



# Income Greater Than \$250,000 Report (Report #2) Instructions

March 20, 2024

- [Overview](#).....1
- [Instructions for RPSV4 users](#).....1
  - [How to run the STAR Disqualification Update Utility](#).....2
  - [Discarded Transactions Report](#).....9

## Overview

The *Income Greater than \$250,000 Report (Report #2)* lists STAR recipients with incomes greater than \$250,000. By law, these property owners are no longer eligible for the STAR exemption.

Wherever possible, we will issue the report at least 20 days prior to tentative roll date. Review the report and remove the Basic and Enhanced STAR exemptions from the properties listed in the report.

After selecting your SWIS code, you can choose to view:

- *Only current* removals, or
- *All parcels* since the 2023 report was issued.

SWIS code:

Print key:

Mobile home or co-op:

Include:

Last name:

Sort:  On:

After making your desired selections and entering additional search criteria, the report returns the following fields:

- SWIS code
- Property Key
- Print key
- Mobile home co-op
- Property Address
- Names
- Property class on last roll
- Date of Report
- Levy Year

For the full report, select either *Download Report (Text)* or *Download Report (Excel)*. For more details, see [How to Access and Download STAR Reports](#).

RPSV4 users can run a utility to remove the Basic and Enhanced STAR exemption from impacted properties. See instructions below.

Users of other software must manually remove the Basic and Enhanced STAR exemptions from the properties listed in the report.

## Instructions for RPSV4 Users

To remove the Basic and Enhanced STAR exemptions from the properties listed in this report, run the *STAR Disqualification Update Utility*.

Before running the utility, you must:

- export the RPS Bulk File for Report #2,
- back up your database, and
- install all RPS software release updates. (See [Real Property System](#).)

Upon completion, exemptions and taxable values within the municipality will automatically be updated.

**Note:** Exemptions with an initial year equal to or greater than the current roll year will not be acted on in this update; review these parcels individually to determine if the exemption should be removed.

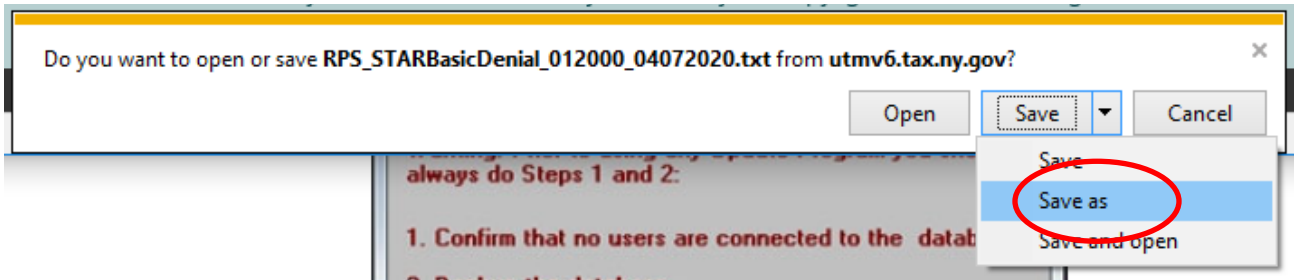
Additionally, exemptions for those parcels in a cooperative or manufactured home park will not be included in this update and must be reviewed and manually removed at the parcel level.

