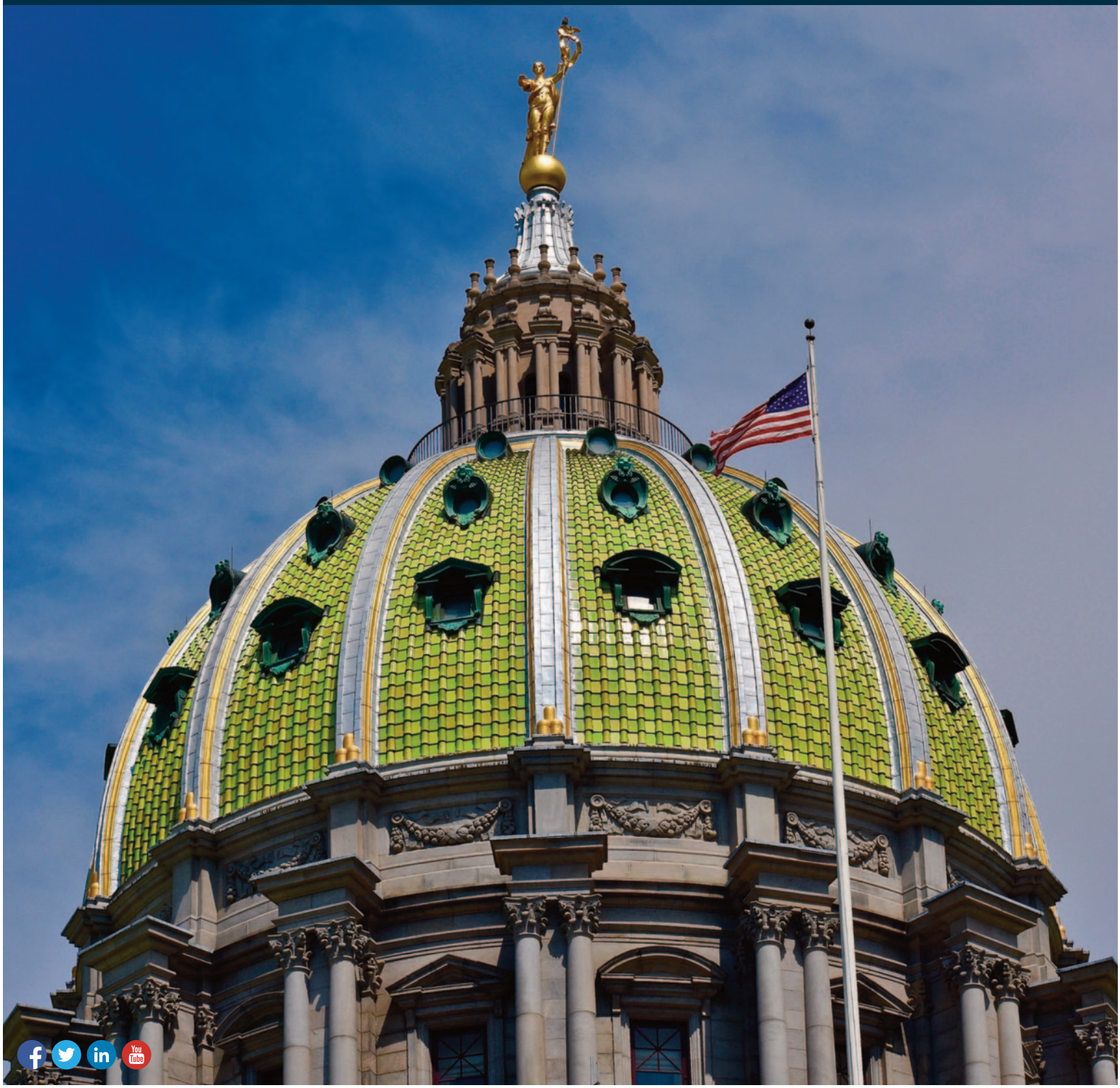
pennsylvania
DEPARTMENT OF COMMUNITY
& ECONOMIC DEVELOPMENT

PA-TEDTRAC COUNTY USER MANUAL

State Tax Equalization Board | August 2020



Commonwealth of Pennsylvania | Tom Wolf, Governor
PA Department of Community & Economic Development | dced.pa.gov

