

Property Tax Oversight OASYS eTRIM

October 29, 2025



Agenda

Purpose of OASYS ePortal

Review of OASYS ePortal Features

Contact and Access Management Screens Demonstration

OASYS eTRIM Screens Demonstration

Training and Job Aid Resources Review

Q&A

OASYS ePortal Purpose

The Oversight and Assistance System (OASYS) ePortal is Property Tax Oversight's (PTO) online platform for digital communication with county offices:

- Property appraisers
- Tax collectors
- Taxing authorities
- Clerks of court



The ePortal serves as a single internet location where elected officials and their staff access applications and important information.



OASYS ePortal Features

Single sign on for all external PTO applications

A phased rollout will transition access to all external applications through the ePortal.

Central location for PTO communications

Messages provide a consolidated reference point for all important information.

OASYS ePortal user management

- Create users, remove users, and maintain contact information
- Elected officials are automatically granted permissions.
- Elected officials may delegate access for their office.

Application access

Application access requests from an elected official or delegate must be approved by PTO before access is granted.

OASYS ePortal Features

Log into OASYS ePortal

Check messages, notifications, important dates Access Truth in Millage application



OASYS ePortal Contact and Access Managers

Contact Manager

- An office may select one or more staff members to be the contact manager.
- Contact managers can add, remove, and modify contact information for individual users and the office. They **cannot** request access to PTO applications for users.
- Offices may grant this role to administrative assistants.

Access Manager

- An office may select one or more staff members to be the access manager.
- The access manager can perform all the tasks of the contact manager.
- Additionally, the access manager can request access to PTO applications for users and designate other contact and access managers.
- Offices may grant this role to finance directors, IT managers, and other supervisory roles.



OASYS ePortal Contact Management

Contact PTO

My Office

Kristen Vera

City of Defuniak Springs

Post Office Box 685 DeFuniak Springs, FL 32435

Office Website

Manage Office Contacts

Manage Office Access You have 2 unread messages - click to view

Your Applications

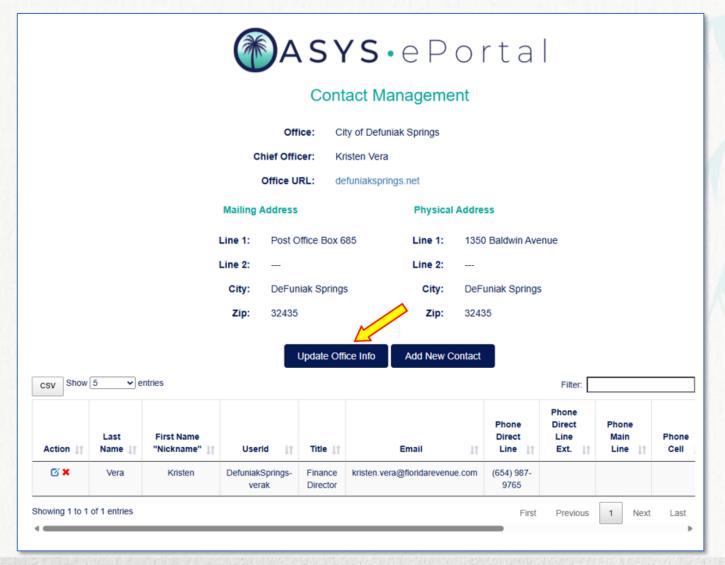
Truth in Millage

Access Management

Contact Management

To request a change to your application access, please contact Kristen Vera from your office.

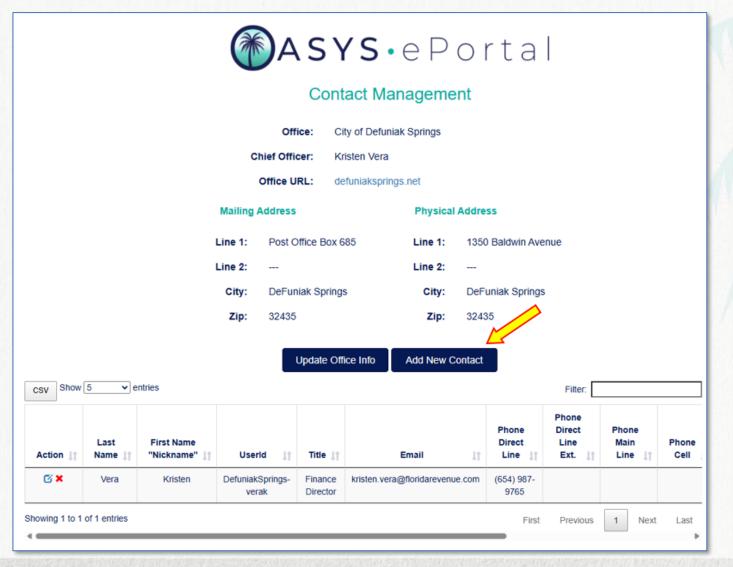
OASYS ePortal Contact Management



Update Office Information Chief Officer: Kristen Vera Office URL: defuniaksprings.net **Mailing Address** Line 1: Post Office Box 685 Line 2: City: DeFuniak Springs Zip: 32435 Physical address is the same as mailing address **Physical Address** Line 1: 1350 Baldwin Avenue Line 2: City: DeFuniak Springs Zip: 32435 Submit Cancel

Florida
DEPARTMENT OF REVENUE

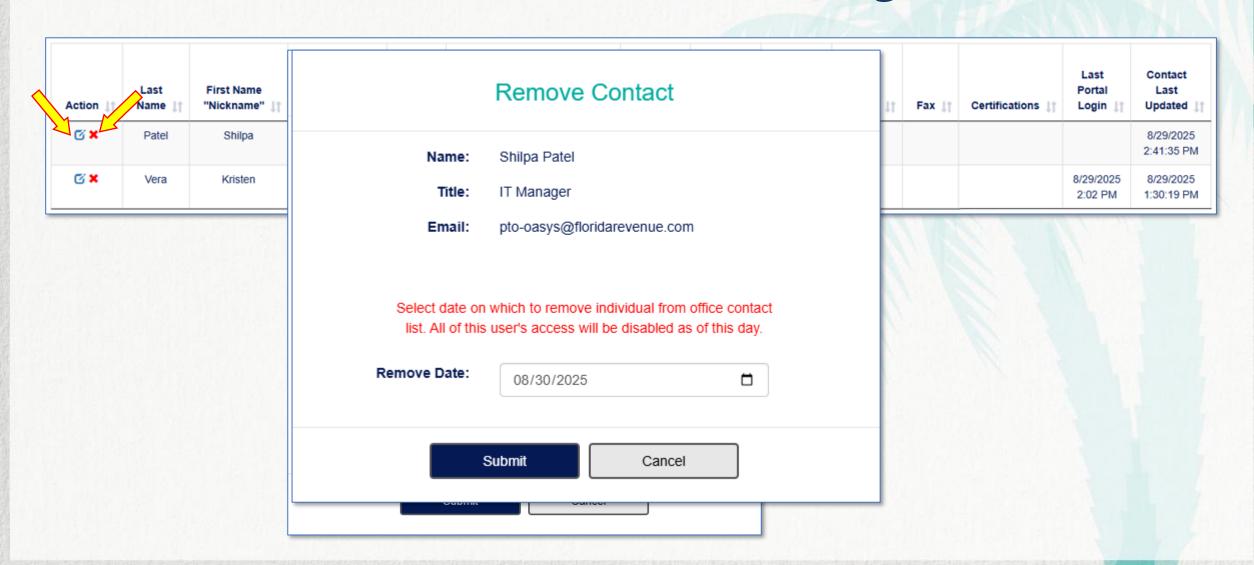
OASYS ePortal Contact Management



Add New Contact						
First Name*:	Shilpa					
Last Name*:	Patel					
Nickname:						
Title*:	IT Manager					
Email*:	pto-oasys@	floridarevenu	e.com			
Phone Direct Line*:	(850) 888-8	888	Ext:	123		
Phone Main Line:						
Phone Cell:						
Fax:						
		ast name spe e updated on				
Su	ıbmit	Cano	el			



OASYS ePortal Contact Management





OASYS ePortal Access Management



Please use Chrome as your browser to have the best experience using ePortal.

