

# Office of the New York State Comptroller

Thomas P. DiNapoli • State Comptroller



## Schedule of Real Property Taxes

### Tax Data Verification Instructions for Towns and Cities

June 2020

Counties (and towns and cities in Westchester County) use the Tax Data Verification (TDV) application to report real property tax information for towns and cities within the County to the Office of the New York State Comptroller (OSC).

Each Tax Data Preparer should have access into our Online Services portal. See our [enrollment instructions](#) for information about how to access our online form.

File the tax data verification here:

<https://onlineservices.osc.state.ny.us/Enrollment>

### Tax Rolls

Local governments should provide New York State Department of Taxation and Finance (NYSDTF) with tax roll data extracts from the tax roll software.

Email the RPS160 files (or similar) to [Proptaxbills.datafiles@tax.ny.gov](mailto:Proptaxbills.datafiles@tax.ny.gov)

Send questions regarding submission of tax rolls to NYSDTF at [Proptaxbills.questions@tax.ny.gov](mailto:Proptaxbills.questions@tax.ny.gov)

### Questionnaire

OSC will request additional information from filers through a questionnaire in the TDV application.

1. [How to access the TDV application](#)
2. [Completing your questionnaire](#)
  - a. Detailed information on questionnaire topics
    - i. [Tax Rolls](#)
    - ii. [Assessed Values](#)
    - iii. [Split Lines](#)
    - iv. [Omitted Taxes](#)
    - v. [Extra Questions](#)
    - vi. [Additional Information](#)

OSC completes a secondary review of the information when the questionnaire is submitted. Then, filers review and approve the summary.

**For Westchester County filers only:** Filers review and approve the summary

- a. [How to review your summary](#)
- b. [How to approve the summary or request changes](#)



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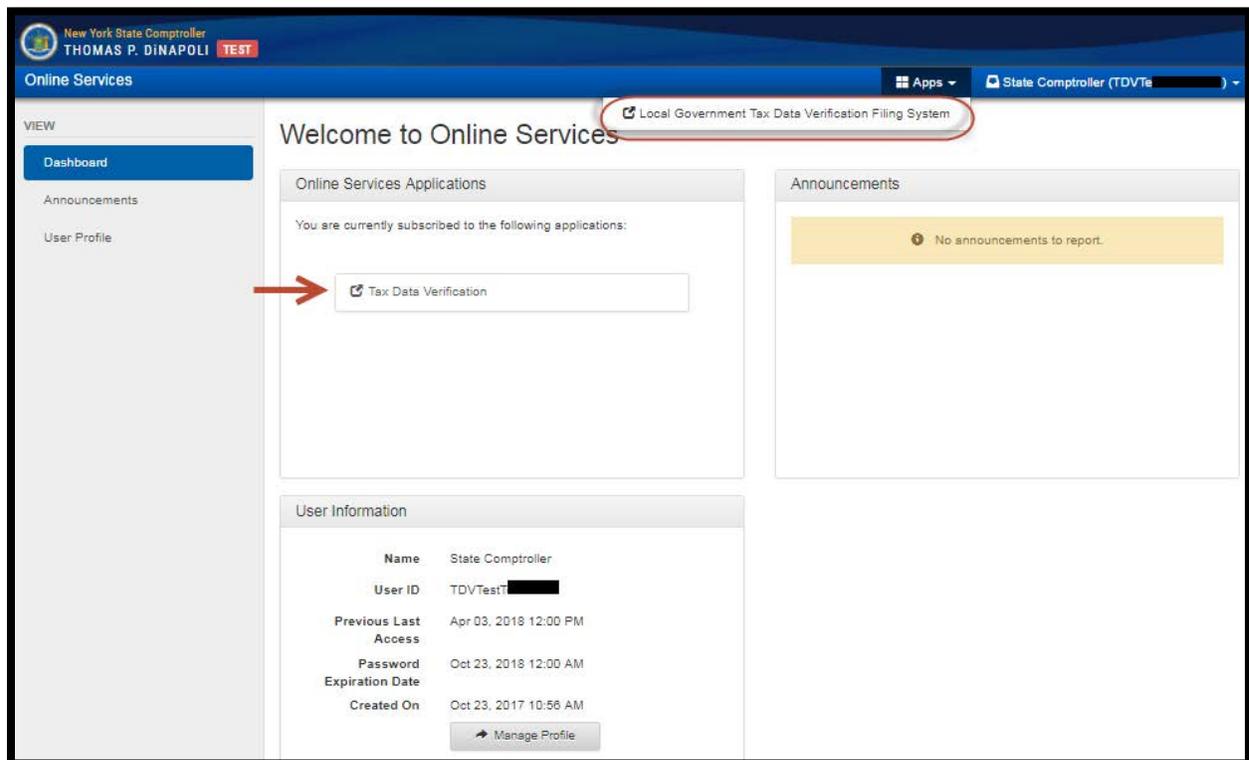
## How to access the Tax Data Verification application

