

# OASYS Electronic Truth in Millage

Form DR-420 Series User Guide

For Property Appraisers



Florida Department of Revenue

Property Tax Oversight

May 2025

## Contents

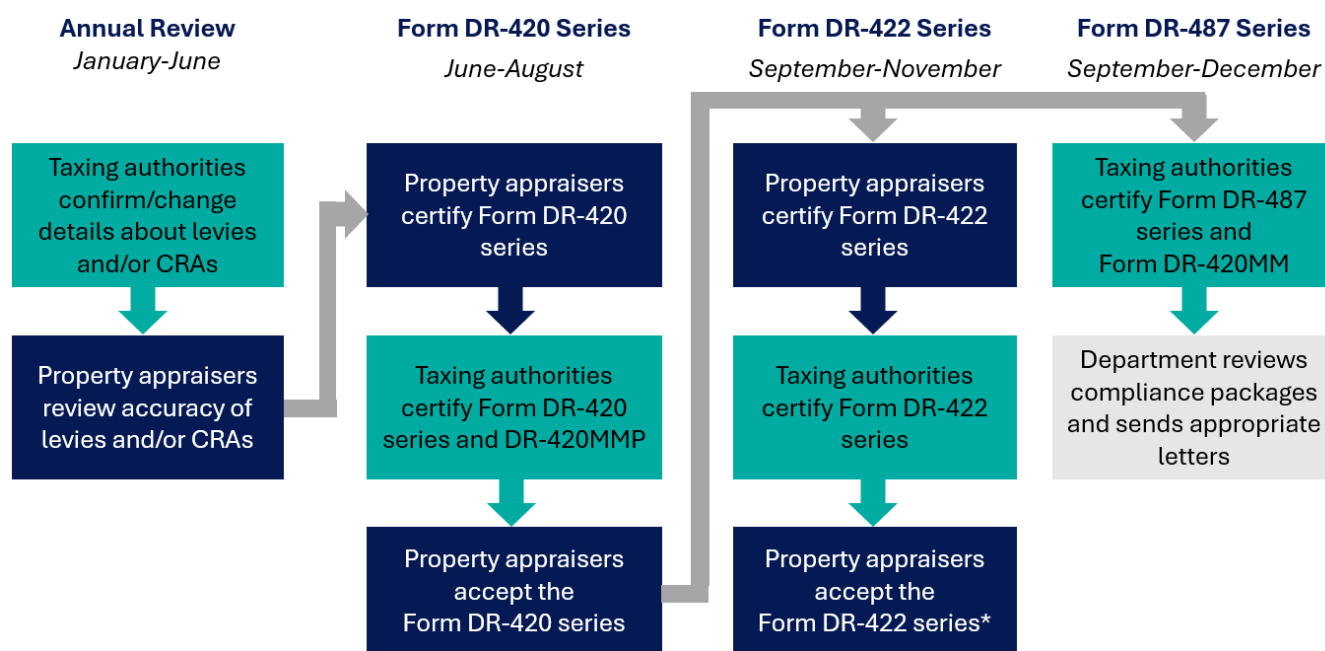
1. Introduction.....	3
2. Getting Started .....	5
3. The Property Appraiser Worklist.....	6
4. Cancel/Save/Print Buttons .....	11
5. Manually Completing Section I of the Form DR-420 Series .....	13
6. Certifying the DR-420 Series Forms to the Taxing Authorities.....	16
7. Reviewing and Accepting the DR-420 Series from the Taxing Authorities.....	18
Addendum A - Terminology .....	20
Addendum B - TRIM Forms .....	21
Addendum C - Important TRIM Dates.....	22
Addendum D - Instructions for Batch Upload of Data .....	23
Addendum E - Converting Excel Template to .CSV or .TXT .....	28

## 1. Introduction

**About the Truth in Millage (TRIM) Process:** The TRIM process informs taxpayers and the public about the legislative process by which local taxing authorities determine ad valorem (property) taxes. Taxing authorities and property appraisers must follow chapter 200 of the Florida Statutes (F.S.), which governs TRIM as well as chapter 12D-17, Florida Administrative Code (F.A.C.), which states the specific requirements for TRIM compliance. The Department of Revenue (Department) publishes various TRIM products which provide additional information:

- [General TRIM overview](#)
- [Detailed TRIM information](#)

The TRIM cycle runs with the tax year from January to December. The basic TRIM cycle is depicted here (see [addendum B](#) for form names mentioned in this graphic):



\* Certification of a post-VAB Form DR-422 may extend this activity into the next calendar year.

Property appraisers, taxing authorities, and Property Tax Oversight (PTO) staff perform required TRIM duties in the OASYS electronic Truth in Millage (eTRIM) application within the [OASYS ePortal](#). To learn about general OASYS functionality, please review the [OASYS ePortal Inside PTO module](#).

Fundamental TRIM information is available in addenda to this user guide; see addendum A for important TRIM-related terminology, addendum B for a complete list of TRIM forms, and addendum C for important TRIM dates.

The initial step for property appraisers in the annual TRIM cycle is to certify taxable value to the taxing authorities in the county (see property appraiser's June-August responsibilities in the TRIM cycle graphic above). Forms that comprise the DR-420 series are the mechanism for value certification. Property appraisers must input and certify valuation data for **Section I** of the Form DR-420 series for all principal taxing authorities, dependent special districts, and Municipal Service Taxing Units (MSTUs) within their county. If there is a water management district in the county, the property appraiser must

also input and certify valuation data for any basin the district levies within the county. OASYS eTRIM generates a custom worklist for the property appraiser. The worklist is based on a confirmation process taxing authorities complete in OASYS eTRIM during the annual review.

**About This User Guide:** This user guide contains instructions for property appraisers to complete and certify the TRIM forms which comprise the Form DR-420 series:

Form number	Form Title
Form DR-420	<i>Certification of Taxable Value</i>
Form DR-420S	<i>Certification of School Taxable Value</i>
Form DR-420DEBT	<i>Certification of Voted Debt Millage</i>
Form DR-420TIF	<i>Tax Increment Adjustment Worksheet</i>

[Section 5](#) of this user guide details the manual process for inputting data for the Form DR-420 series. Data input for the Form DR-420 series can also be accomplished through batch upload of data. The procedure for batch uploads is described in addendum D. [Section 6](#) details the process for final certification once data has been input and validated as complete by the OASYS eTRIM system.

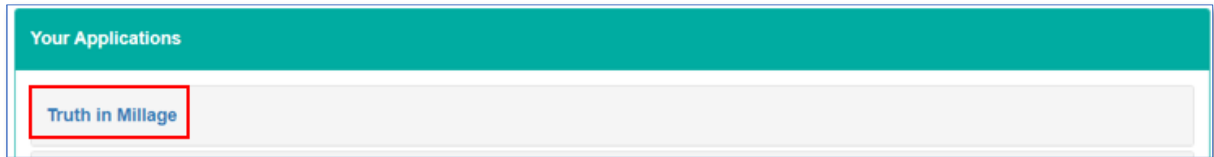
This user guide was developed to provide user support and assistance with the OASYS eTRIM application. This table shows the five user roles and the access levels for each:

User Role	Enter Data	Certify Data	View Data	Receive System Emails
User Primary with Certification	X	X	X	X
User Primary	X		X	X
User Backup	X		X	
View Only with Notifications			X	X
View Only			X	

The property appraiser's OASYS access manager can modify user roles and establish access for users.

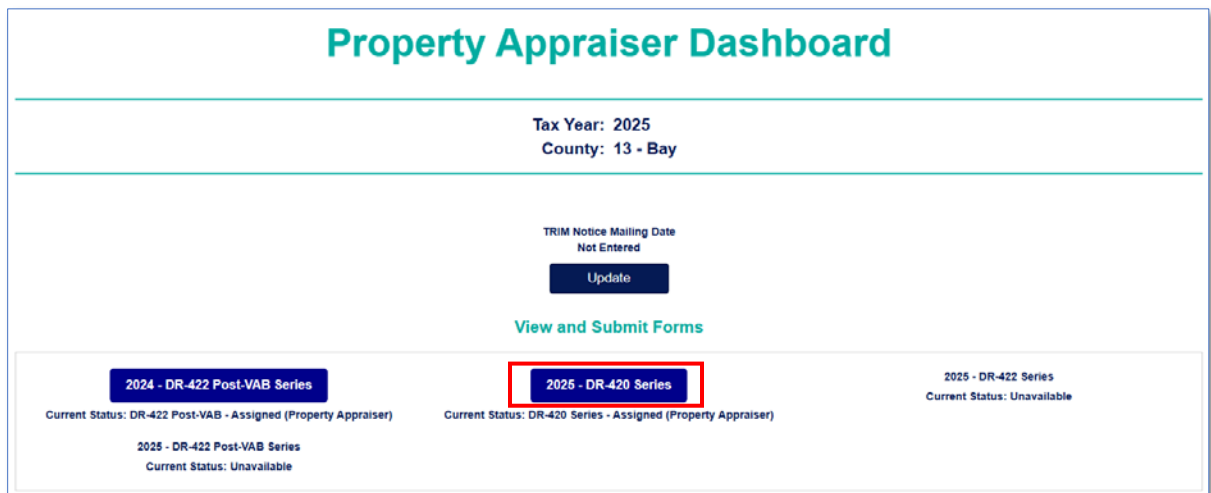
## 2. Getting Started

- 2.1 Log into [OASYS ePortal](#).
- 2.2 Navigate to the **Your Applications** section in your **OASYS ePortal Dashboard**.  
Click **Truth in Millage** to launch the OASYS eTRIM application.



