



Electronic TRIM User Guide (eTRIM)

Florida Department of Revenue

Property Tax Oversight

**Truth In Millage
(TRIM)**

eTRIM Instructions

Welcome to eTRIM, the Department of Revenue's Internet-based system for completing and submitting documents related to the Florida's Truth-In-Millage (TRIM) and maximum millage oversight processes. Using this system, property appraisers will be able to electronically transmit value data to taxing authorities within their county. Taxing authorities will be able to complete and return their TRIM forms to the property appraiser for input into the Notice of Proposed Property Taxes (TRIM Notice). Taxing authorities will also be able to complete and transmit their final TRIM and maximum millage forms to the Department for review.

There are six distinct steps in the eTRIM process, each involving data entry by either the property appraiser or the taxing authority. At the conclusion of each step, an email should be sent to the next participant with a notification that the next step can begin. The six steps are:

Step 1 – Property Appraiser DR-420 Initiation: The property appraiser initiates the process by filling out the top portion of the DR-420, DR-420TIF, DR-420S and DR- 420DEBT forms for all levies in the county.

Step 2 – Principal Authority DR-420 Completion: Each principal authority completes the bottom portion of the applicable DR-420, DR-420TIF, DR-420S and DR-420DEBT forms for all levies of the principal authority and its dependent districts and MSTUs. The date, time and place of the preliminary public hearing (final hearing for school districts) must be reported. Non-school principal authorities also complete the DR-420MMP.

Step 3 - Property Appraiser DR-420 Acceptance: Once the principal authorities have completed the bottom portion of the required DR-420 forms and the DR-420MMPs and notified the property appraiser, the property appraiser will notify the principal authority of acceptance of the forms and transmittal to the Department of Revenue. The property appraiser can then proceed with the preparation of the Notice of Proposed Property Taxes.

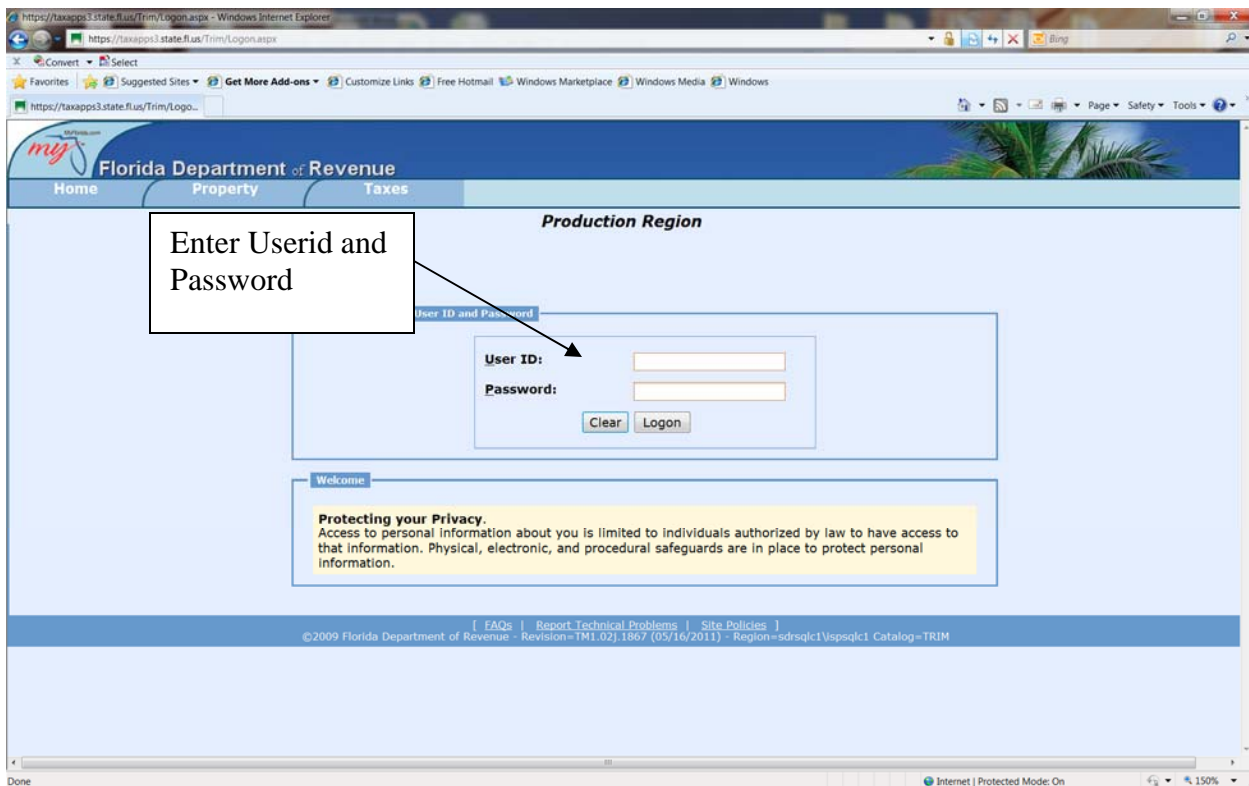
Step 4 - Principal Authority Certification of Final Millage: Once the taxing authority has completed its final budget and millage hearing, the DR-487 and DR-420MM forms will be available for completion and transmittal to the Department.

Step 5 - Property Appraiser DR-422 Process: Prior to the extension of the roll to the tax collector, the property appraiser will complete the top portion of the DR-422 and transmit it to the principal authorities.

Step 6 – Principal Authority Return of DR-422: The principal authorities have three days to complete the bottom portion of the DR-422 and return it to the property appraiser.

Instructions for each step in the eTRIM process follow. It is important to note that the system cannot progress from one step to the next until all relevant forms are completed and the certification button clicked. For those steps completed by the property appraiser, this means that the forms for all principal authorities (and their related dependent districts and MSTUs) in the county must be completed and certified before any principal authority can begin the next step. (For TRIM purposes, the term “principal authority” refers to a county, municipality, school district or independent special district.) Likewise for principal authorities, all forms for the principal authority and its dependent districts and MSTUs must be completed before certification to the property appraiser. For steps involving all principal authorities, the system cannot progress to the next step until all principal authorities have certified their forms.

Use the link <https://taxapps3.state.fl.us/Trim/Logon.aspx> to access the eTRIM system and log in with your provided userid and password.



Step 1 – Property Appraiser DR-420 Initiation

Step 1 in the eTRIM process involves the property appraiser completing the top part of Form DR-420, Form DR-420S and/or Form DR-420Debt. For tax levies for which a contribution to tax increment finance districts is made, the top part of the Form DR-420TIF worksheets must also be completed. When complete, the forms are electronically certified to the respective principal authorities in the county for completion of their portions of the forms.

When the property appraiser logs on, the first page to appear is the Summary Page (Return to Levies Page). From this page, the property appraiser can access the individual forms required in his or her county for data entry and editing, opt to upload the required TRIM data, view the data entry status of each levy, download data into an Excel spreadsheet, and certify the completed forms to each principal authority in the county. Levies of all principal authorities are listed when the page is initially accessed. If desired, levies of only a single principal authority may be displayed through the drop down menu just above the levy list.