Contact PTO

You have 2 unread messages - click to view

My Office

Kristen Vera

City of Defuniak Springs

Post Office Box 685 DeFuniak Springs, FL 32435

Office Website

Manage Office Contacts

Manage Office

Your Applications

Truth in Millage

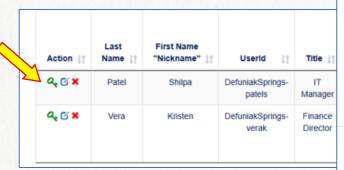
Access Management

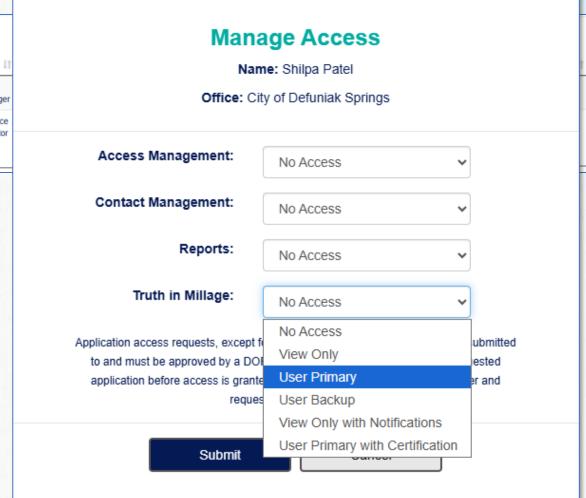
Contact Management

To request a change to your application access, please contact Kristen Vera from your office.

Florida
DEPARTMENT OF REVENUE

OASYS ePortal Access Management



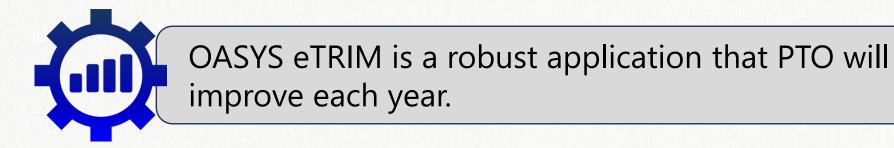


Phone Cell 🏦	Fax ↓↑	Certifications 🏥	Last Portal Login 🎼	Contact Last Updated 1
				8/29/2025 2:41:35 PM
			8/29/2025 3:06 PM	8/29/2025 1:30:19 PM

OASYS eTRIM Purpose

In 2024, PTO launched OASYS eTRIM.

- Taxing authorities can add, remove, and modify levies and Community Redevelopment Areas (CRA) within the application.
- Taxing authorities can complete TRIM forms in a more streamlined and efficient environment.
- The application offers a more automated process for submitting TRIM packages for review.



Taxing Authorities Levying Ad Valorem Taxes

Taxing Authorities by Type

Counties	67
School Districts	67
Municipalities *	393
Single County Independent Special District	112
Multi-county Independent Special District	15
Total	654

^{*} Does not include 13 cities which do not levy ad valorem taxes



OASYS eTRIM Levels of Access

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



OASYS eTRIM



Please use Chrome as your browser to have the best experience using ePortal.

Contact PTO

You have 2 unread messages - click to view

My Office

Kristen Vera

City of Defuniak Springs

Post Office Box 685 DeFuniak Springs, FL 32435

Office Website

Manage Office Contacts

Manage Office Access

Your Applications

Truth in Millage

Access Management

Contact Management

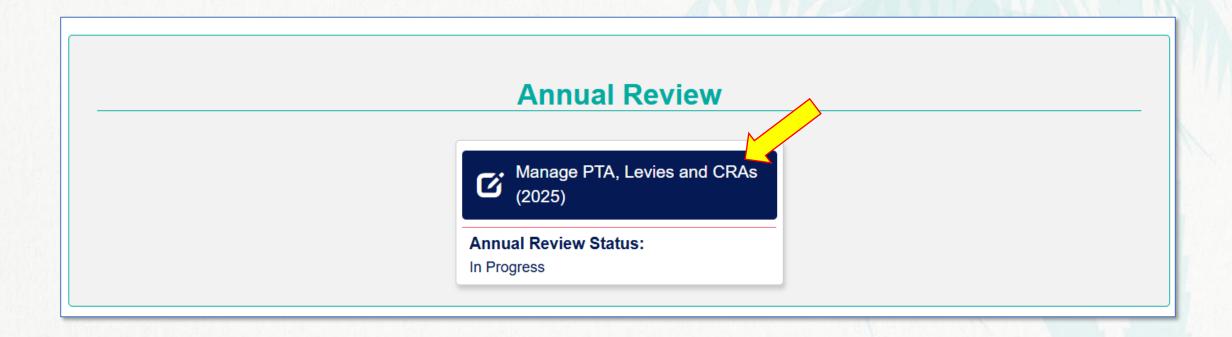
To request a change to your application access, please contact Kristen Vera from your office.

Annual Review

- Confirm operating status, voting member count, office details, and eTRIM user information
- Check existing levies and CRAs
- Add a new levy, such as a debt
- Add a new CRA
- Update a levy with an end date (final tax year)
- Upload a Certification for Taxing Authorities that Do Not Levy Ad Valorem Taxes (Form DR-421) for a Do Not Levy



Annual Review



Annual Review - Operating, Office, and TRIM Users

Office Information

TRIM Users and Access

To change email addresses, titles or phone numbers in this table, contact your contact manager.

To change role (level of access) to TRIM, contact your access manager.

User Name	Title	Email Address	Phone Number	User Role
Shilpa Patel	Tester	shilpa.patel@floridarevenue.com	(850) 545- 2200	User Primary with Certification
Kristen Vera	IT Manager	kristen.vera@floridarevenue.com	(897) 986- 5498	User Primary

Confirm

COMMINI

Annual Review – Levies Table

Levies

Create New Levy

Levy Id	Levy	Туре	Voted	Debt	Status	Start Year	End Year	Millage Cap	Principal Taxing Authority Wide	Action
421	Lake County BCC - Operating	General	NO	NO	Levying		9999	10.0000	YES	
422	Lake County BCC - Voted, Debt	General	YES	YES	Levying		9999	Enter Cap	YES	
426	Lake County Water District	Dependent Special District	NO	NO	Levying		9999	Enter Cap	YES	
1118	Stormwater	Municipal Service Taxing Unit	NO	NO	Levying		9999	Enter Cap	NO	
1119	Emergency Medical Services	Municipal Service Taxing Unit	NO	NO	Levying		9999	Enter Cap	YES	

Annual Review - CRA Table

Community Redevelopment Area (CRA)

Create New CRA

Principal Taxing Authority For:

CRA Id	CRA Name	Base Year	Related Levies	Start Year	End Year	Action
193	Mount Plymouth-Sorrento CRA	2014	Lake County BCC - Operating Lake County Water District Emergency Medical Services	2015	9999	

	Contributing Levies Only:						
CRA Id	CRA Name	Base Year	Start Year	End Year	PTA Contributing Levy	Other Contributing Levies	
172	Carver Heights CRA	2001	2002	9999	Lake County BCC - Operating Lake County Water District Emergency Medical Services	City of Leesburg - Operating (primary)	
173	Carver Heights CRA (Expansion; 2015)	2015	2016	9999	Emergency Medical Services Lake County Water District Lake County BCC - Operating	City of Leesburg - Operating (primary)	



Annual Review – Editing Levy or CRA Name

Current levy name:	County Public Transit
New levy name:	Public Transit
Attach Doc	

Current CRA Name:	Villages of Pasadena Hills	
New CRA Name:	Pasadena Hills Villages	
Attach Doc	umentation	



Annual Review – Editing Levy or CRA End Year

Current levy end year: N/A

New levy end year:

2026

Base year: 2012

Current End Year of this CRA: 9999

What is the last tax year in which this CRA will operate?

2028



Annual Review – Editing Levy Millage Cap

Current millage cap: Not Established

New millage cap:

10.0000

Annual Review – Editing Levying Status



From DNL to active levying:

Levy Status

Will ad valorem taxes be levied for the current tax year?





