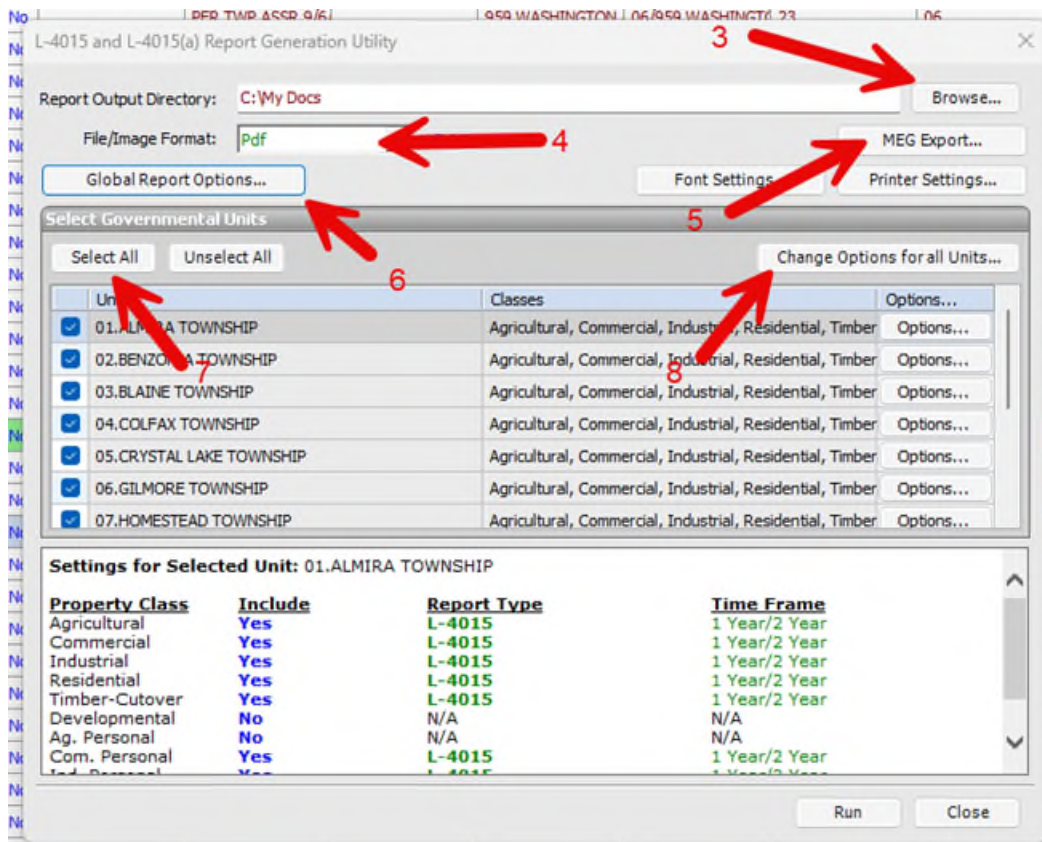


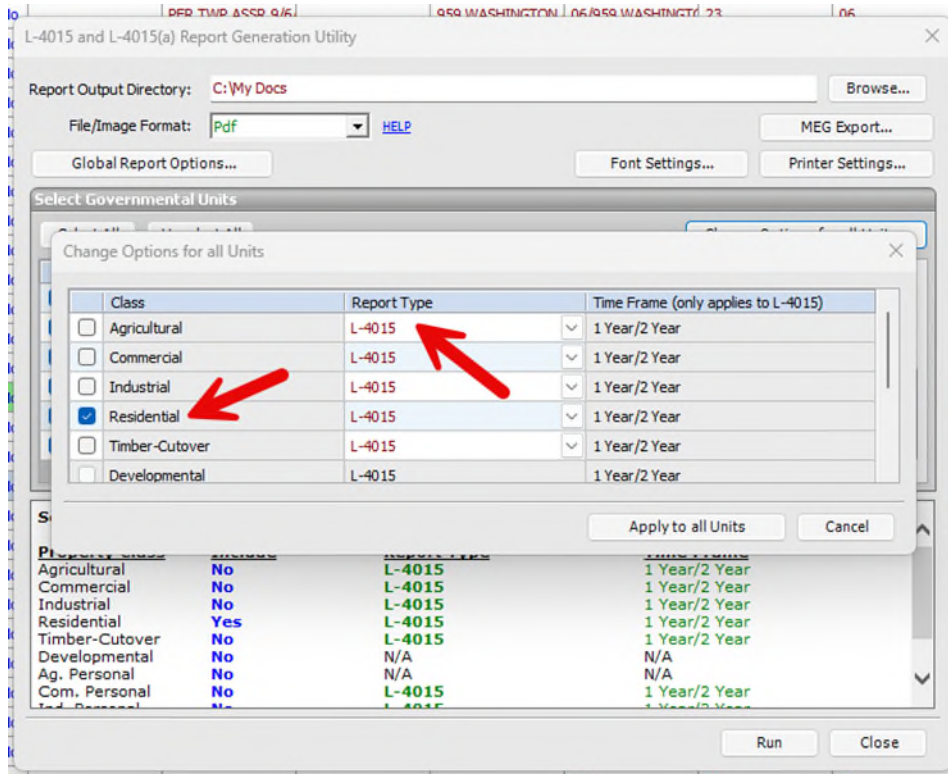
Instructions for Importing Form 4618 (L-4015) Sales Study List into MEG

Follow the following instructions to export data for the L-4015 from BS&A.