Summary Page

Statuses

	TA Name	PA Type	TA Type	Description	Category	Status_420X	Status_422	PA-TA-Levy ID
Edit	LAFAYETTE COUNTY BCC	County	Principal Authority	GENERAL FUND*	Local	1	1	335-335-417
Edit	LAFAYETTE CO SCHOOL DIST	School	Principal Authority	LOCAL BOARD	School	1	1	336-336-418
Edit	TOWN OF MAYO	City	Principal Authority	GENERAL FUND	Local	1	1	337-337-420
Edit	SUWANNEE RIVER WATER MGT DIS	WMD	Principal Authority	Lafayette SRWMD	Local	1	1	764-1554-1747

	Year	CountyCode	PA_Name	EmailAddress
Edit	2011	44	LAFAYETTE COUNTY PROPERTY APPRAISER	

Click "Edit" Button

Enter/Edit Data: To enter or edit data on the various DR-420 forms, click the Edit button to the left of the levy on the Summary Page. The required forms associated with that levy are displayed. For non-school principal authorities required to make tax increment finance payments, a tab to the right of the DR-420 form will access the relevant DR-420TIF worksheets. New TIF forms may be created by clicking “New” button below the list of current TIF forms. Data fields to be completed by the property appraiser are shown in black type. Fields that are either calculated from entered fields or are to be completed by the taxing authority are shown in light grey type. **The Save button at the bottom of the page must be clicked in order to save entered data.** If a new levy is required, the property appraiser must contact the eTRIM administrator at eTRIM@dor.state.fl.us or 850.617.8919.

The following lines must be completed on each form. The remaining fields are either calculated from other entries or are to be completed by the principal authorities.

DR-420: 1, 2, 3, 5, 7

DR-420TIF: 1, 2, 4

DR-420DEBT: 1, 2, 3

DR-420S: 1, 2, 3, 5, 7

Upload Data: Property appraisers have the option of creating a comma delimited file and uploading the TRIM data into the system by click the Utilities Tab.

After entering data, the property appraiser can either return to the Summary Page by clicking the Return to Levies tab at the top or, if TIF forms must be completed, click the TIF tab. Line 8 on the DR-420 shows the number of TIF forms associated with the levy. TIF forms can be added or deleted when the DR-420TIF tab is clicked. Once the property appraiser is satisfied that the data entered on the main form and the associated TIF forms is complete, the Ready for Certification button can be clicked. The Ready for Certification status will then be indicated both on the Levy Page and on the Summary Page. If further editing is needed, the form can be re-accessed by clicking the Re-Open Record button. These buttons appear only on the DR-420 page. Before indicating Ready for Certification, please be sure that any associated TIF forms have been completed.

Status: It is important to understand the status assigned to each levy during the process. The levy status is displayed for each levy on the Summary Page and also on the top of the DR-420 form page. The following statuses are applicable to each levy in this step of the process:

1. *Property Appraiser 420 Assigned:* This is the initial status before any modifications to the form have been made.

2. *Property Appraiser 420 in Progress*: This status indicates that some modifications have been made to the form, but that the property appraiser has not marked the form as ready for certification.

3. *Property Appraiser 420 Ready for Certification*: This status indicates that the property appraiser has marked the form as ready for certification by clicking the Ready for Certification button on the DR-420 form. Please note that the property appraiser is responsible for ensuring that all required data has been correctly entered for both the DR- 420 form and any associated TIF worksheets.

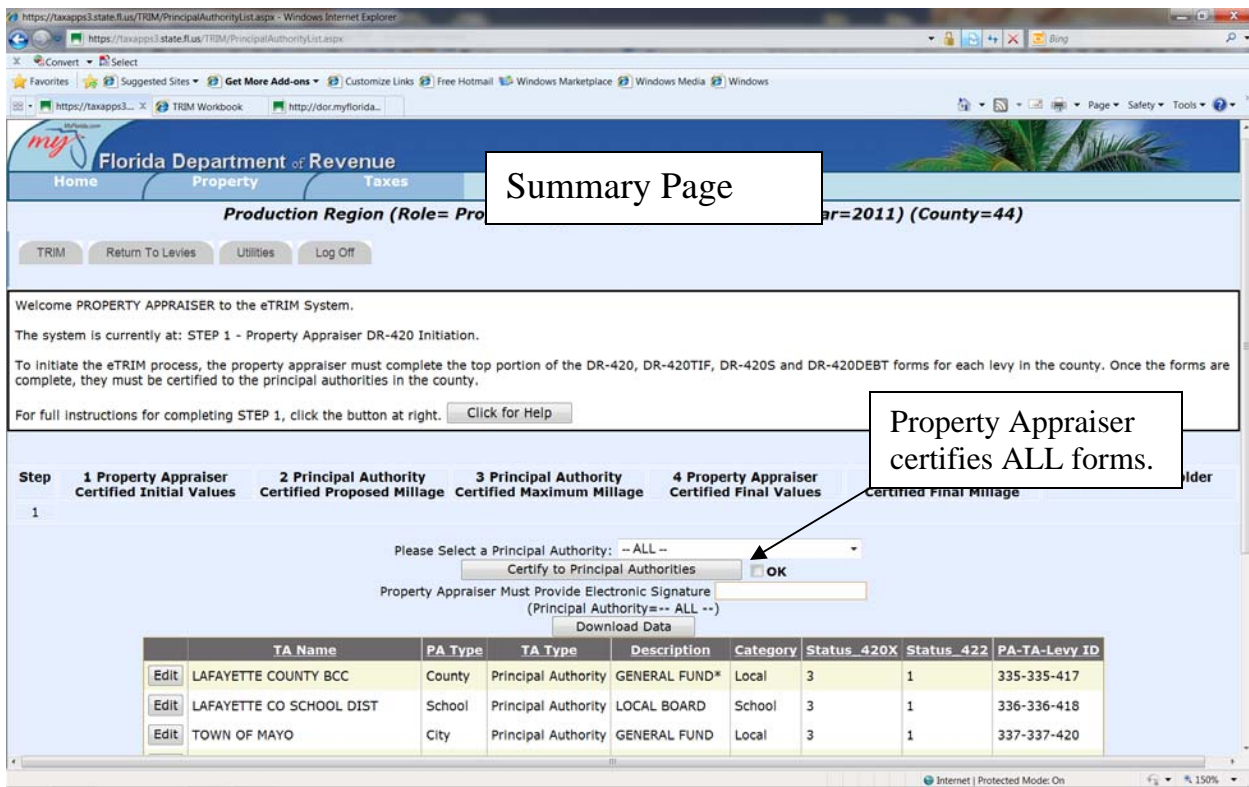
4. *Principal Authority 420 Assigned*: This status indicates that the property appraiser has completed data entry and certified the DR-420 forms to the respective principal authorities in the county. It is also the first status in Step 2.

Excel Download: At any time during the process, the property appraiser can download the data from all levies in his or her county into an Excel spreadsheet. The Download button is located in the center of the Summary Page (Return to Levies Page) just above the list of levies.