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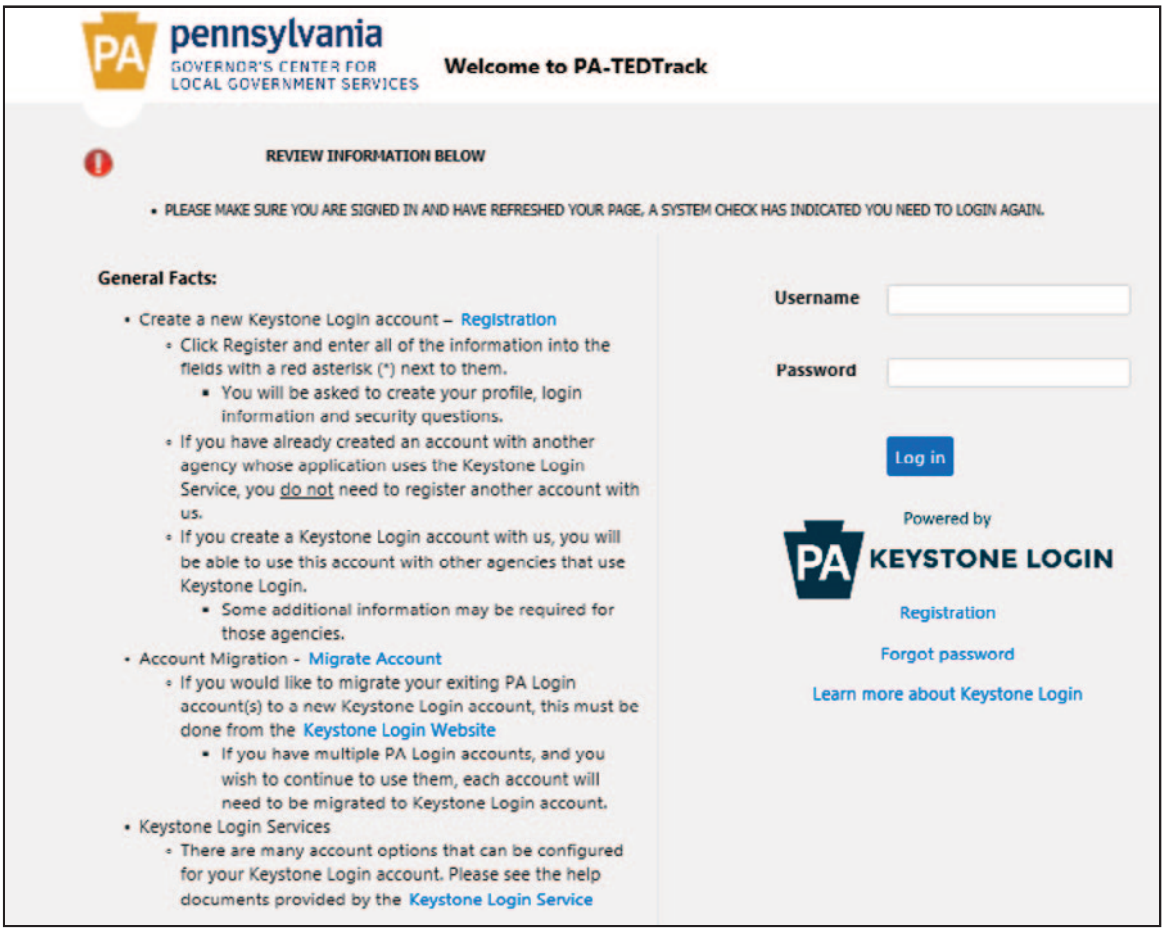
Login