Annual Review – Creating a New Levy

C	reate New Levy
Principal Taxing A	authority: Saint Lucie County Board of County Commissioners
Instructions	
Fn	nter Levy Information
Levy Name:	
	Do not abbreviate levy name (Emergency Medical Services may be abbreviated as EMS).
Levy Type:	Municipal Service Taxing Unit
Is this a voted levy?:	
Is this a debt/bond levy?:	
Is this less than Principal Taxing Authority wide?:	
What will be the first levy year?:	2025 🕶
What year is this levy authorized through?:	
	If not applicable or no expiration, please enter '9999'.
Levy cap, if applicable:	



Annual Review – Creating a New CRA

Create New CRA

Primary Principal Taxing Authority: Miami-Dade Board of County Commissioners

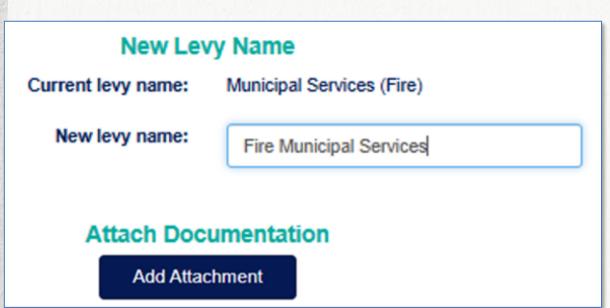
Instructions

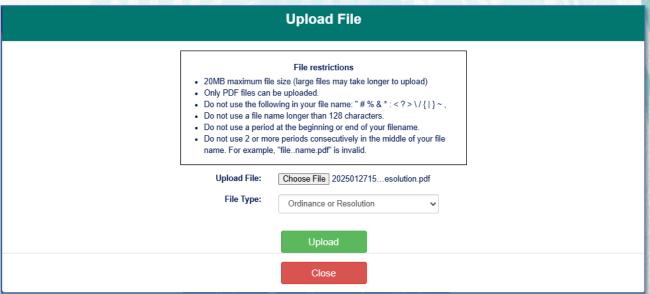
Enter Community Redevelopment Area(CRA) Information

Community Redevelopment Area (CRA) Name:	
	Do not abbreviate name even if abbreviation is in resolution
What is the base year?:	
What levies from your Principal Taxing Authority (PTA) will contribute?:	None selected →
What levies from other Principal Taxing Authorities (PTAs) will contribute?:	None selected ▼



Annual Review – Adding Attachments





		Attachments		
Attachment Type	File Name	Uploaded Date	Uploaded By	Actions
Ordinance or Resolution	20250127154552Resolution.pdf	1/27/2025 3:45:55 PM	IndianRiverHD-verak	*

Annual Review - Available Buttons

Back Save Submit Delete

Button Label	Description	Caveat	
Back	Returns user to the Annual Review dashboard.	Any unsaved input will be lost. EXCEPTION: When an attachment is uploaded, OASYS eTRIM saves the attachment and data on the input screen.	
Save	Saves the input and attachment(s) to OASYS eTRIM and user remains on the input screen. Saved input can be edited later, prior to being submitted.	Does not submit the input/update to PTO TRIM. HINT: Use the save button to protect your work.	
Submit	Saves and submits the input and attachment(s) to PTO TRIM and returns user to the Annual Review dashboard. NOTE: To submit, all input fields must be complete, and documentation must be uploaded (except for status changing from Levying to DNL).	Once submitted, the input/update cannot be edited.	
Deletes saved and unsaved input and attachments and returns user to the Annual Review dashboard.		User confirmation of this action is required. NOTE: The delete button is not available once an update has been submitted for PTO TRIM review.	



Annual Review - PTO TRIM Review Decisions

TRIM Review Decision	Taxing Authority Next Steps	Action Button on Annual Review Screen
Approval	No additional steps	None
Rejection	Taxing authority must review rejection reason and delete rejected request in OASYS eTRIM.	Delete Millage Cap Change - Rejected
Request for Additional Information	Taxing authority must provide requested information and resubmit request in OASYS eTRIM.	Update Millage Cap Change - Info Requested

Florida
DEPARTMENT OF REVENUE

Annual Review – PTA Review Complete

284	City of Boca Raton CRA	1981	1982	0000	Palm Beach BCC - Operating	City of Boca Raton - Operating (primary)
285	City of Boynton Beach CRA	1983	1984	9999	Palm Beach BCC - Operating	City of Boynton Beach - Operating (primary)
288	City of Delray Beach CRA	1984	1985	9999	Palm Beach BCC - Operating	City of Delray Beach - Operating (primary)
287	City of Jupiter CRA	2002	2003	0000	Palm Beach BCC - Operating	Town of Jupiter - Operating (primary)
288	City of Lake Worth Beach CRA	2001	2002	9999	Palm Beach BCC - Operating	City of Lake Worth Beach - Operating (primary)
290	City of Riviera Beach CRA	1983	1984	9999	Palm Beach BCC - Operating	City of Riviera Beach - Operating (primary)
291	City of West Palm Beach CRA - Downtown	1984	1985	9009	Palm Beach BCC - Operating	City of West Palm Beach - Operating (primary) West Palm Beach Downtown Development Authority - Operating

PTA Review Complete



Submitting TRIM Forms

DR-420 Series (June – August)

Certification of Taxable Value (Form DR-420)

Certification of School Taxable Value (Form DR-420S)

Tax Increment Adjustment Worksheet (Form DR-420TIF)

Certification of Voted Debt Millage (Form DR-420DEBT)

Maximum Millage Levy Calculation Preliminary Disclosure (Form DR-420MMP) DR-422 Series (September –

November)

Certification of Final Taxable Value (Form DR-422)

Certification of Final Voted Debt Millage (Form DR-422DEBT)

Form DR-421 (January – November)

Certification for Taxing Authorities that Do Not Levy Ad Valorem Taxes (Form DR-421) DR-487 Series (September –

December)

Certification of Compliance (Form DR-487)

Vote Record for Final Adoption of Millage Levy (Form DR-487V)

Maximum Millage Levy Calculation Final Disclosure (Form DR-420MM)



Principal Taxing Authority Dashboard

TRIM Forms



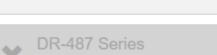
DR-421 Series Status:

Not Assigned



DR-420 Series Status:

DR-420 Series - Assigned (Principal Taxing Authority)



DR-487 Series Status:

Not Assigned



DR-422 Series Status:

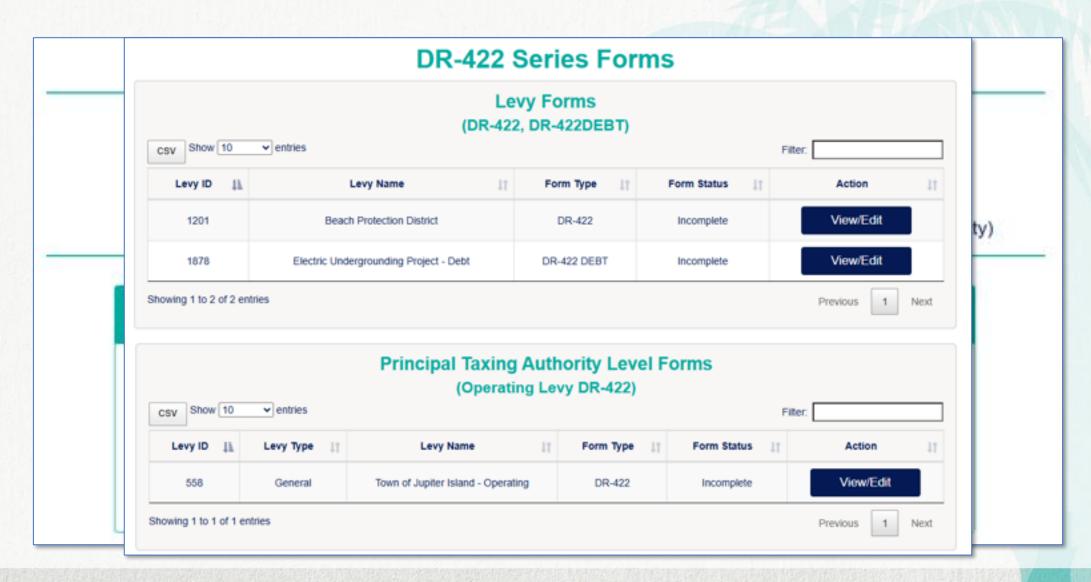
DR-422 Series - Assigned (Property Appraiser)



