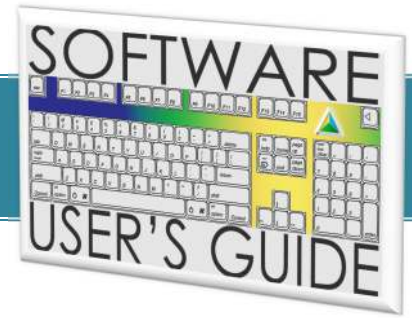


PROPERTY

PROPERTY & TAX MANAGEMENT SYSTEM

Version 07.01.00.01



EXCEPTION REPORTS

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DELIVERING SPECIALIZED TECHNOLOGY, SOFTWARE & SUPPORT TO YOUR ORGANIZATION

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1. OVERVIEW

Several reports are available to provide you with information about your data. They check for various conditions and alert you to existing errors and potential problems, as well as giving you a heads up when there is something you may want to be made aware of.

Exception reports are especially helpful as you finish up each roll and prepare for assessment notices, but they can and should be run periodically throughout the year.

All reports are created by entering the property year and clicking View or Print to create the report, or cancel to exit. Some reports have additional selection criteria as explained in the following sections.

2. CHARACTERISTIC-RELATED

 *Reports | Exception Report Selection | Click on exception name*

ACTIVE PARCEL WITH NO PRIMARY CHARACTERISTIC AND/OR CITIZEN

- Exception Name Active MST No Primary Char-Owner
- Description An active parcel does not have a characteristic designated as the primary; and/or does not have a citizen record designated as the primary contact

PRIMARY CHARACTERISTIC

- Severity Can be okay
- Why It Matters The primary characteristic's property address is used in searches and anywhere a parcel address is displayed or printed
- To Find Issue Primary characteristics are identified on Property Master with red text on the characteristic type button. If none of them have been identified as the primary, all buttons will have black or gray text.
- To Correct Issue Property Master | Edit | Change Primary Property | click Primary Property box on appropriate characteristic | OK | OK to save when prompted

PRIMARY CITIZEN

- Severity Must be corrected
- Why It Matters The primary citizen record's mailing address is used anywhere a mailing address is displayed or printed
- To Find Issue Property Master | Add'l Owner Info | Primary Contact column
- To Correct Issue Property Master | Edit | Change Primary Contact
 - Name at Left *If primary contact is already in grid at left, check its Primary Contact box and set its sequence number to one; renumber any other citizen records as needed. Each record must have a unique number and only one Primary Contact box can be checked. Click OK to validate and save entries, then click Cancel to exit.*
 - Name Not at Left *If primary contact is not already in grid at left, position to it in the right grid (or add a new record if needed), click Add to move it to the left grid, and continue Step 2 below.*

ACTIVE PARCEL AND CHARACTERISTIC WITH NO ACTIVE VALUE

- Exception Name Active MST Char – Inactive Value
- Description Active parcel has an active characteristic with no active value record
 - Severity Can be okay
 - Why It Matters Inactive values will not be included in assessment and/or tax calculations
 - To Find Issue Property Master | Desired characteristic button | Valuation tab | Active Indicator column
 - To Correct Issue Change status of characteristic and/or value as needed

ACTIVE PARCEL WITH INACTIVE CHARACTERISTIC

- Exception Name Active Master – Inactive Char
- Description Active parcel has inactive characteristic(s)
 - Severity Can be okay
 - Why It Matters Inactive characteristics will not be included in assessment and/or tax calculations and will not copy to next year
 - To Find Issue Property Master | Desired characteristic button | Status column in top grid
 - To Correct Issue Change status of characteristic as needed

ACTIVE VALUE ON INACTIVE CHARACTERISTIC

- Exception Name Active Value – Inactive Char
- Description Inactive characteristic has active value record(s)
 - Severity Must be fixed
 - Why It Matters Inactive characteristics will not be included in assessment and/or tax calculations
 - To Find Issue Property Master | Desired characteristic button | Status column in top grid and/or Valuation tab | Active Indicator column
 - To Correct Issue Change status of characteristic and/or value as needed
 - *Characteristic must be Active or Active Remove status if value is active*
 - *Value must be inactive if characteristic is inactive*