A custom **OASYS eTRIM Dashboard** will display.

- 2.3 From the **OASYS eTRIM Dashboard**, click the **[Year] - DR-420 Series** button.



The **DR-420 Series - Property Appraiser Worklist** will display.

### 3. The Property Appraiser Worklist

The **DR-420 Series - Property Appraiser Worklist** displays differently depending on whether all taxing authorities within the property appraiser's county have completed the annual review process. During the annual review, which opens for taxing authorities in January each year, the taxing authorities confirm, modify, or discontinue existing levies and community redevelopment areas (CRAs). Taxing authorities also add any newly established levies or CRAs. This process is described in detail in the *OASYS Truth in Millage Taxing Authority User Guide*. Changes made to **OASYS eTRIM** by taxing authorities during the annual review are reviewed for proper documentation and accuracy by PTO's TRIM team.

If all taxing authorities within the county have completed their annual review, the worklist displays instructions to review the list of forms. A button labeled **Accept DR-420 Series** displays below the instructions.

DR-420 Series - Property Appraiser Worklist	
Tax Year:	2025
County:	22 - Columbia
Series Status:	DR-420 Series - Assigned (Property Appraiser)
<b>Annual review is complete for all taxing authorities in your county.</b> Review the list of forms presented below and click <b>Accept 420 Series</b> if all levy and CRA information is correct. if any levy or CRA information is incorrect, <a href="#">Contact TRIM</a>	
<a href="#">Accept DR-420 Series</a>	

If the annual review is still underway for any taxing authority within the county, the worklist displays a summary of the status of the annual review. This is an example of the message that would display in this case:

DR-420 Series - Property Appraiser Worklist	
Tax Year:	2025
County:	28 - Flagler
Series Status:	DR-420 Series - Assigned (Property Appraiser)
<b>Annual review is complete for 3 / 12 taxing authorities in your county.</b> Once annual review is complete for all taxing authorities in your county, you will be able to accept this form series. The list below displays levy and CRA information for taxing authorities who have completed annual review at this time.	

Users may click the linked completion count (shown as 3/12 in the example above) to view the list of taxing authorities and the status of the annual review for each. Below is an example of the list that would display:

**Annual Review Status by Principal Taxing Authority**  
County Name: Flagler

csv Show 10 entries Filter:

County ID	County	Principal Taxing Authority ID	Principal Taxing Authority	Status
28	Flagler	219	Flagler County Board of County Commissioners	Annual Review - Assigned (Principal Taxing Authority)
28	Flagler	220	Flagler Schools	Annual Review - Assigned (Principal Taxing Authority)
28	Flagler	221	East Flagler Mosquito Control District	Annual Review - Assigned (Principal Taxing Authority)
28	Flagler	222	Flagler Estates Road and Water Control District	Annual Review - Assigned (Principal Taxing Authority)
28	Flagler	223	Town of Beverly Beach	Annual Review - Assigned (Principal Taxing Authority)
28	Flagler	224	City of Bunnell	Annual Review - Assigned (Principal Taxing Authority)
28	Flagler	225	City of Maitland	Annual Review - Assigned (Principal Taxing Authority)
28	Flagler	227	Dunes Community Development District	Annual Review - Assigned (Principal Taxing Authority)
28	Flagler	228	City of Palm Coast	Annual Review - Assigned (Principal Taxing Authority)
28	Flagler	746	Saint Johns River Water Management District	Annual Review - Complete

Showing 1 to 10 of 12 entries Previous 1 2 Next

The **Accept DR-420 Series** button displays after all taxing authorities within the county complete their annual review.

Below the annual review message, the **Property Appraiser Worklist** displays five sections which are labeled as:

- DR-420TIF Forms (Tax Increment Adjustment Worksheets)
- DR-420DEBT Forms (Certification of Voted Debt Millage)
- DR-420S Forms (Certification of School Taxable Value)
- DR-420 Forms (Certification of Taxable Value)
- Levies in *Do Not Levy* Status (No PA Forms)

**3.1** Carefully review the list of forms in each section. If any forms are missing from the **Property Appraiser Worklist**, please contact [TRIM@floridarevenue.com](mailto:TRIM@floridarevenue.com) prior to clicking **Accept DR-420 Series**.

**3.2** If the list is complete, click **Accept DR-420 Series**.

The **Property Appraiser Worklist** updates include:

- A button to facilitate batch upload of Form DR-420 series data appears at the top (see addendum D)
- Brief instructions presented above the worklist
- Two new columns at the right in each data table: **Form Status** and **Action**.

## DR-420 Series - Property Appraiser Worklist

Tax Year: 2025  
 County: 45 - Lake  
 Series Status: DR-420 Series - In Progress (Property Appraiser)

### DR-420 Series Completion

#### DR-420 Series Batch Upload

If you are using a batch upload file, click **Batch Upload**.  
 You may upload more than once.

**Batch Upload**

Any CRA or levy data in a new batch will overwrite data previously uploaded for that CRA or levy.  
 After successful upload, values will display on individual forms below.

#### Completing this Form Series

1. Complete forms on this worklist using the **Edit** button in the Action column.

Forms will be in one of the following statuses:

- **Incomplete** - the form has not been completely filled out, or did not pass validation
- **Recalculation Required** - one or more form values need to be recalculated based on a change to another form in the series.
- **Complete** - the form is complete and has passed validation.

2. **Certify the series.**

Certification instructions will appear at the bottom of the page when all forms are complete.

### DR-420TIF Forms (Tax Increment Adjustment Worksheets)

CSV Show 10 entries Filter:

PTA ID	Primary Principal Taxing Authority	CRA ID	CRA Name	Levy ID	Levy Name	Levy Type	Form Status	Action
338	338 - Lake County Board of County Commissioners	193	Mount Plymouth-Sorrento CRA	421	Lake County BCC - Operating	General	Incomplete	<a href="#">View/Edit</a>
338	338 - Lake County Board of County Commissioners	193	Mount Plymouth-Sorrento CRA	426	Lake County Water District	Dependent Special District	Incomplete	<a href="#">View/Edit</a>
338	338 - Lake County Board of County Commissioners	193	Mount Plymouth-Sorrento CRA	1119	Emergency Medical Services	Municipal Service Taxing Unit	Incomplete	<a href="#">View/Edit</a>
344	344 - City of Clermont	190	Downtown Clermont CRA	421	Lake County BCC - Operating	General	Incomplete	<a href="#">View/Edit</a>
344	344 - City of Clermont	191	Downtown Clermont CRA (Amended; 2015)	421	Lake County BCC - Operating	General	Incomplete	<a href="#">View/Edit</a>
344	344 - City of Clermont	190	Downtown Clermont CRA	426	Lake County Water District	Dependent Special District	Incomplete	<a href="#">View/Edit</a>
344	344 - City of Clermont	191	Downtown Clermont CRA (Amended; 2015)	426	Lake County Water District	Dependent Special District	Incomplete	<a href="#">View/Edit</a>
344	344 - City of Clermont	190	Downtown Clermont CRA	429	City of Clermont - Operating	General	Incomplete	<a href="#">View/Edit</a>
344	344 - City of Clermont	191	Downtown Clermont CRA (Amended; 2015)	429	City of Clermont - Operating	General	Incomplete	<a href="#">View/Edit</a>
344	344 - City of Clermont	190	Downtown Clermont CRA	1119	Emergency Medical Services	Municipal Service Taxing Unit	Incomplete	<a href="#">View/Edit</a>

Showing 1 to 10 of 91 entries Previous 1 2 3 4 5 ... 10 Next

### DR-420DEBT Forms (Certifications of Voted Debt Millage)

CSV Show 10 entries Filter:

PTA ID	Principal Taxing Authority	Levy ID	Levy Name	Levy Type	Voted	Debt	Form Status	Action
338	Lake County Board of County Commissioners	422	Lake County BCC - Voted, Debt	General	Yes	Yes	Incomplete	<a href="#">View/Edit</a>
355	City of Tavares	1883	City of Tavares - Voted, Debt	General	Yes	Yes	Incomplete	<a href="#">View/Edit</a>

Showing 1 to 2 of 2 entries Previous 1 Next



**3.3** In the **Form Status** column, one of three statuses will display.

Status Name	Detail	Description
Incomplete	Initial or Interim	Data has not been entered, only partial data has been entered, or data has been entered but validations failed.
Recalculation Required	Interim	Changes to another form impacted a calculated value on this form.
Complete	Final	All data has been entered, and all fields passed validation.