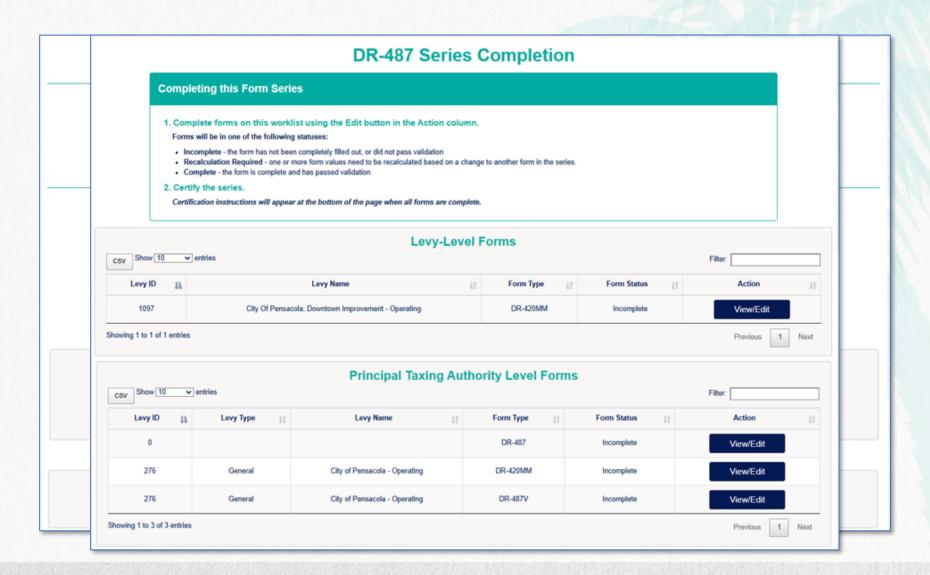
DR-420 Series Worklist



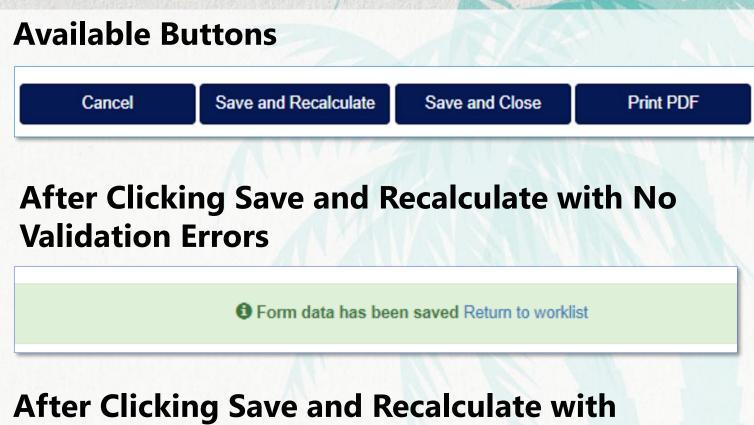
DR-422 Series Worklist



DR-487 Series Worklist

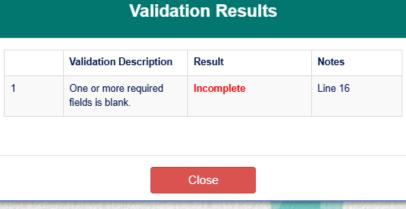


Form Screen **Functionality**



Validation Errors

1 Form did not pass all validation. Click here for additional information.





Tax Increment Adjustment Worksheet (Form DR-420TIF)

	Section II						
	Completed by Principal Taxing Authority						
6.	If the amount to be paid to the redevelopment trust fund IS BASED on a specific proportion of the tax increment value:						
6a.	Enter the proportion on which the payment is based:	% 95.00					
6b.	Dedicated increment value: (If value is zero or less than zero, then enter zero on Line 6b)	\$ 389,014,959 (Line 3 multiplied by the percentage on Line 6a)					
6c.	Amount of payment to redevelopment trust fund in prior year:	\$ 2,587,517					
7.	If the amount to be paid to the redevelopment trust fund IS NOT BASED on a specific proportion of the tax increment value:						
7a.	Amount of payment to redevelopment trust fund in prior year:	\$					
7b.	Prior year operating millage levy: (Form DR-420, Line 10)						
7c.	Taxes levied on prior year tax increment value:	\$ (Line 5 multiplied by Line 7b, divided by 1,000)					
7d.	Prior year payment as proportion of taxes levied on increment value:	% (Line 7a divided by Line 7c, multiplied by 100)					
7e.	Dedicated increment value: (If value is zero or less than zero, then enter zero on Line 7e)	(Line 3 multiplied by the percentage on Line 7d)					

Line		Control British			
Number	Form Detail	System Details			
	Line 6: If the amount to be paid to the redevelopment trust fund IS BASED on a specific				
proportion of the tax increment value					
6a	Enter the proportion on which the payment	User entry*			
Va	is based	Example for 75%, enter 75			
C.L.	Dadianta dia anana anti-alia	System-calculated			
6b	Dedicated increment value	Multiplies Line 3 by Line 6a			
C-	Amount of payment to redevelopment trust	H*			
6c	fund in prior year	User entry*			
Line 7: If t	the amount to be paid to the redevelopment tru	ust fund IS NOT BASED on a			
specific p	roportion of the tax increment value				
	Amount of payment to redevelopment trust	H*			
7a	fund in prior year	User entry*			
71.	Dei anno anno anno anno anno anno anno ann	System-populated			
7b	Prior year operating millage levy	From Line 10 of Form DR-420			
	Township to the control of the contr	System-calculated			
7c	Taxes levied on prior year tax increment	Multiplies Line 5 by Line 7b, then			
	value	divides the product by 1,000			
		System-calculated			
7d	Prior year payment as proportion of taxes	Divides Line 7a by Line 7c, then			
	levied on increment value	multiplies the product by 100			
_	B. B. A. L.	System-calculated			
7e	Dedicated increment value	Multiplies Line 3 by Line 7d			

^{*}Data can be entered for line 6 (6a and 6c) or line 7 (7a), not both. A validation error occurs if values are input in both.



Certification of Voted Debt Millage (Form DR-420DEBT)

F				
		Section II		
		Completed by Principal Taxing Authority		
	5.	Current year proposed voted debt millage rate:	0.0891	
	6.	Current year proposed millage voted for 2 years or less under s. 9(b) Article VII, State Constitution:	0.0000	

Line Number	Cours Dotail	System Details
Number	Form Detail	System Details
5	Current year proposed voted debt millage rate	User entry
6	Current year proposed millage voted for 2 years or less under s. 9(b) Article VII, State Constitution	User entry

Certification of Taxable Value (Form DR-420)

Line Number	Form Detail System Details				
10	Prior year operating millage levy	System-populated, editable From Line 4 (or 6 or 8) of prior year's DR-422			
11	Prior year ad valorem proceeds	System-calculated Multiplies Line 7 by Line 10			
12	Amount, if any, paid or applied in prior year as a consequence of an obligation measured by a dedicated increment value	System-calculated Sums Line 6c and Line 7a from all DR-420TIF forms*			
13	Adjusted prior year ad valorem proceeds	System-calculated Subtracts Line 12 from Line 11			
14	Dedicated increment value, if any	System-calculated Sums Line 6b and Line 7e from all DR-420TIF forms*			
15	Adjusted current year taxable value	System-calculated Subtracts Line 14 from Line 6			
16	Current year rolled-back rate	System-calculated Divides Line 13 by Line 15			
17	Current year proposed operating millage rate	User entry			
Total taxes to be levied at proposed millage rate		System-calculated Multiplies Line 17 by Line 4, then divides the product by 1,000			

Certification of Taxable Value (Form DR-420)

	Section II		
	Completed by Principal Taxing Authority		
10.	Prior year operating millage levy: (If prior year millage was adjusted then use adjusted millage from Form DR-422.)		5.2188
11.	Prior year ad valorem proceeds:	\$	155,359,921
			(Line 7 multiplied by Line 10, divided by 1,000)
12.	Amount, if any, paid or applied in prior year because of an obligation measured by a dedicated increment value:	\$	3,725,680
			(Sum of either Line 6c or Line 7a for all DR-420TIF forms)
13.	Adjusted prior year ad valorem proceeds:	s	151,634,241
			(Line 11 minus Line 12)
14.	Dedicated increment value, if any:	\$	772,583,980
			(Sum of either Line 6b or Line 7e for all DR-420TIF forms)
15.	Adjusted current year taxable value:	\$	29,448,421,256
			(Line 6 minus Line 14)
16.	Current year rolled-back rate:		5.1491
			(Line 13 divided by Line 15, multiplied by 1,000)
17.	Current year proposed operating millage rate:		5.2188
18.	Total taxes to be levied at proposed millage rate:		166,858,243
			(Line 17 multiplied by Line 4, divided by 1,000)
	Questions 19-21 do not appear in TRIM.		

