Property Appraiser User Guide

OASYS Truth in Millage

Florida Department of Revenue

Property Tax Oversight

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OASYS Truth in Millage Property Appraiser User Guide

Contents

1. Introduction

The Truth in Millage (TRIM) process informs taxpayers and the public about the legislative process by which local taxing authorities determine ad valorem (property) taxes. Florida state laws provide for public input and for governing bodies of taxing authorities to state specific reasons for proposed changes in taxes and the budget. When levying a millage, taxing authorities must follow chapter 200 of the Florida Statutes (F.S.), which governs TRIM. In 2007, the Florida Legislature revised those statutory requirements to provide maximum millage rates for non-voted levies of counties, municipalities, and independent special districts. Chapter 200, F.S., and Chapter 12D-17, Florida Administrative Code (F.A.C.), state the specific requirements for TRIM compliance. Please consult the Florida Statutes before acting.

The Oversight and Assistance System electronic portal (OASYS ePortal) is Property Tax Oversight's (PTO) online workspace and platform for communication with county offices, including property appraisers, tax collectors, and taxing authorities.

The OASYS eTRIM (electronic Truth in Millage) application within the OASYS ePortal offers an electronic platform for property appraisers, taxing authorities, and PTO to perform required TRIM duties. In this application, taxing authorities may create new or modify existing levies and Community Redevelopment Areas (CRAs). The application also provides an efficient environment for taxing authorities and property appraisers to complete required TRIM forms and allows taxing authorities to electronically submit TRIM packages for PTO review.

Refer to this user guide for assistance with navigating and using the OASYS eTRIM system. This document will be updated as more functionality is added to the application.

According to Florida law, failure to meet TRIM requirements results in the loss of ad valorem taxes collected in excess of the rolled-back rate and state revenue sharing funds unless the taxing authority remedies the non-compliance.

Glossary of Role Definitions for the TRIM application

- **User Primary with Certification** - User will be able to enter data on the TRIM forms and certify them.
- **User Primary** - User will be able to enter data on the TRIM forms, but not certify them.
- **User Backup** - User will be able to enter data on the TRIM forms, but not certify them. They also will not receive notification emails.
- **View Only** - User will only be able to view the application, but not be able to update information.

- **View Only with Notifications** - This is like the **View Only** role. However, the user will receive notifications from the system.

Glossary of Important TRIM Terms and Forms

Adjusted millage – adjustment of the final millage rate(s) calculated on Form DR-422, line 3.

Aggregate millage – overall millage rate used to determine an overall rate for principal taxing authorities with dependent districts.

Dependent district – district that is governed by the governing body of the county or municipality.

Final millage – millage adopted at the final budget hearing.

Independent – special district that is not a dependent district of a county special district or municipality.

Maximum millage – the maximum millage rate allowed by vote.

Millage cap – the maximum millage rate allowed by law.

MSTU – Municipal Service Taxing Unit. Counties may establish municipal service taxing or benefit units for any part or all of the unincorporated area of the county. These may provide fire protection; law enforcement; beach erosion control; recreation service and facilities; water; alternative water supplies, including, but not limited to, reclaimed water and water from aquifer storage and recovery and desalination systems; streets; sidewalks; street lighting; garbage and trash collection and disposal; waste and sewage collection and disposal; drainage; transportation; indigent health care services; mental health care services; and other essential facilities and municipal services from funds derived from service charges, special assessments, or taxes within such unit only.

Other voted millage – millage rate approved by referendum.

Taxing authority – includes, but is not limited to, any county, municipality, authority, special district, or other public body of the state, any school district, library district, neighborhood improvement district created pursuant to the Safe Neighborhoods Act, metropolitan transportation authority, municipal service taxing or benefit unit (MSTU or MSBU), or water management district.

Proposed millage – the millage rate necessary to fund the proposed budget (on DR-420).

Rolled-back rate – the rate that would generate prior year tax revenues less allowances for new construction, additions, deletions, annexations, and improvements, increasing value by at least 100% and tangible personal property value in excess of 115% of the previous year's value.

Tentative millage – the proposed millage rate adopted at the initial TRIM hearing (appears in the budget summary advertisement).

TRIM – Truth in Millage establishes the statutory requirements that all taxing authorities levying a millage must follow, including all notices and budget hearing requirements.

