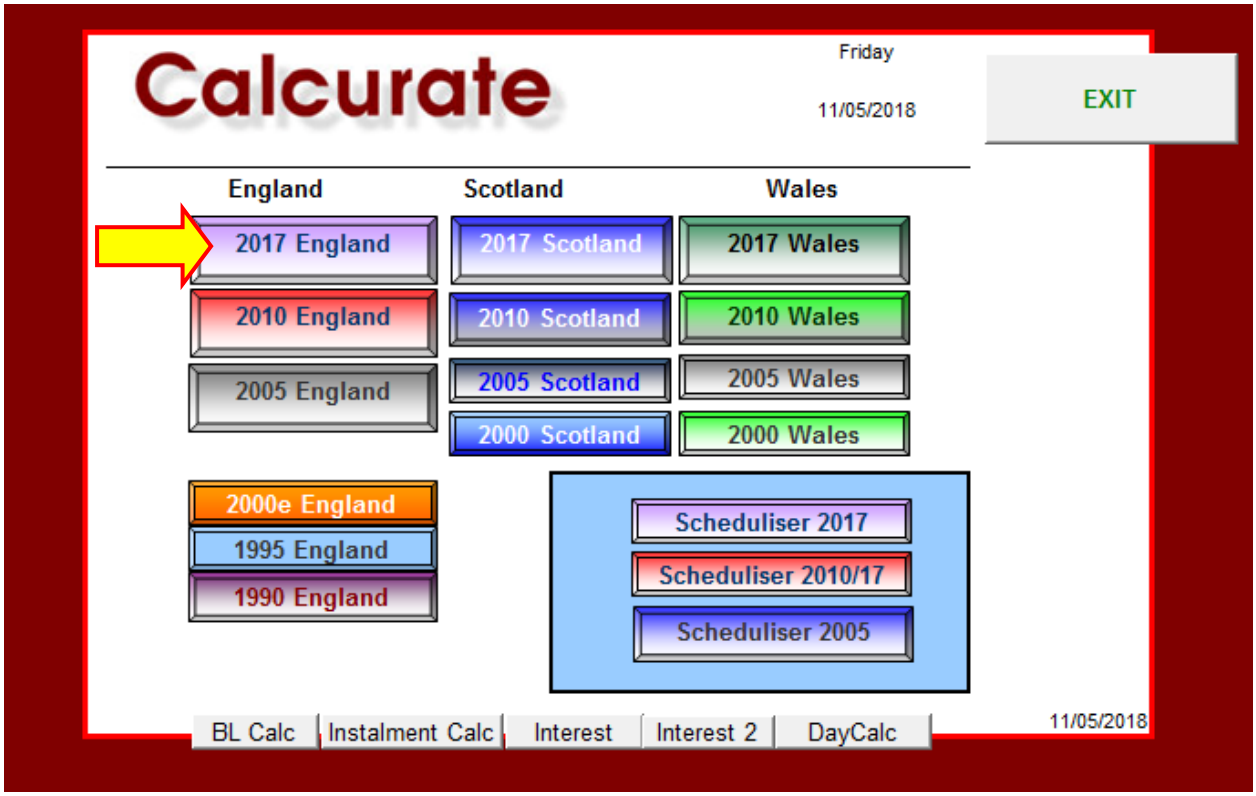
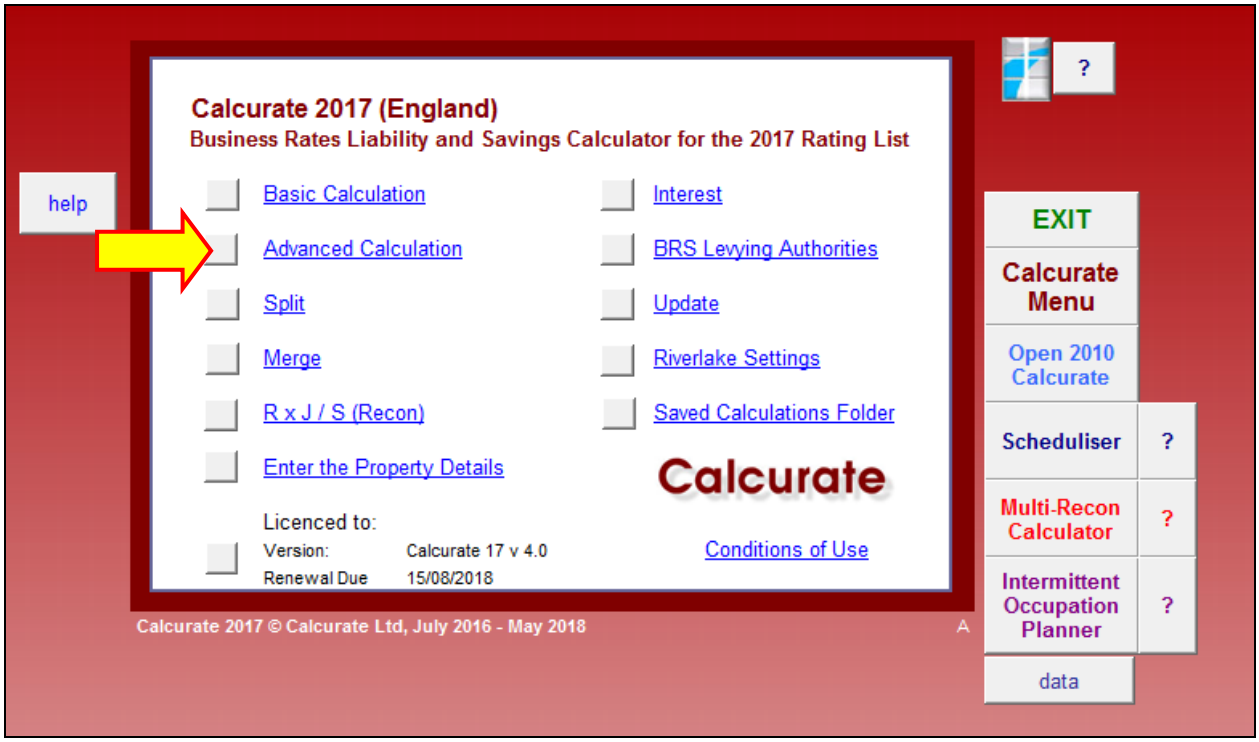
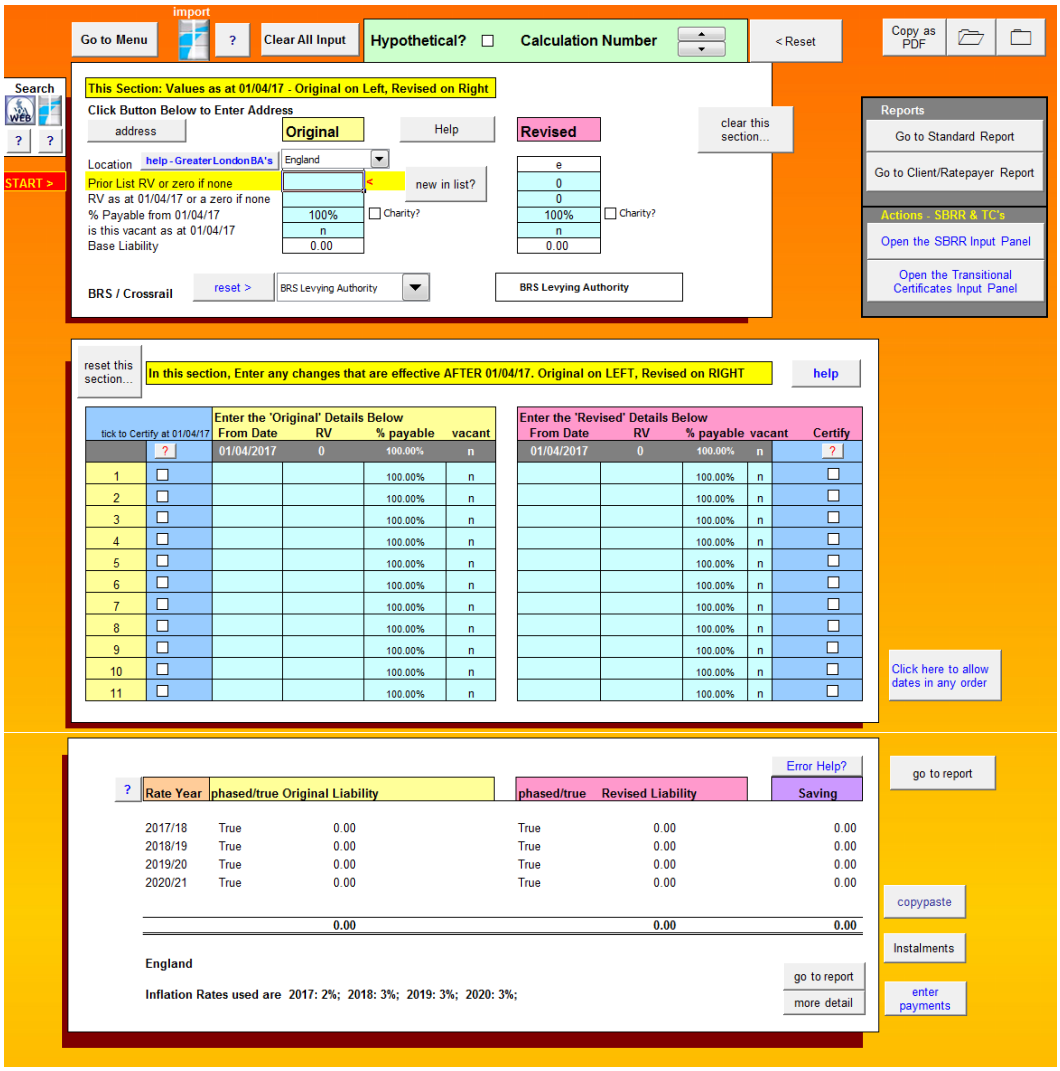
Module 2 – Advanced Calculator





Advanced Calculation

The Advanced Calculator is very versatile. The Advanced Calculator can be used with almost any sequence of events. It can be used to compare two different scenarios and show the liability resulting from each scenario. The difference between the two is shown as a saving or increase. The Advanced Calculator is also often used simply to calculate liability when there are several RV changes or where Transitional Certificates apply.