OSC uses the [Online Services portal](#) for the Tax Data Verification (TDV) and Tax Cap filings. Each County or town/city in Westchester County has a designated TDV preparer in the online services system. The TDV preparer submits the questionnaire and the TDV approver approves the summary. In some cases additional information is needed from other local governments within the county. In these cases you may only be responsible for providing supplemental information.

Filers also responsible for filing the Tax Cap form can use their current Online Services User ID and Password to access the TDV application. Officials wanting read-only access should email [LGSATaxDataVerification@osc.ny.gov](mailto:LGSATaxDataVerification@osc.ny.gov) to request access.

See our [enrollment instructions](#) for further guidance.

Select **Tax Data Verification** from the body of the webpage or **Local Government Tax Data Verification Filing System** from the “Apps” drop down menu in the banner.



Select a fiscal year to access the form.

VIEW

Home

## Home

### Tax Data Verification

Use this online service to report your real property taxes and assessment information for the towns and cities within the County.

The system will provide information to assist you in completing your Tax Data Verification Form, **but it's your responsibility to ensure that the information is accurate.**

### How to Proceed

Select a fiscal year below.

Fiscal Year	Fiscal Year Status
2018	Open
2017	Closed
2016	Closed
2015	Closed

Filers will not be able to access the form during OSC review. Filers will be notified when the form is available.

## Tax Data Verification

Use this online service to report your real property taxes and assessment information for the towns and cities within the County.

The system will provide information to assist you in completing your Tax Data Verification Form, **but it's your responsibility to ensure that the information is accurate.**

### How to Proceed

Select a fiscal year below.

We're currently reviewing the data and we will notify you when you may complete the Tax Data Verification form.

Fiscal Year	Fiscal Year Status
2018	Open
2017	Closed
2016	Closed
2015	Closed

There are two navigation tools depending on your screen size or settings. You should see the navigation tools on each page. You may see a left navigation panel, or you may need to click the “small blue box” as shown here on the Summary screen to make the navigation panel appear.

The image shows two parts of a web application interface. On the left is a navigation panel with the following elements:

- FYE 2018
- County of [input field]
- City of [input field]
- Examiner: [input field]
- VIEW
- Home
- Questionnaire
- Summary** (highlighted in blue)
- Tax Roll Summary
- Town/City Calculations
- EXTERNAL LINKS
- [TDV Website](#)

On the right is the main content area titled "Summary":

## Summary

Review the summary totals below for the 2018 tax rolls corrections, comments or questions.

To view details, select the town or city name. The form your responsibility to ensure that the information is acc

Note that tax rates are calculated based on total taxes, value.

## Completing Your Questionnaire

Upon log-in, filers will see their individual questionnaire topics. The complete list of questionnaire topics is shown below. Filers will see ONLY the questions necessary for completing their town or city's review.

Select **Start** or the link for the first question. Provide the requested information for each topic and submit the completed form with any required supporting documentation. Contact the assigned examiner listed for any questions.

