



SUBMITTING SALES ELECTRONICALLY USING DLS GATEWAY

August 2010

Robert G. Nunes, Deputy Commissioner and
Director of Municipal Affairs
David L. Davies, Director of Information Technology

SUBMITTING SALES ELECTRONICALLY USING DLS GATEWAY

Introduction.....	3
Available Tools	4
FY 2010 Non-Arms Length (NAL) Codes – Revised June 2009	5
Overview: Submitting LA-3 Sales Data Electronically via DLS Gateway.....	6
Tips for Preparing Your Sales Data for Submission.....	7
Special Instructions for Interim Year Adjustment bulk uploads: Prior Year NAL and State Use Codes	8
Searching for Sales Using DLS Gateway	10

Introduction

BLA uses Property Sales Reports (the LA-3) to conduct assessment/sales ratio studies. Beginning with FY 2010, the Bureau of Local Assessment is requiring annual sales submissions by all communities; these sales will be used to automatically generate sales statistics for certification, interim year adjustment (the LA-15) and the EQV process. In order to conduct an accurate study, data needs to be submitted on all sales over \$1,000.

The Bureau of Local Assessment publishes the specific format required for sales data submission in its Classification Codes and Sales booklet. This booklet was last revised in late June, 2009, and can be downloaded, printed or viewed on our web site:

www.mass.gov/dor/docs/dls/bla/classificationcodebook.pdf

Communities using computer-assisted mass appraisal (CAMA) systems usually have the ability to produce a data file consisting of real estate sales occurring within a specified timeframe. This file can be used as the basis of an electronic submission; the DLS Gateway now contains an LA-3 module that allows uploading, verifying and certifying of sales data. This user guide will give you the instructions necessary to take a data file from any CAMA system and turn it into an LA-3 submission.

Submitting sales information electronically benefits municipal officials, real estate professionals and the general public by making sales data readily available online. Sales data contained in the Gateway database can be searched, viewed and even exported to Microsoft Excel.

Another benefit for municipal assessors is the ability to produce an LA-15 Interim Adjustment Report for use in the tax rate setting process, simply by uploading sales through Gateway. The LA-15 is generated automatically, based on sales submissions and other data stored in Gateway. Starting this fiscal year (2010) it is no longer necessary to enter interim adjustment information manually; the form is generated by Gateway itself, and only requires the review and signatures of local assessors.

The Official Website of the Massachusetts Department of Revenue

Division of Local Services Gateway 

LA3 Parcel Search [Printer Friendly](#) [Login](#)

[View Search Criteria](#) [Reset Sort](#)

Click on column headings to sort.

Number of Records found: 6

City/Town	Sale Date	Parcel Id	Seller	Buyer	St Num	St Alpha	Street Name	Use Code	NAL C Code	NAL E Code	Sale Price	Prior Assessed Value	Current Assessed Value	A/S Ratio
Shelburne	06/18/2008	268/028.D-0005-0000.0	PETERSON, THERESA	WALDMAN, HAWLEY	124		COLRAIN-SHELBURNE RD	101			241,800	247,400	247,400	1.02
Ashfield	06/19/2008	5. 0. 36	SINGER GERALD W,	JP MORGAN BANK, N.A.	136		MURRAY RD	101	L		32,318,560	441,600	435,800	0.01
Ashfield	06/23/2008	7. 2. 0. 59	CANON DANIEL D,	US BANK NATIONAL ASSOCIATION	152		BUCKLAND RD	101	L		112,500	147,700	150,900	1.34
Shelburne	06/30/2008	268/040.0-0055-0000.0	OWENS, KRISTOPHER, MEG	SCHRIBER, PETER E. & SUSAN A.	17		HIGH ST.	101			575,000	553,800	553,800	0.96
Shelburne	07/16/2008	268/012.D-0029-0000.0	DRISCOLL, LINDA & STE	SHEAN, DELIA T.	199		SHELBURNE CENTER RD.	101			174,000	171,000	171,000	0.98
Shelburne	08/01/2008	268/005.D-0013-0000.0	CHIMI, FRANCIS & SHIR	ELISA LLC	422		TAYLOR RD.	101	T	T	245,000	206,700	188,700	0.77

