

Tax Calculation Checklist

[Note: This document is intended as a companion to the "Tax Calculation Process" document.](#)

	Calculation Steps	Done?	Workspace/Menu	Navigation		
Preparation	1	Review / Edit Tax Unit Master Info		Edit	Adjust Preference System Config Tax Units	
	2	Create / Clone Tax Period (once per tax period)		Tax Roll Setup	Tools Create/Clone Tax Period	Instructions
	3	Change Default Tax Period (once per tax period)		Edit	Adjust Preference User Config User Options	
	4	Edit Tax Unit Control Record General Info		Tax Roll Setup	View Tax Unit General Info	Instructions
	5	Import PRE Updates		File	Import Load Parcel Values	Instructions
	6	Add, and Edit Calculated Levy Definitions		Tax Roll Setup	View Tax Levy Definitions	Instructions
Calculation	7	Create Tax Bills		Prepare Tax Bills	Tools	Instructions
	8	Verify Calculated Tax Totals		Reports		Instructions
	9	Adjust Levy Definitions and Re-calculate		Tax Roll Setup	View Tax Levy Definitions	
	10	Import Special Assessments		Prepare Tax Bills	Tools	Instructions
	11	Verify Imported Special Assessment Totals		Reports		Instructions
	12	Manually Add Special Assessments		Prepare Tax Bills	Tools	Instructions
	13	Verify Manually Added Special Assessment Totals		Reports		
Updates	14	Update Tax Bills with Post-Calculation PRE Changes		Prepare Tax Bills	Quick Search Select Edit	Instructions
	15	Update Names, Addresses & Property Descriptions		Prepare Tax Bills	Tools Create / Update Tax Bills	
	16	Add Delinquent Notices - Tax Bill 'Flags'		Prepare Tax Bills	Tools	Instructions
	17	Assign Tax Bill Numbers		Prepare Tax Bills	Tools	
	18	Print Tax Bills		Reports	Tax Bills Bills and Notices	Instructions
	19	Print Tax Advice		Reports	Tax Bills Bills and Notices	
	20	Print Receipts		Reports	Tax Bills Bills and Notices	
	21	Export Tax Rolls (once per tax period)		File	Export Export Tax Rolls	Instructions
	22	Print Tax Rolls		Reports	Tax Bills Tax Rolls	
	23	Print Alpha List		Reports	Tax Bills Alpha Lists	