CHARACTERISTIC WITH “NEVER OCCUPIED” STATUS

- Exception Name Characteristic – Never Occupied
- Description Characteristic has status of Never Occupied
 - Severity Can be okay
 - Why It Matters “Never Occupied” status is used on characteristics that qualify for exemption because the improvement is either unfinished or has not yet been occupied. They should be reviewed periodically and prior to assessment year closeout to make sure they still qualify.
 - To Find Issue Property Master | Desired characteristic button | Status column in top grid
 - To Correct Issue Change status of characteristic as needed

CHARACTERISTIC AND VALUE HAVE DIFFERENT ASSESSMENT AND/OR OCCUPANCY ROLL

- Exception Name Char vs Value – Roll Occ
- Description Parcel has characteristic with value record(s) that do not have the same assessment and/or occupancy roll
 - Severity Must be fixed
 - Why It Matters Roll and occupancy must match
 - To Correct Issue Click characteristic’s OK button to recalculate value
 - *Contact CAI Help Desk if this does not resolve the issue*

CHARACTERISTIC WITH MORE THAN ONE ACTIVE VALUE

- Exception Name Char with more than 1 Act Value
- Description Characteristic has more than one active value record per state category code
 - Excluding Urban Renewal values which have an active base and active increment record for each category
 - Severity Must be fixed
 - Why It Matters There should never be more than one valuation record for a single category on a characteristic. The program should not allow it to happen, so any parcels listed must be fixed.
 - To Find Issue Property Master | Desired characteristic button | Valuation tab | Active Indicator column
 - To Correct Issue Click characteristic’s OK button to recalculate value
 - *Contact CAI Help Desk if this does not resolve the issue*

3. COPY PROCESSING

 [Reports](#) | [Exception Report Selection](#) | [Click exception name](#)

NOTE This section is being revised. Watch for an update soon.

4. HOMEOWNER'S EXEMPTION

Homeowner's Exemption exceptions include both a consolidated report that allows you to select one or more exceptions to test for at the same time, and several individual reports

4A. CONSOLIDATED REPORT



Reports | Exception Report Selection | HOE Exceptions

NOTE To return to the main exception report panel: Click Refresh icon at upper left

This report allows you to check three types of conditions:

- Definite exceptions that require attention and/or correction
 - Listed in red text on exception report selection panel
 - Selected by default
- Possible exceptions that are not typical but can be acceptable under certain conditions
 - Selected by default
- Information-only conditions

EXEMPTION ADDED OR REMOVED

- Exception Name Added or Removed
- Description HOE has been added (has HOE this year, didn't last year) or removed (had it last year, doesn't have it this year)
 - Severity Can be okay
 - Why It Matters Informational only, but can be helpful in identifying exemption changes that may have been unintentional
 - To Correct Issue Update HOE flags (checkboxes) on owners and characteristics as needed

EXEMPTION AMOUNT EQUALS ZERO

- Exception Name Amount Equal Zero
- Description Parcel has an HOE record but the exemption value is zero
 - Severity Must be fixed
 - Why It Matters Typically parcels have HOE records because you intend for them to receive the exemption. A parcel with no exemption value will not receive any benefit from the exemption.
 - To Correct Issue Update HOE flags on owners and characteristics as needed

EXEMPTION AMOUNT OVER HALF OF VALUE

- Exception Name Amount Over 50% of Value
- Description Parcel has an HOE amount that exceeds half of the total assessed value of the parcel
 - Severity Must be fixed
 - Why It Matters Statutes place limits on amount of value that can be exempted. Parcels exceeding that amount need to be reviewed and corrected.
 - To Correct Issue Update HOE flags on owners and characteristics as needed

EXEMPTION AMOUNT OVER MAXIMUM ALLOWED

- Exception Name Amount over Maximum
- Description Parcel has a total exemption value that exceeds the maximum set each year by the State Tax Commission
 - Severity Can be okay
 - Why It Matters There are specific circumstances that allow a parcel's total exemption amount to exceed the maximum. Parcels not meeting those conditions should not exceed the limit.
 - To Correct Issue Recalculate HOE amount by clicking OK on the HOE edit panel

EXEMPTION AMOUNT UNDER HALF OF VALUE

- Exception Name Amount Under 50% of Value
- Description Parcel has a total exemption amount that is less than half of the assessed value (and less than the maximum allowed)
 - Severity Can be okay
 - Why It Matters If the exemption amount is less than the maximum, it will typically be half of the assessed value. If it is less than that, the owner may not be getting the full exemption benefit that they qualify for.
 - To Correct Issue Update ownership and occupancy percentages as needed

EXEMPTION OVERRIDE EXISTS

- Exception Name Exemption Override
- Description Parcel has an exemption override
 - Severity Can be okay
 - Why It Matters Overrides are user maintained. Once an HOE record is marked as an override, there are no other edits, validation, etc., to catch potential problems. Those parcels are listed here to give you a chance to check that they are okay. Verify and update as needed.