The screenshot shows the 'Tax Data Verification' interface. At the top, it displays the New York State Comptroller's name, 'THOMAS P. DiNAPOLI', and a 'TEST' button. The page title is 'Tax Data Verification'. On the left, there is a sidebar with 'FYE 2018' and fields for 'County of', 'Town of', and 'Examiner', all of which are redacted with black boxes. Below these are 'VIEW' options: 'Home' and 'Questionnaire' (which is highlighted). The main content area is titled 'Table of Contents'. A red message box states: 'Your questionnaire hasn't been submitted.' Below this, instructions read: 'Provide the necessary information for each applicable questionnaire topic and submit the completed form with any supporting documentation. If you have questions, contact [redacted]'. A prompt says: 'Choose a topic below or select the Start button to begin.' A table titled 'Questionnaire Topics' is shown with the following data:

Topic Name	Date Sent
<a href="#">Omitted Taxes</a>	04-09-2018
<a href="#">Extra Question</a>	04-09-2018
<a href="#">Additional Information</a>	04-09-2018

A 'Start' button is located at the bottom right of the interface.

### Question Topics

(Select a topic for more information)

[Tax Rolls](#) – If OSC has not received tax roll data or the files received are not compatible with our system.

[Assessed Values](#) – Townwide taxable assessed value is not available on the tax roll.

[Split Lines](#) – If the unit bills taxes for multiple purposes on one line on the tax roll, supply the breakdown by purpose.

[Omitted Taxes](#) – Counties, towns or cities that bill out omitted taxes for multiple local governments on one line of the tax roll need to provide a breakdown between county, city, town and independent special districts.

[Extra Questions](#) - Additional questions will be posted here. Enter required answers or upload supporting material.

[Additional Information](#) – Filers can provide additional information, feedback or comments to OSC.



## Review Summary

### For Towns & Cities of Westchester County Only.

OSC will send filers an e-mail notification when the "Summary" is available. Log in to Online Services to access the summary, which is available in the navigation panel on the left side of the screen.

While OSC makes every effort to ensure we have calculated the correct values, it is the filer's responsibility to ensure the information is accurate prior to approving the summary.

Use the scroll function to see the complete summary or export the summary to an excel spreadsheet.

Verify the following:

- Total taxes levied by purpose for county and town
- Total Taxable Assessed Values

Filers do not need to verify full value tax rates

County Summary		
Purpose Description	Total County Amounts	Town of <input type="text"/>
<b>County</b>		
County General Tax	\$31,484,309.77	\$31,484,309.77
County Sewer Tax	\$8,170,213.97	\$8,170,213.97
County Recycling & Garbage Taxes	\$2,895,508.12	\$2,895,508.12
<b>Total County Levy</b>	<b>\$40,550,031.86</b>	<b>\$40,550,031.86</b>
Taxable Assessed Value	No Value	145,644,275
Equalization Rate	No Value	0.014
<b>Taxable Full Value</b>	<b>\$10,184,914,336.00</b>	<b>\$10,184,914,336.00</b>
<b>Full Value Tax Rate</b>	<b>\$3.98</b>	<b>No Value</b>
<b>Town</b>		
Total Town General and Highway Levies	\$15,851,527.84	\$15,851,527.84
Town Fire Protection District	\$498,080.08	\$498,080.08
<a href="#">Export to Excel</a>		

The **Tax Roll Summary** screen will provide the special district summary and grand total section of the tax roll or the total for each taxing district as provided by the county. The **Total Amount Levied** (at bottom) should match the amount levied in total on your tax roll.

The **Select Purpose** function at the top of the screen will allow users to view the lines by purpose.

**Town of [REDACTED] Tax Roll Summary**

The information below should reflect your 2017 tax rolls.

