

LA-13 Upload

GATEWAY – Taxrate MODULE

Help | My Profile | Logout
Logged In: James Paquette
Last Logged In: 3/20/2024 8:20:59 AM

Taxrate

Tax Rate

Clerks may now enter Proposition 2 1/2 votes into Gateway! Please read our guide [How to enter Proposition 2 1/2 votes in DLS Gateway](#) for more information, or contact DLSGateway@dor.state.ma.us or Databank@dor.state.ma.us for assistance.

Completing Assessment forms - FY 2024

- **LA-5 form, Residential or Senior Means-Tested Exemptions:** If adopting either exemption type, you must upload your local exemption calculation worksheet to the LA-5 form. This worksheet should include the following required fields: parcel location/address, class, total value, exempted value and net value after exemption.
- **The *Shifting the Tax Rate* report** provides all the background information and calculations relating to shifting the tax rate. If you are considering a classified rate instead of a single rate for FY 23, run this report to fully understand your options. Use the Options Table to create, download and analyze potential shifts.
- **Audited Personal Property:** For more information on this form, download BLA's [Instructions for Submitting Audited Personal Property](#).
- **NEW: Growth changes for FY24:** All communities will upload parcel data using a new LA-13 Upload screen, with uploaded data automatically populating the Growth column in the LA13 form. You must use the new, [simple growth upload template](#) to upload growth parcels to Gateway. Click here for [Instructions for uploading growth data](#). BLA's previous template has been renamed [New Growth Verification Template](#) and can be used as a verification tool. Click here for [Instructions for using the verification template](#). Click here for more information [about New Growth](#).
- **Important Note: Gateway will enforce all educational requirements for Board members and Assistant Assessors.** Communities whose Boards of Assessors lack a majority of members qualified to classify property will see warnings on the tax rate forms that cannot be approved by DLS. Individual assessors who have not successfully completed Course 101 within 1 year of election or appointment will not be permitted to sign, save or submit any Gateway form.

Need assistance or guidance? Click here for more information in BLA's [Instructions for completing assessment forms and entering FY24 Tax Base Levy Growth](#).

Click here to find the name of the [BLA Advisor assigned to your community](#). Contact information (email and phone number) for your community's advisor is available on [DLS's Staff Directory webpage](#).

Completing Finance forms - FY 2024

- **Recap/Pro Forma Page 3 Support.** Submission of the Page 3 Support form is required to document variances and to provide the Itemized detail for Misc. Recurring and Misc. Non-recurring receipts. Enter a comment where required on the estimated/Actual and MRGF tabs; error messages will disappear as you enter these required comments. On the Misc Recurring and Misc Non-recurring tabs, enter each individual receipt type that together form the totals entered on Page 3 lines 22 and 23.
- **NEW LA-5 form for FY 2024** - a new, 2-tab LA-5 form will simplify the important task of entering tax rate options. All calculation options and hearing information will be entered on the Tax Rate Options tab. The calculated results of those options is displayed on the Calculated Results tab (in the legacy LA-5 format, so it should look familiar.) Click here for a [user guide to the new LA-5 form](#).
- **The Options Table** has helpful text explaining shift options, and has sections for testing both the Residential Exemption and Senior Means-Tested Exemption options. Click here for [DLS's Residential Exemption Calculator](#), which shows the potential impact of a residential exemption.
- **The *Shifting the Tax Rate* report** provides all the background information and calculations relating to shifting the tax rate. If you are considering a classified rate instead of a single rate for FY 23, run this report to fully understand your options (and use the Options Table to analyze potential shifts.)

Need assistance or guidance? Click here for more [Tips for Using the BOA Tax Rate Recap forms](#).

Click here to find the name of your community's [BOA Advisor for FY 2024](#). Contact information (email and phone number) for your community's advisor is available on [DLS's Staff Directory webpage](#).

