![NEW YORK STATE Department of Taxation and Finance]

Instructions and File Specifications for the RPSV4 Users Co-op Spreadsheet

March 20, 2024

The Co-op Spreadsheet for RPSV4 Users will extract all cooperative units in your jurisdiction, regardless of whether the unit is receiving the STAR credit or exemption. This data is critical for the Office of Real Property Tax Services to confirm the eligibility of cooperative shareholders who register for the STAR credit.

These instructions are only for RPSV4 Co-op Worksheet users. If you do not use the RPSV4 Co-op Worksheet, or if you need to submit manufactured homes, please see other options.

If you submit a file that does not meet the format specifications in this document, we will have to reformat it. To avoid delays in STAR credit processing, follow the file specifications provided below. If you have questions, contact your ORPTS regional liaisons or email orpts.MHCoop@tax.ny.gov.

File Instructions

1. Before you use the Co-op Spreadsheet, open RPSV4 and ensure that the DSN is identified as *rps* in the RPSV4 logon window. If the DSN is not identified as *rps*, you will need to create an *rps* DSN. If you need assistance, contact your ORPTS regional liaisons.

2. Open the Co-op Spreadsheet. If you receive a *Security Warning* that *Data connections have been disabled* when you open the file, select **Enable Content.**

3. Right click in field A4 and select Refresh. If your version of Excel is earlier than Excel 2007, the **Refresh** option will be at the bottom of the list

4. When prompted for a roll year, enter the roll year against which the 2024-2025 school taxes will be extended. For most assessors, the roll year will be 2024.

5. To avoid processing delays:
   - Ensure that the format, field order, and field length correspond to the file specifications in the table below.
   - To the extent possible, use the same conventions for print key, street name, and unit number as previous years. Changes in these fields from one year to the next require manual processing.
   - Use unique print key and lot number combinations.

6. Follow these guidelines for the specified fields:
   - *Owner Occupied:* Populate with a "1" for yes, populate with a "0" for no.
   - *Market Value:* Assessed Value divided by the Uniform Percent. Use whole dollars, no decimal point, and no dollar sign.
   - *STAR Exempt Type:* If the unit has a STAR exemption, enter "B" for Basic STAR or "E" for Enhanced STAR. If the unit has the STAR credit or no STAR exemption, leave the field blank.
   - *Owner 1 name fields:* This is the first name that will appear on any checks issued. The name should be complete including a first and last name.

7. When entering data for *Name* fields, do not:
   - end a field in a special character (for example, *Smith, John &);*
   - include the words wife or husband, or any variation thereof (for example, *Wf, Wife, & Wife, H/W, WFE, housewife, &1, & one, +1, husband*);
   - include et al or et ux or any variation thereof (for example, *etal, et al, et-al, etux, et ux, et-ux, ux, ors,* or *others*);
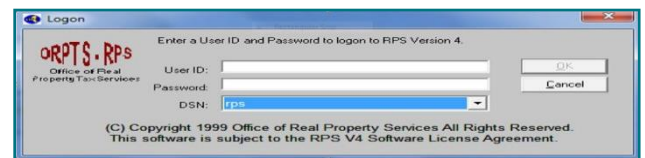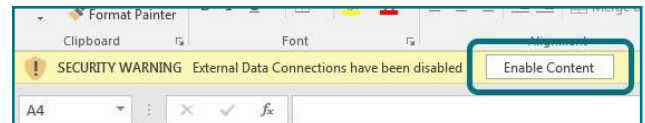
- include trustee names; however, you can enter a valid Trust name (trustee names should be in the *Additional Name* field); or
- include the name of a deceased person.

8. Save the report with this naming convention: XXXXXXCoop.xlsx (where XXXXXX represents your six-digit municipal or county code).
9. Review your final data and email the file to orpts.MHCoop@tax.ny.gov.

Co-op file specifications

Field name	Format	Length	Description
Roll year	text	4	the roll year against which the 2024-2025 taxes will be extended
Muni code	text	6	municipal code, first four digits of SWIS code + "00"
SWIS	text	6	6 digit SWIS code where the parcel is located **with leading zeros**
Owner occupied	text	1	"1" for yes, "0" for no
Print key	text	30	Print key, left justify and space fill (section-lot-block)
Unit percent total coop value	text	10	the unit # of shares divided by the total # of shares
Uniform percent	numeric	6,2	percent to the nearest hundreds place rounded to 2 decimal places
Assessed value	numeric	11	total assessment value of unit **before exemptions** (no decimal, rounded)
Co-op unit sch taxable value	text	11	taxable value for school tax purposes
Co-op num of shares	numeric	10	number of shares owned for unit
Market value	text	11	assessed value of unit divided by uniform percent (no decimal, rounded)
Co-op unit number	text	10	unique unit number
STAR exempt type	text	1	"B" for basic, "E" for enhanced, or leave blank
Street number dwelling	text	10	property address street number
Street name dwelling	text	20	property street name of dwelling
Street name suffix	text	20	property street suffix
City/town	text	30	municipality where dwelling is located
State	text	2	state of dwelling (must be NY)
ZIP code	text	9	ZIP code of dwelling (this can be 5 or 9 characters, no hyphen)
Mailing street number	text	10	owner's mailing street number
Mailing street name	text	30	owner's mailing street name
Mailing street suffix	text	6	owner's mailing street
Mailing unit name/num	text	10	owner's mailing unit number
Mail PO box	text	10	owner's PO box
Mail city	text	30	owner's mailing city/town
Mail state	text	2	owner's mailing state
Mail ZIP code	text	9	owner's mailing ZIP code (this can be 5 or 9 characters, no hyphen)
Owner 1 primary res	text	1	populate with a "1" for yes, populate with a "0" for no
Last name 1	text	30	first property owner's last name
First name 1	text	20	first property owner's first name
Middle initial 1	text	1	first property owner's middle initial
Suffix name 1	text	8	first property owner's suffix
Owner 2 primary res	text	1	populate with a "1" for yes, populate with a "0" for no
Last name 2	text	30	second property owner's last name
First name 2	text	20	second property owner's first name
Middle initial 2	text	1	second property owner's middle initial
Suffix name 2	text	8	second property owner's suffix
Comment field	text	variable	any useful comments