



# Assessment Portal

## User Guide

Municipal Connect™ 2.0  
**November 29, 2018**

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## Assessment Portal

Municipal Connect 2.0 provides assessment-related information, and helps manage your assessment base with tools such as: Dashboard Analytics, Property Monitoring, RfR and Appeals Dashboard, Reports, and an advanced Search function

Users have access to detailed property level information (limited to municipal jurisdiction), which can be exportable into Excel.

Use of this information is governed by the Municipal License Agreement, and access is granted by the local Municipal Connect 2.0 Administrator.

## Roles and Responsibilities

### Municipal Administrator

The maintenance of People Portal municipal user profiles is the responsibility of the Municipal Administrator designated by the municipality. This individual is the only one authorized to create, edit and delete municipal user profiles.

When a municipal user profile is being created, or edited by the local Municipal Administrator, they should always be aware of the terms of use, as well as, the terms and conditions of the Municipal License Agreement, paying particular attention to Section 3 of the Agreement, whereby:

*The information contained in this product (the “Information”) is provided “as is” by the Municipal Property Assessment Corporation (“MPAC”) to the municipality (the “Institution”). The Institution assumes all risks and liabilities from the use of the information, and may only use the Information for internal planning purposes or the issuing of tax bills in accordance with the Municipal License Agreement and applicable Product Use Sheets entered into by MPAC and the Institution.*

### Compliance Governor

With the added functionality of access to people information within the system and on the products that can be exported, MPAC has established an added level of security to ensure Municipal Connect 2.0 usage and the further use of the data is compliant with all relevant statutory and regulatory requirements.

Depending on each municipality, the same person may assume the role of both municipal administrator and compliance governor. Given that the Municipal Clerk’s role is already one of

governing compliance with various statutory and regulatory requirements, in order to ensure appropriate use of the Municipal Connect 2.0 application and personal data provided therein, MPAC believes as a best practice the Municipal Clerk take on the role of compliance governor.

### Municipal Connect User

Each individual user is responsible for their appropriate access and use of MPAC data in accordance with the Terms of Use and Municipal License Agreement.

### Privacy Disclaimer

Both municipal users and MPAC are subject to the requirements contained in the *Municipal Freedom of Information and Protection of Privacy Act* (MFIPPA). Unauthorized use of personal information by MPAC or any other institution governed by the MFIPPA, including all Ontario municipalities, is prohibited by MFIPPA.

In addition, the use of the all data within Municipal Connect 2.0 is regulated by the provisions contained in the Municipal License Agreement, and additional licensing considerations through MPAC's data sharing agreement with Teranet.

Under Municipal Connect 2.0 Terms and Conditions, municipalities are ultimately responsible for managing their own data governance.

If you are unclear about whether your use meets the terms and conditions, please contact your Municipal Clerk or your local MPAC Municipal and Stakeholder Relations team.

### Logging On

- Each municipality has a local administrator who creates and edits user profiles.
- Choose the Forgot Password? Link to complete the reset process.
- Users can repeat a password after three consecutive password changes.
- Once username and password are entered, users are presented with the Home Page.
- To log out, or change password, choose the arrow to the right of the username on the menu bar.

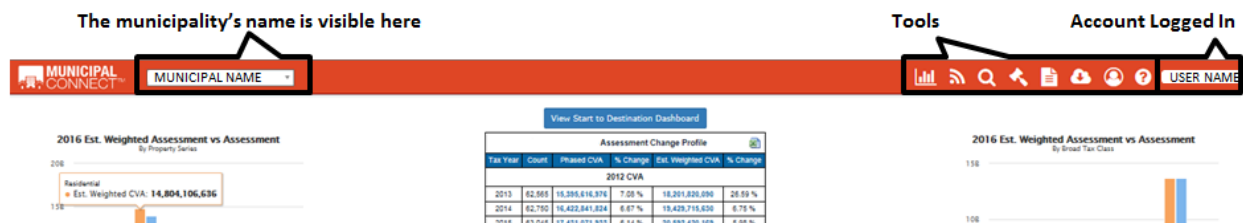
#### PLEASE NOTE:

- Acknowledging terms and conditions is now required on every login.

- Identical credentials may no longer be used concurrently. If a user logs in with identical credentials as another user who is already logged in, the first user is disconnected. This warns the first user that someone else is using their credentials.

## Navigating the Tool Bar

Municipal Connect contains toolbar items, allowing for efficient access to assessment data.



## Icons

|  |  |
|--|--|
|  | <b>Dashboard Analytics</b> displays the municipality's roll, with the ability to drill right down to the properties that feed into the summaries.  |
|  | <b>Property Monitoring</b> provides a quick view of the Municipality's portfolio and enables the user to monitor properties via a custom Watch List  |
|  | <b>Property Search</b> provides a number of approaches to look for individual properties, or groups of properties that meet a user defined criteria. Different filter sets are available by property type. |
|  | <b>Appeals and Request for Reconsideration Dashboard</b> offers the user a better understanding of assessment at risk.   |
|  | <b>Reports</b> will provide access to the Municipal Change Profile data file and summary reports.  |
|  | <b>Compliance Information</b> provides the resources necessary to provide awareness of the terms & conditions of use, related to the Municipal Licence Agreement   |
|  | <b>Help</b> contains access to user guide, FAQ's Terms & Conditions and the Privacy Statement.   |

## Getting to Know the Property Level

### Orientation

Click on any blue highlighted roll number on any screen in Municipal Connect to access the property level view. A new browser tab (window) opens.

1

2017 - June 3

Map 4 Satellite

Layers Aerial

CURRENT ASSESSMENT ACTIVITY DOCUMENTS

PROPERTY REPORT

Property Description 2

Units 5 Structures

| Imp. # | Year Built | Year Reno | Class | # Storeys | Unit Type | Unit Code | Year Built | Year Reno | Class | # Storeys | Occ. Code | Occupancy Type | GLA                  |        |
|--------|------------|-----------|-------|-----------|-----------|-----------|------------|-----------|-------|-----------|-----------|----------------|----------------------|--------|
| 1      | 1965       | 1977      | C     | 7         | Office    | 0         | 1          | 1965      | 1977  | C         | 7         | 820            | Office Second and Up | 91,522 |
| 2      | 1965       | 1977      | C     | 7         | Office    | 0         | 2          | 1965      | 1977  | C         | 7         | 800            | Office Basement      | 4,464  |
| 3      | 1965       | 1977      | C     | 7         | Office    | 0         | 3          | 1965      | 1977  | C         | 7         | 810            | Office First Floor   | 15,364 |
|        |            |           |       |           |           |           |            |           |       |           |           |                | 111,350              |        |

Mailing Address

200 MCINTYRE ST W

### Key Benefits

- Contains all property-specific information, including sub-tabs for assessment cycle information, activity (appeals/RFR's, events and sales), and documents (see sub-tab information below)
- Select, customize, download and view a PDF version of the property level information by selecting the Property Report button at the right of the screen.
- Toggle between Map and Satellite view, look at vintage Aerial and Google Street Views (where available) and turn layers on and off to see Property Type, Parcel Ownership, Assessment and Roll Number overlaid on the selected parcel.

### Functionality

The main feature of the Property Level view is that it contains all property-specific information: Property Description, Mailing Address and a listing of all units and/or structures on the

### Sub-tabs

| CURRENT       |            | ASMT       |         | ACTIVITY          |        | DOCUMENTS     |       | PROPERTY REPORT |            |                   |        |               |       |            |            |                   |        |               |       |            |            |                   |        |        |
|---------------|------------|------------|---------|-------------------|--------|---------------|-------|-----------------|------------|-------------------|--------|---------------|-------|------------|------------|-------------------|--------|---------------|-------|------------|------------|-------------------|--------|--------|
| 2013 Tax Year |            |            |         |                   |        | 2014 Tax Year |       |                 |            |                   |        | 2015 Tax Year |       |            |            |                   |        | 2016 Tax Year |       |            |            |                   |        |        |
|               | Dest.      | Phased     | Change  | Est. Weighted CVA | Change |               | Dest. | Phased          | Change     | Est. Weighted CVA | Change |               | Dest. | Phased     | Change     | Est. Weighted CVA | Change |               | Dest. | Phased     | Change     | Est. Weighted CVA | Change |        |
| E             | 9,821,000  | 9,821,000  | 0.00 %  |                   | 0      | 0.00 %        | E     | 9,821,000       | 9,821,000  | 0.00 %            | 0      | 0.00 %        | E     | 9,821,000  | 9,821,000  | 0.00 %            | 0      | 0.00 %        | E     | 9,821,000  | 9,821,000  | 0.00 %            | 0      | 0.00 % |
| 2017 Tax Year |            |            |         |                   |        | 2018 Tax Year |       |                 |            |                   |        | 2019 Tax Year |       |            |            |                   |        | 2020 Tax Year |       |            |            |                   |        |        |
|               | Dest.      | Phased     | Change  | Est. Weighted CVA | Change |               | Dest. | Phased          | Change     | Est. Weighted CVA | Change |               | Dest. | Phased     | Change     | Est. Weighted CVA | Change |               | Dest. | Phased     | Change     | Est. Weighted CVA | Change |        |
| E             | 13,848,000 | 10,827,750 | 10.25 % |                   | 0      | 0.00 %        | E     | 13,848,000      | 11,834,500 | 9.30 %            | 0      | 0.00 %        | E     | 13,848,000 | 12,841,250 | 8.51 %            | 0      | 0.00 %        | E     | 13,848,000 | 13,848,000 | 7.84 %            | 0      | 0.00 % |

**New!** – Sales Tab now includes previous owner name.

CURRENT

ASMT

ACTIVITY

DOCUMENTS

PROPERTY REPORT

Appeal / RFR

Events

Sales

Sale History

| Date        | Amount | Code | Type               | Instrument # |
|-------------|--------|------|--------------------|--------------|
| Dec-01-2014 | \$1    | 19C  | Other - Commercial | BS131054     |

|                                     |      |                            |                      |                 |
|-------------------------------------|------|----------------------------|----------------------|-----------------|
| CURRENT                             | ASMT | ACTIVITY                   | DOCUMENTS            | PROPERTY REPORT |
| Property Documents                  |      |                            |                      |                 |
| Name                                |      | Description                |                      |                 |
| Valuing Office Buildings in Ontario |      | Methodology Guide          | <a href="#">View</a> |                 |
| Office Market Valuation Report      |      | Market Valuation Report    | <a href="#">View</a> |                 |
| Property Assessment Notice          |      | Property Profile 9/14/2016 | <a href="#">View</a> |                 |

This includes roll number, civic address, municipality, legal description, owner name, property code, zoning designation, whether the property has municipal services (water/sewer, etc.) or not, total site area (acreage), type of site access, property frontage and depth, destination CVA, tenant tax liability (if applicable), and farm operation code (if applicable). At this property level view, the mailing address is also visible.



### **Google Street View Imagery:**

The latest version of Google Street View imagery is presented here (if available). If vintages of Street View are available, they can be selected via the drop-down menu in the upper left of the picture.

### **Map & Satellite View:**

Toggle between the map and the latest Google Satellite view. The Layers menu on the right, may also be used to toggle on and off municipal boundaries, property types, parcel ownership, assessment parcel layer and the roll number to display them.

### **Units & Structures:**

Includes number of improvements, year built, year renovated, construction class, number of storeys, unit type and number of units. Occupancy code, occupancy type and gross lease area (GLA Sq. Ft.) are also visible under Structures.

The Property View tab/screen can be closed at any time.


### **Tips and Tricks**

- Unit and structure data may be downloaded directly to Excel by clicking the icon in the table header.
- Click the 'Add to Watch List' text in the orange header bar of the Property Level View to find properties again that are queried often (see: Watchlist feature for more details).
- Maps and Google Street View images may be navigated by clicking and holding and dragging the cursor over them.

## **Tour of Each Tool**

### **Dashboard Analytics**

#### **Orientation**

Click on the  icon to view the assessment change profile. This dashboard tracks year-over-year change and the current in-year changes, through graphs and a central interactive table.



## Key Benefits

- Contains two different databases: *Phased CVA* and *Estimated Weighted CVA*.
- View and sort Assessment under *Phased CVA* by Property Series and further by property code
- View and sort Assessment under *Estimated Weighted CVA* by Realty Tax Class (RTC) and further by Realty Class Qualifier (RTQ). Control Totals Report is also found here.
- Ability to drill down to an individual roll and the Property Detail View with the option to print a detailed report.

## Functionality

The main feature of the Dashboard Analytics tool is the central table that provides users with the Tax Year, Property Count, Phased CVA, percent Change, and Estimated weighted CVA, and Percent Change.

Users may click on the blue hyperlinks under Phased CVA and Estimated Weighted CVA to view specific information by Tax Year.