VAB – Value Adjustment Board. The purpose of the value adjustment board (VAB) is to hear appeals regarding property value assessments, denied exemptions or classifications, ad valorem tax deferrals, portability decisions, and change of ownership or control. Taxpayers or their representatives file petitions with the VAB clerk in the county where the property is located.

DR-420 – *Certification of Taxable Value* (Form DR-420); proposed millage rates.

DR-420S – *Certification of School Taxable Value* (Form DR-420S); proposed millage rates or the millage rates considered by a taxing authority pursuant to Sections 200.065(2)(a)1. and (2)(b), F.S., to fulfill the tentative budget.

DR-420DEBT – *Certification of Voted Debt Millage* (Form DR-420DEBT).

DR-420MM – *Maximum Millage Levy Calculation, Final Disclosure* (Form DR-420MM).

DR-420MMP – *Maximum Millage Levy Calculation, Preliminary Disclosure* (Form DR-420MMP).

DR-420TIF – *Tax Increment Factor Adjustment Worksheet* (Form DR-420TIF).

DR-422 – *Certification of Final Taxable Value* (Form DR-422); final adopted millage rates.

DR-422DEBT – *Certification of Final Voted Debt Millage* (Form DR-422DEBT).

DR-421 – *Certification for Taxing Authorities that Do Not Levy Ad Valorem Taxes* (Form DR-421).

DR-487 – *Certification of Compliance* (Form DR-487); list of compliance requirements.

DR-487V – *Voting Record for Final Adoption of Millage Levy* (Form DR-487V).

Important TRIM Dates

July 1 - Last day for the property appraiser to certify the DR-420 series forms.

July 1 – 31 - The board of county commissioners' (BOCC) budget officer delivers a tentative budget to the board.

August 4 - Last day for taxing authorities to certify DR-420, DR-420MMP, and any additional forms to the property appraiser.

**August 24** - Last day the property appraiser can mail TRIM notices to property owners.

September 3 – 18 - The time in which regular taxing authorities must hold their hearings on tentative budget and proposed millage rate. This is the final hearing period for school districts.

September 18 – October 3 - The taxing authority must advertise its intent to adopt a final millage rate and budget within this period.

- The taxing authority must hold the public hearing to adopt the final millage rate and budget 2-5 days after the advertisement appears in the newspaper.

- The taxing authority must send the resolution or ordinance adopting the final millage rate to the property appraiser, tax collector, and PTO within three days after the final hearing.

- Within three days after the taxing authority receives the **DR-422** (and possibly **DR-422DEBT**), the taxing authority completes and certifies the final millage rates to the property appraiser.

