<tr>
<td>Parcel number</td>
<td>characters</td>
<td>20</td>
<td>O</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Street Misc.</td>
<td>characters</td>
<td>20</td>
<td>O</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>characters</td>
<td>35</td>
<td>O</td>
<td>This information should be same as provided in section 9 for tax districts.</td>
<td>Charlotte</td>
</tr>
<tr>
<td>State</td>
<td>characters</td>
<td>2</td>
<td>O</td>
<td></td>
<td>NC</td>
</tr>
<tr>
<td>Zip code</td>
<td>characters</td>
<td>5</td>
<td>O</td>
<td></td>
<td>27713</td>
</tr>
<tr>
<td>Zip plus</td>
<td>characters</td>
<td>4</td>
<td>O</td>
<td></td>
<td>2345</td>
</tr>
<tr>
<td>Effective date</td>
<td>Date</td>
<td>8</td>
<td>R</td>
<td>Date in MMDDYYYY format</td>
<td>01012012</td>
</tr>
<tr>
<td>Expiration date</td>
<td>Date</td>
<td>8</td>
<td>O</td>
<td>Date in MMDDYYYY format</td>
<td>12312012</td>
</tr>
<tr>
<td>Alias street name</td>
<td>characters</td>
<td>30</td>
<td>O</td>
<td></td>
<td>Main</td>
</tr>
<tr>
<td>Alias street prefix</td>
<td>characters</td>
<td>10</td>
<td>O</td>
<td></td>
<td>S</td>
</tr>
<tr>
<td>Alias street suffix</td>
<td>characters</td>
<td>10</td>
<td>O</td>
<td></td>
<td>NW</td>
</tr>
<tr>
<td>Alias street type</td>
<td>characters</td>
<td>20</td>
<td>O</td>
<td>Standard street type abbreviations are provided in this document.</td>
<td>ST</td>
</tr>
<tr>
<td>Alias street number</td>
<td>numbers</td>
<td>6</td>
<td>O</td>
<td></td>
<td>500</td>
</tr>
<tr>
<td>Alias street range from</td>
<td>numbers</td>
<td>6</td>
<td>O</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alias street range to</td>
<td>numbers</td>
<td>6</td>
<td>O</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alias city</td>
<td>characters</td>
<td>35</td>
<td>O</td>
<td></td>
<td>Charlotte</td>
</tr>
<tr>
<td>Alias state</td>
<td>characters</td>
<td>2</td>
<td>O</td>
<td></td>
<td>NC</td>
</tr>
<tr>
<td>Alias zip code</td>
<td>characters</td>
<td>5</td>
<td>O</td>
<td></td>
<td>27713</td>
</tr>
<tr>
<td>Alias zip plus</td>
<td>characters</td>
<td>4</td>
<td>O</td>
<td></td>
<td>3234</td>
</tr>
<tr>
<td>Alias type</td>
<td>1</td>
<td>O</td>
<td>Valid values are Valid values are A: Abbreviation C: Name Change</td>
<td>A</td>
<td></td>
</tr>
<tr>
<td>Field Description</td>
<td>Data Type</td>
<td>Field Length</td>
<td>Required Conditional</td>
<td>Notes</td>
<td>Examples</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------</td>
<td>--------------</td>
<td>----------------------</td>
<td>-------</td>
<td>----------</td>
</tr>
<tr>
<td>Other Name</td>
<td></td>
<td></td>
<td></td>
<td>O: Other Name P: Preferred Name F: Former Name</td>
<td></td>
</tr>
<tr>
<td>Tax district type</td>
<td>characters</td>
<td>10</td>
<td>R</td>
<td>Tax District Type and Tax District will repeat to accommodate all tax districts for situs address. It will always start with COUNTY. Valid Tax district types are COUNTY CITY POLICE FIRE SPECIAL</td>
<td></td>
</tr>
<tr>
<td>Tax district</td>
<td>characters</td>
<td>10</td>
<td>R</td>
<td>COUNTY</td>
<td></td>
</tr>
</tbody>
</table>

The file record will look like the example given below when sent to VTS.