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**Tax Lines**

Select Purpose

Line Desc	TAV	Amount Levied	Purpose
STREET LIGHT	170	\$8,000.20	Town Lighting District
Fire District	412,762,356	\$183,794.81	Fire District
Fire District	36,997,613	\$14,663.77	Fire District
County General	433,424,336	\$2,451,532.38	County General Townwide
Relevy School Tax		\$237,075.77	Relevy - RPT (School, City, Village, Town)
Town General & Hwy	435,767,697	\$1,544,364.10	Town General Townwide
Unpaid sewer	0	\$6,199.60	Relevy - User Fees
Unpaid water	0	\$14,568.40	Relevy - User Fees
<b>Total Amount Levied:</b>			<b>4,460,199.03</b>

The **Town/City Calculations** screen will allow users to view the calculations for each individual town or city (totals and components). Select the dropdown arrow next to the town, county or special district name to view all of the components included in the calculation.

**New York State Comptroller**  
**THOMAS P. DiNAPOLI** STAGING

Tax Data Verification

FYE 2017  
 County of ( )  
 Town of Co ( )  
 Examiner: ( )  
 Summary Sent to Respondent

VIEW  
 Home  
 Town/City Selection  
 Questionnaire  
 County Summary  
 Tax Roll Summary  
**Town/City Calculations**

### Town of ( ) Calculations

The following calculations are the totals that were generated from the tax roll data and information provided via the questionnaire. These totals are broken out by taxing district. You can click on the arrow to see the detail.

County Calculations						
Taxing District	Class Type	Amount Levied	Tax Rate	TAV	EQ Rate	Full Value
▼ ( )	County	\$445,551.13	5.80	69,089,904	0.9000	76,766,560
<b>Amount</b>		<b>Purpose Code</b>		<b>Purpose Description</b>		
445,551.13		P001		County General Townwide		

Town Calculations						
Taxing District	Class Type	Amount Levied	Tax Rate	TAV	EQ Rate	Full Value
▶ ( )	Town	\$382,341.99	4.99	68,985,568	0.9000	76,650,631

Town Calculations - Independent Special Districts						
Taxing District	Class Type	Amount Levied	Tax Rate	TAV	EQ Rate	Full Value
▶ ( )	Fire District	\$76,105.12	0.96	71,232,598	0.9000	79,147,331

[+ Show Other Data](#)

# Summary Approval

After reviewing the data, the town/city can approve the TDV summary or request that changes be made.

