

PA-TEDTRAC COUNTY USER MANUAL

State Tax Equalization Board | August 2020



Table of Contents

Login	1
Home	2
County User – Clerk	3
Sales Entry	3
Manual Entry	3
Upload	3
Upload Errors	4
Upload Approval	4
Upload Details Report	4
Sales Approval/Edits (Clerk)	5
County Sales (Clerk)	5
County User – Manager	6
County Sales (Manager)	6
Contact	7

Login

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

PA pennsylvania
GOVERNOR'S CENTER FOR
LOCAL GOVERNMENT SERVICES

Welcome to PA-TEDTrack

REVIEW INFORMATION BELOW

PLEASE MAKE SURE YOU ARE SIGNED IN AND HAVE REFRESHED YOUR PAGE, A SYSTEM CHECK HAS INDICATED YOU NEED TO LOGIN AGAIN.

General Facts:

- Create a new Keystone Login account – [Registration](#)
 - Click Register and enter all of the information into the fields with a red asterisk (*) next to them.
 - You will be asked to create your profile, login information and security questions.
 - If you have already created an account with another agency whose application uses the Keystone Login Service, you do not need to register another account with us.
 - If you create a Keystone Login account with us, you will be able to use this account with other agencies that use Keystone Login.
 - Some additional information may be required for those agencies.
- Account Migration – [Migrate Account](#)
 - If you would like to migrate your exiting PA Login account(s) to a new Keystone Login account, this must be done from the [Keystone Login Website](#)
 - If you have multiple PA Login accounts, and you wish to continue to use them, each account will need to be migrated to Keystone Login account.
- Keystone Login Services
 - There are many account options that can be configured for your Keystone Login account. Please see the help documents provided by the [Keystone Login Service](#)

Username

Password

Log in

Powered by
PA KEYSTONE LOGIN

[Registration](#)

[Forgot password](#)

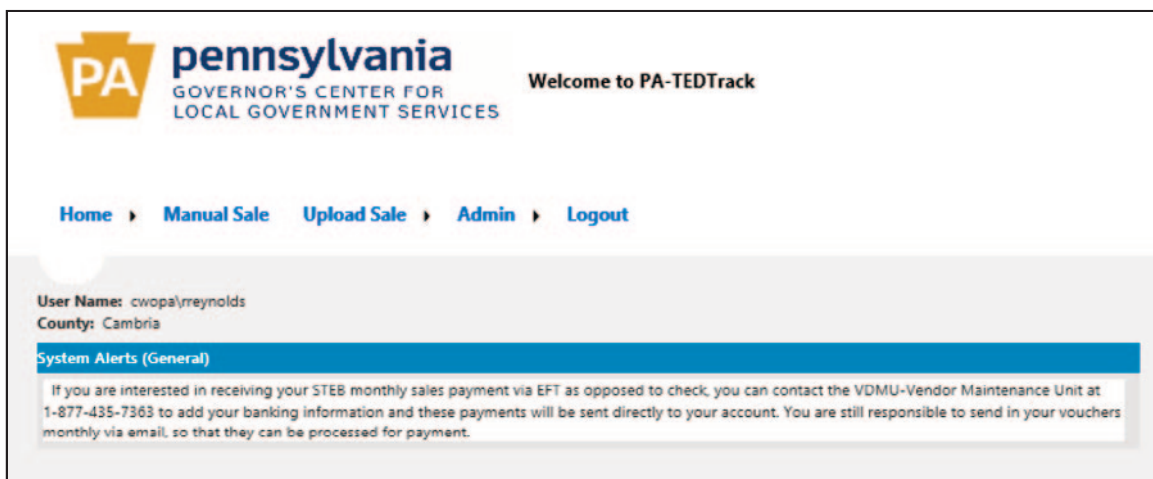
[Learn more about Keystone Login](#)

- 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



A horizontal menu bar with a light gray background and a dark gray border. It contains six items: 'Home', 'County Sales', 'Manual Sale', 'Upload Sale', 'Contact', and 'Logout'. A small right-pointing arrow is located between 'Upload Sale' and 'Contact'.

