

# NH DRA MUNICIPAL TAX RATE SETTING PORTAL (MTRSP)

Michelle Clark, Municipal Accounts Auditor  
Jamie Dow, Municipal Accounts Auditor

## Municipal & Property Division



Lindsey M. Stepp, Commissioner  
Ora M. LeMere, Assistant Commissioner  
109 Pleasant Street, Concord, NH 03301  
603-230-5000

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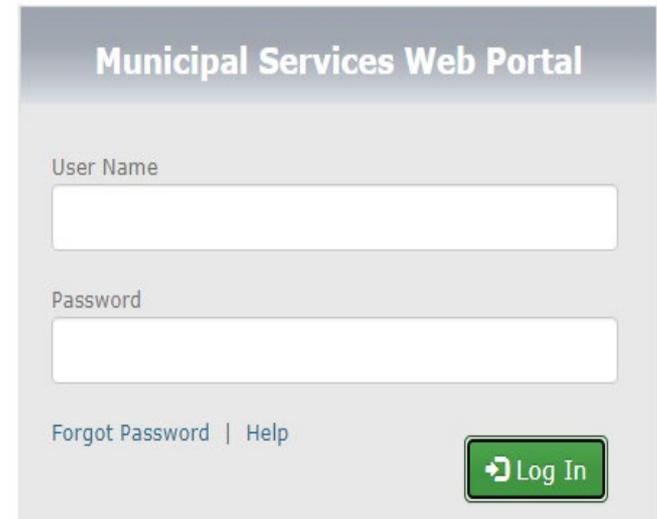
For the current status of any tax law, practitioners and taxpayers should consult the source documents (i.e., Revised Statutes Annotated, Rules, Case Law, Session Laws, etc.) for independent verification.

# Overview

- Access to Web portal – levels of access
- General navigation of web portal
- Software generation of forms
- Prereview Process
- Common Issues
- Submission to DRA/Uploads

# Credentials

- Three access levels
  - Administrators
    - Create additional accounts
    - Prepare/upload and submit forms and documents
    - Receive ‘Alerts’ messages from the web portal
    - View/run reports
  - Users
    - Prepare forms and documents
      - If given ability, upload documents
  - Viewers
    - View completed, uploaded documents and forms



The screenshot shows the login interface for the Municipal Services Web Portal. It features a header with the title 'Municipal Services Web Portal'. Below the header, there are two input fields: 'User Name' and 'Password'. To the left of the 'Log In' button, there are links for 'Forgot Password' and 'Help'. The 'Log In' button is a green rectangle with a white arrow icon and the text 'Log In'.

# Home Screen

Home

Budget

Financial

Tax Rates

Reports

Settings



## Home

JULY Annual Meeting

Ashuelot Pond Dam

- Associated Entity -

2023

### Advisor Information

**Jamie Dow**  
 (603) 230-5092  
 jamie.l.dow@dra.nh.gov



**Budget Home**  
 Budgeting and Appropriations

Continue ▶



**Financial Home**  
 Submit Revised Estimates

Continue ▶



**Tax Rates**  
 Assign Initial & Final Rates

Continue ▶



**Report Center**  
 View and Download Reports

Continue ▶



**Settings**  
 Application Configuration

Continue ▶

#### Status

- Pre-Review
- Appropriations Review
- Financial Review
- Revenue Review
- Assessments

**TAX RATE NOT SET**

[Budget Forms](#) [Financial Forms](#) [Administrative Forms](#) [Other Documents](#)

Show 50 entries

Search:

Document	Due Date	Status	Submitted Date	Approval Date	Go To	Notes
DRA Approved Approp. (MS-232-R)	7/27/2023					