**3.4** In the **Action** column, a button labeled **View/Edit** is displayed for each form needing completion and certification by the property appraiser. The button label changes to **View** after certification is complete (see [section 6](#)).

**3.5** For users assigned the role **User Primary with Certification** (see user role table in [section 1](#)), a button labeled **Certify All** will appear at the bottom of the **Property Appraiser Worklist** once all forms show the status as **Complete** (see [section 6](#)).

**3.6** All data tables on the **Property Appraiser Worklist** can be sorted, filtered, and exported to a .CSV file.

Action	Instruction	Description
Sort data	Click the up/down arrow icon located to the right of the column header	<ul style="list-style-type: none"> <li>The data will sort in either ascending or descending order</li> <li>Sort will be either numeric or alphabetic based on the data in the column</li> <li>All data lines will display</li> </ul>
Filter data	Enter text in the filter field located to the right above the data table	<ul style="list-style-type: none"> <li>The data table will only display data lines that contain the filtered text</li> <li>Some data lines may be hidden</li> <li>Remove the text from the filter field to restore all lines in the data table</li> </ul>
Export data	Click the button labeled CSV located to the left above the data table	<ul style="list-style-type: none"> <li>A .CSV file with data from that data table downloads to the user's computer</li> <li>Open the file to view or edit the exported data</li> </ul>

**NOTE:** Any sorting or filtering of the data tables reverts to non-filtered, system-generated ordering when the **View/Edit** button is clicked. To maintain the sorting or filtering, right-click the **View/Edit** button and select "Open in a new tab." When changes are made to the form in a new tab, the data table will not update until the browser page is refreshed (which will also cause the data tables to revert to non-filtered, system-generated ordering).

**DR-420TIF Forms**  
(Tax Increment Adjustment Worksheets)

CSV Show 10 entries Filter:

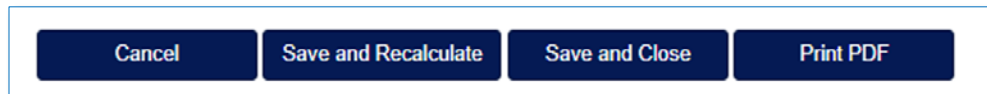
PTA ID	Primary Principal Taxing Authority	CRA ID	CRA Name	Levy ID	Levy Name	Levy Type	Form Status	Action
338	338 - Lake County Board of County Commissioners	193	Mount Plymouth-Sorrento CRA	421	Lake County BCC - Operating	General	Incomplete	<a href="#">View/Edit</a>
338	338 - Lake County Board of County Commissioners	193	Mount Plymouth-Sorrento CRA	426	Lake County Water District	Dependent Special District	Incomplete	<a href="#">View/Edit</a>
338	338 - Lake County Board of County Commissioners	193	Mount Plymouth-Sorrento CRA	1119	Emergency Medical Services	Municipal Service Taxing Unit	Incomplete	<a href="#">View/Edit</a>
344	344 - City of Clermont	190	Downtown Clermont CRA	421	Lake County BCC - Operating	General	Incomplete	<a href="#">View/Edit</a>
344	344 - City of Clermont	191	Downtown Clermont CRA (Amended, 2015)	421	Lake County BCC - Operating	General	Incomplete	<a href="#">View/Edit</a>
344	344 - City of Clermont	190	Downtown Clermont CRA	426	Lake County Water District	Dependent Special District	Incomplete	<a href="#">View/Edit</a>
344	344 - City of Clermont	191	Downtown Clermont CRA (Amended, 2015)	426	Lake County Water District	Dependent Special District	Incomplete	<a href="#">View/Edit</a>
344	344 - City of Clermont	190	Downtown Clermont CRA	429	City of Clermont - Operating	General	Incomplete	<a href="#">View/Edit</a>
344	344 - City of Clermont	191	Downtown Clermont CRA (Amended, 2015)	429	City of Clermont - Operating	General	Incomplete	<a href="#">View/Edit</a>
344	344 - City of Clermont	190	Downtown Clermont CRA	1119	Emergency Medical Services	Municipal Service Taxing Unit	Incomplete	<a href="#">View/Edit</a>

Showing 1 to 10 of 91 entries

Previous 1 2 3 4 5 ... 10 Next

## 4. Cancel/Save/Print Buttons

All form screens display four action buttons below the form input fields:



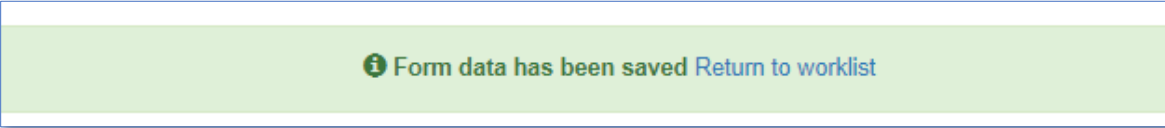
The functionality of each button is the same throughout the OASYS eTRIM application. Please note the description and caveat for each:


Button Label	Description	Caveat
<b>Cancel</b>	Returns the user to the <b>Property Appraiser Worklist</b> .	Any unsaved input will be lost.
<b>Save and Recalculate</b>	If the input is validated as complete by OASYS eTRIM, the system saves manually entered data and displays calculated values in appropriate fields without closing the form. <b>NOTE:</b> If the system is not able to validate the input as complete, additional data must be input and resaved (see 4.3).	Does not certify the form. <b>TIP:</b> Use this button to protect your work.
<b>Save and Close</b>	If the input is validated as complete by OASYS eTRIM, the system recalculates and saves data, closes the form, and returns the user to the <b>Property Appraiser Worklist</b> . <b>NOTE:</b> If the system is not able to validate the input as complete, additional data must be input and resaved (see 4.3).	Does not certify the form. <b>TIP:</b> Use this button to protect your work.
<b>Print PDF</b>	Downloads a printable PDF version of the form reflecting the saved input. The form remains open.	Does not save input.

**4.1** To save manually input data, input all required data and click either **Save and Recalculate** or **Save and Close**.

**4.2** When using the **Save and Close** button, if all required input fields are complete, the input is saved and the user is returned to the **Property Appraiser Worklist**. The **Form Status** updates to **Complete**.

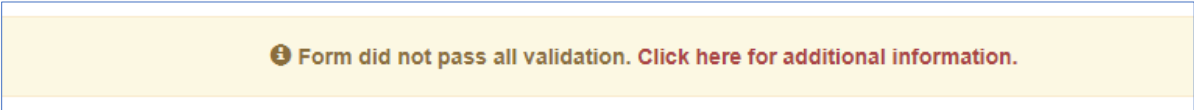
When using the **Save and Recalculate** button, if all required input fields are complete, a message indicating the data was saved will display above the form.




 Form data has been saved [Return to worklist](#)

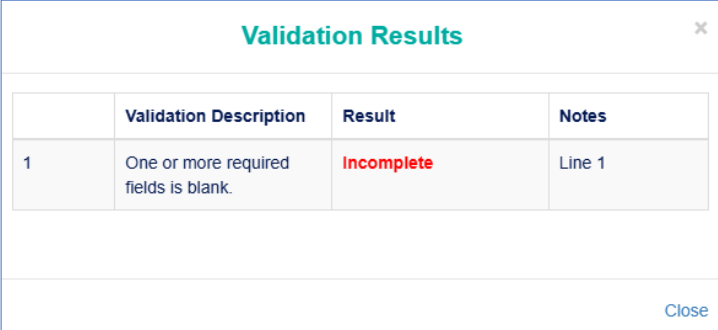
Click **Return to Worklist** to return to the **Property Appraiser Worklist**. The **Form Status** updates to **Complete**.

- 4.3** A message indicating the data did not pass all validation will display above the form if the user did not enter data in all required input fields.



