

Office of the New York State Comptroller

Thomas P. DiNapoli • State Comptroller



Schedule of Real Property Taxes

Tax Data Verification Instructions

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 on how to access our online form.

File the tax data verification here:

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

Tax Rolls

Counties should provide New York State Taxation and Finance (NYSDF) with tax roll data extracts from the county tax roll software.

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

Send questions regarding submission of tax rolls to NYSDTF at 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 Tax Data Verification application](#)
2. [Completing your questionnaire](#)

a. Detailed Information on Questionnaire Topics

- | | | |
|---------------------------------------|--|---|
| i. Tax Rolls | v. Chargebacks | ix. Sales Tax |
| ii. Assessed Values | vi. Omitted Taxes | x. Payments to Reduce Taxes |
| iii. State-Owned Land | vii. Consolidated Health Districts (CHD) | xi. Extra Questions |
| iv. Split Lines | viii. Self-Insurance | xii. Additional Information |

OSC completes a secondary review of the information when the questionnaire is submitted. Then, 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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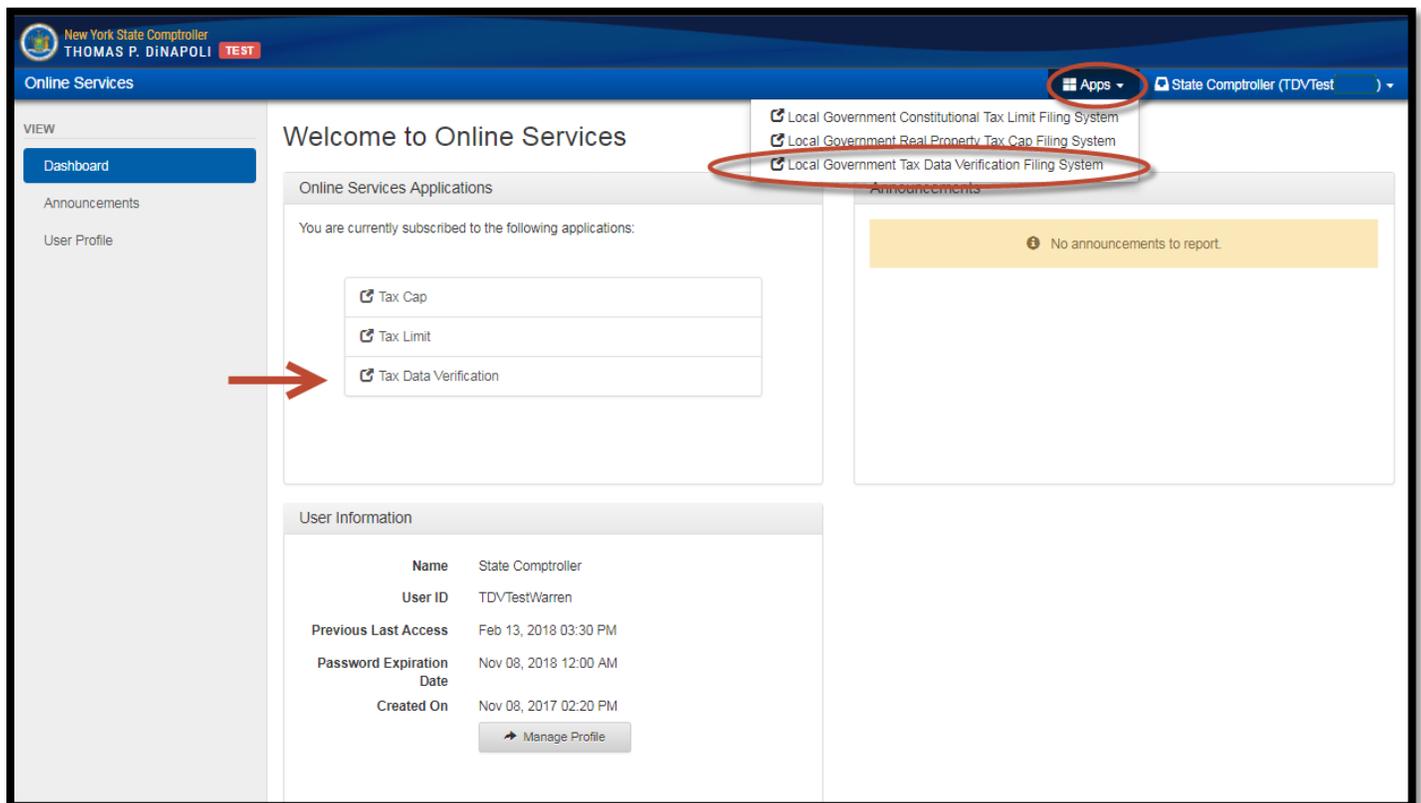
How to access the Tax Data Verification application

OSC uses the [Online Services portal](#) for the Tax Data Verification (TDV), Tax Cap and Constitutional Tax Limit filings. Each county has a designated TDV preparer in the online services system. The TDV preparer submits the questionnaire and the TDV approver approves the summary.

