# OASYS Electronic Truth in Millage

Form DR-422 Series User Guide For Property Appraisers



Florida Department of Revenue
Property Tax Oversight
September 2025

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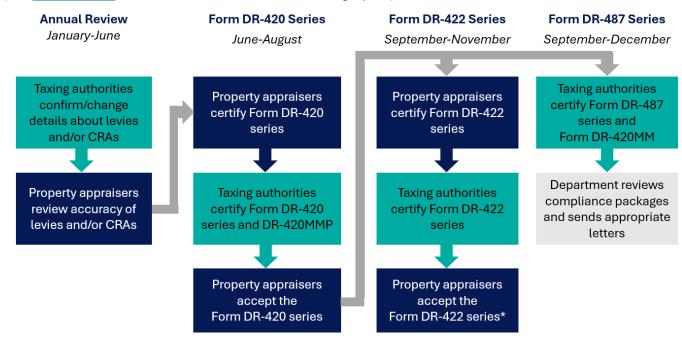
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#### 1. Introduction

**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 (on demand module)
- Detailed TRIM information (TRIM webpage)

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



<sup>\*</sup> 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 <u>OASYS ePortal</u>. To learn about general OASYS functionality, please review the <u>OASYS ePortal Inside PTO module</u>.

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

The second step for property appraisers in the annual TRIM cycle is to certify the final taxable value to the taxing authorities in the county (see property appraiser's September-November responsibilities in the TRIM cycle graphic above). Forms that comprise the DR-422 series are the mechanism for final value certification. Property appraisers must input and certify final valuation data for **Section I** of the Form DR-422 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 final valuation data for any basin the district levies within the county. OASYS eTRIM generates a custom worklist for the property appraiser.

**About This User Guide:** This user guide contains instructions for property appraisers to complete and certify the TRIM forms which comprise the Form DR-422 series:

Form number	Form Title
Form DR-422	Certification of Final Taxable Value
Form DR-422DEBT	Certification of Final Voted Debt Millage

<u>Section 5</u> of this user guide details the manual process for inputting data for the Form DR-422 series. Data input for the Form DR-422 series can also be accomplished through batch upload of data. The procedure for batch uploads is described in <u>addendum D</u>. <u>Section 6</u> 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:

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

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 **Property Appraiser Dashboard** will display.

2.3 From the Property Appraiser Dashboard, click the DR-422 Series (yyyy) button.

The **DR-422 Series - Property Appraiser Worklist** displays (see example on the following page).



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# **DR-422 Series - Property Appraiser Worklist**

Tax Year: 2025 County: 59 - Osceola

Series Status: DR-422 Series - Assigned (Property Appraiser)

General

Previous 1 2 3 4

Yes

#### **DR-422 Series Forms Ready**

Review the list of forms presented below and click "Accept DR-422 Series" if all levy and CRA information is correct

Contact TRIM if information is incorrect. Accept DR-422 Series

**DR-422 Series Completion** 

#### **DR-422DEBT Forms** (Certifications of Voted Debt Millage) PTA ID **Principal Taxing Authority** Levy ID 1 Levy Name Levy Type 11 Voted Debt Osceola County Board of County Commissioners 631 Save Osceola - Voted, Debt General Yes Central Florida Tourism Oversight District Central Florida Tourism Oversight District - Voted, Debt

Showing 1 to 2 of 2 entries Previous 1 Next

935

#### **DR-422 Forms** (Certifications of Taxable Value) CSV Show 10 ✓ entries PTA ID Principal Taxing Authority Levy ID 11 Levy Name Levy Type Voted 11 Debt Osceola County Board of County Commissioners Osceola County BCC - Operating Osceola County Board of County Commissioners Anorada Municipal Service Taxing Unit Osceola County Board of County Commissioners Municipal Service Taxing Unit 515 Osceola County Board of County Commissioners 1264 Blackstone Landing (Phase 1) Municipal Service Taxing Unit No Osceola County Board of County Commissioners Emerald Lakes Municipal Service Taxing Unit Osceola County Board of County Commissioners 1278 Emergency Management Services (Fire/Rescue) Municipal Service Taxing Unit 515 Osceola County Board of County Commissioners Hammock Point Municipal Service Taxing Unit Osceola County Board of County Commissioners Hidden Heights Trail Municipal Service Taxing Unit 515 Osceola County Board of County Commissioners 1291 Indian Ridge Municipal Service Taxing Unit No Osceola County Board of County Commissioners Indian Ridge Villas Municipal Service Taxing Unit Showing 1 to 10 of 41 entries