2. Accessing the Electronic Truth in Millage (eTRIM) Application

2.1 From your **OASYS ePortal Dashboard**, locate the **Your Applications** section.

2.2 Click **Truth in Millage Rewrite**.
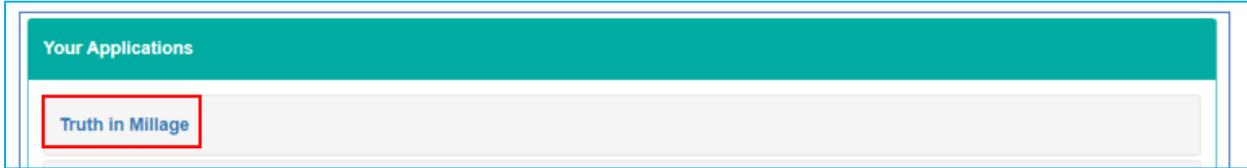

2.3 The **eTRIM Dashboard** displays.
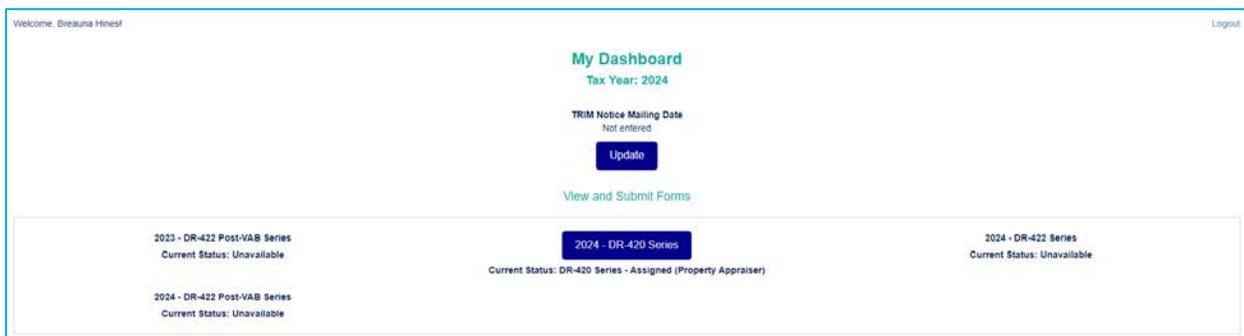
3. Accessing the DR-420 Series Forms

All taxing authorities within the property appraiser's county must first complete the annual review process for the property appraiser staff to view the DR-420 series forms. The annual review process opens for taxing authorities in January each year. It requires the taxing authorities to review, modify, and possibly close out existing levies and community redevelopment areas (CRAs). During this process, a taxing authority may add newly established levies or CRAs. Taxing authorities submit their levies and CRAs for review and approval by PTO's TRIM team.

3.1   Until all taxing authorities in a county complete the annual review process, a message like the one below displays for the county's property appraiser on their **eTRIM Dashboard**.

3.2   Once the annual review process is complete for all taxing authorities in a county, the property appraiser will receive an email notification. The property appraiser may log into the application, click the current tax year's **DR-420 Series** button, and view a table of all taxing authorities and their levies and CRAs.

3.3   The property appraiser may view all form lists for details about the levies within their county and click the **Accept DR-420 Series** button when they are ready to begin their portion of the of the DR-420 Series forms.
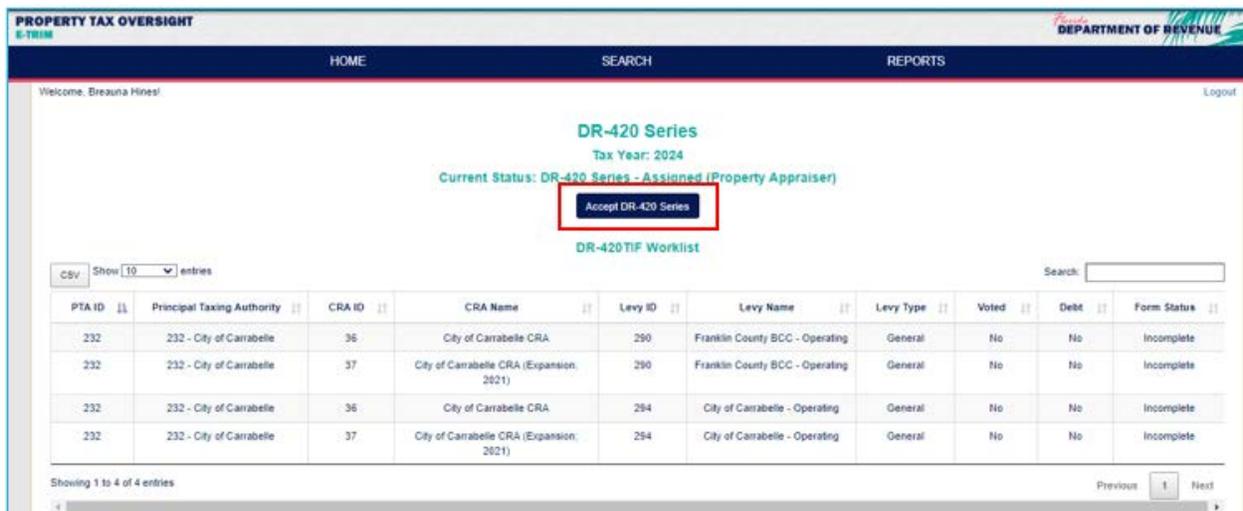
3.4 The appropriate forms display on the property appraiser's dashboard as worklists. These worklists are grouped by form type.

3.5 The property appraiser may choose to batch upload or manually enter data into their section of the DR-420 Series forms.

4. Completing the DR-420 Series Forms via Batch Upload

4.1   If completing the **DR-420 Series** via batch upload, click the **Batch Upload** button on your dashboard.

To batch upload the data for your county, please click the Batch Upload button below to navigate to the batch upload page. Then follow the on-screen instructions to upload your completed file to the system.

