

Municipal Clerk & Assessor Directory Certification Process

Step	Action														
1	Sign in DLS Gateway then select Directory tab														
2	Verify department list contains all Board Members and Staff with <u>valuation responsibility</u> and email address is correct														
3	<div>Enter updates:</div> <table> <tr> <th><i>If you want to...</i></th><th><i>Then...</i></th></tr> <tr> <td>Verify data only, with no update</td><td>Click on Assessors link under Department and proceed to step 4</td></tr> <tr> <td>Remove individual</td><td> <ul style="list-style-type: none"> Click on individual name in list Select Delete at bottom of page "Yes" to question; <i>"are you sure you want to Delete?"</i> (near top of page) </td></tr> <tr> <td>Update individual's email address</td><td> <ul style="list-style-type: none"> Click on individual name in list Update address on bottom left Save </td></tr> <tr> <td>Add new person</td><td> <ul style="list-style-type: none"> Click on Assessors link under Department column <i>or</i> click any 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 Head³ Official Phone Information – enter extension⁴ Elected/Term Info⁵ (drop down arrow) Web & Email Information⁶ Personal Phone & Email Information⁷ Click "Save" at the bottom of page </td></tr> <tr> <td>Update another person within office</td><td>Click individual's name in the Directory Tree on the right to enter Individual's page.</td></tr> <tr> <td>Updating is complete</td><td>Click on "Assessors" on Directory Tree on the right and proceed to step 4</td></tr> </table>	<i>If you want to...</i>	<i>Then...</i>	Verify data only, with no update	Click on Assessors link under Department and proceed to step 4	Remove individual	<ul style="list-style-type: none"> Click on individual name in list Select Delete at bottom of page "Yes" to question; <i>"are you sure you want to Delete?"</i> (near top of page) 	Update individual's email address	<ul style="list-style-type: none"> Click on individual name in list Update address on bottom left Save 	Add new person	<ul style="list-style-type: none"> Click on Assessors link under Department column <i>or</i> click any 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 Head³ Official Phone Information – enter extension⁴ Elected/Term Info⁵ (drop down arrow) Web & Email Information⁶ Personal Phone & Email Information⁷ Click "Save" at the bottom of page 	Update another person within office	Click individual's name in the Directory Tree on the right to enter Individual's page.	Updating is complete	Click on "Assessors" on Directory Tree on the right and proceed to step 4
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4	Department Information page Verify: <ul style="list-style-type: none"> Address Phone number enter extension if needed to reach your office Email address for general communication Office hours Indicate if the Board is Part Time or Full Time Click Save if any changes were made 														
5	Certification: <ul style="list-style-type: none"> Click Assessor Certification on the left menu system, under Assessor Management. Select the Fiscal Year and click Go 														

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6	<p>Assessor</p> <ul style="list-style-type: none">• 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” <p>Clerk</p> <ul style="list-style-type: none">• Check box – an electronic signature will appear with your name populated• Click “Do Clerk Certification” – system responds “Clerk’s Certification Completed”
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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.

Clerks or non-valuation staff: 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.