Form DR-420 Additional Fields for Operating Levy

Line Number	Form Detail	System Details
22 of the principal authority, all dependent special districts, and MSTUs levying a millage for State 23 Current year aggregate rolled-back rate		System-calculated Sums Line 13 from all DR-420 forms*
		System-calculated Divides Line 22 by Line 15, then multiplies the product by 1,000
24	Current year aggregate rolled-back taxes	System-calculated Multiplies Line 4 by Line 23, then divides the product by 1,000
25	Total of all operating ad valorem taxes proposed to be levied by the principal taxing authority, all dependent districts, and MSTUs, if any	System-calculated Sums Line 18 from all DR-420 forms*
26	Current year proposed aggregate millage rate	System-calculated Divides Line 25 by Line 4, then multiplies the product by 1,000
Current year proposed rate as a percent change of rolled-back rate		System-calculated Divides Line 26 by Line 23, subtracts 1, then multiplies the product by 1,000 20 forms are completed.

This field will not calculate properly until all associated DR-420 forms are completed.



Form DR-420 Additional Fields for Operating Levy

22.	Total adjusted prior year ad valorem proceeds of the principal taxing authority, all dependent special districts, and MSTUs levying a millage:	s	151,634,241 (The sum of Line 13 from all DR-420 forms.)
23.	Current year aggregate rolled-back rate:		5.1491 (Line 22 divided by Line 15, multiplied by 1,000.)
24.	Current year aggregate rolled-back taxes:	\$	164,629,758 (Line 4 multiplied by Line 23, divided by 1,000.)
25.	Total of all operating ad valorem taxes proposed to be levied by the principal taxing authority, all dependent districts, and MSTUs, if any:	\$	166,858,243 (Total of Line 18 from all DR- 420 forms.)
26.	Current year proposed aggregate millage rate:		5.2188 (Line 25 divided by Line 4, multiplied by 1,000.)
27.	Current year proposed rate as a percent change of rolled-back rate:	%[1.35 (Line 26 divided by Line 23, minus 1, multiplied by 100.)

First Public Budget Hearing			
Hearing Date and Time:	09/25/2025 05:05 PM		
Timezone:	Eastern		
Street Address:	1015 Cultural Park Boulevard		
City:	Cape Coral		
Zip:	33990		

Certification of School Taxable Value (Form DR-420S) Field Information

Line Number	Form Detail	System Details
9	Prior year state law millage levy: Required Local Effort (RLE)	System-populated, editable From Line 4 (or 6 or 8) of prior year's DR-422
10	Prior year local board millage levy	System-populated, editable From Line 4 of prior year's DR- 422
11	Prior year state law proceeds	System-calculated Multiplies Line 9 by Line 7, then divides the product by 1,000
12	Prior year local board proceeds	System-calculated Multiplies Line 10 by Line 7, then divides the product by 1,000
13	Prior year total state law and local board proceeds	System-calculated Sums Line 11 and Line 12
14	Current year state law rolled-back rate	System-calculated Divides Line 11 by Line 6, then multiplies the product by 1,000
15	Current year local board rolled-back rate	System-calculated Divides Line 12 by Line 6, then multiplies the product by 1,000
16	Current year proposed state law millage rate	User entry
17A	Capital Outlay	User entry
17B	Discretionary Operating	User entry
17C	Discretionary Capital Improvement	User entry

Line Number	Form Detail System Details				
17D	[Inactive field] Use only with instructions from the Department of Revenue	Locked			
17E	Additional Voted Millage	User entry			
17	Current year proposed local board millage rate	System-calculated Sums Lines 17A, B, C, and E			
18	Current year state law proceeds	System-calculated Multiplies Line 16 by Line 4, then divides the product by 1,000			
19	Current year local board proceeds	System-calculated Multiplies Line 17 by Line 4, then divides the product by 1,000			
20	Current year total state law and local board proceeds	System-calculated Sums Lines 18 and 19			
21	Current year proposed state law rate as percent change of state law rolled-back rate	System-calculated Divides Line 16 by Line 14, subtracts 1, then multiplies the product by 100			
22	Current year total proposed rate as a percent change of rolled-back rate	System-calculated Divides the sum of Line 16 and Line 17 by the sum of Line 14 and Line 15, subtracts 1, then multiplies the product by 100			

Form DR-420S Screen

		16. Current year proposed state law millage rate:		3.0030 (Sum of RLE and prior period funding adjustment)		
		Final Public Budget Hearing				
		Hearing Date and Time:	09/0	9/2025 05:30 PM	Ö	
		Timezone:	EST		~	
		Street Address:	620 E	E University Ave		
		City:	Gain	esville		
		Zip:	3260	1		
				(Line 17 multiplied by Line 4,		Г
	40			divided by 1,000)	0.000	ı
	13.	20. Current year total state law and local board proceeds:	s	179,630,384	.8,262 s Line 12)	ı
				(Line 18 plus Line 19)		ı
	14.				.8629	ı
	14.	21. Current year proposed state law rate as percent change of state law rolled-back rate:	4.89		by Line 6,	ı
				(Line 16 divided by Line 14, minus 1, multiplied by 100)	by 1,000)	
	15. Current Year total proposed rate as a percent change of rolled-back rate:			5.07	.0862	
				(Line 16 plus Line 17), divided by (Line 14 plus Line 15), minus 1, multiplied by 100)	by Line 6, by 1,000)	

Maximum Millage Levy Calculation, Preliminary Disclosure (Form DR-420MMP) Fields

12		Lin	Line Number	Form Detail	System Details		
Line		Num		Minimum vote required to levy proposed millage rate			
Number	Form De	5		Select Majority vote of the governing body if Line 15 is less than or equal to Line 13			
Mullibel	FOITH DE			(the maximum millage rate is equal to the majority vote		-	
	Is your t	6		maximum rate).	User entry	livides	
	•		16	Select Two-thirds vote of the governing body if Line 15 is less than or equal to Line 14, but greater than Line 13 (the maximum	Select one of four		
1	indepen	7		millage rate is equal to the proposed rate).	choices based on the criteria shown		o, defaults to
		'		Select Unanimous vote of the governing body or ¾ vote if nine	Criteria Silowii		
	valorem	8		members or more if Line 15 is greater than Line 14 (the maximum millage rate is equal to the proposed rate).			
				Otherwise, select Referendum (the maximum millage rate is			ted
2	Current	9		equal to the proposed rate).			cu
-	Current				User entry If Majority vote of the		Form DR-420
		10			governing body was	tiplies	
	ъ.		17	The selection on Line 16 allows a maximum millage rate of	selected on Line 16,		ed, editable
2	Prior yea	1			enter the value from Line 13. Otherwise,	is not	- Cormo
3	vote				enter the value from		Form
	vote				Line 15.		
		12	18	Current year gross taxable value	System-populated From Line 4 of Form	nic	
					DR-420		ted
4	Prior yea	13			System-calculated		
	,	1,	19	Current year proposed taxes	Multiplies Line 15 by Line 18, then divides		Form DR-420
If I : A :-		14			the product by 1,000		da mat ample:
If Line 4 is	equal to	15			System-calculated		do not apply
and are lo	cked by t		20	Total taxes levied at the maximum millage rate	Multiplies Line 17 by Line 18, then divides		
and are 10	cked by t	If data				16.	
					•		