#### DR-422 Series - Section I Certification

#### DR-422 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

#### 3. The Property Appraiser Worklist

3.1 Initially, the only active button on the **Property Appraiser Worklist** is a button labeled **Accept DR-422 Series** (see worklist example on the previous page).

Carefully review the list of forms in each section. If any forms are missing from the **Property Appraiser Worklist** or if any information appears incorrect, please contact

TRIM@floridarevenue.com.



If there are no concerns with the information displayed, click **Accept DR-422 Series**.

The **Property Appraiser Worklist** updates (see example at the end of this section). The updates include:

- A button to facilitate batch upload of Form DR-422 series data at the top (see <u>addendum D</u>)
- Brief instructions
- Two new columns which are labeled:
  - Form Status
  - Action
- 3.2 In the Form Status column, for active DR-422 series forms, one of three statuses displays. If a taxing authority certified 0.0000 proposed millage rate for a levy (or levies) during DR-420 Series Certification, a Form DR-422 or DR-422DEBT will not generate for that levy (or levies). The Property Appraiser Worklist displays "N/A" as the Form Status for that levy (or levies) and no "View/Edit" button displays in the Action column.

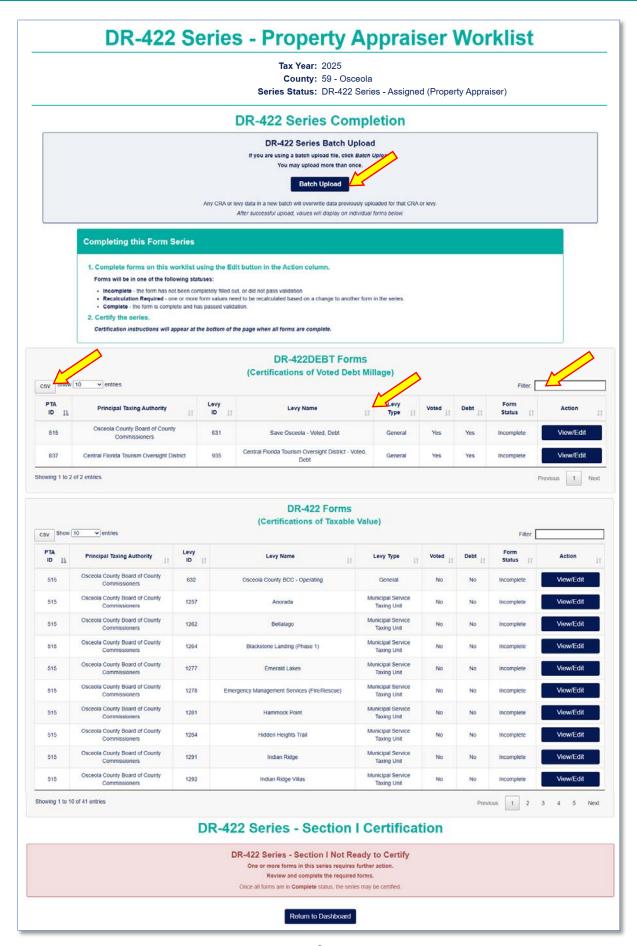
Status Name	Detail	Description
Incomplete	Initial or	No data entered, only partial data entered, or data was
	Interim	entered but validations failed.
Recalculation	Interim	Changes to another form impacted a calculated value on
Required		this form.
Complete	Final	All data was entered, and all fields passed validation.

