OASYS eTRIM - Instructions for Hearing Date Module

The **Hearing Date** module allows taxing authorities to enter and manage information about both tentative and final public budget hearings directly from the OASYS eTRIM dashboard. This feature allows taxing authorities to confirm when hearings were held, or if the hearing was rescheduled or recessed. This is particularly helpful for the Department of Revenue (Department) to track scheduled hearing dates should an emergency such as a natural disaster arise.

While this module interacts with both the DR-420 and DR-487 series, taxing authorities should refer to the user guides available in the OASYS eTRIM **Resources** tab for instructions on completing those forms.

Instructions are organized into two parts covering the following topics:

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DR-487 Hearing Date	

Part A - Instructions for Non-School Taxing Authorities:

Tentative Hearing Date

If the taxing authority has not entered and saved hearing details on *Certification of Taxable Value* (Form DR-420) for its operating levy, the **Hearing Dates** section will indicate "DR-420 Series date not entered" under the applicable hearing type.



If the taxing authority has entered and saved hearing details on Form DR-420 for its operating levy, this section displays the hearing details currently saved.



The taxing authority enters the hearing details in the **First Public Budget Hearing** section of Form DR-420, as shown in the below example.



NOTE: Taxing authorities may edit the date, time, and location of the initially scheduled public budget hearing by updating these fields on Form DR-420. Once the DR-420 Series is certified, the taxing authority will <u>no longer be able to edit these fields</u>; revise hearing data using the **Reschedule Meeting** or **Recess Meeting** buttons.

OASYS eTRIM identifies the initial data for the First Public Budget Hearing as "tentative" and displays the hearing details. Three action buttons also display: **Complete Meeting**, **Reschedule Meeting**, and **Recess Meeting** (if this action is used, the **Reconvene Meeting** button also displays). Instructions for each action are provided in the same order as they display on the screen. Depending on circumstances as the TRIM cycle progresses, some taxing authorities may use all these actions, while others will use only **Complete Meeting**.

If the **Reschedule Meeting** or **Recess Meeting** actions are used, the taxing authority should return to the dashboard after the hearing is held to reflect the hearing as **Complete**.

Complete Meeting Button

If the hearing is held and completed as scheduled, click **Complete Meeting**.



The **Tentative Hearing Date** section updates to display the completed hearing details, and the action buttons no longer display.

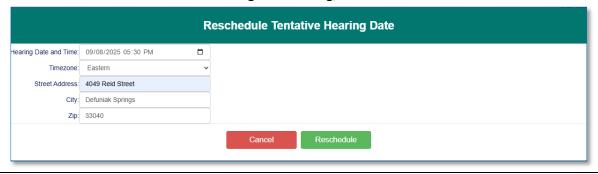


Reschedule Meeting Button

If the hearing is rescheduled, click **Reschedule Meeting**.



The **Reschedule Tentative Hearing Date** input screen displays. NOTE: If rescheduling the final hearing date, the screen is labeled **Reschedule Final Hearing Date**. Enter the new meeting details into the respective fields and click **Reschedule**. To abandon rescheduling the hearing, click **Cancel**.



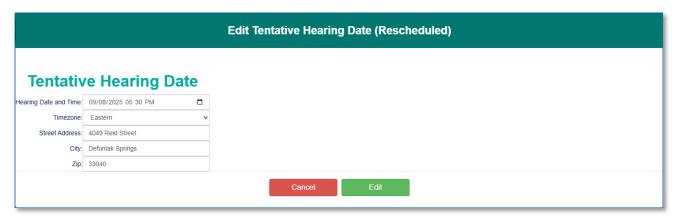
The **Hearing Dates** section updates. The initial date/time/location displays first, and a new **Rescheduled Date/Time/Location** section displays details for the rescheduled hearing. A taxing authority may reschedule a public budget hearing multiple times. Each time a hearing is rescheduled, a new entry displays on the dashboard.



Edit Meeting Button

The **Edit Meeting** button becomes available once a hearing has been rescheduled.

Click **Edit Meeting** to modify the details of the rescheduled hearing. The **Edit Tentative Hearing Date** (**Rescheduled**) input screen displays. NOTE: If the final hearing date is being rescheduled, the screen is labeled **Edit Final Hearing Date** (**Rescheduled**). Edit the meeting details in the respective fields and click **Edit**. To abandon the changes, click **Cancel**.



Recess Meeting Button

If there is a temporary suspension of a meeting from either the **Tentative Hearing Date** section or the **Rescheduled** section, click **Recess Meeting**.



The **Recess Tentative Hearing Date** screen displays. NOTE: If the final hearing date is recessing, the screen is labeled **Recess Final Hearing Date** (**Rescheduled**). Enter the date and time the hearing recessed. Click **Recess**. To abandon recessing the hearing, click **Cancel**.



When a user clicks **Recess**, the **Hearing Dates** section updates and displays the date and time that the meeting was recessed. The **Reconvene Meeting** action button also displays.



Reconvene Meeting Button

Click **Reconvene Meeting** to input further hearing activity. The **Reconvene Tentative Hearing Date** screen displays. NOTE: If the final hearing date is being rescheduled, the screen is labeled **Reconvene Final Hearing Date**. Enter the date and time the hearing reconvened. Click **Reconvene**. To abandon reconvening the hearing, click **Cancel**.



When a user clicks **Reconvene**, the **Hearing Dates** section updates and displays the date and time the meeting was reconvened.

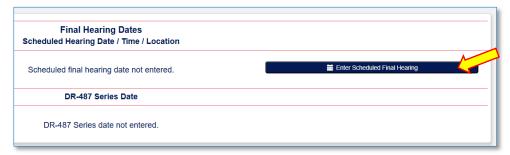


Click **Edit Reconvened Date/Time** if the hearing date or time changes or needs to be corrected.