LAND GROUP HOMESITE USED

- Exception Name Land Group Homesite Used
- Description Land Group homesite value has been used for HOE calculations rather than actual assessed land value
 - Severity Can be okay
 - Why It Matters Mainly informational only, but if any listed parcels also lower exemption amounts than expected you should review the Land Group homesite values

LAND GROUP HOMESITE ZERO

- Exception Name Land Group Homesite Zero
- Description HOE land value is zero rather than the actual assessed value because Land Group homesite value has been used and the homesite value is zero
 - Severity Can be okay
 - Why It Matters No land value is included in HOE calculation for parcels listed. This can be okay when the improvement value is enough to use the entire HOE amount. As a general rule, entries on this list should be corrected.
 - To Correct Issue Update Land Group table with correct homesite values, then batch update HOE amounts
 - *Tools | Table Maintenance | Assessor | Land Records | Group | Group File*
 - *Tools | Batch Processing | Assessor | Establish HO Exemptions*

LAND WITH HOE, NO IMPROVEMENTS

- Exception Name Land with No Improvements
- Description Parcel has HOE on land only
 - Severity Can be okay
 - Why It Matters HOE can be calculated on parcels without improvements under certain circumstances. When applying an owner's exemption to more than one parcel, care must be taken to ensure that the combined total exemption for all the parcels does not exceed the maximum allowed. If they are not related, the program will limit each individual parcel, but does not add them together. You are responsible for verifying the combined total.
 - To Correct Issue Relate manufactured and real parcels as needed
Update HOE flags on characteristics as needed
Use overrides to adjust exemption amounts as needed

OWNER OCCUPANCY LESS THAN 100%

- Exception Name Owner Occupancy Not 100%
- Description Parcel has characteristic(s) that are not fully owner-occupied. The exemption value will be less than 100% because some portion of the value does not qualify.
 - Severity Can be okay
 - Why It Matters Parcels that do not have a mixed use (residential/commercial, etc.) or have some part of the parcel that is not owner-occupied typically qualify for the full exemption
 - To Correct Issue Update occupancy percentages on HOE edit panel as needed

OWNER PERCENTAGE LESS THAN 100%

- Exception Name Ownership Percentage Not 100%
- Description Parcel has more than one citizen record with ownership percentage and one or more of them is not flagged for HOE
 - Severity Can be okay
 - Why It Matters Parcel may not receive full exemption amount that it qualifies for if all eligible owners are not flagged. There are instances where the qualifying ownership total is less than 100% so it is not uncommon to have entries for this exception.
 - To Correct Issue Informational message above ownership section shows total ownership percentage being used for the exemption. Update HOE flags on owners as needed
 - *Incorrect ownership percentages can be corrected from Deed Processing Main Screen (edit HOE and click OK to update exemption amount after making any changes to owner percentages)*
 - *Search Screen | Right-click parcel | Deed Processing Main Screen | Edit | Change Ownership*

REAL PARCEL HAS HOE, RELATED MANUFACTURED DOES NOT

- Exception Name Related MFG Not Flagged
- Description Real parcel has owners and characteristics flagged for HOE but related manufactured parcel's characteristics are not flagged
 - Severity Can be okay
 - Why It Matters Related manufactured parcel will not have HOE
 - To Correct Issue Update HOE flags on owners and characteristics as needed

NON-ACTIVE CHARACTERISTIC FLAGGED FOR HOE

- Exception Name Status Not Active
- Description Parcel has characteristic(s) with status of Never Occupied and/or Inactive that are flagged for HOE
 - Severity Must be fixed
 - Why It Matters: Value of Never Occupied and Inactive characteristics is not included in assessed value. Characteristics should not be flagged for HOE unless they are either Active or Active Remove status.
 - To Correct Issue Update characteristic status if it is incorrect; otherwise remove HOE flag from non-active characteristic

4B.