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# Navigating

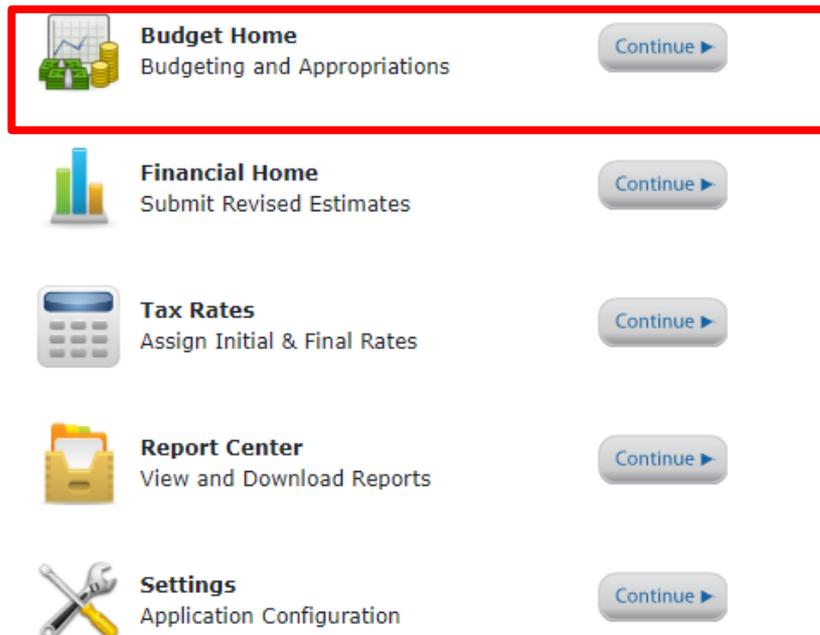


New Hampshire Department of Revenue Administration  
Municipal Tax Rate Setting Portal

Summary Home **Budget** Financial Tax Rates

 **Home**

Alexandria - Associated Entity -



 **Budget Home**  
Budgeting and Appropriations [Continue ▶](#)

 **Financial Home**  
Submit Revised Estimates [Continue ▶](#)

 **Tax Rates**  
Assign Initial & Final Rates [Continue ▶](#)

 **Report Center**  
View and Download Reports [Continue ▶](#)

 **Settings**  
Application Configuration [Continue ▶](#)

Each tab can be accessed from the top of the screen

**OR**

Using the "Continue" button next the specific title.



# Home

Alexandria

- Associated Entity -

2022

## Advisor Information

**Michelle Clark**  
 (603) 230-5091  
 michelle.j.clark@dra.nh.gov

Summary

Home

Budget

Financial

Tax Rates

Reports

Utilities

Settings



# Home

Alexandria

- Associated Entity -

2022

## Advisor Information

**Michelle Clark**  
 (603) 230-5091  
 michelle.j.clark@dra.nh.gov

- Associated Entity -  
 Newfound Area

Summary

Home

Budget

Financial

Tax Rates

Reports



# Home

Alexandria

- Associated Entity -

2022

- 2023
- 2022
- 2021
- 2020
- 2019
- 2018
- 2017
- 2016
- 2015
- 2014
- 2013



**Budget Home**  
 Budgeting and Appropriations

Continue ▶



**Financial Home**  
 Submit Revised Estimates

Continue ▶

# Status Checklist

## Summary of the stages of the Tax Rate Setting Process

1. The documents and information that must be submitted to the DRA
2. Steps involved in the setting of the final tax rate.

Status Admin

- Pre-Review
- Appropriations Review
- Reserves & Trusts
- Financial Review
- Revenue Review
- Assessments

1

- Preliminary Rate
- Overlay Request
- Final Rate (Advisor)
- Final Rate (Administrator)
- Commitment Amount

2

**TAX RATE NOT SET**

# Forms and Documents Table

[Budget Forms](#)
[Financial Forms](#)
[Administrative Forms](#)
[Other Documents](#)

Show  entries Search:

Document	Due Date	Status	Submitted Date	Approval Date	Go To	Notes
DRA Approved Approp. (MS-232-R)	7/27/2023					
Signed Appropriations As Voted (MS-232)	7/27/2023				<a href="#">Upload Attachment</a>	
Report of Appropriations Actually Voted (MS-232)	7/27/2023					
Budget of the Village District (MS-636)	7/27/2023					
Village Warrant As Posted	7/27/2023				<a href="#">Upload Attachment</a>	
Signed Annual Meeting Minutes	7/27/2023				<a href="#">Upload Attachment</a>	
Budget As Posted (MS-636)	7/27/2023				<a href="#">Upload Attachment</a>	

