



TIPS 'N TRICKS

Save time building the Assessment Notice file

(Reports | Batch Reports | Appraisal | Assessment Notices)

As you work through the Assessment Roll Closeout process you will finalize values, run exception reports, and build the assessment notice file that is used for printing.

The file is not built all at one time.

You'll be submitting a job for each property type and occupancy:

- real occupancy
- real non-occupancy
- mfg occupancy

- mfg non-occupancy
- personal

You don't have to wait to submit them all at one time. For example, if your personal property is ready but you are still working on real property exception reports, go ahead and submit the personal to build and cross that one off your to-do list.

Just remember that you only "Clear Files" when you submit the first build for

the primary roll. It doesn't matter what you submit first, just don't clear the file when you build the other property types and occupancies.



CIRCUIT BREAKER

- **Request File from Tax Commission**
As soon as you are finished entering Circuit Breaker applications on the STC website, you need to request your county's file from them. When you receive the file, contact us if you need help importing it.

- **Get Values**
When you have values finalized, you'll need to update CB values before you start editing and changing CB information. NOTE: Once you start editing values, do NOT run the update CB values program again without contacting CAI Property Support.

New Construction Roll

Tools | Batch Processing | Assessor | New Construction

Another important project this time of year is the New Construction roll. Tracking new construction values manually can be a time consuming project. The Property system has both batch and manual processes for capturing new construction values.

You'll need to be finished with value changes before you run the build process and start editing, so once you've built assessment notices, you could submit the new construction roll and get started.

The batch program will look through your data to find values that may qualify as new construction based on predefined circumstances. It will generate a roll that you would then review and edit as needed.

It is very important that the results of the batch process be checked and verified each time it is run. You should never accept the results of the batch process without doing so. Even though it uses computer-generated data, the contents of the roll are the responsibility of the county.

While the batch process attempts to find as much as possible, there are circumstances that we are not able to pick up with programming. These require manual entry to get them on the new construction roll.

As a general rule, the following steps outline the new construction roll process. Each step is explained in detail in the documentation available on our website at www.gocai.com.

1. Run the batch process to build a new roll
2. Review each entry and edit or delete as needed
3. Manually add entries to the roll as needed
4. Generate the preliminary new construction roll
5. Manually add, edit and/or delete entries as needed
6. Generate the final new construction roll

Did You Know...

When your values are finalized, you can use the assessment balancing report and/or a preliminary abstract to help find potential problems?

Reports | Batch Reports | Appraisal | Assessment Balancing Tools | Batch Processing | Auditor | Process Abstract

Compare the values to last year's final abstract and see if the results are what you expected (values, acres, HOE amounts, UR values, etc.).

Who You Gonna Call?

When you send requests for help to our CAI Property Support email address (property@gocai.com), your message goes to an inbox that is monitored by Becky, Brett and Rob.

It helps us respond quickly to your issue, rather than having messages in one of our inboxes or voicemail while we're on the phone or out of the office.