Batch Upload

4.2   The **Batch Upload** screen displays the following:

- **Tax Year** (**a**). This field should display the current tax year.
- **County Name** (**b**). This field displays your county's number and name.
- **File Type** (**c**). This field displays the type of forms to upload. When you first access the system, you will only be able to select DR-420. After the DR-420 series is certified, you will be able to select DR-422.
- **Choose File to Upload** (**d**). Click the **Choose File** button to select the appropriate file to upload. Please note that the system requires a .TXT or .CSV file and does not accept any other file types.

Batch Upload

a Tax Year: 2024

b County Name: 16 - Broward

c File Type: ● DR420

d Choose File To Upload: Choose File   No file chosen

Upload

4.3   Each form is associated with a **Record Type** that must be included in the file that you upload. This ensures that data is uploaded to the appropriate form. The **Record Type** numbers for each form are:

- **DR-420** = **1**
- **DR-420TIF** = **2**
- **DR-420DEBT** = **3**
- **DR-420S** = **4**

4.4   Property appraisers must prepare Form DR-420, Section I data for all principal taxing authorities, dependent special districts, and Municipal Service Taxing Units (MSTUs) within their county.

4.5 If there is a water management district in your county, you must also prepare Form DR-420, Section I data for any basin the district levies within your county.

4.6 **Appendix 1** includes a file format for each form type. The document in the appendix includes headers showing the order of the data. However, the .CSV or .TXT file that you upload must not contain headers.

4.7 When uploading data for Form DR-420, your .TXT or .CSV file should include the **County ID (a)**, **Record Type (b)**, **Levy ID (c)**, **Real Property (d)** value, **Personal Property (e)** value, **Centrally Assessed (f)** value, **Net New Taxable Value (g)**, and **Prior Year Final Gross Taxable (h)** value. The values must be entered in this order and there should be no headers, as shown in the example file below.

a	b	c	d	e	f	g	h
66,	1,	2003,	236261000000,	9332068492,	100937958,	3640986130,	220053000000
66,	1,	808,	763265270,	327680019,	3856673,	2756750,	994731162
66,	1,	810,	615061540,	0,	0,	5687110,	536207830
66,	1,	282,	667801440,	52104570,	1108912,	5432100,	671174289
66,	1,	811,	1062704760,	26646348,	0,	45340,	944236507
66,	1,	1996,	2290497610,	170464756,	196652,	50717598,	2200969075
66,	1,	929,	237325596910,	9332068492,	100937958,	3641395940,	221086972034

4.8 Property appraisers must also prepare Form DR-420TIF, Section I data for all tax increment financing areas in the county. These forms are completed for **Community Redevelopment Areas (CRAs)**.

4.9 If multiple levies within the taxing authority contribute to the tax increment financing area, the property appraiser should prepare Form DR-420TIF data for each levy that contributes.

4.10 You may prepare data for the DR-420TIF forms in the same .TXT or .CSV file, or in a separate file. This file should include the **County ID (a)**, **Record Type (b)**, **Levy ID (c)**, **CRA ID (d)**, **Current Year Taxable Value (e)**, **Base Year Taxable Value (f)**, and **Prior Year Final Taxable Value (g)**. Only enter values in this order with no headers as shown in the example file below.

a	b	c	d	e	f	g
66,	2,	808,	4,	60605107,	5171742131,	220053000000
66,	2,	2003,	4,	60605107,	5171742131,	220053000000
66,	2,	2003,	5,	763265270,	327680019,	994731162
66,	2,	810,	5,	763265270,	327680019,	994731162
66,	2,	2005,	5,	763265270,	327680019,	994731162

4.11 Property appraisers must also prepare Form DR-420DEBT, Section I data for all voted debt service millages and millages voted for two years or less.