Showing 1 to 7 of 7 entries First Previous 1 Next Last

Budget forms – Annual meeting documents

Financial Forms – Revised revenues/MS535/MS1/audit

Administrative Forms – Annual Report/MS123

Other Documents – Education tax warrant/misc information

# Web Portal Support



New Hampshire Department of Revenue Administration  
Municipal Tax Rate Setting Portal

[Help](#) | [My Profile](#) | [Log Out \(Jamie Dow\)](#)

- Home
- Budget
- Financial
- Tax Rates
- Reports
- Settings



Home

JULY Annual Meeting

Ashuelot Pond Dam

- Associated Entity -

2023

### Advisor Information

Jamie Dow  
(603) 230-5092  
jamie.l.dow@dra.nh.gov



## Axiomatic Support Portal

Welcome  
[Login](#)

- Home
- Solutions

### How can we help you today?

Enter your search term here...

SEARCH

- [+ New support ticket](#)
- [📄 Check ticket status](#)
- [☎ 1-888-508-8179](#)

[Solution home](#)

## NH DRA Municipal Tax Rate Setting Portal (MTRSP)

Getting Started (7)

Proposed Budget (7)

[First-Time Users](#)

[Importing Prior Year Articles](#)

# Topics Covered

- Draft the proposed budget, create warrant articles, import PY.
- Edit and delete warrant articles.
- Create and submit default budgets.
- Request and complete the pre-review process.
- Review, finalize, and submit the proposed budget.
- Submit the voted appropriations after annual meeting.
- Apply the default budget if the operating budget fails at meeting.
- Submit the revised estimated revenues.
- View, save, and print reports.

*And many more....*

# Budget Home

- Home
- Budget**
- Financial
- Tax Rates
- Reports
- Settings

**Budget Manchester 2023**

**Prior Year Import Date: 4/18/2023**

Please create a new warrant article to begin

Show 100 entries

Search:

Actions	Number	Category	Type	Purpose	Raise Amount	Offset Amount	Status	Raise/Offset Match
	12	Operating Budget	Operating Budget by Function-Town	kjkjl	\$100.00	\$50.00	Draft	True/True
	CBD	Operating Budget	Operating Budget of the City	Budget	\$258,000.00	\$258,000.00	Draft	True/True
	CIP	Operating Budget	Operating Budget of the City	Budget	\$167,797,842.00	\$167,797,842.00	Draft	True/True
	DRA M&R Estimate	Operating Budget	Operating Budget of the City	Budget	\$7,659,200.00	\$7,659,200.00	Draft	True/True
	EPD	Operating Budget	Operating Budget of the City	Budget	\$16,324,572.00	\$16,324,572.00	Draft	True/True
	General Fund	Operating Budget	Operating Budget of the City	Budget	\$166,471,585.00	\$56,363,974.00	Draft	True/True
	MTA	Operating Budget	Operating Budget of the City	Budget	\$1,373,420.00	\$0.00	Draft	True/True
	MWW	Operating Budget	Operating Budget of the City	Budget	\$26,267,722.00	\$26,267,722.00	Draft	True/True
	Parking	Operating Budget	Operating Budget of the City	Budget	\$5,652,561.00	\$5,652,561.00	Draft	True/True

Showing 1 to 9 of 9 entries

First Previous 1 Next Last

- Create Warrant
- View/Calculate Budget
- Request Pre-Review
- View Budget Report**
- Warrant Report

## 2022 - 6,130 Warrant Articles Submitted

# Pre-Review Process

## Warrant Drafting



Budget (Town Name) 2017

Please create a new warrant article to begin

Show **100** entries Search:

Actions	Number	Category	Type	Purpose	Raise Amount	Offset Amount	Status	Raise/Offset Match
	01	Non-Monetary	Other - Blank	Non-Monetary Example	\$0.00	\$0.00	Draft	True/True
	02	Operating Budget	Operating Budget-Town-SB2	Operating Budget	\$1,588,210.00	\$727,812.00	Draft	True/True
	03	Individual	Other	Individual Article Example	\$160,000.00	\$160,000.00	Draft	False/False
	04	Special	Use of CRF or ETF and Taxation	Special Article Example #1	\$191,000.00	\$191,000.00	Draft	True/True
	05	Special	Use of CRF or ETF and Taxation	Special Article Example #2	\$11,281.00	\$11,281.00	Draft	True/True
	DEF	Operating Budget	Default Budget	Default Budget	\$1,589,575.00	\$0.00	Final	True/True

Showing 1 to 6 of 6 entries First Previous 1 Next Last

[Create Warrant](#)
[View/Calculate Budget](#)
[Request Pre-Review](#)
[View Budget Report](#)
[Default Budget](#)



**Draft warrant article entered**

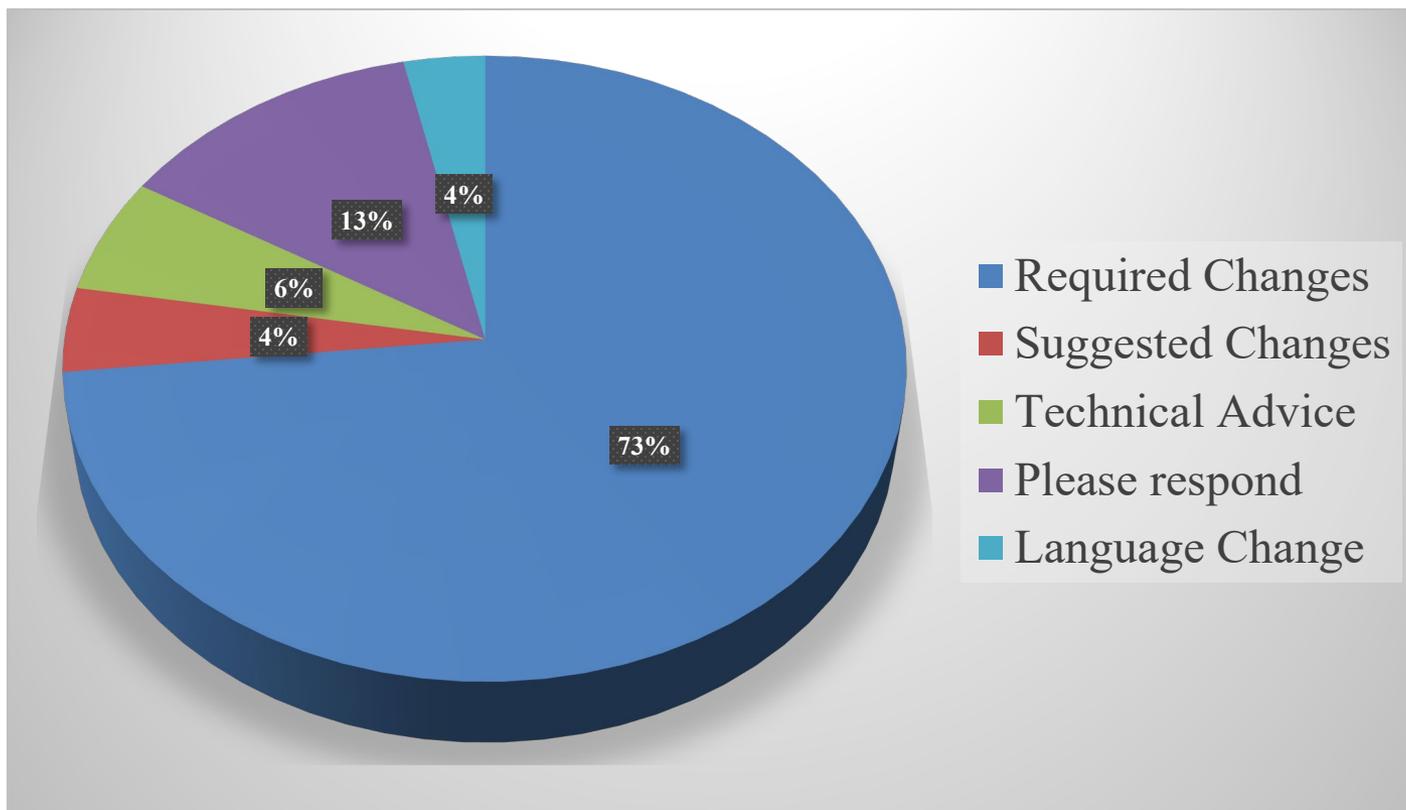


**Reviewed by advisor, comments provided**



**Reviewed by advisor**

# 2022



# Required Changes

- Proposed amounts < > Calculated amounts shown
- Warrant article language <> Proposed amounts
- All revenue offsets not shown
- Recategorize what “type” of warrant article
- Reclassification of accounts ( Refer to chart of accounts)
- Vote Requirements (all long-term debt 3/5 ballot vote)
- Recommendations not shown ( reflect within warrant article & appropriate column on budget form)

# Proposed < > Calculated

Home

Budget

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## Budget (Warrant) Ashuelot Pond Dam 2023

Enter Information about Warrant Article

[Show/Hide](#)

Warrant Article Information	Proposed Appropriations	Estimated Offsetting Revenue
<b>Number:</b> <input type="text" value="02"/>	<b>Recommended:</b> <input type="text" value="\$1,000"/>	<b>Estimated Revenues:</b> <input type="text" value="\$500"/>
<b>Category:</b> Individual	<b>Not Recommended:</b> <input type="text" value="\$0"/>	
<b>Type:</b> Equipment Purchase	<b>Total Proposed:</b> \$1,000	<b>Total Estimated Revenues:</b> \$500
<b>Purpose:</b> <input type="text" value="Purchase Truck"/>	<b>Calc Recommended:</b> \$0	<b>Calc Estimated Revenues:</b> \$0
	<b>Calc Not Recommended:</b> \$0	

