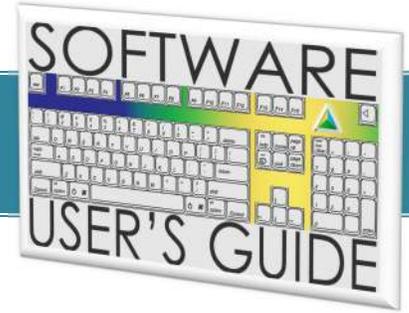


# PROPERTY

PROPERTY & TAX MANAGEMENT SYSTEM

Version 07.01.00.01



## COPY PROCESSING

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# 1. OVERVIEW

CAI Property is year-based, meaning each property year requires a separate set of parcels, characteristics and tables. It allows for easy access to historical data, and gives users a head-start on future work by letting them get started on a new year while work continues in the current year. Each new year starts with data copied from the previous year.

As assessments are completed, each roll gets locked down to prevent unintended changes and ensure that taxes are calculated on what was actually assessed. When a roll is closed, it becomes read-only to most users. Advanced users who have been granted a high level of authority are able to make changes if the need arises.

Data on closed rolls is then copied forward, once after primary assessment rolls and again after both subsequent rolls are done.

## 1A. Years

To avoid confusion, this document uses “current year” to refer to the property year data is being copied from, and “next year” as the property year it is copied to.

## 1B. Parcels

Most parcels are copied during the Primary Copy. This includes all real, manufactured home and personal property parcels with an Active status. This is the only time that real property parcels are copied forward.

Manufactured home and personal property parcels created after the Primary Copy (for subsequent roll use) are copied during the End-of-Year (EOY) Copy.

## 1C. Characteristics

The Primary Copy also takes care of all Active status characteristics assessed on the primary roll, with the End-of-Year Copy picking up those on either subsequent roll. Occupancy roll characteristics will be changed to non-occupancy in the next year, regardless of which copy process they are included in. Subsequent roll characteristics will change to the primary assessment roll in the next year, with the exception of transient personal property. They will remain on the same roll they were on.

Characteristics with a Never Occupied status are not included in the Primary Copy since they may still be needed on a subsequent roll. The End-of-Year Copy will copy any that remain with this status after all rolls are completed.

## 1D. After Copying

Users need to be aware that a new property year has been created so they know what year to be working in. Some work will still be done in the current year and some in the next year.

Appraisers can begin working in the next year as soon as the Primary Copy is done. They will continue to work in the current year for subsequent roll appraisals. Assessment corrections may require updating in both years, depending on the method used to make corrections.

Occasionally, a new parcel will be created in the next year, typically as the result of a split or plat, and the appraisers need to assess it on one of the current year occupancy rolls (a new house becomes taxable

after the primary roll, for example). When that happens, an option is available on the next year's parcel to create an occupancy parcel in the current year.

Some land records work will be done in the current year and some in the next year (splits, combinations, etc.). Ownership changes and sub roll work are always made in the current property year. Most other changes are typically made in the next year.

**NOTE** Ownership changes must be done in the property year they were recorded in. Ownership changes made in the current year after the Primary Copy will automatically update the next year as well.

1E.

## Processing Mode

When a procedure has to deal with a lot of data and may take quite a while to run, you are given the option to either run it immediately or in batch mode later in the day. The following information will help you decide which option is best for your situation.

### Run in Batch

---

With this option, the job is submitted to run in the evening when there is less going on so it can process faster. In addition, it runs on the file server rather than a workstation so it is less likely to encounter any issues that might prevent it from finishing. When the batch program starts, it processes jobs in the order that they were submitted. As a general rule, jobs submitted one day should be completed by the next morning.

**NOTE** Any process identified as "Critical" should be submitted to batch rather than being ran immediately unless instructed otherwise by CAI support staff.

### Run Immediately

---

When this option is selected, processing will begin immediately on the workstation you are using. A message will display when the job has finished. The Property instance used to start the job cannot be used for anything else until it finishes. The workstation can be used for other tasks while the job runs, but its performance will be reduced during that time.

**NOTE** The Property application and/or workstation may appear to be locked up or "Not Responding." That simply means that it is too busy working on the job to communicate with you.

**Until you see the message telling you the job is done, do NOT close the Property instance used to start the job and do NOT reboot or shut down the workstation. Once it is started it MUST be allowed to completely finish.**

## 2. TIMELINE

### 2A. Primary Copy

#### Late May to Mid-July

##### ***Tables***

Assessment year tables can be copied any time after primary roll values and exemptions are finalized for all property types. Rolls do not have to be closed but you need to be reasonably certain that you won't be making any more table changes. Changes in the current year tables after they have been copied must be done in the next year as well.

##### ***Parcels & Characteristics***

Real property, manufactured homes and personal property are typically done soon after primary rolls are closed and assessment notices are ready to be mailed (intended method). However, some users wait until after the Board of Equalization has completed their business and all updates have been done (alternate method).

 *Refer to Assessment Corrections documentation (Intended Method and Alternate Method sections) if you need explanations of each option.*

#### October / November

##### ***Tax Certifications***

The primary roll tax certifications can be copied any time after they are finalized. However, it is recommended that the primary roll tax charge processing be completed before copying.