Certify to Principal Authorities: During Step 1, the property appraiser always has the ability to certify to the principal authorities and move to Step 2 by clicking the Certify to Principal Authorities button near the top of the Summary Page. Clicking this button will change the status of all levies to Principal Authority 420 Assigned (status 4) and notify the respective principal authorities that their forms are available for input. In certifying the completed forms, please note: Before the Certify to Principal Authorities button can be clicked, the property appraiser's electronic signature code must be entered. This code will be provided to the property appraiser by email.

The forms for all levies in the county must be certified at once. Individual forms or the forms of a single principal authority cannot be certified separately. Once the forms have been certified and changed to status 4, only the Department of Revenue can return the forms to the property appraiser for further modification. If an error on a certified form is discovered, please contact the eTRIM administrator at eTRIM@dor.state.fl.us or 850.617.8919. The principal authorities should be contacted also.

In order to click the Certify to Principal Authorities button, the status of all forms DOES NOT have to be Ready for Certification. It is the property appraiser's responsibility to ensure that the data is correct and complete prior to certification.



Suggested Email to Taxing Authorities:

To insure timely notification of all principal authorities, it is strongly recommended that the property appraiser email each principal authority that their TRIM forms are available for completion and advise them of any requested completion dates. A suggested email is below:

To: Each Principal Authority
 From: Property Appraiser
 Subject: Certification of DR-420 Forms

The property appraiser's office has completed the first step in the TRIM process on eTRIM, the Department of Revenue's Internet-based system for completing and submitting documents related to the Florida's Truth-In-Millage (TRIM) and maximum millage oversight processes. The DR-420, DR-420TIF, DR-420DEBT, DR-420S and DR-420MMP are now available on-line for taxing authorities to complete and return to the property appraiser's office. These forms can be accessed at: <https://taxapps3.state.fl.us/Trim/Logon.aspx>

Your userIDs and passwords should previously have been sent to you by the Department of Revenue. If not, please contact the Department at: eTRIM@dor.state.fl.us. eTRIM instructions can be downloaded at <http://dor.myflorida.com/dor/property/trim/pdf/etriminstructions.pdf>.

For questions involving the operation of the eTRIM system, please contact the Department of Revenue. For questions involving value information on the forms, please contact this office. In order to allow the TRIM process to operate on schedule, you are requested to complete and certify these forms back to this office by [date].

Step 2 - Principal Authority DR-420 Completion

Step 2 in the eTRIM process involves each principal authority in the county completing the bottom portion of Form DR-420, Form DR-420S and/or Form DR-420DEBT. For tax levies for which a contribution to tax increment finance districts is made, the bottom portion of Form DR-420TIF worksheet must also be completed. Form DR-420MMP must be filled out by non-school principal authorities. Please note that any fields that are calculated or picked up from other entries into the system will already be filled in and cannot be changed. For a number of forms, there are relatively few fields for which data has to be entered. Once the forms are completed, the principal authority will electronically certify the forms back to the property appraiser. When the principal authority logs on, the first page to appear is the Summary Page (Return to Levies Page). From this page, the principal authority can data enter/edit the individual forms required for each of its levies, view the data entry status of each levy, enter the date, time and location of the preliminary hearing (final hearing for school districts) and certify the completed forms back to the property appraiser. All levies of the principal authority are listed on the Summary Page.

Welcome PRINCIPAL AUTHORITY to the eTRIM System.
 The system is currently at: STEP 1 - Property Appraiser DR-420 Initiation.
 Forms for your principal authority and their status can currently be viewed below, but you will not be able to enter data until the property appraiser completes STEP 1 and certifies the forms to you. Email notification will be sent to you when this occurs.
 To understand what is occurring in STEP 1, the property appraiser's instructions for completing this step can be viewed by clicking the button to the right. [Click for Help](#)

Step	1 Property Appraiser Certified Initial Values	2 Principal Authority Certified Proposed Millage	3 Principal Authority Certified Maximum Millage	4 Property Appraiser Certified Final Values	5 Principal Authority Certified Final Millage	6 Status Placeholder
1						

(Principal Authority=LAFAYETTE COUNTY BCC)
[Download Data](#)

TA Name	PA Type	TA Type	Description	Category	Status_420X	Status_422	PA-TA-Levy ID
Edit LAFAYETTE COUNTY BCC	County	Principal Authority	GENERAL FUND*	Local	3	1	335-335-417

Year	CountyCode	PA_Name	EmailAddress
Edit 2011	44	LAFAYETTE COUNTY PROPERTY APPRAISER	

Enter/Edit Data: To enter or edit data on the various DR-420 forms, click the Edit button to the left of the levy on the Summary Page. The required forms associated with that levy are displayed.

For non-school principal authorities required to make tax increment finance payments, a tab at the top of the DR-420 form will access the relevant DR-420TIF worksheets. Non-school principal authorities must also complete the DR-420MMP. Data fields to be completed by the principal authority are shown in black type. Fields that are either calculated from entered fields or were completed by the property appraiser are shown in light grey type. **The Save button at the bottom of the page must be clicked in order to save entered data.**

The following lines must be completed on each form. The remaining fields have either been supplied by the property appraiser or are calculated from other entries.

DR-420: 10, 17

DR-420TIF: Either 6a and 6c or 7a

DR-420MMP: 3, 15

DR-420DEBT: 5, 6

DR-420S: 9, 10, 16, 17 and local board millage detail

After entering data, the principal authority can return to the Summary Page by clicking the Return to Levies tab at the top, click the TIF tab if TIF forms must be completed, or click the MMP tab to complete the DR-420MMP. Once the principal authority is satisfied that the data entered on the relevant forms for a levy is complete, the Ready for Certification button on the DR-420, 420S or 420DEBT form can be clicked. The Ready for Certification status will then be indicated on both the Levy Page and the Summary Page. If further editing is needed, the form can be re-accessed by clicking the Re-Open Record button.

Form: DR-420.aspx County: LAFAYETTE Principal Authority ID: 335 Taxing Authority ID: 335 Levy ID: 417 MultiCounty ID: 0

Entity	Description	Type	County
Principal Authority	LAFAYETTE COUNTY BCC	County	44
Taxing Authority	LAFAYETTE COUNTY BCC	Principal Authority	44
Levy	GENERAL FUND*	Local	44

Status 420: (4) Principal Authority 420 Assigned Status 422: (1) Property Appraiser 422 Assigned

Don't forget to complete the DR-420TIF and DR-420MMP forms.