 Form did not pass all validation. [Click here for additional information.](#)

To view the validation results, click the **Click here for additional information** link. The **Validation Results** dialog box opens with specific details of the validation issue(s). Below is an example of a **Validation Results** dialog box.



	Validation Description	Result	Notes
1	One or more required fields is blank.	Incomplete	Line 1

[Close](#)

After reviewing the validation results, click **Close** to close the dialog box. Add the needed information in the form and click either **Save and Recalculate** or **Save and Close**. The system will run the validation again to check if all the input fields are complete. If the form is closed without the validation results resolved, the **Form Status** remains **Incomplete**.

## 5. Manually Completing Section I of the Form DR-420 Series

**NOTE:** This section of the user guide describes the process for manually inputting data into each form on the **Property Appraiser Worklist**. Alternatively, property appraisers may batch upload all form data or use a hybrid approach and batch upload data for some forms and manually input data for other forms. Instructions for batch uploading are provided in addendum D.

- 5.1** The custom **Property Appraiser Worklist** includes all required DR-420 series forms for the current TRIM cycle. It is generated based on the annual review process completed by the taxing authorities (see [section 3](#)). Property appraisers must complete and certify **Section I** of each form by July 1 of the assessment year.

To access a form, click the **View/Edit** button in the last column of the **Property Appraiser Worklist**. The system will display the data fields for the particular form. Some data fields require user input while others are populated or calculated by OASYS eTRIM. The following tables provide details on data fields in **Section I** of each form in the DR-420 series. The tables below are presented in the order the forms appear on the **Property Appraiser Worklist**.

- 5.2** For **Section I** of **DR-420TIF**, enter data for lines 1, 2, and 4.

Line Number	Form Detail	System Details
1	Current year taxable value in the tax increment area	User entry
2	Base year taxable value in the tax increment area	User entry
3	Current year tax increment value	System-calculated <i>Subtracts Line 2 from Line 1</i>
4	Prior year final taxable value	User entry
5	Prior year tax increment value	System-calculated <i>Subtracts Line 2 from Line 4</i>

Click **Save and Recalculate** or **Save and Close** (see [section 4](#)).

- 5.3** For **Section I** of **DR-420DEBT**, enter data for lines 1, 2, and 3.

Line Number	Form Detail	System Details
1	Current year taxable value of real property for operating purposes	User entry
2	Current year taxable value of personal property for operating purposes	User entry
3	Current year taxable value of centrally assessed property for operating purposes	User entry
4	Current year gross taxable value for operating purposes	System-calculated <i>Sums Lines 1, 2 and 3</i>

Click **Save and Recalculate** or **Save and Close** (see [section 4](#)).

**5.4** For **Section I** of **DR-420S**, enter data for lines 1, 2, 3 5, and 7.

Line Number	Form Detail	System Details
1	Current year taxable value of real property for operating purposes	User entry
2	Current year taxable value of personal property for operating purposes	User entry
3	Current year taxable value of centrally assessed property for operating purposes	User entry
4	Current year gross taxable value for operating purposes	System-calculated <i>Sums Lines 1, 2 and 3</i>
5	Current year net new taxable value (Add new construction, additions, rehabilitative improvements increasing assessed value by at least 100%, annexations, and tangible personal property value over 115% of the previous year's value. Subtract deletions.)	User entry
6	Current year adjusted taxable value	System-calculated <i>Subtracts Line 5 from Line 4</i>
7	Prior year FINAL gross taxable value (From prior year applicable Form DR-403 series)	User entry
8	Number of Form DR-420DEBT worksheets	System-populated

Click **Save and Recalculate** or **Save and Close** (see [section 4](#)).

**5.5** For **Section I** of **DR-420**, enter data for lines 1, 2, 3, 5, and 7.

Line Number	Form Detail	System Details
1	Current year taxable value of real property for operating purposes	User entry
2	Current year taxable value of personal property for operating purposes	User entry
3	Current year taxable value of centrally assessed property for operating purposes	User entry
4	Current year gross taxable value for operating purposes	System-calculated <i>Sums Lines 1, 2 and 3</i>
5	Current year net new taxable value (Add new construction, additions, rehabilitative improvements increasing assessed value by at least 100%, annexations, and tangible personal property value over 115% of the previous year's value. Subtract deletions.)	User entry
6	Current year adjusted taxable value	System-calculated <i>Subtracts Line 5 from Line 4</i>

7	Prior year FINAL gross taxable value <i>(From prior year applicable Form DR-403 series)</i>	User entry
8	Number of Form DR-420TIF worksheets	System-populated
9	Number of Form DR-420DEBT worksheets	System-populated

Click **Save and Recalculate** or **Save and Close** (see [section 4](#)).

## 6. Certifying the DR-420 Series Forms to the Taxing Authorities

- 6.1 Depending on the status of the forms in the DR-420 series, one of two messages will display at the bottom of the **Property Appraiser Worklist**. If any form on the worklist shows the status as **Incomplete** or **Recalculation Required**, this message will display:

### DR-420 Series - Section I Certification

**DR-420 Series - Section I Not Ready to Certify**

One or more forms in this series requires further action.

**Review and complete the required forms.**

Once all forms are in **Complete** status, the series may be certified.

[Return to Dashboard](#)

If all forms on the **Property Appraiser Worklist** show the form status as **Complete** and the user's role is **User Primary with Certification**, this message and a button to certify the series will display:

### DR-420 Series - Section I Certification

**DR-420 Series - Section I Ready to Certify**

If the forms are correct, certify Section I of this series below.

After certification, taxing authorities in your county will be able to complete Section II of this series.

[Certify DR-420 Series - Section I](#)

[Return to Dashboard](#)

If the user does not have the role **User Primary with Certification**, this message will display:

### DR-420 Series - Section I Certification

**DR-420 Series - Section I Ready to Certify**

If the information provided on the forms is correct, a certifying user in your office may certify this series.

After certification, taxing authorities in your county will be able to complete Section II of this series.

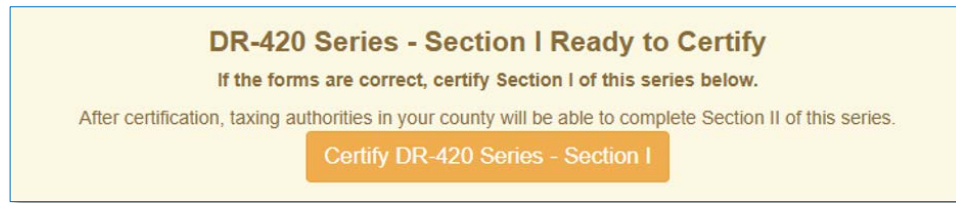
[Return to Dashboard](#)

**NOTE:** Only users with **User Primary with Certification** access to **OASYS eTRIM** can certify forms. If the **Certify DR-420 Series – Section I** button does not appear when all forms are in **Complete** status, contact the county's **OASYS Access Manager** for more information.

- 6.2 Before certifying, click the **View/Edit** button to review each form prior to certifying them. Forms can also be printed by clicking the **View/Edit** button, then clicking the **Print PDF** button. While viewing and printing are not required steps in OASYS eTRIM, it is a recommended best practice, especially if the valuation data was imported via batch upload. After ensuring that all form data is accurate, return to the **Property Appraiser Worklist**.



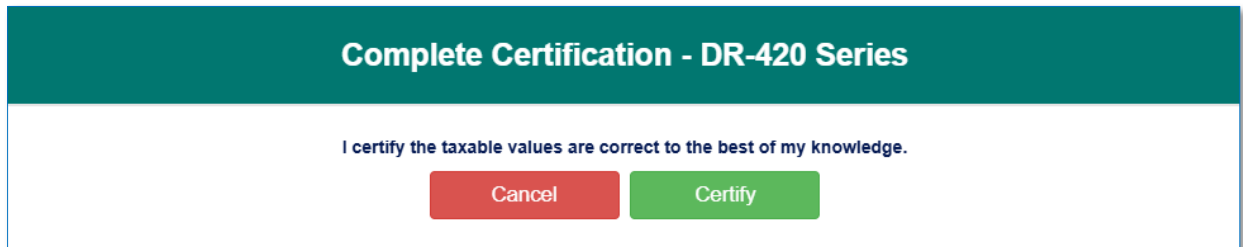
Click the **Certify DR-420 Series – Section I** button.



**DR-420 Series - Section I Ready to Certify**  
If the forms are correct, certify Section I of this series below.  
After certification, taxing authorities in your county will be able to complete Section II of this series.

[Certify DR-420 Series - Section I](#)

A dialog box with the certification statement appears.