1. Situs address record

   RANDO~S~30~WEATHERLY~~~SQ~~0~999999~~8702743444~~RAMSEUR~NC~27316~~01011853~12312011~~~~~~~~~~COUNTY~G01~CITY~FO5

2. Situs address record with annexation: For annexation NCVTS will receive two records. One is a “retirement” record that sets the expiration date for an existing repository record and the other is a “replacement” record with an effective date after that date. See example below. The county address ID in the replacement record may remain the same or a new one may be used.

   RANDO~S~29~WEATHERLY~~~SQ~~0~999999~~8702743444~~RAMSEUR~NC~27316~~01011853~12312011~~~~~~~~~~COUNTY~G01~CITY~FO5
   RANDO~S~29~WEATHERLY~~~SQ~~0~999999~~8702743444~~RAMSEUR~NC~27316~~01012012~~~~~~~~~~COUNTY~G01~CITY~CO5

3. Alias record: Alias are for address point or address range. The fields present for master records also need to be present for alias record. For example, if master record is an address point, street number and alias street number is required for record type A.

   RANDO~A~55~WEATHERLY~~~SQ~100~~~~8702743444~~RAMSEUR~NC~27316~~01011853~LIBERTY~~ST~100~~~~RAMSEUR~NC~27316~~F~COUNTY~G01~CITY~CO5

4. Default address record

   RANDO~D~1001~ELM~~~ST~~~~~~ASHEBORO~NC~27203~~01011853~~~~~COUNTY~G01~CITY~CO1
## Appendix D: Situs Error Log Definitions

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Invalid record type, street type, direction prefix, direction suffix or no street name</td>
</tr>
<tr>
<td>2.</td>
<td>Date range overlaps with the date range of another record with the same County Address ID</td>
</tr>
<tr>
<td>4.</td>
<td>Incorrect county code</td>
</tr>
<tr>
<td>5.</td>
<td>Both a street number and a street range are present</td>
</tr>
<tr>
<td>6.</td>
<td>No tax district information</td>
</tr>
<tr>
<td>7.</td>
<td>Street number or range overlaps with another record on the same street in the upload</td>
</tr>
<tr>
<td>9.</td>
<td>County Address ID/Effective Date combination does not exist in the database or the upload</td>
</tr>
<tr>
<td>11.</td>
<td>Date range overlaps with another default address in the uploaded data</td>
</tr>
<tr>
<td>12.</td>
<td>Date range overlaps with an existing default address</td>
</tr>
<tr>
<td>13.</td>
<td>Would alter tax districts for an address that is attached to a valid bill</td>
</tr>
<tr>
<td>14.</td>
<td>Street number or range overlaps with another record on the same street in the database</td>
</tr>
<tr>
<td>15.</td>
<td>Would retire an address prior to the creation date of an attached abstract and no Generic address exists with matching tax districts</td>
</tr>
<tr>
<td>16.</td>
<td>Overlaps a database record which has no corresponding retirement record in the upload</td>
</tr>
<tr>
<td>17.</td>
<td>Effective date is null or invalid</td>
</tr>
<tr>
<td>18.</td>
<td>Expiration date is invalid</td>
</tr>
<tr>
<td>19.</td>
<td>Expiration date is before effective date</td>
</tr>
<tr>
<td>20.</td>
<td>City is invalid</td>
</tr>
<tr>
<td>21.</td>
<td>Alias city is invalid</td>
</tr>
<tr>
<td>Error Code</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
</tr>
<tr>
<td>22.</td>
<td>One or more invalid tax districts</td>
</tr>
<tr>
<td>23.</td>
<td>Neither a street range nor a street number is present</td>
</tr>
<tr>
<td>24.</td>
<td>Street range or street number is non-numeric or longer than six digits</td>
</tr>
<tr>
<td>25.</td>
<td>Parcel numbers of &quot;GENERIC&quot; are not permitted</td>
</tr>
<tr>
<td>26.</td>
<td>Alias record does not have a valid master Situs record</td>
</tr>
<tr>
<td>27.</td>
<td>Neither a valid city nor a zip are present</td>
</tr>
<tr>
<td>28.</td>
<td>Non-empty zip or zip plus that is invalid</td>
</tr>
<tr>
<td>29.</td>
<td>Missing or non-numeric county address ID</td>
</tr>
<tr>
<td>30.</td>
<td>One or more tax districts lacks a tax rate in the current year</td>
</tr>
</tbody>
</table>
Appendices

Appendix E: Printing a Tax Receipt

NCVTS includes functionality on the Bill Detail page that allows users to print a receipt for property taxes only. If the citizen would like an official receipt, they must contact DMV.