### 2B. End-of-Year (EOY) Copy

#### December / January

##### ***Parcels & Characteristics***

Real property, manufactured homes and personal property are typically done soon after both subsequent rolls are closed and assessment notices for the final roll are ready to be mailed (intended method). However, some users wait until after the final roll's Board of Equalization has completed their business and all updates have been done (alternate method).

 *Refer to Assessment Corrections documentation (Intended Method and Alternate Method sections) if you need explanations of each option.*

##### ***Personal Property Exemptions***

Personal property exemptions are typically copied at the same time as the end-of-year personal property parcels and characteristics (see Parcels & Characteristics above).

##### ***Parcel Exemptions***

Counties that use the Exempt Parcel module to process exemptions requiring annual approval by the Board of Equalization can copy parcel exemptions any time after both subsequent rolls are closed.

 December/January**Continued*****Tax Certifications***

---

Each subsequent roll' tax certifications can be copied any time after they are finalized. However, it is recommended that certifications for a roll not be copied until that roll's tax charge processing is complete.

Some users copy tax certifications after each roll. Others wait until after the second subsequent roll to copy both first and second roll certifications.

 January***Year-End Ownership***

---

This copy should be done as soon as possible after December 31 of each year. However, since ownership changes are processed in the same property year that they are recorded in, it may take some time to get them all done. Every effort should be made to finish ownership changes in a timely manner so this copy can take place.

Year-end ownership data is critical to the HOE process. Exemptions may not calculate correctly on parcels with completed ownership changes in the next year if they are calculated before this copy is done.

# 3. PRIMARY COPY

## 3A. Copy Tables

 *Tools | Batch Processing | Assessor | Copy Processing | Copy Assessment Year Tables*

Several year-based tables are copied from year to year. By copying them after the current year's primary roll, the next year starts off right where the current one ends. As you work in the next year, tables are updated as needed and then copied on to the following year.

Some tables must be copied each year while others are optional. However, as a general rule, you should copy all tables unless you have a definite need to start with an empty table. This should only be done after consulting with CAI support and having a full understanding of the impact of doing so.

### Required Tables

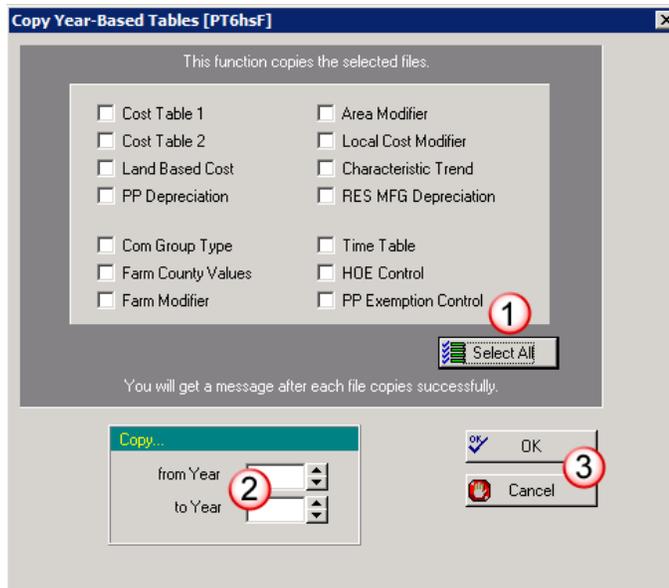
- Cost Table 1..... Residential and manufactured home cost table 1
- Cost Table 2..... Residential and manufactured home cost table 2
- PP Depreciation..... Personal property depreciation
- Farm County Values ..... Speculative factors for abstract reporting
- Time Table..... Assessment roll control table
- HOE Control ..... Homeowner's Exemption (HOE) control table
- PP Exemption Control ..... Personal Property Exemption (PPE) control table

### Optional Tables

- Land Base Cost ..... Farm and/or land base cost codes and rates
- Area Modifier ..... Modifiers applied based on land groups
- Local Cost Modifier ..... Residential and/or manufactured home modifiers based on construction class
- Characteristic Trend ..... Modifiers applied based on user-specified criteria
- Res/Mfg Depreciation ..... Residential and/or manufactured home physical depreciation factors
- Comm Group Type ..... Not typically used but no harm in copying it
- Farm Modifier ..... Modifiers applied based on farm neighborhoods

### □ STEPS

1. Select Tables ..... Click Select All (recommended) or select individual tables to be copied
2. Years..... Enter From (current) and To (next) property years
3. Process ..... Click OK to continue, Cancel to exit





4. Continue..... Click Start Batch Copy to continue, Cancel to exit
5. Messages..... Each selected table will copy one at a time

If data already exists for the table being processed, a message will display alerting you. Click Yes to overwrite existing records, No or Cancel to keep existing records and skip to next table.

Refer to the following for an explanation of the color codes and messages for this process.