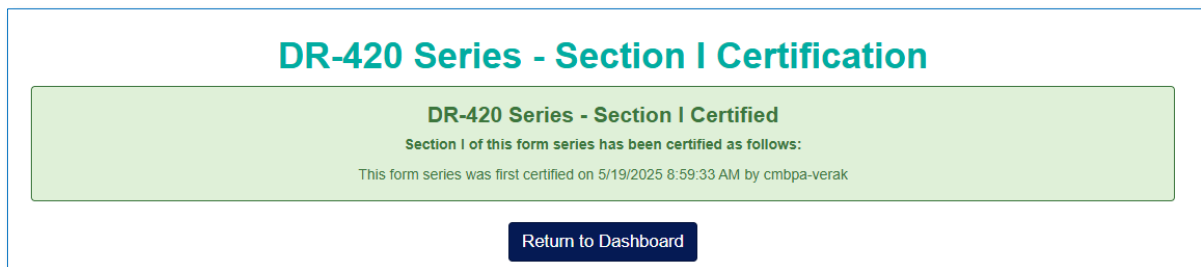


**Complete Certification - DR-420 Series**

I certify the taxable values are correct to the best of my knowledge.

[Cancel](#) [Certify](#)

Click the **Certify** button to certify the Form DR-420 series or click the **Cancel** button to return to the **Property Appraiser Worklist** without certifying the Form DR-420 series. When the **Certify** button is clicked, OASYS eTRIM applies the user's electronic signature certifying the forms and informs the respective taxing authorities the Form DR-420 series is available for **Section II** input and certification. This message displays at the bottom of the **Property Appraiser Worklist**:



**DR-420 Series - Section I Certification**

**DR-420 Series - Section I Certified**  
Section I of this form series has been certified as follows:  
This form series was first certified on 5/19/2025 8:59:33 AM by cmbpa-verak

[Return to Dashboard](#)

The **Property Appraiser Worklist** remains available for viewing certified forms.

**NOTE:** Once **Section I** of the Form DR-420 series has been certified to the taxing authorities, property appraisers may begin work on the Form DR-422 series which can be initiated from the user's OASYS eTRIM dashboard.

## 7. Reviewing and Accepting the Form DR-420 Series from the Taxing Authorities

When the taxing authorities have completed and certified **Section II** of each applicable DR-420 series form, property appraiser users will receive an email notification.

- 7.1** Log into the **OASYS ePortal**. Click **Truth in Millage** to launch the OASYS eTRIM application. A custom **OASYS eTRIM Dashboard** will display.

Click the button labeled **[Year] - DR-420 Series**.

The **Property Appraiser Worklist** displays. At the top of the worklist, a new section labeled **DR-420 Series Acceptance** lists all taxing authorities that have completed **Section II** of their respective forms. Two action buttons appear to the right of each taxing authority.

**DR-420 Series Acceptance**

**Accepting Certified or Amended Forms**

- Review forms certified or amended by the taxing authority.
  - Get PDF** button will download a copy of the forms as certified or most recently amended by taxing authority.
- Accept forms from the taxing authority, if they are correct.
  - If all information is correct, click **Accept** in the action column.
  - If any information is incorrect, **Contact TRIM**.

**Taxing Authority Series Certifications / Amendments**

One or more Principal Taxing Authorities has not completed certification or is pending amendment to certification.

CSV Show 10 entries Filter:

PTA ID	Principal Taxing Authority	PTA Certified Date	Series Status	Action
309	Indian River County Board of County Commissioners	5/21/2025	DR-420 Series - Pending Acceptance (Property Appraiser)	<a href="#">Get PDF</a> <a href="#">Accept</a>

Showing 1 to 1 of 1 entries Previous 1 Next

- 7.2** Click **Get PDF** to download and view the forms. All DR-420 series forms for the taxing authority download as a PDF. The file may save to your **Downloads** folder, or you may select a location in the file save dialog box.

**Taxing Authority Series Certifications / Amendments**

One or more Principal Taxing Authorities has not completed certification or is pending amendment to certification.

CSV Show 10 entries Filter:

PTA ID	Principal Taxing Authority	PTA Certified Date	Series Status	Action
309	Indian River County Board of County Commissioners	5/21/2025	DR-420 Series - Pending Acceptance (Property Appraiser)	<a href="#">Get PDF</a> <a href="#">Accept</a>

Showing 1 to 1 of 1 entries Previous 1 Next

**NOTE:** It is important to note that fields that do not apply to a particular taxing authority will display blank in the printed PDF.

- 7.3** Property appraisers may review the form data in both **Section I** and **Section II** on the PDF prior to accepting the taxing authority's forms. Open the downloaded PDF file and review the data.

**NOTE:** If any error or concerns arise, contact [TRIM@floridarevenue.com](mailto:TRIM@floridarevenue.com) to report errors or for assistance.

If the data appears correct, click **Accept** to accept the certified **Section II** data from that taxing authority. This confirms receipt of the forms.

**Taxing Authority Series Certifications / Amendments**

One or more Principal Taxing Authorities has not completed certification or is pending amendment to certification.

CSV Show 10 entries Filter:

PTA ID	Principal Taxing Authority	PTA Certified Date	Series Status	Action
309	Indian River County Board of County Commissioners	5/21/2025	DR-420 Series - Pending Acceptance (Property Appraiser)	Get PDF Accept

Showing 1 to 1 of 1 entries Previous 1 Next

The **DR-420 Series Acceptance** list updates; the **Accept** button is no longer available. The **Get PDF** button remains available for viewing and downloading the DR-420 series forms for that taxing authority.

**Taxing Authority Series Certifications / Amendments**

One or more Principal Taxing Authorities has not completed certification or is pending amendment to certification.

CSV Show 10 entries Filter:

PTA ID	Principal Taxing Authority	PTA Certified Date	Series Status	Action
309	Indian River County Board of County Commissioners	5/21/2025	DR-420 Series - Certified (Complete)	Get PDF

Showing 1 to 1 of 1 entries Previous 1 Next

## Addendum A - Terminology

### TRIM Entities

Dependent District	District that is governed by the governing body of the county or municipality.
Independent Special District	Special district that is not a dependent district of a county special district or municipality.
Municipal Service Taxing Unit (MSTU)	Counties may establish municipal service taxing or benefit units for any part or all of the unincorporated area of the county. These may provide fire protection; law enforcement; beach erosion control; recreation service and facilities; water; alternative water supplies, including, but not limited to, reclaimed water and water from aquifer storage and recovery and desalination systems; streets; sidewalks; street lighting; garbage and trash collection and disposal; waste and sewage collection and disposal; drainage; transportation; indigent health care services; mental health care services; and other essential facilities and municipal services from funds derived from service charges, special assessments, or taxes within such unit only.
Taxing Authority	Includes, but is not limited to, any county, municipality, authority, special district, or other public body of the state, any school district, library district, neighborhood improvement district created pursuant to the Safe Neighborhoods Act, metropolitan transportation authority, municipal service taxing or benefit unit (MSTU or MSBU), or water management district.
Value Adjustment Board (VAB)	The purpose of the value adjustment board (VAB) is to hear appeals regarding property value assessments, denied exemptions or classifications, ad valorem tax deferrals, portability decisions, and change of ownership or control. Taxpayers or their representatives file petitions with the VAB clerk in the county where the property is located.

### Millage Terminology

Adjusted millage	Adjustment of the final millage rate(s) calculated on Form DR-422, line 3.
Aggregate millage	Overall millage rate used to determine an overall rate for principal taxing authorities with dependent districts.
Dedicated increment value	The portion of the tax increment value used to determine the payment to the redevelopment trust fund (see s. 200.001(8)(h), F.S.).
Final millage	Millage adopted at the final budget hearing.
Maximum millage	The maximum millage rate allowed by vote.
Millage cap	The maximum millage rate allowed by law.
Other voted millage	Millage rate approved by referendum.
Proposed millage	The millage rate necessary to fund the proposed budget (on Form DR-420).
Rolled-back rate	The rate that would generate prior year tax revenues less allowances for new construction, additions, deletions, annexations, and improvements, increasing value by at least 100% and tangible personal property value in excess of 115% of the previous year's value.
Tax increment value	The cumulative increase in taxable value from the base year to the current year within the defined geographic area. It is used to determine the payment to a redevelopment trust fund under s. 163.387(1), F.S. or an ordinance, resolution, or agreement to fund a project or finance essential infrastructure (in this case, the taxing authority must certify the boundaries and beginning date to the property appraiser).
Tentative millage	The proposed millage rate adopted at the initial TRIM hearing (appears in the budget summary advertisement).
Truth in Millage (TRIM)	Establishes the statutory requirements that all taxing authorities levying a millage must follow, including all notices and budget hearing requirements.