- 3.3 In the Action column, a View/Edit button displays for each active form needing completion and certification by the property appraiser. NOTE: The button is labeled View after certification of Section I data is complete (see <a href="section 6">section 6</a>).
- **3.4** For users assigned the role **User Primary with Certification** (see user role table in <u>section 1</u>), the **Certify DR-422 Series** button appears at the bottom of the **Property Appraiser Worklist** once all active forms show the status as **Complete** (see <u>section 6</u>).

**3.5** 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> <li>The data sorts in either ascending or descending order.</li> <li>Sort is either numeric or alphabetic based on the data in the column.</li> <li>All data lines display.</li> </ul>
Filter data	Enter text in the filter field located to the right above the data table.	<ul> <li>The data table only displays 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 <b>CSV</b> located to the left above the data table.	<ul> <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 user clicks the **View/Edit** button. 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 does not update until the browser page is refreshed. This also causes the data tables to revert to non-filtered, system-generated ordering.



### 4. Cancel/Save/Print Buttons

All form screens display four action buttons below the form input fields: **Cancel**, **Save and Recalculate**, **Save and Close**, and **Print PDF**.

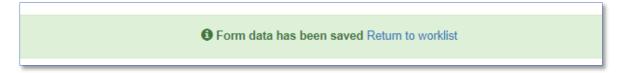


The functionality of each button is the same throughout the OASYS eTRIM application. Please note the description and caveat for each:

Button Label	Description	Caveat
Cancel	Returns the user to the <b>Property Appraiser Worklist</b> .	Any unsaved input will be lost.
Save and Recalculate	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.  NOTE: 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.
Save and Close	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</b> Worklist.  NOTE: 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.
Print PDF	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 system returns the user 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 displays above the form.

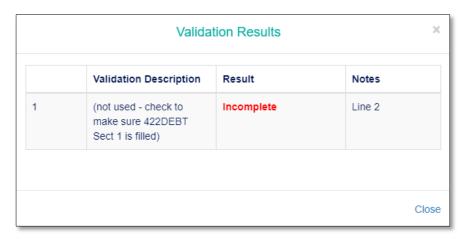


Click **Return to Worklist** to return to the **Property Appraiser Worklist**. The **Form Status** updates to **Complete**.

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



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



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 runs 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-422 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 <u>Addendum D</u>.

**5.1** The custom **Property Appraiser Worklist** includes all required DR-422 series forms for the current TRIM cycle.

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 that 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-422 series. The tables below are presented in the order the forms appear on the **Property Appraiser Worklist**.

NOTE: If a taxing authority certified 0.0000 proposed millage rate for a levy (or levies) during DR-420 Series certification, Form DR-422 or Form DR-422DEBT will not generate for that levy (or levies). The **Property Appraiser Worklist** displays "N/A" as the **Form Status** for that levy (or levies) and no **View/Edit** button displays in the **Action** column. For example:



**5.2** For Section I of Form DR-422, enter data for the first question, line 2, and the taxing authority deadline.

Line		
Number	Form Detail	System Details
nono	Is VAB still in session?	Binary user entry
none	IS VAB Still III Session!	Select Yes or No *
		System-populated
1	Current year gross taxable value	From Line 10 of current year
		Form DR-420
2	Final current year gross taxable value	User entry **
		System-calculated
3	Percentage of change in taxable value	Divides Line 2 by Line 1, then
		subtracts 1 from the
		product, multiples by 100

none	The principal taxing authority must complete this form and return it to the property appraiser by (enter time in military format – example 17:01 means 5:01 p.m.)	User entry Data format is mm/dd/yyyy hh:mm (must be p.m.) ***
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- \* This entry is populated by the system on all forms. If the property appraiser selects "Yes," that entry appears on all forms. If the property appraiser subsequently selects "No," the entry changes on all forms.
- \*\* If the VAB is no longer in session, this entry is populated by the system on Line 7 (Prior Year Final Gross Taxable Value) of next year's Form DR-420 or Form DR-420S.
- \*\*\* This entry is populated by the system on all forms. If the property appraiser changes the date or time on one form, that entry appears on all forms.