It is most important to understand that the Advanced Calculator has two totally separate sides. You may refer to these as “Original & Revised” or “Before & After” or simply “Left & Right”.

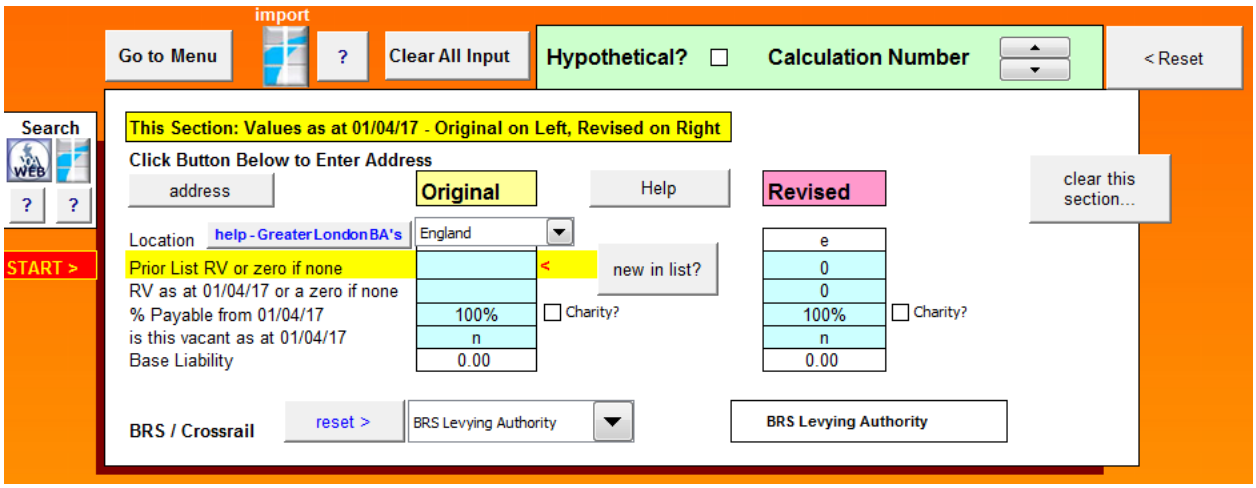
The two sides are completely independent of each other. The liability displayed on the LEFT is calculated using the details on the LEFT, and the liability displayed on the RIGHT is calculated using the details on the RIGHT. The difference between the two sets of figures is shown as a saving or an increase.

Dates (and the relevant RV’s) are entered in chronological order DOWN the page. You don’t have to have the same dates on each side – although it does help with direct comparisons.

The Advanced Calculator consists of three main sections (Top, Dates, Results), and two others (SBRR Input, TC Input) that can be opened when required.

The Top Section

This section is used to enter the values at 1/4/17 and 31/3/17 and other factors that apply at 1/4/17



Go to Menu: Takes you to the England 2017 Menu

Analyse Import button: see page 13

Clear All Input: Each section has its own Clear or Reset button, but 'Clear All' clears all sections in the Advanced.

Hypothetical & Calculation Number: These are displayed on the Standard Report – Use them when you want to show a calculation as 'Hypothetical' or when you want to number a series of calculations.

Search: Clicking the VOA WEB button will open the VOA website and list the entries for the postcode entered. If you have "Analyse" from Inform CPI, you can send the postcode to Analyse and use the "Riverlake" button on Analyse to search for that postcode.

Address Button: See pages 14 to 18

Location: England, Greater London, City of London

Help Greater London – see page 19

Input:

Prior List RV: Enter the RV as at 31/3/17 on the LEFT side. It will also appear on the RIGHT but you can enter a different figure on the RIGHT if you wish.

RV as at 1/4/17: Enter the RV as at 01/04/17 on the LEFT side. It will also appear on the RIGHT but you can enter a different figure on the RIGHT if you wish.

% Payable and Charity: If the client is not liable from 1/4/17 or the property is exempt at 1/4/17; enter a "% Payable" of zero.

If this a **Charity** tick the box, this is essential as it will determine which multiplier will be used.

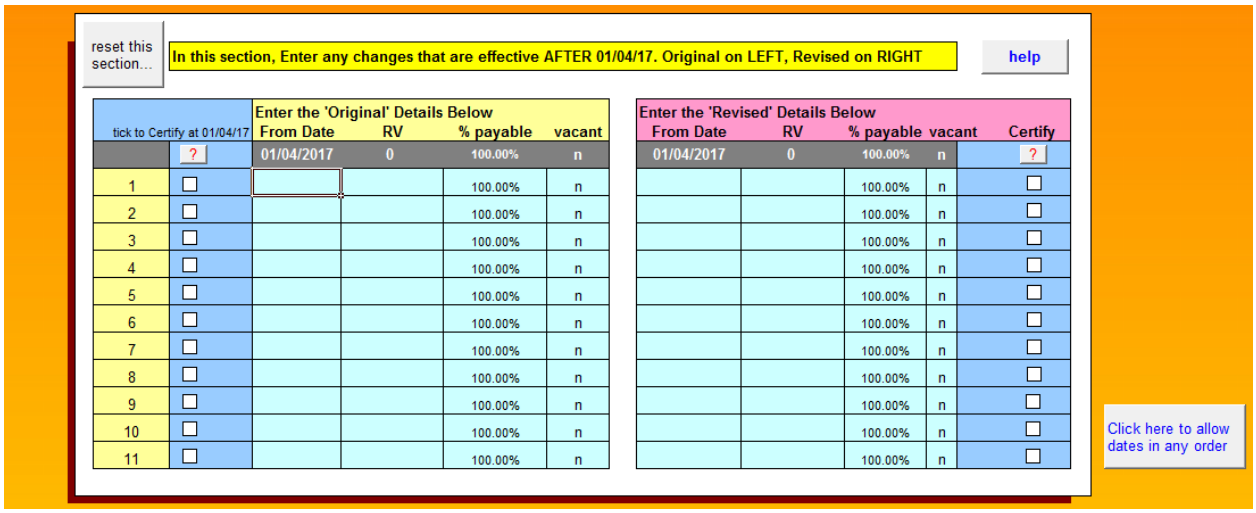
Is this **Vacant** as at 1/4/17?: If the property is vacant on 1/4/17 enter a "y"

New in list?: If there was no entry in the rating list at 1/4/17; click this button to go straight to "The Dates Section".

Remember! Each side (Left and Right) of the Advanced Calculator is independent of the other; therefore you could view the effect of gaining or losing the Charitable Relief. Similarly, you could also view the difference between occupied and unoccupied liabilities.

The Dates Section

In this section enter the details that are effective AFTER 1/4/17. If there is a sequence of dates, enter them in chronological order going DOWN the page on each side.



When entering a period of time, for example an unoccupied period from 7th June to 6th October, you must NEVER enter the dates "from and to", you must only ever enter the "from" date.

For example, if a previously occupied shop was vacant on 7th June 2017, it will be empty and exempt (i.e. 0%) **FROM** 7/6/17. If it remains unoccupied for four months, Empty Property Rate at 100% will be due **FROM** 7/9/17 and Occupied Rate (also at 100%) will be due **FROM** 7/10/17

There is no need to enter the periods as "From and To", only FROM.

The Dates Section allows you to enter:

1 - A Date
2 - The RV effective on that date (or the RV that you THINK might apply on that date)
3 - The percentage payable from that date
4 – Whether it is vacant from that date
5 – (tick box) whether the RV at that date has been (or should be) certified at 1/4/17

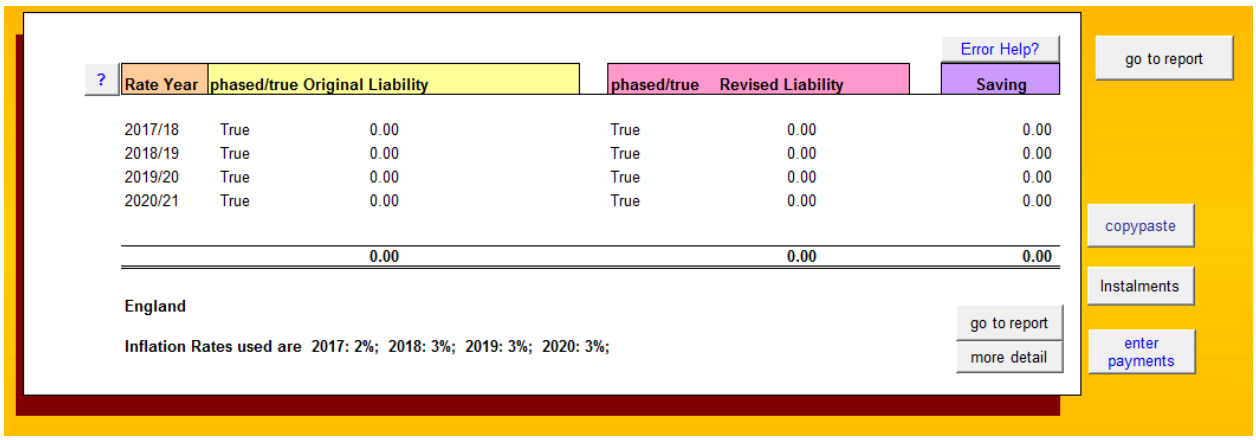
Remember that the two sides are independent of each other. The information you put on the LEFT will only affect the liability shown on the LEFT.

The information you put on the RIGHT will only affect the liability shown on the RIGHT.

Therefore, you can compare two totally different scenarios to see how it affects liability

The Results Section

This shows the liability resulting from the information you've entered.



The figures on the LEFT are the result of the information you've entered on the LEFT

The figures on the RIGHT are the result of the information you've entered on the RIGHT

The "Saving" is the difference between the two. A figure in red and in brackets indicates a negative saving, i.e. an increase.

The liability will be shown as "True" (not affected by transition) or "Phased" (affected by transition)

Other indicators may say:

"N/J" (N over J) – This indicates an RV reduction effective after 1/4/17 and affected by transition

"P + T" (Phased plus True) - This indicates an RV increase effective after 1/4/17 where the added value is not protected by transition.