### Article Language

To see if the village district will vote to raise and appropriate the sum of \$500 for the purpose of purchasing truck with \$500 from Highway Capital Reserve fund and the \$500 from unassigned fund balance. (Majority vote required) Recommended by the Commissioners.

# Warrant Article < > Proposed

Home

Budget

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## Budget (Warrant) Ashuelot Pond Dam 2023

Enter Information about Warrant Article

Show/Hide

### Warrant Article Information

Number:

Category: Individual

Type: Equipment Purchase

Purpose:

### Proposed Appropriations

Recommended:

Not Recommended:

Total Proposed:

Calc Recommended:

Calc Not Recommended:

### Estimated Offsetting Revenue

Estimated Revenues:

Total Estimated Revenues:

Calc Estimated Revenues:

### Article Language

To see if the village district will vote to **raise and appropriate the sum of \$500 for the** purpose of purchasing truck with \$500 from Highway Capital Reserve fund and the \$500 from unassigned fund balance. (Majority vote required) Recommended by the Commissioners.

# All Revenue Sources Shown

Home

Budget

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Tax Rates

Reports

Settings



## Budget (Warrant) Ashuelot Pond Dam 2023

Enter Information about Warrant Article

Show/Hide

Warrant Article Information	Proposed Appropriations	Estimated Offsetting Revenue
<b>Number:</b> <input type="text" value="02"/> <b>Category:</b> Individual <b>Type:</b> Equipment Purchase <b>Purpose:</b> <input type="text" value="Purchase Truck"/>	<b>Recommended:</b> <input type="text" value="\$1,000"/> <b>Not Recommended:</b> <input type="text" value="\$0"/> <b>Total Proposed:</b> <b>\$1,000</b> <b>Calc Recommended:</b> <b>\$0</b> <b>Calc Not Recommended:</b> <b>\$0</b>	<b>Estimated Revenues:</b> <input type="text" value="\$500"/> <b>Total Estimated Revenues:</b> <b>\$500</b> <b>Calc Estimated Revenues:</b> <b>\$0</b>

### Article Language

To see if the village district will vote to raise and appropriate the sum of \$500 for the purpose of purchasing truck with \$500 from Highway Capital Reserve fund and the \$500 from unassigned fund balance. (Majority vote required) Recommended by the Commissioners.