4.12 You may prepare data for the DR-420DEBT forms in the same .TXT or .CSV file, or in a separate file. This file should include the **County ID (a)**, **Record Type (b)**, **Levy ID (c)**, **Real Property (d)** value, **Personal Property (e)** value, and **Centrally Assessed (f)** value. Only enter values in this order with no headers as shown in the example file below.

a	b	c	d	e	f
66,	3,	2004,	236261000000,	9332068492,	100937958

4.13 Property appraisers must also prepare Form DR-420S, Section I data for the school district in their county.

4.14 You may prepare data for Form DR-420S in the same .TXT or .CSV file, or in a separate file. This file should include the **County ID (a)**, **Record Type (b)**, **Levy ID (c)**, **Real Property (d)** value, **Personal Property (e)** value, **Centrally Assessed (f)** value, **Net New Taxable Value (g)** and **Prior Year Final Gross Taxable Value (h)**. Only enter values in this order with no headers as shown in the example file below.

a	b	c	d	e	f	g	h
66,	4,	802,	236261000000,	9332068492,	100937958,	3640986130,	220053000000

4.15 You may prepare multiple files as shown in previous examples. Alternatively, you may prepare one file with all form data for your county as shown in the example below.

```
66,   1,    2003,  236261000000,  9332068492,   100937958,    3640986130,   220053000000
66,   1,    808,   763265270,     327680019,    3856673,      2756750,      994731162
66,   1,    810,   615061540,     0,      0,    5687110,      536207830
66,   1,    282,   667801440,     52104570,     1108912,      5432100,      671174289
66,   1,    811,   1062704760,    26646348,     0,      45340,  944236507
66,   1,    1996,  2290497610,    170464756,    196652, 50717598,      2200969075
66,   1,    929,   237325596910,  9332068492,   100937958,    3641395940,   221086972034
66,   4,    802,   236261000000,  9332068492,   100937958,    3640986130,   220053000000
66,   2,    808,   4,             60605107,     5171742131,   220053000000
66,   2,    2003,  4,             60605107,     5171742131,   220053000000
66,   2,    2003,  5,             763265270,    327680019,    994731162
66,   2,    810,   5,             763265270,    327680019,    994731162
66,   2,    2005,  5,             763265270,    327680019,    994731162
66,   3,    2004,  236261000000,  9332068492,   100937958
```

4.16 After selecting the file you wish to upload, click the **Upload** button. You may upload multiple times, if necessary.

Upload
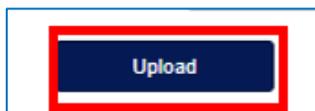
5. Manually Completing the DR-420 Series Forms

5.1 If completing the DR-420 Series manually, access the forms from the worklists on your dashboard.

5.2 Worklists are based on information provided by the taxing authorities during the **Annual Review Process**. This process is described in detail in the **OASYS Truth in Millage Taxing Authority User Guide**.

5.3 For example, you will see a **DR-420S** worklist for the school district in your county. You may also see a **DR-420TIF** worklist if any taxing authorities in your county indicated that they have a **Community Redevelopment Area (CRA)**.

5.4 Each worklist, excluding the **DR-420TIF** worklist, displays the **Principal Taxing Authority** name, **Levy ID**, **Levy Name**, **Form Type**, and **Form Status**. There is also an **Action** column where you may access the form.

5.5 The **DR-420TIF** worklist displays the **CRA Name**, **CRA ID**, **Principal Taxing Authority** identification number and name, and **Form Status**. Like the other form types, there is an **Action** column where you may access the form.

5.6 Forms in this series may be in the following statuses:

- **Not Started** (**a**). You have not entered any data.
- **Complete** (**b**). All data is entered, and all fields passed validation.
- **Validation Failed** (**c**). The form did not pass validation.
- **Returned** (**d**). There were changes to another form that impacted a calculated value on the form.

The following sections include examples of each type of DR-420 Series forms.

6. Manually Completing Form DR-420

6.1 Property appraisers must complete a Form DR-420 for all principal taxing authorities, dependent special districts, and Municipal Service Taxing Units (MSTUs) within their county.

6.2 If there is a water management district in your county, you must also complete a Form DR-420 for any basin the district levies within your county.

6.3 To access the Form DR-420 for a specific levy, click the **View/Edit** button next to the name of the levy in your **DR-420 Worklist**.

6.4 Locate Section I of the form to view fields that are either calculated by the system or require manual data entry.

- **1. Current year taxable value of real property for operating purposes** (**a**).
- **2. Current year taxable value of personal property for operating purposes** (**b**).
- **3. Current year taxable value of centrally assessed property for operating purposes** (**c**).
- **4. Current year gross taxable value for operating purposes** (**d**). This is a system calculated field containing the sum of **Lines 1**, **2**, and **3**.
- **5. Current year net new taxable value** (**e**). Property appraisers must enter the result of adding 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, and then subtracting deletions.
- **6. Current year adjusted taxable value** (**f**). This is a system calculated field subtracting **Line 5** from **Line 4**.
- **7. Prior year FINAL gross taxable value from prior year applicable Form DR-403 series** (**g**).