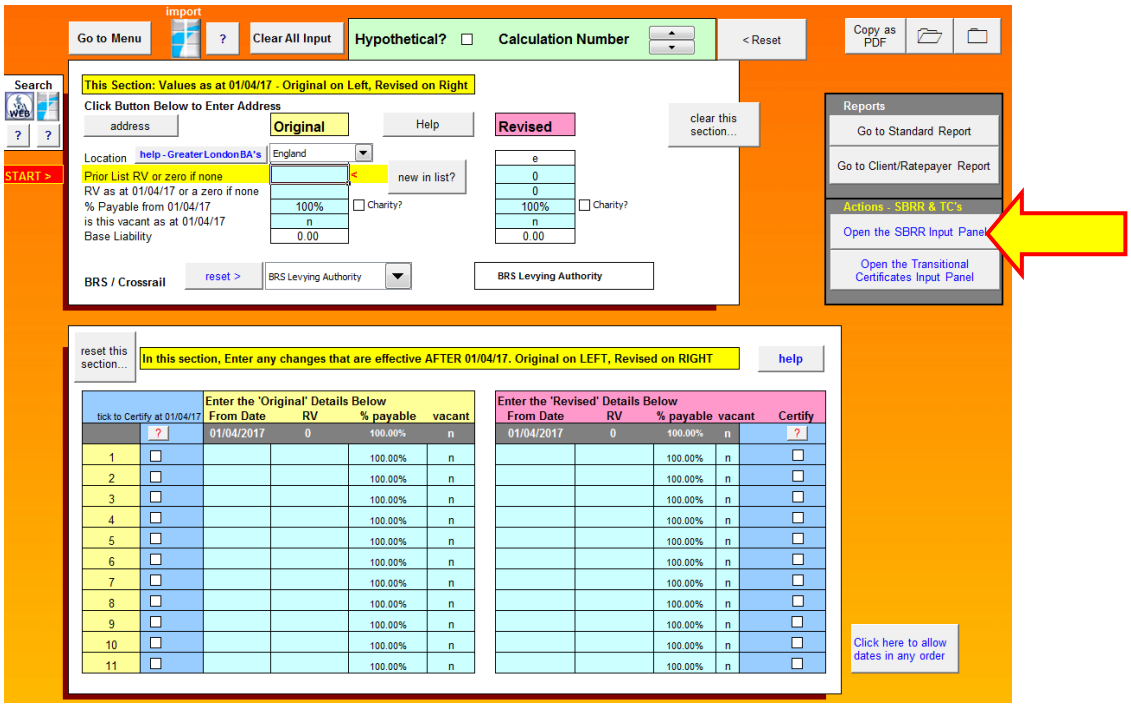
"N/J + T" (N over J plus True) – This indicates an RV reduction effective after 1/4/17 affected by transition followed by an RV increase effective after 1/4/17 where the added value is not protected by transition

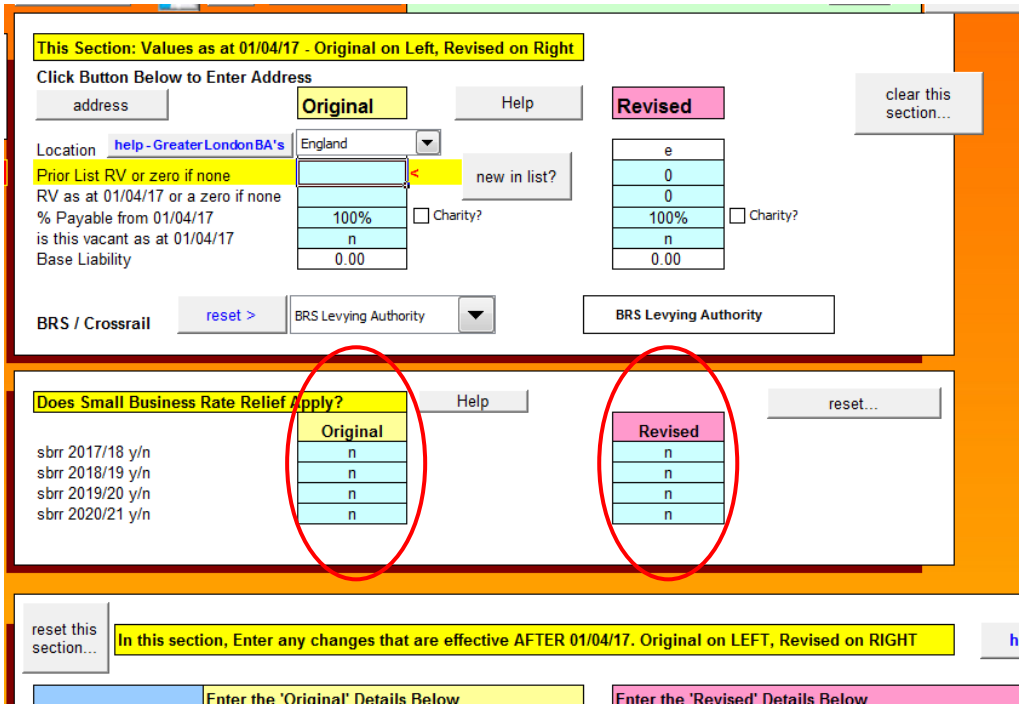
Advanced Calculator - Hidden Panels

The three main sections outlined above are always visible

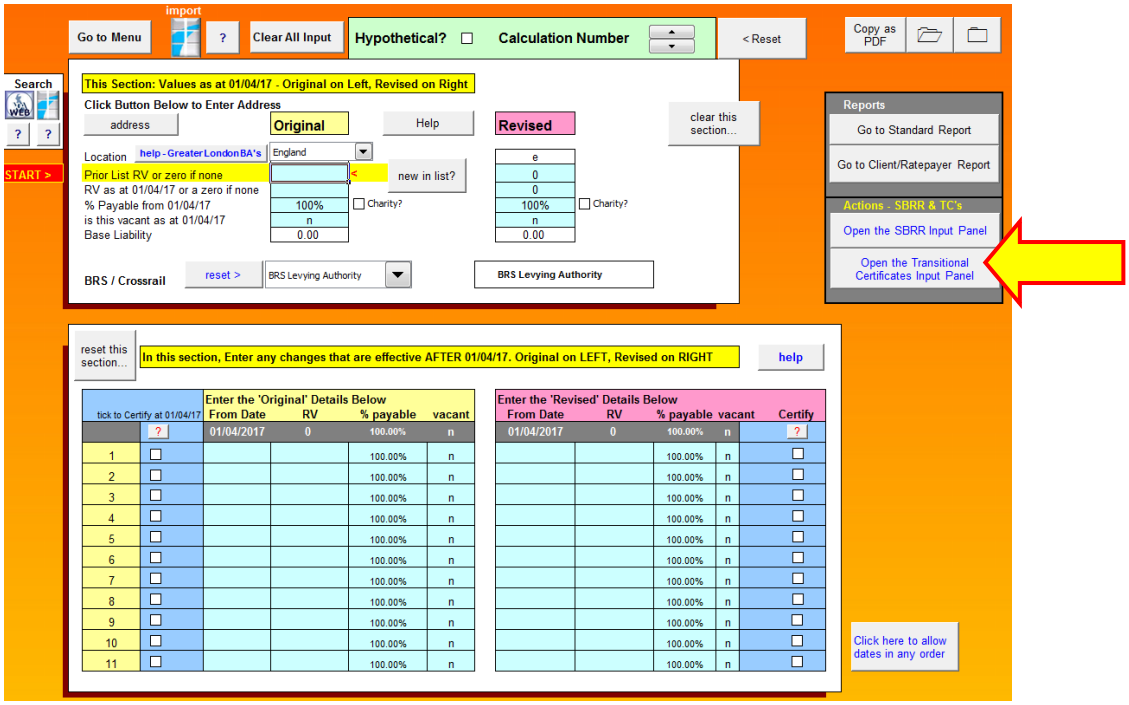
There are two others that are hidden until needed