Exercise Steps

1. Click the Search link in the upper right of the page.

2. Click the Bill tab, enter search criteria, and click the Search button.

3. Click the desired Bill #.

4. Click the Print button in the upper right corner.

5. Select Open in the popup box to display the receipt in Word.

6. In the toolbar, click on File, then Print.

7. Update your print settings as desired and select Print.

⚠️ Each office should discuss with their County Attorney the information that may be legally printed and given to the taxpayer from NCVTS.
## Index

Abstract Records .................................. 25–36  
Reversing ........................................... 64  

Abstract Records  
County Transfer .................................. 124  
Antique ............................................. 85  
Exporting ........................................ 30  
Basket View ...................................... 79  
Information Tabs .................................. 32  
Condition ......................................... 92  
Multiple Processing .............................. 126  
County Transfer ................................. 122  
Searching ......................................... 26  
Default Address ................................. 119  

Abstract Service Cart .......................... 83–84  
Exempt ............................................. 94  
Adjustments ....................................... 40–58  
Group View ....................................... 79  
Approving ........................................ 57  
Manager View ................................... 80  
Condition ......................................... 49  
No Value ......................................... 100  
High Mileage ..................................... 52  
Notes ............................................... 95  
Military ............................................. 45  
Plus Code ......................................... 89  
Rejecting .......................................... 57  
RV .................................................. 105  
Searching ......................................... 43  
Trailer ............................................. 103  
Situs Address ..................................... 55  
Vehicle Tax ....................................... 78  
Assignments ...................................... 142–44  
Vintage ............................................. 87  
Board Meeting Dates ........................... 150  
Refunds ........................................... 65–72  
Data Export ................................. See Abstract Records  
Authorizing ...................................... 67  
Data Flow ........................................ 8–12  
Prorations ....................................... 69  
Billing ............................................... 11  
Searching ......................................... 71  
Business .......................................... 8  
Voiding ........................................... 72  
NCVTS ............................................ 9  
Reports ........................................... 164–201  
Payment .......................................... 12  
Access ............................................ 166  
Depreciation Schedule ......................... 153  
County Finance .................................. 198  
Finance Reports ................................. 192  
County Reconciliation ......................... 193  
High Mileage .................................... 151  
Default Bill Situs ............................... 176  
Logs ............................................... 159  
Exclusion ......................................... 177  
NCID ............................................ 15, 207  
Exempt ........................................... 179  
Access ............................................ 15  
Exporting ......................................... 171  
Setup ............................................. 207  
Gap Billing ....................................... 180  
NCVTS ............................................ 6  
Navigating ....................................... 169  
Access ............................................ 15  
Net Distribution .................................. 200  
Navigating ....................................... 16  
Parameters ..................................... 167  
Searching ....................................... 19  
Pending Refund ................................. 195  
Terminology .................................... 205  
Printing .......................................... 172  
Web Page Functionality ....................... 18  
Run ............................................... 168  
Notes ............................................ 35  
Tax Billing Detail ............................... 182  
Adding .......................................... 35  
Tax Billing Summary ......................... 182  
Editing .......................................... 36  
Tax Collection Data ........................... 186  
Printing a Tax Receipt ......................... 215  
TR1 Vehicle ..................................... 185  
Prorations ....................................... 60–64  
Upload .......................................... 188  
Processing ...................................... 61  
Roles ............................................. 138–39  

NCVTS County User Training Guide
Appendices

Searches

Abstract

Adjustment

Advanced

Appeal

Bill

Quick

Situs

Situs

Aliases

County Address ID

Downloading File

Error Log Definitions

File Layout

Highway

Process

Repository

Street Add

Uploading File

Tax Rate Schedules

Users

Editing

New

Searching

19–22

21

21

22

22

22

20

21

108–28

117

114

157

112

111

112

155

145–49

133–37

134

136

134

145–49

133–37

134

136

134