DR-420 Form Section I			
1.	Current year taxable value of real property	1.	\$ <input type="text" value="0"/>
2.	Current year taxable value of personal property	2.	\$ <input type="text" value="0"/>
3.	Current year taxable value of central business district	3.	\$ <input type="text" value="0"/>
4.	Current year gross taxable value for all property	4.	\$ <input type="text" value="0"/>
5.	Current year net new taxable value (Add new construction, additions, rehabilitative improvements increasing assessed value by at least 100%, annexations, and tangible personal property value over 115% of the previous year's value. Subtract deletions.)	5.	\$ <input type="text" value="0"/>
6.	Current year adjusted taxable value (Line 4 minus Line 5)	6.	\$ <input type="text" value="0"/>
7.	Prior year FINAL gross taxable value (From prior year applicable Form DR-403 series)	7.	\$ <input type="text" value="0"/>
8.	Number of TIF Work Sheets	8.	<input type="text" value="0"/>
9.	Number of DEBT Work Sheets	9.	<input type="text" value="0"/>
DR-420 Form Section II			
10.	Prior year operating millage lev (if prior year millage was adjusted then use adjusted millage from Form DR-422.)	10.	<input type="text" value="0.0000"/>

Status: It is important to understand the status assigned to each levy during the process. The levy status is displayed for each levy on the Summary Page and also on the top of the DR-420 form page. The following statuses are applicable to each levy in this step of the process:

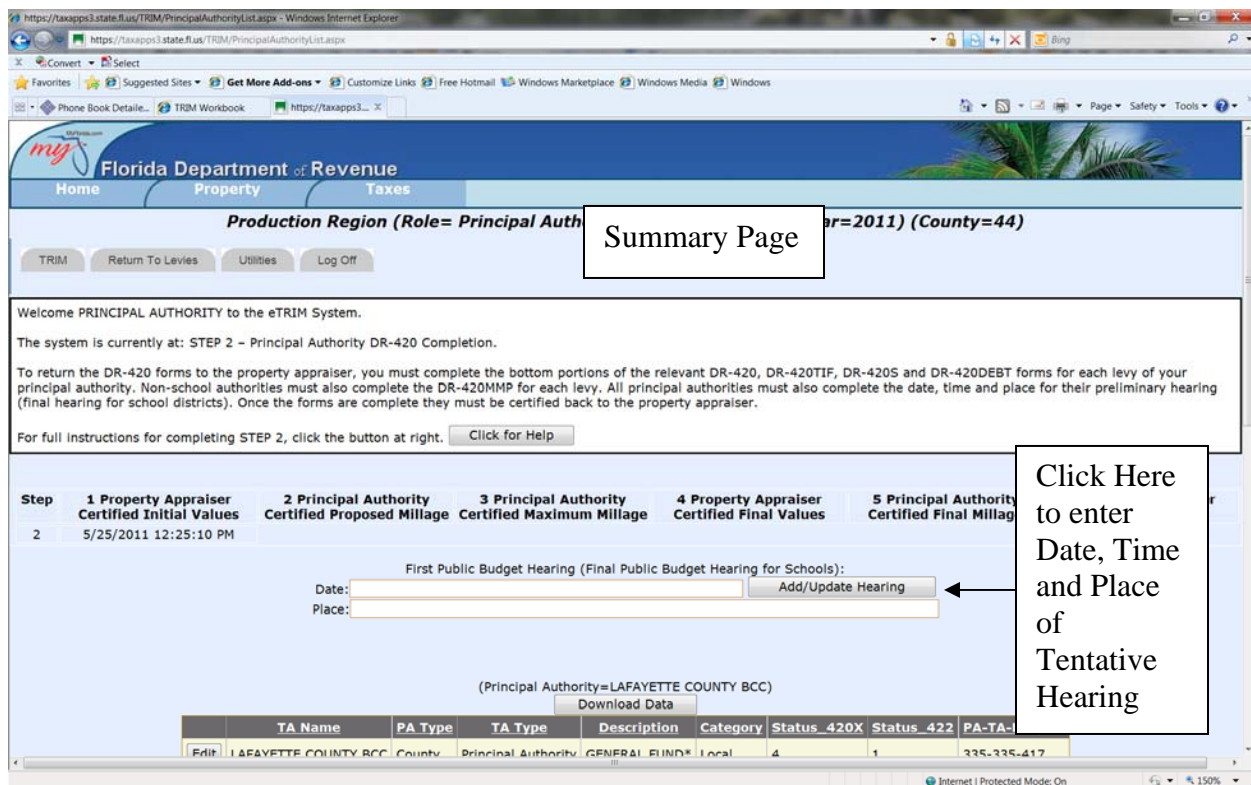
4. *Principal Authority 420 Assigned:* This is the initial status for the principal authority. It indicates that the property appraiser has completed the top portion of all DR-420 forms and certified them to the principal authority.

5. *Principal Authority 420 in Progress:* This status indicates that the principal authority has made some modifications to the form, but that the Ready for Certification button has not yet been clicked.

6. *Principal Authority 420 Ready for Certification*: This status indicates that the principal authority has marked the levy as ready for certification by clicking the Ready for Certification button on the DR-420 form.

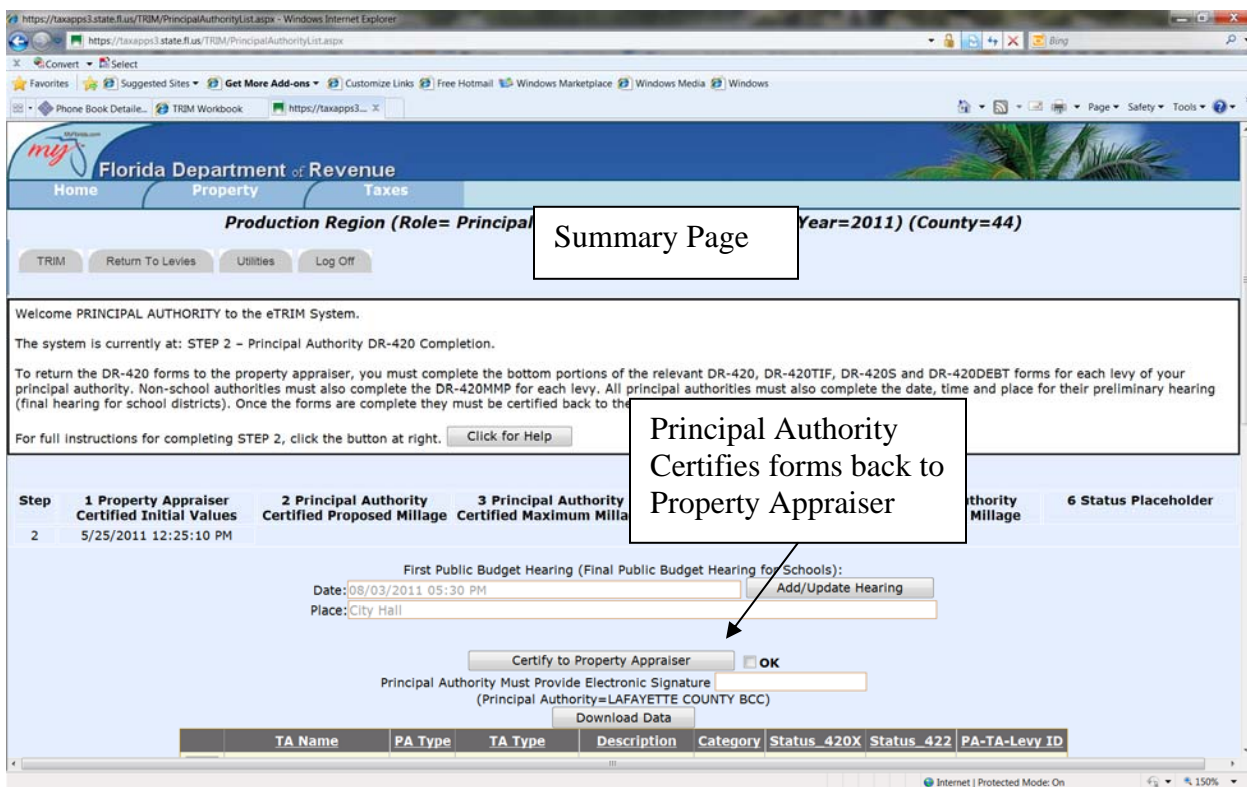
7. *Principal Authority Certified/Property Appraiser 420 Returned*: This status indicates that the principal authority has completed data entry and certified the DR-420 forms back to the property appraiser. This is also the first status in Step 3.