## How to run the STAR Disqualification Update Utility

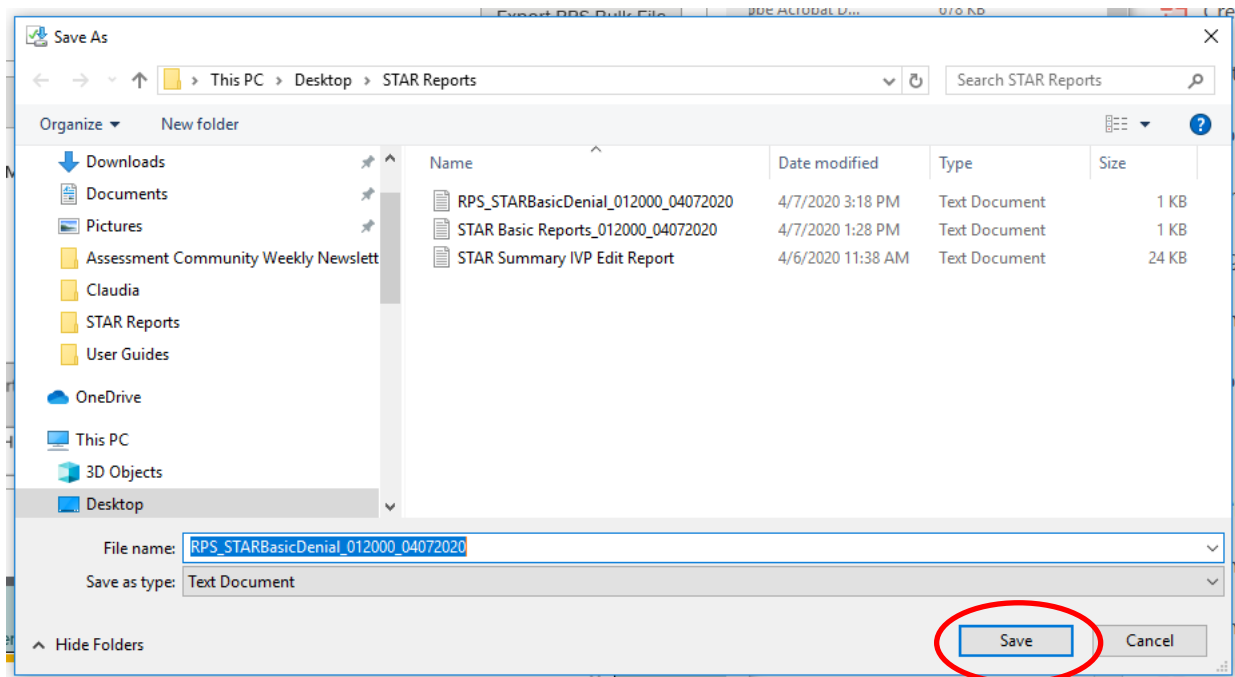
1. After selecting your SWIS code and search criteria and the results are displayed at the bottom of the page, select *Export RPS Bulk File*.

The screenshot shows a web interface with search controls. At the top, there are two dropdown menus: 'Sort: Ascending' and 'On: Print Key'. Below these are two buttons: 'Clear' and 'Search'. To the right of the 'Search' button, there is a button labeled 'Export RPS Bulk File' which is circled in red. Below the search controls is a section titled 'Report Information' with fields for 'Municipality:' and 'As of date:'.

2. Select *Save as*.

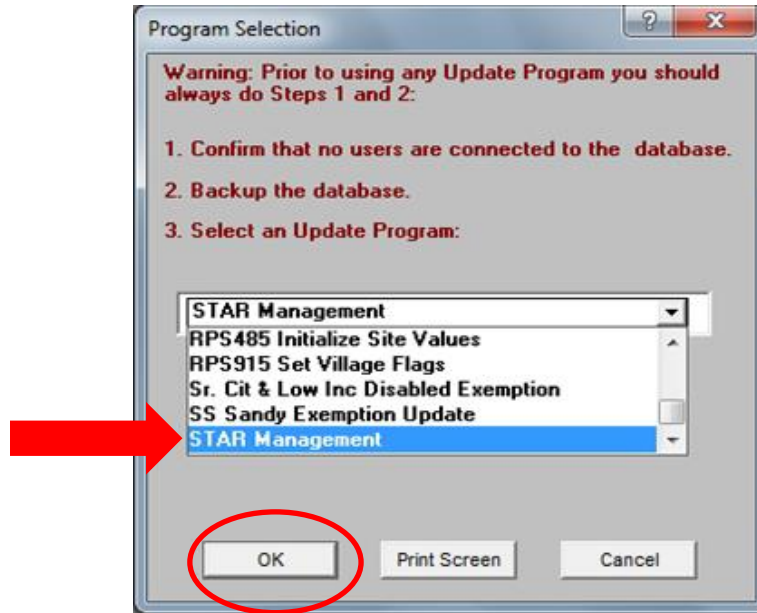


3. Designate where you want to store the file. (In the following steps, you'll need to remember where you stored it). Do not change the *Save as type*. Select *Save*.