Click Save and Recalculate or Save and Close (see section 4).

**5.3** For Section I of Form DR-422DEBT, enter data for the first question, line 2, and the taxing authority deadline.

Line		
Number	Form Detail	System Details
none	Is VAB still in session?	Binary user entry
		Select Yes or No *
		System-populated
1	Current year gross taxable value	From Line 4 of current year
		Form DR-420DEBT
2	Final current year gross taxable value	User entry
3	Percentage of change in taxable value	System-calculated Divides Line 2 by Line 1, then subtracts 1 from the product, multiples by 100
none	The principal taxing authority must complete this form and return it to the property appraiser by (enter time in military format – example 17:01 means 5:01 p.m.)	User entry Data format is mm/dd/yyyy hh:mm (must be p.m.) **

- \* This entry is populated by the system on all forms. If the property appraiser selects "Yes," that entry appears on all forms. If the property appraiser subsequently selects "No," the entry changes on all forms.
- \*\* This entry is populated by the system on all forms. If the property appraiser changes the date or time on one form, that entry appears on all forms.

Click Save and Recalculate or Save and Close (see section 4).

#### 6. Certifying the DR-422 Series Forms to the Taxing Authorities

6.1 Depending on the status of the forms in the DR-422 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:



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:



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



**NOTE:** Only users with **User Primary with Certification** access to **OASYS eTRIM** can certify forms. If the **Certify DR-422 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-422 Series – Section I** button.

A dialog box with the certification statement appears.



Click the **Certify** button to certify the DR-422 series or click the **Cancel** button to return to the **Property Appraiser Worklist** without certifying the Form DR-422 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-422 series is available for Section II input and certification. This message displays at the bottom of the **Property Appraiser Worklist**:



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

**NOTE**: If the DR-422 series forms are certified indicating that the VAB is still in session, the property appraiser must complete Post-VAB DR-422 Series forms. See <a href="mailto:section8">section 8</a> for instructions.

# 7. Reviewing and Accepting the Form DR-422 Series from the Taxing Authorities

When the taxing authorities have completed and certified **Section II** of each applicable DR-422 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 **Property Appraiser Dashboard** will display.

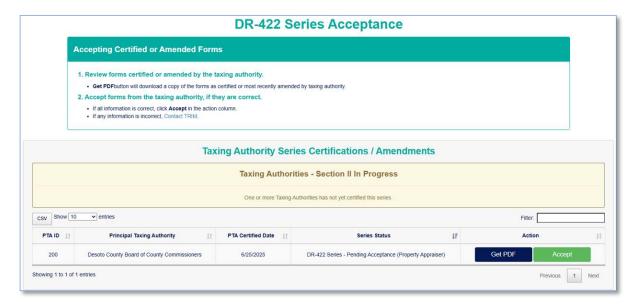


**NOTE:** The status message for the **DR-422 Series (yyyy)** varies depending on the status:

- Assigned (Principal Taxing Authority) Section I certified, assigned to taxing authorities
- Pending Acceptance (Property Appraiser) Section II certified for all taxing authorities
- Certified (Complete) property appraiser has accepted all certified forms, series complete

It is not necessary to wait until the status shows "Pending Acceptance (Property Appraiser)" indicating all taxing authorities have completed Section II certification; the property appraiser can view and accept certified DR-422 series forms once any taxing authority has certified **Section II**.

Click the button labeled **DR-422 Series (yyyy)**. The **Property Appraiser Worklist** displays. At the top of the worklist, a new section labeled **DR-422 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.



**7.2** Click **Get PDF** to download and view the forms. All DR-422 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.



**NOTE:** It is important to note that fields which 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: You may contact TRIM@floridarevenue.com to report errors or request 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.



The **DR-422 Series Acceptance** list updates; the **Accept** button is no longer available. The **Get PDF** button remains available for viewing and downloading the DR-422 series forms for that taxing authority.