[Export to Excel](#)

© 2009 Commonwealth of Massachusetts [Web Browsers](#) [Contact Us](#) [Site Policies](#)

Available Tools

The Division of Local Services provides a few tools to promote easier submission of sales data:

DLS Gateway's LA-3 module: Sales data can be submitted to BLA using DLS Gateway, which computes statistics for BLA's review automatically. Gateway also uses the sales statistics to create the LA-15 (Interim Adjustment form) necessary for tax rate approval in non-certification years. Sales submissions can be searched, adjusted, verified and then officially submitted by assessors from any computer with Internet access, 24/7.

BLA's LA-3 Format/Character Cleaner template: BLA has a very useful Excel workbook available for download on the Gateway LA-3 Bulk Upload page. This workbook uses macros (embedded programming) to check sales data for proper formatting. It also checks for the existence of special characters that will be rejected by the DOR firewall, which will cause the upload process to fail. This is the URL for downloading the BLA LA-3

Format/Character Cleaner:

http://www.mass.gov/Ador/docs/dls/ghelp/LA3_format_with_character_cleaner.xls

BLA's Property Type Classification Code Booklet: This booklet contains all current property use codes, as well as the current LA-3 specifications and non arm's length (NAL) codes. It was updated the last week of June, 2009 and is available on BLA's Certification page as well as their General Info page. Here is a link to that document: www.mass.gov/Ador/docs/dls/bla/classificationcodebook.pdf

Questions about the LA-3 submission process, NAL codes, the Property Type Classification Booklet or other assessment-related issues can be referred to the Bureau of Local Assessment; contact your BLA advisor directly, or send an email to the main BLA mail account: BLADATA@DOR.STATE.MA.US.

BLA Advisor	Phone number/extension	Email
Sandra Bruso	413-452-3983	bruso@dor.state.ma.us
Jeff Reynolds	413-452-3981	reynoldsje@dor.state.ma.us
Jen Silvia	508-792-7300 x22319	silviaj@dor.state.ma.us
Joe Barbieri	413-452-3982	barbierij@dor.state.ma.us
Scott Santangelo	508-792-7300 x22325	santangelos@dor.state.ma.us
Grace Sandell	617-626-2322	sandellg@dor.state.ma.us
Steve Sullivan	617-626-2393	sullivanst@dor.state.ma.us
Tom Dawley	617-626-2389	dawleyt@dor.state.ma.us
Walter Sandoval-Dusza	617-626-4087	dusazw@dor.state.ma.us
Jack Lyons	617-626-2368	lyonsj@dor.state.ma.us
Nathaniel Cramer	617-626-3937	cramern@dor.state.ma.us

Questions about DLS Gateway itself, including how to obtain an account, how to login or how to submit data can be answered by calling **DLS IT Support at 617-626-2350**, or by emailing DLSITGroup@dor.state.ma.us.

Gateway Help Library: A collection of Gateway Help documents can be found in the Information Technology section of the DLS web site. Click Information Technology on the DLS Main Page, then click the link labeled Gateway Help System.

The Gateway-MASSGIS Connection MASSGIS now uses sales information from Gateway to pinpoint sale locations on local maps. Anyone can locate sales by city/town, property type, sale date, sale price, or a combination of factors. BLA's General Info page has a link to MASSGIS's sales search page: <http://maps.massgis.state.ma.us:8080/LA3/pages/main.jsp>

FY 2010 Non-Arms Length (NAL) Codes – Revised June 2009

With communities now submitting the LA-3 online, the Bureau of Local Assessment recently expanded its list of non-arms length codes in order to minimize the number of reported “N” coded sales. The new codes evolved in response to the most frequent “N” coded explanations received by BLA, and should allow communities submitting the LA-3 to use code “N” less often. The new codes are T, U and V, with code H being expanded to include estate sales. This is the list of allowable NAL codes for FY 2010:

- A. Sale between members of the same family
- B. An intra-corporation sale, e.g. between a corporation and its stockholder, subsidiary, affiliate or another corporation whose stock is in the same ownership
- C. Sale of commercial or industrial real property which includes machinery, equipment, inventories or “good will”
- D. Sale of property substantially changed after the assessment date but before the sale, e.g., sale of a property on which a building was added after the assessment date, or sale of a property which was demolished partially destroyed, subject to fire, flood, or remodeled after the assessment date
- E. Sale to / from federal, state, or local government
- F. Transfer of convenience, e.g., correcting defects in a title, a transfer by a husband either through a third party or himself and his wife to create a tenancy by the entirety, etc.
- G. Sale of only a portion of the assessed unit, e.g., a parcel sold from a larger tract and the assessment is for the larger tract, or a portion is in another municipality
- H. Sale resulting from a court order, e.g., a divorce settlement, **estate sale** (expanded category)
- I. Sale in proceedings of bankruptcy
- J. Sale of an undivided interest
- K. Sale to / from an educational, charitable, or religious organization
- L. Repossession or sale of a foreclosed property
- M. Sale of property, the value of which has been materially influenced by zoning changes not reflected in current assessments
- N. Other, when a non-arm’s length sale does not fall into any other category, this code is used, accompanied by a written explanation
- *O. Sale of property with a substantial physical change after the sale. An example is a house which has been remodeled after the sale, before the assessment date
- *P. Sale of property with a change in use after the sale
- Q. Sale of property which includes both a trade of property and cash for the property conveyed
- R. Sale of property which has been sold more than once in the same year. Only the last sale is used for analysis purposes.
- S. Sale of a foreclosed property. May be arm’s length in special circumstances (must be supported by detailed documentation)
- T. Property sold to an abutter (NEW CODE)
- U. Private sale not put on the market (NEW CODE)
- V. Sale of multiple parcels; code replaces the “G” code, which will now be reserved exclusively for sales which involve property located beyond the community’s boundaries. (NEW CODE)
- W. Sale affected by deed restriction, e.g., 40B housing; also appropriate for parcels under Chapter 40B or Chapters 61, 61A or 61B (NEW CODE)

*Codes used for reporting sales for certification review analysis, when the sale prices are compared to the proposed values. The codes would also be used in the EQV program.

Note: Codes other than the above will not be uploaded. The system will reject a code like QS. The system will convert code with a number following the letter, such as N3, to its single letter value, e.g. N.

Overview: Submitting LA-3 Sales Data Electronically via DLS Gateway

This is the process, in general terms, for submitting LA-3 sales data electronically:

1. Download and save a copy of BLA's LA-3 Cleaner Template Excel file.
2. Create the LA-3 sales data file using your CAMA system.
3. Open the BLA's Excel LA-3 Cleaner template file.
4. Open your LA-3 sales data file in another Excel window.
5. Copy the sales data (data **only** – no column headers) from the data file window into the BLA LA-3 Cleaner Template window.
6. Click the Clean For Upload button in the Cleaner Template to run BLA's data checking macros.
7. Visually scan the data in the Cleaner window: fill in anything that's missing, and delete all sales of less than \$1000.
8. Log into DLS Gateway and go to the LA-3 Bulk Upload page. Select the reason for uploading: Certification, EQV or Interim Year Adjustment. (See special instructions for Interim Year Adjustment below.)
9. Copy the data only – not the headers – and paste it into the Bulk Upload window.
10. Click the Process Bulk Data button and read the completion message carefully; it will indicate the number of records uploaded successfully as well as unsuccessfully.
11. Click the Save button to save the uploaded data to Gateway.
12. If not all data loaded successfully, it can be fixed by using one or more of these methods:
 - a. Edit or delete single records using the Search/Update/Delete option
 - b. Use the Single Record Upload option to add individual sales
 - c. Fix the errors in the Excel Cleaner Template file and use the Bulk Upload option to upload all data again (it will replace all existing data)
13. When all data is completely and correctly loaded and coding and statistics are checked for accuracy, use the LA-3 Sign and Submit page to submit your data to BLA for review.