Date, Time and Location of Public Hearing: Prior to certifying the completed forms back to the property appraiser, the principal authority must fill out the date, time and location of the preliminary budget hearing (final budget hearing for school districts). Drop down menus for entering this data are located at the top of the Summary Page. **Please note that the Certify to Property Appraiser button will not appear until all of the principal authority’s levies have been marked as Ready for Certification and the date, time and location of the budget hearing have been entered.**



Certify to Property Appraiser:

After the principal authority has marked all levies as Ready for Certification and has entered the date, time and location of the budget hearing, the Certify to Property Appraiser button will appear near the top of the Summary Page. In certifying the completed forms, please note: Before the Certify to Property Appraiser button can be clicked, the principal authority’s electronic signature code must be entered. This code will be provided to the principal authority by email. The forms for all the levies of the principal authority must be certified at once. Individual levy forms cannot be certified separately.



Once the forms have been certified and changed to status 7, only the Department of Revenue can return the forms to the principal authority for further modification. If an error on a certified form is discovered, please contact eTRIM administrator at eTRIM@dor.state.fl.us or 850.617.8919. The property appraiser should be contacted also. In order to click the Certify to Property Appraiser button, the status of all forms must be Ready for Certification and the date, time and location of the budget hearing must be entered.

Since school districts do not have to complete the DR-420MM or the DR-487V, their next step will be Step 5. This is also the case for DR-420DEBT levies.

Special Instructions for Multi-County Authorities:

The rolled-back rate entered on the DR-420 by multi-county principal authorities should be the rolled-back rate calculated for the entire district, not just for the county for which the form is being completed. Likewise, the information on lines 22 – 27 of the DR-420 relating to the calculation of the aggregate rolled-back and proposed millage rates should be filled out for the district as a whole and not just the county for which the form is completed. The rolled-back rate and aggregate millage rate information should match what is entered on the authorities “District-wide” form.

When multi-county principal authorities enter the system, they will see their levies separately displayed for each county in which they levy a property tax. It is important to note that the DR-420 forms are certified directly to the property appraiser from the form for the particular county rather than from the Summary Page. Normally when a principal authority completes a form, the Ready for Certification button is clicked, moving the status from a 5 (*Principal Authority 420 in Progress*) to a 6 (*Principal Authority 420 Ready for 7 Certification*).

When all levies are moved to status 6, the Certify to Property Appraiser button will appear on the Summary Page allowing all forms to be certified at once. For multi-county authorities, however, different counties may be at different stages in the process. Therefore, the button that will appear on the DR-420 will be the Certify to Property Appraiser button instead of the Ready for Certification. Clicking the button will change the status directly from a 5 to a 7, certifying the form to the property appraiser. The form cannot be re-opened at this point except by contacting the Department's eTRIM administrator.

Suggested Email:

To insure timely notification of the property appraiser's office that the bottom portions of the DR-420 forms have completed and certified, it is strongly recommended that each principal authority notify the property appraiser's office that their TRIM forms are available for review. A suggested email is below:

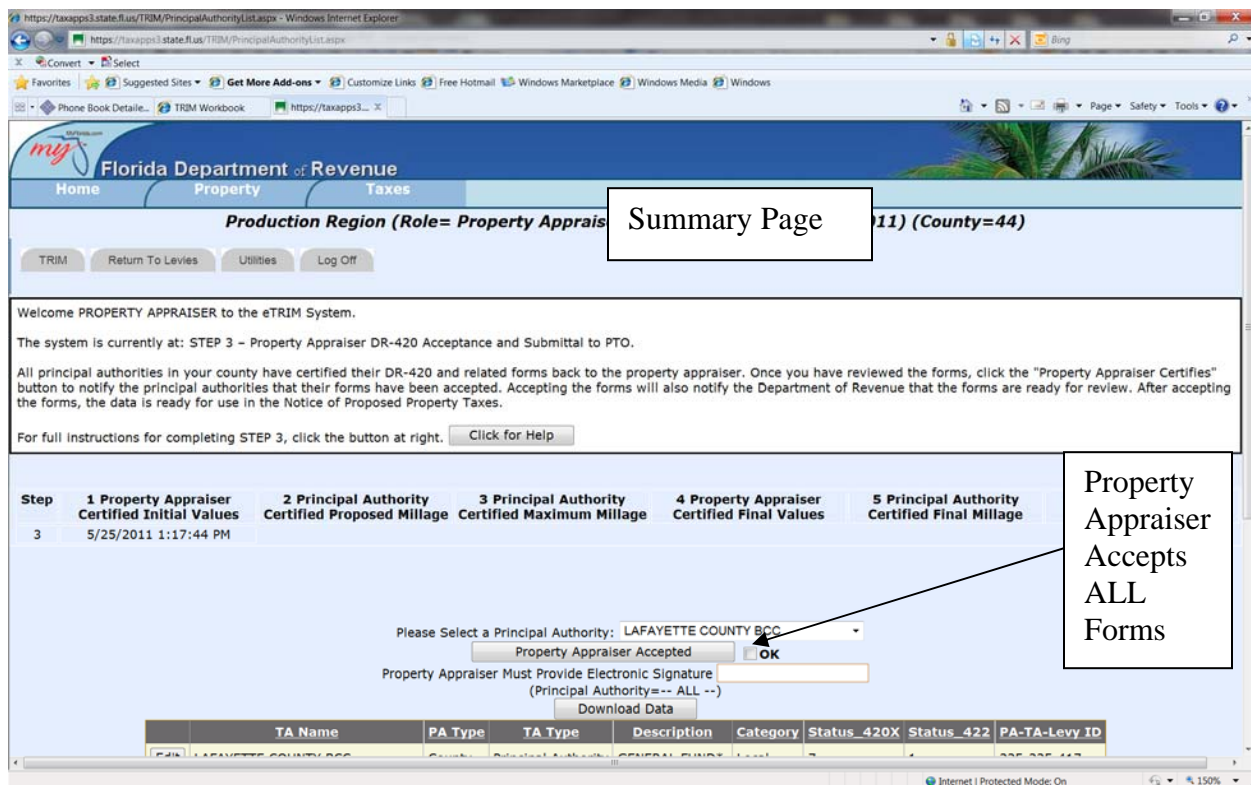
To: Property Appraiser's Office
From: [Principal Authority Name]
Subject: Certification of DR-420 Forms

[Principal authority name] has completed the second step in the TRIM process on eTRIM, completing the bottom portion of Form DR-420, Form DR-420TIF, Form DR-420S, DR-420DEBT and/or Form DR-420MMP, as appropriate. These forms have been certified to the property appraiser's office and are now available for review on the eTRIM system. Please let us know if there are any questions or concerns.