Once all forms on the **DR-422 Series Acceptance** list are accepted, the process is complete and the list updates to show it is no longer in progress.



The status message on the **Property Appraiser Dashboard** for the **DR-422 Series (yyyy)** also updates to indicate the process is complete.

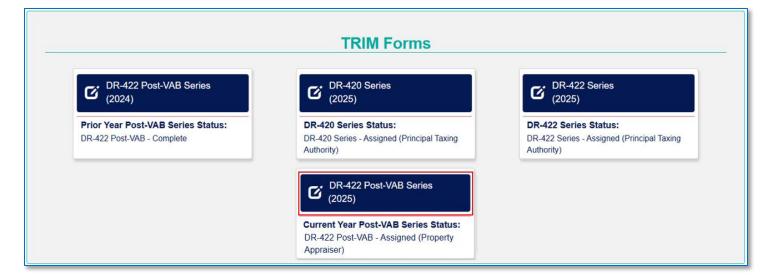


#### 8. DR-422 Post-VAB Series Completion and Certification

If the VAB was still in session when **Section I** data for the DR-422 Series was certified to the taxing authorities (see <u>section 6</u>), the property appraiser must complete and certify **DR-422 Post-VAB Series** forms to the taxing authorities after the VAB session is concluded. This can be done before or after accepting Section II data from the taxing authority (see <u>section 7</u>). Section I data can be added to OASYS eTRIM using the batch upload method (see <u>addendum D</u>) or manually (see 8.3).

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

Click the DR-422 Post-VAB Series (yyyy) button.

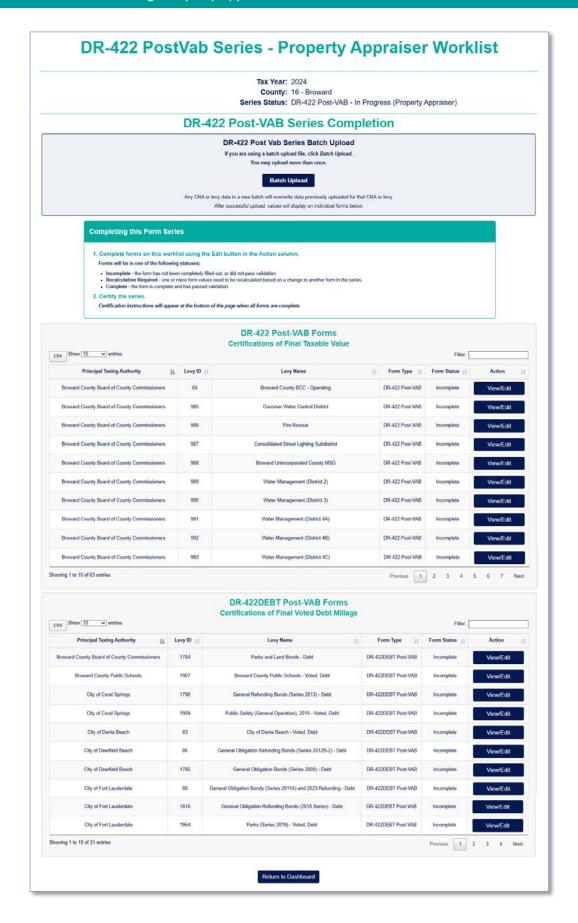


The **Property Appraiser Worklist** displays.

8.2 Click Accept DR-422 Post-VAB Series to begin work on the forms.



The Property Appraiser Worklist updates (see example on following page).



8.3 To manually input data, click any **View/Edit** button in the **Action** column and follow the general procedure described in <u>section 5</u>. Enter data for line 2. To batch upload data, click **Batch Upload** and follow the general procedure described in <u>Addendum D</u>.

**NOTE:** OASYS eTRIM automatically populates **No** for **Is VAB still in session?**. This does not display on the input screen but does appear in the PDF version when viewed or printed.