4. In RPSV4, select *Administration* on the Navigation Screen to open the Administrative Toolbar.
5. Select *Update Programs*.

6. Scroll down and select *STAR Management*, and then select *OK*.



If you do not see the STAR Management option, verify that your *User Update Rights* are set for *STAR Management*. You may need to check with your Security Group Administrator.

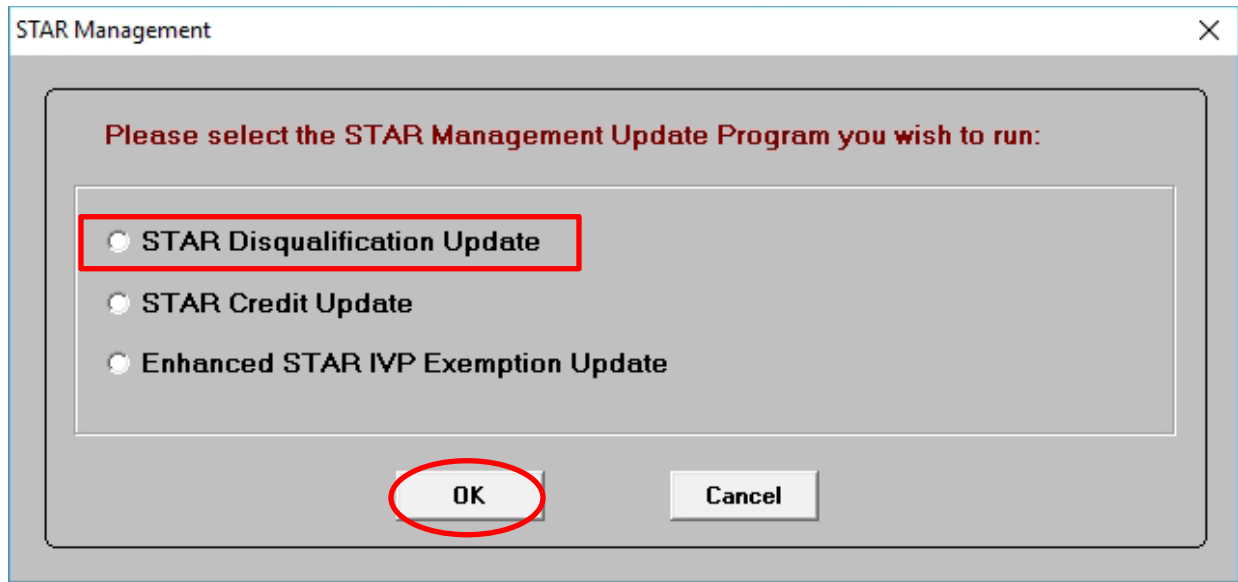
RPS Administration Version 4

## USER UPDATE RIGHTS

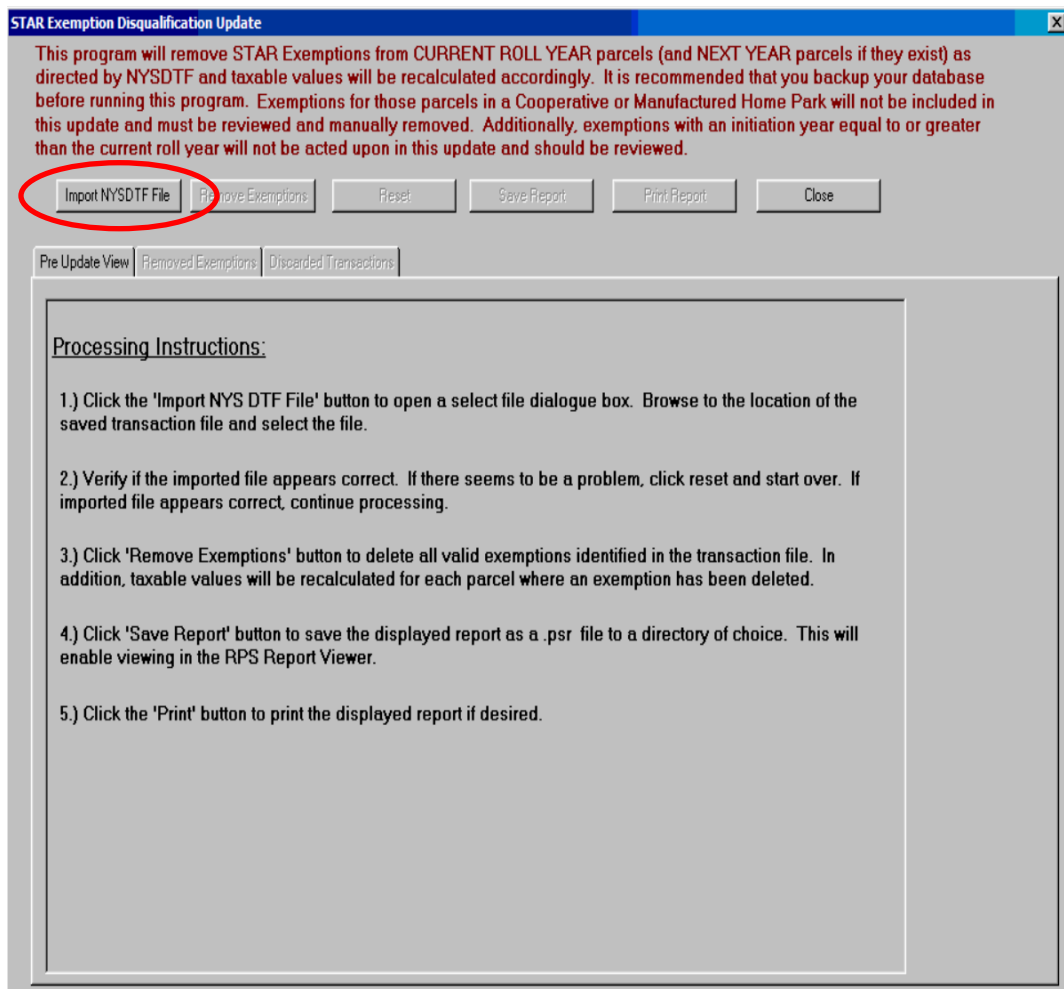
USER: [REDACTED] SWIS: [REDACTED]

	PYR		CYR		NYR	
Batch File Maintenance	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Business Investment Exemption	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Change Next Year File to Current Year File	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Home Improvement Exemption	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
LEED Exemption Update	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Next Year Processing	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Recalculate Exempts/Taxables	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Remove Roll Years	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Residential Investment Exemption	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
RPS190 Calculate Uniform %	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
RPS340 Calculate S458A/B Vet Exempts	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
RPS342/343 Change in Level Ex	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
RPS344 Agricultural Exemption	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