- A. Red ..... Table did not copy
  - No Existing From..... The table being copied did not contain any records in the year being copied from. This is okay if the table was not populated and used in the prior year. If you do not know if it was populated, go to the table that generated the error and check for entries for the year you are copying from. If the table has records for that year, contact CAI Help Desk for assistance.
  - To Year Exists..... The table being copied already contains records in the year being copied to and you chose to keep those existing records rather than replace them with data from the prior year
- B. Blue ..... Table copy completed successfully
- C. Gray..... Table was not selected for copying; no action was taken
- D. Green ..... Table is currently being copied
6. Done..... The process is complete when all tables are either gray (not selected) or display a red or blue message. Click Cancel button to exit.
  - Do not close this panel if any table is green and displays the "Copying" message

## 3B. Copy Parcels & Characteristics

This process is made up of two separate copies (Copy Real & Manufactured and Copy Personal Property). It does not matter what order they are done in. If time permits, consider submitting each of them on a different day.

### 3B1. *Personal Property*

 *Tools | Batch Processing | Assessor | Copy Processing | Copy PP Primary*

- All personal property parcels with Active status in the current year will copy, provided that the parcel number does not already exist (with any status) in the next year.
- All characteristics on personal property parcels' primary roll with Active status in the current year will copy, provided that the next year does not already have a characteristic with the same type (personal) and suffix.

#### STEPS

1. Exception Report..... Deal with pre-copy exceptions  
 *Refer to Exceptions on page 5-1 for instructions and explanations*
2. Closed Rolls ..... The following rolls must be closed
  - Personal Property ..... Primary Roll; Non-Occupancy
3. Copy Process ..... Copy PP Primary
  - Year ..... Enter From (current) property year
  - Continue ..... Click OK to continue; Cancel to exit
  - Processing Mode ..... Critical Process – Run in batch mode
    - *Refer to Processing Mode on page 1-2 for help selecting a processing mode*
4. Exception Report..... Deal with post-copy exceptions after copy has completed  
 *Refer to Exceptions on page 5-1 for instructions and explanations*

### 3B2. *Real & Manufactured*

 *Tools | Batch Processing | Assessor | Copy Processing | Copy Real-Mfg Primary*

- All real and manufactured home parcels with Active status in the source year will copy, provided that the parcel number does not already exist (with any status) in the next year.
- All characteristics on real and manufactured home parcels' primary roll with Active status in the current year will copy, provided that the next year does not already have a characteristic with the same type and suffix.
- Characteristics on the current year's primary occupancy roll will be changed to non-occupancy and calculate at full value in next year. If they have Homeowner's Exemption in the current year, the land characteristic in the next year will be flagged for the exemption.
- Characteristics with Never Occupied status are not included in the Primary Copy process. Since they could still become taxable in the current year and be assessed on a subsequent roll, they are included in the End-of-Year Copy.

#### STEPS

1. Exception Report..... Deal with pre-copy exceptions  
 *Refer to Exceptions on page 5-1 for instructions and explanations*
2. Closed Rolls ..... The following rolls must be closed before continuing
  - Real Property ..... Primary Roll; Occupancy and Non-Occupancy
  - Manufactured ..... Primary Roll; Occupancy and Non-Occupancy
3. Copy Process ..... Copy Real-Mfg Primary
  - Year ..... Enter From (current) property year
  - Continue ..... Click OK to continue; Cancel to exit
  - Processing Mode ..... Critical Process – Run in batch mode
    - *Refer to Processing Mode on page 1-2 for help selecting a processing mode*
4. Exception Report..... Deal with post-copy exceptions after copy has completed  
 *Refer to Exceptions on page 5-1 for instructions and explanations*

## □ UPDATE CHARACTERISTICS

The following steps can be completed any time after the Real & Manufactured copy above has finished. As you run each of these steps, make sure you update the newly-created property year, not the year you copied from.

1. Land Base Cost ..... This process will batch update land base cost records on farm and land characteristics in the newly-copied property year
  -  *Tools | Batch Processing | Assessor | Update Land Base Cost Values*
  -  *Skip this section if you do not use land base cost tables to appraise farm and/or land characteristics*
  - Year ..... Enter next (copied TO) property year
  - Assessment Roll ..... Select Primary roll
  - Continue ..... Click OK to continue; Cancel to exit
  - Processing Mode ..... Click Yes to run in batch overnight; No to run locally; Cancel to exit
  -  *Refer to Processing Mode on page 1-2 for help selecting a processing mode*
2. Characteristic Values ..... This process will update characteristic value records for all types except personal property (values for personal property are calculated when declarations are built, returned and/or estimated)
  -  *Tools | Batch Processing | Assessor | Update Characteristic Values*
  - Property Year ..... Enter next (copied TO) property year
  - Characteristic Types ..... Select types and rolls to update
    - *Commercial* ..... *Primary roll*
    - *Farm* ..... *Primary roll*
    - *Land* ..... *Primary roll*
    - *Manufactured* ..... *Primary roll*
    - *Residential* ..... *Primary roll*
  - Continue ..... Click OK to continue; Cancel to exit. If you continue, complete the following for each type selected above:
    - *Verify* ..... *Read verification message and click Yes to continue; No or Cancel to skip to next type without processing*
    - *Mode* ..... *Click Yes to run in batch overnight; No to run locally; Cancel to skip to next type without processing*
  -  *Refer to Processing Mode on page 1-2 for help selecting a processing mode*
3. Homeowner's Exemption (HOE) ... Calculate HOE amounts
  -  *Tools | Batch Processing | Assessor | Establish HO Exemptions*
  - Year ..... Enter next (copied TO) property year
  - Assessment Roll ..... Select Primary roll
  - Continue ..... Click OK to continue; Cancel to exit
  - Processing Mode ..... Click Yes to submit to batch; No to run locally; Cancel to exit
  -  *Refer to Processing Mode on page 1-2 for help selecting a processing mode*

3C.

