

PVB004
PV-UPDATE EXEMPTIONS AFTER ROLL

PROGRAM FUNCTION:

This program reviews new values rolled in from ProVal and updates the homeowner market value, homeowner exemption and circuit breaker values accordingly. This program is embedded in the main roll program PVB003C and spools in two files, PVB004A and PVB004B. **REQUIRES DEDICATED UAD FILES.**

REQUIRED RESPONSES SUPPLIED BY OPERATOR:

None

COMMENTS:

The homeowner market value and homeowner exemption will be updated as long as there is a value and exemption in the category file (with the exception of category 47), even if the exemption has been disallowed in PM. However, the circuit breaker (CB) value will not update if the CB exemption has been disallowed in the CB master file.

Only the sheets with 'Dwelling' and 'Mhome' will be updated or parcels with other improvements only will update, but only if there is value already present in the category file. If a parcel has 2 sheets, 1 with a residential improvement and 1 without, only the sheet with the residential improvement will receive homeowner value.

PVB004B lists the errors shown on PVB004A separately for use in updating parcel master.

OUTPUT SUMMARY (or NA):

The reports list the parcel key, total value, the old/new circuit breaker market value, the old/new homeowner market and old/new homeowner exemption and category.

Possible Edits:

Multiple RP, MH sheets coded for homeowners - **WILL NOT UPDATE**

The parcel has multiple improvements on multiple sheets (eg R01 and R02) with a dwelling type of 'D' or 'M.' You will need to update the parcel in PM by hand. This includes review year, acres, total value, homeowner market value and exemption, as well as the circuit breaker market value.

Review circuit breaker market value and adjust - **WILL UPDATE IMPROVEMENT VALUE ONLY**

1)The CB land value will need to be manually updated to reflect the value of the land.

Or

2)The prior year's circuit breaker market value was not equal to the prior year's homeowner market value. Usually these two values are the same. The circuit breaker value was probably reduced to reflect a % of ownership. Therefore, the

current year circuit breaker market value needs researched and may need to be manually adjusted.

No HO Record

Has homeowners value, but no homeowners record. **The HO/CB will not be updated.**

No CB Record

Has circuit breaker value, but no circuit breaker record. **The HO/CB will not be updated.**

HO Not at 50%

Homeowners market not at 50% will be calculated from the % listed on the Homeowner's screen. If the percent field is blank, the Homeowner's value will NOT be updated and must be updated manually.

Duplicate Category in PM **WILL NOT UPDATE**

Duplicate categories exist in PM prior to rolling. You will need to update ALL the values in PM by hand. This includes review year, acres, total value, homeowner market value and exemption, as well as the circuit breaker market value.

OCC Code not eligible for HO, but PM has HO - updated **WILL UPDATE**

If the parcel rolling in from ProVal has a non-homeowner code but Parcel Master has an existing homeowner's exemption the parcel **WILL BE** updated. Verify that the exemption should apply to this parcel. If the exemption does not apply, update manually and change the homeowner record in PM. If the exemption does apply, verify that ProVal has been coded correctly and make any necessary changes. (The county may choose to send the taxpayer a letter if the homeowner's exemption is disallowed at this time.)

Check if category xx still eligible for HO

- a) Category 47 rolls in new and the existing category 46, 48, or 65 has a homeowner's exemption this edit will help you find these parcels to verify the homeowner's exemption for category 47.
- b) If a category had a homeowner exemption but is not coded for it now (on a sheet without a 'Dwelling' or 'Mhome').

SPECIAL CONSIDERATIONS:

If a parcel is other improvements only and had a homeowner's exemption last year, the homeowner value will update.

If a parcel has a 'Dwelling' or 'Mhome' and had a homeowner's exemption last year, the homeowner value will update – BUT ONLY ON THE SHEET WITH THE DWELLING OR MH.

ALL parcels with circuit breaker market value on land categories must be updated manually in parcel master.