



**Department of  
Taxation and Finance**

# **Basic STAR Reports User Guide**

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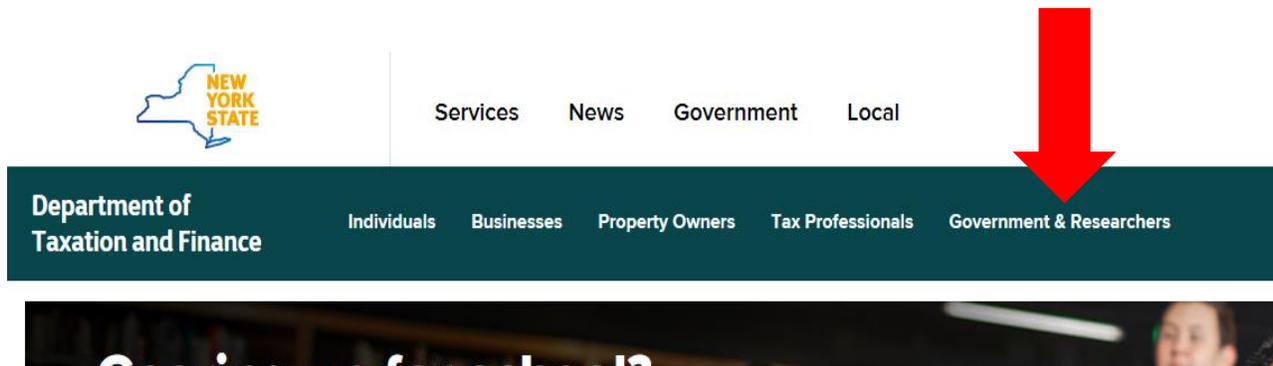
# Introduction

The Basic STAR Reports can be viewed or downloaded and are for use by assessors and other authorized users to update and verify assessment rolls.

The STAR Eligibility tool within the online assessment community site is highly secure. The Tax Department is charged with processing and guarding the personal information of millions of taxpayers. Similar standards and practices are in place for the STAR eligibility tool and the data it contains.

# Accessing the Basic STAR Eligibility Reports

1. Go to the Department of Taxation and Finance website: [www.tax.ny.gov](http://www.tax.ny.gov)
2. Select the *Government & Researchers* link.



3. Under the online services column, select *Assessment community login*.

## ONLINE SERVICES

- > [Assessment community login](#)
- > [Municipal Profiles](#)
- > [Find sales tax rates](#)
- > [Sales Tax Web File](#)
- > [Other online services](#)
- > [Watch demos and videos](#)
- > [Troubleshooting Tips](#)



4. Select *LOG IN TO ASSESSMENT COMMUNITY*.

## Online Services for assessors and county directors

Log in to or create an Assessment Community Online Services account—today!

Benefits include access to:

- Basic and Enhanced STAR income verification applications
- real property transfer data
- parcel and sales inventory data
- training portal
- sales reports
- state land reports
- valuation guidelines
- school district levy simulator
- Assessors' Manual collection

LOG IN TO ASSESSMENT COMMUNITY

REQUEST ACCOUNT

Forgot your password? Call 518-591-5233 or email [Real.Property@tax.ny.gov](mailto:Real.Property@tax.ny.gov) to reset it.

**(Note:** If you need an account, or to make changes to an existing account, select *REQUEST ACCOUNT* for instructions.)

5. Select the *STAR Eligibility* bubble.



6. Click on the middle box: *Click for Basic STAR Eligibility Reports.*

ORPTS Online

Assessment Community Resource Center

STAR Eligibility Program Selection Screen

[ORPTS OnLine Home](#) | [STAR for Assessors](#) | [ORPTS Internet](#) | [Secure Access Applications](#) | [Previous Page](#)

Click for Enhanced STAR IVP Tool

Click for Basic STAR Eligibility Reports

Click for STAR Credit Reports

[STAR IVP Help](#)      [Basic STAR Help](#)      [STAR Credit Help](#)

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[Questions/Comments Secure Assessment Community](#) | [All Contents Copyright © NYSORPTS 2018](#)

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[Privacy and Security](#) | [ORPTS Home](#) | [Top](#)

7. Read the security contract and select *Yes, I agree.*

ORPTS Online

New York State

Office of Real Property Tax Services

Enhanced STAR IVP - *Security Contract*

[STAR Help](#) | [STAR for Assessors](#) | [ORPTSOnLine Home](#) | [Secure Access Applications](#)

NYS ORPTS has designated this application for "**Secure Access**", meaning that this application is available only to Real Property Assessors, or their authorized designees. Registered users agree to protect the confidentiality of applicant's tax information, to only use such information for the purposes of determining STAR eligibility, and not to use or disclose such information for any other purpose. Any unauthorized disclosure of such information shall be deemed a violation of section 805-A of the General Municipal Law. Any member of the Assessment Community who has access to this application, or has granted access to their staff, must immediately notify The New York State Office of Real Property Tax Services when they, or their staff, are no longer required/approved to enter STAR exemption data. For security reasons, if you leave your workstation, you are required to log off the application.

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8. Select your Muni Code then select *Basic STAR Reports*.

