Municipal Clerk & Assessor Directory Certification Process

Jetton 1 Sign in DLS Gateway then select Directory tab 2 Verify department list contains all Board Members and Staff with <u>valuation</u> responsibility and email address is correct 3 Enter updates: If you want to Then Verify data only, with no update Click on Assessors link under Department and proceed to <u>step 4</u> Remove individual • Click on individual name in list • Select Delete at bottom of page • "Yes" to question; "are you sure you want to Delete?" (near top of page) Update individual's email address • Click on individual name in list • Update individual's email • Click on Assessors link under Department column or click any Assessor's name in list • Update individual's email • Click on Assessors link under Department column or click any Assessor's name in list • Update individual's email • Click on Assessor's name in list • On left menu, select Add/Edit Person/Position • Enter Position Title1 • Functional Role2 (drop down arrow) • Enter legal name • Department Head ³ • Official Phone Information – enter extension ⁴ • Elected/Term Info ⁶ (drop down arrow) • Web & Email Information ⁷ • Click individual's name in the Directory Tree on the right to enter Individual's page.	Step		Action	
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4 Department Information page	4			
Verify:		-		
		Address		
		Phone number enter extension if needed to reach your office Email address for general communication		
-		 Email address for general communication Office hours 		
		 Office hours Indicate if the Board is Part Time or Full Time 		
 Click Save if any changes were made 				
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5 Certification:	5	Certification:		
Click Assessor Certification on the left menu system, under Assessor		Click Assessor Certit	fication on the left menu system, under Assessor	
Management.		Management.	·	
Select the Fiscal Year and click Go		Select the Fiscal Yea	r and click Go	

Municipal Clerk & Assessor Directory Certification Process

6	Assessor
	Check box – an electronic signature will appear with your name populated
	 Click "Submit to Clerk for Certification" - system responds
	"Assessor Certification Request sent to the Clerk successfully"
	Clerk
	• Check box – an electronic signature will appear with your name populated
	Click "Do Clerk Certification" – system responds
	"Clerk's Certification Completed"

Annual Certification of staffing is required by **July 1**. Throughout the year it is also required whenever a Board Member or valuation staff change.

For information or clarification please contact:

Program Coordinator, Linda Bradley, at 617.626.2394 or bradleyl@dor.state.ma.us.

Notes:

¹ Assessor, Assistant, Director, Clerk or any title your community uses. Note; if the title is too long the person's name will not show in the Directory Tree. e.g. Director of Assessing

² Only select for Chairman of the Board or "Assessment Director" (person in charge of assessments.) This could be any key assessment staff member. In some cases may be the Assessing Clerk. Only 1 person can have this designation.

³ The default is "No". Choose "Yes" for the head of the department. The Directory will only accept 1 person with this designation. Each office should have one.

⁴ The main office phone number will carry from the *Assessing Department* page.

⁵ Board members:

- *Elected:* check box and select a date from the Elected Date drop-down list. **Note: If date is not listed; the Town Clerk needs to enter the town election date by selecting "Election and Meeting Dates" on the left menu. Enter the Term Expires date and check "on Board" in the Assessor Information box.
- Appointed: enter Appointment date, Term Expires date and check "on Board".
 **Note: For an appointment to fill a vacancy or complete the term of an elected position vacated, list as Appointed with an Appointment date, Term Expires date and check "on Board".

Assistant: for all staff with valuation responsibility not on the Board, check "Appointed" and enter an "Appointment date". Term Expires date is left blank; check "Assistant" in the Assessor Information box.

<u>Clerks or non-valuation staff</u>: leave this section blank and select "Other" in the Assessor Information block.

⁶ If left blank, this information will carry from *Assessing Department* page. Please update to individual's town email address.

⁷ Enter when the community has limited office hours and you would like to be contacted on your personal phone or email. Personal Information will not be available to other communities unless you select "Yes" to "Disclose Personal Info." DLS staff will have access to this information with the default "No" selected on the page.