Step 3 - Property Appraiser DR-420 Acceptance

Step 3 in the eTRIM process involves the property appraiser reviewing and accepting the completed TRIM forms from the principal authorities and submitting the completed forms to the Department of Revenue. Forms needed to prepare the TRIM Notice of Proposed Property Taxes include Form DR-420, Form DR-420TIF, Form DR-420S and Form DR-420DEBT. Property appraisers also receive the completed Form DR-420MMP which is submitted to the Department of Revenue along with the other DR-420 forms.

When the property appraiser logs on, the first page to appear is the Summary Page (Return to Levies Page). From this page, the property appraiser can review the forms submitted by the principal authorities, accept the submitted data if complete and download the data into an Excel file for use in preparing the Notice of Proposed Property Taxes. Accepting the data also notifies the Department of Revenue that the submitted forms are ready for review.



Review Data: From the Summary Page, individual form data can be reviewed by clicking the edit button to the left of each millage levy. Data can also be reviewed in an Excel format by clicking the Download Data button above the list of levies on the Summary Page. If an error on a certified form is discovered, please contact the eTRIM administrator at eTRIM@dor.state.fl.us or 850.617.8919. The principal authorities should be contacted also.

Accept Data: Certified forms cannot be accepted by the property appraiser until all principal authorities in the county have certified their forms to the property appraiser. The status of all levies in the county must be at level 7 – *Principal Authority Certified/Property Appraiser 420 Returned*. The Property Appraiser Accepted button will appear on the Summary page when all levies are at status level 7. Accepting the forms will notify the Department of Revenue that the forms are ready for review by the Department and change the status to a level (8 - *Property Appraiser*

Accepted/Principal Authority 487 Ready) that will allow the principal authorities to begin preparing their DR-487V and DR-420MM following their final budget hearing. Please note that before the Property Appraiser Accepted button can be clicked, the property appraiser's electronic signature code must be entered. This code will be provided to the property appraiser by email.

Excel Download: Data from the certified forms may be downloaded into an Excel file at any time during this step. The Download Data button is located above the list of levies on the Summary Page.

Suggested Email: Upon acceptance of the completed DR-420 forms, it is recommended that property appraisers notify the principal authorities that all TRIM data has been accepted and the property appraiser's office is proceeding to print the *Notice of Proposed Property Taxes*. A suggested email is below:

To: Each Principal Authority
From: Property Appraiser
Subject: Acceptance of DR-420 Forms

This is to notify you that the property appraiser's office has reviewed and accepted all DR- 420 forms as completed and certified on the eTRIM system. This office is now preparing the *Notice of Proposed Property Taxes* for mailing. Thank you for your cooperation and assistance in preparing these forms.

Step 4 - Principal Authority Certification of Final Millage

Step 4 in the eTRIM process involves each non-school principal authority completing Form DR-487V to record the vote of the governing board adopting the final millage rate and Form DR-420MM certifying compliance with the maximum millage statutes. While these documents will be submitted electronically, a copy of each must also be submitted by regular mail with the required documentation that must accompany Form DR-487. School authorities must submit documentation by regular mail with Form DR-487 but do not have to complete a DR-487V or DR-420MM form. The next step for school authorities in the eTRIM process is Step 6 – Principal Authority Return of DR-422.

When the principal authority logs on, the first page to appear is the Summary Page (Return to Levies Page). While previously submitted forms may be viewed for reference, data may only be entered into the DR-487V and the DR-420MM. From this page, the principal authority can access the two forms to enter/edit data, review the status of each levy and electronically certify the completed forms to the Department of Revenue.

Enter/Edit Data:

To enter or edit data on the DR-487V and DR-420MM forms, click the Edit button to the left of the levy. The forms for that levy are displayed. Click the tab for the appropriate form. Data fields to be completed by the principal authority are shown in black type. Fields that are either calculated from entered fields or were completed by the property appraiser are shown in light grey type. **The Save button at the bottom of the DR-420MM page must be clicked in order to save entered data.**

Production Region (Role= Principal Authority) (User= rumlinm) (Year=2011) (County=44)

Form: DR-420.aspx County: LAFAYETTE Principal Authority ID: 335 Taxing Authority ID: 335 Levy ID: 417 MultiCounty ID: 0

Entity	Description	Type	County
Principal Authority	LAFAYETTE COUNTY BCC	County	44
Taxing Authority	LAFAYETTE COUNTY BCC	Principal Authority	44
Levy	GENERAL FUND*	Local	44

Status 420: (8) PropAppr Accepted/PrinCA 2 Assigned

At this Step In the process, o

Taxing Authorities Complete DR-420MM and DR-487V

DR-420 Form Section I

1.	Current year taxable value of real property for operating purposes	1.	\$ <input type="text" value="0"/>
2.	Current year taxable value of personal property for operating purposes	2.	\$ <input type="text" value="0"/>
3.	Current year taxable value of centrally assessed property for operating purposes	3.	\$ <input type="text" value="0"/>
4.	Current year gross taxable value for operating purposes (Line 1 plus Line 2 plus Line 3)	4.	\$ <input type="text" value="0"/>
5.	Current year net new taxable value (Add new construction, additions, rehabilitative improvements increasing assessed value by at least 100%, annexations, and tangible personal property value over 115% of the previous year's value. Subtract deletions.)	5.	\$ <input type="text" value="0"/>
6.	Current year adjusted taxable value (Line 4 minus Line 5)	6.	\$ <input type="text" value="0"/>
7.	Prior year FINAL gross taxable value (From prior year applicable Form DR-403 series)	7.	\$ <input type="text" value="0"/>

The following lines must be completed on each form. The remaining fields have either been supplied by the property appraiser or are calculated from other entries.

DR-420MM: 15

DR-487V: Name of each governing board member and indication of vote After entering data, the principal authority can return to the Summary Page by clicking the Return to Levies tab at the top or click the appropriate tab to complete the other form. Once the principal authority is satisfied that the data entered on the relevant forms for a levy is complete, the Ready for Certification button near the top of the DR-420MM form can be clicked. This status will then be indicated on the Levy Page and on the Summary Page. If further editing is needed on the DR- 420MM, the form can be re-accessed by clicking the Re-Open Record button. The DR-487V will remain editable.

Status:

It is important to understand the status assigned to each levy during the process. The levy status is displayed for each levy on the Summary Page and also on the top of each form. The following statuses are applicable to each levy in this step of the process:

8. *Property Appraiser Accepted/Principal Authority 487 Ready*: This is the initial status in Step 4 for the principal authority. This should be the status of all levies at the time of the final hearing.

9. *Principal Authority 487 in Progress*: This status indicates that the principal authority has made some modifications to the form, but that the Ready for Certification button near the top of the DR-420MM has not yet been clicked.

10. *Principal Authority 487 Ready for Certification*: This status indicates that the principal authority has marked the levy as ready for certification by clicking the Ready for Certification button near the top of the DR-420MM form.