The Official Website of the Massachusetts Department of Revenue

Division of Local Services Gateway

Tracking Tax Rate District Taxrate Schedule A **LA3** Misc Forms MDM Directory Legal Other Apps Security Admin

Hide Menu LA3 Home [Printer Friendly](#) [Help](#) [My Profile](#) [Logout](#)

- LA3 Upload Program
 - Search/Update/Delete
 - Bulk Upload
 - Single Record Upload
 - Sign & Submit LA3 Data
- LA3 Certification Process
 - Quartile Report
 - Valuation Summary Sheet
 - Final Statistics Approval
- LA3 EQV Process
 - EQV Statistics Approval
 - View LA 19

Welcome to the LA3 Module

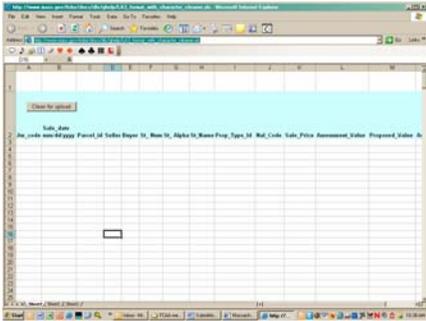
LA3 Upload Section
Allows you to search, upload, sign, and submit LA3 data.

LA3 Certification Section
Allows you to perform the final statistics approval and view summary and quartile reports.

LA3 EQV Process Section
Allows you to view EQV Statistics Approval report and LA-19.

LA3 EQV DLS Section
Allows you to perform several EQV operations.

Tips for Preparing Your Sales Data for Submission



Use BLA's Cleaner Template. It will screen out characters that won't make it past the DOR firewall, and will reformat columns of data that might be in the wrong format. To obtain a copy of the Cleaner template:

- Log into DLS Gateway
- Select the LA-3 module, then the Bulk Upload option.
- Click the link to download BLA's LA-3 format and character cleaner Excel template (if it opens automatically, save it to your computer or server.)

The BLA Cleaner template contains macros. You may need to click *Enable Macros* if your Excel security settings warn you about the file; if you do not see the blue Clean for Upload button in the template, macros may be disabled on your system and the file will not work correctly. Click Tools > Macro > Security to check your current macro security level; it must be no higher than Medium for the template to work.

Excel sometimes interprets data in a CSV file incorrectly. When you open your sales data file in Excel, does some of the data look strange? Did Excel strip off the leading zeros from the state use codes and zip codes? Do your parcel IDs appear in scientific notation? When Excel opens a text file, it takes a guess as to the type of data in each column. Sometimes it guesses correctly, and sometimes it doesn't.

- If your sales data file has a CSV extension, Excel will simply open it and you'll see the data. It will guess the data formats, and data may or may not be displayed correctly.
- If your sales data file has a TXT extension, Excel will start the Text Import Wizard, which allows greater control over how Excel imports data. *Hint: if your CAMA system produces a data file with a CSV extension, renaming it with a TXT extension will force Excel to use the Text Import Wizard.*
- To get the Text Import Wizard to run, start Excel first, then use File > Open to find your sales data file. Don't use "Open With – Excel" in Windows Explorer; make sure you're in Excel first, then open the text file.

Have both Excel files open simultaneously (BLA's cleaner template and your LA-3 sales file) so you can easily copy from one workbook and paste to the other.

To quickly select all data in your LA-3 sales data file: use Ctrl-End (press both keys together) to move the cursor to the last cell in the spreadsheet that contains data, then use Shift-Ctrl-Home (all three keys together) to return the cursor to the first cell while selecting everything in between. Your entire data range should be selected.

Ways to Copy selected data:

- Click Edit > Copy on the menu bar
- Right-click anywhere inside the highlighted data and select Copy from the pop-up menu
- Press Ctrl-C.

Ways to Paste selected data:

- Click Edit > Paste on the menu bar
- Position the cursor where the data should go, right-click, and select Paste from the pop-up menu
- Press Ctrl-V.

Remove all sales of less than \$1000. BLA does not want you to submit sales under \$1000, so screen them out of your data file prior to uploading to Gateway.