**ORPTS**  
*Culture*

**New York State**  
Office of Real Property Tax Services

### Basic STAR Eligibility - *Pick Muni Code*

[STAR Help](#) | [STAR for Assessors](#) | [STAR Program Selection](#) | [ORPTSONline Home](#) | [Secure Access Applications](#)

you are responsible for maintaining records in the muni codes below. Please pick the one you would like to use:

- 010100...Albany
- 010300...Cohoes
- 011800...Watervliet
- 012000...Berne
- 012200...Bethlehem
- 012400...Coeymans
- 012401...Ravena
- 012600...Colonie
- 012601...Colonie
- 012603...Menands

**Basic Star**

Basic STAR Reports

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[Questions/Comments on STAR Eligibility](#)      [All Contents Copyright © NYSORPTS 2019](#)

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# Basic STAR Eligibility Reports Overview

There are two reports available:

- The **Basic STAR (bSTAR) bulk delete transaction file** is available for download only and should be used to update your assessment roll. Instructions for utilizing this report in the RPS STAR Management utility are on page 16 of this guide.
- The **Basic STAR (bSTAR) Status Report** is available to view or download. This report contains only records who are determined to be “not qualified” due to income requirements.

The screenshot shows the ORPTS Online New York State Office of Real Property Tax Services website. The main heading is "Basic STAR Eligibility - Reports for Muni Code 012200". Below this, there are two main report options:

- Basic STAR (bSTAR) bulk delete transaction file**: Programmatically removes STAR exemption from ineligible parcels in a batch file. A "Download" button is present.
- Basic STAR (bSTAR) Status Reports**: Not Qualified. Displays only records with a Basic STAR status of "N". "View" and "Download" buttons are present.

At the bottom of the report selection area, there are "Help" and "Change MuniCode" buttons.

Footer text includes: "Questions/Comments on Star Eligibility", "All Contents Copyright © NYSORPTS 2019", "Privacy and Security", "ORPTS Home", and "Top".

# View the Reports

1. Select *View*

**ORPTS** *Online* **New York State**  
Office of Real Property Tax Services

## Basic STAR Eligibility - Reports for Muni Code 012200

[STAR Help](#) | [STAR for Assessors](#) | [STAR Program Selection](#) | [ORPTS OnLine Home](#) | [Basic STAR Eligibility Home](#) | [Secure Access Applications](#) | [Logout](#)

Basic STAR (bSTAR) bulk delete transaction file	
Programmatically removes STAR exemption from ineligible parcels in a batch file	<a href="#">Download</a>

Basic STAR (bSTAR) Status Reports	
Not Qualified	Displays only records with a Basic STAR status of "N"
	<a href="#">View</a> <a href="#">Download</a>

[Help](#) [Change MuniCode](#)

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[Questions/Comments on Star Eligibility](#) [All Contents Copyright © NYSORPTS 2019](#)

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[Privacy and Security](#) | [ORPTS Home](#) | [Top](#)

# Download the reports

1. Select *Download* for the desired report.

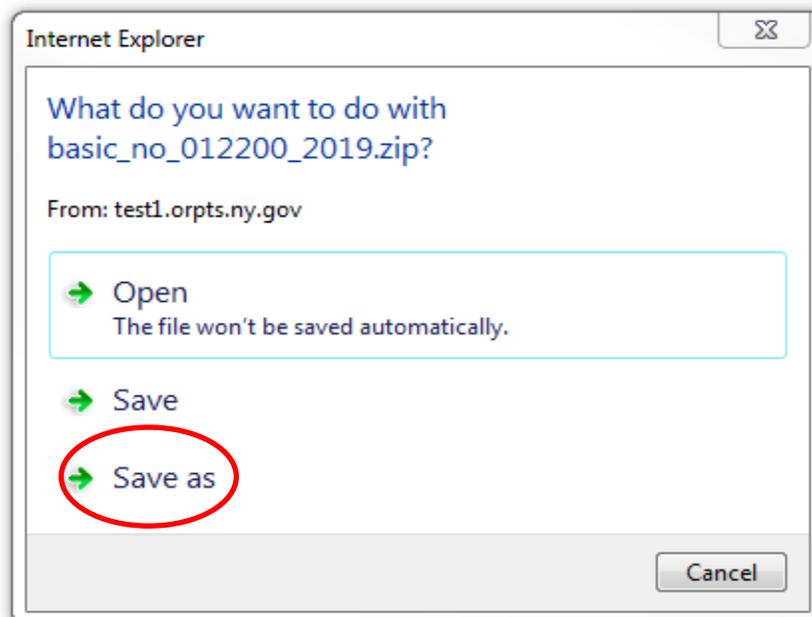
The screenshot shows the ORPTS New York State website interface. At the top, the logo for ORPTS Online is displayed next to the text "New York State" and "Office of Real Property Tax Services". Below this, the main heading is "Basic STAR Eligibility - Reports for Muni Code 012200". A navigation bar contains links for "STAR Help", "STAR for Assessors", "STAR Program Selection", "ORPTS OnLine Home", "Basic STAR Eligibility Home", "Secure Access Applications", and "Logout".

Two report options are listed in a table-like format:

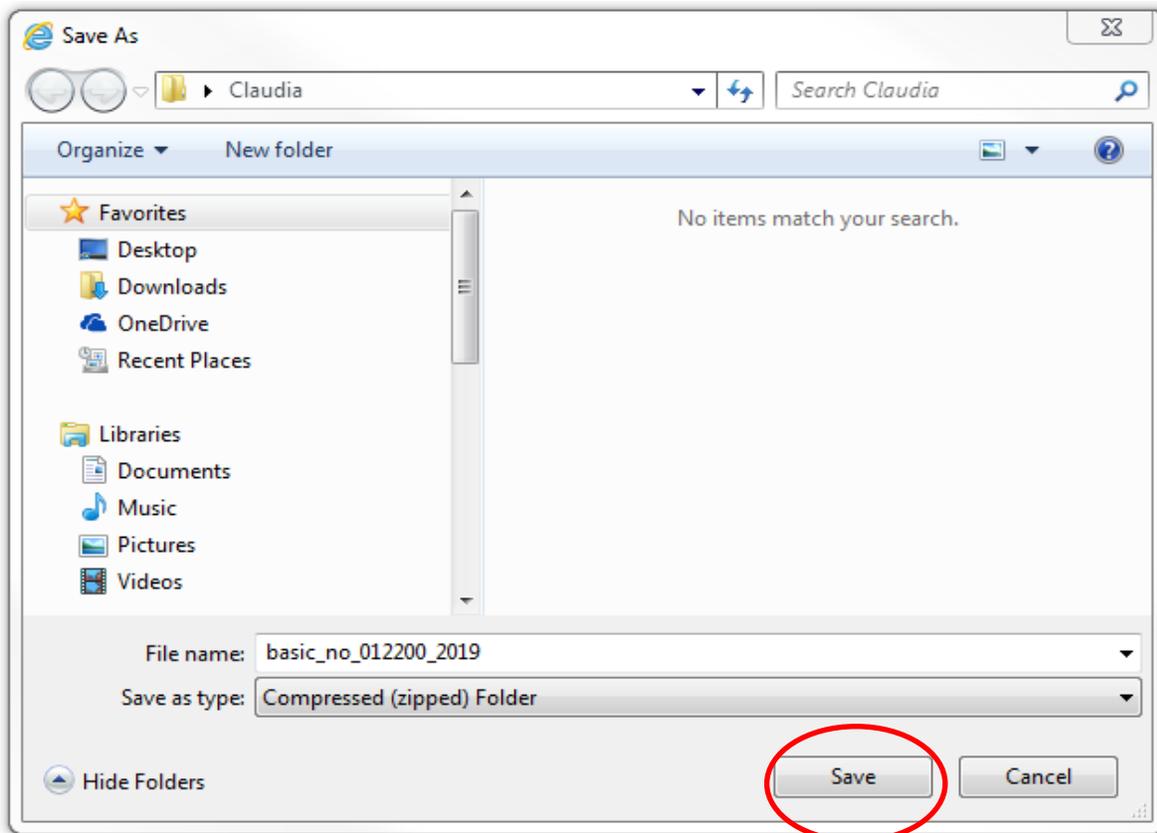
- Basic STAR (bSTAR) bulk delete transaction file**: Description: "Programmatically removes STAR exemption from ineligible parcels in a batch file". A "Download" button is present.
- Basic STAR (bSTAR) Status Reports**: Description: "Not Qualified Displays only records with a Basic STAR status of 'N'". It has "View" and "Download" buttons. The "Download" button is circled in red.

Below the reports are "Help" and "Change MuniCode" buttons. At the bottom, there are links for "Questions/Comments on Star Eligibility", "All Contents Copyright © NYSORPTS 2019", "Privacy and Security", "ORPTS Home", and "Top".

2. In the pop-up box select *Save as*.



3. Designate where you want to store the file. The file will automatically be zipped. Do not change the *Save as type*. Select *Save*.