11. *Principal Authority 487 Certified Adopted Millage*: This status indicates that the principal authority has completed data entry and certified the DR-487V and DR-420MM forms to the Department of Revenue.

Certify to the Department of Revenue

After the principal authority has marked all levies as Ready for Certification the Certify to Property Appraiser button will appear near the top of the Summary Page.

In certifying the completed forms, please note:

Before the Certify Adopted Millage button can be clicked, the principal authority's electronic signature code must be entered. This code will be provided to the principal authority by email. The forms for all the levies of the principal authority must be certified at once. Individual levy forms cannot be certified separately. In order to click the Certify to Property Appraiser button, the status of all forms must be *Principal Authority 487 Ready for Certification*. Once the forms have been certified and changed to status 11, only the Department of Revenue can return the forms to the principal authority for further modification. If an error on a certified form is discovered, please contact eTRIM administrator at eTRIM@dor.state.fl.us or 850.617.8919.

While the DR-487 and the DR-420MM will be submitted to the Department electronically, a copy of each must also be submitted by regular mail with the required documentation that must accompany Form DR-487.

Special Instructions for Multi-County Authorities

When multi-county principal authorities enter the system, they will see their levies separately displayed for each county in which they levy a property tax. It is important to note that the DR-

420MM and 487V forms are certified directly to the property appraiser from the form for the particular county rather than from the Summary Page. Normally when a principal authority completes a form, the Ready for Certification button is clicked, moving the status from a 9 (*Principal Authority 487 in Progress*) to a 10 (*Principal Authority 487 Ready for Certification*). When all levies are moved to status 10, the Certify to Property Appraiser button will appear on the Summary Page allowing all forms to be certified at once.

For multi-county authorities, however, different counties may be at different stages in the process. Therefore, the button that will appear on the DR-487MM will be the Certify to Property Appraiser button instead of the Ready for Certification. Clicking the button will change the status directly from a 9 to an 11, certifying the form to the property appraiser.

The form can only be re-opened at this point except by contacting the Department's eTRIM administrator.

Step 5 - Property Appraiser DR-422 Process

Step 5 in the eTRIM process involves the property appraiser completing the top part of Form DR-422. Completed forms are electronically certified to the respective principal authorities in the county for completion of their portions of the forms.

When the property appraiser logs on, the first page to appear is the Summary Page (Return to Levies Page). From this page, the property appraiser can access forms for each individual levy, input the top portion of the form, view the data entry status of each levy, and certify the completed forms to each principal authority in the county. While all forms are displayed for each levy, at this step in the process only the DR-422 can be edited. Levies of all principal authorities are listed when the page is initially accessed. If desired, levies of only a single principal authority may be displayed through the drop down menu just above the levy list.

Enter/Edit Data:

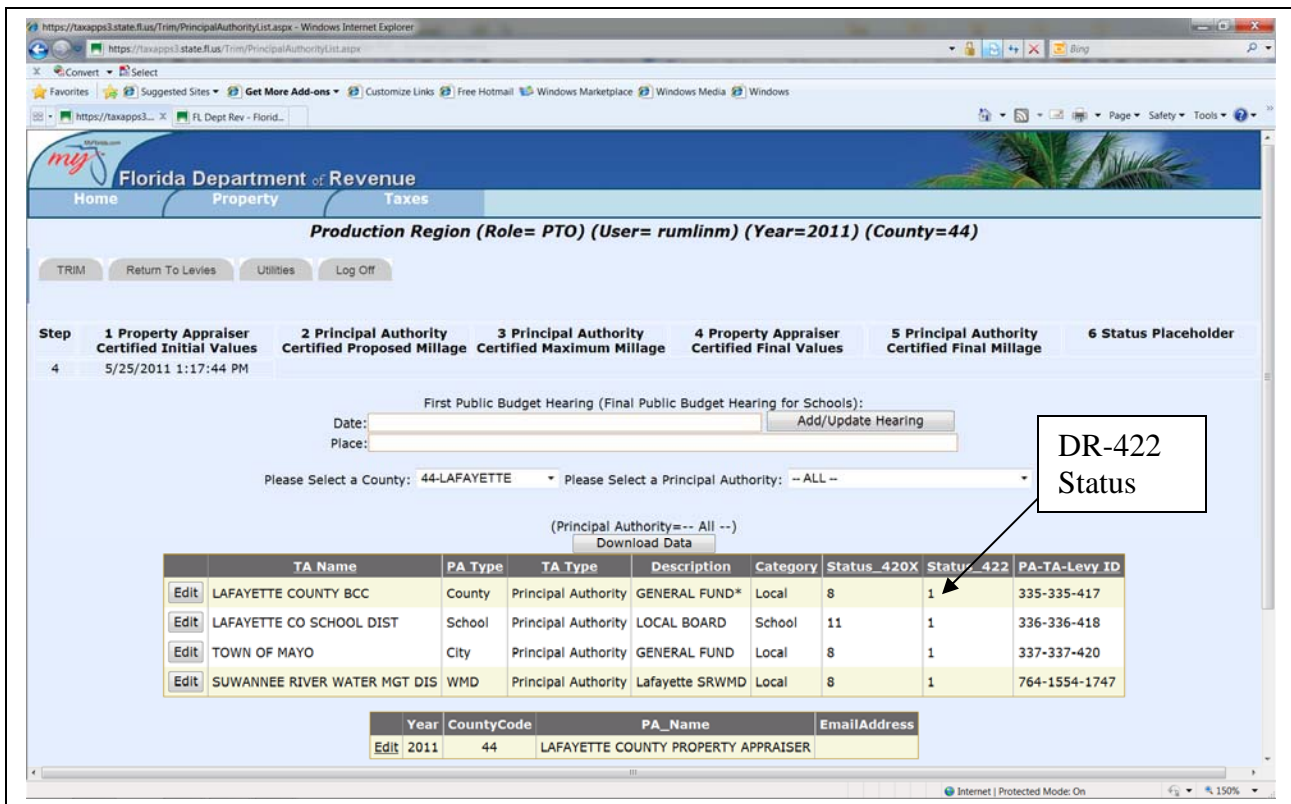
To enter or edit data on the DR-422 form, click the Edit button to the left of the levy. The forms for that levy are displayed. Click the tab for the DR-422. Data fields to be completed by the property appraiser are shown in black type. Fields that are either calculated from entered fields or are picked up from previously entered forms are shown in light grey type. The Save button at the bottom of the page must be clicked in order to save entered data.

The following line must be completed on Form DR-422. The remaining fields have entered earlier or calculated from other entries.

DR-422: 2

After entering the data, the property appraiser can return to the Summary Page by clicking the Return to Levies tab at the top. Once the property appraiser is satisfied that the data entered is correct, the Ready for Certification button near the top of each DR-422 can be clicked. The *Property Appraiser 422 Ready for Certification* status will then be indicated on the Levy Page and on the Summary Page. If further editing is needed, a form can be re-accessed by clicking the Re-Open Record button near the top of each form.