To login, go to: http://apps.dced.pa.gov/patedtrac/logon.aspx

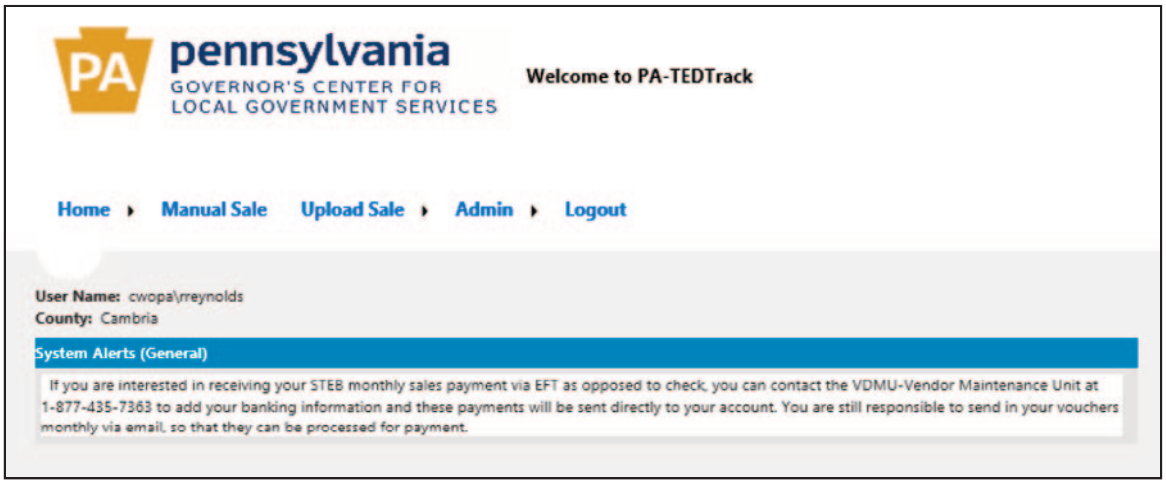


- Enter username and password and click **[Log in]**
- If you **do not** have an account, do the following:
  - Go to https://keystonelogin.pa.gov/Account/Register and register for an account or click on the Create a new Keystone Login account – Registration on the Login page.
  - After creating an account, email the following information to PA-TED@pa.gov
    - First AND Last Name
    - Username
    - Email address
    - County
    - Indicate - Clerk or Manager Role
    - Telephone #
  - If you have **forgotten** your password, reach out to STEB for assistance **before** you click on the **Forgot Password** on the Login page. STEB may be able to provide guidance and save unnecessary steps to retrieve your password before clicking https://keystonelogin.pa.gov/Account/ForgotPassword and follow the instructions for "Forgot Password"

Home

Upon login, users will be redirect to the Home screen. The home screen will display the username and county of the user that is logged in. If the username and county are incorrect, please contact STEB. The **Home** screen will also display any **Alerts** posted by the STEB Administrators. Please be sure to read all alerts for important information.

Example Home screen:



County User – Clerk

Menu Options

Sales Entry

Two options to upload sales.

1. Manual Entry – **Manual Sale**
2. Upload *(preferred)* – **Upload Sale**

NOTE: For the sales validation process, refer to the *STEB Sales Validation and Submission Operations Manual* prior to entry or contact STEB for training.

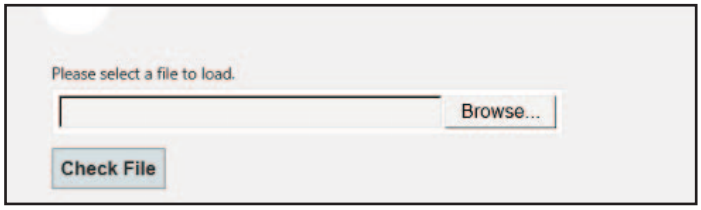
Manual Entry

- Select **Manual Sale** from the menu bar
- Complete the manual sales entry form
  - All fields must be filled before submitting a sale
  - All Parcel IDs must begin with the letter **P**
- Select **Submit Sale** to enter the sale
- Select **Next Sale** to enter more sales, or if complete, sales may now be viewed
- **Clear Form** to erase data entered for individual sale to start again

- Select **View Sales** to review all the sales entered

Upload

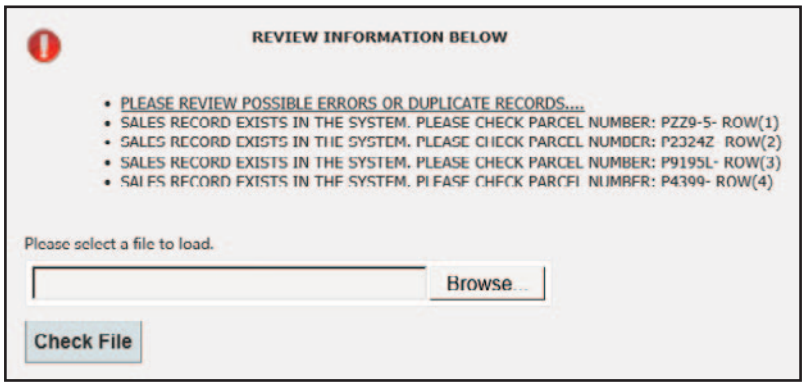
- Select **Upload Sale** from the menu bar
- **Browse** to the document to be uploaded
- Click **Check File**
  Note: *This step will check for any errors in the upload file.*



Upload Errors

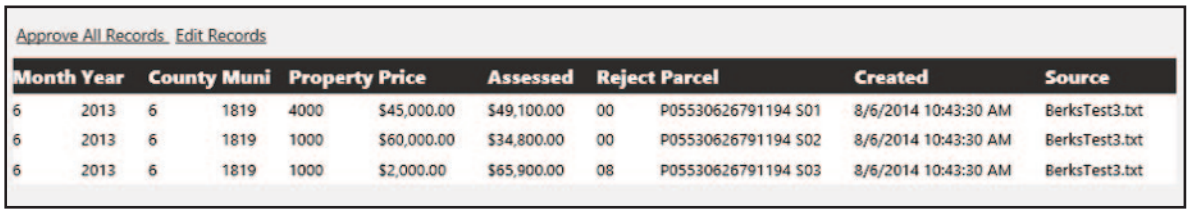
If any errors are found, the document will not upload, errors need to be corrected on the file and uploaded again. Please reference the **STEB PA-TEDTrac UPLOAD DOCUMENT PROCESS**, for help to identifying errors.