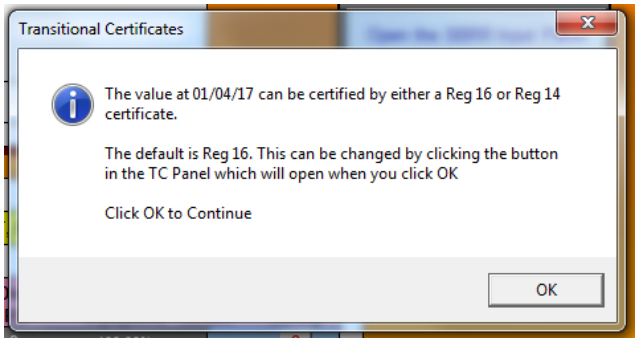
Small Business Rate Relief

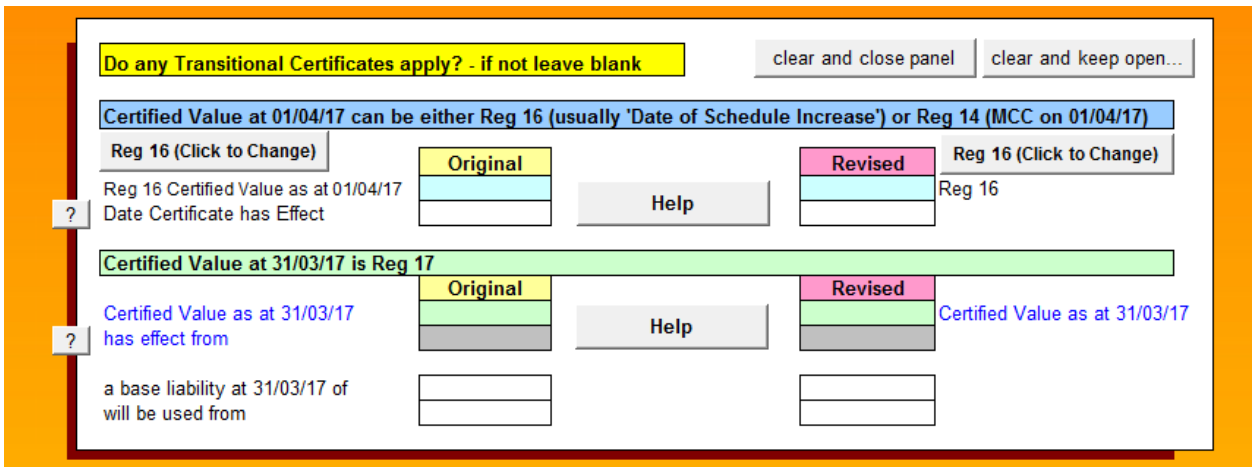




Transitional Certificates



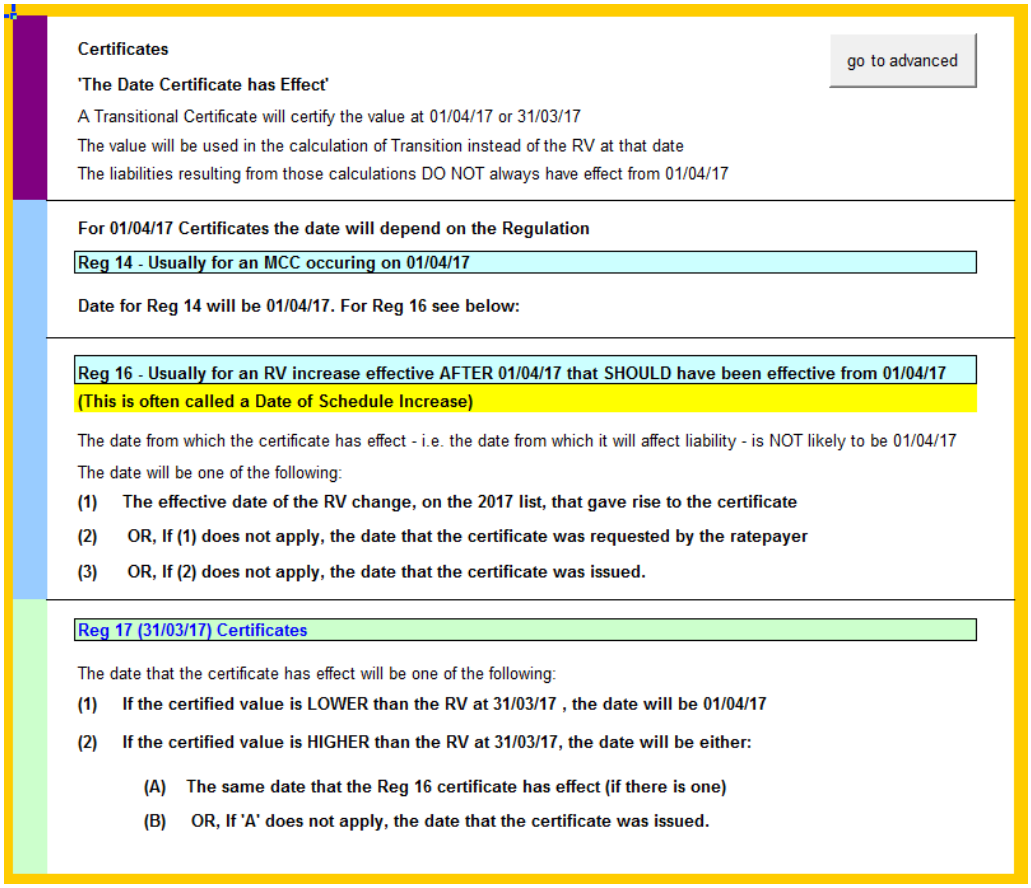




Remember! Each side is independent of the other; therefore you could view the effect of having, or not having, a Transitional Certificate. Similarly, you could also view the difference between Transitional Certificates of different values.

For help in determining the dates to use, click the “Help” button – see below

Help – Certificates



Examples and Exercises using the Advanced Calculator

Example using Dates – Empty Period of Four Months

Dates are always entered as “FROM”, not “from and to”

For example, a shop closes for refurbishment and will be empty and exempt (i.e. 0%) FROM 1/6/17

If it remains unoccupied for more than three months, Empty Property Rate at 100% will be due FROM 1/9/17

If it is occupied on 1st October 2017, Occupied Rate (also at 100%) will be due FROM 1/10/17

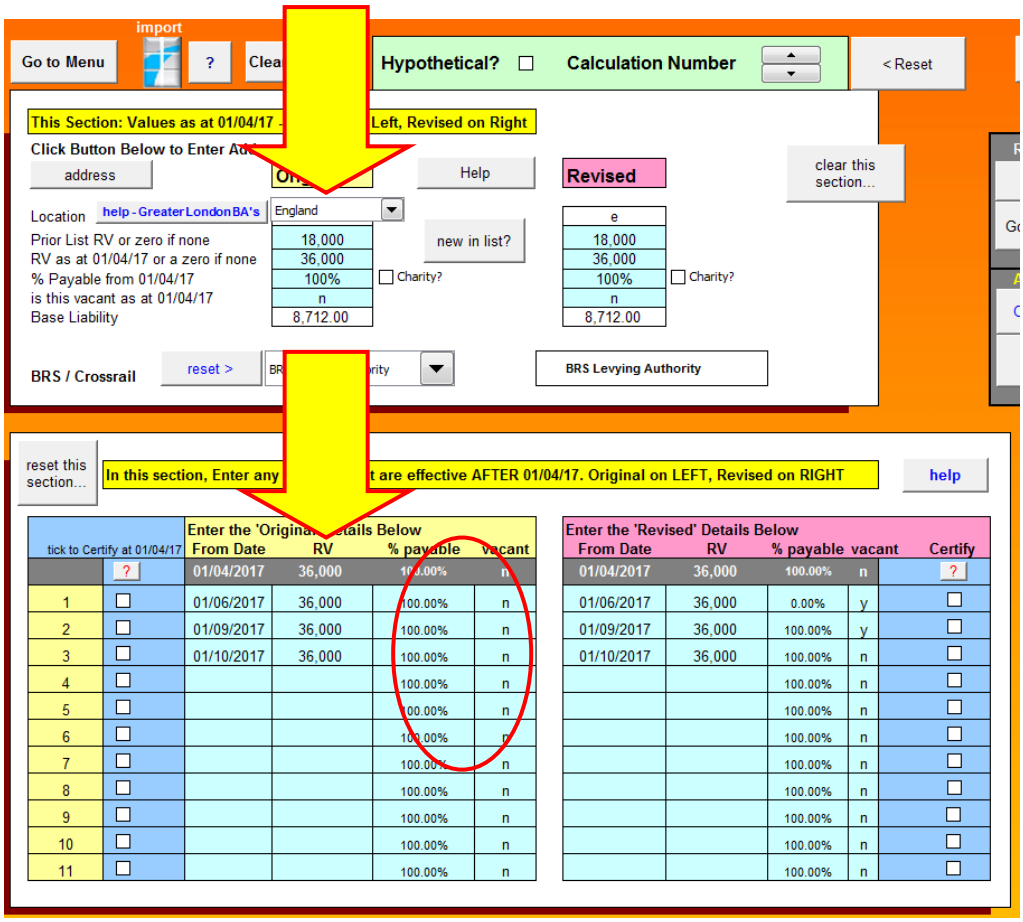
Exercise 1:

Show the saving resulting from the empty period in the example above.

The shop is not in London | The RV at 31/3/17 is 18,000 | The RV at 01/4/17 is 36,000

Method

On the LEFT, enter the Dates, RV's, Percentages, and vacant indicators as if the shop is **occupied** throughout the period in question. On the RIGHT, enter the Dates, RV's, Percentages, vacant indicators based on the example, i.e. vacant for four months from 1/6/17



Your input on the LEFT (as shown above) should be…

From 1/6/17 the percentage payable is 100 and the vacant indicator should be n

From 1/9/17 the percentage payable is 100 and the vacant indicator should be n

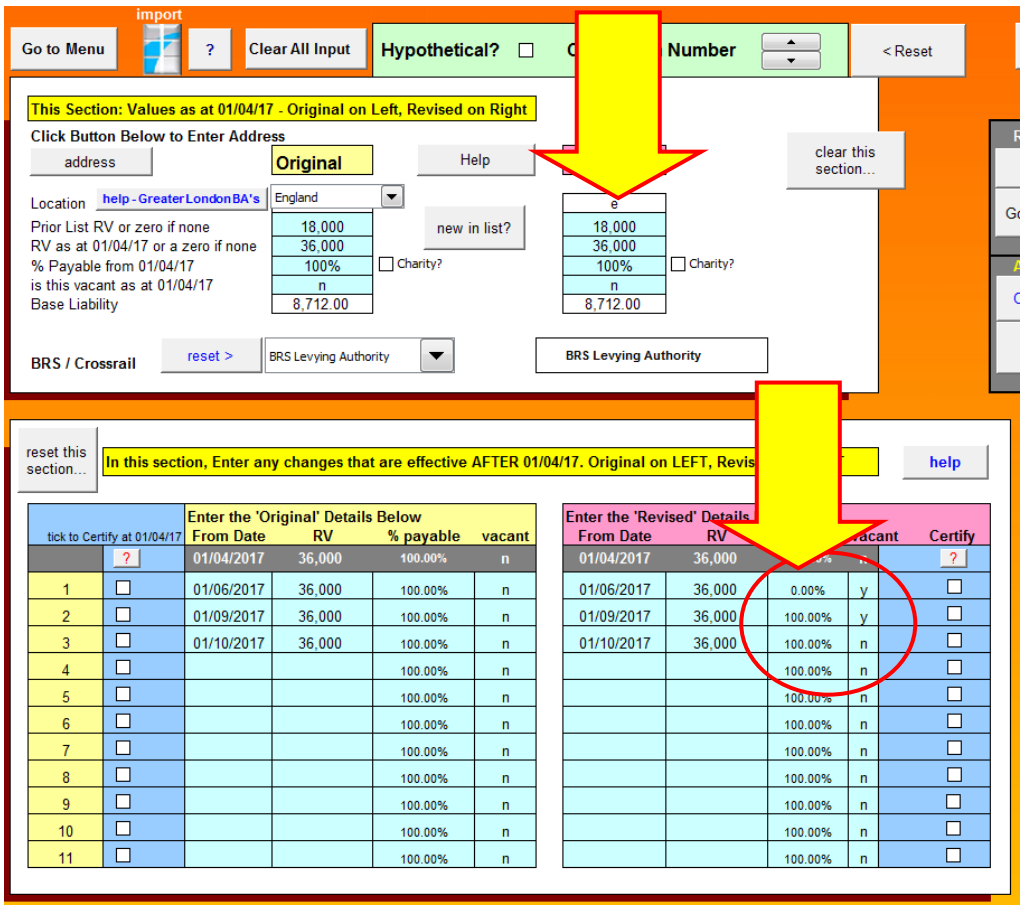
From 1/10/17 the percentage payable is 100 and the vacant indicator should be n