Filers also responsible for filing the Tax Cap form or the Constitutional Tax Limit form can use their current Online Services User ID and Password to access the TDV application. Officials wanting read-only access should contact the county CFO 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.

NEW YORK State Comptroller
THOMAS P. DiNAPOLI STAGING

Tax Data Verification Apps State Comptroller (TDVTestE)

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
2017	Open
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
2017	Open
2016	Closed
2015	Closed

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 county'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' application interface. At the top, it identifies the user as 'New York State Comptroller THOMAS P. DiNAPOLI' in a 'TEST' environment. The page title is 'Tax Data Verification' and the user is logged in as 'State Comptroller (TDVTest)'. On the left sidebar, the 'Questionnaire' button is highlighted. The main content area is titled 'Table of Contents' and features a red notification bar stating 'Your questionnaire hasn't been submitted.' Below this, instructions state: 'Provide the necessary information for each applicable questionnaire topic and submit the completed form with any supporting documentation. If you have questions, contact [redacted] at [redacted] or [redacted]@osc.state.ny.us.' A prompt asks the user to 'Choose a topic below or select the Start button to begin.' A table lists the following questionnaire topics: Missing Tax Rolls, Assessed Values, State-Owned Land, Split Lines, Chargebacks, Omitted Taxes, Consolidated Health Districts, Self-Insurance, Sales Tax Credit, Payments to Reduce Taxes, Extra Question, and Additional Information. A red arrow points to the 'Missing Tax Rolls' link. At the bottom right, a 'Start' button is also highlighted with a red arrow.

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.

[State-Owned Land](#) –State-Owned Land was not included in the RPS160 file provided to NYSDTF and we were not able to locate the tax rolls online. Supply a PDF copy of the state-owned land section.

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

[Chargebacks](#) – All counties will be asked to provide information about how chargebacks are handled. If a county imposes chargebacks on the taxing districts in the county, OSC will request additional information.

[Omitted Taxes](#) – Counties 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.

[Consolidated Health Districts \(CHD\)](#) – OSC will require more information from counties that levy for a CHD on the town or county tax line.

[Self-Insurance](#) - If OSC is aware that the County participates in self-insurance, counties will be asked for the amount billed. Filers should contact the assigned examiner if a county participates in self-insurance and did not receive this question.

[Sales Tax](#) - Towns can use a sales tax allocation as a credit against real property tax levied for a town or county purpose. All filers will be asked if the way they handle sales tax has changed.

[Payments to Reduce Taxes](#) - A town or city can make additional payments to reduce the county tax levy. OSC will ask all filers if they have made such payments.

[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.

Upon completion, filers will see a summary of entered information.

Filers should review their answers. If changes are required, choose **Cancel** to return to the table of contents. Select the appropriate topic to make changes. Filers can also select **Previous** and go back through each question to make changes.

Select **Submit Questionnaire** when finished.

The screenshot shows a web application interface for 'Tax Data Verification'. The header includes the New York State Comptroller logo and name 'THOMAS P. DiNAPOLI TEST'. The page title is 'Questionnaire Summary'. A red notification box contains instructions: 'Review this summary for accuracy and submit it to our office. The system has provided information to assist you in completing this form, but it's your responsibility to ensure that the information is accurate. All information entered has been saved. To make changes, select Cancel to return to the Questionnaire Topics. When finished, select Submit Questionnaire.' Below this is a 'Control Panel' with a 'Submit Questionnaire' button. A 'Responses' table is shown with one row of data. At the bottom are 'Cancel' and 'Previous' buttons.

FYE 2017
County of [REDACTED]
Examiner: [REDACTED]

VIEW
Home
Questionnaire

Questionnaire Summary

Review this summary for accuracy and submit it to our office. The system has provided information to assist you in completing this form, but it's your responsibility to ensure that the information is accurate.

All information entered has been saved. To make changes, select **Cancel** to return to the Questionnaire Topics.

When finished, select **Submit Questionnaire**.

Control Panel

Use the 'Control Panel' to change statuses/realms.

