

PMB095  
PM-TREND PARCEL MASTER BY CODE AREA

PROGRAM FUNCTION:

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

**Balancing procedures - before trending:**

(Use the same limits on all programs)

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

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

REQUIRED RESPONSES SUPPLIED BY OPERATOR:

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

- 01 Limits
- 02 Have the files been backed up? (Y or N)
- 03 Categories to trend
- 04 Values to trend range (From/To)
- 05 Factors by category (XX.XXXXXXXX)  
(e.g.: 95% = 0095000000 105% = 0105000000)
- 06 Do you wish to exclude review years? (Y or N)
  - a. If **Yes**: Key in up to 10 review years
  - b. If **Yes**: Do you wish to trend categories without review years? (Y or N)
- 07 Do you want all code areas? (Y or N)  
If 'N', key in the desired code areas.  
\*\*\*Enter leading zeroes (eg. 00100)\*\*\*
- 08 Do you want to update the values in Parcel Master during this trend execution?  
(Y or N)  
\*\*\*A report will print at this time\*\*\*  
If prompt #08 is **no**, then prompt #09 will be displayed
- 09 (Review this report to determine if the results are what you expected. If they are the correct results, re-execute the trend by typing in a "Y".)  
Do you wish 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 percentage 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 #06a - If the answer is "Y" then the system can exclude the trending of a category with the selected review year on individual parcels.

Prompt #06b - If the answer is "Y" then the system can include or exclude the trending of categories without review years.

Prompt #08 - This prompt gives the ability to execute the trend program without updating the values in the files.

Prompt #09 - 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.

OUTPUT SUMMARY:

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

PMB095 - Parcel Master Trend  
PMB095B - Parcels not Trended

PMB095

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

PMB095B

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.

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 PMB095B. 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 PROCDEURES:** (Use the same limits on all programs)

(continued from steps on page 1)

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

**Balancing Parcel Master:** (by category)

- PMB002 - Step 3 (from page 1)
- PMB095 - Old Market Value
- + PMB095 - New Market Value
- = PMB002 - Step 6 (page 4)

**Balancing Homeowner, Circuit Breaker, and Market Adjustment:****Homeowners:** (Both Total Market Value and Total Exemption, by category)

- PMB012 - Step 4 (from page 1)
- PMB095 - Old Value
- + PMB095 - New Value
- = PMB012 - Step 7 (page 4)

**Circuit Breaker:** (by category)

- PMB012 - Step 4 (from page 1)
- PMB095 - Old Market Value
- + PMB095 - New Market Value
- = PMB012 - Step 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.

TREND AREA \_\_\_\_\_

LIMITS: FROM \_\_\_\_\_

TO \_\_\_\_\_

TREND SELECTIONS:

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

DO YOU WISH TO EXCLUDE REVIEW YEARS?....(Y or N) . . . \_\_\_\_\_

IF YES:

\_\_\_\_\_

IF YES:

DO YOU WISH TO TREND CATEGORIES WITHOUT  
REVIEW YEARS ....(Y or N). . . \_\_\_\_\_

LOCATION CODES TO BE INCLUDED: INCLUDE ALL LOCATION CODES.. \_\_\_\_\_

FROM \_\_\_\_\_ TO \_\_\_\_\_ FROM \_\_\_\_\_ TO \_\_\_\_\_ FROM \_\_\_\_\_ TO \_\_\_\_\_

FROM \_\_\_\_\_ TO \_\_\_\_\_ FROM \_\_\_\_\_ TO \_\_\_\_\_ FROM \_\_\_\_\_ TO \_\_\_\_\_

FROM \_\_\_\_\_ TO \_\_\_\_\_ FROM \_\_\_\_\_ TO \_\_\_\_\_ FROM \_\_\_\_\_ TO \_\_\_\_\_

PARCEL TYPES TO BE INCLUDED: INCLUDE ALL PARCEL TYPES . . . \_\_\_\_\_  
IF NOT INCLUDING ALL PARCEL TYPES, MAKE YOUR SELECTIONS BELOW:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_