Once the hearing is complete, click **Complete Meeting**.

Final Hearing Date

Click Enter Scheduled Final Hearing under the Final Hearing Dates section of the OASYS eTRIM dashboard.



NOTE: A user may enter final hearing details at any time, regardless of the status of the DR-420 Series or the tentative public budget hearing.

The **Add Final Hearing Date** screen displays. Enter the final hearing details into the respective fields and click **Add**. To abandon entering final hearing details, click **Cancel**.



The **Final Hearing Dates** section updates and the final hearing details display. Three action buttons also display: **Complete Meeting**, **Edit Meeting**, **Reschedule Meeting**, and **Recess Meeting** (if this action is used, the **Reconvene** button displays). NOTE: The action buttons function in the same manner as described for the first hearing (see prior sections of these instructions). Some taxing authorities may use all of these actions, while others will use only **Complete Meeting**. If the **Reschedule Meeting** or **Recess Meeting** actions are used, the taxing authority should return to the dashboard after the hearing is held and click **Complete Meeting** to reflect the hearing as complete.



DR-487 Hearing Date

The last section of the Hearing Date module is labeled **DR-487 Hearing Date**.



Initially, the DR-487 Series Date section displays "DR-487 Series date not entered." Once a user clicks the **Enter Scheduled Final Hearing** button and the hearing details are saved, the dashboard updates and the final hearing details display in this section.



Any changes to the final hearing details, made by clicking the **Edit Meeting**, **Reschedule Meeting**, or **Recess Meeting** buttons, will also update here. The system also populates this data to the *Certification of Compliance* (Form DR-487). If the taxing authority revises the final hearing date when the Form DR-487 is certified, the revised hearing details will update in this section.

Part B - Instructions for School Taxing Authorities:

Final Hearing Date

If the taxing authority has not entered and saved hearing details on *Certification of School Taxable Value* (Form DR-420S) for its operating levy, the **Hearing Dates** section will indicate "DR-420 Series date not entered" under the applicable hearing type.



The taxing authority enters the hearing details in the **Final Public Budget Hearing** section of Form DR-420S. The input screen is shown here for reference.



Once the taxing authority has entered and saved hearing details on Form DR-420S, the dashboard updates and displays the hearing details.



Three action buttons also display: **Complete Meeting**, **Reschedule Meeting**, and **Recess Meeting** (if this action is used, the **Reconvene Meeting** button also displays). Instructions for each action are provided in the same order as they display on the screen. Depending on circumstances as the TRIM cycle progresses, some taxing authorities may use all of these actions, while others will use only **Complete Meeting**. If the **Reschedule Meeting** or **Recess Meeting** actions are used, the taxing authority should return to the dashboard after the hearing is held to mark the hearing as "Complete."

Complete Meeting Button

If the hearing is held and completed as scheduled, click Complete Meeting.



The **Final Hearing Date** section updates to display the completed hearing details, and the action buttons no longer display.



Reschedule Meeting Button

If the hearing is rescheduled, click **Reschedule Meeting**.



The **Reschedule Final Hearing Date** input screen displays. Enter the new meeting details into the respective fields and click **Reschedule**. To abandon rescheduling the hearing, click **Cancel**.



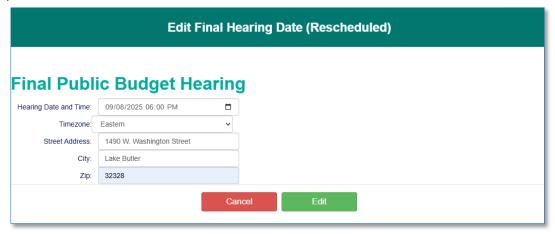
The **Hearing Dates** section updates. The initial date/time/location is displayed first, and a new **Rescheduled Date/Time/Location** section displays the details for the rescheduled hearing. A taxing authority may reschedule a public budget hearing multiple times. Each time a hearing is rescheduled, a new entry displays on the dashboard.



Edit Meeting Button

The **Edit Meeting** button becomes available once a hearing is rescheduled.

Click **Edit Meeting** to modify the details of the reschedule hearing. The **Edit Final Hearing Date** (**Rescheduled**) screen displays. Update the meeting details in the respective fields and click **Edit**. To abandon the changes, click **Cancel**.



Recess Meeting Button

If there is a temporary suspension of a meeting, click Recess Meeting.



The **Recess Final Hearing Date** screen displays. Enter the date and time the hearing recessed. Click **Recess**. To abandon recessing the hearing, click **Cancel**.



When the user clicks **Recess**, the **Hearing Dates** section updates and displays the date and time that the meeting was recessed. The **Reconvene Meeting** action button also displays.



Reconvene Meeting Button

Click **Reconvene Meeting** to input further hearing activity. The **Reconvene Final Hearing Date** screen displays. Enter the date and time the hearing reconvened. Click **Reconvene**. To abandon reconvening the hearing, click **Cancel**.



When the user clicks **Reconvene**, the **Hearing Dates** section updates and displays the date and time the meeting was reconvened.



Click **Edit Reconvened Date/Time** if the hearing date or time changes or needs correction.

Once the hearing is complete, click **Complete Meeting**.

DR-487 Hearing Date

The last section of the Hearing Date module is labeled **DR-487 Hearing Date**. This section displays "DR-487 Series date not entered" until the taxing authority enters the hearing date details on Form DR-420S and certifies the form. The system also populates this data to Form DR-487. If the taxing authority revises the final hearing date when Form DR-487 is certified, the revised hearing details will update in this section.