# Tax Certifications

Tax certifications can be copied any time after the tax charge is finished for the roll the certification is on.

## □ STEPS

1. Certification Summary ..... Print the following report



*Tools | Table Maintenance | Auditor | Tax Certification | Click Print icon*

- Select Report ..... Tax Cert District Summary
- Year ..... Enter current property year to copy FROM
- Roll..... Select Primary roll
- Continue ..... Click Print or View button to generate report; Cancel to exit

2. Review Report..... Identify the districts and rolls that need copied to next year

### WARNING

Do NOT copy the same district and roll twice. Doing so will result in duplicate entries in year copied to.

3. Copy Certifications ..... Repeat the following steps for each district and roll that needs copied



*Tools | Table Maintenance | Auditor | Tax Certification | Process | New Year Copy Certification*

- From Year ..... Enter current property year to copy FROM
- District Number ..... Enter district number to be copied
- Assessment Roll ..... Select Primary roll
- To Year..... Enter next property year to copy TO
- Assessment Roll ..... Select Primary roll
- Continue ..... Click OK to continue; Cancel to exit
  - *After reading verification message, click Yes to continue; No or Cancel to return to previous screen without processing*
  - *This copy runs immediately and will give you a message when complete*

4. Additional District/Roll..... Repeat as needed for each district and roll to be copied

5. Solid Waste Table..... If you use the Solid Waste Table, calculate certification amounts as follows

▶▶ *Skip this step if you do not use the solid waste table*

- Table Changes..... Enter any table changes needed for the next year



*Tools | Table Maintenance | Auditor | Tax Certification | Click Solid Waste Table icon*

- *Update ..... Update table as needed*
- Calculate Amounts..... NOTE: Certifications that were pro-rated in the prior year will calculate at full amount



*Tools | Table Maintenance | Auditor | Tax Certification | Process | Calculate Solid Waste Amounts*

- *Year..... Enter year copied TO*
- *Assessment Roll..... Select Primary roll*
- *District Number ..... Enter your solid waste district number*
- *Calculate ..... Click OK to continue; Cancel to exit. After reading verification message, click Yes to continue; No or Cancel to return to previous screen without processing*
- *Done..... Update screen closes when processing is complete*

## 4. END-OF-YEAR (EOY) COPY

### 4A. Copy Parcels & Characteristics

This process is made up of three separate copies (Copy Real, Copy Manufactured and Copy Personal Property). It does not matter what order they are done in. If time permits, consider submitting each of them on a different day.

#### 4A1. *Personal Property*

 *Tools | Batch Processing | Assessor | Copy Processing | Copy Personal Property EOY*

- Personal property parcels created after the Primary Copy with Active status in the source year will copy, provided that the parcel number does not already exist (with any status) in the next year.
- All personal property characteristics on subsequent rolls with Active status in the current year will copy, provided that the next year does not already have a characteristic with the same type and suffix.
- Characteristics with a “transient” business type will remain on the same assessment roll in both years. All other business types will be changed to the primary assessment roll in the next year.

#### □ STEPS

1. Exception Report..... Deal with pre-copy exceptions  
 *Refer to Exceptions on page 5-1 for instructions and explanations*
2. Closed Rolls ..... The following rolls must be closed
  - Personal Property ..... Primary Roll; Non-Occupancy
  - Personal Property ..... 1st Sub Roll; Non-Occupancy
  - Personal Property ..... 2nd Sub Roll; Non-Occupancy
3. Copy Process ..... Copy Personal Property EOY
  - Year ..... Enter From (current) property year
  - Continue ..... Click OK to continue; Cancel to exit
  - Processing Mode ..... Critical Process – Run in batch mode
    - *Refer to Processing Mode on page 1-2 for help selecting a processing mode*
4. Exception Report..... Deal with post-copy exceptions after copy has completed  
 *Refer to Exceptions on page 5-1 for instructions and explanations*

#### 4A2. *Real & Manufactured*

This section includes copies for both real property and manufactured homes, as well as updating characteristics. Both copies should be complete before continuing to the update section.

#### 4A2A. REAL PROPERTY

 *Tools | Batch Processing | Assessor | Copy Processing | Copy Real EOY*

- Real property parcels are not copied as part of the End-of-Year Copy. If any were created after the Primary Copy, other than occupancy parcels as explained in After Copying on page 1-1, they will not be in the next year.
- All characteristics on real property parcels’ subsequent rolls with Active status in the current year will copy, provided that the next year does not already have a characteristic with the same type and suffix. The assessment roll will be changed to primary in the next year except for personal property characteristics with a business type of “Transient.” They will remain on the same assessment roll in both years.
- All characteristics on any real property parcels’ rolls (including primary) with Never Occupied status in the current year will copy, provided that the next year does not already have a characteristic with the same type and suffix. The assessment roll will be changed to primary in the next year.

- Characteristics on the current year's subsequent occupancy rolls will be changed to non-occupancy and calculate at full value in next year. If they have Homeowner's Exemption in the current year, the land characteristic in the next year will be flagged for the exemption.

