



BS&A SOFTWARE

4th Quarter Newsletter
October 2009 - December 2009

Equalizer Software Systems

Property-Based

- Assessing
- Equalization
- County/Local Tax
- Delinquent County Tax
- Delinquent Personal Property
- Special Assessments
- Principal Residence Exemption Audit
- Drain Assessment
- Building Department

Fund Accounting

- General Ledger
- Accounts Payable
- Cash Receipting
- Miscellaneous Receivables
- Payroll
- Human Resources
- Timesheets
- Purchase Orders
- Fixed Assets
- Utility Billing

Companion

- Animal Licensing
- Cemetery Management
- Business Licensing
- Complaint Tracking
- Internet Services

BS&A Briefings

Making You Our Number One Priority!

Thanks to all who completed the 2009 Products and Services Evaluation. We greatly appreciate your feedback. Not only are we happy to hear from satisfied customers, but we appreciate your comments and suggestions on what and how we can improve for the benefit of our customers. It has always been our philosophy to focus on superior customer service and coordination of new product development. We believe that creating effective software solutions means thinking strategically about the product need and developing open communication with you, the end-user, regarding product enhancements. This is exactly how and why we developed Equalizer .Net.

If you didn't have a chance to complete our latest survey and wish to do so, feel free to contact us. If you'd like more information about .Net, visit our website and check out our online demos.

Important Dates...

Conferences:

October

- COCM - 10.6.09 - 10.9.09
- MMTA - 10.18.09 - 10.21.09
- MATS - 10.23.09

Office Closed:

November

- Thanksgiving - 11.26.09 - 11.27.09

December

- Christmas - 12.24.09 - 12.25.09
- New Year's Eve - 12.31.09
(closed @ noon)

// Leadership is practiced
not so much in words as in
attitude and in actions. //

Harold Geneen

14965 Abbey Lane
Bath, MI 48808
517.641.8900
517.641-8960
www.bsasoftware.com




.Net News

Approximately 300 total customers (Assessing, Tax and Fund Accounting) have already been converted to the .NET application. The conversion has gone very smoothly and over-all has been well received. With any new major software release there have been minor bugs and other issues, but all-in-all we have been very happy with the transition to .Net. We want to hear from the Municipalities that have converted to the .NET application. If there are any program features, or persistent bugs that you would like us to look at, please send an email, through the Program; located under HELP/EMAIL TECH SUPPORT.

We will take a look at all the program features and if it appears to be a good fit for all Gov Units we will initiate a change.

Assessing System

Program Points (Pervasive Version)



There have been several small changes to the Assessing system. As always those users with internet access can visit our website at www.bsasoftware.com and download the latest update. There is also a CHANGE LOG on the site that will give a list of all of the changes contained in the update as well as any prior changes. The Change log now lists any change that will have an effect on calculations or values in **RED** text, **BLUE** text represents a new feature added to the system, and **BLACK** text represents general bug fixes not including value/pre changes.

L-4015/L-4017 Sales Study Reports
Due to the Memo from the STC on June 4, 2009, *Revised Equalization Study Time Periods*, both the Pervasive and .NET applications have been updated with the changes outlined in this directive. You will want to make sure that you are on the latest version available in both the Pervasive application and the .NET application.

Assessing .Net

We intend to convert municipalities to the .NET application through December of 2009 +/- and resume again after March BOR next year.

For more information on the .NET application and its features, visit our website at www.bsasoftware.com.

Tax System

Program Points (Pervasive Version)

Interest and Penalty

Verify that your interest and penalty information is setup correctly prior to taking delinquent payments. Once payments have been applied with interest and penalty amounts, you will not want to make any changes to your

interest/penalty setup dates without contacting us.

When honoring postmarks, please use the current date as your posting date and set your interest date to the postmark.

If you use a printing company to print the interest due on your tax bills, be sure to check **several** parcels, as their numbers may be rounded differently than ours at times.

As the winter tax season quickly approaches we want to offer a few reminders:

1. Run a mini-settlement to make sure you balance to date. This will make the end of year balancing run more smoothly. Many municipalities run these reports monthly to assure payments and disbursements are up-to-date.
2. Run a Questionable Parcels/Payments Report. *Reports > Balancing/Settlement Reports > Questionable Parcels/Payments Report on All Records*. Any parcels on this report will need to be cleared up. The goal is to have a blank report.
3. Run a Balancing Recap Report. *Reports > Balancing/Settlement Reports > Balancing Recap Report on All Records*. The last column in this report will provide totals for all payments received to date. Compare this to all disbursements added up to date, plus payments not disbursed. These totals should match.
4. Prepare and balance any Special Assessments that will be added to Winter bills.
5. Double check winter millage tax tables. As always have a second set of eyes view your tax bills and/or tax tables to assure correct millages. Remember to take "County" Operating Tax off the winter tax tables.
6. Run a couple of bills out of each school district to verify for correctness.
7. If you print a bar code, make sure it scans correctly into the Tax System or the Cash Receipting program you are using.
8. Make sure you have a signed Tax Warrant from your Assessor prior to collecting taxes.