Submit Questionnaire

Responses

County	Town/City	Topic	Taxing District	Purpose	Amount Response	LGSA Amount Override	Text Response
[REDACTED]	[REDACTED]	Omitted Taxes	[REDACTED]	Omitted Tax - Breakdown	\$5,000.00	---	

Cancel Previous

Once submitted, no further action is necessary. OSC will contact filers with additional questions, requests for clarifications or with a summary notification that the review is complete.

The screenshot shows the 'Tax Data Verification' interface. The header includes the New York State Comptroller's logo and name, 'THOMAS P. DiNAPOLI', and a 'TEST' button. The main content area is titled 'Questionnaire Summary'. It features a green notification box stating: 'Your questionnaire has been submitted. If you need to make changes, contact [redacted] at [redacted] or [redacted]@osc.state.ny.us).'. Below this is another green box with a checkmark: 'The Questionnaire has been sent back to OSC.'. A 'Control Panel' section contains the text: 'Use the 'Control Panel' to change statuses/realms.'. The 'Responses' section contains a table with the following data:

County	Town/City	Topic	Taxing District	Purpose	Amount Response	LGSA Amount Override	Text Response
[redacted]		Additional Information	[redacted]		---	---	View Text

At the bottom of the table are 'Cancel' and 'Previous' buttons.

Review County Summary

OSC will send filers an e-mail notification when the "County 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.

VIEW

- Home
- Town/City Selection
- Questionnaire
- County Summary**

County Calculations					
Purpose Description	Total County Amounts	Town of [REDACTED]	Town of [REDACTED]	Town of [REDACTED]	Town of [REDACTED]
County					
County General Tax	\$32,272,670.36	\$2,451,532.38	\$849,518.95	\$4,539,055.12	\$1,168,276
Total County Levy	\$32,272,670.36	\$2,451,532.38	\$849,518.95	\$4,539,055.12	\$1,168,276
Taxable Assessed Value	No Value	\$439,424,336.00	\$35,359,529.00	\$25,006,114.00	\$153,639,660
Equalization Rate	No Value	1	0.234	0.03	0.7
Taxable Full Value	\$5,725,639,430.00	\$439,424,336.00	\$150,786,904.00	\$822,569,539.00	\$199,169,899
Full Value Tax Rate	\$5.64	No Value	No Value	No Value	No Va
Town					
Export to Excel					

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 Calculations					
Purpose Description	Total County Amounts	Town of [REDACTED]	Town of [REDACTED]	Town of [REDACTED]	Town of [REDACTED]
County					
County General Tax	\$32,272,670.36	\$2,451,532.38	\$849,518.95	\$4,539,055.12	\$1,168,276
Total County Levy	\$32,272,670.36	\$2,451,532.38	\$849,518.95	\$4,539,055.12	\$1,168,276
Taxable Assessed Value	No Value	\$439,424,336.00	\$35,359,529.00	\$25,006,114.00	\$153,639,660
Equalization Rate	No Value	1	0.234	0.03	0.7
Taxable Full Value	\$5,725,639,430.00	\$439,424,336.00	\$150,786,904.00	\$822,569,539.00	\$199,169,899
Full Value Tax Rate	\$5.64	No Value	No Value	No Value	No Va
Town					
Export to Excel					

There are two ways to look at detailed town and city information:

Option 1: Select the **Town/City Selection** in the navigation panel to view the tax roll information.

Option 2: Select the name of a town or city on the top row of the summary to view the totals and components of the taxes levied in each town or city.

Selecting **Town/City Selection** will provide a listing of all towns and cities located within the county.

Purpose Description	Total County Amounts	Town of [REDACTED]	Town of [REDACTED]	Town of [REDACTED]	Town of [REDACTED]
County					
County General Tax	\$32,272,670.36	\$2,451,532.38	\$849,518.95	\$4,539,055.12	\$1,168,27
Total County Levy	\$32,272,670.36	\$2,451,532.38	\$849,518.95	\$4,539,055.12	\$1,168,27
Taxable Assessed Value	No Value	\$439,424,336.00	\$35,359,529.00	\$25,006,114.00	\$153,639,66
Equalization	No Value	1	0.234	0.03	0

Select any town or city to view the respective **Tax Roll Summary**.

New York State Comptroller
THOMAS P. DINAPOLI TEST

Tax Data Verification

FYE 2017
County of [REDACTED]
Town of [REDACTED]
Examiner: [REDACTED]

Summary Sent to Respondent

Town/City Selection

To review the tax roll summary data, select a municipality below.