## Addendum B - TRIM Forms

Form number	Form Title and short description
Form DR-420	<i>Certification of Taxable Value</i> Property appraisers certify values and taxing authorities provide proposed millage rates.
Form DR-420S	<i>Certification of School Taxable Value</i> Property appraisers certify values and school districts provide millage rates, or the millage rates considered by a taxing authority pursuant to Sections 200.065(2)(a)1. and (2)(b), F.S., to fulfill the tentative budget.
Form DR-420DEBT	<i>Certification of Voted Debt Millage</i>
Form DR-420MM	<i>Maximum Millage Levy Calculation, Final Disclosure</i>
Form DR-420MMP	<i>Maximum Millage Levy Calculation, Preliminary Disclosure</i>
Form DR-420TIF	<i>Tax Increment Adjustment Worksheet</i>
Form DR-422	<i>Certification of Final Taxable Value</i> Taxing authorities indicate final adopted millage rates.
Form DR-422DEBT	<i>Certification of Final Voted Debt Millage</i>
Form DR-421	<i>Certification for Taxing Authorities that Do Not Levy Ad Valorem Taxes</i>
Form DR-487	<i>Certification of Compliance</i> List of compliance requirements.
Form DR-487V	<i>Voting Record for Final Adoption of Millage Levy</i>

TRIM forms are available on the Department's [Property Tax Oversight forms website](#).

## Addendum C - Important TRIM Dates

July 1	Last day for the property appraiser to certify the DR-420 Series forms.
July 1 through 31	The board of county commissioners' (BOCC) budget officer delivers a tentative budget to the board.
August 4	Last day for taxing authorities to certify Form DR-420, Form DR-420MMP, and any additional forms to the property appraiser.
August 24	Last day the property appraiser can mail TRIM notices to property owners.
September 3 through 18	The time in which regular taxing authorities must hold their hearings on tentative budget and proposed millage rate. This is the final hearing period for school districts.
September 18 through October 3 <i>(Could be advertised as early as September 4, depending on the tentative hearing date.)</i>	<p>The taxing authority must advertise its intent to adopt a final millage rate and budget within this period.</p> <ul style="list-style-type: none"> <li>• The taxing authority must hold the public hearing to adopt the final millage rate and budget two to five days after the advertisement appears in the newspaper.</li> <li>• The taxing authority must send the resolution or ordinance adopting the final millage rate to the property appraiser, tax collector, and PTO within three days after the final hearing. The resolution should be submitted within 101 days of the July 1 certification of taxable value (by October 9).</li> <li>• Within three days after the taxing authority receives the Form DR-422 (and possibly Form DR-422DEBT), the taxing authority completes and certifies the final millage rates to the property appraiser.</li> </ul>

## Addendum D – Instructions for Batch Upload of Data

- D.1** To complete the **DR-420 Series** via batch upload, click the **Batch Upload** button on the Property Appraiser Worklist.



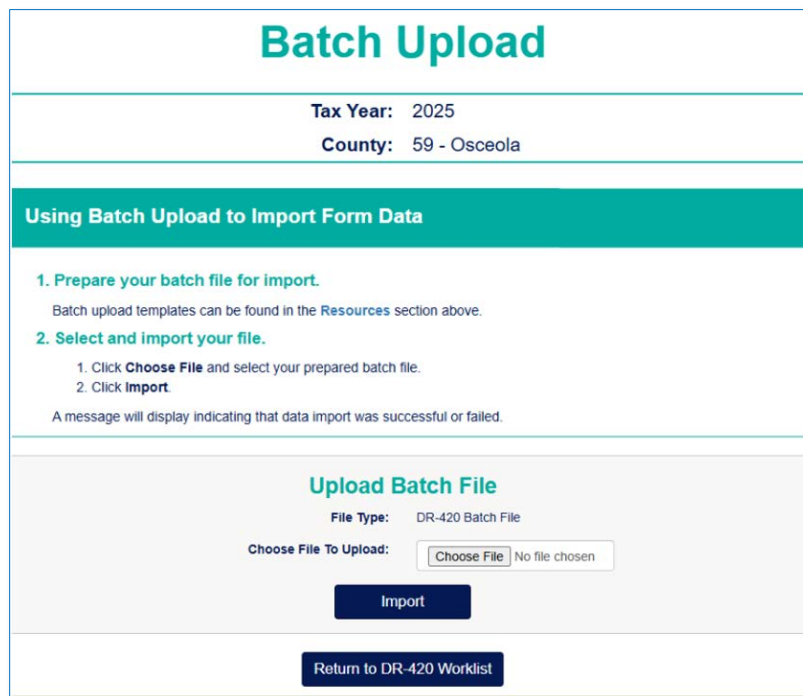
**DR-420 Series Batch Upload**

If you are using a batch upload file, click *Batch Upload*.  
You may upload more than once.

**Batch Upload**

Any CRA or levy data in a new batch will overwrite data previously uploaded for that CRA or levy.  
After successful upload, values will display on individual forms below.

- D.2** The **Batch Upload** screen displays:



**Batch Upload**

**Tax Year:** 2025  
**County:** 59 - Osceola

**Using Batch Upload to Import Form Data**

**1. Prepare your batch file for import.**  
Batch upload templates can be found in the [Resources](#) section above.

**2. Select and import your file.**

1. Click **Choose File** and select your prepared batch file.
2. Click **Import**.

A message will display indicating that data import was successful or failed.

**Upload Batch File**

**File Type:** DR-420 Batch File

**Choose File To Upload:**  No file chosen

**Import**

**Return to DR-420 Worklist**

Click **Choose File**.

Select the appropriate file from the file browser dialog box. See D.3 below for instructions on proper file layout.

The data file must be a comma delimited text file with .CSV or .TXT file name extension. See addendum E for instructions on converting an Excel file to .CSV or .TXT.

Click the **Import** button.

**D.3** Data for batch upload must be saved as a comma delimited text file with the file extension of .CSV or .TXT. The file must be formatted as follows:

- The file does not include field names or a header row.
- Each line contains one record.
- Only use numeric characters; no currency symbols or thousands/millions commas.
- Commas separate field values.
- Field 2 identifies the record (form) type; it is a single numeric digit (1, 2, 3, or 4).
  - 1 for Form DR-420
  - 2 for Form DR-420TIF
  - 3 for Form DR-420DEBT
  - 4 for Form DR-420S

There are no requirements for file names.

Data files may contain records for only one form type, or data files may contain records for multiple form types. Users may import multiple bulk upload data files.

**Form DR-420:** The required fields for each line of data for Form DR-420 include these fields, separated by a comma, which must appear in this sequence:

Field Number	Description	Form Line (if any)	Specifications
Field 1	County ID		Two digits
Field 2	Record Type		1
Field 3	Levy ID		Numeric
Field 4	Real Property Value	Form DR-420 - Line 1	Numeric
Field 5	Personal Property Value	Form DR-420 - Line 2	Numeric
Field 6	Centrally Assessed Value	Form DR-420 - Line 3	Numeric
Field 7	Net New Taxable Value	Form DR-420 - Line 5	Numeric
Field 8	Prior Year Final Gross Taxable Value	Form DR-420 - Line 7	Numeric

**Form DR-420TIF:** The required fields for each line of data for Form DR-420TIF include these fields, separated by a comma, which must appear in this sequence:

Field Number	Description	Form Line (if any)	Specifications
Field 1	County ID		Two digits
Field 2	Record Type		2
Field 3	Levy ID		Numeric
Field 4	CRA ID		Numeric
Field 5	Current Year Taxable Value	Form DR-420TIF - Line 1	Numeric
Field 6	Base Year Taxable Value	Form DR-420TIF - Line 2	Numeric
Field 7	Prior Year Final Taxable Value	Form DR-420TIF - Line 5	Numeric