### *Phased CVA*

Clicking the Phased CVA for Tax Year 2017 results in a finer table with a breakdown by Property Type:

| - Assessment by Series 2017 In-Year |                 |       |                |         |                   |         |
|-------------------------------------|-----------------|-------|----------------|---------|-------------------|---------|
| Series                              | Property Type   | Count | Phased CVA     | Change  | Est. Weighted CVA | Change  |
| 10                                  | LAND            | 7736  | 566,059,889    | -1.58 % | 498,952,778       | -2.88 % |
| 200                                 | FARM            | 700   | 113,519,796    | 2.92 %  | 92,559,954        | 2.91 %  |
| 300                                 | RESIDENTIAL     | 52510 | 14,109,851,557 | 0.58 %  | 14,634,257,169    | -0.05 % |
| 400                                 | COMMERCIAL      | 1313  | 1,635,759,751  | 0.10 %  | 3,317,499,879     | -2.81 % |
| 500                                 | INDUSTRIAL      | 780   | 901,059,518    | -0.06 % | 2,173,460,385     | -2.59 % |
| 600                                 | INSTITUTIONAL   | 139   | 980,400,434    | 1.25 %  | 239,576,196       | 1.12 %  |
| 700                                 | SPECIAL PURPOSE | 245   | 200,312,587    | 1.15 %  | 83,620,150        | 0.16 %  |
| 800                                 | GOVERNMENT      | 28    | 10,944,750     | 0.97 %  | 9,049,849         | 2.71 %  |
|                                     |                 | 63451 | 18,517,908,282 | 0.49 %  | 21,048,976,360    | -0.80 % |

Clicking on a Property Type (ex: LAND) will result in a finer table with a breakdown by Property Code:

| - 2017 In-Year Assessment by Property Code |                           |       |             |          |                   |           |
|--|---------------------------|-------|-------------|----------|-------------------|-----------|
| Prop. Code                                 | Description               | Count | Phased CVA  | Change   | Est. Weighted CVA | Change    |
| 100  | Residential Land          | 5181  | 292,049,812 | -2.54 %  | 195,594,397       | -3.73 %   |
| 101  | Vacant Lot                | 5     | 505,500     | -25.14 % | 413,500           | -29.10 %  |
| 102  | Conservation Land         | 75    | 2,207,300   | -4.35 %  | 1,947,625         | -5.26 %   |
| 103  | Municipal Park            | 77    | 16,919,000  | 0.00 %   | 100,750           | 0.00 %    |
| 105  | Commercial Land           | 220   | 43,572,701  | 0.56 %   | 65,420,673        | -3.27 %   |
| 106  | Industrial Land           | 181   | 37,378,545  | 0.03 %   | 60,324,401        | -2.59 %   |
| 107  | Provincial park           | 6     | 4,102,125   | 0.00 %   | 6,941,940         | 0.00 %    |
| 110  | Residential Land          | 676   | 82,442,218  | -0.93 %  | 69,589,281        | -1.12 %   |
| 111  | Island                    | 52    | 3,278,300   | -0.45 %  | 776,200           | -1.87 %   |
| 112  | Multi-Res Land            | 1     | 421,750     | -23.91 % | 919,415           | -17.24 %  |
| 115  | Redevelopment             | 4     | 3,831,250   | 0.00 %   | 8,198,875         | -3.17 %   |
| 120  | Water Lot                 | 10    | 85,100      | 0.00 %   | 79,126            | -1.82 %   |
| 125  | Res. Development Land     | 88    | 38,137,800  | -1.21 %  | 37,358,320        | -1.26 %   |
| 130  | Non-Buildable Land        | 800   | 7,786,263   | -0.94 %  | 2,837,533         | -0.49 %   |
| 134  | Open Space                | 6     | 179,825     | 0.00 %   | 51,950            | 0.00 %    |
| 140  | Common land               | 3     | 0           |          | 0                 | -100.00 % |
| 150  | Mining lands - patented   | 297   | 27,917,025  | 1.78 %   | 41,395,847        | -1.94 %   |
| 151  | Mining lands - unpatented | 33    | 2,846,125   | -14.62 % | 5,847,945         | -8.28 %   |
| 155  | Land - Power Dam          | 5     | 1,244,250   | 0.00 %   | 0                 |           |
| 169  | Vacant land condo (res.)  | 16    | 1,155,000   | 0.00 %   | 1,155,000         | 0.00 %    |
|  |                           | 7736  | 566,059,889 | -1.58 %  | 498,952,778       | -2.88 %   |

Clicking on the Description (Ex: VACANT LOT) results in a listing of properties by roll number (information is concealed below for training purposes):

| - 2017 In-Year Property Listing |             |            |              |              |            |           |         |            |                   |           |
|---------------------------------|-------------|------------|--------------|--------------|------------|-----------|---------|------------|-------------------|-----------|
| Tax Year                        | Roll Number | Address    | Municipality | Prop. Series | Prop. Code | Site Area | RTC/RTQ | Phased CVA | Est. Weighted CVA | Dest. CVA |
| 2017                            | XXXXXXXXXX  | XXXXXXXXXX | XXXXXXXXXX   | LAND         | 101        | 0.349     | RT      | 107,750    | 107,750           | 131,000   |
| 2017                            |             |            |              | LAND         | 101        | 1.820     | RT      | 83,750     | 83,750            | 104,000   |
| 2017                            |             |            |              | LAND         | 101        | 0.272     | RT      | 122,000    | 122,000           | 122,000   |
| 2017                            |             |            |              | LAND         | 101        | 0.394     | RT      | 100,000    | 100,000           | 100,000   |
| 2017                            |             |            |              | LAND         | 101        | 0.500     | E       | 92,000     | 0                 | 95,000    |

Clicking on a roll number brings the user to the final Property View (see previous section in this Guide), where property-specific information is available.

### Estimated Weighted CVA

| - Assessment Change Profile |        |                |          |                   |          |
|-----------------------------|--------|----------------|----------|-------------------|----------|
| Tax Year                    | Count  | Phased CVA     | % Change | Est. Weighted CVA | % Change |
| 2012 CVA                    |        |                |          |                   |          |
| 2013                        | 62,565 | 15,395,616,976 | 7.08 %   | 18,201,820,090    | 26.59 %  |
| 2014                        | 62,750 | 16,422,841,824 | 6.67 %   | 19,429,715,630    | 6.75 %   |
| 2015                        | 63,045 | 17,431,071,933 | 6.14 %   | 20,592,420,169    | 5.98 %   |
| 2016                        | 63,216 | 18,423,059,084 | 5.69 %   | 21,759,810,559    | 5.67 %   |
| 2016 CVA                    |        |                |          |                   |          |
| 2017                        | 63,378 | 18,426,823,486 | 0.02 %   | 21,218,345,574    | -2.49 %  |
| 2017 In-Year Change Profile |        |                |          |                   |          |
| 2017                        | 63,451 | 18,517,908,282 | 0.49 %   | 21,048,976,360    | -0.80 %  |
| 2018                        | 63,451 | 18,911,421,377 | 2.13 %   | 21,559,285,084    | 2.42 %   |
| 2019                        | 63,451 | 19,304,934,297 | 2.08 %   | 22,069,592,973    | 2.37 %   |
| 2020                        | 63,451 | 19,698,447,156 | 2.04 %   | 22,579,901,640    | 2.31 %   |

Clicking the Estimated Weighted CVA for Tax Year 2017 results in a finer table with a breakdown by Realty Tax Class (RTC):

| - 2017 In-Year Assessment by RTC |                       |                |         |                   |         |
|----------------------------------|-----------------------|----------------|---------|-------------------|---------|
| RTC                              | Description           | Phased CVA     | Change  | Est. Weighted CVA | Change  |
| C                                | Commercial            | 1,381,339,836  | -0.75 % | 2,882,389,245     | -3.76 % |
| D                                | Office                | 126,368,919    | 0.86 %  | 277,348,621       | 0.16 %  |
| E                                | Exempt                | 1,413,569,338  | 0.83 %  | 0                 | 0.00 %  |
| F                                | Farm                  | 20,508,084     | 2.81 %  | 5,126,950         | 2.80 %  |
| G                                | Parking Lot           | 11,987,321     | 7.33 %  | 25,939,076        | 5.09 %  |
| H                                | Landfill              | 815,495        | -0.30 % | 815,495           | 0.00 %  |
| I                                | Industrial            | 194,807,379    | -0.33 % | 550,541,961       | -3.25 % |
| J                                | Industrial New        | 44,518,501     | 2.69 %  | 136,484,338       | 0.14 %  |
| K                                | Large Industrial New  | 14,170,700     | 0.00 %  | 49,607,236        | -2.22 % |
| L                                | Large Industrial      | 131,842,450    | 0.00 %  | 461,839,269       | -2.22 % |
| M                                | Multi-Residential     | 594,581,661    | -0.15 % | 1,296,188,014     | -6.17 % |
| N                                | Multi-Residential New | 78,440,400     | 0.00 %  | 78,440,400        | 0.00 %  |
| P                                | Pipeline              | 52,666,992     | 0.80 %  | 114,287,369       | 0.80 %  |
| R                                | Residential           | 13,804,378,785 | 0.57 %  | 13,804,378,785    | 0.57 %  |
| S                                | Shopping Centre       | 374,025,349    | -0.61 % | 798,603,107       | -3.67 % |
| T                                | Managed Forest        | 9,740,250      | -0.31 % | 2,435,024         | -0.31 % |
| U                                | Utility Transmission  | 0              | 0.00 %  | 0                 | 0.00 %  |
| W                                | Railway Right-of-Way  | 0              | 0.00 %  | 0                 | 0.00 %  |
| X                                | Commercial New        | 215,019,624    | 5.64 %  | 459,419,267       | 2.36 %  |
| Y                                | Office New            | 291,000        | 0.00 %  | 622,740           | -3.17 % |
| Z                                | Shopping Centre New   | 48,836,198     | 0.00 %  | 104,509,463       | -3.17 % |
|                                  |                       | 18,517,908,282 | 0.49 %  | 21,048,976,360    | -0.80 % |

Clicking on a Property Type (ex: Office) results in a finer table with a breakdown by Realty Tax Qualifier (RTQ):

| - RTC/RTQ 2017 In-Year |                          |               |             |        |                   |        |
|------------------------|--------------------------|---------------|-------------|--------|-------------------|--------|
| RTC/RTQ                | Description              | RTC/RTQ Count | Phased CVA  | Change | Est. Weighted CVA | Change |
| DF                     | Office Bldg PIL: Full    | 2             | 57,598,178  | 0.00 % | 127,291,973       | 0.00 % |
| DG                     | Office Bldg PIL: General | 3             | 41,246,733  | 0.00 % | 91,155,279        | 0.00 % |
| DT                     | Office Bldg: Full        | 21            | 27,524,008  | 4.08 % | 58,901,369        | 0.78 % |
|                        |                          | 26            | 126,368,919 | 0.86 % | 277,348,621       | 0.16 % |

Clicking on the Description (Ex: Office Bldg PIL: Full) results in a listing of properties by roll number (information is concealed below for training purposes).

| - 2017 In-Year Property Listing |             |         |              |              |            |           |         |            |                   |            |                       |
|---------------------------------|-------------|---------|--------------|--------------|------------|-----------|---------|------------|-------------------|------------|-----------------------|
| Tax Year                        | Roll Number | Address | Municipality | Prop. Series | Prop. Code | Site Area | RTC/RTQ | Phased CVA | Est. Weighted CVA | Dest. CVA  | Tax Partition RTC/RTQ |
| 2017                            |             |         |              |              | 402        | 24.390    | CF, DF  | 55,542,751 | 121,270,708       | 62,403,000 | DF                    |
| 2017                            |             |         |              |              | 402        | 0.895     | CF, DF  | 8,127,000  | 17,024,169        | 8,127,000  | DF                    |

Clicking on a roll number brings the user to the final Property View, where property-specific information is available.

## Control Totals (including RTC/RTC Report)

Click the 'Estimated Weighted CVA' for relevant Tax Year (Under In-Year Change Profile):

| - Assessment Change Profile |        |                |          |                   |          |
|-----------------------------|--------|----------------|----------|-------------------|----------|
| Tax Year                    | Count  | Phased CVA     | % Change | Est. Weighted CVA | % Change |
| 2012 CVA                    |        |                |          |                   |          |
| 2013                        | 62,565 | 15,395,616,976 | 7.08 %   | 18,201,820,090    | 26.59 %  |
| 2014                        | 62,750 | 16,422,841,824 | 6.67 %   | 19,429,715,630    | 6.75 %   |
| 2015                        | 63,045 | 17,431,071,933 | 6.14 %   | 20,592,420,169    | 5.98 %   |
| 2016                        | 63,216 | 18,423,059,084 | 5.69 %   | 21,759,810,559    | 5.67 %   |
| 2016 CVA                    |        |                |          |                   |          |
| 2017                        | 63,378 | 18,426,823,486 | 0.02 %   | 21,218,345,574    | -2.49 %  |
| 2017 In-Year Change Profile |        |                |          |                   |          |
| 2017                        | 63,451 | 18,517,908,282 | 0.49 %   | 21,048,976,360    | -0.80 %  |
| 2018                        | 63,451 | 18,911,421,377 | 2.13 %   | 21,559,285,084    | 2.42 %   |
| 2019                        | 63,451 | 19,304,934,297 | 2.08 %   | 22,069,592,973    | 2.37 %   |
| 2020                        | 63,451 | 19,698,447,156 | 2.04 %   | 22,579,901,640    | 2.31 %   |

[View Control Totals](#)

Click "View Control Totals" at the top of the table to view the Control Totals report:

| - 2017 In-Year Assessment by RTC |                       |                |         |                   |         |
|----------------------------------|-----------------------|----------------|---------|-------------------|---------|
| RTC                              | Description           | Phased CVA     | Change  | Est. Weighted CVA | Change  |
| C                                | Commercial            | 1,381,339,836  | -0.75 % | 2,882,389,245     | -3.76 % |
| D                                | Office                | 126,368,919    | 0.86 %  | 277,348,621       | 0.16 %  |
| E                                | Exempt                | 1,413,569,338  | 0.83 %  | 0                 | 0.00 %  |
| F                                | Farm                  | 20,508,084     | 2.81 %  | 5,126,950         | 2.80 %  |
| G                                | Parking Lot           | 11,987,321     | 7.33 %  | 25,939,076        | 5.09 %  |
| H                                | Landfill              | 815,495        | -0.30 % | 815,495           | 0.00 %  |
| I                                | Industrial            | 194,807,379    | -0.33 % | 550,541,961       | -3.25 % |
| J                                | Industrial New        | 44,518,501     | 2.69 %  | 136,484,338       | 0.14 %  |
| K                                | Large Industrial New  | 14,170,700     | 0.00 %  | 49,607,236        | -2.22 % |
| L                                | Large Industrial      | 131,842,450    | 0.00 %  | 461,839,269       | -2.22 % |
| M                                | Multi-Residential     | 594,581,661    | -0.15 % | 1,296,188,014     | -6.17 % |
| N                                | Multi-Residential New | 78,440,400     | 0.00 %  | 78,440,400        | 0.00 %  |
| P                                | Pipeline              | 52,666,992     | 0.80 %  | 114,287,369       | 0.80 %  |
| R                                | Residential           | 13,804,378,785 | 0.57 %  | 13,804,378,785    | 0.57 %  |
| S                                | Shopping Centre       | 374,025,349    | -0.61 % | 798,603,107       | -3.67 % |
| T                                | Managed Forest        | 9,740,250      | -0.31 % | 2,435,024         | -0.31 % |
| U                                | Utility Transmission  | 0              | 0.00 %  | 0                 | 0.00 %  |
| W                                | Railway Right-of-Way  | 0              | 0.00 %  | 0                 | 0.00 %  |
| X                                | Commercial New        | 215,019,624    | 5.64 %  | 459,419,267       | 2.36 %  |
| Y                                | Office New            | 291,000        | 0.00 %  | 622,740           | -3.17 % |
| Z                                | Shopping Centre New   | 48,836,198     | 0.00 %  | 104,509,463       | -3.17 % |
|                                  |                       | 18,517,908,282 | 0.49 %  | 21,048,976,360    | -0.80 % |