Select Town/City

Muni Name

Town of [REDACTED]

Town of [REDACTED]

Town of [REDACTED]

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.

Tax Lines

Select Purpose

Line Desc	TAV	Amount Levied	Purpose
[REDACTED] LIGHT	170	\$8,000.20	Town Lighting District
[REDACTED] Id	412,762,356	\$183,794.81	Fire District
[REDACTED] re dist	36,997,613	\$14,663.77	Fire District
County General	439,424,336	\$2,451,532.38	County General Townwide
Returned 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
Total Amount Levied:			4,460,199.03

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 Apps State Comptroller (TDVTes)

FYE 2017
 County of [REDACTED]
 Town of [REDACTED]
 Examiner: [REDACTED]
Summary Sent to Respondent

VIEW

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

Town of [REDACTED] 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
▼ [REDACTED]	County	\$445,551.13	5.80	69,089,904	0.9000	76,766,560

Amount	Purpose Code	Purpose Description
445,551.13	P001	County General Townwide

Town Calculations						
Taxing District	Class Type	Amount Levied	Tax Rate	TAV	EQ Rate	Full Value
> [REDACTED]	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
> [REDACTED]	Fire District	\$76,105.12	0.96	71,232,598	0.9000	79,147,331

[+ Show Other Data](#)

County Summary Approval

After reviewing the data, the county 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' interface within the 'Tax Data Verification' application. The header includes the New York State Comptroller logo and the name 'THOMAS P. DINAPOLI' with a 'TEST' indicator. The sidebar on the left shows the user's role as 'FYE 2017' and 'County of [redacted]', with a 'Summary Sent to Respondent' status. 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. The 'Select type of attachment:' section includes a 'File Upload' dropdown menu. The 'Select file:' section has a 'Choose File' button and the text 'No file chosen', along with an 'Upload' button. A table with columns 'File Name', 'File Size', and 'Actions' is present, but it is currently empty. At the bottom, a 'Submit' button is highlighted with a red arrow.

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

The screenshot shows the 'Tax Data Verification' application interface. At the top, it displays 'New York State Comptroller THOMAS P. DINAPOLI TEST'. The main header is 'Tax Data Verification' with navigation options for 'Apps' and 'State Comptroller (TDVTest)'. On the left, a sidebar shows 'FYE 2017' and 'County of [redacted]'. Below this, it says 'Examiner: [redacted]' and 'Summary Validation Received from Respondent'. A 'VIEW' menu includes 'Home', 'Town/City Selection', 'Questionnaire', and 'County Summary' (which is highlighted). The main content area is titled 'County Summary' and contains a green notification box stating: 'Your summary was already submitted to our office. To make any changes, contact [redacted] at ([redacted] or [redacted]@osc.state.ny.us). The summary totals below are for the [Current Form Year] tax rolls and additional information provided in response to our questionnaire. Note that tax rates are calculated based on total taxes, including dependent special district amounts, divided by the full (equalized assessed) value. To view details, select the town or city name.' Below the notification, a status bar indicates 'Statuses set to 'Secondary Review in Progress - Summary Validation Received from Respondent''. A 'Muni Approval' section has radio buttons for 'Yes' (selected) and 'No', followed by an 'Explanation:' text area.

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 county or town. City tax rolls represent most of the missing tax rolls. 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 dialog box for selecting the type of attachment. It features a dropdown menu labeled 'Select type of attachment:' with 'URL' selected. Below this is a text input field labeled 'Provide URL:' containing the text 'http://www.example.com', which is circled in red. At the bottom left are 'Cancel' and 'Save and Close' buttons, and at the bottom right are 'Previous' and 'Next' buttons.

- 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 type of attachment:
File Upload

Select file:
Choose File No file chosen

Upload

Files		
File Name	File Size	Actions

Cancel Save and Close Previous Next

- Select **Upload**.

Select type of attachment:
File Upload

Select file:
Choose File TDV_MISSING FILES.xlsx

Upload

Files		
File Name	File Size	Actions

Cancel Save and Close Previous Next

- The file name will display once it is uploaded. If necessary, repeat the process to upload additional files or select **Next**.

Select type of attachment:
File Upload ▼

Select file:
Choose File No file chosen

Upload

File Name	File Size	Actions
TDV_MISSING FILES.xlsx	7.87 KB	Delete

Cancel Save and Close Previous Next

- Notify OSC that you have provided files to NYSDTF
 - If OSC does not require override documents due to the file format, select **Submitted to Tax and Finance**
 - Enter date of submission.
 - Select **Next**.