INDIVIDUAL REPORTS

 [Reports](#) | [Exception Report Selection](#) | [Click exception name](#)

ONE OWNER HAS MULTIPLE HOMEOWNER’S EXEMPTIONS

- Exception Name Multiple Homeowners
- Description Owner is receiving HOE on more than one parcel
 - Severity Can be okay
 - Why It Matters Owners typically receive HOE on a single parcel. However, there may be instances when that is not the case. Entries should be verified to make sure you intend for them to have the exemption on all parcels listed with their name.
 - To Correct Issue Update HOE flags on owners and characteristics as needed

NO HOE BUT MAILING AND PROPERTY ADDRESSES MATCH

- Exception Name No HOE – Matching Prop Mail Adrs
- Description Parcel does not have HOE, but primary contact’s mailing address matches primary characteristic’s property address. Matching mailing and property addresses may indicate that the property is the primary residence.
 - Severity Can be okay
 - Why It Matters Qualifying owners may not be receiving exemption
 - To Correct Issue Update HOE flags on owners and characteristics if owner has applied and approved. If no application has been filed, any further action depends on county policy (for example, notification to owner that they may qualify).

RESIDENTIAL AND PROPERTY ADDRESSES DO NOT MATCH

NOTE This report will only be meaningful if you maintain residential property addresses in the citizen file

- Exception Name Homeowners Mismatch Address
- Description Parcel has HOE but primary contact’s residential address does not match primary characteristic’s property address. Mismatched mailing and property addresses may indicate that the property is not the primary residence.
 - Severity Can be okay
 - Why It Matters Non-qualifying owners may be receiving exemption
 - To Correct Issue Depending on your county policies, you may want to take steps to verify eligibility for the exemption. Owners with residential and property addresses with even slight spelling or abbreviation differences will show on this report, even though the addresses may actually be the same.
Update HOE flags on owners and characteristics as needed

5. LAND GROUPS

5A. SUMMARY REPORT

 [Reports](#) | [Exception Report Selection](#) | [Group File Report](#)

LAND GROUP PARCEL SUMMARY

- Report Name Group File Report
- Description Summary information for each land group
 - Grouped by type (section, subdivision, manufactured)
- Optional Exception Reports Three exception tests are available, as explained below

5B. EXCEPTIONS

 [Reports](#) | [Exception Report Selection](#) | [Group File Report](#) | [Click exception name](#)

COMPARE LAND GROUP & PARCEL LOCATION CODE

NOTE This is only used if you assign location codes to individual parcels based solely on the parcels' land group.

- Exception Name Location Code Exception
- Description Location code on parcel does not match that of land group
 - Severity Can be okay
 - Why It Matters If all parcels within a land group should have the same location code the program allows you to enter the code on the land group and batch update the group's parcels with that code. If you are using that option, this report allows you to identify parcels that do not have the same location code as the rest of the group.
 - To Correct Issue Run Parcel Location Code Update process from Land Group table to assign group location code to all parcels in the group
 - *Do not run this process unless you are certain you want to update all parcels in the group*

COMPARE LAND GROUP & PARCEL APPRAISER INITIALS

NOTE This is only used if you assign appraiser initials to individual parcels based solely on the parcels' land group.

- Exception Name Appraiser Initial Exception
- Description Appraiser initials on parcel do not match that of land group
 - Severity Can be okay
 - Why It Matters If all parcels within a land group should have the same appraiser initials the program allows you to enter the initials on the land group and batch update the group's parcels with those initials. If you are using that option, this report allows you to identify parcels that do not have the same initials as the rest of the group.
 - To Correct Issue Run Group Update process from Land Group table and select Appraiser's Initials to assign initials to all parcels in the group
 - *Do not run this process unless you are certain you want to update all parcels in the group*

PARCELS NOT ASSIGNED TO GROUP

- Exception Name Unassigned Parcels
- Description Parcel is not assigned to a land group
 - Severity Can be okay
 - Why It Matters Land groups are used to associate parcels together for various reasons, including sorting, reporting, applying modifiers and homeowner's exemption calculations
 - *All real property parcels should be assigned to a land group*
 - *We recommend that all manufactured parcels be assigned to land groups as well*
 - *Personal property parcels do not need to be assigned to land groups*
 - To Correct Issue Update land groups as needed
 - *Single Parcel Property Master | Edit | Change Land Group*
 - *Batch Update Land Group icon | Right-click group to add parcels to | Reassign Parcels*
 - *This will allow you to update groups of parcels by parcel number range*