RPS349 STAR Exemption Update	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
RPS380 Update Utility	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
RPS460 Field Reviewed Value Generator	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
RPS485 Initialize Site Values	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
RPS915 Set Village Flags	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Sr. Cit. and Low Inc. Dis. Exempt	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
STAR Management	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Redevelopment of Inhibited Property Exemption	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Super Storm Sandy Exemption	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
RPS215 Final Assessors Report	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
RPS035 Sales Transmittal with Extract	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
General File Maintenance	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
	Add	Del	Add	Del	Add	Del
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Valuation Maintenance	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
GIS Maintenance	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Image Update			<input checked="" type="checkbox"/>			
	ALL		ALL		ALL	
	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
	NONE		NONE		NONE	
	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
Set By: [REDACTED]						
Set On: 7/6/2016 07:57:07						

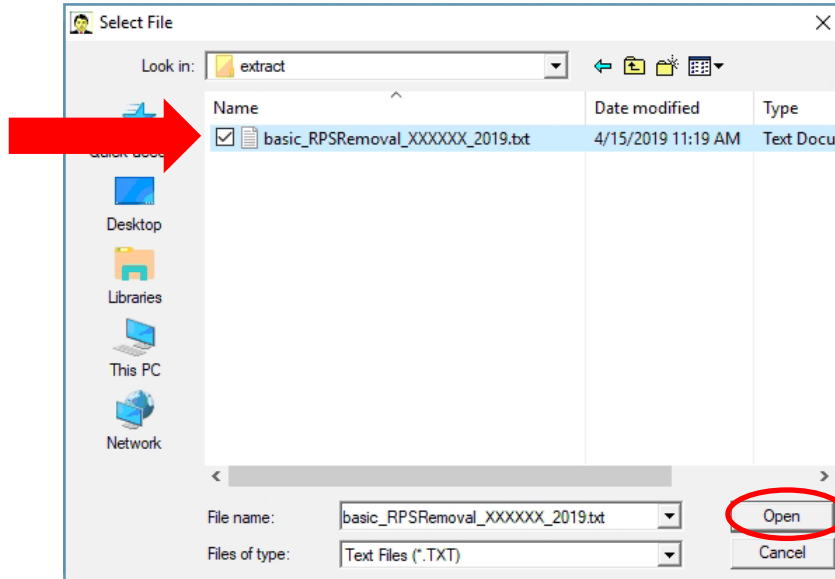
7. On the *STAR Management* screen, select *STAR Disqualification Update*. Select *OK*.