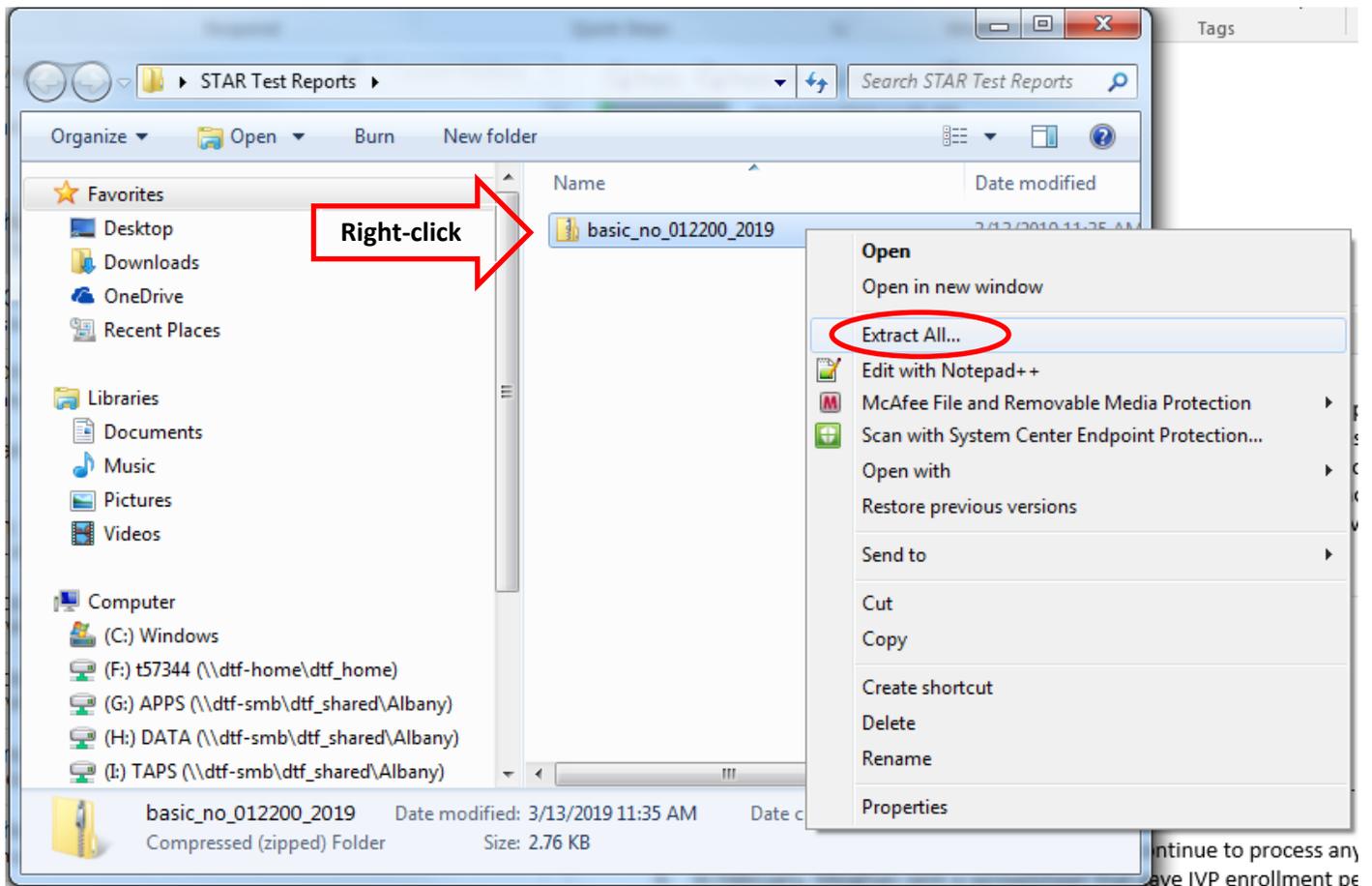


3. Before opening the file, you will need to unzip it. If the Open folder pop-up option appears, select *Open folder*,

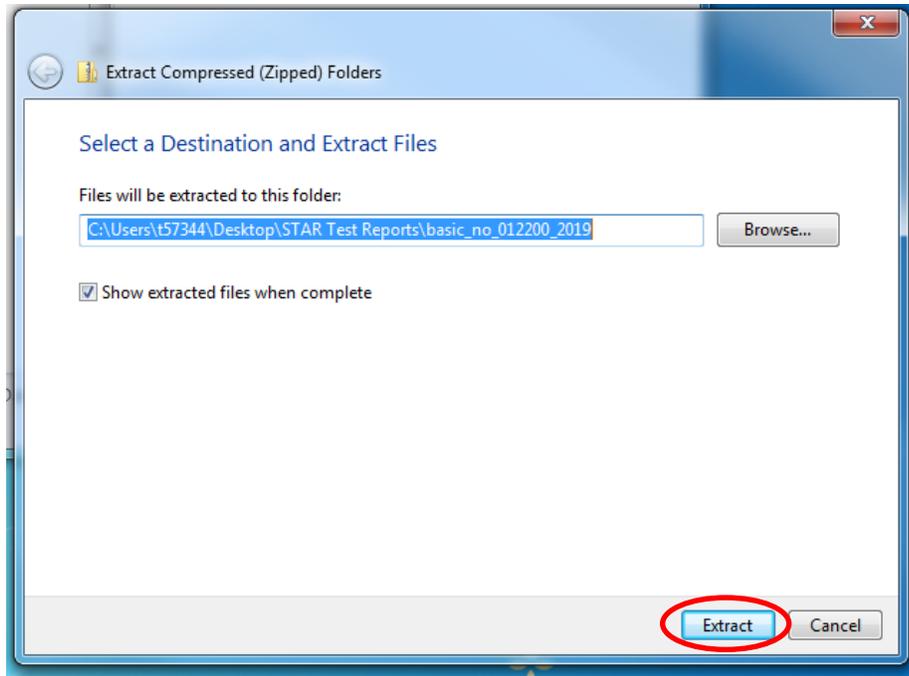


**OR**

If the Open folder pop-up option does not appear, navigate to where you stored the file, right-click the file and select *Extract All* from the list of options.