Line		
Number	Form Detail	System Details
	Current year gross taxable value	System-populated
1		From Line 10 of current year
1		Form DR-420 (or
		Form DR-420DEBT)
2	Final current year gross taxable value	User Entry *
		System-calculated
3	Percentage of change in taxable value	Divides Line 2 by Line 1, then
		subtracts 1 from the
		product, multiples by 100

<sup>\*</sup> For non-debt levies, if the VAB is no longer in session, this entry is system-populated to next year's DR-420 or DR-420S Line 7 (Prior Year Final Gross Taxable Value).

Click Save and Recalculate or Save and Close (see section 4).

NOTE: If the property appraiser certifies the <u>prior year's</u> DR-422 Post-VAB Series after certifying the <u>current year's</u> DR-420 Series, the certified values do not update on the <u>current year's</u> DR-420 Series.

8.4 The final step is certifying Section I data on the DR-422 Post-VAB Series forms. To certify DR-422 Post-VAB Series forms, follow the general procedure described in <u>section 6</u>. Depending on the status of the forms in the DR-422 Post-VAB 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:



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:



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



**NOTE:** Only users with **User Primary with Certification** access to **OASYS eTRIM** can certify forms. If the **Certify DR-422 (Post VAB) Series** button does not appear when all forms are in **Complete** status, contact the county's OASYS Access Manager for more information.

8.5 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-422 (Post VAB) Series button.



A dialog box with the certification statement appears.



Click the **Certify** button to certify the Form DR-422 Post-VAB Series or click the **Cancel** button to return to the **Property Appraiser Worklist** without certifying the 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-422 Post-VAB Series is available.

This message displays at the bottom of the **Property Appraiser Worklist**:



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

**NOTE:** Unlike the initial certification of the DR-422 Series, taxing authorities do not input data in Section II or recertify the DR-422 Post-VAB Series forms. OASYS eTRIM notifies relevant the taxing authorities of the property appraiser's post-VAB certification of the DR-422 Post-VAB Series.

# Addendum A - Terminology

### **TRIM Entities**

Dependent District	District that is governed by the governing body of the county or municipality.
Independent Special	Special district that is not a dependent district of a county special district or municipality.
District	
Municipal Service	Counties may establish municipal service taxing or benefit units for any part or all of the
Taxing Unit (MSTU)	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	The purpose of the value adjustment board (VAB) is to hear appeals regarding property value
Board (VAB)	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**

	o,
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	The portion of the tax increment value used to determine the payment to the redevelopment
value	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	Certification of Taxable Value		
	Property appraisers certify values and taxing authorities provide proposed		
	millage rates.		
Form DR-420S	Certification of School Taxable Value		
	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	Certification of Voted Debt Millage		
Form DR-420MM	Maximum Millage Levy Calculation, Final Disclosure		
Form DR-420MMP	Maximum Millage Levy Calculation, Preliminary Disclosure		
Form DR-420TIF	Tax Increment Adjustment Worksheet		
Form DR-422	Certification of Final Taxable Value		
	Taxing authorities indicate final adopted millage rates.		
Form DR-422DEBT	Certification of Final Voted Debt Millage		
Form DR-421	Certification for Taxing Authorities that Do Not Levy Ad Valorem Taxes		
Form DR-487	Certification of Compliance		
	List of compliance requirements.		
Form DR-487V	Voting Record for Final Adoption of Millage Levy		

TRIM forms are available on the Department's **Property Tax Oversight forms website**.

# **Addendum C - Important TRIM Dates**

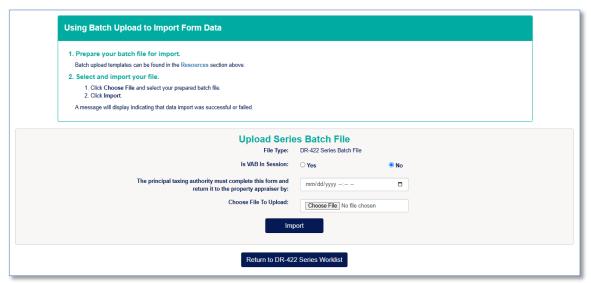
July 1	Last day for the property appraiser to certify the DR-420 Series forms.
July 1 through 31	The board of county commissioners' (BOCC) budget officer delivers a tentative budget to the board.
August 4	Last day for taxing authorities to certify Form DR-420, Form DR-420MMP, and any additional forms 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 (Could be advertised as early as September 4, depending on the tentative hearing date.)	<ul> <li>The taxing authority must advertise its intent to adopt a final millage rate and budget within this period.</li> <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-422 Series via batch upload for either the DR-422 Series Completion or the DR-422 Post-VAB Series Completion, click the Batch Upload button on the Property Appraiser Worklist.