Form DR-420MMP Screen

	Total Maximum Taxes (Principal Authorities)	
23.	Taxes at the maximum millage of all dependent special districts and MSTUs levying a millage:	\$ 0
		(Sum of Lines 20 from Form DR-420MM-P for each district levying a millage.)
24.	Total taxes at maximum millage rate:	\$ 333,098
		(Line 20 plus Line 23)
	Total Maximum Versus Total Taxes Levied (Principal Authorities)	
25.	Are total current year proposed taxes equal to or less than the total taxes at the maximum millage rate?	Yes No
		(Line 17 multiplied by Line 18, divided by 1,000)
21.	Current year proposed taxes of all dependent special districts and MSTUs levying a millage:	\$ 0
		(Sum of Lines 19 from Form DR-420MMP for each district levying a millage.)
22.	Total current year proposed taxes:	\$ 262,392
		(Line 19 plus Line 21)



Certification of Final Taxable Value (Form DR-422)

Non-School Taxing Authority Line 4

	Section II	
	Completed by Principal Taxing Authority	
If this	e rate adopted by resolution or ordinance at final budget hearing under s. 200.065(2)(d), F.S. portion of the form is not completed in full, your taxing authority will be denied TRIM certification an rivilege for the tax year.	d possibly lose its millage
4.	Non-Voted Operating Millage Rate (from Resolution or Ordinance) (Appears as questions 4a - 4d or 4f on printed DR-422 form.)	3.0000

School Taxing Authority Line 4

	Section II	
	Completed by Principal Taxing Authority	
lillage	rate adopted by resolution or ordinance at final budget hearing under s. 200.065(2)(d), F.S.	
this pear.	portion of the form is not completed in full, your taxing authority will be denied TRIM certification and possibly lose its milla	ge levy privilege for the tax
	Non-Voted Operating Millage Rate (from Resolution or Ordinance)	
	(Appears as question 4e on printed DR-422 form.)	
	Required Local Effort	3.0950
	Capital Outlay	1.5000
	Discretionary Operating	0.7480
	Discretionary Capital Improvement	0.0000
		(Use only with directions from the Department of Revenue.)
	Additional Voted Millage	0.0000

Line		
Number	Form Detail	System Details
	is portion of the form is not completed in full, the taxing a n and possibly lose its millage levy privilege for the tax year	•
	Non-Voted Operating Millage Rate (from Resolution or Ordinance)	User entry
	Required Local Effort For School Districts Only	User entry
4	Capital Outlay For School Districts Only	User entry
4	Discretionary Operating For School Districts Only	User entry
	Discretionary Capital Improvement For School Districts Only	User entry
	Additional Voted Millage For School Districts Only	User entry

SE	CTION II: COMPLETED BY TAXING AUTHORITY		
	MILLAGE RATE ADOPTED BY RESOLUTION OR ORDINANCE AT FINAL BUDGET HEARIN	G UNDER s. 200.065(2)(d), F	.S.
	is portion of the form is not completed in full your taxing authority will be denied TRIM certifi privilege for the tax year. If any line is inapplicable, enter N/A or -0	cation and possibly lose its mill	lage
	Non-Voted Operating Millage Rate (from resolution or ordin	ance)	
4a.	County or municipal principal taxing authority	per \$1,000	(4a)
4b.	Dependent special district	per \$1,000	(4b)
4c.	Municipal service taxing unit (MSTU)	per \$1,000	(4c)
4d.	Independent Special District	per \$1,000	(4d)
4e.	School district Required Local Effort	per \$1,000	(4e)
	Capital Outlay	per \$1,000	
	Discretionary Operating	per \$1,000	
	Discretionary Capital Improvement	per \$1,000	
	Additional Voted Millage	per \$1,000	
4f.	Water management district District Levy	per \$1,000	(4f)
	Basin	per \$1,000	



Form DR-422 – Rate Adjustment

	Non-Voted Millage Rate Adjustment			
MST	ties, Municipalities, Schools, and Water Management Districts may adjust the non-voted millage rate only if the percentage on Line 3 is greater than plus or minus 1% (s. 200.065(6), its, Dependent Special Districts, and Independent Special Districts may adjust the non-voted millage rate only if the percentage on Line 3 is greater than plus or minus 3% (s. 200.065), it percentage of change in taxable value does not fall within these percentages, this section of the form will be disabled.			
Are y	rou going to adjust adopted millage?	O Yes	•	No
5.	Unadjusted gross ad valorem proceeds:	\$ (Line 1 multip	plied by Li vided by 1	
6.	Adjusted millage rate:	(Line 5 div	rided by Li plied by 1	

- On Form DR-422, line 5 applies to a county, municipality, school, or water management district and line 7 applies to an MSTU, dependent special district, or an independent special district.
- ** On Form DR-422, line 6 applies to a county, municipality, school or water management district and line 8 applies to an MSTU, dependent special district, or an independent special district.

Line		
Number	Form Detail	System Details
	Are you going to adjust adopted millage? System auto-populates No if percentage change in taxable value does not fall within parameters.	User entry (if applicable) Select Yes or No
	NOTE: If the percentage change in taxable value does not this section of the form will be disabled:	ot fall within these parameters,
none	 Counties, municipalities, schools, and water manage non-voted millage rate only if the percentage on Li minus 1 percent (s. 200.065(6), F.S.). MSTUs, dependent special districts, and independent the non-voted millage rate only if the percentage on Li minus 3 percent (s. 200.065(6), F.S.). 	ne 3 is greater than plus or ent special districts may adjust
5 or 7 *	Unadjusted gross ad valorem proceeds Does not apply if No is selected for adjusting adopted millage	System-calculated Multiplies Line 1 by Line 4, then divides by 1,000
6 or 8 **	Adjusted millage rate Does not apply if No is selected for adjusting adopted millage	System-calculated Divides Line 5 or 7* by Line 2, then multiples by 1,000



Certification of Final Voted Debt Millage (Form DR-422DEBT)

	Section II	
	Completed by Principal Taxing Authority	
If this po	rtion of the form is not completed in full your taxing authority will be denied TRIM certification and possibly lose its millage levy privilege for the tax year.	
Voted d	ebt service millage adopted by resolution or ordinance at final budget hearing under s. 200.065(2)(d), F.S.	
4a.	Voted debt service millage:	0.0451
4b.	Other voted millage: (In excess of the millage cap and not more than two years.)	0.0000
F.S).	b, Municipalities, Schools, and Water Management Districts may adjust the voted debt millage rate only if the percentage on Line 3 is greater than plus Dependent Special Districts, and Independent Special Districts may adjust the voted debt millage rate only if the percentage on Line 3 is greater than plus	
If the pe	rcentage of change in taxable value does not fall within these percentages, this section of the form will be disabled.	
Are you	going to adjust the Voted Debt Service Millage?	O Yes No
5.	Unadjusted gross ad valorem proceeds:	(Line 1 multiplied by Line 4a or 4b, as applicable, divided by 1,000)
6.	Adjusted millage rate:	(Line 5 divided by Line 2, multiplied by 1,000)

- * On Form DR-422DEBT, line 5 applies to a county, municipality, school, or water management district and line 7 applies to an MSTU, dependent special district, or an independent special district.
- ** On Form DR-422DEBT, line 6 applies to a county, municipality, school, or water management district and line 8 applies to an MSTU, dependent special district, or an independent special district.