Error Example:



Upload Approval

If no errors are detected, records will load and display in a grid. It is ***strongly recommended*** to review all records at this time for accuracy. Please see the **Sales Approval/Edit Section** in this document for additional instructions on reviewing and approving sales.

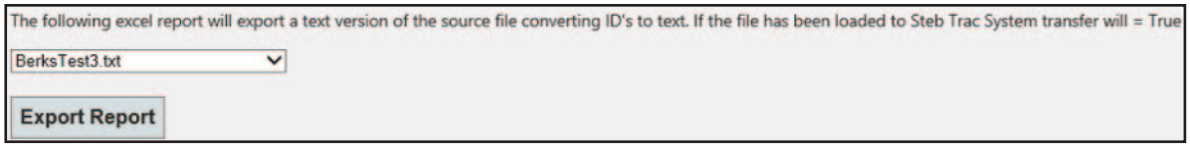


Month	Year	County	Muni	Property	Price	Assessed	Reject	Parcel	Created	Source
6	2013	6	1819	4000	$45,000.00	$49,100.00	00	P05530626791194 S01	8/6/2014 10:43:30 AM	BerksTest3.txt
6	2013	6	1819	1000	$60,000.00	$34,800.00	00	P05530626791194 S02	8/6/2014 10:43:30 AM	BerksTest3.txt
6	2013	6	1819	1000	$2,000.00	$65,900.00	08	P05530626791194 S03	8/6/2014 10:43:30 AM	BerksTest3.txt

- If changes need to be made, click **Edit Records**. Users will be redirected to the County Screen to edit records.
- If no changes are needed, records can be approved to move to the Manager. Click **Approve All Records**. Sales will disappear from view and move to the Manager for review and approval.

Upload Details Report

There is an option to print the uploaded file before or after approval. The report exports in an excel format. Once the file upload is complete, it will appear under **Upload Sales** in the **Upload Detail Report.**



Select the file from the dropdown and click **Export Report.**

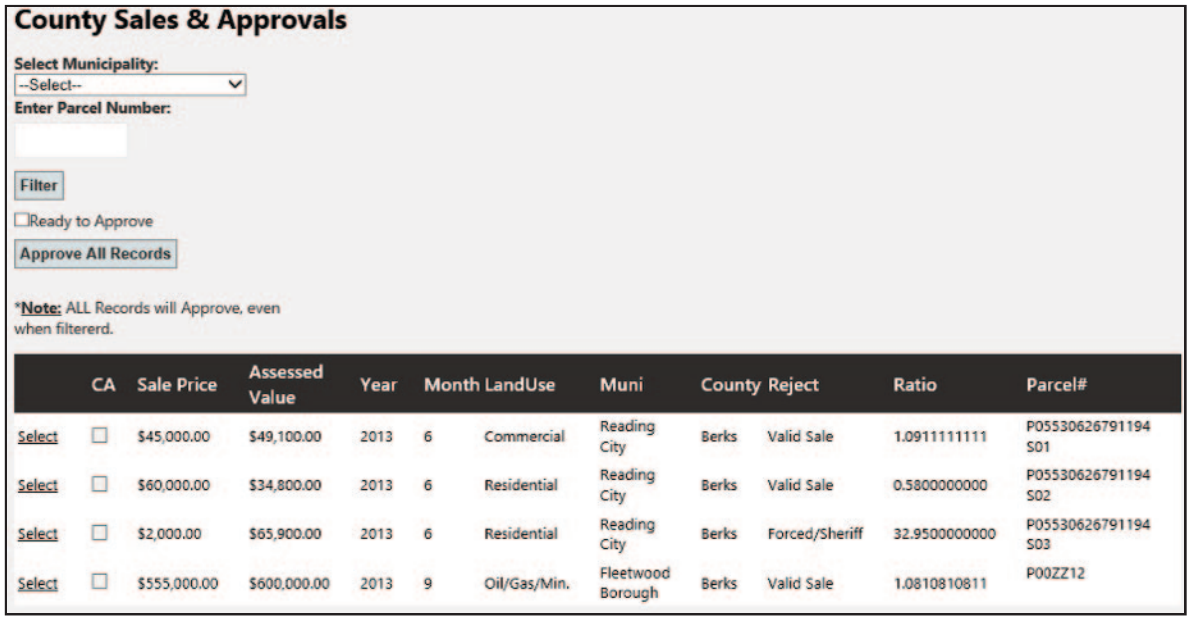
Sales Approval/Edits (Clerk)