Tax partition counts are links to the properties containing the related RTC/RTQ

| Control Totals - (2017 In-Year) |                            |     |     |               |                         |                        |            |            |                            |                           |             |            |
|---------------------------------|----------------------------|-----|-----|---------------|-------------------------|------------------------|------------|------------|----------------------------|---------------------------|-------------|------------|
| Really Tax Class                | Really Tax Qualifier       | RTC | RTQ | RTC/RTQ Count | Previous CVA (Phase In) | Current CVA (Phase In) | Variance   | Variance % | Previous CVA (Destination) | Current CVA (Destination) | Variance    | Variance % |
| C - Commercial                  | Commercial P/L Full        | C   | F   | 163           | 41,560,517              | 41,402,429             | -177,888   | -0.428 %   | 43,358,651                 | 44,074,300                | 715,649     | 1.650 %    |
| C - Commercial                  | Commercial P/L General     | C   | G   | 29            | 27,571,596              | 27,571,596             | 0          | 0.000 %    | 30,841,970                 | 28,739,664                | -2,102,306  | -6.816 %   |
| C - Commercial                  | Commercial Full Shared     | C   | H   | 20            | 5,646,350               | 5,646,350              | 0          | 0.000 %    | 5,796,200                  | 5,891,300                 | 95,100      | 1.641 %    |
| C - Commercial                  | Commercial Vacant Land     | C   | J   | 1             | 135,000                 | 135,000                | 0          | 0.000 %    | 176,000                    | 135,000                   | -41,000     | -23.295 %  |
| C - Commercial                  | Commercial P/L Full Tax    | C   | P   | 2             | 474,000                 | 474,000                | 0          | 0.000 %    | 660,000                    | 474,000                   | -186,000    | -28.182 %  |
| C - Commercial                  | Commercial P/L Full Vac    | C   | R   | 23            | 1,626,025               | 1,776,125              | -49,900    | -2.733 %   | 1,666,200                  | 2,245,400                 | 579,200     | 34.762 %   |
| C - Commercial                  | Commercial Full            | C   | T   | 1,967         | 1,235,631,523           | 1,225,973,540          | -9,657,983 | -0.782 %   | 1,233,419,581              | 1,394,376,827             | 160,957,246 | 13.050 %   |
| C - Commercial                  | Commercial Excess Land     | C   | U   | 101           | 17,366,132              | 16,554,085             | -812,047   | -4.676 %   | 17,654,128                 | 20,176,460                | 2,522,332   | 14.287 %   |
| C - Commercial                  | Commercial P/L General     | C   | W   | 1             | 203,700                 | 203,700                | 0          | 0.000 %    | 206,000                    | 203,700                   | -2,300      | -1.117 %   |
| C - Commercial                  | Commercial Vacant Land     | C   | X   | 567           | 61,376,248              | 61,603,011             | 226,763    | 0.369 %    | 61,484,530                 | 77,643,500                | 16,158,970  | 26.281 %   |
| D - Office                      | Office Bldg P/L Full       | D   | F   | 2             | 57,598,178              | 57,598,178             | 0          | 0.000 %    | 56,827,540                 | 63,999,300                | 7,171,760   | 12.620 %   |
| D - Office                      | Office Bldg P/L General    | D   | G   | 3             | 41,246,733              | 41,246,733             | 0          | 0.000 %    | 46,400,020                 | 43,450,870                | -2,949,150  | -6.356 %   |
| D - Office                      | Office Bldg Full           | D   | T   | 21            | 26,445,576              | 27,524,008             | 1,078,430  | 4.078 %    | 25,509,500                 | 34,178,300                | 8,668,800   | 33.963 %   |
| E - Exempt                      | Exempt                     | E   |     | 3,611         | 1,401,921,687           | 1,413,569,336          | 11,647,651 | 0.831 %    | 1,453,223,535              | 1,539,328,063             | 86,104,548  | 5.925 %    |
| F - Farm                        | Farm Full                  | F   | T   | 206           | 19,948,500              | 20,508,084             | 559,584    | 2.805 %    | 16,115,000                 | 32,723,500                | 16,608,500  | 103.062 %  |
| G - Parking Lot                 | Parking Lot P/L Full       | G   | F   | 9             | 4,058,600               | 4,058,600              | 0          | 0.000 %    | 4,231,410                  | 4,957,300                 | 725,890     | 17.155 %   |
| G - Parking Lot                 | Parking Lot Full           | G   | T   | 41            | 7,260,125               | 7,898,521              | 638,396    | 8.793 %    | 6,591,500                  | 9,399,400                 | 2,808,100   | 42.602 %   |
| H - Landfill                    | Landfill P/L Full          | H   | F   | 5             | 817,982                 | 815,495                | -2,487     | -0.304 %   | 739,109                    | 1,029,200                 | 290,091     | 39.249 %   |
| I - Industrial                  | Industrial Full Shared P/L | I   | H   | 13            | 4,066,250               | 3,366,500              | -699,750   | -16.717 %  | 3,934,000                  | 3,786,500                 | -147,500    | -3.699 %   |
| I - Industrial                  | Industrial Vacant Land R   | I   | J   | 1             | 974,100                 | 974,100                | 0          | 0.000 %    | 966,000                    | 1,098,200                 | 132,200     | 13.676 %   |

Choose the link to view the list of properties with the related tax classes.

| Tax Year | Roll Number | Address | Municipality | Prop. Series | Prop. Code | Site Area | Rtc | Rtq | Phased CVA | Est. Weighted CVA | Dest. CVA |
|----------|-------------|---------|--------------|--------------|------------|-----------|-----|-----|------------|-------------------|-----------|
| 2017     | 1           |         |              | LAND         | 106        | 0.040     | I   | X   | 54,215     | 79,641            | 69,000    |
| 2017     | 1           |         |              | LAND         | 106        | 3.560     | I   | X   | 989,250    | 1,453,208         | 1,131,000 |
| 2017     | 1           |         |              | LAND         | 106        | 1.430     | I   | X   | 428,500    | 629,466           | 526,000   |
| 2017     | 1           |         |              | LAND         | 106        | 1.990     | I   | X   | 465,250    | 683,452           | 556,000   |
| 2017     | 1           |         |              | LAND         | 106        | 0.320     | I   | X   | 198,000    | 290,862           | 198,000   |
| 2017     | 1           |         |              | LAND         | 106        | 4.490     | I   | X   | 1,221,000  | 1,793,649         | 1,374,000 |
| 2017     | 1           |         |              | LAND         | 106        | 1.070     | I   | X   | 332,750    | 488,809           | 413,000   |
| 2017     | 1           |         |              | LAND         | 106        | 2.000     | I   | X   | 584,750    | 858,997           | 698,000   |
| 2017     | 1           |         |              | LAND         | 106        | 1.334     | I   | X   | 402,500    | 591,272           | 497,000   |
| 2017     | 1           |         |              | LAND         | 106        | 10.060    | I   | X   | 1,364,000  | 2,003,716         | 1,469,000 |
| 2017     | 1           |         |              | LAND         | 106        | 0.820     | I   | X   | 287,750    | 422,704           | 341,000   |
| 2017     | 1           |         |              | LAND         | 106        | 9.000     | I   | X   | 1,332,750  | 1,957,809         | 1,440,000 |
| 2017     | 1           |         |              | LAND         | 106        | 4.230     | I   | X   | 409,250    | 601,168           | 653,000   |
| 2017     | 1           |         |              | LAND         | 106        | 1.900     | I   | X   | 557,000    | 818,233           | 668,000   |
| 2017     | 1           |         |              | LAND         | 106        | 4.040     | I   | X   | 1,057,650  | 1,553,687         | 1,257,600 |
| 2017     | 1           |         |              | LAND         | 106        | 1.000     | I   | X   | 312,750    | 459,429           | 390,000   |
| 2017     | 1           |         |              | LAND         | 106        | 2.330     | I   | X   | 673,750    | 989,738           | 793,000   |
| 2017     | 1           |         |              | LAND         | 106        | 2.300     | I   | X   | 665,500    | 977,619           | 784,000   |

## Reasons for changes in Control Totals

Positive change in an RTC/RTQ:

- Growth (Permit activity or assessment update) of partitions of properties currently in the RTC/RTQ
- *Entry* of a new partition on a property, in to that RTC/RTQ (note – this will then negatively affect the control totals of the RTC/RTQ that the partition came out of)

Negative change in an RTC/RTQ:

- Value reduction of the tax partition, due to Minutes of Settlement (RfR), or Appeal Decision
- *Exit* of a tax partition out of that RTC/RTQ (note – This will then positively affect the control totals of the RTC/RTQ that the partition moved into)

*It is recommended that you review your Coding Change report that is included with your Omitted/Supplementary files, to identify those partitions that move in or out of tax*



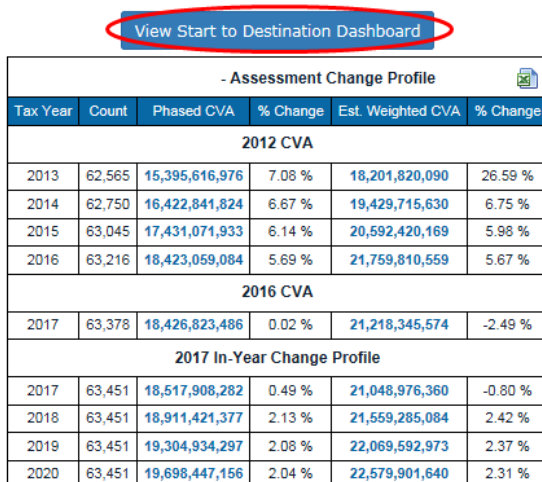
classifications.

- Work in progress on the property with this tax partition
  - *Note: this is different than an Event, that has a Work In Progress (WIP) status*
  - In this case the assessor has “opened” the property record to conduct valuation work
  - While the assessor works on the valuation of the property, often times the phased-in values are “zero’d” out
  - Sometimes, the work is complex enough that the property stays in this open state over the course of more than one day
  - The Control Totals calculator captures those zero values during the nightly process, with the result of negative growth
  - Once the work is complete on the property, phased-in values will return, and the the Control Totals will adjust accordingly
  - It is for this reason that we recommend that you wait one week before contacting your local MSR team with concerns surrounding negative growth

### Starting Point to Destination Value Comparison

Unlike the Base Year Municipal Change Profile Report that is a snapshot at the time of the assessment update; the Starting Point to Destination Value Comparison Tool provides a real-time indicator of the impact from last base year to this one, in anticipation of the next assessment update. It allows the user to toggle from year-over-year view, to a four-year cycle view.

Click ‘View Start to Destination Dashboard’ found at the top of the table:



The image shows a screenshot of a web application. At the top, there is a blue button with white text that says "View Start to Destination Dashboard". Below this button is a table titled "- Assessment Change Profile". The table has six columns: "Tax Year", "Count", "Phased CVA", "% Change", "Est. Weighted CVA", and "% Change". The table is divided into three sections: "2012 CVA", "2016 CVA", and "2017 In-Year Change Profile".

| Tax Year                           | Count  | Phased CVA     | % Change | Est. Weighted CVA | % Change |
|------------------------------------|--------|----------------|----------|-------------------|----------|
| <b>2012 CVA</b>                    |        |                |          |                   |          |
| 2013                               | 62,565 | 15,395,616,976 | 7.08 %   | 18,201,820,090    | 26.59 %  |
| 2014                               | 62,750 | 16,422,841,824 | 6.67 %   | 19,429,715,630    | 6.75 %   |
| 2015                               | 63,045 | 17,431,071,933 | 6.14 %   | 20,592,420,169    | 5.98 %   |
| 2016                               | 63,216 | 18,423,059,084 | 5.69 %   | 21,759,810,559    | 5.67 %   |
| <b>2016 CVA</b>                    |        |                |          |                   |          |
| 2017                               | 63,378 | 18,426,823,486 | 0.02 %   | 21,218,345,574    | -2.49 %  |
| <b>2017 In-Year Change Profile</b> |        |                |          |                   |          |
| 2017                               | 63,451 | 18,517,908,282 | 0.49 %   | 21,048,976,360    | -0.80 %  |
| 2018                               | 63,451 | 18,911,421,377 | 2.13 %   | 21,559,285,084    | 2.42 %   |
| 2019                               | 63,451 | 19,304,934,297 | 2.08 %   | 22,069,592,973    | 2.37 %   |
| 2020                               | 63,451 | 19,698,447,156 | 2.04 %   | 22,579,901,640    | 2.31 %   |



The view now displays the full four-year cycle comparison. The Tax Year Chart now displays the aggregated starting point values. (Note: the ability to drill down through the related property series or tax classes is expected to be available in a future release.)

## Graphs

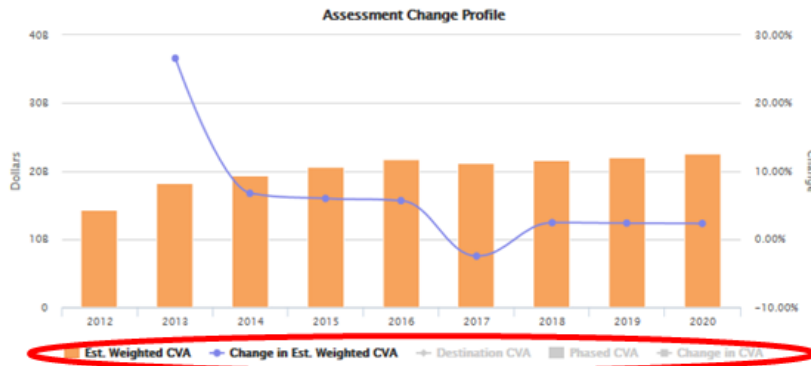
**Estimated Weighted CVA vs Assessment** assists in considering tax policy effects on phased-in CVA. The tax ratios used in the calculations are sourced from the most recent Financial Information Report on the MMAH website.



The graphs on the right are by Property Series and the graphs on the right are by Tax Class. The orange bar represents the Estimated Weighted CVA. The blue bar represents Phased CVA. Click on each bar to see the value.

## Interactive Assessment Change Profile Graph

To view the Assessment Change Profile view, click on and off the elements you want to see displayed in the graph. For example, to compare Estimated Weighted CVA and Change in Estimated Weighted CVA, click the last three variables.