Status: It is important to understand the status assigned to each levy during the process. The levy status is displayed for each levy on the Summary Page and also on the top of the DR-422 form page. The following statuses are applicable to each levy in this step of the process:



1. *Property Appraiser 422 Assigned*: This is the initial status before any modifications to the form have been made.
2. *Property Appraiser 422 in Progress*: This status indicates that some modifications have been made to the form, but that the property appraiser has not marked the form as ready for certification.
3. *Property Appraiser 422 Ready for Certification*: This status indicates that the property appraiser has marked the form as ready for certification by clicking the Ready for Certification button on the DR-422 form. Please note that the property appraiser is responsible for ensuring that all required data has been correctly entered for both the DR- 422 form and any associated TIF worksheets.
4. *Principal Authority 422 Assigned*: This status indicates that the property appraiser has completed data entry and certified the DR-422 forms to the respective principal authorities in the county.

Certify to Principal Authorities:

Once the DR-422 forms for all levies in the county have been marked as Ready for Certification, the Certify to Principal Authorities button will appear near the top of the Summary Page.

Clicking this button will change the status of all levies to *Property Appraiser 422 Certified/Principal Authority 422 Assigned* and notify the respective principal authorities that their forms are available for input.

In certifying the completed forms, please note:

Before the Certify to Principal Authorities button can be clicked, the property appraiser’s electronic signature code must be entered. This code will be provided to the property appraiser by email.

The forms for all levies in the county must be certified at once. Individual forms or the forms of a single principal authority cannot be certified separately. Once the forms have been certified and changed to status 4, only the Department of Revenue can return the forms to the property appraiser for further modification. If an error on a certified form is discovered, please contact the eTRIM administrator at eTRIM@dor.state.fl.us or 850.617.8919. The principal authorities should be contacted also.

Suggested Email:

To insure timely notification of all principal authorities, it is strongly recommended that the property appraiser notify each principal authority that their DR-422 TRIM form is available for completion and advise them of the required completion date. A suggested email is below:

To: Each Principal Authority
From: Property Appraiser
Subject: Certification of DR-422 Form

The property appraiser's office has completed its portion of the DR-422: *Certification of Final Taxable Value*. This form is now available on eTRIM for taxing authorities to complete and certify to the property appraiser's office. The form can be accessed at:
<https://taxapps3.state.fl.us/Trim/Logon.aspx>

For any questions involving value information on the form, please contact this office. Questions regarding the operation of the eTRIM system should be addressed to the Department of Revenue at: eTRIM@dor.state.fl.us.

The DR-422 must be completed and certified on the eTRIM system by close of business on [date].

Step 6 – Principal Authority Return of DR-422

Step 6 in the eTRIM process involves the principal authority completing the bottom part of Form DR-422. Completed forms are electronically certified back to the property appraiser. When the principal authority logs on, the first page to appear is the Summary Page (Return to Levies Page). From this page, the principal authority can access the forms for each levy, input the bottom portion of the form, view the data entry status of each levy, and certify the completed forms back to the property appraiser. While all forms are displayed for each levy, at this step in the process only the DR-422 can be edited. All the levies of the principal authority are listed when the page is initially accessed.

Enter/Edit Data:

To enter or edit data on the DR-422 form, click the Edit button to the left of the levy. The forms for that levy are displayed. Click the tab for the DR-422. Data fields to be completed by the principal authority are shown in black type. Fields that are either calculated from entered fields or are to be completed by the property appraiser are shown in light grey type. The Save button at the bottom of the page must be clicked in order to save entered data.

The following lines must be completed on Form DR-422. The remaining fields have either been supplied by the property appraiser or are calculated from other entries.

DR-422: 4, 5, 6, 7, 8 as appropriate

After entering data, the principal authority can return to the Summary Page by clicking the Return to Levies tab at the top. Once the principal authority is satisfied that the data entered is correct, the Ready for Certification button near the top of each DR-422 form can be clicked. This status will then be indicated on the Levy Page and on the Summary Page. If further editing is needed, the form can be re-accessed by clicking the Re-Open Record button.

Status: It is important to understand the status assigned to each levy during the process. The levy status is displayed for each levy on the Summary Page and also on the top of the DR-422 form page. The following statuses are applicable to each levy in this step of the process:

5. Property Appraiser 422 Certified/Principal Authority 422 Assigned: This is the initial status. The status will not change until the principal authority has marked the form as ready for certification.

6. Principal Authority 422 Ready for Certification: This status indicates that the principal authority has marked the form as ready for certification by clicking the Ready for Certification button on the DR-422 form.

7. Principal Authority 422 Certified: This status indicates that the principal authority has completed data entry and certified the DR-422 forms back to the property appraiser.

8. Property Appraiser Accepted: This is the final step of the eTRIM process. This should be the status of all levies at the time of the submitting the TRIM package.

Certify to Principal Authorities:

Once the DR-422 forms for all levies of the principal authority have been marked as Ready for Certification, the Certify to Property Appraiser button will appear on the Summary Page. Clicking this button will change the status of all levies to *Principal Authority 422 Certified* and notify the property appraiser that the forms are complete.

In certifying the completed forms, please note:

Before the Certify to Property Appraiser button can be clicked, the principal authority's electronic signature code must be entered. This code will be provided to the principal authority by email. The forms for all levies of the principal authority must be certified at once. Individual forms or the forms for a single levy cannot be certified separately. If the principal authority chooses not to administratively adjust their millage rate, lines 5, 6, 7, and 8 should be left blank.

Once the forms have been certified and changed to status 7, only the Department of Revenue can return the forms to the property appraiser for further modification. If an error on a certified form is discovered, please contact the eTRIM administrator at eTRIM@dor.state.fl.us or 850.617.8919. The principal authorities should be contacted also.

Special Instructions for Multi-County Authorities

When multi-county principal authorities enter the system, they will see their levies separately displayed for each county in which they levy a property tax. It is important to note that the DR-422 form is certified directly to the property appraiser from the form for the particular county rather than from the Summary Page. Normally when a principal authority completes a form, the Ready for Certification button is clicked, moving the status from a 5 (*Property Appraiser 422 Certified/Principal Authority 422 Assigned*) to a 6 (*Principal Authority 422 Ready for Certification*).

When all levies are moved to status 6, the Certify to Property Appraiser button will appear on the Summary Page allowing all forms to be certified at once. For multi-county authorities, however, different counties may be at different stages in the process. Therefore, the button that will appear on the DR-422 will be the Certify to Property Appraiser button instead of the Ready for Certification. Clicking the button will change the status directly from a 6 to a 7, certifying the form to the property appraiser.

The form cannot be re-opened at this point except by contacting the Department's eTRIM administrator.

Suggested Email:

To insure timely notification of the property appraiser's office that the bottom portion of the DR-422 has been completed and certified, it is strongly recommended that each principal authority notify the property appraiser's office by email. A suggested email is below:

To: Property Appraiser's Office
From: [Principal Authority Name]
Subject: Certification of DR-422 Forms

[Principal authority name] has completed the bottom portion of Form DR-422: *Certification of Final Taxable Value*. This form has been certified to the property appraiser's office and is now available for review on the eTRIM system. Please let us know if there are any questions or concerns.