Make sure there is no missing data - you cannot have blank cells in columns C (parcel ID), D (buyer/grantee), E (seller/grantor), F (street number), K (sale price), L (current assessed value) or M (proposed assessed value.) Numeric cells (columns F,K,L and M) must contain a number equal to or greater than zero.

Your data cannot contain any of the following characters: ~ ` ^ * = { } | \ < > [] "

These characters are seen by the DOR firewall (and most other firewalls) as potentially dangerous, because they often appear in malicious code. The BLA Cleaner Template will screen out these characters automatically.

A couple of steps remain after adding any missing data and removing illegal characters:

- Modify entries in Column I, Property Type ID (state use code) so the code reflects *the use at the time of assessment*, not at the time of the sale.
- Add the Assessment/Sale Ratio (ASR) column: Under the header AS_Ratio, add the ASR formula to the first blank cell in column N, then copy it down to fill the column. The formula should be Column M (Proposed Value) divided by Column K (Sale Price.)
- Column O, Outlier, should remain blank—this column is filled by DOR.
- Column P, Time Trend, should either be completely blank or completely filled; if you are not using a time trending adjustment, leave the column blank.

Remember to click SAVE after uploading! Upload your data, then click the Save button. This step saves the data to the DLS web server, where it can be searched, viewed, edited, deleted, or replaced until you're ready to officially submit it to BLA.

Saving is not the same as submitting. Data that has been saved but not submitted is in a working state, and BLA will not consider it final until you tell them it's final. Remember to submit your data when you're ready for BLA to review it, by going to the Sign and Submit page. Check the signature box and click the Submit button when you're ready for BLA to review your sales data.

2/24/2008	009C00580000E	BOARDMAN SHAW	WEISS DANIEL S	117	EAST UNION ST	101	515,000
2/27/2008	011A001300640	HICKEY STEVEN	ELLIS BERNARD J	105	BRAEBURN LN	102	474,900
2/28/2008	017A000100060	THARP JILL A	SEHGAL MANAV	48	MOUNTAIN GATE R	102	270,000
2/28/2008	008A003500000	BRANZBURG LEWI	DESENS JONATHAN	153	PLEASANT ST	101	370,000
2/28/2008	016B00220000Z	STERNICK JEFFREY	SAIDI MASHEED H	47	RAYMOND WAY	101	505,000
2/28/2008	013A01160002S	ZHENG J & XIONG	MAGENNIS KEVIN	29	ROSSI LN	101	669,000
2/28/2008	017A000100520	GLAUSER SAMANT	DONEGAN CAROL	126	MOUNTAIN GATE R	102	279,800
3/1/2008	017A00040000D	FOUNDAS JOHN&S	FILIPPOV ALEXAND	12	SHERBORNE CIRC	101	475,000
3/1/2008	010A014000000	RAFFI ERIC	ACORRONI ALAN A	15	WILLIAMS RD	101	350,000
3/8/2008	008B013800000	FANNING CAROL J	DIAMOND JAMES A	145	CHERRY ST	101	290,000
3/9/2008	015A01300000G	DEL LA FEMINA FR	DEUTSCHE BANK F	555	CHESTNUT ST	101 L	498,435
3/9/2008	014A003002090	KING JOVAN J	SHAKER JEBA	365	CAPTAIN EAMES C	102	389,000

1 2 3 4 5 6 7

Signatures
 We are submitting Property Sales Report, LA-3, for the triennial certification of property assessments. The Board of Assessors certifies the fair cash value. The Board agrees to review and approve all valuations as reflecting full and fair cash value in all classes of property.

_____ (Date)

(Assessor) _____ (Date)

Comments:

_____ (Date)

(Assessor) _____ (Date)

Special Instructions for Interim Year Adjustment bulk uploads: Prior Year NAL and State Use Codes

The interim year adjustment upload format is ordinarily the same as the format used for Certification, i.e. the standard LA3 format noted above in Step 1. For larger communities an additional upload option exists that is described below. Note that when the upload is complete and saved, the format as seen on Gateway in the Search /Update/Delete screen now includes additional columns

- The standard LA3 file has columns for the NAL and state use code for the current year. Interim Year Adjustment adds columns for the NAL and state use codes for the previous year. For most communities, the previous NAL code is automatically filled (when Save is clicked after Bulk Upload processing) with the NAL code used for the current assessed value. This will be accurate in most cases but will need review since there may be instances where the NAL code is different from one

year to the next. An example would be a sale that should be un-coded in one year and coded P in another year. Review the file and individually edit codes as appropriate.

