

## BCEO Tax Map Office Document Approval Application Instructions

### ❖ Register a new account

- On the home screen click on Register a new account
- Complete the form and click on Sign Up
- An email will be sent to the email that was submitted with the link for the document submittals. Once the email is received and the account is registered the user may begin submitting documents for review. Be aware that this email might go to your spam or trash, instead of your inbox unless you have white listed submittals.bceo.org in your email settings.
- The username is the email that was submitted on the form, the password is the password that was submitted on the form.
- If there will be multiple submitters for one company, the tax map office can create an organization for all submitters in that company. This will allow all submitters to see all submittals from the same company. If you would like an organization created for a group of submitters please send an email form the "Contact Us" tab in the left pane under "Support".

### ❖ Dashboard

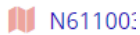
- The dashboard has information about documents that have been reviewed since the last the user logged onto the site. The dashboard also shows broadcast messages in the main panel and notifications in the upper right area designated by the bell icon. In the upper right-hand corner there is either a green block showing that there is a network connection or a red block showing that there is no internet access to the site.
- Broadcast Messages are messages sent from the Butler County Tax Map Office to everyone.
- Notifications are messages from the Butler County Tax Map Office to individual clients which will show the change in status of a submittal. Click on the bell icon in the upper right-hand corner and click on acknowledge notifications to show that they have been read.
- In the left-hand panel there is a category called Submittals. Click on Submittals to see the following options.

### ❖ Submittals

#### ➤ Create New Submittal

- Submittals are created by users who want to pre-approve legal descriptions for the transfer of property by the Butler County Auditor's Office.
- **Submittal Tab**
  - **Title** – The title can be anything that the submitter wants to use to be able to track the submittal.
  - **Submission Notes** – The submitter may add any instructions or comments to the submittal for further instructions or questions for the Butler County Engineer's Office Tax Map Office
  - **Parcels**
    - ◆ Click Add Parcels – The parcel numbers will need to be typed in separately. Click on Add Parcels, type in one parcel number, click on Save. Type in all parcel numbers that are associated with the legal description. As the parcel numbers are typed in the auto complete will show a list of active parcel numbers in that range.

#### Parcels



- ◆ Next to the parcel number will be a red icon, if you click on the icon it will link to open the BCEO Tax Map Web Map and zoom to the parcel number.
- ◆ Before the document is submitted for review the user can also delete a parcel number if it is incorrect.

#### ▪ Submitted Documents Tab

- Drop files here or Click here to add files – The submitter can either drag document files to the grey box or click within the grey box to add files by browsing to the location of the file. Please submit a file in pdf format.
- **Save** – The submittal can be saved to submit for review later. If the submitter clicks on the save button it will not be submitted to the Butler County Tax Map Office for pre-approval.
- **Submit for Review** – Click this button when the submittal is ready to be sent to the Tax Map office to be reviewed. At this time a dialog box will appear to confirm yes or no that the user wants to submit the document. Once the document is submitted to the Butler County Engineer's Office Tax Map Office the user will not be able to edit it in any way. After the document is submitted for review the submittal can be viewed by clicking the "Document Submittals" in the left pane. The user will only be able to download the Approved Documents when approved by the Tax Map Office.
- **Document Submittals** - a list of all submittals that have been created by the submitter or the submitter's organization
  - **Search** - used to query the list for submittal titles
  - **New Document Submittals** – activates the Create New Submittal page

- **Status drop down** – used to query the list for submittal status types
- **Submittals By** – used to filter the query search by user name
- **Today Only** – click on this box to see only submittals for the current day
- **Show Archived** – when the submittal is complete the user can archive the submittal and the submittal will not show up in the general list of documents, click on this box to see the documents that have been archived
- **Click a Title to open a Document Submittal**
  - **Submittal Tab**
    - **General**
      - ◆ **Submittal Date Time** – the date and time the submittal was created
      - ◆ **Title** – the name given to the submittal by the user
      - ◆ **Submission Notes** – comments added to the submittal by the user for further instructions or questions for the Butler County Engineer’s Office Tax Map Office
    - **Parcels** – List of all parcel numbers which have been part of any document submittal. Click on the plus sign to see a list of the document submittals for that parcel number. Click on the submittal title to see the original submittal document window.
    - **Approval Status** - the status description changes as the document is being processed. When the status changes and the submittal is updated a notification is automatically sent to the user.
      - ◆ **Status:**
        - **Submittal Created** – the user has created a submittal document but has not submitted it for review to the Butler County Engineer’s Office Tax Map Office for approval.
        - **Submittal Ready for Review** – the document has been submitted for review, once the submittal is ready for review the Tax Map office is able to review the documents.
        - **Document is being Reviewed** – the document has been opened for review by the Tax Map office
        - **Document Denied** – the document has been denied and needs to be re-submitted. The Tax Map office will explain why the document could not be approved in the Status Comments section of the submittal. To resubmit the corrected submittal, follow instructions below **“How to Resubmit when Status is Document Denied”**
        - **Document Approved with Attached Survey** – The document was approved and stamped, a new survey was submitted to the Tax Map office prior to the submittal and a copy of that survey is attached to the legal description.
        - **Document Approved Survey Needed Next Transfer** – The document was approved with the stamp **“Survey Needed Next Transfer”**. The next time this document is submitted for transfer a new survey needs to be completed to clear up the legal description, the legal description does not match the current parcel. Comments from the Tax Map office will be typed in the Status Comments on the document submittal.
        - **Document Approved** – the legal document was approved and stamped and is ready for transfer.
        - **More Research Needed** – the Tax Map office is researching some discrepancies that may exist on the tax map
        - **Resubmittal Started** – when a document is Denied, the submitter can start a resubmittal, the status will change when the submitter clicks on Resubmittal button.
        - **Submittal Corrected** – new documents were not added, however more information was added to the submittal
        - **Submittal Archived** - the submitter can archive an approved document so it is not listed in the document panel unless the Show Archived button is activated.
      - ◆ **Status Date** – the date the status description changed
      - ◆ **Status Comments** – comments from the Butler County Engineer’s Office Tax Map Office
      - ◆ **Reviewer Name** – the name of the person at the Butler County Engineer’s Office Tax Map Office who reviewed the document
  - **Submitted Documents Tab**
    - **Original File Name** – List of the original, unstamped files which were submitted to the Tax Map Office. The document can be downloaded by clicking the red download icon next to the file name.
    - **Upload Date** – the date the document was added to the submittal
  - **Approved Documents Tab**
    - **Original File Name** – List of the original files which were submitted to the Tax Map Office, reviewed by the tax map office and stamped. The document can be downloaded by clicking the red download icon next to the file name. The file can be deleted by clicking the red trash can next to the file name.
    - **Upload Date** – the date the document was approved and added to the submittal.
  - **Status Timeline Tab**
    - A list of the status changes, the date and time of the status changes and names of submitters and reviewers for each status change.

