

NEW YEAR STARTUP CHECKLIST

This checklist will assist in preparing the files for the New Year. **The MSB008 can be run in December, but definitely needs to be run as soon as possible after the start of the New Year** to avoid errors in programs looking for current year files. It DOES NOT include rolling inactive parcels to active, which will be done later in the year. (March Startup, CL15.)

MSB008 1. Builds the Specials, Levy, Code Area/Urban Renewal, and Stumpage Value file members for the New Year. **REQUIRES DEDICATED FILES.**

TXQ001 A. List the new 2023 Specials File

TXB612 B. List and update the new 2023 Levy File
Run TXB612 using tax year 2023.

TXO010 1) Existing Taxing Districts
Using TXO010 (Levy) and looking at the TXB612, remove the levy amounts from each taxing district. These amounts are not known at this time. ****Make sure you are removing the levies from the new (2023) year, NOT the current taxing year (2022).**

2) New Taxing Districts ****Can wait until March Startup (after GIS sends out the new DON and LOC for 2023.)**
If a district is added, a new number needs to be assigned. This number and the name of the new district need to be keyed in the levy file. (Use F1 to view the supported number ranges for the different districts.) The district name that you key in using TXO010 will be what prints on all of the reports.

3) Deleted Taxing Districts ****Can wait until March Startup (after GIS sends out the new DON and LOC for 2023.)**
Use F23 if you want to remove the taxing districts that will not be used for 2023.

TXB612 C. Rerun TXB612 to proof your changes. You will also be reminded in later checklists (March Startup and Assessment Drive) to review/update this information.

YDO095 D. Update the current year stumpage value file with values received from Rod Brevig. (When available.) You will not use the 2023

CL4/400

stumpage value file until you are entering mill data harvested in the year 2023. (bottom of page, Form FT-102.)

<https://tax.idaho.gov/taxes/property/appraisers/property-appraisers-forestlands/>

- PMB186 2. Initialize Circuit Breaker for New Year - **REQUIRES DEDICATED FILES**
This program will prepare the Circuit Breaker records for the new cycle.

If you have any Occupancies with PTR, do NOT run this step (PMB186) until after they have had their tax bills created. (They can apply for occupancy PTR up until January 31.) If you run the clear out the CB file, you will need to reenter any Occupancy PTR parcels.

There is an option to clear the **Circuit Breaker market values** from the category file.

Counties using the On-line PTR Web application:

You **must** select “**Yes**” to clear the CB Market Values. The web application will populate the correct parcels when you upload the file from PTR. (If you do not clear these out, you might have parcels still getting the CB credit when they do not qualify for it in the New Year.)

Counties **NOT** using the PTR Web application:

Yes - Clear: If you choose to clear the CB market values, **you will need to re-enter values** for all those who apply/qualify for a 2023 circuit breaker exemption.

No – don’t clear: If you choose not to clear the market values, you will need to make sure you **hand clear values** for any **parcels that do not apply/qualify** for a 2023 circuit breaker exemption.)

When you run this program, it will clear the disallowed field, etc whether you answer “Y” or “N” to the market value prompt.

Here’s to a great 2023!!!