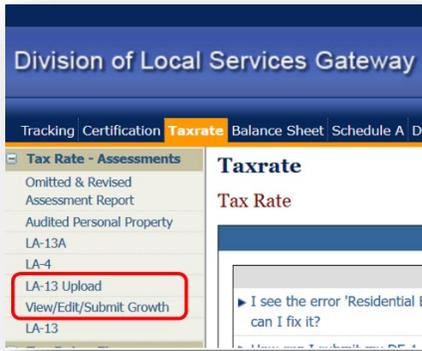
Downloadable Templates

Recap/Pro Forma supporting documentation:

- **Major Disaster Amortization Schedule**
- **Recap Page 3 Support:** The Excel template has been replaced by online submission of the new Recap Page 3 Support form.
- **Pro Forma Recap:** The Bureau of Accounts requires upload of an [Unused Levy Capacity Letter](#) prior to Pro Forma submission. The actual letter text can vary, but it should contain all information shown in the template.
- **Support for the A-2 form: Enterprise Fund User Charge Template**
- **LA13 New Growth Templates:** Click here for BLA's [Simple Growth Upload Template](#). This Excel file should be used for uploading growth data beginning in FY 2024. The Bureau of Local Assessment suggests using the prior year's [new growth verification template](#) as a tool for verifying growth submissions.
- **Budget and Tax Rate Planning Tool:** Click here to download an Excel-based [Budget Analysis Recap tool](#) to assist with tax rate planning. Please note that Excel rounding may vary from Gateway rounding, and this file cannot be used for data submission. It is for planning and analysis purposes only.
- Considering a Prop 2 1/2 override or exclusion? Use our [Proposition 2 1/2 Override/Exclusion Calculator](#) to determine the impact on taxes.
- Considering a residential exemption? Try our [Residential Exemption Calculator](#) to determine the potential impact on taxes.
- Sample template for submitting [support for residential or senior means-tested exemptions](#)

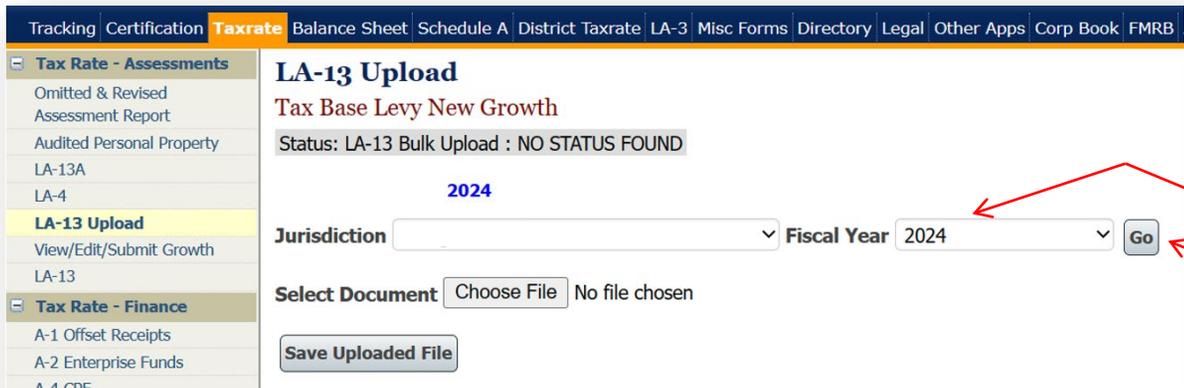
Gateway Support

DLS Gateway Support: email DLSGateway@dor.state.ma.us for general Gateway assistance.
The **DLS Databank** can assist with questions or issues concerning Residential Exemptions, Small Commercial Exemptions, and all vote types (debt exclusion, capital exclusion, stabilization fund, override and override.) Email the Databank: Databank@dor.state.ma.us.



“The Tax Rate – Assessments section” contains: – the LA-13 Upload and the View/Edit/Submit Growth sections. These allow for the upload of the LA-13 Template directly into Gateway and an editing feature for use after upload. The structure of the LA-13 submission is now similar to the LA-3 Upload.

Bulk Upload



To begin the bulk upload process for the community, go to the LA-13 Upload screen:

Select The Fiscal Year & Click Go

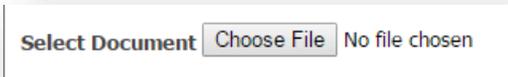
Completing Assessment forms - FY 2024

- **LA-5 form, Residential or Senior Means-Tested Exemptions:** If adopting either exemption type, you must upload your local exemption calculation worksheet to the LA-5 form. This worksheet should include the following required fields: parcel location/address, class, total value, exempted value and net value after exemption.
- The **Shifting the Tax Rate** report provides all the background information and calculations relating to shifting the tax rate. If you are considering a classified rate instead of a single rate for FY 23, run this report to fully understand your options. Use the [Options Table to create, download and analyze potential shifts](#).
- **Audited Personal Property:** For more information on this form, download BLA's [Instructions for Submitting Audited Personal Property](#).
- **NEW: Growth changes for FY24:** All communities will upload parcel data using a new LA-13 Upload screen, with uploaded data automatically populating the Growth column in the LA13 form. You must use the new, [simple growth upload template](#) to upload growth parcels to Gateway. Click here for [instructions for uploading growth data](#). BLA's previous template has been renamed [New Growth Verification Template](#) and can be used as a verification tool. Click here for [instructions for using the verification template](#). Click here for more information [about New Growth](#).
- **Important Note: Gateway will enforce all educational requirements for Board members and Assistant Assessors.** Communities whose Boards of Assessors lack a majority of members qualified to classify property will see warnings on the tax rate forms that cannot be approved by DLS. Individual assessors who have not successfully completed Course 101 within 1 year of election or appointment will not be permitted to sign, save or submit any Gateway form.

Before uploading your file:

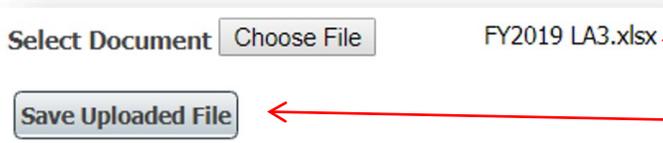
Download the **simple Excel template** file for the LA-13 ([use of the simple template is mandatory for uploads](#)), copy your data into the downloaded file and make sure you are using correctly formatted data for each of the headings. Save the file to your computer.

See the Instruction sheet for completing the Template.



When you are ready for the actual upload, and you have reviewed your LA-13 (making sure that it is in compliance with DOR requirements) (*With the exception of the LOC ID format, use only alpha and numeric characters (if it isn't a number or a letter, remove it), Columns B and H must have less than 32 characters*) – then press the “Choose File” button.

This will take you to your computer files and you can select your completed Template.



After choosing your file, the name will appear next to “Choose File”.

Click on “Save Uploaded File” to save the file.

LA-13 Upload
Tax Base Levy New Growth

i Your file has been uploaded and is waiting to be processed. You can delete this file if required.

Status: LA-13 Bulk Upload : FORM ENTERED

ABINGTON - 001 2024

Jurisdiction Fiscal Year 2024

File Name: GrowthReportingTemplate FY23 9-27-22 FINAL REV.xlsx

File Upload Date: 5/17/2023 11:43:47 AM

Status: Pending

Remarks:

You may receive a notice that the upload is in process.

This may take a few seconds or may take a longer period.

You will be sent an email when the file is processed.

If the process takes more than a few minutes, hit the Go button - this may result in the data showing up on the screen.

When the upload is complete the Status will say “Completed”

Tax Base Levy New Growth

Status: LA-13 Bulk Upload : FORM ENTERED

ABINGTON - 001 2024

Jurisdiction Fiscal Year 2024

File Name: GrowthReportingTemplate FY23 9-27-22 FINAL REV.xlsx

File Upload Date: 5/17/2023 10:41:13 AM

Status: **Completed**

Remarks:

If there are incorrect records, they will be listed separately above the “Correct Records”, in the upload section. ***Before working on the incorrect records, hit the reprocess incorrect records button. Some or all, of the records may automatically be reprocessed.*** The remaining items will need to be corrected on the screen (segments circled in **RED**) and you will need to reprocess this data [hit the Reprocess Incorrect Records” button, at the bottom left of the page].

LA-13 Upload

Tax Base Levy New Growth

Status: LA-13 Bulk Upload : FORM ENTERED

2024

Jurisdiction Fiscal Year 2024

File Name: GrowthReportingTemplate FY23 9-27-22 FINAL REV.xlsx

File Upload Date: 5/17/2023 11:43:47 AM

Status: Completed

Remarks:

Incorrect Record(s): 4 Hover your mouse over data fields with a red border to see why the data could not be processed.

Delete	Parcel ID/PP Act#	Loc ID/PP Bus Name	Street #	Street Alpha	Street Name	Class Code	Flag Code	Growth Reason	Residential Growth Amount	Open Space Growth Amount	Co G
<input type="checkbox"/>	103000	COLONY CENTER	277		WASHINGTON ST	502		New Item			41:
<input type="checkbox"/>	100030	NATIONAL VISION	777		BROCKTON AV	502		New Item			29:
<input type="checkbox"/>	100450	ROBERT J MCDON	550		WASHINGTON ST	502		New Item			30:
<input type="checkbox"/>	111560	U HEAUL MOVING	403		BEDFORD ST	502		New Item			55:

If there are a large number of incorrect records, you can reach out to your BLA advisor for assistance with bringing you submission into compliance with DOR requirements. These problems are usually in the areas of including unacceptable characters (Including any character that is not a number or a letter) or the overall number of characters in columns B or H (Having more than 32 characters).