- **8. Number of TIF Work Sheets** (**h**). If there are tax increment financing areas in the taxing authority indicated during the annual review process, the system calculates the number of DR-420TIF forms required from the property appraiser and taxing authority. If there are no tax increment financing areas, the system displays 0.
- **9. Number of DEBT Work Sheets** (**i**). If the taxing authority levies a voted debt service millage or a millage voted for two years or less and indicates this during the annual review process, the system calculates the number of DR-420DEBT forms that are required from the property appraiser and taxing authority. If there are no debt levies, the system displays 0.

		Section I - Completed by Property Appraiser
a	1.	Current year taxable value of real property for operating purposes:
b	2.	Current year taxable value of personal property for operating purposes:
c	3.	Current year taxable value of centrally assessed property for operating purposes:
d	4.	Current year gross taxable value for operating purposes:
e	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.)
f	6.	Current year adjusted taxable value:
g	7.	Prior year FINAL gross taxable value: (From prior year applicable Form DR-403 series)
h	8.	Number of TIF Work Sheets:
i	9.	Number of DEBT Work Sheets:

6.5   After completing the required fields, scroll to the bottom of the form.

6.6   The form displays the following options:

- **Cancel** (**a**) – Cancel any new, unsaved, manually entered data.
- **Save and Recalculate** (**b**) – Save manually entered data and display calculated values in appropriate fields without closing the form.
- **Save and Close** (**c**) – Save data, close the form, and return to your worklists.

a	**b**	**c**
Cancel	Save and Recalculate	Save and Close
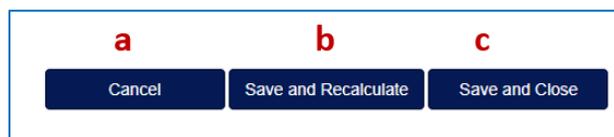
7. Manually Completing Form DR-420S

7.1 Property appraisers must also complete a Form DR-420S for the school district in their county.

7.2 To access Form DR-420S, click on the **View/Edit** button next to the name of the levy under your **DR-420S Worklist**.
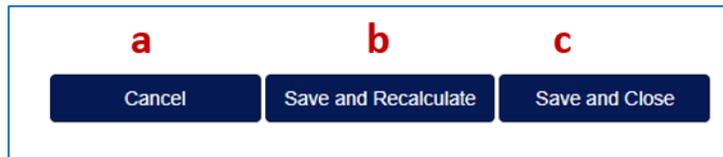

7.3 Locate Section I of the form to view fields that are either calculated by the system or require manual data entry.

- **1. Current year taxable value of real property for operating purposes** (**a**)
- **2. Current year taxable value of personal property for operating purposes** (**b**)
- **3. Current year taxable value of centrally assessed property for operating purposes** (**c**)
- **4. Current year gross taxable value for operating purposes** (**d**) This is a system calculated field containing the sum of **Lines 1**, **2**, and **3**.
- **5. Current year net new taxable value** (**e**) Property appraisers must enter the result of adding 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, and then subtracting deletions.
- **6. Current year adjusted taxable value** (**f**) This is a system calculated field subtracting **Line 5** from **Line 4**.
- **7. Prior year FINAL gross taxable value** (**g**) This is from the prior year applicable Form DR-403 series.
- **8. Number of DEBT Work Sheets** (**h**) If the taxing authority indicated a debt during annual review, the number of debt worksheets required displays here. If there are no debt levies, the system displays 0.

Section I - Completed by Property Appraiser

a	1.	Current year taxable value of real property for operating purposes:
b	2.	Current year taxable value of personal property for operating purposes:
c	3.	Current year taxable value of centrally assessed property for operating purposes:
d	4.	Current year gross taxable value for operating purposes:
e	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.)
f	6.	Current year adjusted taxable value:
g	7.	Prior year FINAL gross taxable value: (From prior year applicable Form DR-403 series)
h	8.	Number of DEBT Work Sheets:

7.4 After completing the required fields, scroll to the bottom of the form.

7.5 The form displays the following options:

- **Cancel** (**a**) – Cancel any new, unsaved, manually entered data.
- **Save and Recalculate** (**b**) – Save manually entered data and display calculated values in appropriate fields without closing the form.
- **Save and Close** (**c**) – Save data, close the form, and return to your worklists.

a	**b**	**c**
Cancel	Save and Recalculate	Save and Close

8. Manually Completing Form DR-420DEBT

8.1   Property appraisers must also complete a Form DR-420DEBT for all voted debt service millages and millages voted for two years or less in their county.