## Tips and Tricks

- This table provides phase-in information by tax year; looking at 2020 provided you with the 2016 CVA.
- The 2017 tax year under "2016 CVA" reflects Roll Return.
- The 2017 tax year under "2017 In-Year Change Profile" reflects the current roll maintenance since Roll Return.
- Control Totals Report is found under the "Estimated Weighted CVA" (see #2 above)

## Property Monitoring

### Orientation

Click on the  icon for a quick view of the Municipality's portfolio, including its Watch List, Assessment, RfRs, Appeals, and Events. These inventories are configurable and allow the user to monitor a range of properties and activities.

1 Watch List Assessments Appeals RFR Events

2 Est. Weighted CVA Z - A Sort

3

| Roll Number   | Address | Prop. Series | Prop. Code | RTG/RTQ | Phased CVA  | Est. Weighted CVA | Open Appeal |
|---------------|---------|--------------|------------|---------|-------------|-------------------|-------------|
| Commercial    | 428     | CT ST        |            |         | 164,299,751 | 351,601,466       | YES         |
| Industrial    | 516     | CT LT        |            |         | 62,636,000  | 209,551,530       | YES         |
| Commercial    | 402     | CF DF        |            |         | 55,542,751  | 121,270,709       | NO          |
| Commercial    | 427     | CT ST        |            |         | 35,004,750  | 74,910,164        | YES         |
| Industrial    | 516     | CT LT        |            |         | 20,103,000  | 67,961,960        | YES         |
| Commercial    | 427     | XT ZT        |            |         | 32,615,500  | 65,517,169        | YES         |
| Industrial    | 516     | CT LT        |            |         | 16,873,000  | 58,791,200        | YES         |
| Commercial    | 427     | XT ZT        |            |         | 25,603,000  | 54,790,420        | YES         |
| Industrial    | 500     | KT KU TT XT  |            |         | 14,766,000  | 50,759,737        | YES         |
| Institutional | 601     | CG DG E      |            |         | 208,756,251 | 50,618,375        | NO          |
| Commercial    | 429     | CT CU ST SU  |            |         | 23,484,751  | 49,273,821        | YES         |
| Industrial    | 566     | PT           |            |         | 22,326,750  | 48,453,387        | NO          |
| Commercial    | 438     | CT E ST      |            |         | 22,187,501  | 46,914,787        | NO          |
| Residential   | 340     | MT           |            |         | 21,273,250  | 46,375,685        | YES         |
| Commercial    | 444     | XT           |            |         | 20,995,750  | 44,930,905        | NO          |
| Commercial    | 429     | CT ST        |            |         | 19,597,501  | 41,930,651        | YES         |
| Commercial    | 429     | CT CU ST SU  |            |         | 18,502,293  | 39,367,732        | YES         |
| Residential   | 340     | MT NT        |            |         | 21,717,750  | 36,411,562        | YES         |
| Industrial    | 516     | CT LT        |            |         | 10,326,000  | 35,326,944        | YES         |
| Residential   | 352     | MT NT        |            |         | 15,461,500  | 32,794,638        | YES         |

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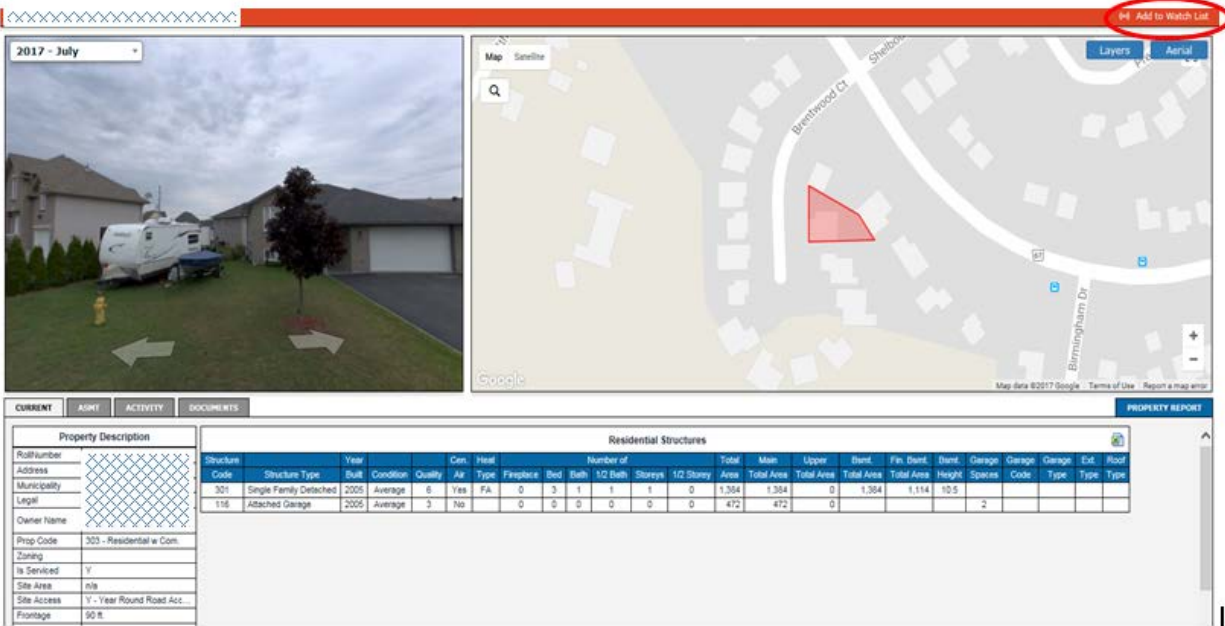
## Key Benefits

- **Watch List:** When a property is added to the Watch List, it appears under the Watch List tab here. It remains there until deleted.
- **Assessments:** The entire Assessment Roll can be sorted to identify properties of significance.
- **Appeals & RfRs:** Use these tabs to filter the roll so that only property roll numbers under RFR review or appeal are listed. They can be sorted from highest to lowest weighted assessment, allowing properties to be quickly identified by their assessment at risk impact.
- **Events:** All published events within this tax year are displayed, sorted from the most recent to the earliest event. The change indicator helps identify causes for in-year change.

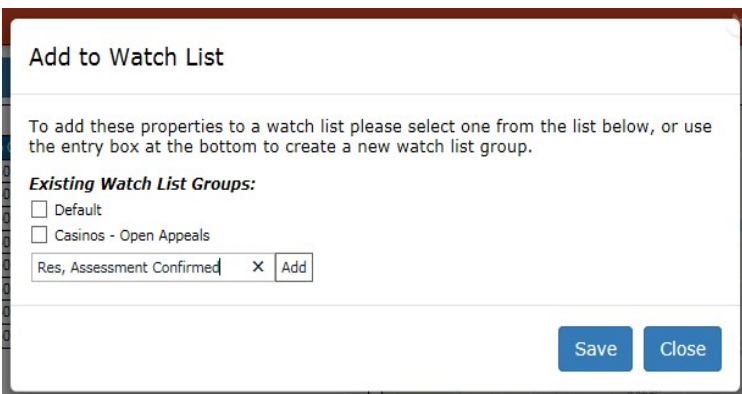
## Functionality

### Database Tabs

- Each Tab allows the user to sort specific databases (Watch List, Assessments, Appeals and RfRs, and Events). The columns contained in each database vary slightly to include relevant information.
- The Watch List is the most dynamic allowing the user to build a custom list.
- At the Property level, the user has the ability to save Properties of Interest to the Watch List by clicking on the 'Add Watch List' icon in the top right corner of the screen.

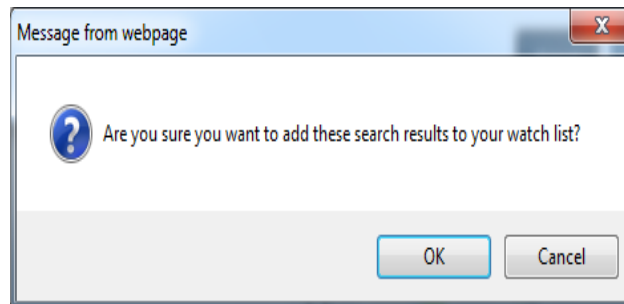


A dialogue box appears prompting users to add to an existing group or create a new group within the Watch List.



- Add the results to an existing watch list group, or add (create) a new list by entering the name of the new watch list group and choosing the 'Add' button.
- If adding a new watch list group, checkmark the newly added watch list, to indicate that the results from the search should be added to this group list.
- Click 'Save'.

Confirm this action by choosing 'OK'.



Confirmation notifications appear at the bottom right of the window.

Move back to your original screen and click the monitoring tool. The property appears in the Watch List until the user deletes it. The user can sort through different Watch List groups by clicking 'Groups' and selecting a list from the dropdown.

| Roll Number | Address | Municipality | Prop | Assessed CVA | Est. Weighted CVA | Open Appeals | RFR | Events |
|-------------|---------|--------------|------|--------------|-------------------|--------------|-----|--------|
| Residential | 301     | RT           |      | 612,000      | 612,000           | NO           | NO  | YES    |
| Residential | 301     | RT           |      | 540,000      | 540,000           | NO           | NO  | NO     |
| Residential | 301     | RT           |      | 534,000      | 534,000           | NO           | NO  | NO     |
| Residential | 301     | RT           |      | 451,000      | 451,000           | NO           | NO  | NO     |
| Residential | 301     | RT           |      | 447,000      | 447,000           | NO           | NO  | NO     |
| Residential | 305     | RT           |      | 352,000      | 352,000           | NO           | NO  | NO     |
| Residential | 301     | RT           |      | 325,000      | 325,000           | NO           | NO  | NO     |
| Residential | 301     | RT           |      | 278,000      | 278,000           | NO           | NO  | NO     |

### Save and name a new watch list

Once results from a specific search have returned, choose the Add to Watch List link.

| RFR #      | Tax Year | Roll Number | Municipality | Prop Code | Notice Type | Status | Reason                |
|------------|----------|-------------|--------------|-----------|-------------|--------|-----------------------|
| RFR0235097 | 2017     |             | Ajax         | 301       | Regular     | Closed | CVA Too High - Equity |
| RFR0240211 | 2017     |             | Ajax         | 301       | Regular     | Closed | CVA Too High - Equity |
| RFR0233775 | 2017     |             | Ajax         | 301       | Regular     | Closed | CVA Too High - Equity |
| RFR0236680 | 2017     |             | Ajax         | 301       | Regular     | Closed | CVA Too High - Equity |
| RFR0234059 | 2017     |             | Ajax         | 301       | Regular     | Closed | CVA Too High - Equity |
| RFR0233707 | 2017     |             | Ajax         | 301       | Regular     | Closed | CVA Too High - Sales  |
| RFR0234181 | 2017     |             | Ajax         | 305       | Regular     | Closed | CVA Too High - Equity |
| RFR0233529 | 2017     |             | Ajax         | 301       | Regular     | Closed | CVA Too High - Equity |

Add the results to an existing watch list, or Add a new list by entering the name of the new watch list and choosing the 'Add' button.

Checkmark the newly added watch list to indicate that the results from the search should be added to this list.

Click 'Save'.

Confirm this action by clicking 'OK'.

Confirmation notifications appear at the bottom right of the window.

NOTE: In this example, the search criterion was – residential properties that filed Request for Reconsideration for the next tax year, but the assessment was confirmed by MPAC. These properties are now eligible to file an appeal with the Assessment Review Board

### View and add comments to a new watch list

To view and add comments to the newly create watch list, move to the Monitoring Tool.

| Roll Number | Address | Municipality | Prop    | Phased CVA | Est. Weighted CVA | Open Appeals | RFR | Events |
|-------------|---------|--------------|---------|------------|-------------------|--------------|-----|--------|
| Residential | 301     | RT           | 612,000 | 612,000    | NO                | NO           | YES | *      |
| Residential | 301     | RT           | 540,000 | 540,000    | NO                | NO           | NO  | *      |
| Residential | 301     | RT           | 534,000 | 534,000    | NO                | NO           | NO  | *      |
| Residential | 301     | RT           | 451,000 | 451,000    | NO                | NO           | NO  | *      |
| Residential | 301     | RT           | 447,000 | 447,000    | NO                | NO           | NO  | *      |
| Residential | 305     | RT           | 352,000 | 352,000    | NO                | NO           | NO  | *      |
| Residential | 301     | RT           | 325,000 | 325,000    | NO                | NO           | NO  | *      |
| Residential | 301     | RT           | 278,000 | 278,000    | NO                | NO           | NO  | *      |

To add comments to this list, choose the Edit Watch List Group icon.

| Roll Number | Address | Municipality | Prop Series | Prop Code | RTC/RTQ | Phased CVA | Est. Weighted CVA | Open Appeals | RFR | Events |
|-------------|---------|--------------|-------------|-----------|---------|------------|-------------------|--------------|-----|--------|
| Residential | 301     | RT           | 612,000     | 612,000   | NO      | NO         | YES               | *            |     |        |
| Residential | 301     | RT           | 540,000     | 540,000   | NO      | NO         | NO                | *            |     |        |
| Residential | 301     | RT           | 534,000     | 534,000   | NO      | NO         | NO                | *            |     |        |
| Residential | 301     | RT           | 451,000     | 451,000   | NO      | NO         | NO                | *            |     |        |
| Residential | 301     | RT           | 447,000     | 447,000   | NO      | NO         | NO                | *            |     |        |
| Residential | 305     | RT           | 352,000     | 352,000   | NO      | NO         | NO                | *            |     |        |
| Residential | 301     | RT           | 325,000     | 325,000   | NO      | NO         | NO                | *            |     |        |
| Residential | 301     | RT           | 278,000     | 278,000   | NO      | NO         | NO                | *            |     |        |

The Edit Watch List Group dialogue box appears.

Add notes and choose 'Save'.

**Edit Watch List Group**

Group Name:

Notes:

These notes can be viewed and edited at any time, by choosing the Edit Watch List Group icon.

## Delete a Watch List

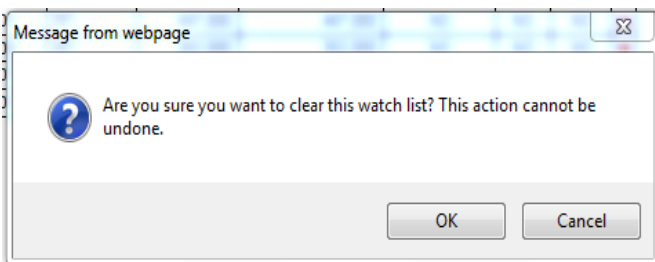
To delete a watch list, choose the 'Clear This Entire Watch List' icon.