- **Notes Tab**
  - This tab is only used when the user is re-submitting a denied document for approval.
- **Parcels**
  - A list of parcels that were involved in any submittal. Click on a parcel number to see a list of all submittals that involved the current parcel.
- ❖ **Parcel Research**
  - **Municipalities** – a list of the townships and cities within Butler County
    - **Full Name** – click on the name of a township or city
      - **District** – click on the name of the district, there is a list of taxing districts in that district
      - **Description** – list of the school district in the taxing district
      - **Tax Book Title** – the name of the tax book where the taxing district can be found
  - **Tax Books** – list of the Butler County Tax Map Books
    - **Book Title** – list of Tax Map Book titles
    - **Description** – explanation of what is in the tax map book
  - **Parcels** –
    - **PIN** – parcel number for each parcel that has been part of a conveyance (the list is from conveyances that happened since the creation of the submittals application, in the future, the Tax Map office will work on populating parcel numbers for conveyances before this time)
      - **Parcel Number** – click on a parcel number to view the Parcel Report
        - ◆ **General Tab**
          - **PIN** – parcel number
          - **Taxing District** – taxing district number
          - **Page** – tax map book page of the parcel
          - **SubPage** – some tax map books have subpages, this is the number of that subpage
          - **Parcel Number** - the number designating that parcel within the specific taxing district
        - ◆ **Senior Plats Tab** –
          - **Plat Type** – the type of plat (Plat of Survey, Record Plat, etc)
          - **Id1** - Volume or Envelope of the plat
          - **Id2** – Page of the plat
        - ◆ **Junior Plats Tab** –
          - **Plat Type** – the type of plat (Plat of Survey, Record Plat, etc)
          - **Id1** - Volume or Envelope of the plat
          - **Id2** – Page of the plat
        - ◆ **Parcel Image** – a screen shot of the parcel from a link to the Butler County Tax Map Interactive Map
- ❖ **Support**
  - **Resources**
    - Document Submittals User Guide – link to instructions for the submittals application
    - Butler County Conveyance Standards – link to Conveyance Standards
    - Ohio Revised Code – link to orc
    - - link to Interactive Tax Map
  - **Release Notes** – Update information about the application
  - **Contact Us**
    - Fill in the form and an email will be sent to the tax map office
    - THIS IS ONLY TO BE USED FOR GENERAL QUESTIONS AND QUESTIONS ABOUT THE APPLICATION NOT QUESTIONS ABOUT A SUBMITTAL.
- ❖ **How to Resubmit when Status is Document Denied**
  - Click on Document Submittals, click on a submittal where the Approval Status Description is Document Denied
  - Click on **Begin Resubmission** button
    - **Submittal Tab**
      - **Submission Notes and Status Comments** - any notes or comments are copied to the Notes tab so that any new Submission Notes or Status Comments can be added to the resubmittal
      - **Status** - changes to Resubmittal Started
      - **Status Date** – changes to current date of Resubmittal
      - **Parcels** - delete and add correct parcel numbers if needed
    - **Submitted Documents Tab**

- **Original File Name** – (Prior) is now added to the list of the original, unstamped files which were submitted to the Tax Map Office. The document can be downloaded by clicking the red download icon next to the file name.
- **Upload Date** – the date the document was added to the submittal
- **Add New Documents** – new and/or corrected documents can be added here for the resubmittal
- **Approved Documents Tab**
  - Blank
- **Status Timeline Tab**
  - A list of the status changes, the date and time of the status changes and names of submitters and reviewers for each status change.
- **Notes Tab**
  - any notes or comments that were added to the original submittal in the Submission Notes or Status Comments will be copied to this tab