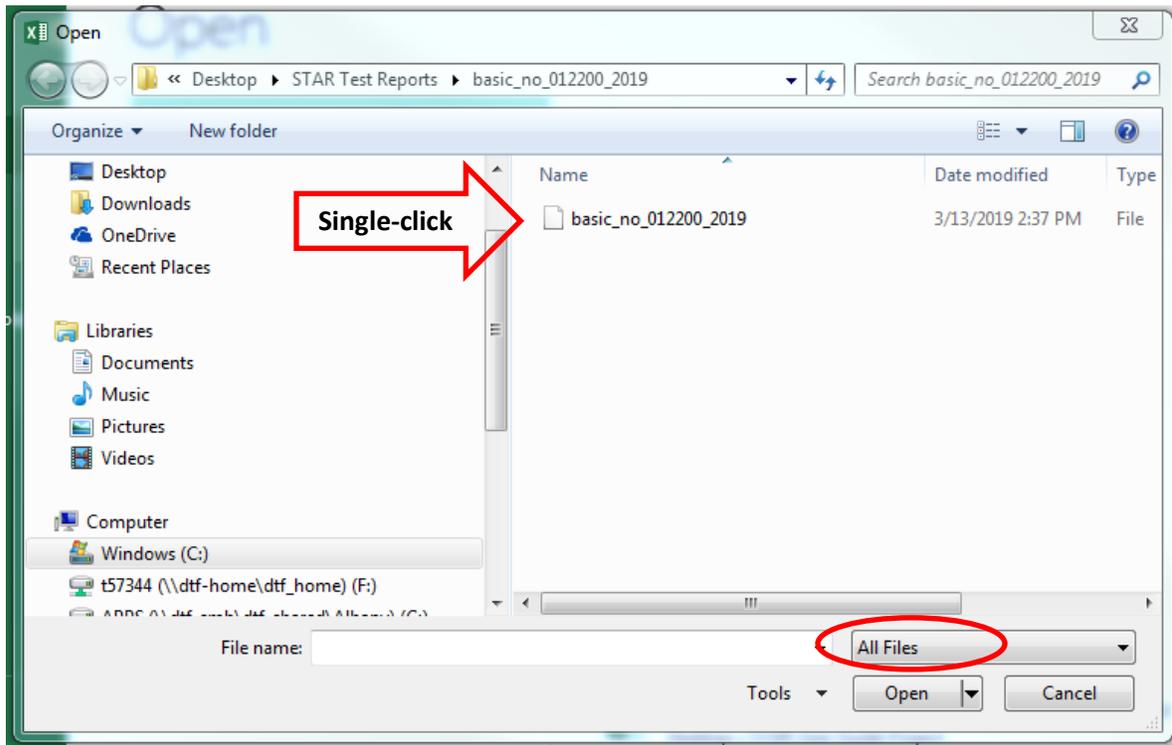


4. In the pop-up window, select *Extract*. Close the folder.



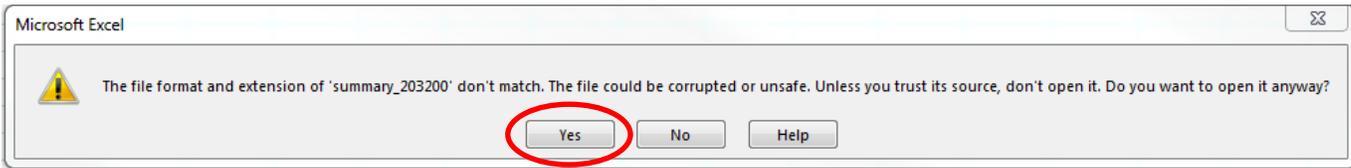
5. Open Microsoft Excel.

6. Browse to the file location and single-click on the file – *not* the compressed type. (If the file is not displayed, be sure *All Files* is selected).

