PMB085
PM-TREND PARCEL MASTER

<u>PROGRAM FUNCTION:</u>

This program will trend the values in Parcel Master based on information selected by the operator. ***REQUIRES DEDICATED UAD FILES***

<u>Balancing Procedures - before trending:</u>
(Use the same limits on all programs)

Report 1. PMB025 - Homeowner, Circuit Breaker and Market Adjustment edit
              Clean up these edits before continuing
     2. **SAVE UAD FILES** (option 5 on menu "Back".)
Report 3. PMB002 - Parcel Master recap by category
Report 4. PMB012 - HO & CB value (Select "summary of all")
Report 5   PMB012 – Hardship Detail

These reports will be used later (page 5) for balancing purposes.

<u>REQUIRED RESPONSES SUPPLIED BY OPERATOR:</u>

We recommend that you fill out the form on page 6 for each trend you wish to perform.

01   Have the files been backed up? (Y or N)
02   Do you want to update the value? (Y or N)
     If "N", you can review the data and select to update at the end of the program
03   Limits
04   Parcel Types (Y or N)
     If 'Y', enter parcel types to be **Included.**
05   Parcel Type window (Y or N)
     If 'Y', select displayed parcel types using an 'X'.
06   Location Codes (Y or N)
     If 'Y', enter location codes to be **Included.**
     From: To: (up to five)
07   Printer prompts
08   Categories to trend
09   Factors by category (XX.XXXXXXXX)
     (eg. 95% = 0095000000   105% = 0105000000)
10   Value range for trending (from/to)
11   Do you wish to exclude review years? (Y or N)
       If <u>Yes</u>: Key in up to 10 review years
       If <u>Yes</u>: Do you wish to trend categories without review years? (Y or N)
12   Do you wish to Exclude Location Codes (Y or N)
     If 'Y', enter the location codes to be **Excluded**. (up to 9)
13   Do you wish to Exclude parcel types (Y or N)
     If 'Y', enter the parcel types to be **Excluded**. (up to 9)

PMB085

A report will print at this time
If you selected "N" for prompt #02:
14   Review this report to determine if the results are what you expected. If these are the correct results, you may re-execute the trend at this time.
       Do you want to update with these trended values? (Y or N)

EDITS & EDIT CAUSES:

01 Review Years
A character other than a "Y" or "N" was entered in this field, or the field was left blank.
To continue key in a "Y" or "N".

04 Duplicate Category
A category was entered more than once. A category cannot be trended more than once during the same trend execution.

05 Zero Factor Percent
A category was selected to be trended, but no factor % was keyed in for the category.

07 Trend Cat w/o Rev Yr
Exclude review years was selected, but no response was entered to trend categories without review years. Enter either "Y" or "N" to continue.

08 Need Value Range or 0-9999999999
If you want a selected dollar value range, key in that range. Otherwise, key in zero through all nines.

09 From Value Greater Than To Value
The "From" amount of the value you keyed in is larger than the "To" amount.

COMMENTS:

Prompt #02 - This prompt gives the ability to execute the trend program without updating the values in the files.

Prompt #11 - If the first answer is "Y" then the system can exclude the trending of a category with the selected review year on individual parcels.

Prompt #11 - If the second answer is "Y" then the system can include or exclude the trending of categories without review years.

Prompt #14 - This prompt gives the ability to update the files with the trended values on the report without having to key in all the prompt responses again.

PMB085

OUTPUT SUMMARY:
Two reports will be printed during the execution of the trend program:

PMB085 - Parcel Master Trend
PMB085B - Parcels not Trended

PMB085
The report will list parcel number, code area, type, location, category, review year, old value, trend factor, new value, number of parcels, total for old value, total for new value and operator responses.

PMB085B
The report will list parcel number, category, if it has homeowner and/or circuit breaker, and/or market adjustment, the reason why the category was not trended, and a count of parcels not trended.

There are six edits that can print on this report:

1.   Duplicate Trend Categories; Category Not Trended
       The parcel has duplicate categories that are categories selected to be trended. The duplicate categories will NOT be trended, but any other categories that do not have duplicates and meet all other criteria will be trended.

2.   HO% not 50%; PCT = 0; HO Not Trended
       The homeowner for this parcel is marked as "not at 50%" but nothing has been entered in the applicable percentage field. The homeowner market and exemption amounts for this category will not be trended, but the market value and Circuit Breaker market (if applicable) will be trended.

3.   Hardship Exemption Exists; Category not Trended
       There is a hardship exemption on this category, so this category was not trended. However, any additional categories that meet all the other criteria will be trended.

4.   Casualty Loss Exemption Exists; Category Not Trended
       There is a casualty loss exemption on this category, so this category was not trended. However, any additional categories that meet all the other criteria will be trended.

5.   Remediated Land Exemption Exists; Category Not Trended
       There is a remediated land exemption on this category, so this category was not trended. However, any additional categories that meet all the other criteria will be trended.