8.2   To access the Form DR-420DEBT for a specific levy, click the **View/Edit** button next to the name of the levy in your **DR-420DEBT Worklist**.
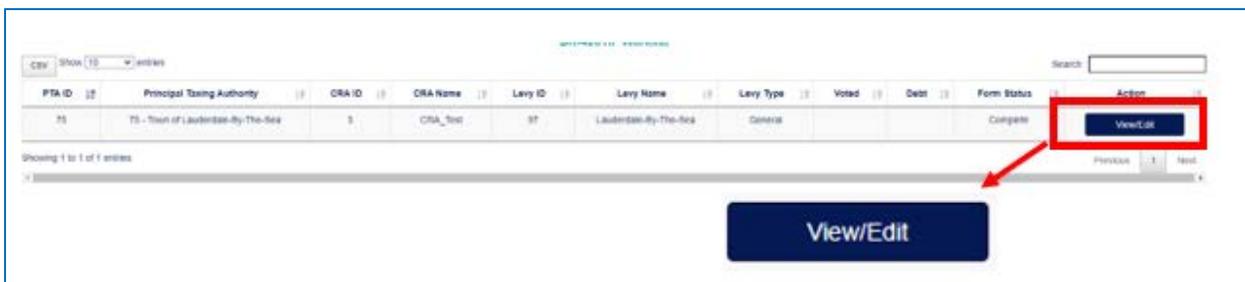

8.3   Locate Section I of the form to view fields that are either calculated by the system or require manual data entry.

- **1. Current year taxable value of real property for operating purposes** (**a**)
- **2. Current year taxable value of personal property for operating purposes** (**b**)
- **3. Current year taxable value of centrally assessed property for operating purposes** (**c**)
- **4. Current year gross taxable value for operating purposes** (**d**) This is a system-calculated field containing the sum of **Lines 1**, **2**, and **3**.

8.4   After completing required fields, scroll to the bottom of the form.

8.5   The form contains the following options:

- **Cancel** (**a**) – Cancel any new, unsaved, manually entered data.
- **Save and Recalculate** (**b**) – Save manually entered data and display calculated values in appropriate fields without closing the form.
- **Save and Close** (**c**) – Save data, close the form, and return to your worklists.
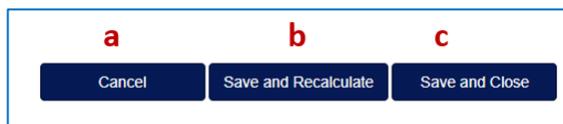
9. Manually Completing Form DR-420TIF

9.1 Property appraisers must also complete a Form DR-420TIF for all tax increment financing areas in the county. These may also be referred to as **Community Redevelopment Areas (CRAs)**.

9.2 If multiple levies within a taxing authority contribute to a tax increment financing area, then there should be a Form DR-420TIF for each levy that contributes.

9.3 Tax increment financing areas cannot span multiple counties. The area must be confined to a single county.

9.4 To access the Form DR-420TIF for a specific levy, click the **View/Edit** button next to the name of the levy under your **DR-420TIF Worklist**.

9.5 Locate Section I of the form to view fields that are either calculated by the system or require manual data entry.

- **1. Current year taxable value in the tax increment area** (a)
- **2. Base year taxable value in the tax increment area** (b)
- **3. Current year tax increment value** (c) This is a system calculated field subtracting **Line 2** from **Line 1**.
- **4. Prior year Final taxable value** (d)
- **5. Prior year tax increment value** (e) This is a system calculated field subtracting **Line 2** from **Line 4**.