6. OWNERSHIP

 [Reports](#) | [Exception Report Selection](#) | [Ownership](#)

6A. CONSOLIDATED REPORT

PARCEL OWNERSHIP IS ZERO

- Exception Name: Ownership Percent: Zero
- Description: Parcel has no owners or parcel has owners with no ownership percentage
 - Severity: Must be fixed
 - Why It Matters: All parcels must have 100% ownership
 - To Correct Issue Update ownership and/or percentages from Deed Processing Main Screen
 - [Search Screen](#) | [Right-click parcel](#) | [Deed Processing Main Screen](#) | [Edit](#) | [Change Ownership](#)

PARCEL OWNERSHIP UNDER 100%

- Exception Name: Ownership Percent: Under 100%
- Description: Parcel has owners with total ownership under 100%
 - Severity: Must be fixed
 - Why It Matters: All parcels must have 100% ownership
 - To Correct Issue Update ownership percentages from Deed Processing Main Screen
 - [Search Screen](#) | [Right-click parcel](#) | [Deed Processing Main Screen](#) | [Edit](#) | [Change Ownership](#)

PARCEL OWNERSHIP EXCEEDS 100%

- Exception Name: Ownership Percent: Over 100%
- Description: Parcel has owners with total ownership exceeding 100%
 - Severity: Must be fixed
 - Why It Matters: All parcels must have 100% ownership
 - To Correct Issue Update ownership percentages from Deed Processing Main Screen
 - [Search Screen](#) | [Right-click parcel](#) | [Deed Processing Main Screen](#) | [Edit](#) | [Change Ownership](#)

PARCEL PRIMARY FLAG DIFFERENT THAN OWNERS

- Exception Name: Primary Flag: Mismatch
- Description: Parcel has a different owner/contact flagged as the primary than the ownership table does
 - Severity: Must be fixed
 - Why It Matters: The parcel and ownership tables must always be in sync to ensure proper display on panels and searches as well as printing on reports
 - To Correct Issue Update primary owner flag
 -
 -
 - from Deed Processing Main Screen
 - [Search Screen](#) | [Right-click parcel](#) | [Deed Processing Main Screen](#) | [Edit](#) | [Change Ownership](#)

PARCEL HAS NO PRIMARY OWNER/CONTACT

- Exception Name: Primary Flag: None
- Description: Parcel does not have an owner/contact flagged as the primary
 - Severity:..... Must be fixed
 - Why It Matters: Every parcel must have a primary owner/contact to ensure proper display on panels and searches as well as printing on reports
 - To Correct Issue Update primary flag from Deed Processing Main Screen
 - *Search Screen | Right-click parcel | Deed Processing Main Screen | Edit | Change Ownership*

PARCEL HAS MULTIPLE PRIMARY OWNERS/CONTACTS

- Exception Name: Primary Flag: Multiple
- Description: Parcel has more than one owner/contact flagged as the primary
 - Severity:..... Must be fixed
 - Why It Matters: Every parcel must have only one primary owner/contact to ensure proper display on panels and searches as well as printing on reports
 - To Correct Issue Update primary flag from Deed Processing Main Screen
 - *Search Screen | Right-click parcel | Deed Processing Main Screen | Edit | Change Ownership*

PARCEL'S PRIMARY OWNER/CONTACT NOT FIRST

- Exception Name: Primary Flag: Not #1
- Description: Parcel has an owner/contact flagged as the primary but not the first in sequence order number
 - Severity:..... Must be fixed
 - Why It Matters: Every parcel's primary owner/contact must be first in sequence order to ensure proper display on panels and searches as well as printing on reports
 - To Correct Issue Update primary flag and/or sequence number from Deed Processing Main Screen
 - *Search Screen | Right-click parcel | Deed Processing Main Screen | Edit | Change Ownership*

PARCEL'S FIRST OWNER/CONTACT NOT PRIMARY

- Exception Name: Sequence Number: #1 Not Primary
- Description: Parcel has an owner/contact that is first in sequence order but not flagged as the primary
 - Severity:..... Must be fixed
 - Why It Matters: Every parcel's first owner/contact in sequence order must also be the primary owner/contact to ensure proper display on panels and searches as well as printing on reports
 - To Correct Issue Update sequence number and/or primary flag from Deed Processing Main Screen
 - *Search Screen | Right-click parcel | Deed Processing Main Screen | Edit | Change Ownership*