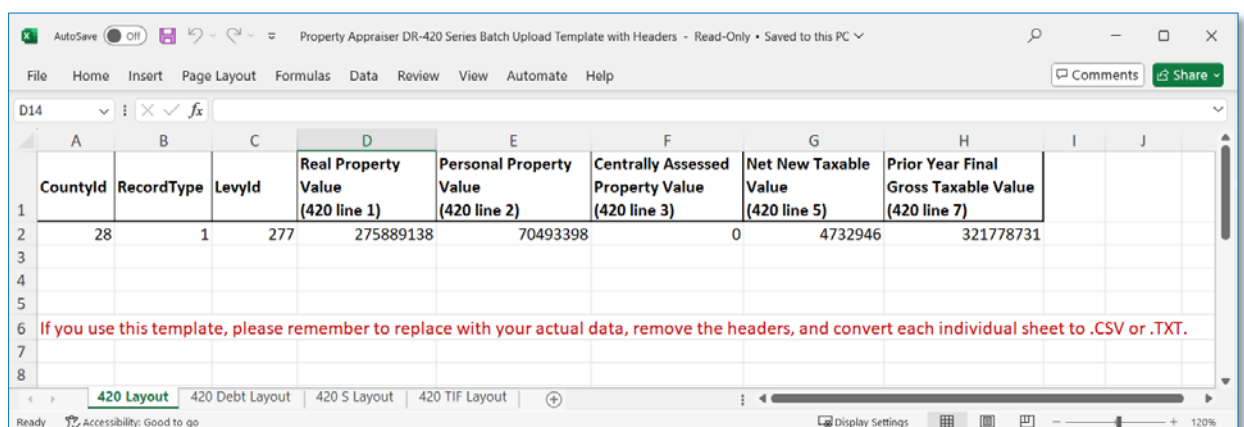
**Form DR-420DEBT:** The required fields for each line of data for Form DR-420DEBT include these fields, separated by a comma, which must appear in this sequence:

Field Number	Description	Form Line (if any)	Specifications
Field 1	County ID		Two digits
Field 2	Record Type		3
Field 3	Levy ID		Numeric
Field 4	Real Property Value	Form DR-420DEBT - Line 1	Numeric
Field 5	Personal Property Value	Form DR-420DEBT - Line 2	Numeric
Field 6	Centrally Assessed Value	Form DR-420DEBT - Line 3	Numeric

**Form DR-420S:** The required fields for each line of data for Form DR-420S include these fields, separated by a comma, which must appear in this sequence:

Field Number	Description	Form Line (if any)	Specifications
Field 1	County ID		Two digits
Field 2	Record Type		4
Field 3	Levy ID		Numeric
Field 4	Real Property Value	Form DR-420S - Line 1	Numeric
Field 5	Personal Property Value	Form DR-420S - Line 2	Numeric
Field 6	Centrally Assessed Value	Form DR-420S - Line 3	Numeric
Field 7	Net New Taxable Value	Form DR-420S - Line 5	Numeric
Field 8	Prior Year Final Gross Taxable Value	Form DR-420S - Line 7	Numeric

A Microsoft Excel file containing four templates is available under the **Resources** tab within OASYS eTRIM. The file has four tabs, one for each form type, and basic instructions.



Batch load data prepared in Microsoft Excel must be saved as a comma delimited file in order to properly import into OASYS eTRIM. See addendum E for instructions on converting a Microsoft Excel file to .CSV or .TXT.

**D.4** To avoid or quickly resolve validation errors, check the comma delimited data file for these common errors:

- 1) Verify your County ID is correct.
- 2) Verify the Levy IDs are correct.
- 3) Delete extraneous blank spaces before or after a value in your file.

*For example, this file has additional blank spaces around some values.*

```
32,      3, 568      , 78957895, 565656, 8500
```

*To correct this file, remove the additional spaces as shown in the example below.*

```
32, 3, 568, 78957895, 565656, 8500
```

- 4) Remove any commas after the last value in each line.

*For example, this file has extra commas after the last value in the line.*

```
32, 3, 568, 78957895, 565656, 8500,,,,,
```

*To correct this file, delete all extra commas after the last value in the line.*

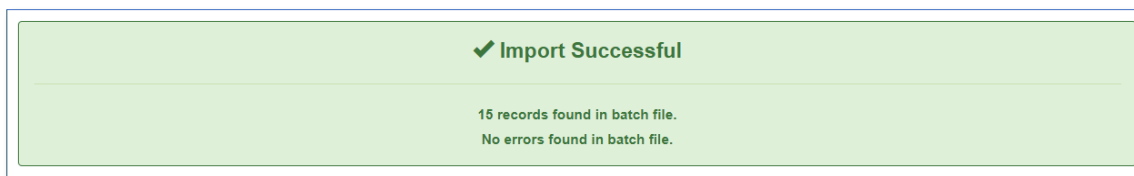
```
32, 3, 568, 78957895, 565656, 8500
```

- 5) Write numeric values over 999 without commas since the system interprets commas as field delimiters.

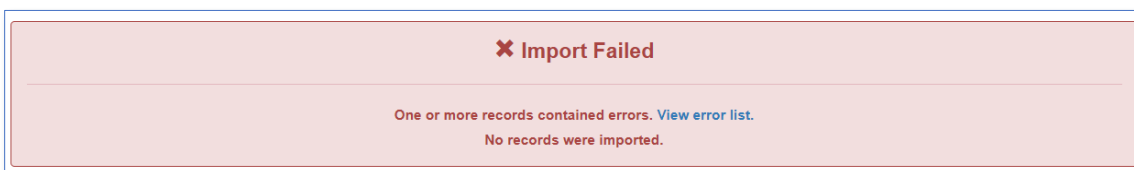
*For example, write "2356" instead of "2,356."*

- 6) Do not insert text in a numeric field.

**D.5** OASYS eTRIM validates uploaded batch data files. If the file uploads successfully, a confirmation message will display on the batch upload screen.



If the validation fails, no data will transfer from the batch file and a message with a link to view an error list will display. Click the linked text labeled **View error list**.



A **Validation Results** dialog box appears. All errors are listed by line number. Errors can be sorted or filtered. Take note of the errors or export the list to a CSV file.

Close the dialog box.

Make the necessary corrections to the data file and upload it to OASYS eTRIM again.

Line number	Error
61	Levy ID invalid (not related to the PA county).

When all batch upload files have been imported successfully, click the **Return to DR-420 Worklist** button at the bottom of the screen to return to the **Property Appraiser Worklist**.

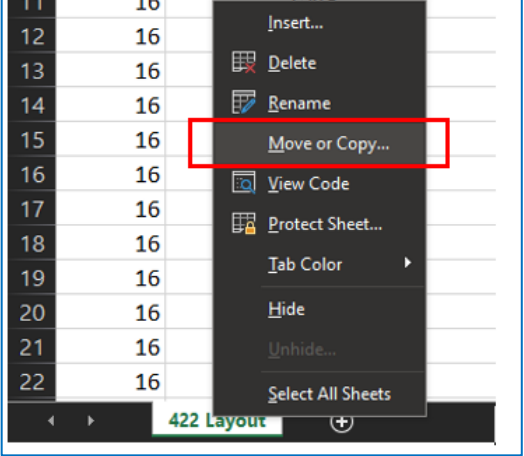
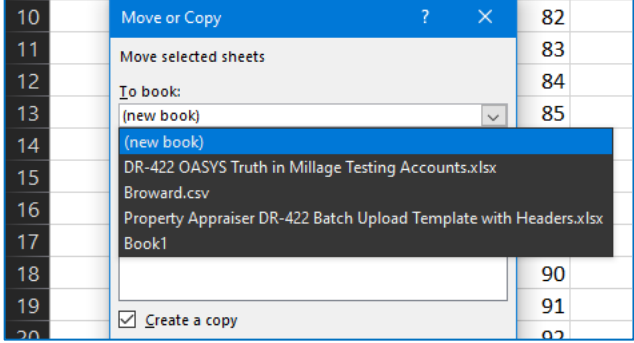
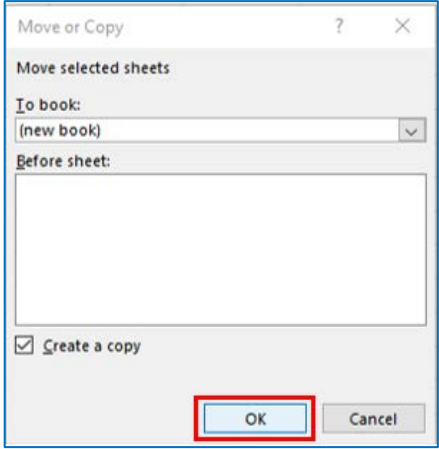
**NOTE:** Closely review the **Property Appraiser Worklist** to check that all form statuses show as **Complete**. Any forms not completed using the batch upload process should be completed manually (see [section 5](#)). Click the **View/Edit** button to review each form prior to certifying them (see [section 6](#)). Forms can also be printed by clicking the **View/Edit** button, then clicking the **Print PDF** button. While viewing and printing are not required steps in OASYS eTRIM, it is recommended by the Department as a best practice, especially if the valuation data was imported via batch upload.