Your input on the RIGHT (as shown below) should be…

From 1/6/17 the percentage payable is 0 and the vacant indicator should be y

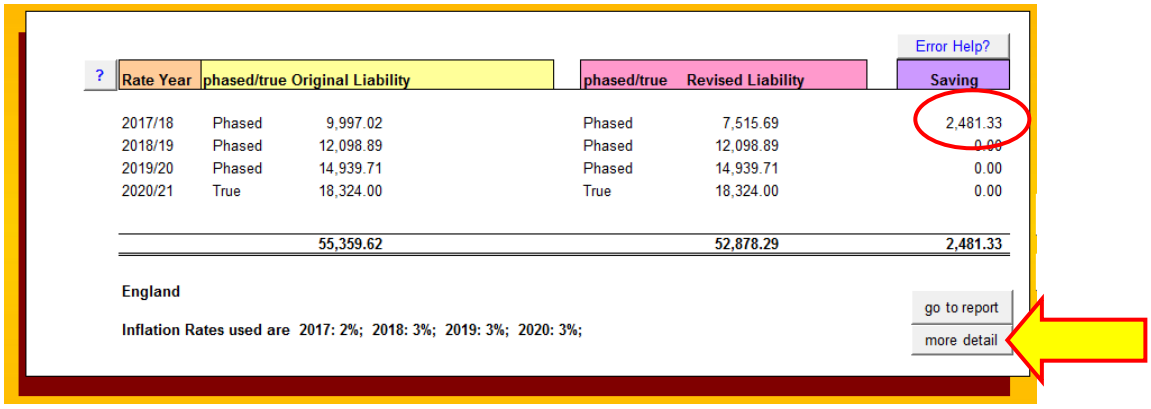
From 1/9/17 the percentage payable is 100 but the vacant indicator should still be y

From 1/10/17 the percentage payable is 100 and the vacant indicator should be n



The savings will be shown in the results section.

As you can see, there is a saving of £2,481.33



For more detail, click the “more detail” button

More Detail

Rate Liability Details

Address

England

File Ref 0

Date 15/05/2018

Original Liability

2010 RV 18,000 *Base Liability* *8,712.00*

Certified Value as at 31/03/17 is

Reg 16 Certified Value as at 01/04/17 is

Date	RV	days	Basis	Liability
01/04/2017	36,000	61	100%	1,670.73
01/06/2017	36,000	92	100%	2,519.80
01/09/2017	36,000	30	100%	821.67
01/10/2017	36,000	182	100%	4,984.82
		0	0%	0.00
		0	0%	0.00
		0	0%	0.00
Phased				**9,997.02**

Revised Liability

2010 RV 18,000 *Base Liability* *8,712.00*

Certified Value as at 31/03/17 is

Reg 16 Certified Value as at 01/04/17 is

Date	RV	days	Basis	Liability	Saving
01/04/2017	36,000	61	100%	1,670.73	0.00
01/06/2017	36,000	92	0%	0.00	2,519.80
01/09/2017	36,000	30	100%	860.14	-38.47
01/10/2017	36,000	182	100%	4,984.82	0.00
		0	0%	0.00	0.00
		0	0%	0.00	0.00
		0	0%	0.00	0.00
Phased				**7,515.69**	**2,481.33**

You can see from the More Detail page that the three month exemption is worth £2,519.80 but the following 30 days of Empty Property Rate is more than Occupied Rate. This is because , for an RV of 36,000, Occupied Rates are calculated on the Small Multiplier, whereas Unoccupied Rates are calculated using the Large Multiplier

Exercise 2

You have reported the results of Exercise 1 to your client.

They now tell you that there has been a delay and they won't open for business until a month later, i.e. 1st November 2017

This means the shop will be empty for Five months not Four. Will they save more or less?

Method: Identify the question.

The Advanced Calculator will compare TWO scenarios to show the difference, so we need to be clear as to which two scenarios we use.

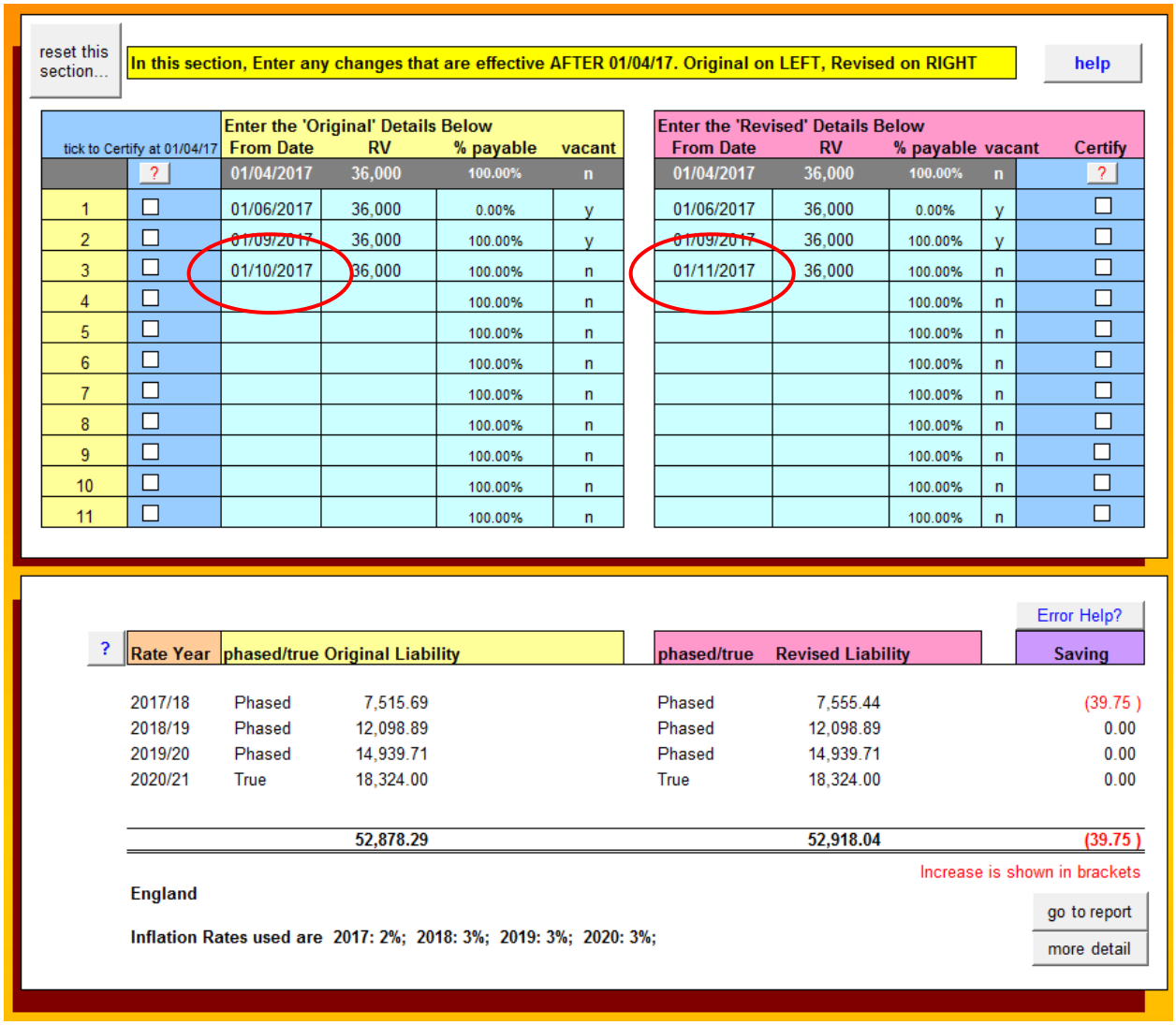
There are THREE scenarios that have been mentioned.

1 The property is occupied
2 The property is vacant for four months
3 The property is vacant for five months.

The question in this case is "what's the difference between being empty for four months, and being empty for five months"

Therefore, on the LEFT we put the details for being empty for four months, and on the RIGHT we put the details for being empty for five months.

Exercise 2 Input:



reset this section...

In this section, Enter any changes that are effective AFTER 01/04/17. Original on LEFT, Revised on RIGHT

help

tick to Certify at 01/04/17		Enter the 'Original' Details Below From Date	RV	% payable	vacant	Enter the 'Revised' Details Below From Date	RV	% payable	vacant	Certify
	?	01/04/2017	36,000	100.00%	n	01/04/2017	36,000	100.00%	n	?
1	☐	01/06/2017	36,000	0.00%	y	01/06/2017	36,000	0.00%	y	☐
2	☐	01/09/2017	36,000	100.00%	y	01/09/2017	36,000	100.00%	y	☐
3	☐	01/10/2017	36,000	100.00%	n	01/11/2017	36,000	100.00%	n	☐
4	☐			100.00%	n			100.00%	n	☐
5	☐			100.00%	n			100.00%	n	☐
6	☐			100.00%	n			100.00%	n	☐
7	☐			100.00%	n			100.00%	n	☐
8	☐			100.00%	n			100.00%	n	☐
9	☐			100.00%	n			100.00%	n	☐
10	☐			100.00%	n			100.00%	n	☐
11	☐			100.00%	n			100.00%	n	☐

Error Help?