## □ STEPS

1. Exception Report..... Deal with pre-copy exceptions
  -  *Refer to Exceptions on page 5-1 for instructions and explanations*
2. Closed Rolls ..... The following rolls must be closed before continuing
  - Real Property ..... Primary Roll; Occupancy and Non-Occupancy
  - Manufactured ..... Primary Roll; Occupancy and Non-Occupancy
3. Copy Process ..... Copy Real EOY
  - Year ..... Enter From (current) property year
  - Continue ..... Click OK to continue; Cancel to exit
  - Processing Mode ..... Critical Process – Run in batch mode
  -  *Refer to Processing Mode on page 1-2 for help selecting a processing mode*
4. Exception Report..... Deal with post-copy exceptions after copy has completed
  -  *Refer to Exceptions on page 5-1 for instructions and explanations*

4A2B.

## MANUFACTURED HOMES



*Tools | Batch Processing | Assessor | Copy Processing | Copy Manufactured EOY*

- Manufactured home parcels created after the Primary Copy with Active status in the source year will copy, provided that the parcel number does not already exist (with any status) in the next year. This is for manufactured homes that are not declared real property, since they need a new parcel created in order to be assessed on a subsequent roll.
- All characteristics on manufactured home parcels' subsequent rolls with Active status in the current year will copy, provided that the next year does not already have a characteristic with the same type and suffix. The assessment roll will be changed to primary in the next year.
- Characteristics on the current year's subsequent occupancy rolls will be changed to non-occupancy and calculate at full value in next year. If they have Homeowner's Exemption in the current year, the land characteristic in the next year will be flagged for the exemption.

## □ STEPS

1. Exception Report..... Deal with pre-copy exceptions
  -  *Refer to Exceptions on page 5-1 for instructions and explanations*
2. Closed Rolls ..... The following rolls must be closed before continuing
  - Manufactured ..... Primary Roll; Occupancy and Non-Occupancy
  - Manufactured ..... 1<sup>st</sup> Sub Roll; Occupancy and Non-Occupancy
  - Manufactured ..... 2<sup>nd</sup> Sub Roll; Occupancy and Non-Occupancy
3. Copy Process ..... Copy Manufactured EOY
  - Year ..... Enter From (current) property year
  - Continue ..... Click OK to continue; Cancel to exit
  - Processing Mode ..... Critical Process – Run in batch mode
  -  *Refer to Processing Mode on page 1-2 for help selecting a processing mode*
4. Exception Report..... Deal with post-copy exceptions after copy has completed
  -  *Refer to Exceptions on page 5-1 for instructions and explanations*

## 4A2C. UPDATE CHARACTERISTICS

The following steps can be completed any time after the Real Property and Manufactured Homes copies above have finished. As you run each of these steps, make sure you update the next property year, not the year you copied from.

## □ STEPS

1. Land Base Cost ..... This process will batch update land base cost records on farm and land characteristics in the newly-copied property year
  -  *Tools | Batch Processing | Assessor | Update Land Base Cost Values*
  -  *Skip this section if you do not use land base cost tables to appraise farm and/or land characteristics*
    - Year ..... Enter next (copied TO) property year
    - Assessment Roll ..... Select Primary roll
    - Continue ..... Click OK to continue; Cancel to exit
    - Processing Mode ..... Click Yes to run in batch overnight; No to run locally; Cancel to exit
  -  *Refer to Processing Mode on page 1-2 for help selecting a processing mode*
2. Characteristic Values ..... This process will update characteristic value records for all types except personal property (values for personal property are calculated when declarations are built, returned and/or estimated)
  -  *Tools | Batch Processing | Assessor | Update Characteristic Values*
    - Property Year ..... Enter next (copied TO) property year
    - Characteristic Types ..... Select types and rolls to update
      - Commercial ..... Primary roll
      - Manufactured ..... Primary roll
      - Residential ..... Primary roll
    - Continue ..... Click OK to continue; Cancel to exit. If you continue, complete the following for each type selected above:
      - Verify ..... Read verification message and click Yes to continue; No or Cancel to skip to next type without processing
      - Mode ..... Click Yes to run in batch overnight; No to run locally; Cancel to skip to next type without processing
  -  *Refer to Processing Mode on page 1-2 for help selecting a processing mode*
3. Homeowner's Exemption (HOE) ... Calculate HOE amounts
  -  *Tools | Batch Processing | Assessor | Establish HO Exemptions*
    - Year ..... Enter next (copied TO) property year
    - Assessment Roll ..... Select Primary roll
    - Continue ..... Click OK to continue; Cancel to exit
    - Processing Mode ..... Click Yes to submit to batch; No to run locally; Cancel to exit
  -  *Refer to Processing Mode on page 1-2 for help selecting a processing mode*

## 4B. Copy Exemptions

This section includes copies for Personal Property Exemptions (PPE) and parcel exemptions

### 4B1. *Personal Property Exemptions*

 [Tools](#) | [Batch Processing](#) | [Assessor](#) | [Copy Processing](#) | [Copy PP Exemption EOY](#)

This process copies the Personal Property Exemption (PPE) applications (master and parcel detail) to the next year.