Special Assessments (Pervasive Version)

Before Transferring EQ Special Assessments to Tax please verify that the database you are linked to is the correct database. If you need to change the path the EQ Tax Database remember to exit the EQ Special Assessment application to activate the link.

The [Special Assessments .Net](#) version is expected to be released mid-September.

Tax .Net

- Verify your interest & penalty dates are correct
- Once payments are taken you will not be able to change these settings without reversing payments and help from tech support.



BS&A Babies...

Congratulations to Program Developer, Chris Stackable and his wife on the birth of their first son, Jacob Paul, born June 1st.

We also congratulate Jason Hafner, Fund Accounting Department Manager, and his wife on the birth of their son, Kevin Carl, born June 27th.

- Ask your Assessor about the ability to grant access for Direct Imports for BOR's (also available for courtesy splits and values)
- You can pay both seasons in the apply payments screen
- You can run reports, such as the Quick Tax Disbursement report, for both seasons.

Fund Accounting

Program Points

As we wrap up the first year of .Net installations, we will continue to focus our efforts there. In-house classes for Fund Accounting, Payroll and Utility Billing will resume in first quarter, next year.

We appreciate your understanding. Remember, our support staff is always available to help should you need assistance with anything.

**We now have approximately 90 Municipalities on the .Net Version.

Building Department

Program Points

As usual, we have released several update patches to address certain concerns found in the software. We recommend that you

update your program to the latest version at your earliest convenience and continue to update on a weekly or monthly basis. This can easily be done by going to Help|Download Latest Version from within the Building Department application.

.Net Compatibility

The .Net version of Cash Receipts, Accounts Payable and General Ledger systems are currently available.

Because of this, a link between Pervasive Building Permits and these .Net applications has been established. In addition, the .Net Assessing application has also been released. Those Permit customers using the .Net Assessing application are no longer able to do a direct import between the programs, but instead must create an export file to enable the transfer of information. If you require any assistance in this matter, please feel free to contact Permit Support.

Help/View Support Page (Web)

As always, please visit the Building Department System support web page to access the latest program update, instructional documents, and other files.

Work In Progress - We are creating a help document to assist your department in managing the tracking of

foreclosed/vacant homes in your jurisdiction with regard to registration, inspections, etc. Check back often...

Help/View Latest Program Changes (Web)

Please note that not all updates are discussed in this log file as some changes are relatively unimportant and unnoticeable while others are user specific. Only significant changes are noted on the support web page.

Old Version

Please contact building support at 517.641.8900 or permitsupport@bsasoftware.com for information about updating to the new version of the Building Department software.

Note: Before You Call

On occasion, you may have a concern or temporary problem while working within the Permit Program. Please note that it may be possible to avoid a phone call to Permit Tech Support simply by going to Help|Download Latest Version and running the Automatic Download. If that is unsuccessful, try rebooting the workstation that is experiencing difficulty. If you continue to have problems, please contact Permit Tech Support and we will be more than happy to assist you in resolving the issue.

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Field Inspection (Tablet) Application - .Net Version

We are currently providing proposals for the Field Inspection Application, soon to be released. This program is replacing the existing Pervasive based Replication Module and although it will continue to be supported, no further Replication proposals are being given. If you have any questions, please contact Permit Tech Support for assistance.

Host I.T. Right

Dnn Web Design Class

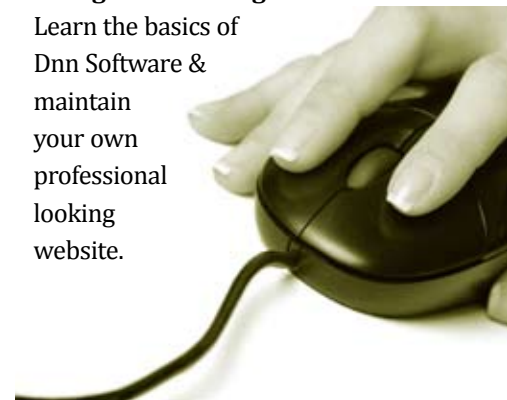
This is a FREE class offered by I.T. Right.