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



The example above is for batch upload for **DR-422 Series Completion**. When completing a batch upload for **DR-422 Post-VAB Series Completion**, the VAB question and completion date are not required. The example below is for batch upload for **DR-422 Post-VAB Series Completion**.



If the batch upload is for **DR-422 Series Completion**, select **Yes** or **No** in response to "**Is VAB In Session**" and enter a date and time in response to "**The principal taxing authority must complete this form and return it to the property appraiser by**."

#### 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, or 4).
    - 1 for Form DR-422 (non-school)
    - 2 for Form DR-422DEBT
    - 4 for Form DR-422 (school)

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-422** (school and non-school) and **Form DR-422DEBT:** The required fields for each line of data 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 (see description above)		1, 2, or 4
Field 3	Levy ID		Numeric
Field 4	Final Current Year Gross Taxable	Form DR-422 - Line 2 or	Numeric
	Value	Form DR-422DEBT - Line 2	

A Microsoft Excel file containing four templates is available under the **Resources** tab within OASYS eTRIM. The file has two 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 <u>addendum E</u> 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.

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

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

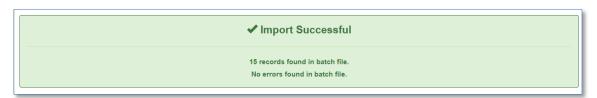
For example, this file has extra commas after the last value in the line.

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

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.



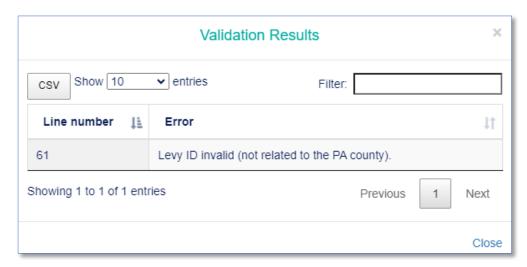
If the validation fails, no data will transfer from the batch file and a message with a link to view an error list will display. Click the linked text labeled **View error list**.



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.



When all batch upload files have been imported successfully, click the **Return to DR-422 Worklist** button at the bottom of the screen to return to the **Property Appraiser Worklist**.

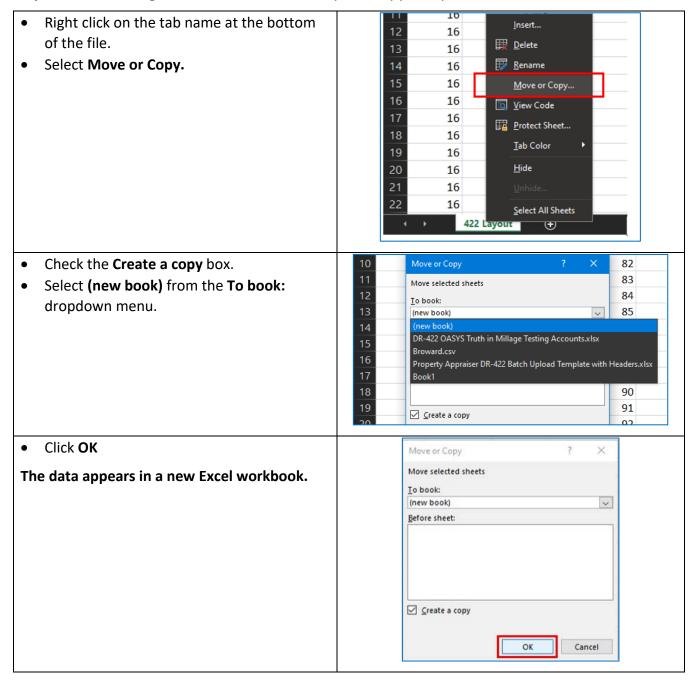
**NOTE:** Closely review the **Property Appraiser Worklist** to check that all form statuses show as **Complete.** Any forms not completed using the batch upload process should be completed manually (see <a href="section 5">section 5</a>). Click the **View/Edit** button to review each form prior to certifying them (see <a href="section 6">section 6</a>). 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 <a href="mailto:pto-oasys@floridarevenue.com">pto-oasys@floridarevenue.com</a> for assistance if you experience persistent issues with the batch upload process.