6.   Parcel has More Than 99 Categories; Parcel Not Trended
       There are more than 99 categories on this parcel. None of the categories on this parcel have been trended.

PMB085

SPECIAL CONSIDERATIONS:

SAVE ALL UAD FILES PRIOR TO EXECUTING THIS PROGRAM If you answer 'N' to the prompt "Have the files been backed up?", it will cancel you out of the program so you can back up the files.

There are other reasons why a parcel will not be trended besides those listed on the PMB085B edit list. The following are additional reasons:

- The parcel is not an "A" status
- The parcel does not meet all the requirements of the selected criteria

Any time the HO exemption exceeds $50,000, the maximum of $50,000 will be used for the total exemption amount for the parcel. If there are multiple categories that qualify for the HO exemption and the total HO exemption amount for the parcel would be greater than $50,000, each category will get a proportionate share of the $50,000 exemption.

	Old Market Value	Old Exemption	New Market Value	New Calculated Exemption	New Adjusted Exemption
Cat 47	15,029	7,515	25,549	12,775	8,350
Cat 48	69,323	34,662	127,781	63,891	41,650
	84,352	42,177	153,330	76,666	50,000

The factor for Cat 47 was 1.70 and the factor for Cat 48 was 1.80. The total calculated new exemption value for the parcel would be $76,666. Since the maximum allowed is $50,000, we will take the proportionate amounts for each category to total $50,000. The new market value for Cat 47 is .167 of the total new market value of $153,330 and the new market value for the Cat 48 is .833 of the total new market value; so .167 of $50,000 is $8,350.

Balancing Procedures - AFTER trending:
(Use the same limits on all programs)

These reports are to be **used in conjunction with reports 1-5 from page 1** for the balancing procedures below.

Report 6.   PMB002 - Parcel Master recap by category
Report 7.   PMB012 - Ending HO & CB value (select "summary of all")
Report 8   PMB012 – Hardship Detail
Report 9.   PMQ369 - Homeowners not at 50% or over $50,000

BALANCE PARCEL MASTER: (by category)

    PMB002 - Report 3 (page 1)
- PMB085 - Old Market Value
+ PMB085 - New Market Value
= PMB002 - Report 6 (page 4)

BALANCE HOMEOWNER, CIRCUIT BREAKER AND MARKET ADJUSTMENT:

Homeowners: (Both Total Market Value and Total Exemption, by category)

    PMB012 - Report 4 (page 1)
- PMB085 - Old Value
+ PMB085 - New Value
= PMB012 - Report 7 (page 4)

Circuit Breaker: (by category)

    PMB012 - Report 4 (page 1)
- PMB085 - Old Market Value
+ PMB085 - New Market Value
= PMB012 - Report 7 (page 4)

Market Adjustment: (Grand Total)

    PMB012 - Report 5 (page 1)
- PMB085 - Old Value
+ PMB085 - New Value
= PMB012 - Report 8 (page 4)

Review the PMQ369 (report 9, page 4).

You will need to manually update any parcels that were not trended by this program due to edits.

PMB085

TREND AREA _____

LIMITS: FROM_____

          TO_____

<u>TREND SELECTIONS:</u>

		VALUE RANGE	
CAT	FACTOR	FROM	TO
___	___._____	_____	_____
___	___._____	_____	_____
___	___._____	_____	_____
___	___._____	_____	_____
___	___._____	_____	_____
___	___._____	_____	_____

DO YOU WISH TO EXCLUDE REVIEW YEARS?....<u>(Y or N)</u>
IF 'Y':   _____ _____ _____ _____ _____ _____ _____ _____ _____ _____
IF 'Y': DO YOU WISH TO TREND CATEGORIES WITHOUT REVIEW YEARS?<u>(Y or N)</u>

EXCLUDE SPECIFIC LOCATION CODES?.. <u>(Y or N)</u>
IF 'Y', LIST YOUR SELECTIONS BELOW:

_____ _____ _____ _____ _____ _____ _____ _____ _____

EXCLUDE SPECIFIC PARCEL TYPES? <u>(Y or N)</u>
IF 'Y', LIST YOUR SELECTIONS BELOW:

___ ___ ___ ___ ___ ___ ___ ___ ___

INCLUDE ONLY SPECIFIC LOCATION CODES? (Y or N)
If 'Y', LIST YOUR SELECTIONS BELOW

FROM_____ TO_____   FROM_____ TO_____   FROM_____ TO_____
FROM_____ TO_____   FROM_____ TO_____   FROM_____ TO_____
FROM_____ TO_____   FROM_____ TO_____   FROM_____ TO_____

INCLUDE ONLY SPECIFIC PARCEL TYPES? (Y or N)
If 'Y', LIST YOUR SELECTION BELOW

____ ____ ____ ____ ____ ____ ____ ____ ____ ____ ____ ____ ____

____ ____ ____ ____ ____ ____ ____ ____ ____ ____ ____ ____ ____

____ ____ ____ ____ ____ ____ ____ ____ ____ ____ ____ ____ ____

PMB085