Instructor: Daniel P. Eggleston, MCSE+I & Melissa Eggleston of IT RIGHT

Classes are held at BS&A Software from 9 to noon. Please call I.T. Right to register 517.318.0350

IT Right Web Design

Learn the basics of Dnn Software & maintain your own professional looking website.



Technical Support & Training Information...

Annual Support Fee Note

Your "Support Agreement," which covers program updates and technical support, for the Windows version of our software, guaranteed that fees will not change for the first three years that your municipality uses our software. After that time we reserve the right to increase fees by the cumulative Consumer Price Index. Therefore, if you purchased a program in 2006, or prior, your 2009 Support Fee will increase.

Technical Support

We encourage you to take advantage of using email to contact our support staff. This is especially useful for those customers who do not work in their offices each day during regular business hours.

Please keep in mind not all situations can be handled through email. Occasionally we may need to speak with you.

Assessing	asgsupport@bsasoftware.com
Tax	taxsupport@bsasoftware.com
Delq Tax	dlqtax@bsasoftware.com
Delq Personal Property	taxsupport@bsasoftware.com
Special Assessment	taxsupport@bsasoftware.com
Building Dept.	permitsupport@bsasoftware.com
Utility Billing	fundacc2@bsasoftware.com
Fund Accounting	fundacc2@bsasoftware.com
Internet Services	is@bsasoftware.com

Sending Data/Messages to Support

Please remember to note on your envelope or enclosure the department or person that has requested the data. It is also important to label the diskettes or CD sent. Our goal is to serve you as quickly as possible and unlabeled items could cause a delay in that process.

Sending BS&A data or a question via email:

- 1) When sending emails to any of our departments please put the name of your unit, your name and phone number in the subject line. For security reasons we delete any unknown emails.
- 2) You may also go to our web site, or in some cases, directly through the program, to email us.

Remember...

If Tax data is being converted: Grand Totals & Millage Rates for each school district must be included.



"Learning is a kind of natural food for the mind."

Marcus Tullius Cicero

Assessing Courses

Level I - Program Introduction & Setup

Recommended for the Assessor or designated new user of the Assessing/Equalization System. The course will cover all master list setup in Program Management and its importance in data entry and reporting. Roll balancing and frequently used reports will also be covered. Understanding the importance of a plan to remove parcels from the override calculation status will be discussed.

Level II - Assessment Roll & Data Entry

This course demonstrates how to perform the assessment roll including name/address changes, sales, uncapping, P.R.E.s, building permits, and processing splits. Entering all types of appraisal information will also be covered.

Level III - Land Tables, ECFs & Sales Studies

Designed for the user that will be responsible for creating/maintaining land rates, analyzing/setting ECFs, and performing sales studies. The course will also review related reports for each of these features.

All classes, with the exception of the 'Net Training Classes' will continue to use the Windows Version for demonstration purposes.

Level IV - Assessing Cycle & Special Acts Parcels

This course reviews the entire assessment cycle, beginning with creating a new assessment year database, rolling over the database, and processing all types of adjustments through end of assessment roll review (needed prior to sending Change Notices). As a part of this course, Special Acts parcels will be reviewed with ideas and reports that are useful for managing special rolls.

Apex Sketch

This class will cover the use of the Apex IV or Medina Version Assessor sketching program to draw both buildings and land, and its integration into the Equalizer Assessing System.

Personal Property

This one-day class is designed for assessors, appraisers and other office staff who perform duties pertaining to the processing, data entry and reporting of Personal Property. Topics discussed in detail are printing of the personal

property statements, processing statements, assessing buildings on leased land, estimating assessments for non-filers and Board of Review changes.

Commercial/Industrial

This one-day class will cover the details of inputting Commercial/Industrial structures into the Equalizer Assessing System. Examples of Calculator, Segregated, Unit-in-Place and Income Capitalization will be used.

Splits/Combination

A one-day class to cover parcel splits/combinations in the Assessing System.

6-Hour Continuing Education Credit

All Equalizer Assessing & Tax Courses listed are hands-on and held at BS&A's training facility. The State Assessors Board has approved these elective courses for 6-hour continuing education credit.

.Net Assessing Training

Designed for the experienced user of the current EQ Assessing application, this course will introduce the user to the new .Net Assessing system. Topics covered include the conversion process and new features, as well as the acclimation of changes from the old to the new system.

All classes, with the exception of the 'Net Training Classes' will continue to use the Windows Version for demonstration purposes.