#### □ STEPS

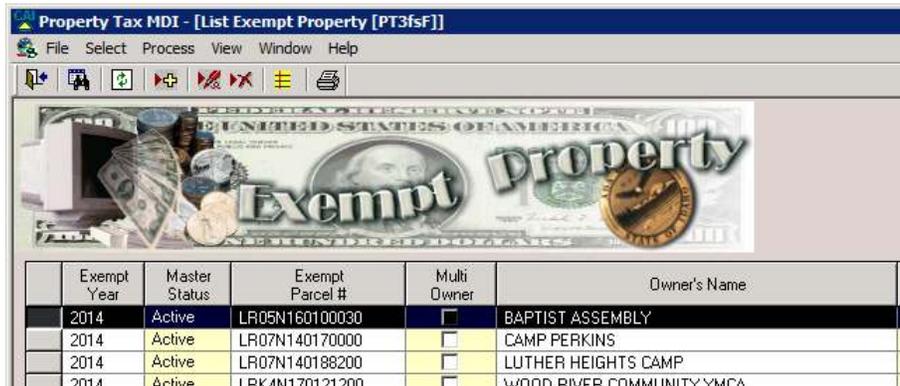
1. Closed Rolls ..... The following rolls must be closed
  - Personal Property ..... Primary Roll; Non-Occupancy
  - Personal Property ..... 1st Sub Roll; Non-Occupancy
  - Personal Property ..... 2nd Sub Roll; Non-Occupancy
2. Completed Copy..... The personal property copy on page 4-1 must be completed
3. Copy Process ..... Copy PP Exemption EOY
  - Year ..... Enter From (current) property year
  - Continue ..... Click OK to continue; Cancel to exit
  - Processing Mode ..... Critical Process – Run in batch mode

 *Refer to Processing Mode on page 1-2 for help selecting a processing mode*
4. Exception Report..... Deal with post-copy exceptions after copy has completed
  -  *Documentation Reference: Personal Property Checklists | Personal Property Exemption – Calculation | Exceptions*

### 4B2. *Parcel Exemptions*

 [Tools](#) | [Batch Processing](#) | [Assessor](#) | [Copy Processing](#) | [Copy Exempt Property EOY](#)

 *Skip this section if you do not use the Exempt Property module*



Exempt Year	Master Status	Exempt Parcel #	Multi Owner	Owner's Name
2014	Active	LR05N160100030	<input type="checkbox"/>	BAPTIST ASSEMBLY
2014	Active	LR07N140170000	<input type="checkbox"/>	CAMP PERKINS
2014	Active	LR07N140188200	<input type="checkbox"/>	LUTHER HEIGHTS CAMP
2014	Active	LRK4N170121200	<input type="checkbox"/>	WOOD RIVER COMMUNITY YMC&

#### Select | Process | Exempt Property

This process is used in conjunction with the Exempt Property Module. Exemptions will be removed in the next year on parcels with an exemption type that requires annual approval by the Board of Equalization. Exemptions are then reapplied on parcels that are approved by the board for that year.

#### □ STEPS

1. Closed Rolls ..... All rolls must be closed in the property year you are copying from
2. Copy Process ..... Copy Exempt Property EOY
  - Year ..... Enter From (current) property year
  - Continue ..... Click OK to continue; Cancel to exit
  - Processing Mode ..... Critical Process – Run in batch mode

 *Refer to Processing Mode on page 1-2 for help selecting a processing mode*

# 4C. Year-End Ownership

 *Tools | Batch Processing | Assessor | Copy Processing | Copy HOE File EOY*

This process copies the parcel ownership file, creating a snapshot of owners as of the end of the calendar year.

- Year-end ownership information is used when calculating Homeowner’s Exemption (HOE) on a parcel that is flagged for “Ownership Change,” indicating that HOE eligibility is based on the year-end ownership.
- This copy should be done as soon as possible after December 31 of the current year. However, since ownership changes are processed in the same property year that they are recorded in, it may take some time to get them all done. Every effort should be made to finish ownership changes in a timely manner so this copy take place.
- This file is critical to the HOE process. Exemptions may not calculate correctly on parcels with ownership changes in the next year if they are calculated before this copy is done.

## □ STEPS

1. Recorded Instruments..... Process as many ownership change instruments as possible that were recorded in the property year being copied from before copying
2. Copy Process ..... Copy HOE File EOY
  - Year ..... Enter From (current) property year
  - Continue ..... Click OK to continue; Cancel to exit
  - Processing Mode ..... Critical Process – Run in batch mode

 *Refer to Processing Mode on page 1-2 for help selecting a processing mode*

4D.

# Tax Certifications

Tax certifications can be copied any time after the tax charge is finished for the roll the certification is on.

## □ STEPS

1. Certification Summary ..... Print the following report



*Tools | Table Maintenance | Auditor | Tax Certification | Click Print icon*

- Select Report ..... Tax Cert District Summary
- Year ..... Enter current property year to copy FROM
- Roll..... Select Primary roll
- Continue ..... Click Print or View button to generate report; Cancel to exit

2. Review Report..... Identify the districts and rolls that need copied to next year

### **WARNING**

Do NOT copy the same district and roll twice. Doing so will result in duplicate entries in year copied to.