PARCEL HAS DUPLICATE SEQUENCE NUMBER

- Exception Name: Sequence Number: Duplicate
- Description: Parcel has more than one owner/contact with the same sequence order number
 - Severity:..... Must be fixed
 - Why It Matters: Every parcel's owners/contacts must have a unique sequence order number to ensure proper display on panels and searches as well as printing on reports
 - To Correct Issue Update sequence numbers from Deed Processing Main Screen
 - *Search Screen | Right-click parcel | Deed Processing Main Screen | Edit | Change Ownership*

PARCEL HAS NO FIRST OWNER/CONTACT

- Exception Name: Sequence Number: No #1
- Description: Parcel has no owners/contacts that are first in sequence order
 - Severity:..... Must be fixed
 - Why It Matters: Every parcel must have an owner/contact that is first in sequence order to ensure proper display on panels and searches as well as printing on reports
 - To Correct Issue Update sequence numbers from Deed Processing Main Screen
 - *Search Screen | Right-click parcel | Deed Processing Main Screen | Edit | Change Ownership*

PARCEL HAS MULTIPLE FIRST OWNERS/CONTACTS

- Exception Name: Sequence Number: Multiple #1
- Description: Parcel has more than one owner/contact that is first in sequence order
 - Severity:..... Must be fixed
 - Why It Matters: Every parcel must have only one owner/contact that is first in sequence order to ensure proper display on panels and searches as well as printing on reports
 - To Correct Issue Update sequence numbers from Deed Processing Main Screen
 - *Search Screen | Right-click parcel | Deed Processing Main Screen | Edit | Change Ownership*

PARCEL HAS GAPS IN OWNER/CONTACT SEQUENCE

- Exception Name: Sequence Number: Not Consecutive
- Description: Parcel's owners/contacts are not numbered consecutively
 - Severity:..... Should be fixed
 - Why It Matters: Every parcel's owners/contacts should be ordered consecutively, starting with number one for the primary owner/contact.
 - *This will not hurt anything but there is no reason for them not to be in the proper order*
 - To Correct Issue Update sequence numbers from Deed Processing Main Screen
 - *Search Screen | Right-click parcel | Deed Processing Main Screen | Edit | Change Ownership*

7. PARCEL RELATIONSHIPS

 *Reports | Exception Report Selection | Click exception name*

MANUFACTURED PARCEL WITH INVALID REAL PARCEL NUMBER

- Exception Name MFG with Invalid Real Parcel #
 - Description Manufactured parcel has relationship to a real property parcel that is invalid
 - Severity Must be fixed
 - Why It Matters Both parcels must have Active or Active Remove status. Relationships can affect tax code areas, property addresses, homeowner’s exemption, and tax collection panels.
 - To Correct Issue Update real property parcel number on manufactured characteristic
 - *Property Master | Manufactured button | Primary tab | Real Parcel #*

PERSONAL PROPERTY PARCEL WITH INVALID REAL PARCEL NUMBER

- Exception Name PP with Invalid Real Parcel #
- Description Personal property parcel has relationship to a real property parcel that is invalid
 - Severity Must be fixed
 - Why It Matters Both parcels must have Active or Active Remove status. Relationships can affect tax code areas, property addresses, and tax collection panels.
 - To Correct Issue Update real property parcel number on personal characteristic
 - *Property Master | Personal button | Primary tab | Real Parcel*

8. TAX CODE AREAS

 [Reports](#) | [Exception Report Selection](#) | [Click exception name](#)

VALUE RECORDS WITH INVALID CODE AREA

- Exception Name Invalid Code Area
- Description Parcel has value records with invalid tax code area number
 - Severity Must be fixed
 - Why It Matters Tax code area does not exist in Property for the year being reviewed. Tax code areas are used for abstracts, tax calculations and distribution. Every parcel is required to have a valid tax code area.
 - To Correct Issue Click characteristic's OK button to recalculate value
 - *Contact CAI Help Desk if this does not resolve the issue*

COMPARE PARCEL & VALUE RECORD CODE AREAS

- Exception Name Master vs. Value – Code Area
- Description Tax code area on parcel does not match that of the value record(s)
 - Severity Must be fixed