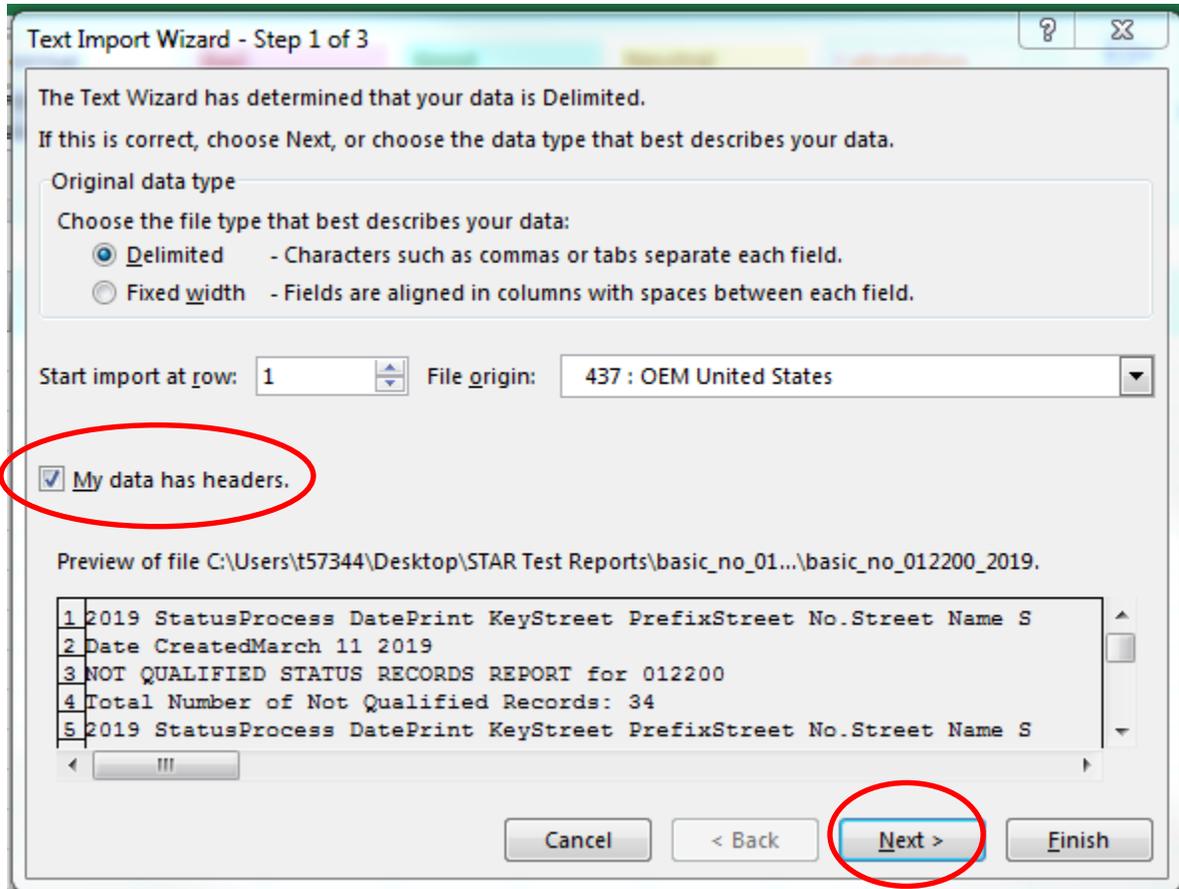


7. Select *Open*.

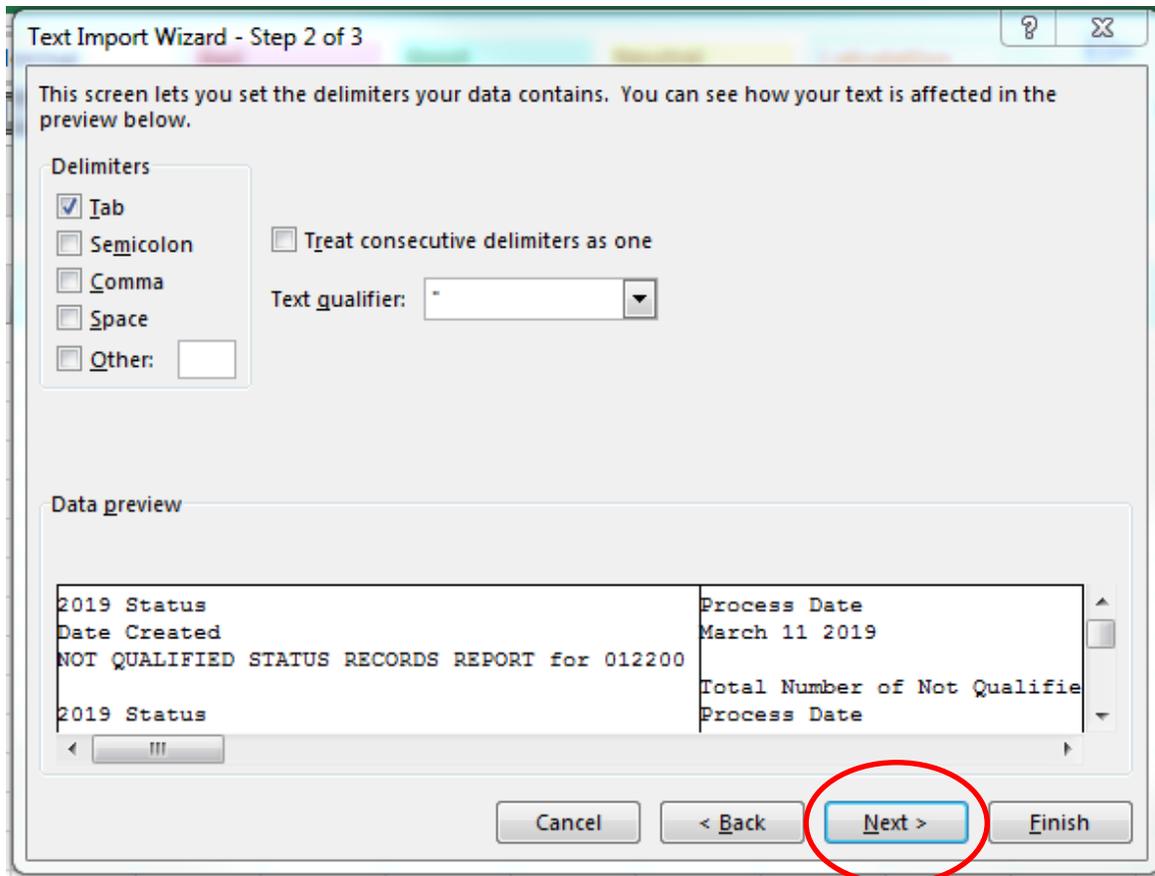
8. If you get the following message, select *Yes*.



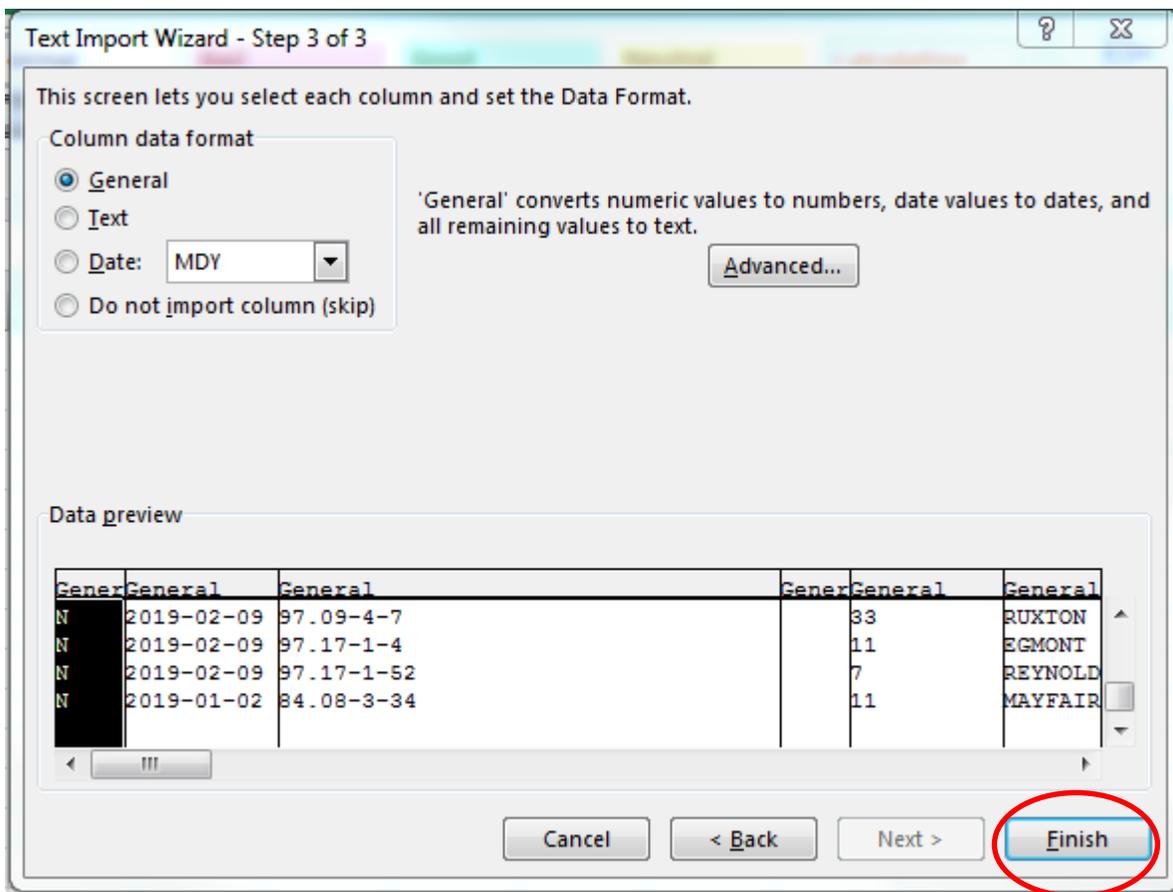
9. The *Text Import Wizard* – Step 1 of 3 will open, select *My data has headers*, then select *Next*.