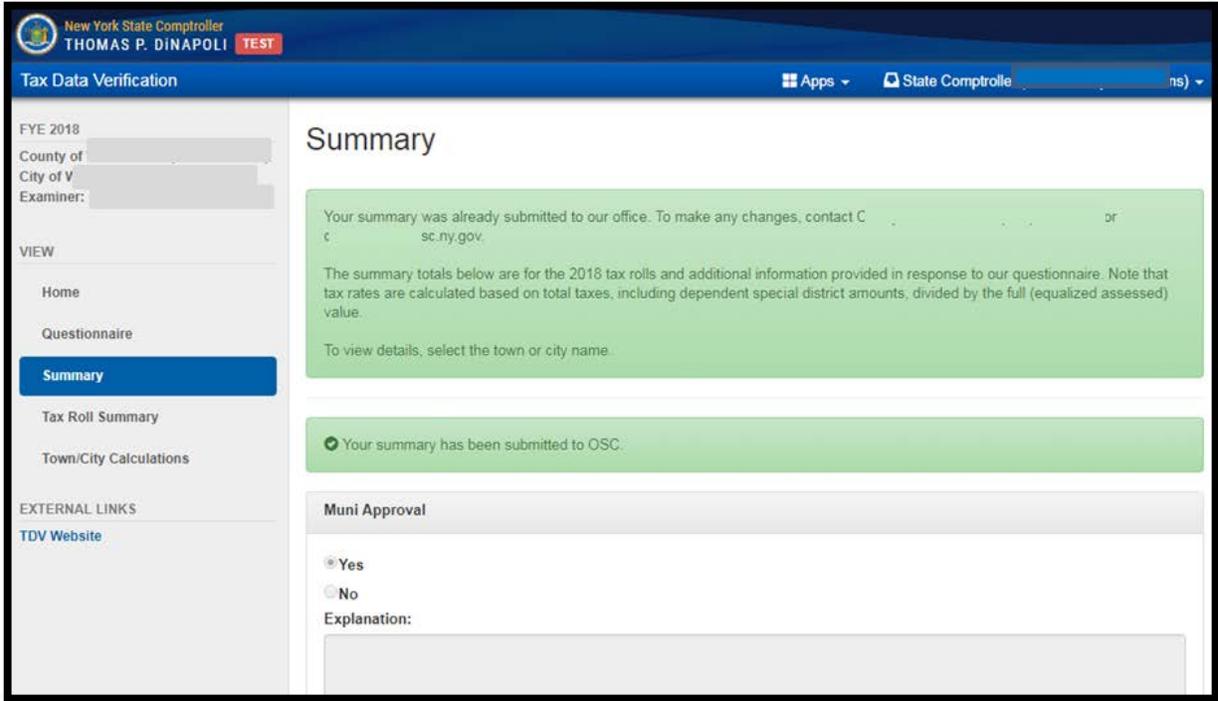
Under **Muni Approval**, users can

- Select **Yes** to approve, then select **Submit**
- Select **No** to disapprove, then enter an explanation for the disapproval.

Users can provide support or documentation in the event of approval or disapproval.

The screenshot displays the 'Muni Approval' section of the Tax Data Verification application. The interface includes a sidebar on the left with navigation links: Home, Town/City Selection, Questionnaire, and County Summary (highlighted). The main content area is titled 'Muni Approval' and features two radio buttons: 'Yes' (selected, indicated by a red arrow) and 'No'. Below the radio buttons is an 'Explanation:' text area. A file upload section is present with a 'File Upload' dropdown, a 'Choose File' button (showing 'No file chosen'), and an 'Upload' button. At the bottom of the main content area is a 'Files' table with columns for 'File Name', 'File Size', and 'Actions'. A 'Submit' button is located at the bottom left of the main content area, also indicated by a red arrow.

After submitting the Summary users will receive a notification that the summary has been submitted.



## Detailed Information on Questionnaire Topics:

**Tax Rolls:** Occasionally, OSC is not able to obtain tax rolls directly from the New York State Department of Taxation and Finance (NYSDF). In these cases, we request the missing tax rolls directly from a town or city. Filers can either upload a specific file or provide a website link containing the appropriate tax roll information.

Under the **Select type of attachment** drop down menu, filers have the following options:

- To add a URL link
  - Select **URL** and enter a URL website address.
  - Provide the URL in the space provided.



The screenshot shows a form titled "Select type of attachment:". A dropdown menu is set to "URL". Below it, a text input field contains "http://www.example.com", which is circled in red. At the bottom, there are buttons for "Cancel", "Save and Close", "Previous", and "Next".

- To attach a file
  - Select **File Upload**
  - Select **Choose File**. A pop-up window will appear.
  - Navigate to the file you want to upload from your computer
  - Select **Upload**.



The screenshot shows the same form with "File Upload" selected in the dropdown menu, also circled in red. Below it, the "Choose File" button is circled in red, with the text "No file chosen" next to it. An "Upload" button is visible below. At the bottom, there are buttons for "Cancel", "Save and Close", "Previous", and "Next".

Files		
File Name	File Size	Actions

## Assessed Values

If OSC does not have townwide taxable assessed values for town or county purposes, filers will be asked to provide the information. If the town has a village, enter the outside village and village area separately. Verify that the total of the two matches the townwide amount.

If the town does not have a village, enter the total townwide taxable assessed value.

**Assessed Values**

Provide the taxable assessed values for the following:

Town Taxable Assessed Value for M [redacted]

Town of M [redacted]

\$ 298389099

Village of M [redacted]

\$

## Split Lines

OSC will request the breakdown of a specific line on your tax roll if you bill out for multiple purposes on one line of the tax roll. The total amount billed on the tax roll will be displayed and filers are able to enter the amounts that were billed for the purposes identified.