- D.6** Contact [pto-oasys@floridarevenue.com](mailto:pto-oasys@floridarevenue.com) for assistance if you experience persistent issues with the batch upload process.

## Addendum E - Converting Excel Template to .CSV or .TXT

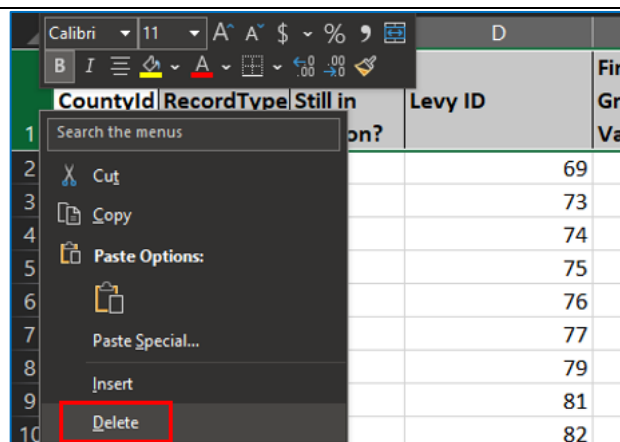
Batch upload data prepared in the Microsoft Excel template must be converted to either .CSV or .TXT before being imported into OASYS eTRIM. Follow these steps to successfully convert and prepare the file.

**Step 1:** After inserting the form data into the template, copy the spreadsheet to a new workbook:

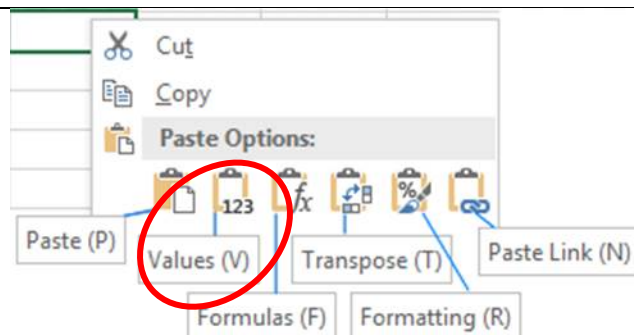
<ul style="list-style-type: none"> <li>Right click on the tab name at the bottom of the file.</li> <li>Select <b>Move or Copy</b>.</li> </ul>	
<ul style="list-style-type: none"> <li>Check the <b>Create a copy</b> box.</li> <li>Select <b>(new book)</b> from the <b>To book:</b> dropdown menu.</li> </ul>	
<ul style="list-style-type: none"> <li>Click <b>OK</b></li> </ul> <p>The data appears in a new Excel workbook.</p>	

**Step 2:** Prepare the data for import into OASYS eTRIM:

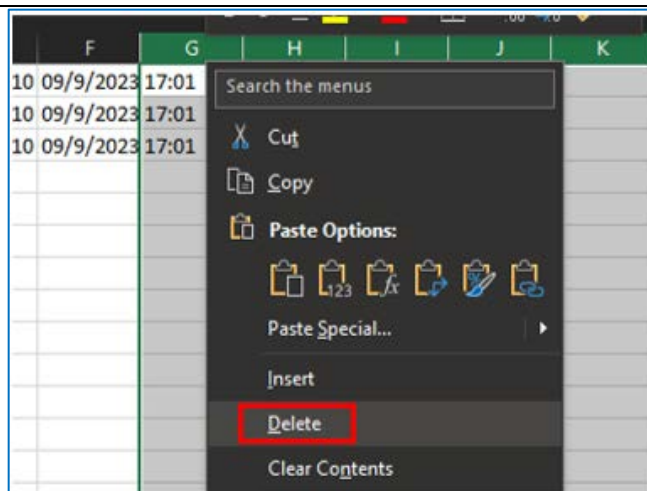
- Remove the headers by right clicking Row 1 and selecting **Delete**.



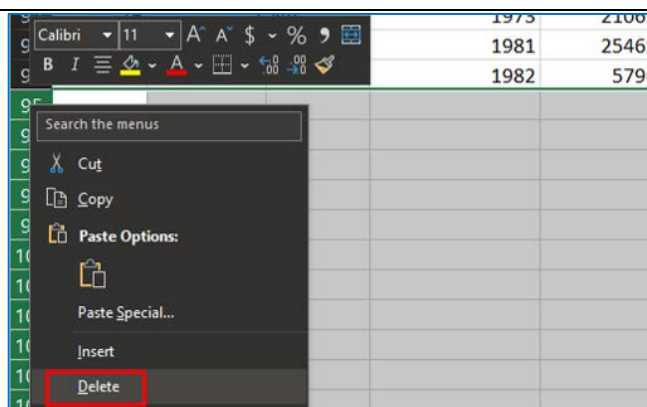
- Ensure all data is recognized as numeric values by selecting all data in your file (Ctrl+A) and copy it (Ctrl+C).
- Click on the cell in Row 1, Column A.
- Paste the data as values into the original fields (Ctrl+V).



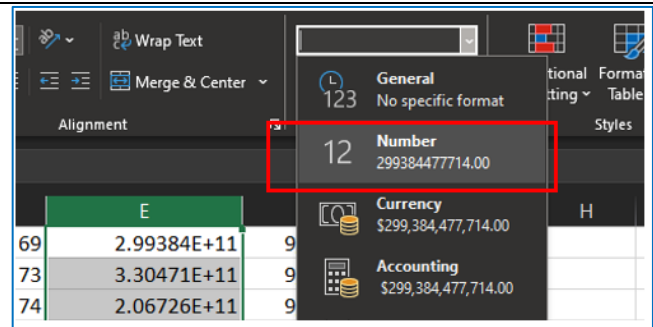
- Highlight ten columns to the right of your data and delete them.



- Select ten rows below your data and delete them.

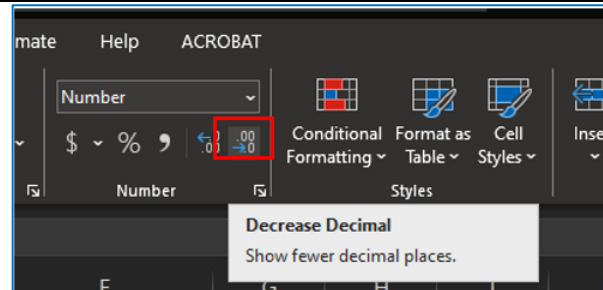


- Highlight columns that contain dollar values and format them to numbers. The columns need attention:
  - DR-420 file: columns D, E, F, G, H
  - DR-420DEBT file: columns D, E, F
  - DR-420S file: columns D, E, F, G, H
  - DR-420TIF file: columns E, F, G
  - DR-422 and DR-422DEBT file: column E



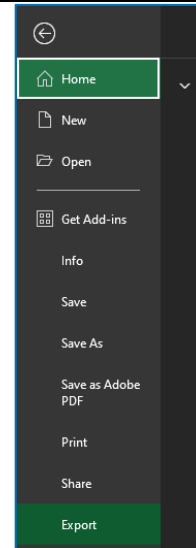
*This is an example from the DR-422 series file format.*

- The prior action causes the values to have two decimal places. Remove the decimal places by clicking the **Decrease Decimal** button twice.

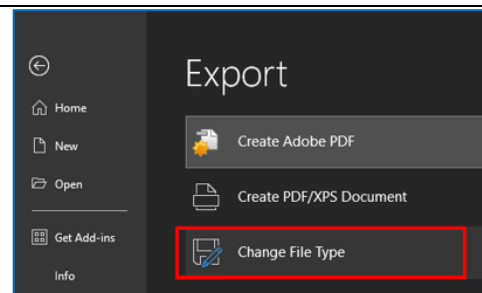


### Step 3: Export the data to .CSV or .TXT:

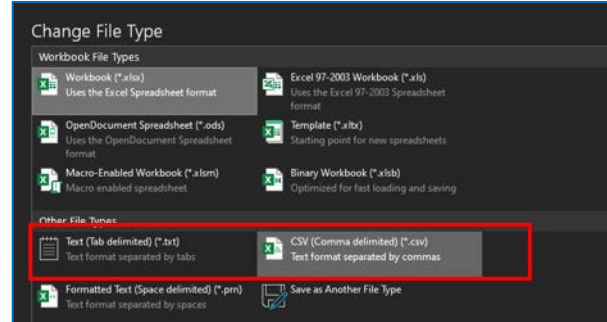
- Click **File** in the top left corner of the spreadsheet.
- Click **Export**.



- Click **Change File Type**.



- Select either **CSV** or **Text**.



- Click **Save As**.
- Name and save the file.

The file may now be uploaded to OASYS eTRIM.