10. The Text Import Wizard – Step 2 of 3 will open, select *Next*.



11. The Text Import Wizard – Step 3 of 3 will open, select *Finish*.



12. Print or save your report.

- If any of the columns have pound signs (#) – widen the column so the digits for date and time appear.
- Remember to keep the report secure if it contains confidential data.

# Instructions for the Bulk Delete Transaction File for RPS Processing

**Note:** Before executing this update program, you must:

1. have already downloaded the *Basic STAR (bSTAR) bulk delete transaction file* from the STAR Eligibility tool in the Online Assessment Community. For download instructions, see page 9 of this guide; and
2. installed all RPS software release updates. See [Real Property System](#).

Use this program to remove STAR exemptions from current roll year parcels (and next year parcels if they exist) as directed by the Tax Department. Upon completion, exemptions and taxable values within the municipality will automatically be updated.

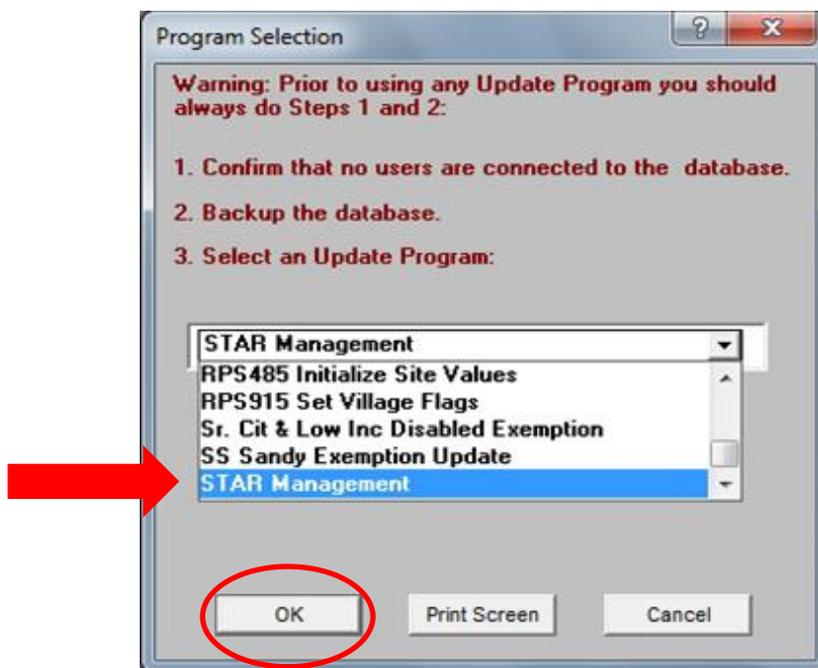
Exemptions for parcels in cooperatives or manufactured home parks will not be included in this update and must be reviewed and manually removed at the parcel level.

Exemptions with an initial year equal to or greater than the current roll year will not be acted on in this update; these parcels need to be reviewed at the parcel level to determine if the exemption should be removed.

**\*\*Before running this program, you should backup your database.\*\***

To begin:

1. Select *Administration* on the Navigation Screen to open the Administrative Toolbar.
2. Select *Update Programs*.
3. Scroll down and select *STAR Management*, then select *OK*.