Tax Courses

Level I - Introduction & Creating a Tax Roll

Recommended for the Treasurer or person creating their first tax roll using the EQ Tax System. Course covers general setup and tax setup items relevant to creating a tax roll. Importing from EQ Assessing, developing a tax roll checklist, and establishing millage rates for all billing types is also covered, as well as working with mortgage information and reviewing options for adding special assessments to the tax bill. A review of the reports available for balancing purposes and tax bill printing throughout the roll setup will be presented.

Level II - Working with the Tax Roll

Designed for any Tax System user working with an existing tax roll throughout the course of the collection cycle. Roll maintenance such as name/address updates, mortgage codes, deferments, and handling taxpayer inquiries will be covered. Course will also include payment processing, adjustments, and roll balancing with reports related to each item.

Equalizer Special Assessment System

Program setup and creating a multi-year, principal/interest type of Special Assessment District with various benefit calculation methods will be covered. Creating a separate billing for special assessments and/or billing the annual installment on a current tax bill will also be reviewed.

Delinquent Personal Property System

Designed to acquaint new users with the Equalizer Delinquent Personal Property System. Topics discussed in detail are initial setup, data entry, generating reports, entering general ledger account numbers, and receipting. Also discussed will be the use of the built-in Report Writer.



Report Writer, Queries and Filters for Tax & Assessing

Designed for any interested Equalizer Assessing or Tax System users. The features of the Report Writer are the same for both systems and will be covered in detail. Examples are given of creating custom reports.

.Net Tax Training

Designed for the experienced user of the current EQ Tax application, this course will introduce the user to the new .Net Tax system. Topics covered include the conversion process and new features, as well as the acclimation of changes from the old to the new system.

Building Dept. Courses

Introduction Course for Inspectors

Designed for inspectors & code enforcement officers, this class will focus on those features most important to individuals responsible for managing these activities. Included in this course will be such items as Code Enforcement setup and techniques, Permit setup and inspection techniques, how to view/print the daily schedule, how to create automatic reminders, how to set up and use rental certification cases, and a host of other useful features.

Introduction Course for Support Staff

This class presents the fundamentals necessary for data entry and primary program management and is designed for those users who are new to the System and wish to learn how to best utilize the System in their daily operations. Class contents include program setup features, how to add permits, schedule and print daily inspections, add inspection results, print standard formatted letters, how to set up and manage projects, and how to best utilize the automated reminder feature as well as many other components useful operations.

Administration Staff (Advanced)

Created for administrative-level users, this class covers more advanced features and how to best utilize the System for property information management. Topics covered in this class are Report Writing and Letter Writing instructions. Also included in this class will be such

items as project management issues, user account management, maintenance utilities, name management information, mass letter writing features and other administrative-level topics. Suggested prerequisite: Support Staff Introduction Course.

New Version Introduction (Windows System)

This class is designed for the experienced user (administrators and office staff) who are familiar with the original Permit System and who wish to learn the new features available with the new version. This course will cover such items as Rental Certification, Inspection Deficiency window, Reminder Management, new Naming Configuration issues and their impact, financial features, and Mass Letter-writing techniques.



Retake a class for free! If you would like to brush up on recently learned skills, you may retake the same class within 6 months free of charge if space is available. Call for details.

Equalizer Software Training Schedule

4th Quarter, 2009

	Monday	Tuesday	Wednesday	Thursday	Friday
October				1	2
	5 Tax Level I	6 Tax Level II	7 Special Assessments	8	9
	12 .Net Assessing Training	13 .Net Tax Training	14 APEX Sketch	15 Asg/Tax Report Writer	16 I.T. Right Dnn Web Design
	19 Bldg. Dept. Inspector Intro	20 Bldg. Dept. Support Intro	21 Bldg. Dept. Administrative	22 Bldg. Dept. New Version Conversion	23
	26 Assessing Level I	27 Assessing Level II	28 Assessing Level III	29	30
November	2 Assessing Level IV	3 Asg/Tax Report Writer	4 Personal Property	5	6
	9 .Net Assessing Training	10 .Net Tax Training	11	12	13 I.T. Right Dnn Web Design
	16 Bldg. Dept. Inspector Intro	17 Bldg. Dept. Support Intro	18 Bldg. Dept. Administrative	19 Bldg. Dept. New Version Conversion	20
	23	24	25	26 Thanksgiving	27 Closed
	30 Assessing Level I				
December		1 Assessing Level II	2 Splits & Combination	3	4
	7 Bldg. Dept. Inspector Intro	8 Bldg. Dept. Support Intro	9 Bldg. Dept. Administrative	10 Bldg. Dept. New Version Conversion	11
	14 Tax Level I	15 Tax Level II	16 Delinquent Personal Property	17 APEX Sketch	18
	21	22	23	24 Christmas Eve	25 Christmas
	28	29	30	31 New Year's Eve Closed at Noon	

Groups of 4 or more may schedule Assessing & Tax Training in Big Rapids with Dan Kirwin. Contact 517-819-3625.