- Select the drop down arrow next to the town or city name.
- Enter the individual amounts for the respective purposes.
- Select **Validate Totals** to check the amounts match the total amount on the Tax roll.
- If the totals do not match, a warning message will display and a correction should be made.

**Split Tax Lines**

Our analysis shows that taxes for different purposes are billed or reported on one line. To accurately calculate the taxes levied, enter the breakdown for the amounts below.

Enter the information and select **Validate Total** to ensure that the amounts entered match the total amount billed. When finished, select **Next** to continue with the questionnaire.

⚠ The City [redacted]'s responses equal \$0.00 instead of the total amount of \$15,495,007.24 which was billed on the tax roll. Verify that the information was entered correctly before proceeding.

City of [redacted] - XO - \$15,495,007.24

County of [redacted] - County Water Tax

\$

County of [redacted] - County General Townwide

\$

Cancel **Validate Totals** Save and Close Previous Next

If the totals match, filers will see the following message: "All responses add up to their tax line totals."  
Select **Next**.

**Split Tax Lines**

Our analysis shows that taxes for different purposes are billed or reported on one line. To accurately calculate the taxes levied, enter the breakdown for the amounts below.

Enter the information and select **Validate Total** to ensure that the amounts entered match the total amount billed. When finished, select **Next** to continue with the questionnaire.

✔ All responses add up to their tax line totals.

City of [redacted] - XO - \$15,495,007.24  
County of [redacted] - County Water Tax  
\$ 619,412

County of [redacted] - County General Townwide  
\$ 14,875,595.24

Cancel **Validate Totals** Save and Close Previous Next

### Omitted Taxes

Omitted Taxes (or prorated taxes) are several types of real property tax adjustments that are billed in a subsequent year, such as a change in property ownership that also changes the status of the property from exempt to non-exempt. If the town/city bills out omitted taxes for multiple local governments on one line of the tax roll, a breakdown between county, city, town and independent special districts is required for each omitted tax line item on the tax roll.

Select the dropdown arrow next to the name of your town/city and enter the breakdown for the omitted tax amount. Once all the breakdown amounts are entered, select **Validate Totals** to confirm that the total matches. A warning message will appear when the amounts entered do not match the total amount billed.

⚠ The Town of [redacted] responses equal \$262.82 instead of \$265.62

City of [redacted] - Omitted tax - county - \$2,805.20  
Town of [redacted] - Omitted tax - cty/tw - \$265.62  
County of [redacted] - Omitted Tax - Breakdown  
\$ 175.84

Town of [redacted] - Omitted Tax - Breakdown  
\$ 74.98

Village/School of Village/School - Omitted Tax - Breakdown  
\$

SPU - Library of [redacted] County Library District - Omitted Tax - Breakdown  
\$ 12

Town of Baldwin - Omitted tax - cty/tw - \$226.10

## **Extra Questions**

If OSC has any additional questions, they will be displayed here. Responses to additional questions can be entered into the provided field and supporting documents can be attached.

[How to attach a file](#)

### Extra Questions

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**Town of [REDACTED]**

Please provide additional documentation for your new water district.

[This is a test answer.](#)

Attach any supporting documents:  
Select type of attachment:

## **Additional Information**

Towns and cities can provide additional information, feedback and comments to OSC.

[How to attach a file](#)

### Additional Information

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Enter additional comments and attach any supporting documents below:

Any kind of additional information deemed necessary can be entered/attached.