A confirmation dialogue box appears. Click 'OK'. Click 'Delete this Watch List'.

The screenshot shows the 'Watch List' tab in the Assessment Portal. The table displays properties with columns: Roll Number, Address, Municipality, Prop Series, Prop Code, RTC/RTQ, Phased CVA, Est. Weighted CVA, Open Appeals, RFR, and Events. A red box highlights the 'Clear this entire watch list' button in the top right corner of the table.

| Roll Number | Address | Municipality | Prop Series | Prop Code | RTC/RTQ | Phased CVA | Est. Weighted CVA | Open Appeals | RFR | Events |
|-------------|---------|--------------|-------------|-----------|---------|------------|-------------------|--------------|-----|--------|
|             |         |              | Residential | 301       | RT      | 612,000    | 612,000           | NO           | NO  | YES    |
|             |         |              | Residential | 301       | RT      | 540,000    | 540,000           | NO           | NO  | NO     |
|             |         |              | Residential | 301       | RT      | 534,000    | 534,000           | NO           | NO  | NO     |
|             |         |              | Residential | 301       | RT      | 451,000    | 451,000           | NO           | NO  | NO     |
|             |         |              | Residential | 301       | RT      | 447,000    | 447,000           | NO           | NO  | NO     |
|             |         |              | Residential | 305       | RT      | 352,000    | 352,000           | NO           | NO  | NO     |
|             |         |              | Residential | 301       | RT      | 325,000    | 325,000           | NO           | NO  | NO     |
|             |         |              | Residential | 301       | RT      | 278,000    | 278,000           | NO           | NO  | NO     |

A confirmation dialogue box appears. Click 'OK'.



Choose the 'Delete this Watch List' button.

The screenshot shows the 'Watch List' tab with the message: 'You have not added any properties to your watch list. You may add properties to your watch list in two ways: (1) When on an individual property page, use the button in the top right corner. (2) Use the button that appears after running a search to add all search results to your watch list.' Below the message is a blue button labeled 'Delete this Watch List'.

Est. Weighted CVA Z - A Sort Groups: Res, Assessment Confirmed

**You have not added any properties to your watch list.**

You may add properties to your watch list in two ways:

- (1) When on an individual property page, use the button in the top right corner.
- (2) Use the button that appears after running a search to add all search results to your watch list.

Delete this Watch List

## Sort Feature

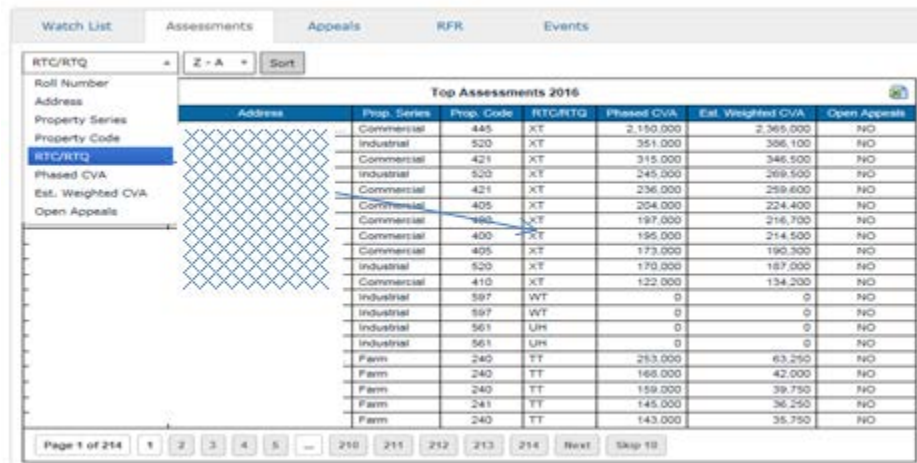
### Sort by Column Heading

This new feature provides the user the ability to select the criteria with which to sort the Watch, Assessment, Open Appeals, Requests for Reconsideration, and Event lists.



To change the defaulted criteria for sorting

- Choose the drop-down arrow on the sorter
- Choose the desired criteria, and click on the [Sort] button

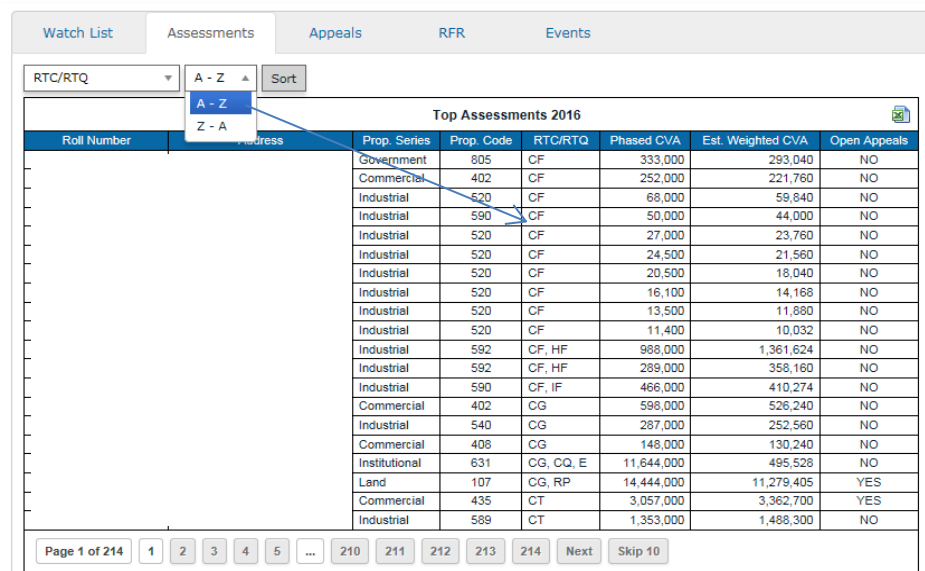


| Roll Number | Address | Prop. Series | Prop. Code | RTC/RTQ   | Phased CVA | Est. Weighted CVA | Open Appeals |
|-------------|---------|--------------|------------|-----------|------------|-------------------|--------------|
| Commercial  | 445     | XT           | 2,150,000  | 2,365,000 | NO         |                   |              |
| Industrial  | 520     | XT           | 351,000    | 306,100   | NO         |                   |              |
| Commercial  | 421     | XT           | 315,000    | 346,500   | NO         |                   |              |
| Industrial  | 520     | XT           | 245,000    | 269,500   | NO         |                   |              |
| Commercial  | 421     | XT           | 236,000    | 259,600   | NO         |                   |              |
| Commercial  | 405     | XT           | 204,000    | 224,400   | NO         |                   |              |
| Commercial  | 405     | XT           | 197,000    | 216,700   | NO         |                   |              |
| Commercial  | 400     | XT           | 195,000    | 214,500   | NO         |                   |              |
| Commercial  | 405     | XT           | 173,000    | 190,300   | NO         |                   |              |
| Industrial  | 520     | XT           | 170,000    | 187,000   | NO         |                   |              |
| Commercial  | 410     | XT           | 122,000    | 134,200   | NO         |                   |              |
| Industrial  | 597     | WT           | 0          | 0         | NO         |                   |              |
| Industrial  | 597     | WT           | 0          | 0         | NO         |                   |              |
| Industrial  | 561     | UH           | 0          | 0         | NO         |                   |              |
| Industrial  | 561     | UH           | 0          | 0         | NO         |                   |              |
| Farm        | 240     | TT           | 253,000    | 63,250    | NO         |                   |              |
| Farm        | 240     | TT           | 166,000    | 42,000    | NO         |                   |              |
| Farm        | 240     | TT           | 159,000    | 39,750    | NO         |                   |              |
| Farm        | 241     | TT           | 145,000    | 36,250    | NO         |                   |              |
| Farm        | 240     | TT           | 143,000    | 35,750    | NO         |                   |              |

## Sort Column Heading by Value

To further sort the desired criteria by highest-to-lowest, or lowest-to-highest.

- Choose the “A-Z” drop-down arrow, and click on the ‘Sort’ button







| Roll Number   | Address | Prop. Series | Prop. Code | RTC/RTQ    | Phased CVA | Est. Weighted CVA | Open Appeals |
|---------------|---------|--------------|------------|------------|------------|-------------------|--------------|
| Government    | 805     | CF           | 333,000    | 293,040    | NO         |                   |              |
| Commercial    | 402     | CF           | 252,000    | 221,760    | NO         |                   |              |
| Industrial    | 520     | CF           | 68,000     | 59,840     | NO         |                   |              |
| Industrial    | 590     | CF           | 50,000     | 44,000     | NO         |                   |              |
| Industrial    | 520     | CF           | 27,000     | 23,760     | NO         |                   |              |
| Industrial    | 520     | CF           | 24,500     | 21,560     | NO         |                   |              |
| Industrial    | 520     | CF           | 20,500     | 18,040     | NO         |                   |              |
| Industrial    | 520     | CF           | 16,100     | 14,168     | NO         |                   |              |
| Industrial    | 520     | CF           | 13,500     | 11,880     | NO         |                   |              |
| Industrial    | 520     | CF           | 11,400     | 10,032     | NO         |                   |              |
| Industrial    | 592     | CF, HF       | 988,000    | 1,361,624  | NO         |                   |              |
| Industrial    | 592     | CF, HF       | 289,000    | 358,160    | NO         |                   |              |
| Industrial    | 590     | CF, IF       | 466,000    | 410,274    | NO         |                   |              |
| Commercial    | 402     | CG           | 598,000    | 526,240    | NO         |                   |              |
| Industrial    | 540     | CG           | 287,000    | 252,560    | NO         |                   |              |
| Commercial    | 408     | CG           | 148,000    | 130,240    | NO         |                   |              |
| Institutional | 631     | CG, CQ, E    | 11,644,000 | 495,528    | NO         |                   |              |
| Land          | 107     | CG, RP       | 14,444,000 | 11,279,405 | YES        |                   |              |
| Commercial    | 435     | CT           | 3,057,000  | 3,362,700  | YES        |                   |              |
| Industrial    | 589     | CT           | 1,353,000  | 1,488,300  | NO         |                   |              |

There are some tools within the Watch List which allow the user to manipulate the list.





|            |             |         |     |        |
|------------|-------------|---------|-----|--------|
| Watch List | Assessments | Appeals | RFR | Events |
|------------|-------------|---------|-----|--------|

Est. Weighted CVA ▾ Z - A ▾ Sort
 

Groups: Default ▾

| Watch List  |         |              |             |           |         |            |                   |              |     |        |
|-------------|---------|--------------|-------------|-----------|---------|------------|-------------------|--------------|-----|--------|
| Roll Number | Address | Municipality | Prop Series | Prop Code | RTC/RTQ | Phased CVA | Est. Weighted CVA | Open Appeals | RFR | Events |
|             |         |              | Residential | 303       | CT, RT  | 332,750    | 357,203           | NO           | NO  | NO     |

-  Allows the user to filter by current municipality only
-  Refreshes the Watch List or any new groups created
-  Clears the entire Watch List
-  Allows the user to export the Watch List to Excel

## Lists

The information for each database is displayed in list format. The columns under each tab vary slightly but each may be exported to Excel.

### Watch List

|            |             |         |     |        |
|------------|-------------|---------|-----|--------|
| Watch List | Assessments | Appeals | RFR | Events |
|------------|-------------|---------|-----|--------|

Est. Weighted CVA ▾ Z - A ▾ Sort
 

Groups: Default ▾






| Watch List  |         |              |             |           |         |            |                   |              |     |        |
|-------------|---------|--------------|-------------|-----------|---------|------------|-------------------|--------------|-----|--------|
| Roll Number | Address | Municipality | Prop Series | Prop Code | RTC/RTQ | Phased CVA | Est. Weighted CVA | Open Appeals | RFR | Events |

### Assessments

Watch List

Assessments

Appeals

RFR

Events

Est. Weighted CVA

Z - A

Sort

Top Assessments 2017



| Roll Number | Address | Prop. Series | Prop. Code | RTC/RTQ | Phased CVA | Est. Weighted CVA | Open Appeals |
|-------------|---------|--------------|------------|---------|------------|-------------------|--------------|
|-------------|---------|--------------|------------|---------|------------|-------------------|--------------|

### Appeals

Watch List

Assessments

Appeals

RFR

Events

Est. Weighted CVA

Z - A

Sort

Assessments Under Appeal

Roll Number

Address

Prop. Series

Prop. Code

RTC/RTQ

Phased CVA

Est. Weighted CVA

## RFR

The screenshot shows the 'RFR' tab selected in the top navigation bar. Below the navigation bar, there is a section titled 'Assessments Under Review'. The table below this section has the following columns: Roll Number, Tax Year, Address, Prop. Series, Prop. Code, RTORTQ, Phased CVA, Est. Weighted CVA, Status, Notice Type, Reason, and Asmt. Confirmed.

## Events


The screenshot shows the 'Events' tab selected in the top navigation bar. Below the navigation bar, there is a section titled 'Events'. The table below this section has the following columns: Roll Number, Address, Eff. Date, Pub. Date, Code, Authority, History Reason, Status, and Nature of Change.

## Tips and Tricks

The Group function under the Watch List helps users stay organized by enabling custom lists to suit individual needs.

## Property Search

### Orientation

Click on the  icon to search and sort your roll. Search filter fields are a combination of drop-down menus, free-form entry (first three letters), or a combination of both. In all cases, to add multiple criteria in each filter, click in the field drop-down menus will allow for as many as chosen.

## Key Benefits

- Search can be performed in a number of specific databases (lower tabs) such as the Assessment Roll, RfRs, Appeals, and Events.
- Enhanced mapping supplements search results.
- Assists in creating custom reports to better suit your needs.

## Functionality

There are several tabs that a user is able to access:

- Street
- Map
- Saved Searched

## Main Search Criteria

At least one field must have input in order to perform a search:

- Property Series
- Property Code (farm occ code)
- Municipality
- Address
- Ward
- SRA

- Tax Class
- Tax Qualifier - **New!** Choose multiple qualifiers for each tax class
- Tax Year
- Roll Number
- Owner
- Legal Description
- Roll Created
- Tenant Tax Liability
- Site Access
- Ward
- **New!** Unit Class (also available in search results and at the property record card)

From here, the user can use any combination of search criteria above to retrieve results from Search Databases (described below)

### *Search Databases*

Each Search Database also includes a secondary of search criteria specific to the database.