PARCELS IN URBAN RENEWAL AREAS

- Why It Matters Parcel and value records must have the same tax code area number
- To Correct Issue Click characteristic's OK button to recalculate value
 - *Contact CAI Help Desk if this does not resolve the issue*

PARCELS NOT IN URBAN RENEWAL AREAS

- Why It Matters Base value record must have same tax code area as the parcel
Increment value records must have the same tax code area as the parcel's Urban Renewal project
- To Correct Issue Click characteristic's OK button to recalculate value
 - *Contact CAI Help Desk if this does not resolve the issue*

9. URBAN RENEWAL

 *Reports | Exception Report Selection | Urban Renewal Exceptions*

NOTE If you add or change any base values on a parcel, all characteristics on that parcel must be recalculated afterwards by opening the characteristic and clicking OK button.

Failure to update all characteristic values on a parcel after changing any of its base values may result in improper allocation of value between base and increment code areas.

CATEGORY BASE VALUE EXCEEDS ACTUAL VALUE

- Exception..... Category: Base Exceeds Actual
- Description..... Category’s Urban Renewal base value is more than the current value of the category
 - If category shown is found on more than one characteristic, additional text will identify which characteristic(s) have a base value higher than their actual value
 - Severity..... Must be fixed
 - Why It Matters Base value must not exceed actual value
 - To Correct Issue Update base values as needed and recalculate value on all characteristics

PARCEL BASE VALUE EXCEEDS ACTUAL VALUE

- Exception..... Parcel: Base Exceeds Actual
- Description..... Parcel’s total Urban Renewal base amount is more than the current value of the parcel
 - Severity..... Must be fixed
 - Why It Matters Base value must not exceed actual value
 - To Correct Issue Update base values as needed and recalculate value on all characteristics

PARCEL BASE VALUE EQUAL TO ZERO

- Exception..... Parcel: No Base Value
- Description..... Real or manufactured parcel is assigned to Urban Renewal project but has no base value
 - Severity..... Can be okay
 - Why It Matters All taxes collected on parcel will be distributed to Urban Renewal agency. Base taxing districts will not receive any money from a real or manufactured parcel with zero base value.
 - To Correct Issue Update base values as needed and recalculate value on all characteristics

10. VALUE COMPARISON

 *Reports | Exception Report Selection | Click exception name*

There are two exception reports that allow you to compare total assessed values in one property year to another, and list any parcels with value differences greater than or equal to the amount (percentage or dollar) that you enter. Parcels with excessive value differences may indicate data entry or other errors on the parcel. Any issues should be addressed before continuing.

The steps for both reports are the same, except for the “difference” you enter. It will be either a percentage or a dollar amount, depending on which report you are running. If you want to see all parcels that have any value change, enter “1” as the difference amount. Any parcel that is not listed does not have a value change.

CREATE REPORTS

ASSESSED VALUE DIFFERENCE BY PERCENTAGE

- Exception Name Assessed Value Diff %
- Criteria Enter criteria in fields at top of panel
 - Characteristic Type Select from dropdown list of types
 - Difference % Enter minimum percent difference to be reviewed
 - *Must be at least one percent*
 - *Report will show characteristics with a positive or negative difference greater than or equal to the number you enter*
 - Year – Current..... Enter current year
 - Year – Prior Enter last year

ASSESSED VALUE DIFFERENCE BY DOLLAR AMOUNTS

- Exception Name Assessed Value Diff \$
- Criteria Enter criteria in fields at top of panel
 - Characteristic Type Select from dropdown list of types
 - Difference \$ Enter minimum dollar amount difference to be reviewed
 - *Must be at least one dollar*
 - *Report will show characteristics with a positive or negative difference greater than or equal to the number you enter*
 - Year – Current..... Enter current year
 - Year – Prior Enter last year

UPDATING VALUES

After reviewing the report(s) above, update tables and/or individual parcels as needed to achieve desired values

- Single Parcel Changes..... Update individual parcel characteristics as needed
- Table Changes Make changes to modifier and/or trend tables as needed
 - Land Base Cost If changes are made to Land Base Cost tables, repeat Land Base Cost section above
 - Characteristic Values If changes are made to any of the following tables, repeat Characteristic Values section above for any affected characteristic type
 - Land Base Cost, Local Cost Modifier, Area Modifier, Farm Modifier, Characteristic Trend Modifier, Parcel Trend