

Property Tax Oversight OASYS eTRIM Taxing Authority Training

April-May 2024



Agenda

- Purpose of OASYS ePortal
- Review of OASYS ePortal Features
- Reminder about Contact and Access Managers
- Demonstration of OASYS eTRIM
- Review of Distributed Materials
- Reminder about OASYS ePortal Online Training Modules
- Q&A

OASYS

- **O**versight and **A**ssistance **S**ystem
- Powerful digital platform that streamlines workflows between Property Tax Oversight (PTO) employees and elected officials' offices across Florida.

OASYS ePortal Purpose

The OASYS ePortal is PTO's new online platform for digital communication with county offices:

- Property Appraisers
- Tax Collectors
- Taxing Authorities
- Clerks of Court

The ePortal serves as a single internet location where elected officials and their staff access applications and important information.

OASYS ePortal Features

Single sign on for all External PTO applications

- Phased roll out will ultimately transition all external applications to be accessed through the ePortal

Central location for PTO communications

- Messages provide consolidated reference point for all important information

OASYS ePortal user management

- Create users, remove users, and maintain contact information
- Elected officials are automatically granted permissions but may also delegate this access for their office

Application access

- Application access requests from an elected official or delegate must be approved by PTO before access is granted

OASYS ePortal Features

User logs into
OASYS ePortal

User can check
messages,
notifications,
important dates

User can access
specific
applications like
eTRIM

OASYS ePortal Contact and Access Managers

Contact Manager

- An office may select one or more staff members to be the contact manager.
- Contact managers can add, remove, and modify contact information for individual users and the office. They **CANNOT** request access to PTO applications for users.
- Other offices have granted this role to administrative assistants.

Access Manager

- An office may select one or more staff members to be the access manager.
- The access manager can perform all the tasks of the contact manager.
- Additionally, the access manager **CAN** request access to PTO applications for users as well as designate other contact and access managers.
- Other offices have granted this role to chief deputies, IT managers, and other supervisory roles.

OASYS eTRIM Purpose

OASYS eTRIM is an improved version of the former eTRIM application. The new version of the application will

- Allow taxing authorities to add, remove, and modify levies and Community Redevelopment Areas (CRAs) within the application
- Provide a more streamlined and efficient process for completing important TRIM forms
- Offer a more automated process for submitting TRIM packages for review

OASYS eTRIM is a robust application that PTO intends to continue to improve each year.

Annual Review

- Check existing levies and Community Redevelopment Areas
- Add a new levy, such as a debt
- Add a new Community Redevelopment Area
- Update a levy with an end date (final tax year)
- Uploading a *Certification for Taxing Authorities that Do Not Levy Ad Valorem Taxes* (Form DR-421) for a Do Not Levy

Submitting TRIM Forms

- *Certification of Taxable Value* (Form DR-420)
- *Tax Increment Adjustment Worksheet* (Form DR-420TIF)
- *Certification of Voted Debt Millage* (Form DR-420DEBT)
- *Maximum Millage Levy Calculation Preliminary Disclosure* (Form DR-420MMP)

Demonstration of OASYS eTRIM

Distributed Materials

- This PowerPoint Presentation
- OASYS ePortal User Guide

OASYS ePortal Online Training Modules

- Additional OASYS ePortal Training Modules can be found [here](#).



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