Select type of attachment:
Submitted to Tax and Finance ▼

Date submitted to Tax and Finance:
mm/dd/yyyy

Cancel Save and Close Previous Next

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.

The screenshot shows a web application interface for entering assessed values. On the left is a sidebar with a 'VIEW' section containing 'Home' and a blue 'Questionnaire' button. The main content area is titled 'Assessed Values' and includes the instruction: 'Provide the taxable assessed values for the following:'. There are four sets of input fields, each for a different jurisdiction:

- County Taxable Assessed Value for [redacted]
County of [redacted]
\$ [input field]
- Town Taxable Assessed Value for [redacted]
Town of [redacted]
\$ [input field]
- County Taxable Assessed Value for [redacted]
County of [redacted]
\$ [input field]
- Village of [redacted]
\$ [input field]
- Town Taxable Assessed Value for [redacted]
Town of [redacted]
\$ [input field]
- Village of [redacted]
\$ [input field]

At the bottom left are 'Cancel' and 'Save and Close' buttons. At the bottom right are 'Previous' and 'Next' buttons.

State-Owned Land

If State-owned land information was not included in the RPS160 file provided to NYSDTF and OSC was not able to locate the tax rolls online, filers will be asked to provide this information. Provide the State-owned land section of the tax roll or the entire roll that contains the roll section 3 separately.

You will have the following options

- Provide a URL to allow OSC to view the tax rolls online.
- Provide a pdf version of the tax roll through **File Upload**.

[How to attach a file](#)

The screenshot displays the 'Tax Data Verification' portal for the New York State Comptroller, Thomas P. DiNapoli. The page is in a 'STAGING' environment. The main heading is 'State-Owned Land'. Below the heading, there is a message: 'The RPS160D1 files provided to New York State Department of Taxation & Finance didn't include the state-owned land sections of the tax roll.' This is followed by instructions: 'Upload the RPS155 PDF of the tax roll for each town/city in the County. If the tax rolls are available online, provide a link/URL.' A contact information line reads: 'If you have a problem providing these files, contact [redacted] at [redacted] or [redacted]@osc.state.ny.us.' The 'Select type of attachment:' dropdown menu is set to 'File Upload'. Below this, there is a 'Select file:' section with a 'Choose File' button and a 'No file chosen' label. The left sidebar shows 'FYE 2017', 'County of [redacted]', 'Examiner: [redacted]', and a 'Questionnaire Sent to Respondent' status. The 'VIEW' section includes 'Home' and a 'Questionnaire' button.

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.

New York State Comptroller
THOMAS P. DINAPOLI STAGING

Tax Data Verification

FYE 2017
County of [redacted]
Examiner: [redacted]
Questionnaire Sent to Respondent

VIEW
Home
Questionnaire

Split 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 Town of [redacted] responses equal \$0.00 instead of \$1,679,955.37

▶ Town of [redacted] Library Dist - \$1,679,955.37

Cancel Validate Totals Save and Close Previous Next

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.

⚠ The Town of [redacted] responses equal \$1,679,953.00 instead of \$1,679,955.37

▼ Town of [redacted] - \$1,679,955.37

SPU - [redacted] - Independent Library District
\$ 696,202

SPU - [redacted] Independent Library District
\$ 983,751

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**.

The screenshot shows a software interface with a green header bar containing a checkmark icon and the text "All responses add up to their tax line totals." Below this, there is a section for "Town of [redacted] - [redacted] Library Dist - \$1,679,955.37". Underneath, two "SPU - [redacted] - Independent Library District" entries are shown, each with a dollar sign icon and a text input field containing a numerical value: "696,204.37" and "983,751". At the bottom left, there are three buttons: "Cancel", "Validate Totals" (circled in red), and "Save and Close". At the bottom right, there are two buttons: "Previous" and "Next" (circled in red).

Chargebacks

Chargeback information is needed to determine the appropriate tax levy for each local government when the county imposes chargebacks on the taxing districts within their county.

Filers will be asked if the processes for handling chargebacks have changed.

If there are no changes to the process, select **No**. Select **Next**.

If there are changes to the way in which the local government recoups the costs, select **Yes** and provide an explanation. OSC will review the response and evaluate if further information is required.

In the event that a county does not impose taxes, no further information is required. Select **Next**.

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

Tax Data Verification Apps State Comptroller (TDVTest)

FYE 2017
County of [REDACTED]
Examiner: [REDACTED]
Questionnaire Sent to Respondent

VIEW
Home
Questionnaire

Chargebacks

Counties often provide services which they then charge back to municipalities. Counties have the option to bill municipalities for those services or add the amount of the charge to the county's levy within that municipality. Some counties add the cost to the town levy instead and these adjustments may require you to report additional information to us.