#### ASSESSMENT

Year Built  
 Renovation Year  
 Destination Value  
 Phase Value  
 Est. Weighted CVA  
 Building Class  
 Instrument #  
 Sale Type (Prefix)  
 Floor Area  
 Site Area (Ac.)  
 Site Frontage  
 Site Depth  
 Change Current Year Phase-In  
 Structure Code - **New!** Search structure codes for all property types.  
 Sale Date  
 Sale Price –Sale Type (Suffix)

#### APPEALS

Section  
 Status  
 Result  
 Appellant  
 Representative

Original CVA  
Final Value

### RFRS

Status  
Notice Type  
Original CVA  
Assessment Confirmed  
Reason  
Approval  
Final Value  
Result

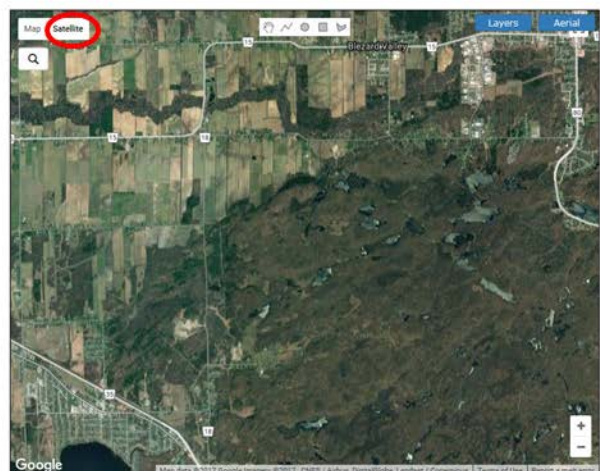
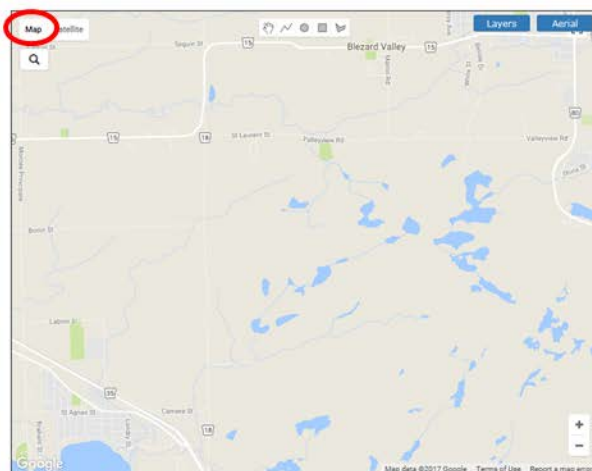
### EVENTS

Effective Date  
Authority  
Status  
Publish Date  
History/Reason  
Nature of Change

## *Mapping*

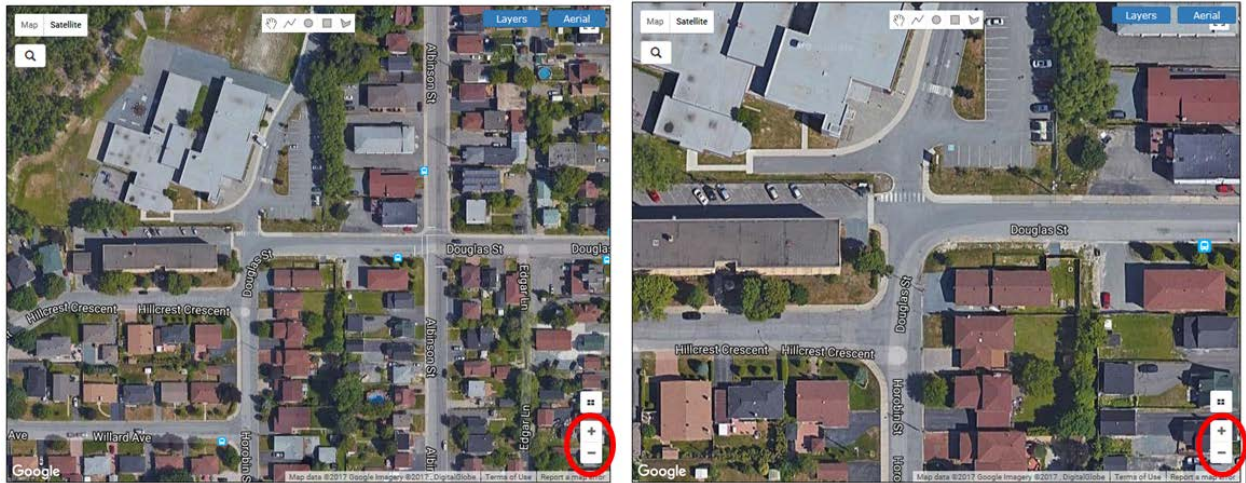
The mapping feature is functional from the Search and Search Results screen.

Users can toggle between Map and Satellite views:





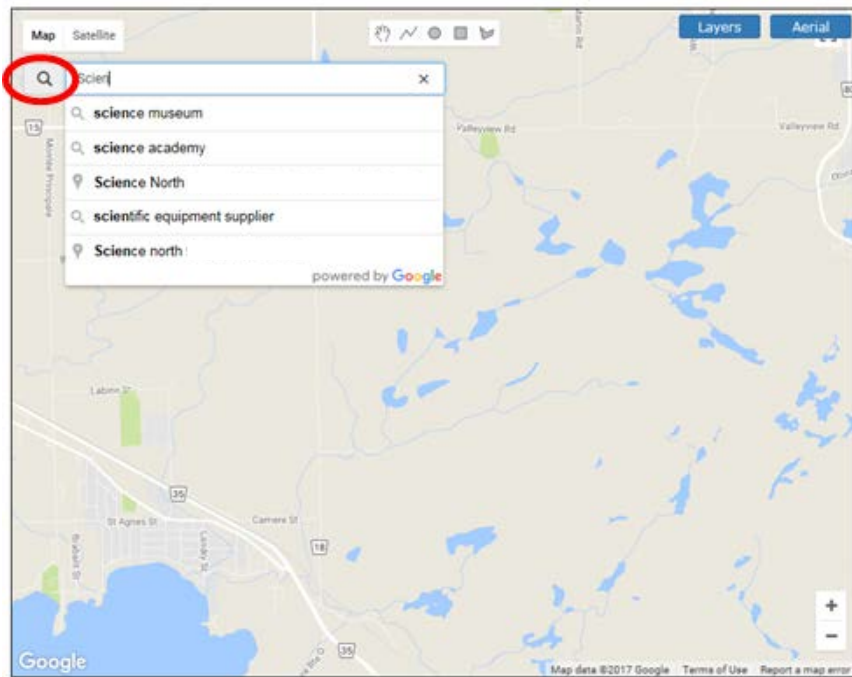
Users can also zoom in and out:



When zoomed in close enough, under Satellite view, the user can switch to an angle view:

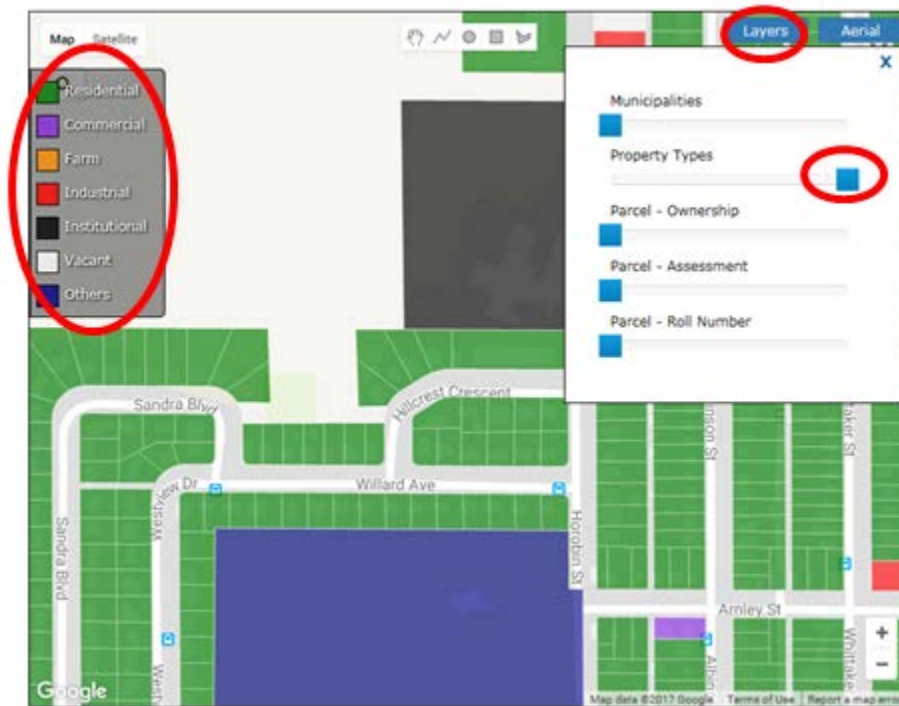


Users can search within the map for landmarks or a specific property address:

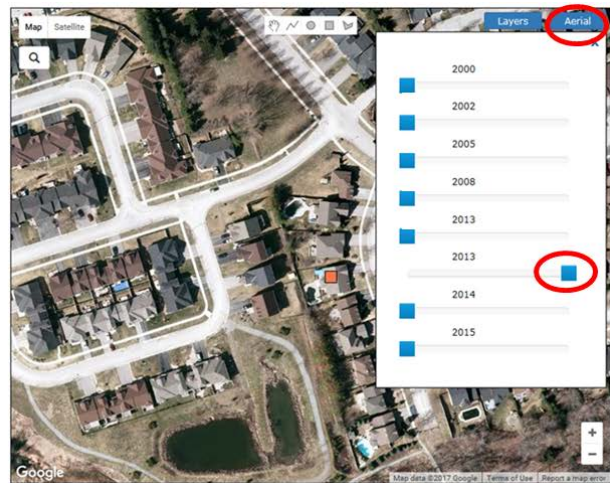
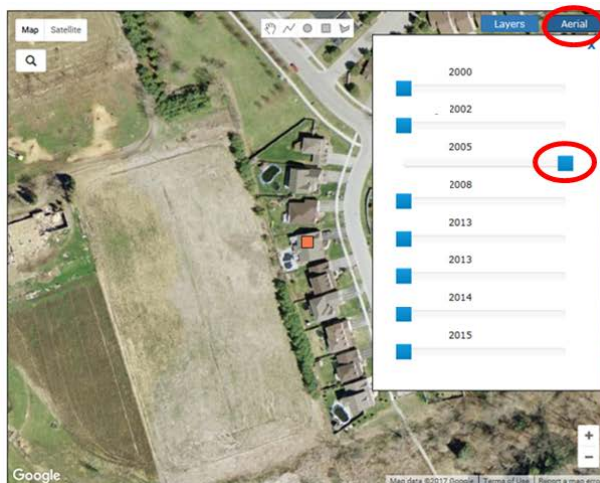


Users can apply various Layers. Below, the Property Type layer is activated by pulling the slider to the right. Multiple layers can be activated at once. If Property Type is selected a legend appears in the top left corner of the map.





Users can choose the Aerial View to compare changes over time. Below, the aerial view is activated for 2005 by pulling the slider all the way to the right. The 2005 view is then deactivated by pulling the slider back to the left, and the 2013 view is activated demonstrating significant change to an area.



## Tips and Tricks

- Property Series filters the Property Code List.

- Property Code further filters the list to include only properties within that property code category.
- Users may create and save custom queries and save them to a watch list so that they can easily repeat the same search at another time

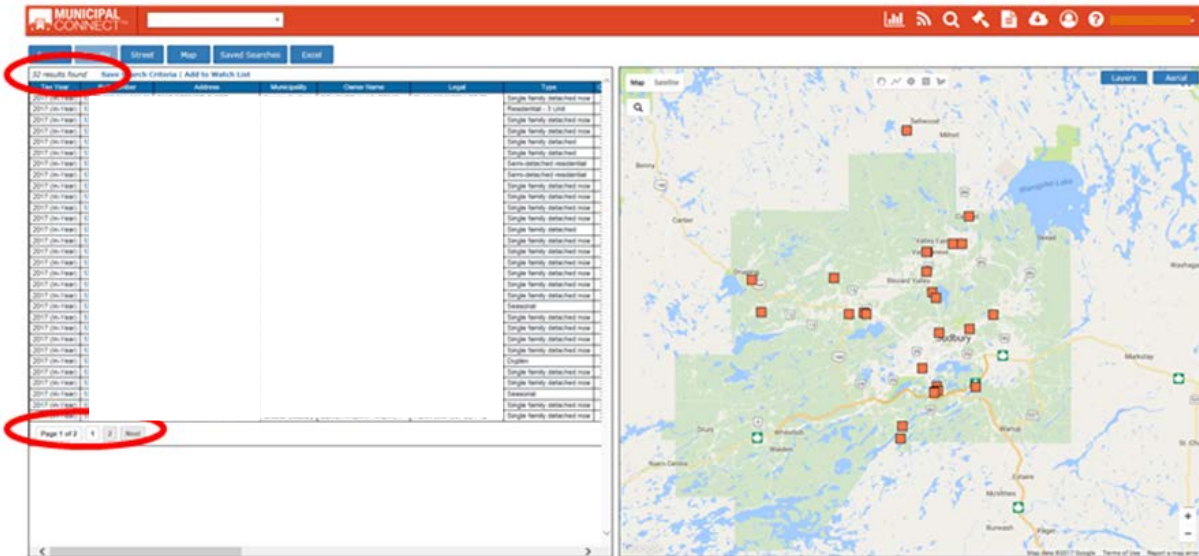
## Working with your Search Results

When working with our Search Results, users have the ability to save search criteria, add search results to a Watch List, export results to Excel, view results on the map, refine map results and downstream to a detailed Property View. See section called XXX for more information on the Property View.

In this example we will perform a Search for all Year Built properties for 2017.