?	Rate Year	phased/true Original Liability		phased/true	Revised Liability	Saving
	2017/18	Phased	7,515.69	Phased	7,555.44	(39.75)
	2018/19	Phased	12,098.89	Phased	12,098.89	0.00
	2019/20	Phased	14,939.71	Phased	14,939.71	0.00
	2020/21	True	18,324.00	True	18,324.00	0.00
			52,878.29		52,918.04	(39.75)

Increase is shown in brackets

England

Inflation Rates used are 2017: 2%; 2018: 3%; 2019: 3%; 2020: 3%;

go to report

more detail

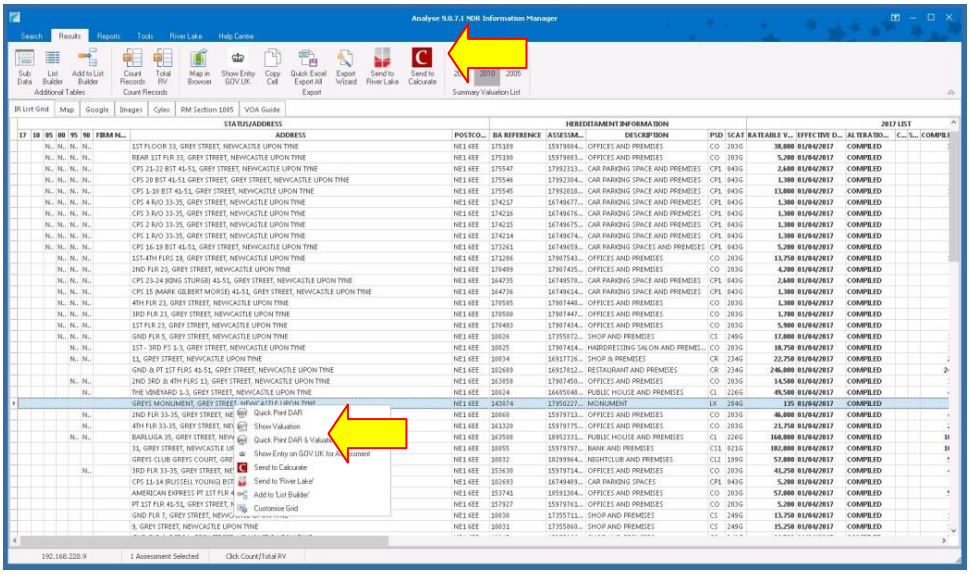
On the LEFT, the occupation date is 1/10/17, (indicated by the vacant indicator being “n”) but on the RIGHT the occupation date is 1/11/17

Therefore, being empty for an extra month will cost an extra £39.75 in Business Rates.

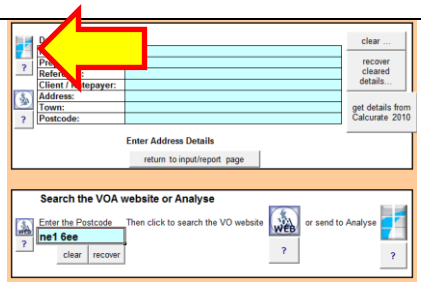
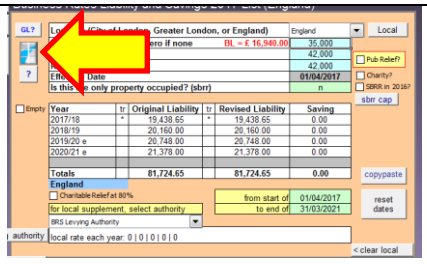
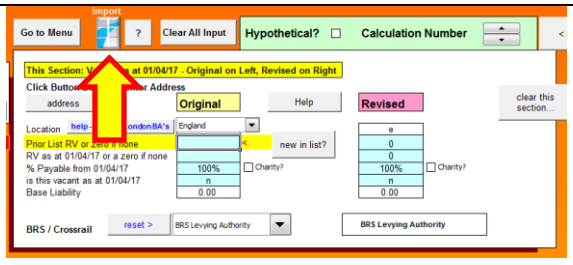
Import from Analyse

Begin by searching for the required property on Analyse. Once found, right click on the address and choose “Send to Calcurate”, switch back to Calcurate and click one of the “Analyse Import” buttons as shown below.

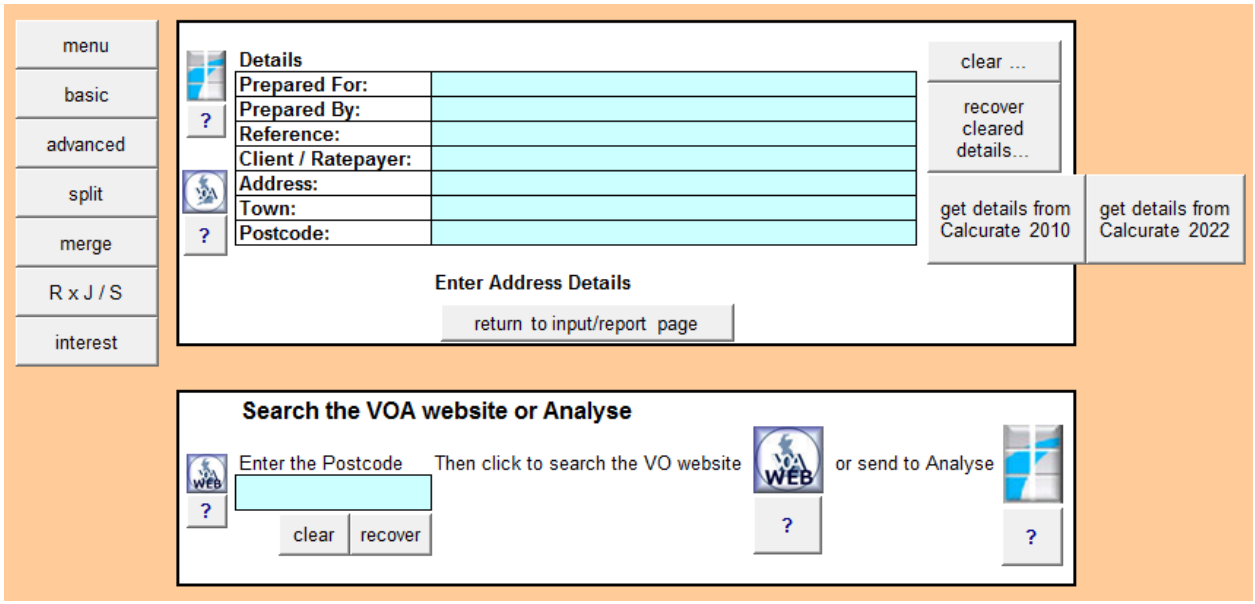
1 - Find the entry on Analyse then click “Send to Calcurate”. There are two ways to do this, you can either select the row and then click the button at the top of the screen, or you can RIGHT click on the row and choose “Send to Calcurate” from the drop down menu.



2 – Return to Calcurate and import the details from Analyse by clicking one of the import buttons shown below.

Menu Page – top right	Address Page – top left
	
Basic – top left	**Advanced – top of screen**
	

Entering the Address



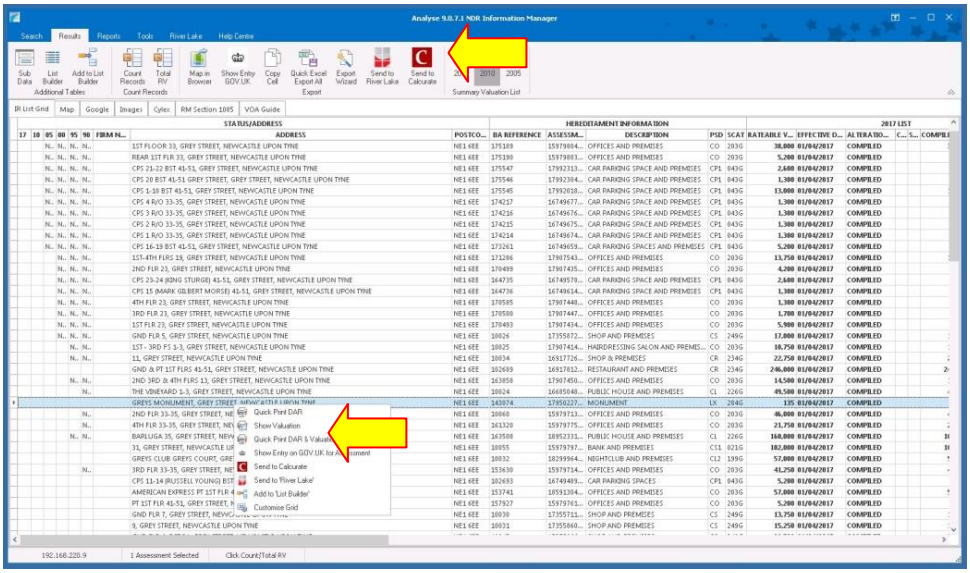
There are three ways to enter the address into Calcurate. You can:

- Receive the details from “Analyse”
- Copy from the VO website
- Type the details yourself

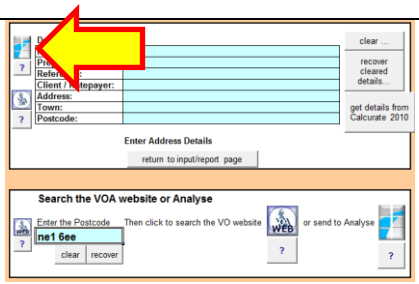
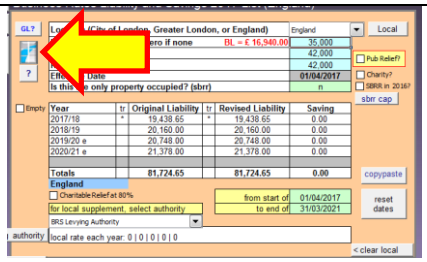
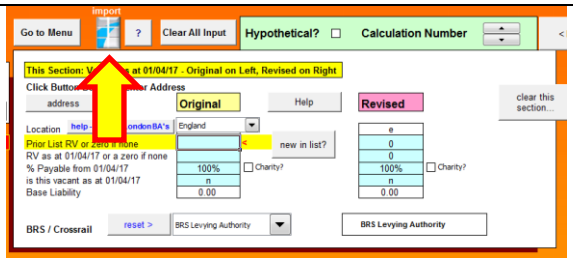
Import from Analyse

Begin by searching for the required property on Analyse. Once found, right click on the address and choose “Send to Calcurate”, switch back to Calcurate and click one of the “Analyse Import” buttons as shown below.