To view all county sales that have been entered BUT not yet approved, go to the menu bar and Select **County Sales.**

County Sales (Clerk)

For sales not immediately approved by the clerk after upload or manual entry, this screen is where the clerk can edit and approve sales. ***Note:*** In a county where there are two distinct roles set up, it is necessary for the clerk to approve sales. If the clerk role does not approve sales, the manager role will not be able to view or approve sales.

If needed, there are two methods for filtering records. Sort by Municipality or by specific Parcel Number, then click **Filter.**



County Sales & Approvals

Select Municipality: --Select--

Enter Parcel Number:

Filter

Ready to Approve

Approve All Records

*Note: ALL Records will Approve, even when filtererd.

	CA	Sale Price	Assessed Value	Year	Month	LandUse	Muni	County	Reject	Ratio	Parcel#
Select	☐	$45,000.00	$49,100.00	2013	6	Commercial	Reading City	Berks	Valid Sale	1.0911111111	P05530626791194 S01
Select	☐	$60,000.00	$34,800.00	2013	6	Residential	Reading City	Berks	Valid Sale	0.5800000000	P05530626791194 S02
Select	☐	$2,000.00	$65,900.00	2013	6	Residential	Reading City	Berks	Forced/Sheriff	32.9500000000	P05530626791194 S03
Select	☐	$555,000.00	$600,000.00	2013	9	Oil/Gas/Min.	Fleetwood Borough	Berks	Valid Sale	1.0810810811	P00ZZ12

Clerk Approval – to approve the records, check the box next to **Ready to Approve** and click **Approve All Records.** ***Note:*** ALL Records will approve, even when filtered – please make any/all edits *prior to approving*. Upon approval, records will no longer be able to be viewed and will move to the Manager.

Edit Record: To edit any information on a record **(prior to approval)**, click **Select** next to record to be edited. The user will be redirected back to the Manual Screen. Sales can be edited in all fields EXCEPT Parcel#, which cannot be edited. If the parcel number needs to be edited, manually enter the sale with all information and the correct parcel number. Click submit and the sale will update. Immediately delete the sale with the incorrect parcel or make note for the Manager to delete when reviewing the sales before approval or contact STEB to assist in the removal of the sale.

County User – Manager

Menu Options

Managers have the same view as Clerks. In a county where there are two distinct roles set up, it is not necessary for the Manager to use the **Manual Sale** or the **Upload Sale** screens. However, if the Clerk is not available, the Manager can enter sales. For instructions to use those two screens, see the sections under the Clerk Role above.

Sales Approval/Edits (Manager)

To review all county sales entered but not yet approved, go to the menu bar and Select **County Sales**.

County Sales (Manager)

It is *strongly recommended* for the Manager to review all records for accuracy before approving. To approve sales to be sent to the STEB Staff, the Manager can find the records on the **County Sales** screen.

There are two methods for filtering records. Sort by Municipality or by specific Parcel Number, then click **Filter.**

The column “CA” will display checkmarks in boxes to indicate the Clerk has entered, reviewed and approved the sales and are waiting for Manager Approval. **A manager can still view and approve without the Clerk Approval box being checked.*

Manager Approval – to approve the records, check the box next to **Ready to Approve** and click **Approve All Records.** ***Note:*** ALL Records will approve, even when filtered – please make any/all edits prior to approving. Upon approval, records will no longer be able to be viewed and will move to STEB.*

Edit Record: To edit any information on a record **(prior to approval)**, click **Select** next to record to be edited. The user will be redirected back to the Manual Screen. Sales can be edited in all fields EXCEPT Parcel#, which cannot be edited. If the parcel number needs to be edited, manually enter the sale with all information and the correct parcel number. Click submit and the sale will update. Immediately delete the sale with the incorrect parcel or contact STEB to assist in the removal of the sale.

***NOTE: Once all sales have been approved, they will no longer be in view and will only be available to the STEB staff for their approval. Please contact STEB if you are aware of an issue with sales so they can be corrected internally.**

Contact

If you require assistance, please contact the STEB staff:

Phone: 717-787-5950
Email: PA-TED@pa.gov

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State Tax Equalization Board Division
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