- But what if you have hundreds of sales and your assessment system is capable of creating a file with accurate prior year codes? You need not individually edit these after upload. When the Interim Year Adjustment process is selected for bulk upload, a checkbox entitled **Upload Prior Year Use Code and NAL Codes** appears. Checking this box tells the system you will be supplying two additional columns PRIOR YR USE CODE and PRIOR YR NAL CODE immediately after STREET NAME and before CURRENT YR USE CODE. A separate cleanup program is triggered for this file format.



St Alpha	Street Name	Prior Yr Use Code	Prior Yr NAL Code	Current Yr Use Code	Current Yr NAL Code	Sale Price
0	NORTH PLEASANT	101	N	712	V	1,168,01

- Similarly, the columns for the assessment sales ratio for the current year and for the current year based on time trended sales will be augmented by a column for the assessment sales ratio for the previous year. Please NOTE that if time trended sales are used: Statistics shown on the LA15 default to represent NON time trended sales. If you wish to view the statistics utilizing time trending you can click on the button, on the LA15, for time trended sales and a pdf file appears with those statistics.

It is important to note that the statistics for the LA15 are calculated directly from the LA3 for Interim Year data. This makes the issue of coding very important and dictates that you only *SAVE* the LA3 data and not *SUBMIT* the LA3 data until all LA3 issues are settled. After saving the LA3 you can look at the LA15 and see the resulting statistics. After all issues are resolved, the LA3 can be submitted. Once submitted, the data are locked, preventing changes. If you have submitted the LA3 but wish to make additional changes you must contact the Bureau of Local Assessment so that the LA3 can be unlocked for your revisions. This can be done via e-mail at BLADATA@DOR.STATE.MA.US or by calling (617) 626-2300.

Searching for Sales Using DLS Gateway



<https://dlsgateway.dor.state.ma.us/gateway/Public/WebForms/LA3/LA3Search.aspx>

The bottom-most link on the Gateway Login page will take you to DLS's LA3 Parcel Search feature. You do not have to be a registered Gateway user to access the LA3 Parcel Search – anyone can use it.

To search for sales using the LA3 Parcel Search feature:

- Select one or more Jurisdictions (cities/towns) from the list. Press the Ctrl key while clicking a jurisdiction name to select more than one name, then click the > button to send the name(s) to the Selected Jurisdiction(s) box. To select ALL jurisdictions, click the >> button.
- Select one or more state use codes from the Available Prop(erty) Types list using the same method described above.
- If you wish to restrict the search to only valid sales or only invalid sales, click the appropriate radio button. Both valid and invalid sales will be returned by default.
- Enter starting and ending sale dates using the format MM/DD/YYYY to search for sales occurring between two dates. *You must enter a date in **Sale Date To** if you enter a date in **Sale Date From**.*
- Enter minimum and maximum sale price to search for sales within a specific price range. *You must enter an amount in **Sale Price To** if you enter an amount in **Sale Price From**.*
- Enter a Buyer Name to find sales information relative to a specific name.
- Enter a Seller Name to find sales information relative to a specific name.
- Enter a Street Name to find sales on a specific street. All sales beginning with the name entered will be displayed; for example, if you enter "HILL" in Street Name, you will see sales on Hill Rd, Hill Ave, Hillcrest, Hillside Ave, and so on.
- 50 sales per page are displayed by default. Select 100, 200 or 300 from the list to see more sales per page. More sales per page will require significantly longer processing time.
- Sales can be sorted by any column simply by clicking a column header. The current sort order will be displayed above the data; click the Reset Sort button to remove the sort.
- Currently displayed sales can be sent to Excel by clicking the Export to Excel button at the bottom of the screen.