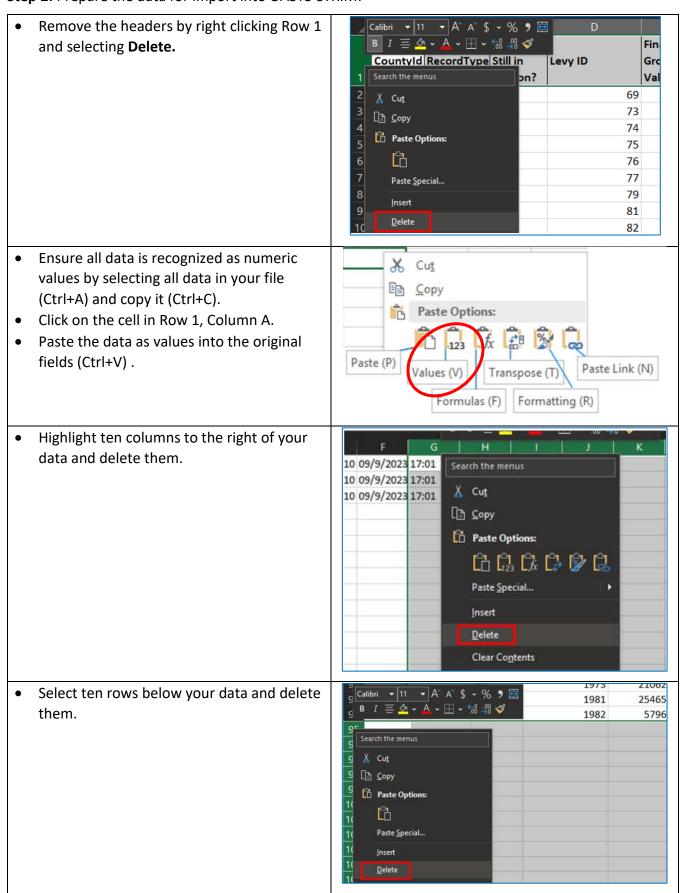
#### Addendum E - Converting Excel Template to .CSV or .TXT

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.

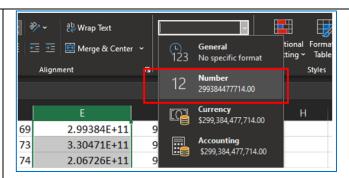
**Step 1:** After inserting the form data into the template, copy the spreadsheet to a new workbook:



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

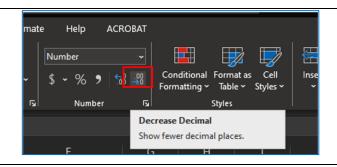


- Highlight columns that contain dollar values and format them to numbers. The columns need attention:
  - DR-420 file: columns D, E, F, G, H
  - DR-420DEBT file: columns D, E, F
  - DR-420S file: columns D, E, F, G, H
  - DR-420TIF file: columns E, F, G
  - DR-422 and DR-422DEBT file: column E



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. New □ Open ⊞ Get Add-ins Save As Save as Adobe Print Share Export Click Change File Type. Export ⋒ Home Create Adobe PDF New D Open Create PDF/XPS Document □ Get Add-ins Change File Type

Change File Type

Workbook (Fig. Types

Wor