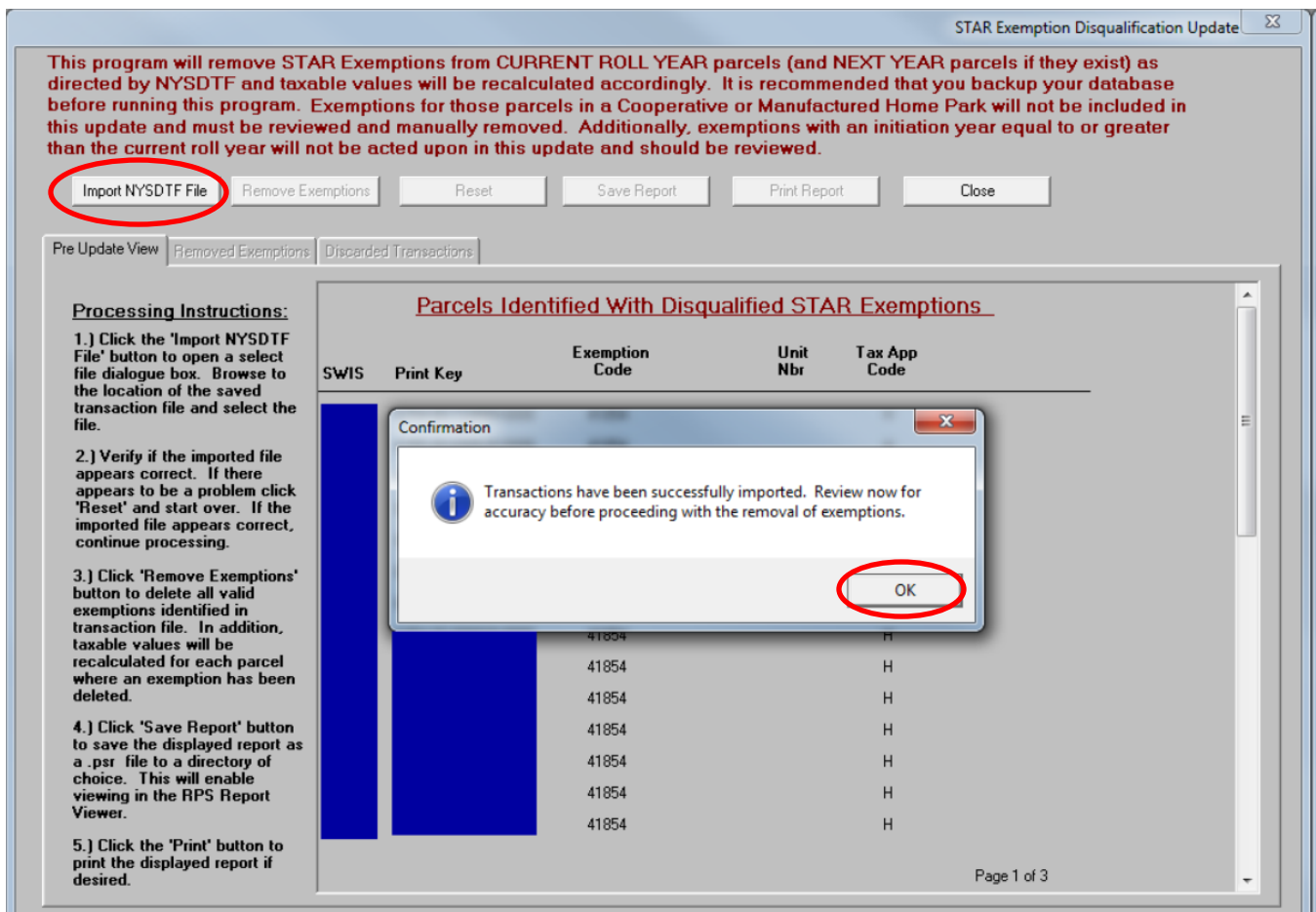
8. On the *STAR Exemption Disqualification Update* screen, select *Import NYSDTF File*.