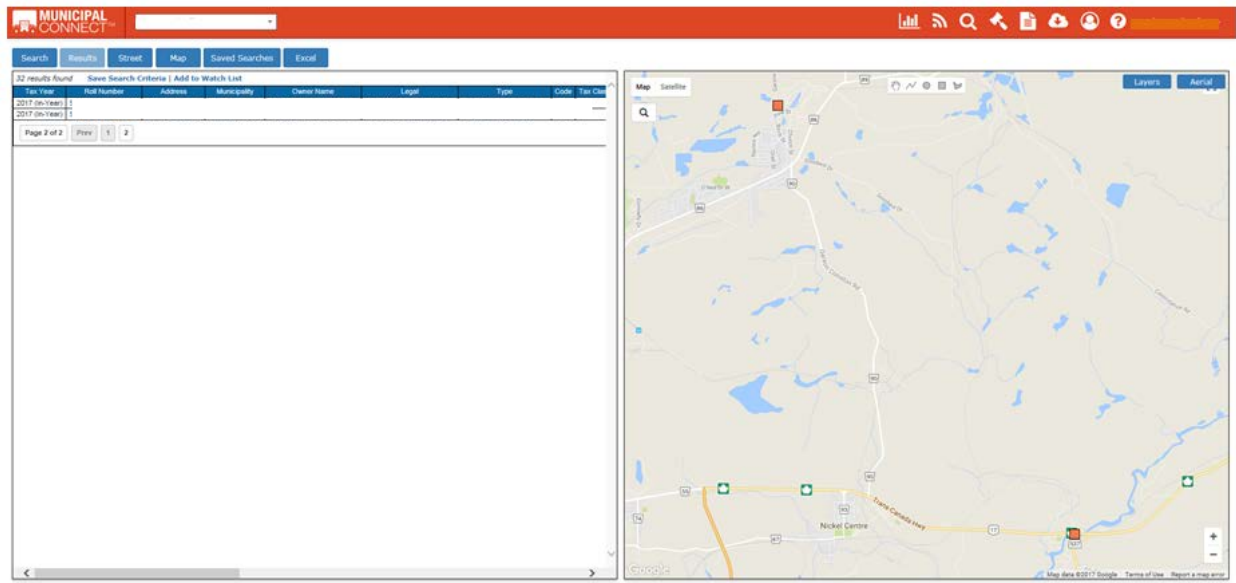
The screenshot shows the MUNICIPAL CONNECT search interface. The 'Assessments' tab is selected. The 'Year Built' field is highlighted with a red circle, showing '2017' to '2017'. Other fields include Property Series, Property Code, Municipality, Address, Ward, SRA, Tax Class, Tax Qualifier, Tax Year (2017 In-Year), Roll Number, Owner, Legal Desc., Roll Created, Tenant Tax Liable, Site Access, Prior Area, Site Area (Ac.), Site Frontage, Site Depth, Chg. Current Year Phase-In, Structure Code, Sale Date, Sale Price, and Sale Type (Suffix). Buttons for 'Submit' and 'Clear' are at the bottom.

Click on the 'Submit' button to display a listing of all properties on the left side of the screen in a table and a map with all the properties displayed on the right will be mapped on the right side of the screen.



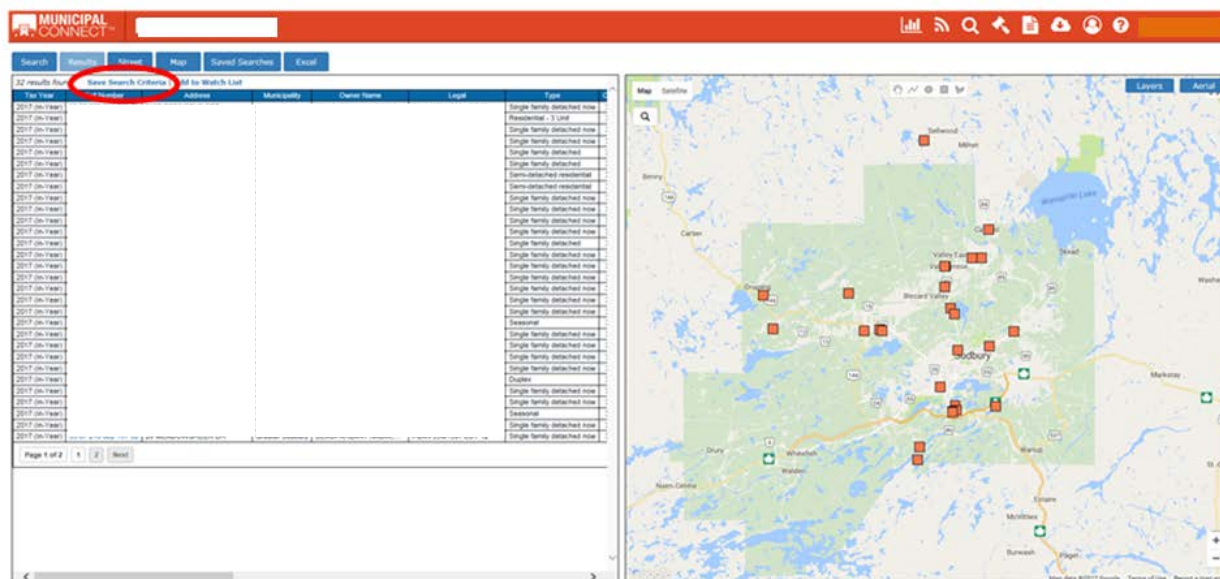
Tip: Only 30 properties are displayed in the table and on the map. If there are more than 30 properties, page navigation buttons at the bottom of the table can be used to move to the next record set of search results. Note the map also updates when using the Page Navigation buttons. In this example you can see at the top of the page there are 32 results found (there would be two more properties on the second table).

**New!** Search results now contain both Starting and Destination values



## Save Search Criteria

Now that search has been performed, you may want to call up the search results at a later date. Let's explore saving the search criteria.



Click on the Save Search Criteria link. A data entry field appears to enter the name of the Search Criteria. A message appears at the bottom right of the page notifying that the Search Criteria has been saved.

32 results found

Tip: When saving a search, the system also saves the search criteria.

| Saved Searches |                   |  |  |
|----------------|-------------------|--|--|
| Type           | Name              | Criteria   |  |
| Assessment     | New properties 20 | 2017 In-Year; Year Built > 2017; Year Built < 2017 |  |

To access the saved searched click on the [Saved Searches] button and top of the page



You will be presented with a listing of all your saved searched. There are two options; you can quickly export to Excel by clicking on the Excel Icon or you can run the search by clicking on the Run button.

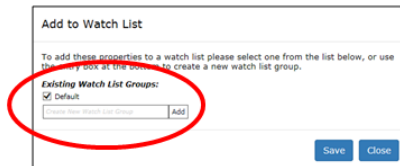
Tip: To remove the Search from the saved searches simply click on the red X icon.

## Add Search Results to Watch List

You may find the need to save search results to a Watch List for closer monitoring. To add results to a Watch List, click on the Add to Watch List Link beside the Save Search Criteria Link.

Save Search Criteria | **Add to Watch List**

When you click on the Add to Watch List Link you are presented with a form to add it to an existing Watch List or you can create a new Watch List.



To create a new Watch List, enter the name of your Watch List in the field and click 'Add'. The new list appears in the Existing Watch List Group list. Select the watch list and click 'Save'.



You are prompted with a dialog box to ask if you are sure if you want to add the results to your Watch List. You have the option to select 'OK' or 'Cancel'.

At the bottom right corner of the screen, users are presented with two information messages: A Blue one asking users to please wait while properties are added to the Watch List and a Green confirmation message verifying the number of properties added and to which Watch List.



Tip: There is no limit on the number of Watch List that may be created.

Note: For more information on working with Watch List please reference the Monitoring section of this manual.

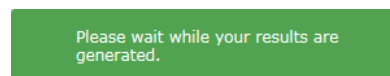


## Exporting your Search Results to Excel

Results may be exported to Excel by clicking the Excel on the top of the page.



Once the Excel button is clicked, users are presented with an information message stating results are being generated. The message appears at the bottom right of the screen.



Once results have been generated, users are prompted to either Open or Save your Search Results.



Sample of a report: (Please note: Roll Number, Address, Municipality, Owner Name and Legal have been blanked out in this example)

A screenshot of a large data table with many columns and rows. The columns include various property details such as Roll Number, Address, Municipality, Owner Name, and Legal. The table is filled with data, and some cells are highlighted in yellow. The table is presented in a landscape orientation.

Please note the disclaimer message at the bottom of your report: *“The information contained on this record (the “Information”) is provided “as is” by the Municipal Property Assessment Corporation (“MPAC”) to the municipality or school board (the “Institution”). The Institution assumes all risks and liabilities from the use of the Information, and may only use the Information for planning purposes or the issuing of tax bills in accordance with the Municipal License Agreement and applicable Product Use Sheets entered into by MPAC and the Institution.”*

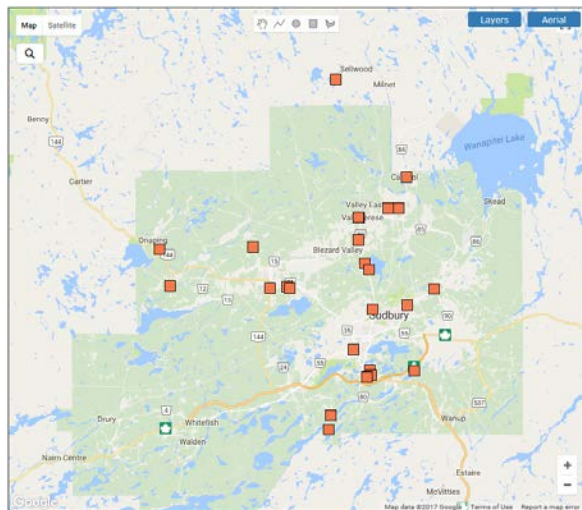
## Exploring your Search Result with the Map

The mapping feature of Municipal Connect gives users a bird’s eye view of the property search. Users have the ability to select a single property to view basic property information and by clicking on the Roll Number link you can launch the Property Profile view for more detailed

information. You will also have the ability tool set where you have access to a Tape Measure, Search Radius, Search Box and Search Polygon.

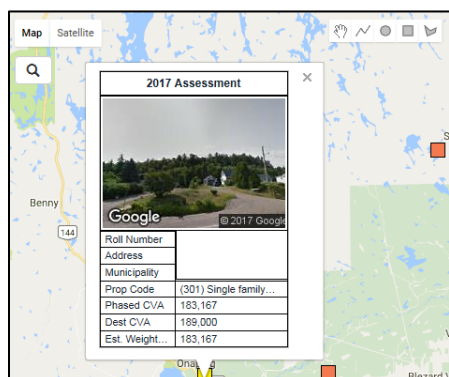
### Selecting basic view of a property

The map displays the first 30 properties from the search. They can be identified by a red square.



Click on a red square to view a basic view of the property. A street view of the property as well as the Roll Number, Address, Municipality, Property Code, Phased CVA, Destination CVA and the Estimated Weighted CVA appear. To access the Detailed Property view, click on the blue roll number.

Tip: For more information on the Detailed Property View please access the Getting to Know the Property Level section of this User Guide.



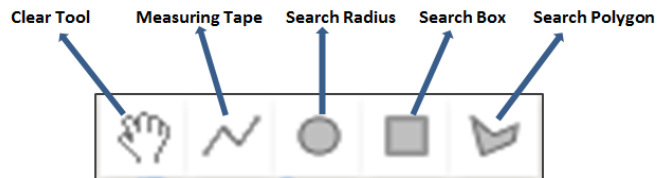
### Using the Map Tool Set



The Map Tool Set allows users to use their mouse to filter data and measure an area of your map. Let's explore.

Note: There must be a search results in your map to activate the Map Tool Set.

Tip: The tool set will not update your search results if a Saved Search is used. Re-enter search criteria in the Search Screen to activate the Map Tool Set functionality.



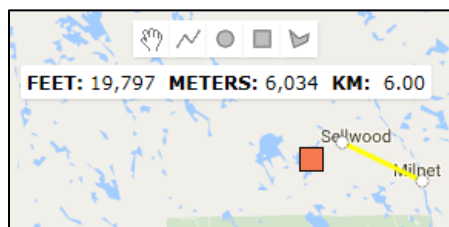
### *Clear Tool*

The Clear Tool allows users to clear results from the Measuring Tape, Search Radius, Search Box and the Search Polygon.

### *Measuring Tape*

The Measuring Tape allows return a value between two points and area. To use the tool click on the Measuring Tape to select the tool then left click on a starting point on your map then release the mouse click, then drag your mouse to your destination point then left-click your mouse to complete the measurement. This is a very helpful tool for measuring property lines.

In this example, the distance between Shellwood and Milnet was measured. The results are displayed in feet, metres and kilometres.

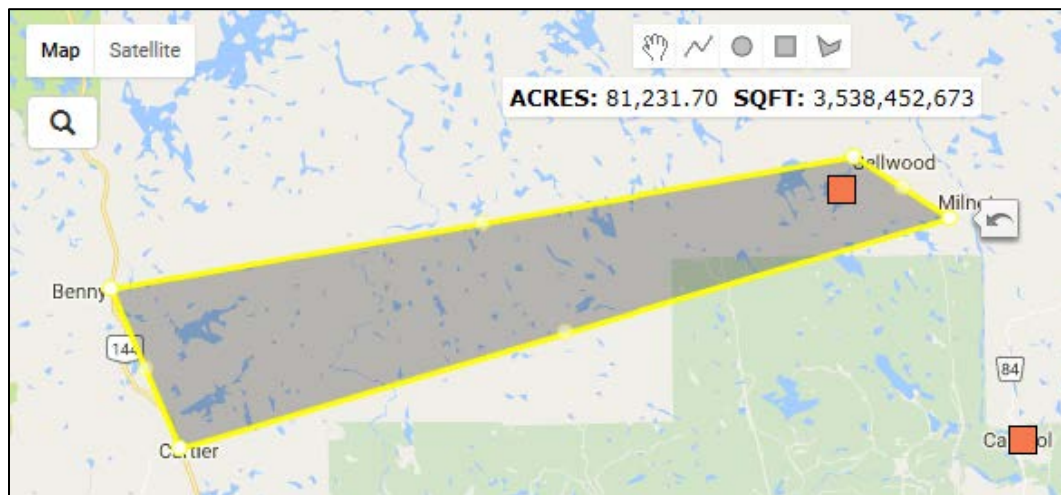


Tip: To initiate a new measurement, click on the Clear Tool.

To measure an area click the mouse button on a starting point of the map release the mouse button click drag your mouse to the desired ending point and click the mouse button. Click mouse on the ending point and release the mouse button. Complete this process until the desired area you would like to measure is selected.