Your total chargeback amount is \$0.00

Have you changed the way you handle Chargebacks?

Yes
 No

Please explain...

Cancel Check Total Save and Close Previous Next

If a county imposed chargeback amounts in the past, provide the adjustments made for each local government listed. If the dependent district is not separately listed, such as a lighting district, the amount imposed will be included in the total town amounts. Do not enter any amounts that are added to the county levy or billed as a separate line on the tax roll. OSC is only interested in amounts that have been imposed.

Your total chargeback amount is \$0.00

Have you changed the way you handle Chargebacks?

Yes
 No

City of [REDACTED]
\$ [REDACTED]

Town of [REDACTED]
\$ [REDACTED]

Town of [REDACTED]
\$ [REDACTED]

After entering the chargeback amounts, select **Validate Total**. The system will display the total amount imposed at the top of the page. If there are no changes, select **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 county 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 drop down arrow for each local government to enter the omitted tax totals. Select **Validate Totals** to verify the allocations. Once all the breakdown amounts are entered, select **Validate Totals** to confirm that the totals match. A warning message will appear when the amounts entered do not match the total amount billed.

The screenshot shows a software interface for managing tax data. At the top, a yellow warning banner contains the text: "The Town of [redacted] responses equal \$262.82 instead of \$265.62". Below this, a list of tax items is displayed. The first item is "City of [redacted] - Omitted tax - county - \$2,805.20". The second item, "Town of [redacted] - Omitted tax - city/tw - \$265.62", is selected with a red circle around its dropdown arrow. Underneath, there are four breakdown sections, each with a dollar sign icon and a text input field: "County of [redacted] - Omitted Tax - Breakdown" with the value "175.84"; "Town of [redacted] - Omitted Tax - Breakdown" with the value "74.98"; "Village/School of Village/School - Omitted Tax - Breakdown" which is currently empty; and "SPU - Library of [redacted] Library District - Omitted Tax - Breakdown" with the value "12". At the bottom, the start of another item is visible: "Town of [redacted] - Omitted tax - city/tw - \$226.10".

A green highlighted area indicates that the breakdown amounts match the total omitted tax amount.

All responses add up to their tax line totals.

- > City of [REDACTED] - Omitted tax - county - \$2,805.20
- > Town of [REDACTED] - Omitted tax - cty/tw - \$265.62
- > Town of [REDACTED] - Omitted tax - cty/tw - \$226.10
- > Town of [REDACTED] - Omitted tax - cty/tw - \$2,691.92
- > Town of [REDACTED] - Omitted tax - cty/tw - \$3,475.19
- > Town of [REDACTED] - Omitted tax - cty/tw - \$889.66
- > Town of [REDACTED] - Omitted tax - cty/tw - \$568.24
- > Town of [REDACTED] - Omitted tax - cty/tw - \$734.94
- > Town of [REDACTED] - Omitted tax - cty/tw - \$9,570.20
- > Town of [REDACTED] - Omitted tax - cty/tw - \$6,758.65
- > Town of [REDACTED] - Omitted tax - cty/tw - \$1,919.86
- > Town of [REDACTED] - Omitted tax - cty-tw - \$2,547.10

Cancel Save and Close Previous

Consolidated Health Districts (CHD)

If the levy for an independent CHD was included in the county or town tax line on the tax roll, filers will see this topic. Enter the amount levied for each CHD. If a CHD was created or dissolved, contact the assigned examiner.

The screenshot displays the 'Tax Data Verification' interface for the New York State Comptroller, Thomas P. DiNapoli, in a 'STAGING' environment. The page title is 'Consolidated Health Districts'. On the left sidebar, it shows 'FYE 2017', 'County of [REDACTED]', and 'Examiner: [REDACTED]'. A green notification states 'Questionnaire Sent to Respondent'. Below this are 'VIEW' options: 'Home' and a blue 'Questionnaire' button. The main content area contains the following text: 'Provide the amount levied for each of the consolidated health districts listed below. If a consolidated health district was created or dissolved, contact [REDACTED] at [REDACTED] or [REDACTED]@osc.state.ny.us.' The form lists two districts: 'Laurens' with a value of '\$ 800' and 'Morris' with a value of '\$ 0'. At the bottom, there are 'Cancel', 'Save and Close', 'Previous', and 'Next' buttons.