Registration Information

4th Quarter, 2009

Location

Training classes are held in our office in Bath, MI. BS&A Software has historically been a casual company and we encourage our customers to dress comfortably when attending a class. Feel free to wear jeans or shorts (weather permitting, of course)!

Instructors

Typically, class instructors will be Dan Kirwin (Assessing & Tax), Chris Polack (Tax), Jeff Howe (Building Department), Bill Garner (Utility Billing) or Jason Hafner (Fund Accounting). Occasionally, another qualified member of our staff may teach a class, depending on the availability of the primary instructors.

Class Time

Each class is one full day from 9:00 a.m. - 4:00 p.m. with a lunch break. Lunch is on your own; restaurants will be discussed in class.

Class Fees/Invoicing Information

Class fee is \$195 per person/per class. We ask that you DO NOT send payment until you are invoiced. Advanced registration is required by filling out and returning the form below. Sorry, no phone reservations will be accepted.

Confirmation

Confirmation of your registration will be sent prior to the scheduled class date(s). This will include directions to our office and hotel information. No hotel rooms are blocked; reservations are the responsibility of the attendee(s).

Cancellation Policy

BS&A Class Cancellation: At least four (4) individuals must be registered for a class to be held. In the event of low registration, the class will be cancelled. Those registered will be notified at least one week prior to the scheduled date and will be given priority to register in the next available class.

Attendee Cancellation: Cancellation by attendees made less than four (4) working days prior to class, or a "no-show" without prior notification, will result in a \$50 administration fee per attendee.

Mail or Fax Completed Form to:
 BS&A Software ~ 14965 Abbey Lane ~ Bath, MI 48808
 Fax 517.641.8960

Class	Date	#Attending	Registrant Information
Assessing			
Assessing Level I	_____	_____	Unit: _____ County: _____ Contact: _____ Phone: _____ Email: _____ Attendees: _____ _____ _____ _____
Assessing Level II	_____	_____	
Assessing Level III	_____	_____	
Assessing Level IV	_____	_____	
Personal Property	_____	_____	
APEX Sketch	_____	_____	
Commercial/Industrial	_____	_____	
Splits & Combination	_____	_____	
.Net Assessing Training	_____	_____	
Tax			
Tax Level I	_____	_____	
Tax Level II	_____	_____	
Special Assessments	_____	_____	
Delinquent Personal Property	_____	_____	
Asg/Tax Report Writer	_____	_____	
.Net Tax Training	_____	_____	
Building Dept.			
Inspector Intro	_____	_____	
Support Staff Intro	_____	_____	
Administrative (Advanced)	_____	_____	
New Version Conversion	_____	_____	
I.T. Right Course			
Web Design (9am-Noon)	_____	_____	

Please provide an alternate phone or fax number in the event we cannot reach you at the number provided above.

_____ - _____ - _____

*** Please note: If you do not receive a confirmation within 2 business days upon submission of your registration, please call us to confirm your reservation for the class.**



14965 Abbey Lane
Bath, MI 48808

www.bsasoftware.com

Newsletter & Training Schedule - 4th Quarter, 2009

Offering unparalleled client service and support while continuously perfecting our software applications...all at a fair and reasonable price.

Hotel Information

Sleep Inn
1101 Commerce Park Dr, Dewitt
517-669-8823 or 1-866-613-9330

Courtyard By Marriott
2710 Lake Lansing Rd, Lansing
517-482-0500 or 1-866-613-9330



Directions to BS&A Software Bath, Michigan

- I-127 NORTH (Jackson area) - Travel North on I-127 to I-69 East to Webster Rd Exit (Exit 92)
- I-69 NORTH (Marshall area) - Travel North on I-69, continue on East I-69 towards Flint, to Webster Rd Exit (Exit 92)
- I-27 SOUTH (Mt. Pleasant area) - Travel South on I-27 to I-69 East towards Flint, to Webster Rd Exit (Exit 92)
- I-69 WEST (Flint area) - Travel West on I-69 to Webster Rd Exit (Exit 92)
- I-96 WEST (Detroit area) - Travel West on I-96 to I-127 North, then East one I-69 towards Flint, to Webster Rd Exit (Exit 92)

The office is located off Webster Rd in Somerset Park, North of I-69 approximately 1/4 mile. Turn Right into Somerset and Right at the stop sign, which is Abbey Lane. We're all the way around to the back.