9.6   After completing the required fields, scroll to the bottom of the form.

9.7   The form displays the following options:

- **Cancel** (**a**) – Cancel any new, unsaved, manually entered data.
- **Save and Recalculate** (**b**) – Save manually entered data and display calculated values in appropriate fields without closing the form.
- **Save and Close** (**c**) – Save data, close the form, and return to your worklists.

a   **b**   **c**

| Cancel | Save and Recalculate | Save and Close |
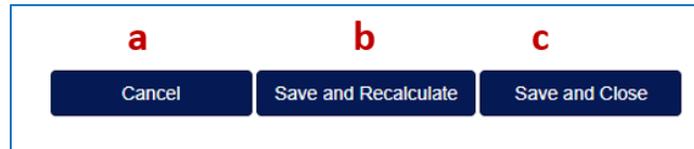
10. Reviewing and Certifying the DR-420 Series Forms to the Taxing Authorities

10.1 Once all forms are complete, you can review saved form data by clicking the **View/Edit** button next to the form you wish to review.

10.2 After ensuring that all form data is accurate, return to your dashboard.

10.3 Click the **Certify All** button. Only the user with **User Primary with Certification access to OASYS eTRIM** can certify forms.

10.4 Clicking **Certify All** electronically signs the forms. You will see this message after clicking the **Certify All** button.
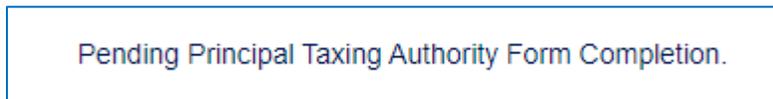
10.5 The taxing authority contacts should receive an email notification to complete **Section II** of each applicable form.

11. Reviewing and Accepting the DR-420 Series from the Taxing Authorities

11.1 When the taxing authorities have completed Section II of each applicable DR-420 Series form and certified the forms back to the property appraiser, you will receive an email stating that the form data is ready to review.

11.2 After logging into your OASYS ePortal account, click on the appropriate **DR-420 Series** button from your dashboard.

11.3 A list of taxing authorities in your county that have completed their section of the **DR-420** series displays.

11.4 View the data entered by clicking **View Submission**.

11.5 The **Submission Details** screen displays. View forms for the specific levy to check the data that was manually entered or batch uploaded.

11.6 Click the button for the form that you wish to view.

11.7 You will now see data in Section II of whichever form you select. These data fields will be grayed out, and you will not be able to enter data for them.

11.8   The example below is from Section II of a Form DR-420:

11.9   If you observe any discrepancies, please email PTO's TRIM team at TRIM@floridarevenue.com so they can determine if any forms need to be unlocked.

11.10   After ensuring all form data is correct, return to the DR-420 Series screen.

11.11   Click the **Accept** button next to the taxing authority whose DR-420 series you wish to accept.

11.12   Once forms for all taxing authorities are selected, you will be able to move on to entering your TRIM notice mailing date and completing the DR-422 Series. More instructions on the DR-422 Series will be added as that functionality is finalized in the system.

Appendix 1. Property Appraiser Batch Upload File Format

The below is a sample file format that property appraisers can use as a guideline from the Excel spreadsheet "Property Appraiser Batch Upload Template with Headers". Remember to provide your actual data, remove the headers, and convert the file to .CSV or .TXT. The headers are included in this example to show you the order of the data for each form type.

Form DR-420 File Format

CountyId	RecordType	LevyId	Real Property Value (420 line 1)	Personal Property Value (420 line 2)	Centrally Assessed Property Value (420 line 3)	Net New Taxable Value (420 line 5)	Prior Year Final Gross Taxable Value (420 line 7)
28	1	277	275889138	70493398	0	4732946	321778731

Form DR-420DEBT File Format

CountyId	RecordType	LevyId	Real Property Value (420 debt line 1)	Personal Property Value (420 debt line 2)	Centrally Assessed Property Value (420 debt line 3)
28	3	278	291631838110	10623595161	102993118

Form DR-420 S File Format

CountyId	RecordType	LevyId	Real Property Value (420 S line 1)	Personal Property Value (420 S line 2)	Centrally Assessed Property Value (420 S line 3)	Net New Taxable Value (420 S line 5)	Prior Year Final Gross Taxable Value (420 S line 7)
28	4	279	16216954683	527167888	1853919	724572535	15121263694

Form DR-420TIF File Format

CountyId	RecordType	Levy ID	CraID	Current Year Taxable Value (420 TIF line 1)	Base Year Taxable Value (420 TIF line 2)	Prior Year Final Taxable Value (420 TIF line 5)
16	2	219	452	12225377	5213466	6462830