

PVB003
PV – ROLL VALUES FROM PROVAL TO PARCEL MASTER

PROGRAM FUNCTION:

This program rolls categories, review years, acres, and values from ProVal to Parcel Master (PM). This program **REQUIRES DEDICATED FILES**.

REQUIRED RESPONSES SUPPLIED BY OPERATOR:

- 01 Enter 'UPDATE' if you want to update Parcel Master values.
- 02 Do you want to print changed parcels only? (Y or N)

IF NOT UPDATE

- 03 Enter a tolerance (XXXXXXXX) or leave blank
- 04 Do you wish to exclude review years? (Y or N)
- 05 If 'Y', Enter review years to exclude (YYYY) up to five review years.

COMMENTS:

This program updates category, review year, acres, and values for each record in Parcel Master. All records rolled from ProVal to the AS/400 will be removed from the subsystems and placed in a history file.

OUTPUT SUMMARY (or NA):

This program spools the following six reports:

- 1) **Parcel Master Error Report (PVB003B)**
This report lists the parcels in Parcel Master that will not be updated, and their corresponding error messages. The parcel number, owner, legal description, category, and old and new values are listed.
- 2) **Values Update Audit Trail (PVB003)**
This report shows the changes that will be made to Parcel Master. The parcel number, owner's name and address, legal description, category, old and new values, old and new appraisal dates, and percentage of value change are listed on the report. Total old and new values are listed at the bottom of the report for each category. These totals are used for balancing purposes.
- 3) **Homeowner Exemptions & Circuit Breaker Values (PVB004A)**
This report displays the homeowner and circuit breaker values updated to reflect the value changes rolled into Parcel Master from ProVal. The parcel number, owner's name, total value, circuit breaker old and new value, homeowner old and new value, homeowner old and new exemption, and category are listed on the

report. Totals are listed on the bottom of the report for values and exemptions.

- 4) **Homeowner Exemptions & Circuit Breaker Values – Error Report (PVB004B)**
This report will list the errors separately from PVB004A to assist in finding and correcting the errors and make the process a bit easier to accomplish.

Possible Edit Messages for 3 and 4:

****Review Circuit Breaker Market Value and Adjust****

The circuit breaker market value is not equal to the homeowner market value, please review and adjust if necessary. CB land value **IS NOT** updated and must be done manually.

****Multiple Sheets Coded For Homeowners****

The parcel has duplicate categories rolling in from ProVal; the values for the duplicate categories will combine when they are rolled. However, the Homeowner market value may be less than the total value in PM. This will occur if one category has an occupancy code in ProVal which allows a homeowners exemption (ex. 1, 5, 11, 51, or 61) and the other category does not.

**** Check If Category 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.'

****OCC Code Not Elig for HO, But PM Has HO – Updated****

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.)

- 5) **Category File – Parcels Rolled (PVB020)**

This report displays a summary of values rolled from ProVal. The parcel number, category, review year, value, homeowner market value, homeowner exemption, circuit breaker, hardship market, and acres are listed on the report. Totals are listed at the bottom of the report for the homeowner market value, homeowner exemption, circuit breaker, hardship market, and acres. The number count represents all parcels from the ProVal Summary file (PV7VALUE), including those parcels that do not exist in the ProVal Detail file (PV8VALUE). A parcel without data will not be included in the Detail file.

6) Remove ProVal Parcels from RC, MH, RI and LD Subsystems (PVB091)

This report displays the number of records removed from each subsystem for every parcel downloaded from ProVal. These parcels are then placed in a history file. Totals are listed at the end of the report for residential characteristics, manufactured housing, residential/commercial land, and rural investment land.

SPECIAL CONSIDERATIONS:

It is imperative that the user clear the "assessment notice status" fields in the ProVal system. This is done during the last step of the ProVal Certification Checklist.

The following are possible error messages and their causes:

Duplicate Categories in Parcel Master

There are duplicate categories in Parcel Master. No update will be performed. The values, review years and acres in ProVal will need to be manually updated in Parcel Master.

No Use Code

ProVal does not have an occupancy status (use code) assigned to this improvement. Hand update ProVal with the correct occupancy status.

PM Cat not in PV

This category does not exist in ProVal. The category will not be deleted during the roll process. If the user wants to manually delete this category in PM, it is safe to do so now. If the user wants to create this category in ProVal, it can be done. However, the user will need to re-certify the parcel and hand update the review year, quantity, and value in PM after all the balancing steps are completed in the checklist.

PM Rev. Yr > PV

The review year in Parcel Master is greater than the review year in ProVal (Ex. PM 2001 > PV 2000) The review year in ProVal will roll in even if the year is less than the year in PM.

Parcel Master Missing

The parcel number does not exist in PM. If the parcel number is incorrect in ProVal, call the Tax Commission to assist with corrections in ProVal, PV8VALUE and PV7VALUE file. If the parcel number should have been created in PM during the assessment year, review parcel history in ProVal to find the information needed to make the necessary parcel number changes, splits, or merges in PMO200.