3. Copy Certifications ..... Repeat the following steps for each district and roll that needs copied



*Tools | Table Maintenance | Auditor | Tax Certification | Process | New Year Copy Certification*

- From Year ..... Enter current property year to copy FROM
- District Number ..... Enter district number to be copied
- Assessment Roll ..... Select Primary roll
- To Year..... Enter next property year to copy TO
- Assessment Roll ..... Select Primary roll
- Continue ..... Click OK to continue; Cancel to exit
  - *After reading verification message, click Yes to continue; No or Cancel to return to previous screen without processing*
  - *This copy runs immediately and will give you a message when complete*

4. Additional District/Roll..... Repeat as needed for each district and roll to be copied

5. Solid Waste Table..... If you use the Solid Waste Table, calculate certification amounts as follows

▶▶ *Skip this step if you do not use the solid waste table*

- Table Changes..... Enter any table changes needed for the next year



*Tools | Table Maintenance | Auditor | Tax Certification | Click Solid Waste Table icon*

- *Update ..... Update table as needed*
- Calculate Amounts..... NOTE: Certifications that were pro-rated in the prior year will calculate at full amount



*Tools | Table Maintenance | Auditor | Tax Certification | Process | Calculate Solid Waste Amounts*

- *Year..... Enter year copied TO*
- *Assessment Roll..... Select Primary roll*
- *District Number ..... Enter your solid waste district number*
- *Calculate ..... Click OK to continue; Cancel to exit. After reading verification message, click Yes to continue; No or Cancel to return to previous screen without processing*
- *Done..... Update screen closes when processing is complete*

## 5. EXCEPTIONS

 *Reports | Exception Report Selection | Copy Exceptions*

**NOTE** This section is for reference only. Individual steps throughout this document will refer you here as needed for instructions and detailed information about each exception.

There are data situations that prevent some parcels and characteristics from copying from one year to another. It is much easier to deal with them before copying so they will process as they should. When used before copying, the Copy Exceptions report checks for conditions that may cause problems, while there is still time to fix them.

It also checks the results after each copy process, giving you another tool to make sure data is complete and accurate. As the report is created, it checks each parcel and characteristic to see if they have been copied to determine which exceptions to look for.

When this report is ran after copying, the results will be affected by any manual changes made in the next year. Disregard exceptions that result from those changes.

### 5A. Dealing with Exceptions

#### STEPS

1. Create Report..... Print the report as follows:
  - Year ..... Enter next property year (copied TO)
  - Report..... Select Copy Exceptions
  - Copy Process..... Select copy process to work with
  - Continue ..... Click Print or View to generate report; Cancel to exit
2. Review Exceptions..... Review report to identify exceptions needing attention
  - Errors ..... Condition exists that prevents data from copying correctly
  - Warning ..... Condition exists that may prevent data from copying correctly but in some situations that may be okay
  - Informational ..... Condition exists that will not prevent data from copying correctly but you may want to be aware of
3. Update Data ..... Update parcels and/or characteristics as needed
  - Before Copy ..... Depending on the exception, update may need to be made in either the current or next property year
  - After Copy ..... Update must be made in next property year. Changing the current year will have no effect on the next year's data.
4. Repeat as Needed ..... If any changes were made in Step 3, repeat this process as needed until you are satisfied with the result

5B.

## Exception Conditions

Listed in alphabetical order by message text displayed on exception report

### CHRX: ACRE CHANGE

Description .....	Characteristic does not have same number of acres after copying. Acreage should not change as a result of copying. (Exception will not display if either year's acreage is zero)
Severity .....	Warning
Resolution .....	Recalculate characteristic in next year and check acreage on Valuation tab. If still different, contact CAI Help Desk

### CHRX: DID NOT COPY

Description .....	Characteristic with Active status in current year did not copy to next year. Typically this happens if there is not a parcel with Active status in the next year to copy the characteristic to.
Severity .....	Error
Resolution .....	Check to see if parcel exists in next year and, if it does, what its status is: <ul style="list-style-type: none"> <li>• Does Not Exist..... Decide what parcel it should be on in next year (create new parcel in next year if needed); manually copy characteristic from current year to appropriate parcel in next year</li> <li>• Exists, Active .....</li> <li>• Exists, Not Active .....</li> </ul>

### CHRX: NOT EXPECTED

Description .....	Characteristic with Active status exists in the next year but not in the current year
Severity .....	Warning
Resolution .....	If the characteristic was manually created, make sure it doesn't duplicate what is on any of the copied characteristics. If it is okay, no action is needed; otherwise, review the audit change log to find out where it came from and deal with it as needed in next year.

### CHRX: STATUS CHANGE

Description .....	Characteristic with Active status in the current year has a different status in next year. Status should not change as a result of copying.
Severity .....	Error
Resolution .....	If status was manually changed after copying, no action is needed; otherwise, update status as needed in next year

### CHRX: VALUE CHANGE

Description .....	Characteristic does not have same assessed value after copying. Value should not change as a result of copying. (Exception will not display if either year's assessed value is zero)
Severity .....	Warning
Resolution .....	Recalculate characteristic in next year and check assessed value on Valuation tab. If still different, contact CAI Help Desk.