# Recategorize “Type”

## Special Warrant Article

- a) Petition Article  
w/Appropriation
- b) Bond or Notes
- c) Capital Reserve  
Funds/Trusts or Special  
Fund
- d) Designated by  
Selectmen:
  - “Special”
  - “Non-Lapsing”
  - “Non-Transferable”

## Individual Warrant Article

- One time appropriation
- Collective Bargaining
- Purchase capital item
  - Revenue offsets:
    - taxation
    - unassigned fund  
balance
    - source grants
- Any appropriation not  
designated as special



## Budget (Warrant) Ashuelot Pond Dam 2023

Enter Information about Warrant Article

Show/Hide

Warrant Article Information	Proposed Appropriations	Estimated Offsetting Revenue
<b>Number:</b> <input type="text" value="02"/> <b>Category:</b> Individual <b>Type:</b> Equipment Purchase <b>Purpose:</b> <input type="text" value="Purchase Truck"/>	<b>Recommended:</b> <input type="text" value="\$1,000"/> <b>Not Recommended:</b> <input type="text" value="\$0"/> <b>Total Proposed:</b> <b>\$1,000</b> <b>Calc Recommended:</b> \$0 <b>Calc Not Recommended:</b> \$0	<b>Estimated Revenues:</b> <input type="text" value="\$500"/> <b>Total Estimated Revenues:</b> \$500 <b>Calc Estimated Revenues:</b> \$0

### Article Language

To see if the village district will vote to raise and appropriate the sum of \$500 for the purpose of purchasing truck with \$500 from Highway Capital Reserve fund and the \$500 from unassigned fund balance. (Majority vote required) Recommended by the Commissioners.

Categorized as an “individual” – it is being partially offset by a CRF which designates this article as a “special” warrant article .

# Budget Submitted

Home Budget Financial Tax Rates Reports Settings

## Appropriations

**Budget Andover 2023**

**Prior Year Import Date: 1/13/2023**

Please create a new warrant article to begin

Show  entries Search:

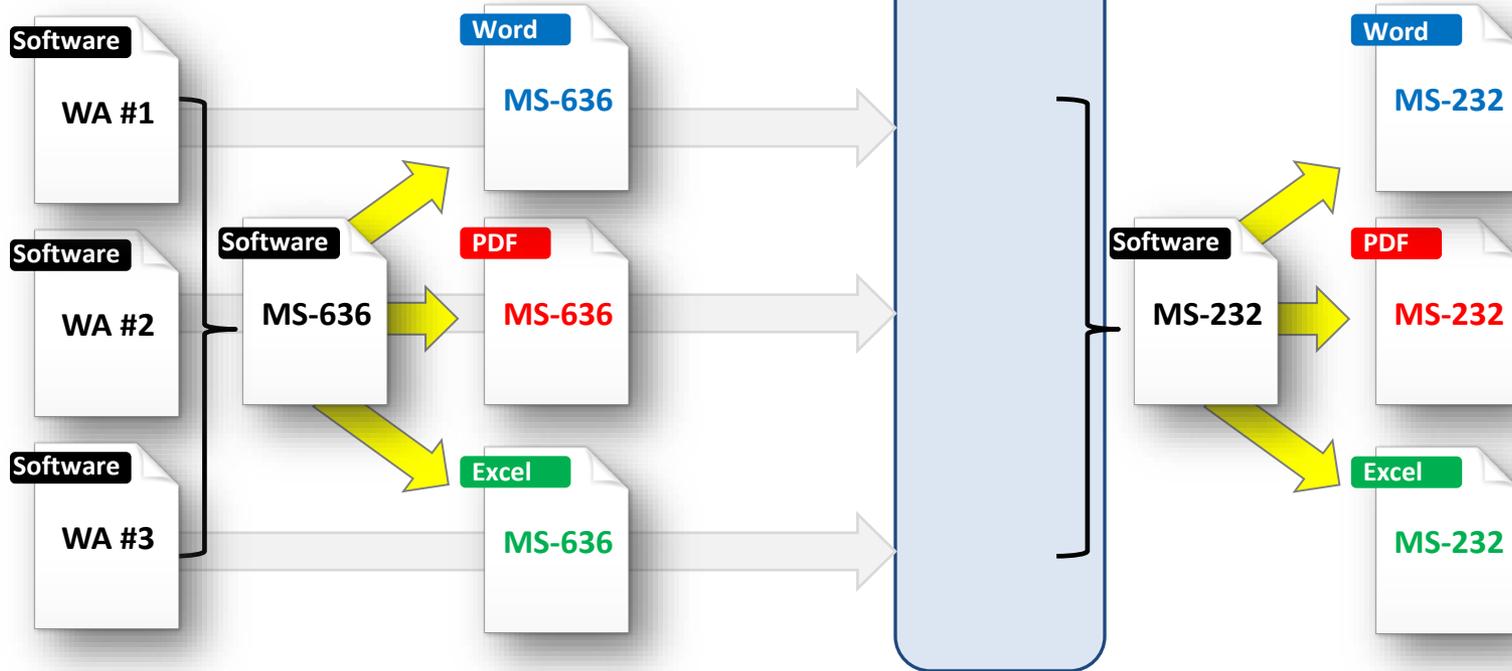
Actions	Number	Category	Type	Purpose	Raise Total	Raise Match	Meeting Status	DRA Status
	01	Non-Monetary	Other (Blank)	Election of Town Officers	\$0.00	True	Pass	
	02	Non-Monetary	Other (Blank)	Planning Board - Workforce Housing	\$0.00	True	Pass	
	03	Non-Monetary	Other (Blank)	Planning Board - Non-conforming Structures or Use	\$0.00	True	Pass	
	04	Non-Monetary	Increase/Decrease BOS	Increase Board of Selectmen to 5 Members	\$0.00	True	Pass	
	05	Special	Long-Term Borrowing	Bond for Construction of Highway Garage	\$0.00	True	Fail	
	06	Individual	Equipment Lease With Fiscal Funding Clause (Escape	Enter 6-Year Lease of Dump Truck	\$31,794.00	True	Pass	
	07	Operating Budget	Operating Budget-Town	Operating Budget	\$2,433,666.00	True	Pass	
	08	Special	Appropriate to CRF or ETF	Forest Fire Labor	\$5,000.00	True	Pass	
	09	Special	Other	Highway Garage Construction	\$875,000.00	True	Pass	
	10	Special	Appropriate to CRF or ETF	Town Buildings	\$20,000.00	True	Pass	
	11	Special	Appropriate to CRF or ETF	Transfer Station Projects	\$15,000.00	True	Pass	
	12	Special	Appropriate to CRF or ETF	Revaluation	\$11,300.00	True	Pass	
	13	Special	Appropriate to CRF or ETF	Road Equipment	\$15,000.00	True	Pass	
	14	Special	Appropriate to CRF or ETF	Highway Special Projects	\$150,000.00	True	Pass	

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# Software Generation of Forms

## Warrant Article Drafting & Budget as Proposed

## Appropriations Conversion and Submission



# 20 Days After Town Meeting

- Budget Home Tab
- Answer questions on each article

 Annual Meeting

Did the Warrant Article Pass or Fail?

- Select -

Was the Warrant Article Amended?

- Select -

Was Amendment Financial?