9. Browse to the location where you stored the file, click on the file and select *Open*.



10. If the file appears appropriate\*, select *OK*. You should print and/or save the report as a PSR file because it will no longer be available after you close the utility.



\*If the file does not appear appropriate, "x" out of the confirmation message and go back to the *Import Enhanced STAR IVP File* and select the correct file. If you continue to have an issue, contact your [ORPTS Customer Service Liaison](#).

11. Select *Remove Exemptions* to update the database.

This Update program will first remove exemptions on the Current Roll year (and on the Next Roll year if it exists) from parcels listed on the transaction file and will then automatically run a recalculation of taxable values for all parcels in the municipality. The update program can take from five to twenty minutes depending on the size of the municipality (and may take longer if the Next Year roll exists).

After processing is complete, a report of the removed exemptions will display in the *Removed Exemptions* tab.

STAR Exemption Disqualification Update

**This program will remove STAR Exemptions from CURRENT ROLL YEAR parcels (and NEXT YEAR parcels if they exist) as directed by NYSDTF and taxable values will be recalculated accordingly. It is recommended that you backup your database before running this program. Exemptions for those parcels in a Cooperative or Manufactured Home Park will not be included in this update and must be reviewed and manually removed. Additionally, exemptions with an initiation year equal to or greater than the current roll year will not be acted upon in this update and should be reviewed.**

Import NYSDTF File Remove Exemptions Reset Save Report Print Report Close

Pre Update View Removed Exemptions Discarded Transactions

**Processing Instructions:**

1.) Click the 'Import NYSDTF File' button to open a select file dialogue box. Browse to the location of the saved transaction file and select the file.

2.) Verify if the imported file appears correct. If there appears to be a problem click 'Reset' and start over. If the imported file appears correct, continue processing.

3.) Click 'Remove Exemptions' button to delete all valid exemptions identified in transaction file. In addition, taxable values will be recalculated for each parcel where an exemption has been deleted.

4.) Click 'Save Report' button to save the displayed report as a .psr file to a directory of choice. This will enable viewing in the RPS Report Viewer.

5.) Click the 'Print' button to print the displayed report if desired.

NYS Real Property System      NYSDTF STAR Disqualified      1/30/2020  
County of [REDACTED]      Removed Exemptions Report  
Town of [REDACTED]  
SWIS Code - [REDACTED]

Print Key	Roll Year	Exemption Code Removed	Tax App Code
[REDACTED]	2019	41854	
[REDACTED]	2019	41854	
[REDACTED]	2019	41854	
[REDACTED]	2019	41854	
[REDACTED]	2019	41854	
[REDACTED]	2019	41854	
[REDACTED]	2019	41854	
[REDACTED]	2019	41854	
[REDACTED]	2019	41854	
[REDACTED]	2019	41854	
[REDACTED]	2019	41854	
[REDACTED]	2019	41854	