1. In BS&A go to 'Utilities' and then 'Equalization/MEG Reporting Tools'.
2. Click on 'L-4015 and L-4015(a) Utility'.
3. Select the 'Report Output Directory' by clicking 'Browse'.
4. Select 'Pdf' from File/Image Format drop down menu.
5. Click 'MEG Export' window & select 'Include MEG Export', click 'Browse' to select the 'Export Directory' and then name the 'Export File'. Click 'Close'
6. In 'Global Report Options...' select the options wanted to export.
 - a. Types of Sale
 - b. Terms of Sale
 - c. The following options must be the only items selected: Include Grantor/Grantee, Include Sale Price & Include Terms of Sale. Additional options will create an error in MEG.
 - d. Filters (this is where outliers can be removed (i.e., 80/20 or 90/10))
7. Select the Governmental Unit(s) wanted to export.
 NOTE: If there is a county wide class such as "XXXXX.County Name" be sure that unit is not selected.



- In 'Change Options for all Units...' select the class(es) wanted to export (**do not select any personal property**). The 'Report Type' should only be L-4015. Click 'Apply to all Units'.



NOTE: If there are sale studies for more than one class, they can now be imported separately. If there is a sales study in a class other than residential, the toggle switch for that class(s) in the MEG **L-4015a** module must be turned on to indicate "No Parcels in Class or Form Needed".

- Click Run
- When utility has been ran click 'OK" then click 'Close' then click 'Yes' to save the L-4015/L-4015a results for all selected units/property classes for L-2793/L-4018 use.

Following the following instructions to import L-4015 exported data into MEG.

To perform a county import:

- Sign into MEG and go to the Form 4618 (L-4015) module in the correct equalization year and correct county.
- Click on 'County Import' at the top right.
- In the pop-up screen select the classification(s) wanted to import.
- Browse out to where the saved the file from step 5 on page 1.
- Click 'Import'
- Once imported click 'Send All to Local Units'. Once sent reconciliation (see below if reconciliation in MEG is not being utilized) with the local units can begin.

To perform a single unit import:

- The BS&A export must only contain a single unit's data (step 7 on page 1).
- Sign into MEG and go to the Form 4618 (L-4015) module.

3. Click on the pencil icon to the right of the local unit's name.
4. Click 'Unit Import' at the top right.
5. In the pop-up screen select the classification(s) wanted to import. Browse out to where the file is saved from step 5 on page 1.
6. Click 'Import'.
7. Click 'Save' then 'Send to Local Unit' for reconciliation (see below if reconciliation in MEG is not being utilized).

To reconcile:

The Assessor of Record or the Deputy Assessor can add and contend (remove) sales in the study and submit the form back to the County for review. It is not required that the county and local unit utilize the reconciliation process in MEG.

If the county wishes to **bypass reconciling** with local units in MEG, click 'Submit' within each local unit or click 'Submit All' for the county. There is a pop-up that request confirmation that reconcile in MEG with the local unit is unwanted before submission.

Assessors:

1. To add a sale, click on 'Add Parcel' and enter the required sale information including a comment as to why the sale is being added, then click 'Add'.
2. To request the removal of a sale, click on the 'Contend' toggle at the end of the row of the sale that is to be removed. In the pop-up include a comment as to why the sale should be removed then click 'Contend' in the pop-up.
 - a. It is good communication practice and is essential in the reconciliation process to add explanations for the requests to add and/or remove study parcels.
3. When the review is completed, click 'Save' and then 'Submit' and e-mail the equalization department to inform them that the review has been completed.

OR
4. If there are no parcels to add or contend, simply click 'Submit' and e-mail the equalization department that the review has been completed.

Equalization:

1. Assigned county staff can then review the sales added by looking for a check mark in the 'LU' column and for contended sales by looking for a check mark in the contend column.
2. To view notes regarding contended parcels, go to the 'Contention' tab at the top of the screen by the classifications.
3. To remove a sale that the assessor has contended, and that is agreed upon, click the trash icon for that sale.
4. If the county agrees a sale should be included that the assessor has added nothing has to be done. The sale will stay in the study.

NOTE: County equalization departments and assessors will want to make sure that parcels added or removed from the L-4015 in MEG are also added or removed from their active database.

Once the form has been reconciled with the equalization department and the assessor or deputy assessor, the form shall be saved then submitted in MEG by the Equalization Director or Deputy Equalization Director to the STC by clicking 'Submit'.