LA-13 Upload
Tax Base Levy New Growth

Re-processed incorrect records successfully.

Status: LA-13 Bulk Upload : FORM ENTERED

2024

Jurisdiction Fiscal Year 2024

File Name: GrowthReportingTemplate FY23 9-27-22 FINAL REV.xlsx

File Upload Date: 5/17/2023 11:43:47 AM

Status: Completed

Remarks:

Correct Record(s): 259 Click the 'Save New Growth Data' button at the bottom of the screen to save the correct new growth data.

Show 30 entries

Parcel ID/PP Act#	Loc ID/PP Bus Name	St Num	St Alpha	St Name	Class Id	Flag Code	Growt
110640	CENTRE AVE SUNOCO	336		CENTRE AV	502		New Item
103000	COLONY CENTER FOR HEALTH	277		WASHINGTON ST	502		New Item

After correctly completing the reprocessing of any records, there is a notice that Re-Processing was successful.

The number of Correct Records is listed and should be checked against the number of records on the Template.

103160	RT 18 SUPER STORE	336		WASHINGTON ST	502
100270	PRESIDENTS LANDSCAPE & DESIGN	22		HJELM ST	502
107340	AFFILIATED APPRAISAL & RE CNS	54		MARGARET RD	501
113300	MILTON RENTS INC	446		BEDFORD ST	502

Showing 1 to 30 of 259 entries

1 2 3 4 5 ... 9 Next

Save New Growth Data

Proceed to the bottom of the page and click on the “Save New Growth Data” button.

LA-13 Upload

Tax Base Levy New Growth

Correct data saved successfully.

Status: LA-13 Bulk Upload : FORM ENTERED

2024

Jurisdiction Fiscal Year 2024

File Name: GrowthReportingTemplate FY23 9-27-22 FINAL REV.xlsx

File Upload Date: 5/17/2023 11:43:47 AM

Status: Completed

Remarks:

After correctly saving the data, there is a notice that the data was saved successfully.

LA-13
 Tax Base Levy Growth
 Status: NO STATUS FOUND
 BLA-LA4 : FORM ENTERED
 BLA-LA13A : NO STATUS FOUND

2024

Jurisdiction: [] Fiscal Year: 2024 [Go]

Property Class	(A) All Prior Year Abatement No.	(B) All Prior Year Abatement Values	(C) New Growth Valuation	(D) PY Tax Rate	(E) Tax Levy Growth
RESIDENTIAL					
SINGLE FAMILY (101)	0	0	9,416,340		
CONDOMINIUM (102)	0	0	4,409,000		
TWO & THREE FAMILY (104 & 105)	0	0	0		
MULTI - FAMILY (111-125)	0	0	0		
VACANT LAND (130-132 & 106)	0	0	382,900		
ALL OTHERS (103, 109, 012-018)	0	0	397,500		
TOTAL RESIDENTIAL	0	0	14,605,740	12.42	181,403
OPEN SPACE	0	0	0		
OPEN SPACE - CHAPTER 61, 61A, 61B	0	0	0		
TOTAL OPEN SPACE	0	0	0	0.00	0
COMMERCIAL	0	0	0		
COMMERCIAL - CHAPTER 61, 61A, 61B	0	0	0		
TOTAL COMMERCIAL	0	0	0	27.45	0
INDUSTRIAL	0	0	223,500	27.45	6,135
PERSONAL PROPERTY	0	0	14,050,840	27.45	385,696
TOTAL REAL & PERSONAL	0	0	28,880,080		573,234

Tracking Certification **Taxrate** Balance She

Tax Rate - Assessments

- Omitted & Revised
- Assessment Report
- Audited Personal Property
- LA-13A
- LA-4
- LA-13 Upload
- View/Edit/Submit Growth
- LA-13

Taxrate

Tax Rate

I see the
can I fix

After the data is saved you can click on the LA-13 section under Tax Rate – Assessments

View the uploaded results.