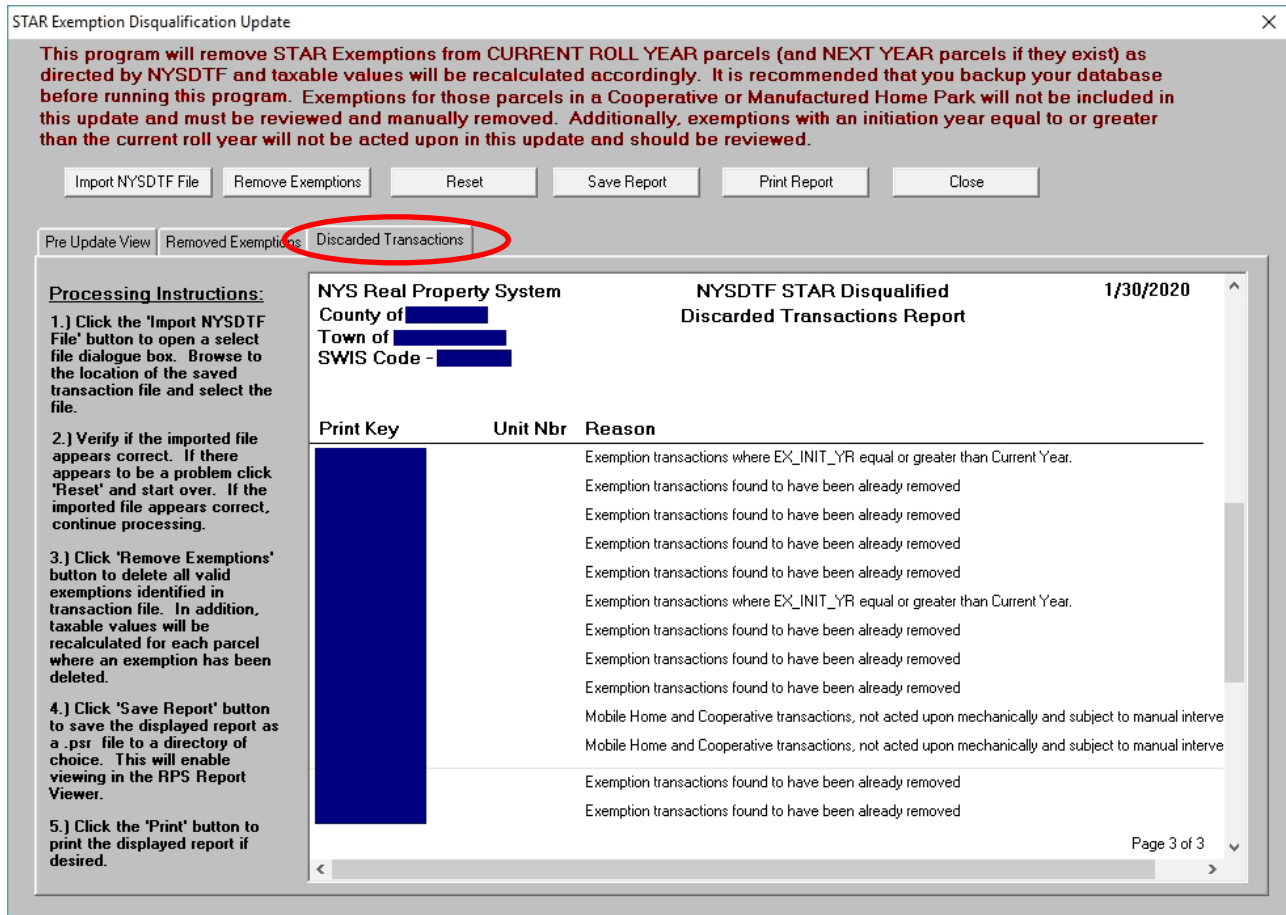
Number of exemptions removed from roll year 2019 : 14

Page 3 of 3



## Discarded Transactions file

Parcels listed on the imported transaction file that did not have the exemption removed will appear in the *Discarded Transactions* tab. You should print and/or save the report as a PSR file because it will no longer be available after you close the utility.



Parcels on the *Discarded Transactions Report* with any of the reasons below should be reviewed and manually updated if appropriate.

- If a parcel does not have a Basic or Enhanced STAR exemption, the following message will display in the Reason column:

*Exemptions transactions found to have been already removed*

- If a parcel listed on the imported transaction file is either a cooperative building (owner code = 'P' or 'Q') or a mobile home park (property class = 416), no action will be taken. The following message will display in the Reason column:

*Mobile Home and Cooperative transactions, not acted upon mechanically and subject to manual intervention.*

- Parcels where the basic exemption exists in the current year; however, the exemption initiation year is greater than or equal to the roll\_yr. This message will display in the Reason column:

*Exemption transactions where EX\_INIT\_YR equal or greater than Current Year*

To process another file for a different municipality, select *Reset*, and choose the new file.