Line	"	
Number	Form Detail	System Details
	is portion of the form is not completed in full, the taxin In and possibly lose its millage levy privilege for the tax	
certification	Tand possibly lose its militage levy privilege for the tax	User entry
4a	Voted debt service millage	User must enter 0 if Line
4 a	voted debt service militage	4b is greater than 0
	Otherwooderd well and	User entry
4b	Other voted millage (In excess of the millage cap and not more than	User must enter 0 if Line
40	two years.)	4a is greater than 0
		User entry
	Are you going to adjust adopted millage?	Select Yes or No
	NOTE: If the percentage change in taxable value doe	
	parameters, this section of the form will be disabled	
none	 Counties, municipalities, schools, and water method the voted millage rate only if the percentage on I minus 1 percent (s. 200.065(6), F.S.). 	
	 MSTUs, dependent special districts, and independent adjust the voted millage rate only if the percentage on Line 3 percent (s. 200.065(6), F.S.). 	
5 or 7 *	Unadjusted gross ad valorem proceeds Does not apply if No is selected for adjusting adopted millage	System-calculated Multiplies Line 1 by Line 4a or 4b, then divides by 1,000
6 or 8 **	Adjusted millage rate Does not apply if No is selected for adjusting adopted millage	System-calculated Divides Line 5 or 7* by Line 2, then multiples by 1,000

DR-487 Series Worklist - Determine Voting Method

DR-487 Series - Principal Taxing Authority Worklist

Tax Year: 2025

County: 27 - Escambia

Principal Taxing Authority: 218 - City of Pensacola

Principal Taxing Authority Type: Taxing Authority - Municipality

Series Status: DR-487 Series - Assigned (Principal Taxing Authority)

Combined or Single Votes Taken

Enter whether a combined vote for all levies or a vote for each levy was taken, then click "Update."

Changing the response to this question will change the number of DR-487V forms that appear on this worklist.

Changing the response to this question will reset votes entered on DR-487V forms.

Combined or Single Votes

How were votes taken?

- One combined vote was taken for all levies
- O Individual votes were taken for each levy

Update



DR-487 Series Worklist – Indicate Voting Members

		Votin	ng Members			
		7 Total Seats / 5 Add Voting M	Seats Pending Ass	ignment		
	First Name	Last Name	Title	Ac	tion	
	Kristen	Vera	Chair	Edit	Delete	
		Vacant	Vacant Board Seat	Edit	Delete	
Vera				Add V	acancy	С
Chair	Add Voting Membe	er				
		Clos	se			



Form DR-487V

	Vote Type:						
M	Itiple Votes Taken						
7 Total Seats / All Seats Assigned							
Kristen Vera - Chair	•	Yes	0	No	0	Not Present/Not Voting	
Vacant - Vacant Board Seat						Vacant	
Shilpa Patel - Vice Chair	•	Yes	0	No	0	Not Present/Not Voting	
Lizette Kelly - Board Member	•	Yes	0	No	0	Not Present/Not Voting	
Allison Kever - Board Member	•	Yes	0	No	0	Not Present/Not Voting	
Brendan Savage - Board Member	•	Yes	0	No	0	Not Present/Not Voting	
Harvey Bissoo - Board Member	0	Yes	0	No	•	Not Present/Not Voting	
	Vote Totals:						
Yes							5
No							0
Not Present/Not Voting							2
						Not Presen	t: 1



Maximum Millage Levy Calculation, Final Disclosure (Form DR-420MM) Fields

			Line			1 / A / A / A	
1!		Line Number	Number	Form Detail	System Details		
Line Number	Fo	5		 Minimum vote required to levy adopted millage rate Select Majority vote of the governing body if Line 15 is less than or equal to Line 13 (the maximum millage rate is equal to the majority vote maximum rate). Select Two-thirds vote of the governing body if Line 15 is less than or equal to Line 14, but greater than Line 13 (the maximum millage rate is equal to the adopted rate). Select Unanimous vote of the governing body or % vote if nine members or more if Line 15 is greater than Line 14 (the maximum millage rate is equal to the adopted rate). 	User entry Select one of four choices based on the criteria shown	DR-420	
1	ls y	6				Line 5, then by 1,000	
	inc	7				n DR-420	, defaults to
	val	8				n Line 6	
2	Cu	9		 Otherwise, select Referendum (the maximum millage rate is equal to the adopted rate). 		n DR-420	ed
	Cu	10	17	The selection on Line 16 allows a maximum millage rate of	User entry If Majority vote of the governing	vote of e 9, then	Form DR-420
3	Pri	11			body was selected on Line 16, enter the value from Line 13.	2 /if Lina 10 is	ed, editable <i>Form</i>
	ma	12			Otherwise, enter the value from Line 15.	ice of Economic esearch	
4	Pri	13	18	Current year gross taxable value	System-populated From Line 4 of Form DR-420	Line 12	ed 5 DR 430
		14	19	Current year adopted taxes	System-calculated Multiplies Line 15	1.10	Form DR-420
If Line 4 is	_	15			by Line 18, then divides the		o not apply
and are loo	cked	If data is entered	20	Total taxes levied at the maximum millage rate	product by 1,000 System-calculated Multiplies Line 17 by Line 18, then divides the	Line 16.	