View/Edit/Submit Growth
View/Edit/Submit Growth
Status: FORM UNLOCK FOR DLS

2024

Unlock for DLS Unlock for Community

Jurisdiction: Fiscal Year: 2024 Go

Sort Order: 1d Asc

Show: 30 entries (Number of Records found: 139)

Manage New Growth Data	Parcel ID/PP Act#	Loc ID/PP Bus Name	St Num	St Alpha	St Name	Class Id	Flag Code	Growth Reason	Residential Growth	Open space Growth	Commercial / Personal Growth	Industrial Growth	Chapter Growth	Open Space Chapter Growth	REV
Edit Delete	019/012.0-0000-0005.0	F_631008_3033262	24		GROTON SCHOOL ROAD	101		EXTENSIVE ENTIRE HOUSE RENOVATION	71200	0	0	0	0	0	
Edit Delete	019/012.0-0000-0151.0	F_633706_3033281	120		PLEASANT STREET EXT	101		NEW CONSTRUCTION	175400	0	0	0	0	0	
Edit Delete	019/012.0-0000-0152.0	F_633806_3033432	122		PLEASANT STREET EXT	101		NEW CONSTRUCTION	170900	0	0	0	0	0	
Edit Delete	019/012.0-0000-0153.0	F_634061_3033390	124		PLEASANT STREET EXT	101		NEW CONSTRUCTION	367000	0	0	0	0	0	
Edit Delete	019/012.0-0000-0154.0	F_634132_3033393	123		PLEASANT STREET EXT	101		NEW CONSTRUCTION	374500	0	0	0	0	0	
Edit Delete	019/012.0-0000-0155.0	F_634231_3033425	121		PLEASANT STREET EXT	101		NEW CONSTRUCTION	394000	0	0	0	0	0	
Edit Delete	019/012.0-0000-0156.0	F_634395_3033252	119		PLEASANT STREET EXT	101		NEW CONSTRUCTION	327600	0	0	0	0	0	
Edit Delete	019/013.0-0000-0174.0	F_635544_3032134	138		WASHINGTON STREET	101		NEW CONSTRUCTION	106500	0	0	0	0	0	
Edit Delete	019/013.0-0000-0070.0	F_635430_3032067	136		WASHINGTON STREET	101		NEW CONSTRUCTION	276700	0	0	0	0	0	
Edit Delete	019/013.0-0012-0001.0	F_634974_3031854	128		WASHINGTON STREET #A	102		NEW CONSTRUCTION	375200	0	0	0	0	0	
Edit Delete	019/013.0-0012-0002.0	F_634974_3031854	128		WASHINGTON STREET #B	102		NEW CONSTRUCTION	375200	0	0	0	0	0	
Edit Delete	019/013.0-0015-0001.0	F_635088_3031904	130		WASHINGTON STREET #A	102		NEW CONSTRUCTION	375200	0	0	0	0	0	
Edit Delete	019/013.0-0015-0002.0	F_635088_3031904	130		WASHINGTON STREET #B	102		NEW CONSTRUCTION	375200	0	0	0	0	0	
Edit Delete	019/015.0-0000-0014.0	F_642590_3030596	48		WRIGHT ROAD	101		NEW CONSTRUCTION	485000	0	0	0	0	0	
Edit Delete	019/015.0-0000-0031.0	F_641491_3030866	25		WRIGHT ROAD	109		NEW CONSTRUCTION	397500	0	0	0	0	0	
Edit Delete	019/016.0-0000-0055.0	F_646452_3031410	12		MULBERRY CIRCLE	101		ADDITION AND PORCH, FULL BATH	45140	0	0	0	0	0	
Edit Delete	019/017.0-0000-021.0	F_647429_3030856	1		HEMCO WAY	400		TYP ON 50000 SF ADDITION	0	0	0	223500	0	0	

Tracking Certification **Taxrate** Balance Sheet

Tax Rate - Assessments

- Omitted & Revised
- Assessment Report
- Audited Personal Property
- LA-13A
- LA-4
- LA-13 Upload
- View/Edit/Submit Growth
- LA-13

Taxrate

Tax Rate

I see the can I fix

Edits and Deletions can be made in the “View/Edit/Submit Growth” section.

Signatures

Assessor

The Board of Assessors has reviewed all classes of property and agree that, in our judgment, the new growth adjustments result in fair and equitable assessments both within and between all classes of property.

Check to add signature

[Save](#) [Submit](#)

Why are my buttons disabled?

When you are satisfied that all the data is correct, the Board of Assessors must SIGN SAVE SUBMIT at the bottom of the page to complete the Upload process.

Remember to fill in the abatement information on the LA-13 page, SIGN and SUBMIT at the bottom of that page to complete the LA-13 process.