1 - Find the entry on Analyse then click “Send to Calcurate”. There are two ways to do this, you can either select the row and then click the button at the top of the screen, or you can RIGHT click on the row and choose “Send to Calcurate” from the drop down menu.

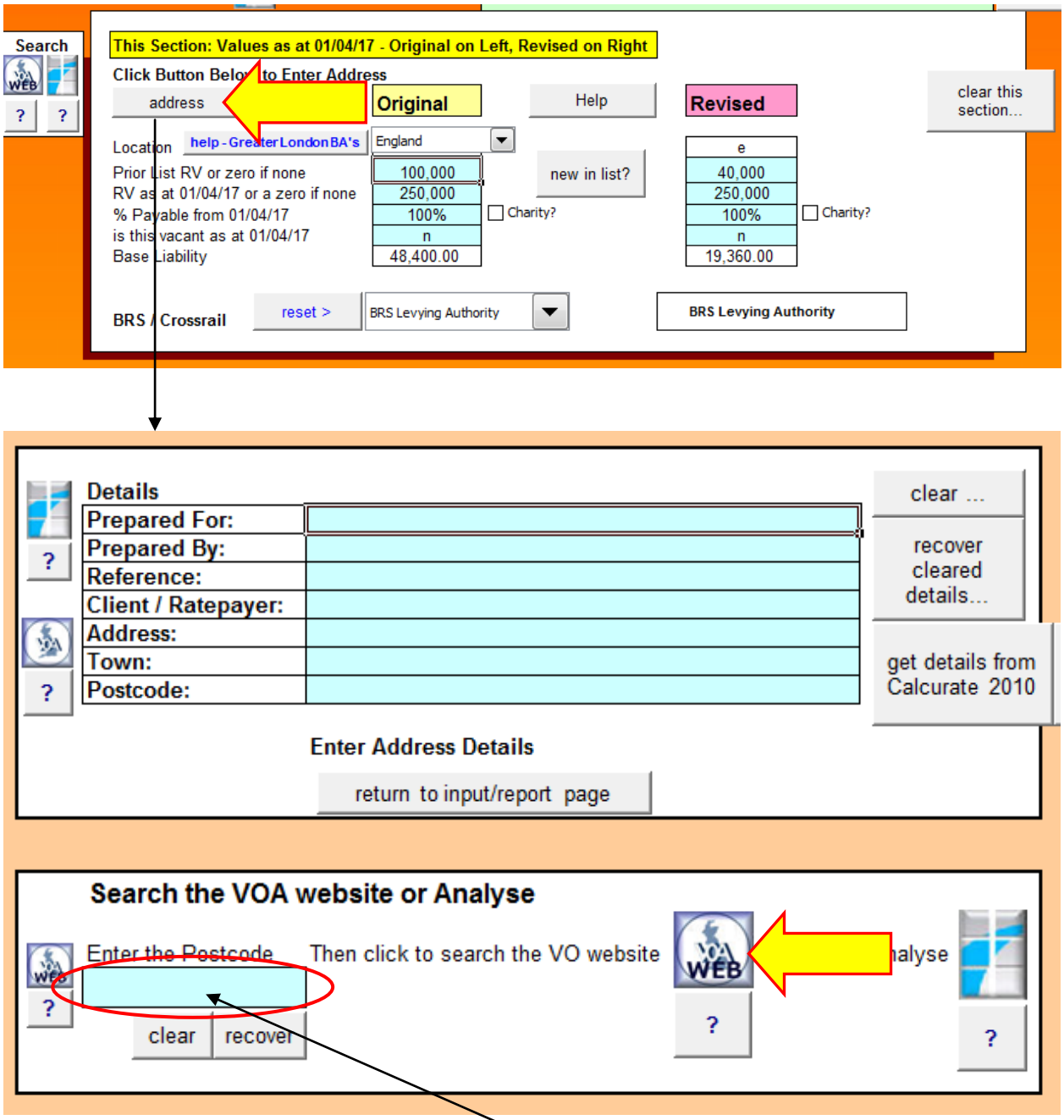


2 – Return to Calcurate and import the details from Analyse by clicking one of the import buttons shown below.

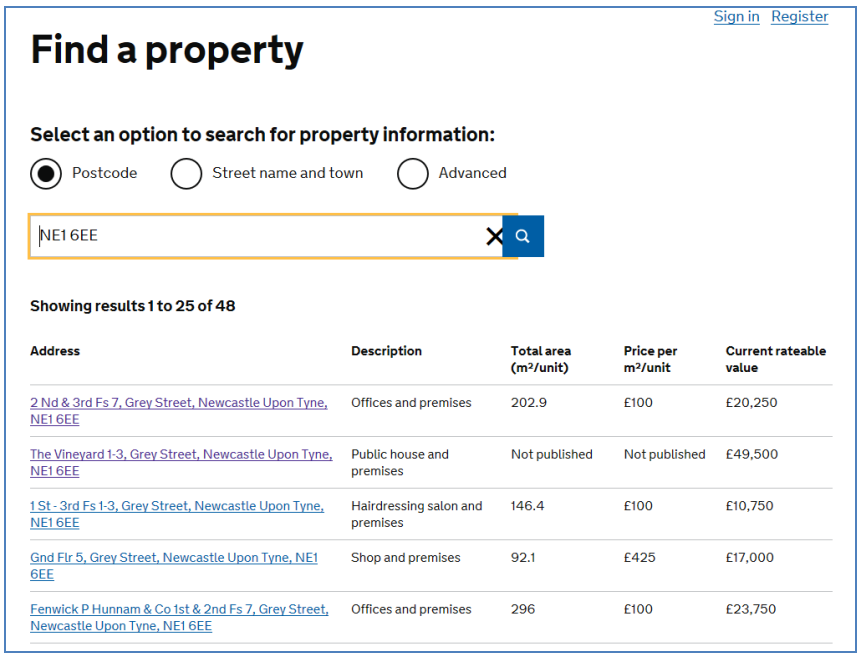
Menu Page – top right	Address Page – top left
	
Basic – top left	**Advanced – top of screen**
	

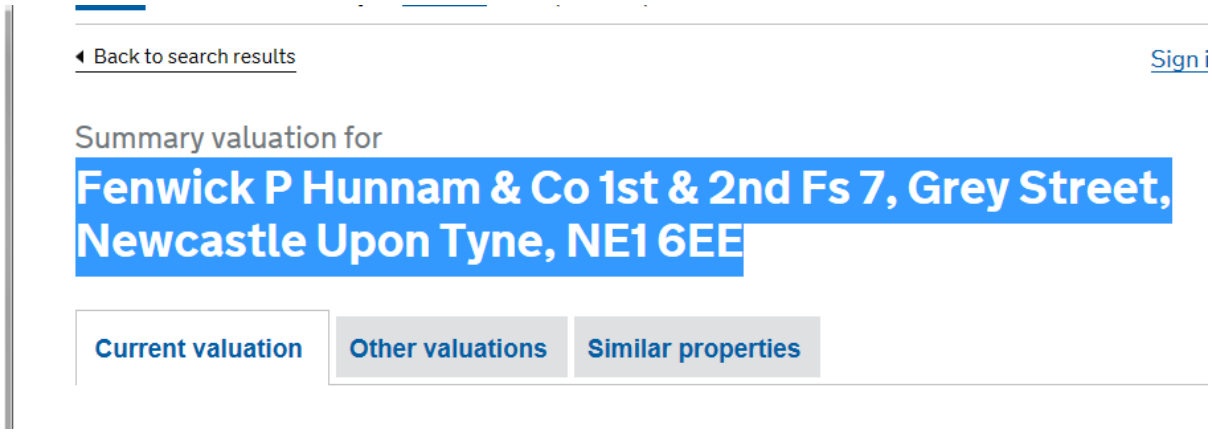
Entering the Address - Method Two: Copy from the VO website

Click the “Address” button.

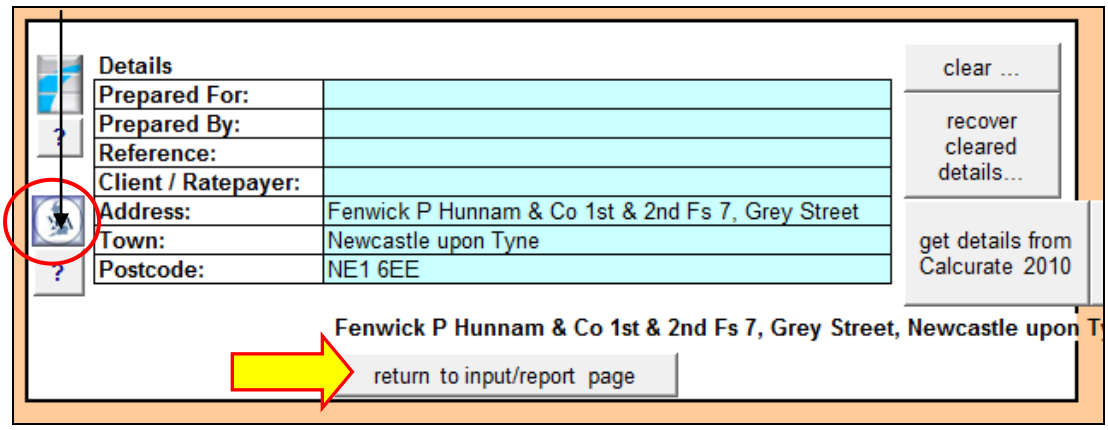


Manually type in the Postcode into the Postcode box, press enter and then click the VOA Web button. You will then be redirected to the VOA website and the search results will be displayed.