Self-Insurance

If OSC is aware that a county is participating in self-insurance, the county will receive this question. If a county participates in self-insurance and does not receive this question, contact the assigned examiner.

- Has the County changed the way it handles self-insurance?
 - If **Yes**, explain the differences. OSC will determine if a follow-up conversation is necessary.

The screenshot shows a web application interface for "Tax Data Verification" by the New York State Comptroller, Thomas P. DiNapoli. The page is titled "Self-Insurance" and includes a sidebar with navigation options like "Home" and "Questionnaire". The main content area contains a question: "Have you changed the way you handle Self Insurance?" with radio buttons for "Yes" (selected) and "No". Below the question is a text input field labeled "Please explain...". At the bottom, there are buttons for "Cancel", "Save and Close", "Previous", and "Next".

New York State Comptroller
THOMAS P. DINAPOLI TEST

Tax Data Verification Apps State Comptroller (TDVTest)

FYE 2017
County of [REDACTED]
Examiner: [REDACTED]
Questionnaire Sent to Respondent

VIEW
Home
Questionnaire

Self-Insurance

Counties that administer self-insurance programs may need to provide additional information.

We currently show that the County participates in a self-insurance program.

Have you changed the way you handle Self Insurance?

Yes
 No

Please explain...

Cancel Save and Close Previous Next

- If **No**, provide the total amounts billed for self-insurance based on the way in which it was billed.

Have you changed the way you handle Self Insurance?

Yes

No

Adjusting Taxing District

\$

Billed

\$

Cancel Save and Close Previous Next

Sales Tax

Towns have the option to use their sales tax allocation as a credit against real property tax levied for town or county purposes.

If the process has changed, select **Yes** and enter an explanation.

We currently show that sales tax was used to reduce the county or town levy. Have you changed the way you handled sales tax this year?

Yes

No

Please explain...

Cancel Check Total Save and Close Previous Next

If sales tax was used to reduce a town or county levy historically, enter the sales tax amounts used to offset town or county tax levies for the current year.

Once complete, select **Check Total** to verify the total sales tax offset amount. Verify the total and select **Next**.

The screenshot shows a software interface with a sidebar on the left containing a 'Home' link. The main content area features a blue notification bar at the top stating 'Your total sales tax amount is \$55,858.74'. Below this, there are three input fields for payments to reduce taxes: 'Payments to Reduce County' with a value of \$48,858.74, 'Town of [redacted]' with a value of \$, and another 'Payments to Reduce County' with a value of \$7,000. At the bottom of the interface, there are navigation buttons: 'Cancel', 'Check Total', 'Save and Close', 'Previous', and 'Next'.

Payments to Reduce Taxes

A town or city can make additional payments to reduce the county tax levy. The County is required to report these amounts.

If the County received payments to reduce taxes

- Select **Yes** and enter the amounts paid by each town.
- Select **Check Total** and verify that the total is correct.
- Select **Next**.

Payments to Reduce Taxes

Law allows towns to make payments to offset the County levy for the taxpayers within the town.

i Your total payments to reduce taxes amount is \$600,000.00

Did a municipality make a payment to reduce county taxes?

Yes

No

City of [redacted]

Town of [REDACTED]

\$ 600,000

Town of [REDACTED]

Cancel **Check Total** Save and Close Previous Next

If no payments were made, select **No** and then select **Next**.

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](#)

New York State Comptroller
THOMAS P. DINAPOLI TEST

Tax Data Verification State Comptroller (TDVTest)

FYE 2017
County of [REDACTED]
Examiner: [REDACTED]

VIEW
Home
Questionnaire

Extra Question

We show an increase of \$100,000 in your Town A's general levy. Please confirm the 2018 amount levied for Town A was \$200,000. Please attach appropriate supporting documentation. Thanks.

Yes, the total amount levied fro Town A is \$200,000. Please see attachment: 2018 Town Budget

Attach any supporting documents below:
Select type of attachment:
File Upload

Additional Information

Every county can provide additional information, feedback and comments to OSC.

The screenshot shows a web application interface for 'Tax Data Verification'. At the top, there is a header with the New York State Comptroller logo and the name 'THOMAS P. DINAPOLI' next to a 'TEST' button. Below the header, the page title 'Tax Data Verification' is displayed on the left, and 'Apps' and 'State Comptroller (TDVTest)' are shown on the right. The main content area is titled 'Additional Information'. On the left side, there is a sidebar with 'FYE 2017', 'County of [REDACTED]', 'Examiner: [REDACTED]', and a green status bar that says 'Questionnaire Sent to Respondent'. Below this, there is a 'VIEW' section with 'Home' and a blue 'Questionnaire' button. The main content area contains a text box for entering comments, a 'Select type of attachment:' dropdown menu set to 'File Upload', and a 'Select file:' section with a 'Choose File' button and the text 'No file chosen'.