Attach any supporting documents:  
Select type of attachment:

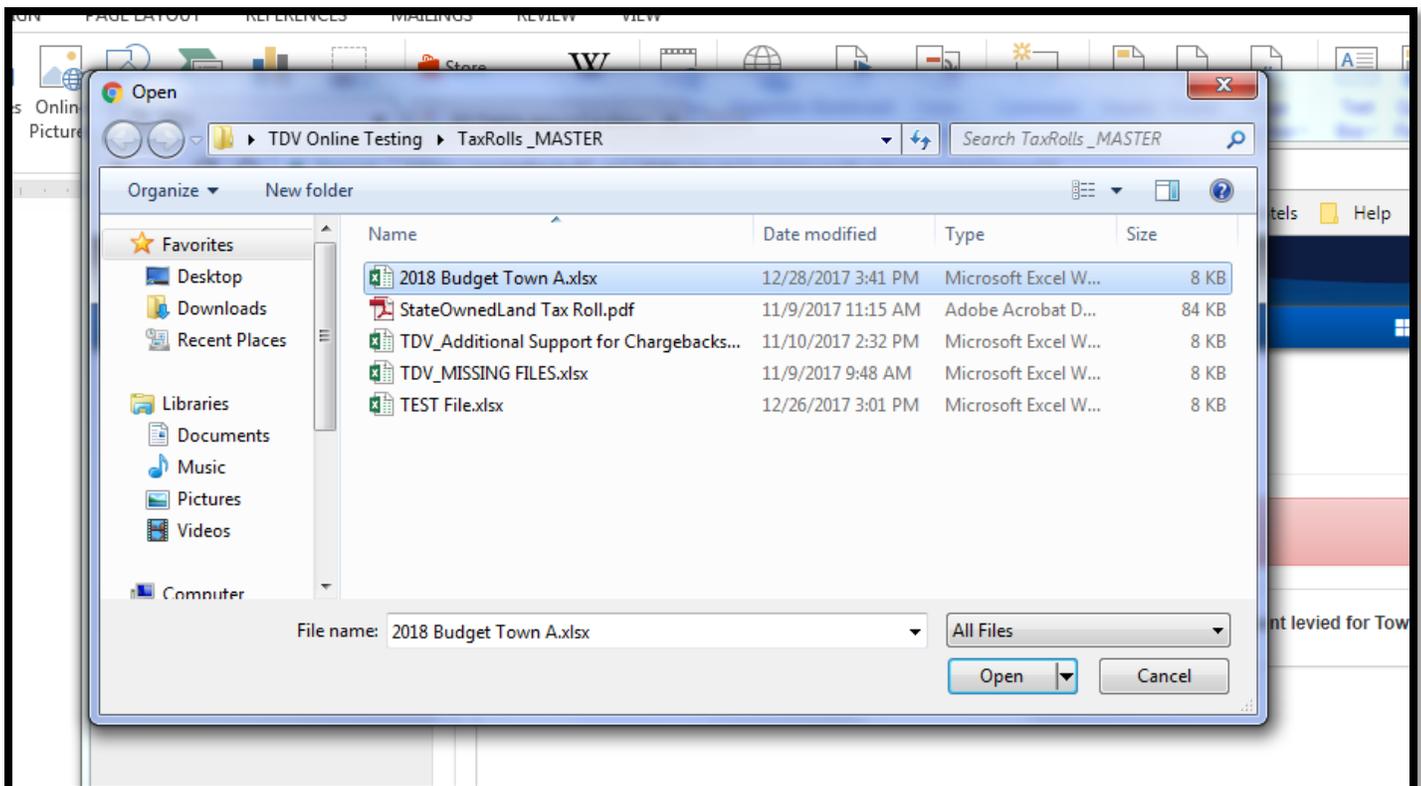
Select file:  
 No file chosen

## How to Attach a File

- o Select **File Upload** then **Choose File**.



- o After navigating to the file, select **Open** and **Upload**



- Select **Upload**.

Select type of attachment.

File Upload ▾

Select file:

Choose File 2018 Budget Town A.xlsx

Upload

- The file name will display after it has been uploaded. Repeat the process to upload additional files.
- Once finished, select **Next**.

Upload

Files

File Name	File Size	Actions
2018 Budget Town A.xlsx	7.49 KB	Delete

Cancel Save and Close Previous Next