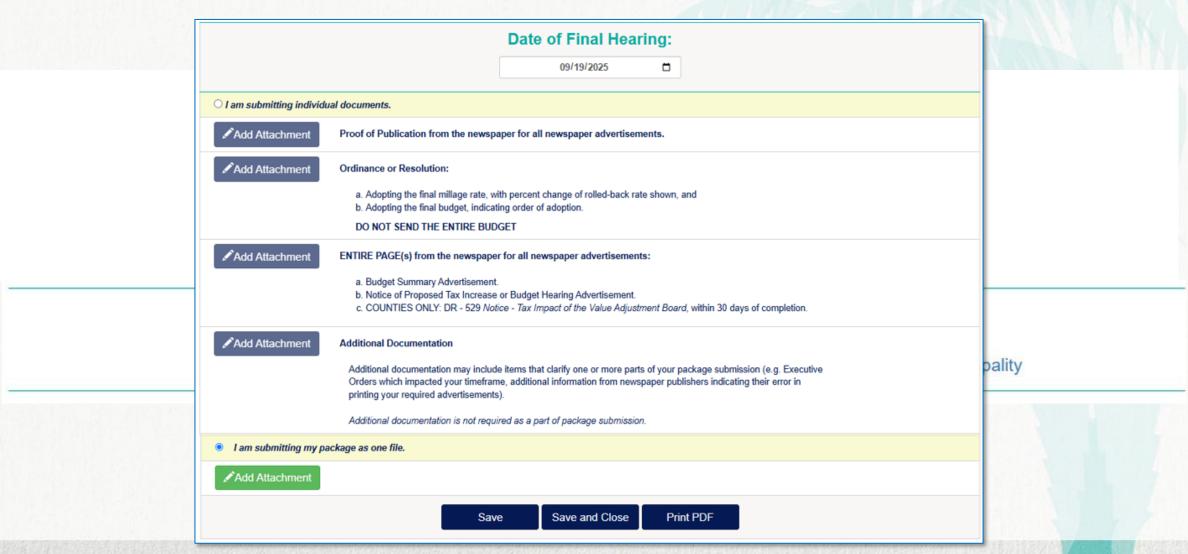


Form DR-420MM Screen

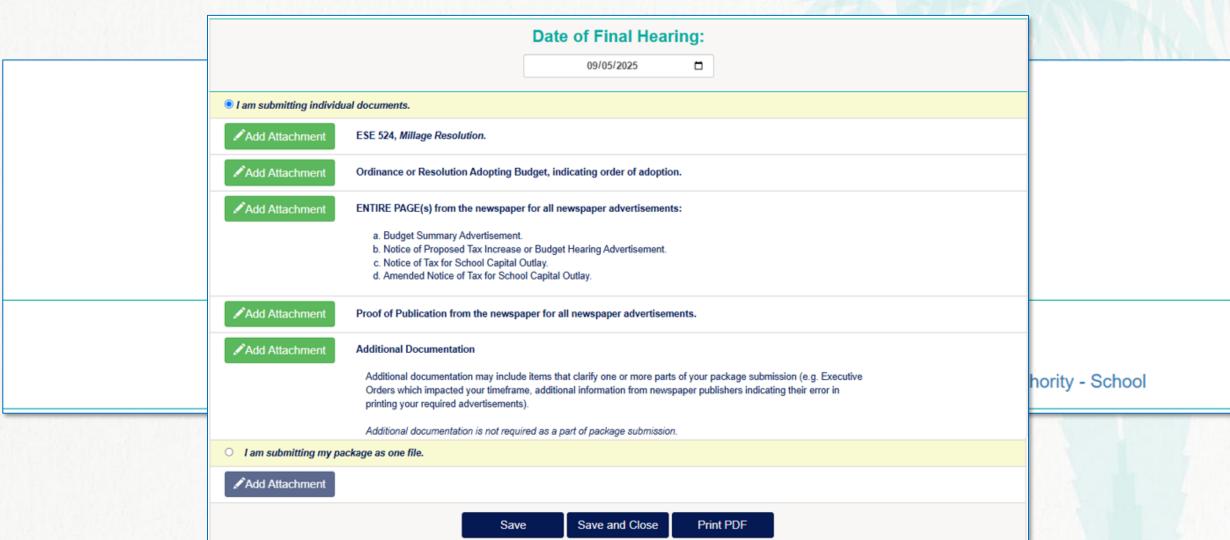
1.	Is your principal taxing authority a municipality or independent special district that has levied ad valorem taxes for less than 5 years?	○ Yes ● No
	Inswered "Yes" to this question, the levy is not subject to a millage limitation. Itional entry is required. Save and Return to DR-487 Series Worklist.	
2.	Current year rolled-back rate:	4.0493 (Current Year Form DR-420,
3.	Prior year maximum millage rate with a majority vote:	11.6071
4.	Prior year operating millage rate:	(Prior Year Form DR-420MM, Line 13)
		(Current Year Form DR-420, Line 10)
	4 is equal to or greater than Line 3, no values will populate in lines 5-10. Continue at line 11. 4 is less than Line 3, continue to Line 5.	
		(Sum of Lines 19 from Form DR-420MM for each district levying a millage.)
22.	Total current year Adopted taxes:	29,381,541 (Line 19 plus Line 21)

Florida
DEPARTMENT OF REVENUE

Non-School Taxing Authority, *Certification of Compliance* (Form DR-487)



School District, Form DR-487





Certifying Form Series

Example when Form Series Not Ready for Certification

DR-420 Series - Section II 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.

Examples when Form Series Ready for Certification

DR-422 Series - Section II Ready to Certify

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

After certification, your forms will be available to the property appraiser for acceptance.

DR-422 Series - Section II Ready to Certify

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

After certification, you<u>r forms will be available to the property appraiser for acceptance.</u>

Certify DR-422 Series - Section II

Example after Form Series Certification

DR-487 Series - Certified

This form series has been certified as follows:

This form series was first certified on 9/5/2025 1:39:16 PM by ECPS-verak



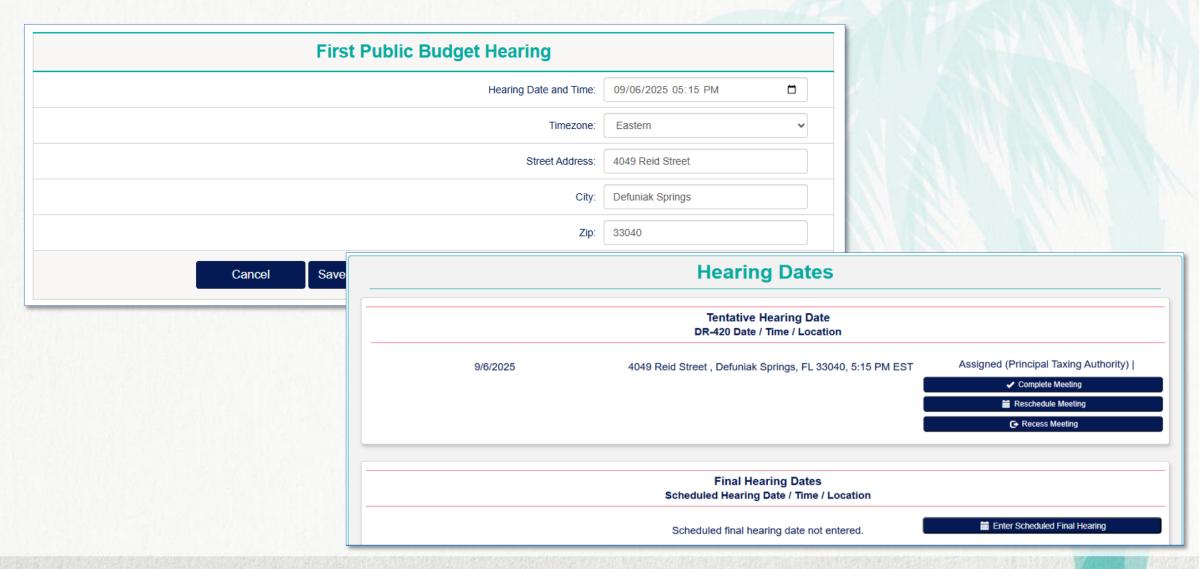
Hearing Date Module

In September 2025, PTO added the **Hearing Date Module** to taxing authority dashboards in OASYS eTRIM.

- Taxing authorities can enter and manage information about both tentative and final public budget hearings.
- Taxing authorities can confirm hearing completion or indicate meeting rescheduling or recession.
- This feature helps the Department of Revenue (Department) track scheduled hearing dates should an emergency such as a natural disaster arise.



Hearing Date Module – Tentative Hearing Date





Hearing Date Module – Complete Meeting





Hearing Date Module – Reschedule Meeting





Hearing Date Module – Recess Meeting



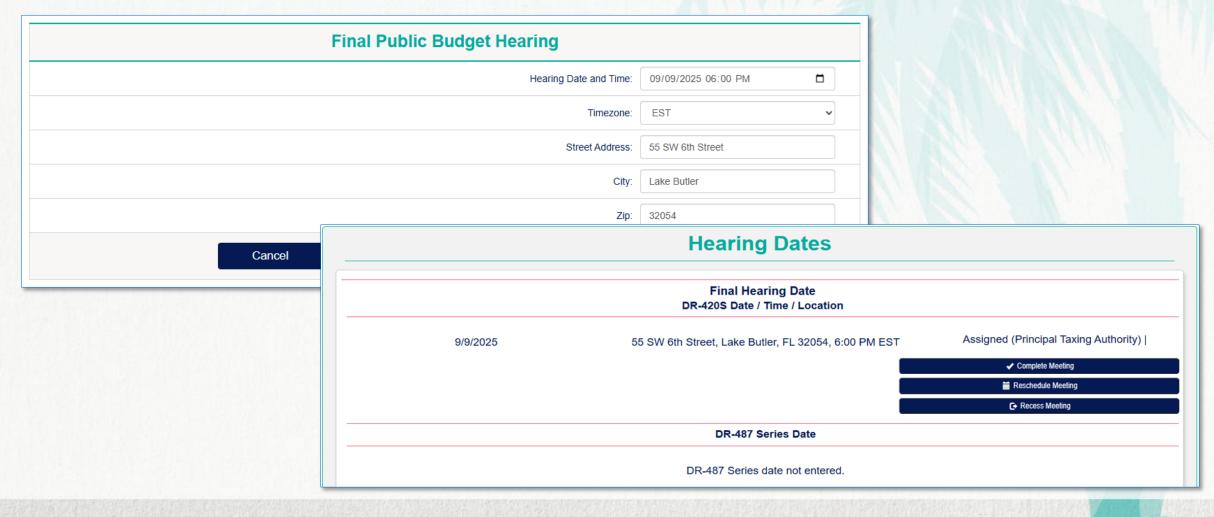


Hearing Date Module – Non-School Enters Final Hearing





Hearing Date Module – School Final Public Budget Hearing





Additional Resources

Locate additional OASYS ePortal training modules <u>here</u>.

OASYS ePortal and OASYS eTRIM user guides are in the **Resources** tab in OASYS eTRIM and on the Department <u>website</u>.



Contact Information

OASYS Technical Questions

Kristen Vera

Kristen.vera@floridarevenue.com (850) 617-8898

Shilpa Patel

Shilpa.patel@floridarevenue.com (850) 617-8386

TRIM Process Questions

Dametria Hayward-Williams

<u>Dametria.hayward-williams@floridarevenue.com</u>

(850) 617-8922

Wyatt Peters

Wyatt.peters@floridarevenue.com

(850) 617-8921