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

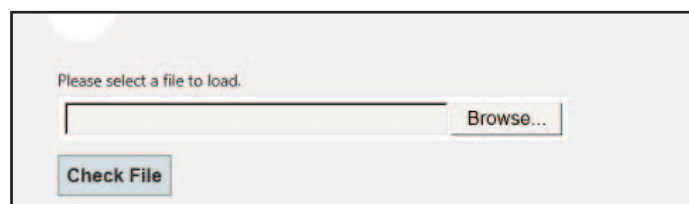
- Select **Manual Sale** from the menu bar
- Complete the manual sales entry form
 - All fields must be filled before submitting a sale
 - All Parcel IDs must begin with the letter **P**
- Select **Submit Sale** to enter the sale
- Select **Next Sale** to enter more sales, or if complete, sales may now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



A screenshot of the 'Sales Entry' form. It has a light gray background and a dark gray border. The form contains several input fields and dropdown menus: 'Parcel ID' (text box), 'County' (dropdown menu with 'Lebanon' selected), 'Municipality' (dropdown menu with '--Select--' selected), 'Year' (dropdown menu with '--Select--' selected), 'Month' (dropdown menu with '--Select--' selected), 'Sale Price' (text box), 'Assessed Value' (text box), 'Land Use' (dropdown menu with '--Select--' selected), and 'Reject Code' (dropdown menu with '--Select--' selected). At the bottom, there are four buttons: 'Submit Sale', 'Clear Form', 'Next Sale', and 'View Sales'.

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.



A screenshot of the file upload interface. It has a light gray background and a dark gray border. At the top, it says 'Please select a file to load.' Below this is a text box for the file name and a 'Browse...' button. At the bottom, there is a 'Check File' button.

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:



REVIEW INFORMATION BELOW

- PLEASE REVIEW POSSIBLE ERRORS OR DUPLICATE RECORDS....
- SALES RECORD EXISTS IN THE SYSTEM. PLEASE CHECK PARCEL NUMBER: PZZ9-5- ROW(1)
- SALES RECORD EXISTS IN THE SYSTEM. PLEASE CHECK PARCEL NUMBER: P2324Z ROW(2)
- SALES RECORD EXISTS IN THE SYSTEM. PLEASE CHECK PARCEL NUMBER: P9195L ROW(3)
- SALES RECORD EXISTS IN THE SYSTEM. PLEASE CHECK PARCEL NUMBER: P4399- ROW(4)

Please select a file to load.

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.

[Approve All Records](#) [Edit Records](#)

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**.

The following excel report will export a text version of the source file converting ID's to text. If the file has been loaded to Steb Trac System transfer will = True

BerksTest3.txt ▼

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 filtered.

	CA	Sale Price	Assessed Value	Year	Month	LandUse	Muni	County	Reject	Ratio	Parcel#
Select	<input type="checkbox"/>	\$45,000.00	\$49,100.00	2013	6	Commercial	Reading City	Berks	Valid Sale	1.0911111111	P05530626791194 S01
Select	<input type="checkbox"/>	\$60,000.00	\$34,800.00	2013	6	Residential	Reading City	Berks	Valid Sale	0.5800000000	P05530626791194 S02
Select	<input type="checkbox"/>	\$2,000.00	\$65,900.00	2013	6	Residential	Reading City	Berks	Forced/Sheriff	32.9500000000	P05530626791194 S03
Select	<input type="checkbox"/>	\$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

Home	County Sales	Manual Sale	Upload Sale	▶	Contact	Logout
------	--------------	-------------	-------------	---	---------	--------

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**.

County Sales & Approvals

Select Municipality:
--Select--
Enter Parcel Number:

☐ Ready to Approve

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

	CA	MA	Sale Price	Assessed Value	Year	Month	LandUse	Muni	County	Reject	Ratio	Parcel#
Select	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$45,058.00	\$49,158.00	2013	1	Oil/Gas/Min.	Sinking Spring Borough	Berks	Multiple-Parcel	1.0909938302	P1234567890
Select	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$45,059.00	\$49,159.00	2013	1	Land (More than 10 Acres)	South Heidelberg Township	Berks	Estate Sale	1.0909918107	P0987654321

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

Department of Community & Economic Development
State Tax Equalization Board Division
Commonwealth Keystone Building
400 North Street, 4th Floor
Harrisburg, PA 17120-0225