**Note:** 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.

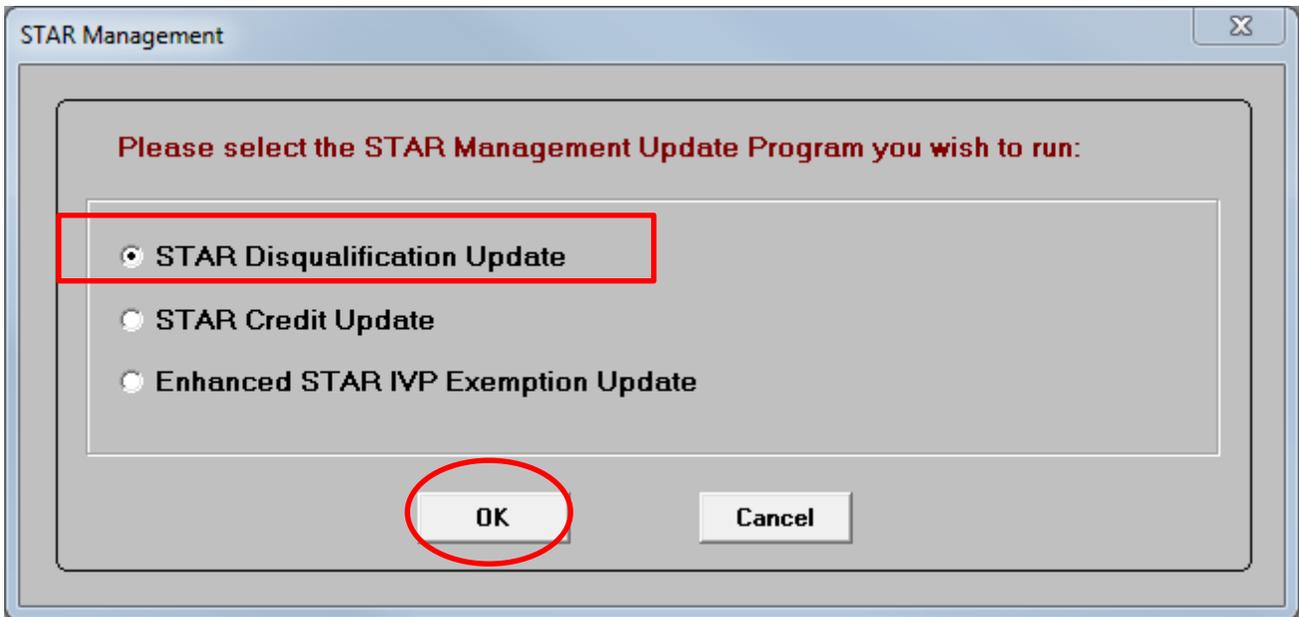
RPS Administration Version 4

## 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"/>					
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						

4. On the *STAR Management* screen, select *STAR Disqualification Update*.



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

**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.

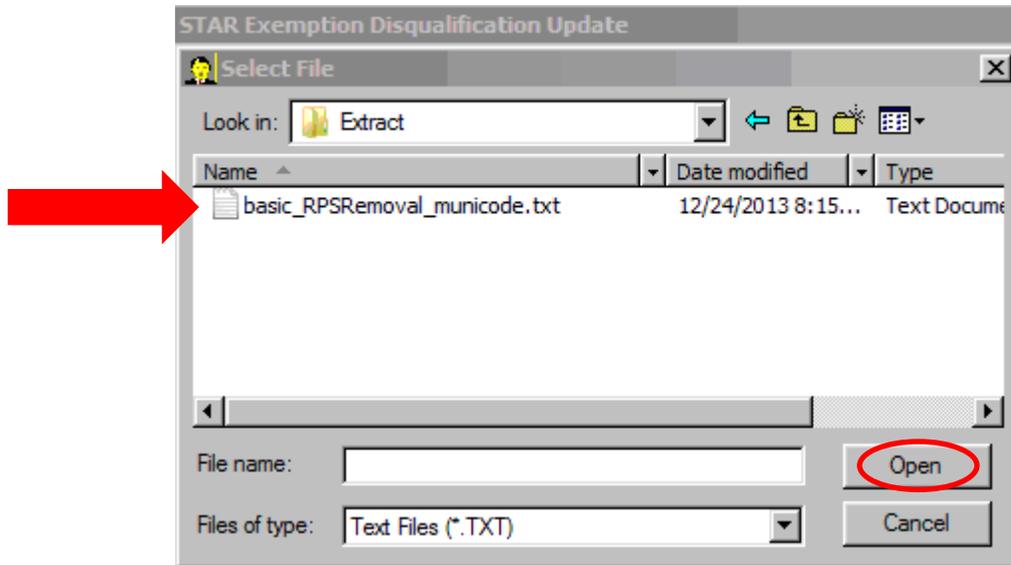
Buttons: **Import NYSDTF File**, Remove Exemptions, Reset, Save Report, Print Report, Close

Navigation: Pre Update View, Removed Exemptions, Discarded Transactions

**Processing Instructions:**

- 1.) Click the 'Import NYS DTF 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 seems to be a problem, click reset and start over. If imported file appears correct, continue processing.
- 3.) Click 'Remove Exemptions' button to delete all valid exemptions identified in the 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.

6. Select the file you would like to import and select *Open*.



After the file is imported, the contents of the file will appear on the *Pre Update View* screen. If there are numerous parcels, you must select *OK* before you can scroll through the list. Selecting *OK* does not update any data, and if necessary, you can select *Reset* to choose a different file or close out of the program without consequence. The number of parcels on the file will be summarized at the end.

7. If the file appears appropriate\*, select *OK*. You can print and/or save the report.

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.

**Parcels Identified With Disqualified STAR Exemptions**

SWIS	Print Key	Exemption Code	Unit Nbr	Tax App Code
		41854		H

Page 1 of 3

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

8. 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 (longer if Next Year roll exists).

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

**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.

Print Key	Roll Year	Exemption Code Removed	Tax App Code
[Redacted]	2017	41854	H
[Redacted]	2017	41854	H
[Redacted]	2017	41854	H
[Redacted]	2017	41854	H
[Redacted]	2017	41854	H
[Redacted]	2017	41854	H
[Redacted]	2017	41854	H
[Redacted]	2017	41854	H
[Redacted]	2017	41854	H
[Redacted]	2017	41854	H
[Redacted]	2017	41854	H
[Redacted]	2017	41854	H



All three report tabs are accessible for comparison. You should print and/or save the reports as a PSR file before closing. If you close the utility without saving the report(s), they will no longer be available for accessing.

If you will be processing a file for another municipality, select *Reset*. This will clear all reports and initialize the program so you can import the next file.

## **Administration, forms, and FAQs**

For additional information regarding Basic STAR such as:

- Exemption Amounts
- Administration
- Maximum STAR Savings and the 2% Limit

See [STAR information for local officials.](#)