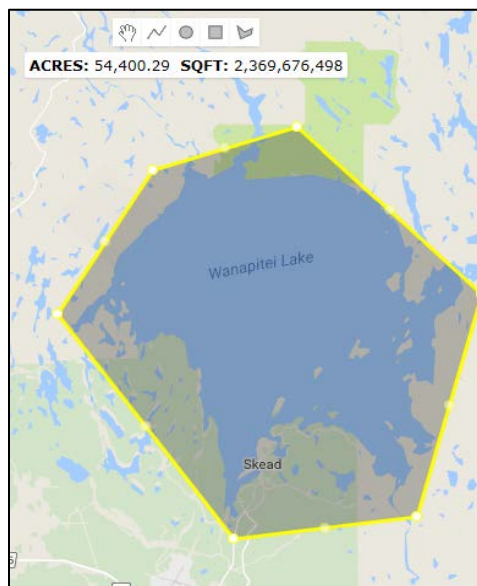


In this example the area between four towns is measured. The area is displayed in acres and square feet.

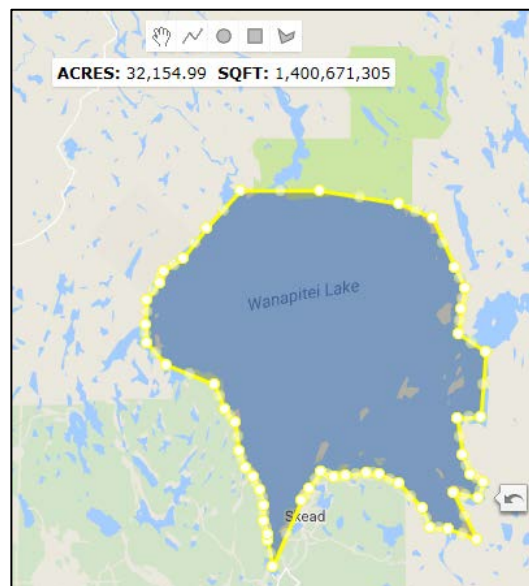


Tip: To change the size of the area you can click on any of the yellow dots and drag to your mouse to the desired area you would like to measure an area. The shape can be very complex if desired. For example, you can measure the area of a lake or an island.

Before



After



## Search Radius

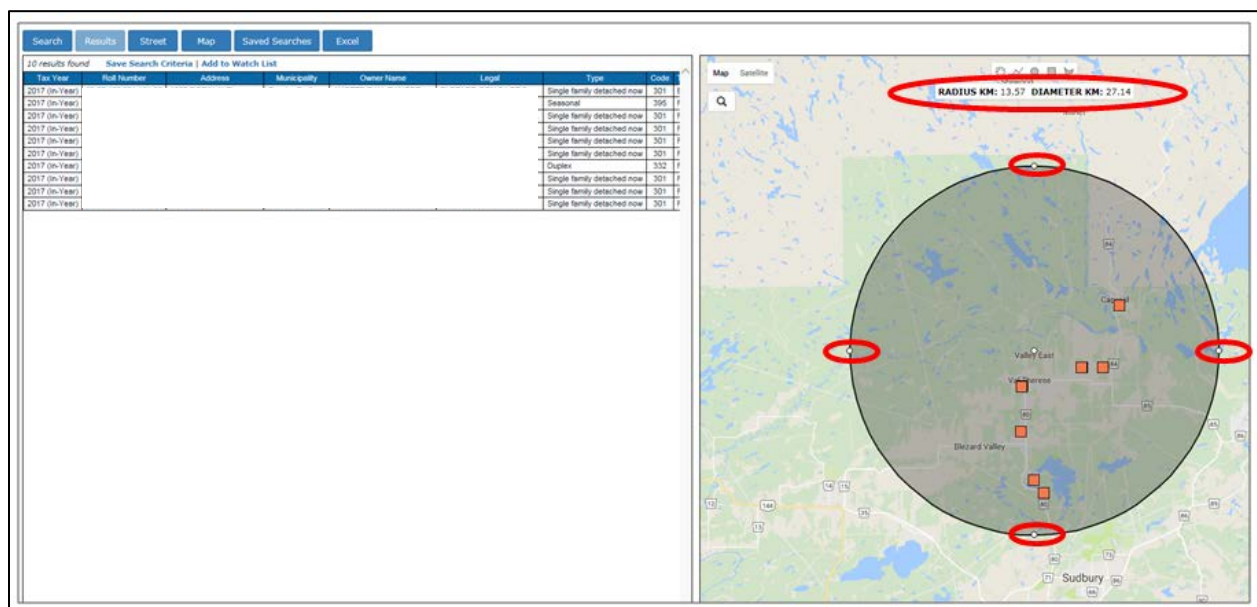
The Search Radius tool allows users to fine tune the search results.

Tip: Search results must display in the map to activate the Search Radius Tool.

Note: Any properties touching the line when using the Radius, Box or Polygon are included in the search results.

Click on the Search Radius Icon to select the tool. Single-click in the centre of the map where you want to select your properties. Release your mouse click, and drag the mouse to the desired search area and single-click your mouse to capture the properties in your Search Radius.

Notice the search results grid has been updated with the results from the Search Radius and the map zones in on your results. The Radius and Diameter are displayed in kilometers. You can move to expand or shrink your radius simply hover your mouse over one of the four dots on the radius and click and drag your mouse to expand or shrink your radius, similar to how cells are expanded in Excel.



## Search Box

The Search Box works very similar to the Search Radius.

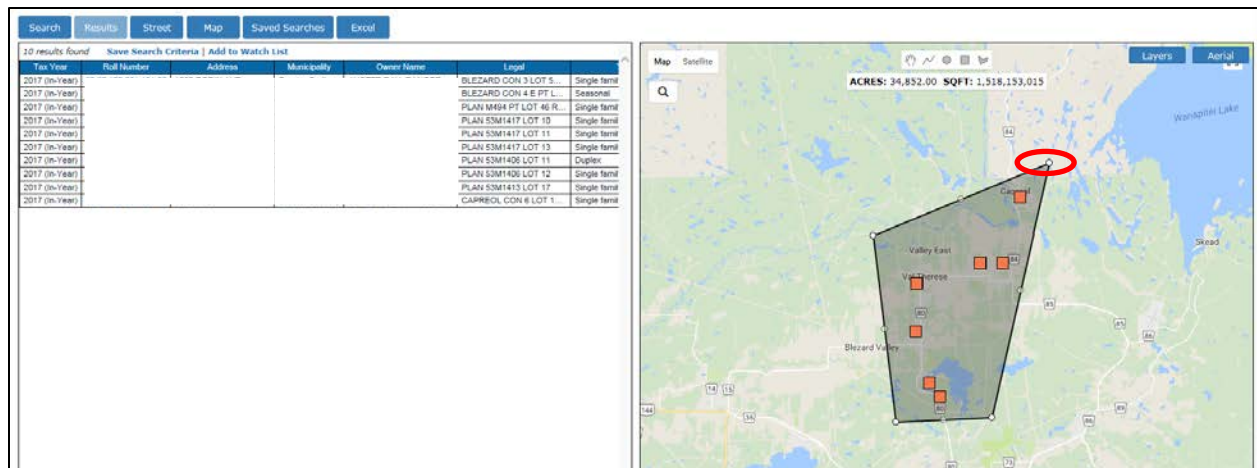
Note: There must be a search results in the map to activate the Search Box Tool.

Notice the search results grid has been updated with the results from the Search Box and the map zone in on the results. The size of the Search Box is displayed in acres and square feet. You can move to expand or shrink your Search Box simply hover your mouse over one of the eight dots on the box and click and drag your mouse to expand or shrink your box, similar to how cells are expanded in Excel.



Click on the Search Polygon tool and then click on a starting point of the map and drag the mouse to the next point on the map and repeat this process until you have completed your mouse clicks back to the starting point.

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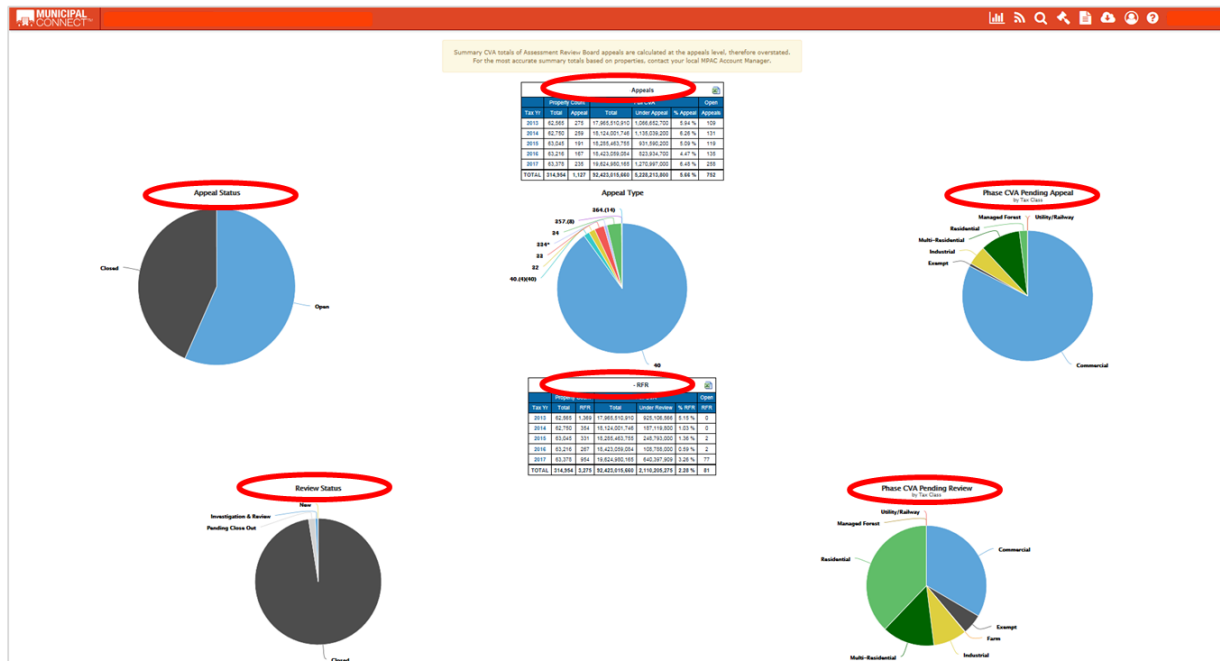
## Tips and Tricks

- Property Series will filter the Property Code list.
- Property Code further filters the list to include only properties within that property code category.
- You can create and save custom queries and save them to your Watch List so that you can easily repeat the same search at another time

## Appeals and Request for Reconsideration Dashboard

### Orientation

Click on the  icon for a portfolio-level view of all Appeals and Request for Reconsiderations (RfR). The Appeals and RfR dashboard provides a summary and accumulated total by tax year, in relation to the total assessment base of Property Count, Full CVA and Phased-in CVA. From the Appeals and RfR Dashboard, users can drill down into the properties that feed into the summaries.

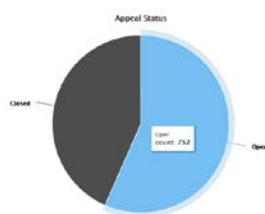


## Key Benefits

- Users can see a quick summary of the assessment at risk for both Appeals and RfRs.
- Hyperlinks allow the user to easily drill down by tax year and property series until ultimately reaching the Property Level view for a property under Appeal or Request for Reconsideration.

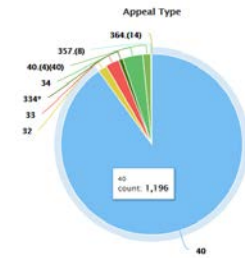
## Functionality

The main purpose of the Appeals & RFR Dashboard is to display a current snapshot of all Assessment at Risk in a Municipality, either through Appeal or Request for Reconsideration. The following Pie Charts provide information and values in greater detail:



### Appeal Status:

- Displays status of all Appeals
- Hover over pie chart to display a count of total Open or Closed Appeals



### Appeal Type:

- Displays number of Appeals by Section under the Assessment Act
- Hover over pie chart to display a count of Appeals by Type



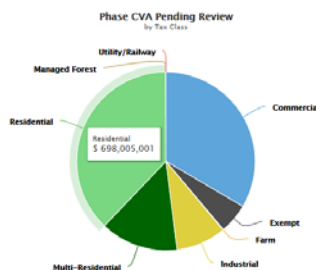
### Total CVA under Appeal:

- Displays Phased Current Value Assessment pending Appeal by Tax Class
- Hover over a tax class on the pie chart to display a total dollar value under Appeal (Assessment at Risk)



### Request for Reconsideration (RfR) Status:

- Displays the status of the RfR – New, under Investigation & Review, Pending Close Out and Closed
- Hover over pie chart to display a count of by Status



### Total CVA Pending Review under Request for Reconsideration (RfR):

- Displays Phased Current Value Assessment pending RfR by Tax Class
- Hover over a tax class on the pie chart to display a total dollar value under RfR (Assessment at Risk)

### Tips and Tricks

- Pie charts provide a quick summary, with hover views that indicate absolute values.
- Summary CVA totals of Assessment Review Board appeals are calculated at the appeals level, therefore overstated. For the most accurate summary totals based on properties, contact your local MPAC Account Manager.

## Information Icon

### Orientation

Click the  icon for the Terms of Use, Municipal Uses of Information.

### Key Benefits


- Assists users in determining their authorization to access MPAC information.
- Assists users in determining the appropriateness of their use of MPAC information.

### Tips and Tricks

Check often, to ensure you are up to date with the latest information about access and use of MPAC information.

## Help

### Orientation

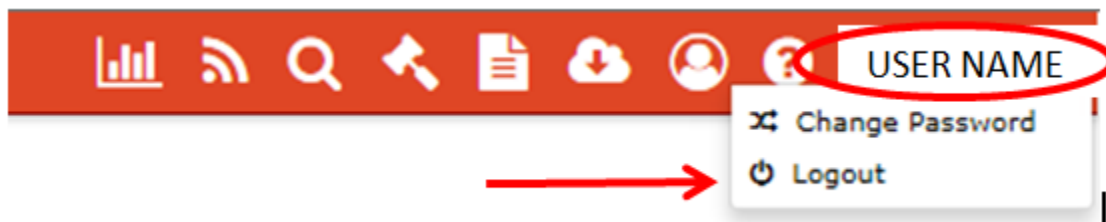
Click the  icon for the FAQ document, and How-To Videos.

### Key Benefits

- How-to Videos are easy to follow and enhance the user experience.
- FAQ document provides quick answers to the most common questions.

## Logging Out

Click on your user name in the top right hand corner of the Tool Bar and then click 'Logout'.



For inquiries, further assistance and feedback, please contact your respective Municipal & Stakeholder Relations Account Manager - <https://www.mpac.ca/Municipalities>