New York State Comptroller
THOMAS P. DINAPOLI TEST

Tax Data Verification Apps State Comptroller (TDVTest)

FYE 2017
County of [REDACTED]
Examiner: [REDACTED]
Questionnaire Sent to Respondent

VIEW
Home
Questionnaire

Additional Information

Enter additional comments and attach any supporting documents below:

A county can enter any additional information or feedback. File(s) or URL link can be attached below if necessary.

Select type of attachment:
File Upload

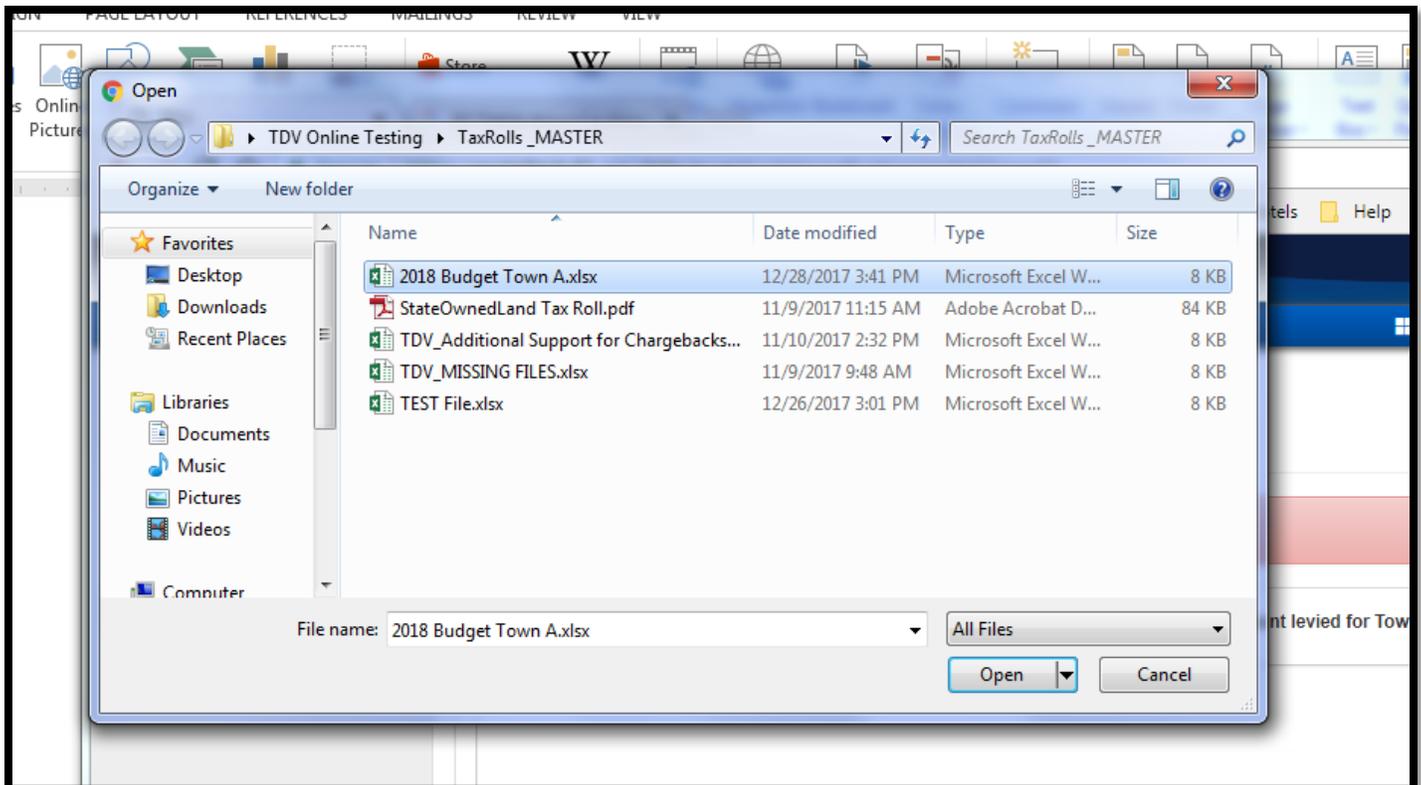
Select file:
Choose File No file chosen

How to Attach a File

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



- 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