- Select -

Vote Counts

Yes:

No:

Percentage: N/A

Explain Amendment or Add Notes:

# If Amendment is Financial

- Update the Appropriations Box

Warrant Article Information	Amounts to be Raised
<p><b>Number:</b> 03</p> <p><b>Category:</b> Operating Budget</p> <p><b>Type:</b> Operating Budget-Town</p> <p><b>Purpose:</b> To see if the Town will vote to raise and appropri</p>	<p><b>Aprr. As Voted:</b> <input type="text" value="\$1,750,000"/></p> <p><b>Calc Raise Amount:</b> <input type="text" value="\$0"/></p>

- Update the chart of accounts (MS232)

**Appropriations**

General Government	Account Code Description	Board Recommended	Board Not Recommended	Appr As Voted	DRA Approved
Public Safety	4199 Other General Government	\$0	\$0	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>
Airport/Aviation Center	4197 Advertising and Regional Association	\$0	\$0	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>
Highways and Streets	4196	\$42,000	\$0	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>

- Save and RECALCULATE

***\*\*Revenue amendments will be updated on the MS434***

# Submissions

- Upload all pages of a document or form.
- Be sure documents and forms are certified by the appropriate signature(s)
- Do not upload documents as JPEGs.
- Documents once uploaded cannot be deleted  
- ask advisor to remove.

# Uploads

[Budget Forms](#)
[Financial Forms](#)
[Administrative Forms](#)
[Other Documents](#)

Show **50** entries Search:

Document	Due Date	Status	Submitted Date	Approval Date	Go To	Notes
Revised Estimated Revenues (MS-434)	9/1/2022	Pending	8/18/2022	<a href="#">Approve</a>	<a href="#">View Report</a>	
Financial Report of the Budget (MS-535)	4/1/2022	Completed	8/13/2022	8/23/2022	<a href="#">View Report</a>	
Report of Trust and Capital Reserve Funds (MS-9)	3/1/2022	Completed	1/29/2022	4/8/2022	<a href="#">View Report</a>	
Report of Common Trust Fund Investments (MS-10)	3/1/2022	Completed	1/29/2022	4/8/2022	<a href="#">View Report</a>	
MS-60 or CPA Financial Audit	12/31/2022				<a href="#">Upload Attachment</a>	
DRA Approved Est. Revenues (MS-434-R)						
Audit Waiver Request (MS-60W)	11/15/2021				<a href="#">Upload Attachment</a>	
Total Assessed Value (MS-1)	9/1/2022					
 Tax Collector's Report (MS-61)	3/1/2022	Completed	8/23/2022	8/23/2022	<a href="#">View Attachment</a> <a href="#">Upload Attachment</a>	
 Signed Financial Report of the Budget (MS-535)	4/1/2022	Completed	8/22/2022	8/23/2022	<a href="#">View Attachment</a> <a href="#">Upload Attachment</a>	
 Signed Revised Est. Revenues (MS-434S)	9/1/2022	Completed	8/18/2022	8/23/2022	<a href="#">View Attachment</a> <a href="#">Upload Attachment</a>	
 Report of Borrowing (MS-50)		Completed	4/22/2022	8/19/2022	<a href="#">View Attachment</a> <a href="#">Upload Attachment</a>	



## Uploads Alexandria 2023

### Step 1

Form Templates:

MS-60 or CPA Financial Audit ▼

### Step 2

Notes:

### Step 3

Upload File:

Choose File No file chosen

## File Upload Limitations

Size Limit: 90Mb

Image Files: .bmp, .jpg, .jpeg, .png, .gif, .tif, .tiff

Document Files: .pdf, .doc, .docx, .ppt, .pptx, .ppsx, .odt, .xls, .xlsx

“Form Templates” is a drop-down with various options where you choose what type of document you are uploading.

The system will automatically make the initial selection for you.

“Notes” allows a limited amount of text for reference purposes to be entered. This is optional and will be displayed in the “Notes” column of the Document Table in the previous slide after the upload has been completed.

# Financial Home

Home

Budget

Financial

Tax Rates

Reports

Settings



## Financial Ashuelot Pond Dam 2023



Revenue Review

Disabled



MS-535 Review

Continue ▶

# Resources

- DRA Website

(<http://www.revenue.nh.gov/mun-prop/mtrsp/index.htm>)

- Municipal Advisor

- Axiomatic

– Support line: 1-888-508-8179

**Questions?**