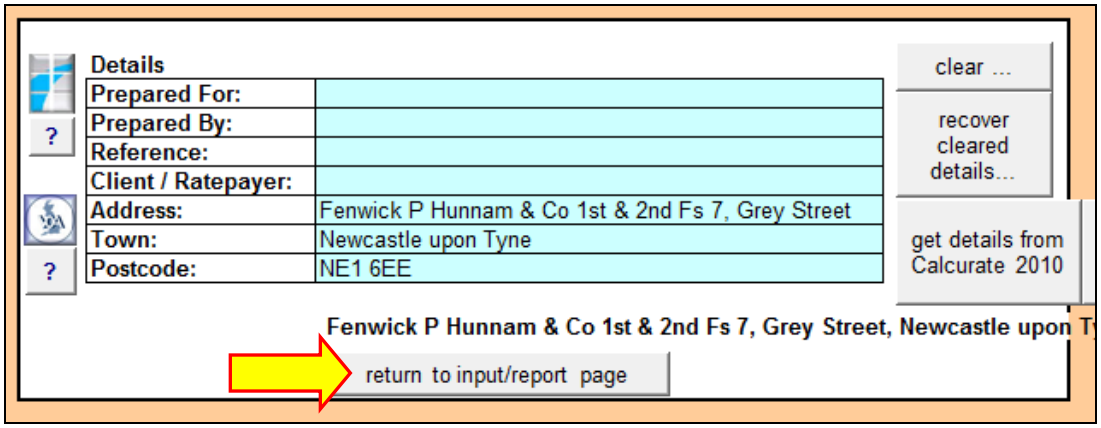


Highlight the relevant address using the mouse, then right click and select “copy”. Switch back to Calcurate and click the VO Address button. Then click “return to input/report page”

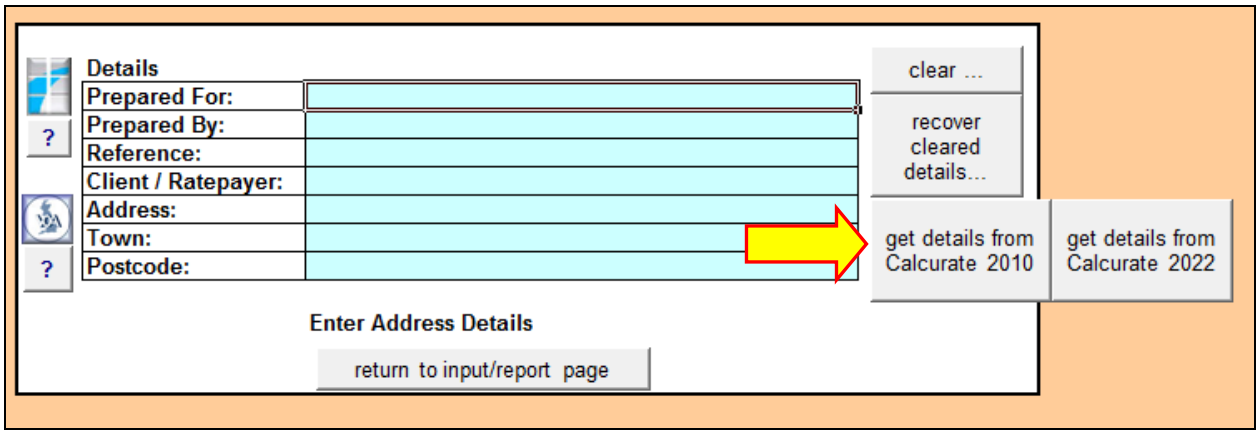


Entering the Address - Method Three: Manual Entry

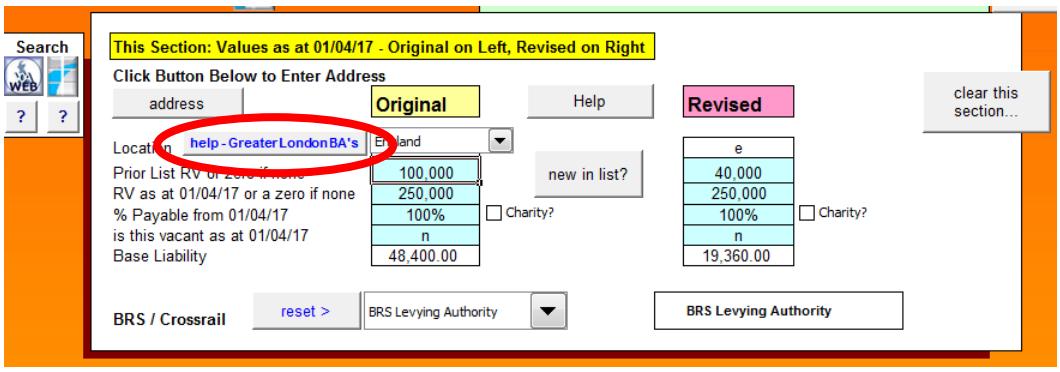
Enter the relevant address lines into the appropriate boxes on the page and click “return to input/report page” once complete.

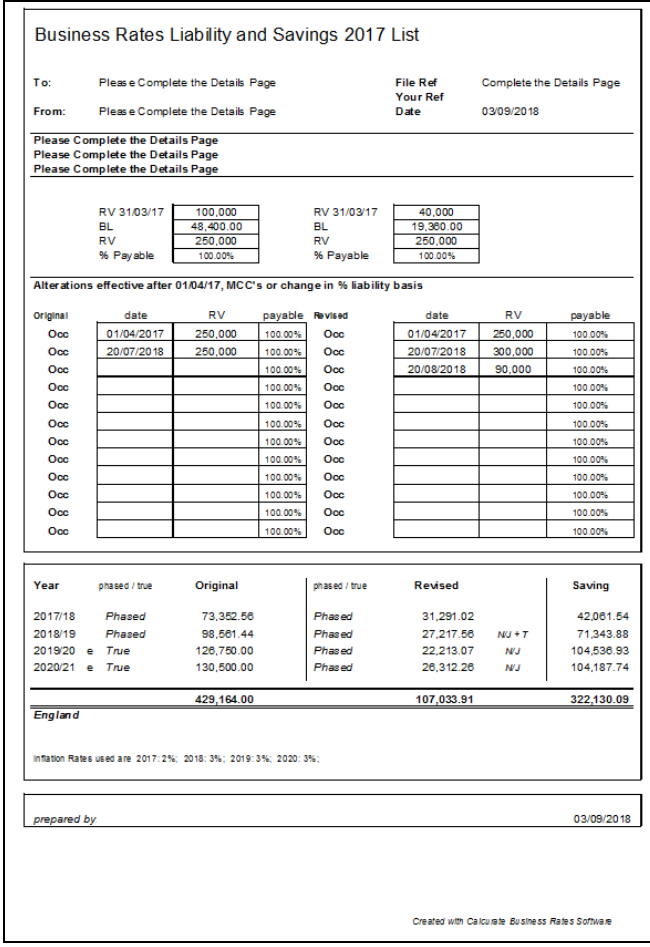
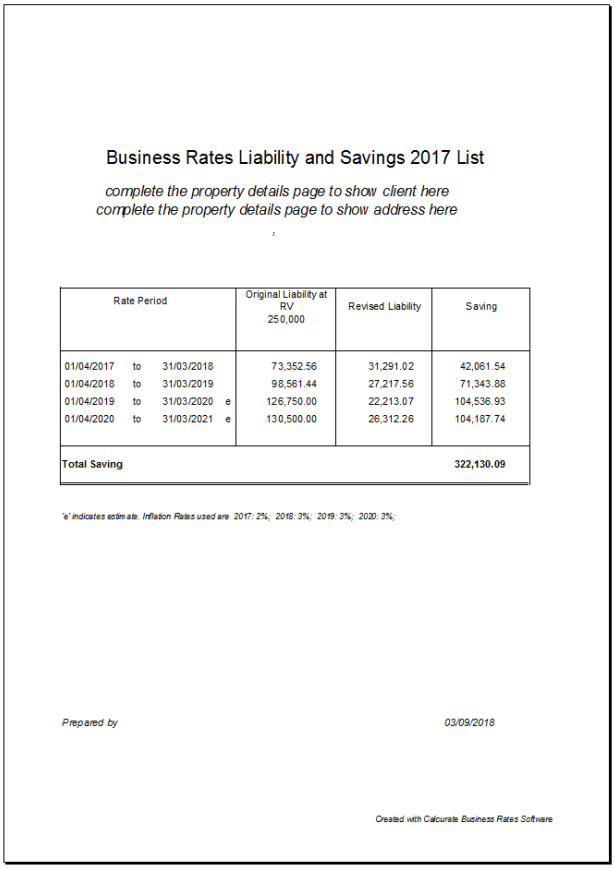


If you have already entered the address details into Calcurate 2010, you can click the button shown below



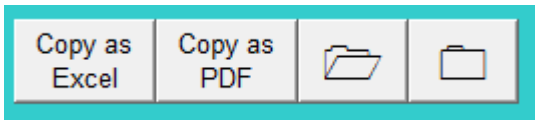
London Borough's: If in doubt as to whether a billing authority is in Greater London or not, clicking the "GL" button will display a list of all London Borough's. The buttons at the top of the GL Page will change the selected location if required.

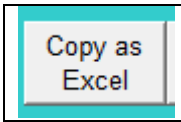
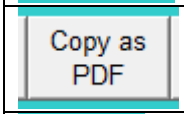
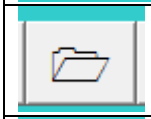
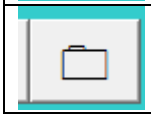


Standard Report – More Detail	Client Report – Less Detail
	

Can I copy the report to attach to an email?

Many of the pages within Calculate contain the buttons shown below:



	"Copy as Excel" This will create a single excel sheet excel file within your "Saved Calculations" folder. The copy will have NO FORMULAS, therefore changing the RV or dates within the sheet will not update the values.
	"Copy as PDF" This creates a single page PDF file within the "Saved Calculations" folder.
	Open the Saved Calculations folder
	Set the location of the Saved Calculations folder and how the PDF feature will function.