### CHRX: WILL NOT COPY

Description .....	Parcel already has a characteristic with the same type (farm, land, commercial, etc.) and suffix in the next year. Characteristic will not copy unless a change is made.
Severity .....	Warning
Resolution .....	If corresponding characteristic was manually created in next year and you do not want to copy the current one, no action is needed; otherwise, the suffix must be changed on either the current year or next year characteristic so they are unique

### HOE: FLAG ADDED

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Description.....	Characteristic that is not flagged for HOE in current year but it is flagged in next year. HOE flags should not change as a result of copying.
Severity .....	Warning
Resolution .....	If flag was manually changed after copying, no action is needed; otherwise, update HOE flag as needed in next year

### HOE: FLAG REMOVED

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Description.....	Characteristic that is flagged for HOE in current year is not flagged in next year. HOE flags should not change as a result of copying.
Severity .....	Warning
Resolution .....	If flag was manually changed after copying, no action is needed; otherwise, update HOE flag as needed in next year

### NEVER OCCP; NOT EXPECTED

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Description.....	Characteristic with Never Occupied status in the current year exists in the next year (with any status) after the Primary Copy. It should not have copied to next year until the End-of-Year Copy.
Severity .....	Warning
Resolution .....	If characteristic was manually created after copying, is intended to replace the current year characteristic or is it for something different and you still want to keep the current year characteristic? <ul style="list-style-type: none"> <li>• Replacement..... In the current year, change the characteristic's status from Never Occupied to Inactive</li> <li>• Different ..... The suffix must be changed on either the current year or next year characteristic so they are unique</li> <li>• If characteristic was not manually created, contact CAI Help Desk</li> </ul>

### NEVER OCCP; WILL NOT COPY

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Description.....	Characteristic with Never Occupied status in the current year will not be copied during the Primary Copy. It will remain in the current year until the End-of-Year Copy.
Severity .....	Informational

### OCCP; DID NOT CHANGE

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Description.....	Characteristic on the occupancy roll in the current year did not change to non-occupancy in the next year
Severity .....	Error
Resolution .....	Manually change characteristic to non-occupancy in next year

### OCCP: LAND FLAGGED HOE

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Description.....	Characteristic on the occupancy roll in the current year is flagged for HOE but the land is not. Land has been updated and flagged for HOE in next year.
Severity .....	Informational

### OCCP; LAND NOT FLAGGED HOE

---

Description.....	Characteristic on the occupancy roll in the current year is flagged for HOE but the land is not. Land is not flagged for HOE in next year. Copy process should have updated land and flagged it.
Severity .....	Error
Resolution .....	Manually update HOE flag in next year

**OCCP: LAND WILL BE FLAGGED HOE**

Description..... Characteristic on the occupancy roll in the current year is flagged for HOE but the land is not. Land will be updated and flagged for HOE in next year.  
 Severity ..... Informational

**OCCP: WILL BE NON-OCCP**

Description..... Characteristic on the occupancy roll in the current year will be changed to non-occupancy in the next year  
 Severity ..... Informational

**PARCEL: DID NOT COPY**

Description..... Parcel with active status in current year did not copy to next year  
 Severity ..... Error  
 Resolution ..... Contact CAI Help Desk

**PARCEL: NOT EXPECTED**

Description..... Parcel with Active/Remove or Inactive status in current year exists in next year. Only active parcels should have copied.  
 Severity ..... Warning  
 Resolution ..... Review parcel in next year and manually update its status as needed

**PARCEL: STATUS CHANGE**

Description..... Parcel with Active status in current year has a different status in next year. Status should not change as result of copying.  
 Severity ..... Error  
 Resolution ..... Manually update status as needed in next year

**PARCEL: WILL BE COPIED**

Description..... Parcel with Active status in current year that did not exist during the Primary Copy will be copied to next year  
 Severity ..... Informational

**SUB ROLL: DID NOT CHANGE**

Description..... Characteristic on the first or second subsequent roll in the current year did not change to primary in the next year  
 Severity ..... Error  
 Resolution ..... Manually change characteristic to primary in next year

**SUB ROLL: WILL BE PRIMARY**

Description..... Characteristic on the first or second subsequent roll in the current year will be changed to primary in the next year  
 Severity ..... Informational

**TRANSIENT; DIDN'T STAY ON SUB**

Description..... Personal property characteristic with a Transient business type on a subsequent roll in the current year is on the primary roll in next year. Roll should not have changed as a result of copying.  
 Severity ..... Error  
 Resolution ..... Manually update either the business type or roll in next year. Transient personal property is expected to be on one of the subsequent rolls. Non-transient should be on the primary roll after copying.

### **TRANSIENT: UNEXPECTED ROLL**

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Description .....	Personal property characteristic with a Transient business type is on the primary roll. Transient personal property is expected to be on one of the subsequent rolls.
Severity .....	Warning
Resolution .....	Update characteristic to change either its business type or assessment roll <ul style="list-style-type: none"> <li>• Before Copying ..... If the business type is incorrect, change it in the current year If the assessment roll is incorrect, do NOT change in the current year (rolls are already done). Instead, go ahead with the copy and update it to the correct roll in next year.</li> <li>• After Copying ..... Make changes in next year only</li> </ul>

### **TRANSIENT: WILL STAY ON SUB**

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Description .....	Personal property characteristic with a Transient business type on a subsequent roll in the current year will copy to the same roll in the next year
Severity .....	Informational