

# STAR Credit Eligible Report (Report #8) Instructions

March 31, 2025

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## Overview

The STAR Credit Eligible Report is available prior to school tax bill processing so that the bills for STAR credit recipients can include the following statutory language:

*An estimated STAR check has been or will be mailed to you by the NYS Tax Department. Any overpayment or underpayment can be reconciled on your next tax return or STAR credit check.*

**If a registered property owner does not appear on your list, this does not mean they won't receive a STAR credit check this year; we continue to approve registrations daily after this report is issued.**

Wherever possible, we will issue the report one month prior to the date school tax bills are issued. 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

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

## What to do next

Use the report to update your files before school tax bills are processed. County staff responsible for database updates must select municipal transaction files individually.

RPSV4 users, see the instructions beginning on page 2.

Localities that do not use RPSV4 will use the report to update their roll files.

**Note:** Because tax bills do not include the dollar amount of the STAR credit, you will not indicate whether the property owner will receive the Basic or Enhanced STAR credit. Therefore, only the 99999 code is necessary to designate property owners who will receive either the Basic or Enhanced STAR credit.

## Instructions for RPSV4 users

To update the affected parcels, RPSV4 users can use the STAR Credit Update Utility. You will have the option to select the roll year against which transactions will be applied. Processing instructions are also contained within the STAR Credit Update user interface.

Prior to adding new marker codes, this program will remove any existing marker codes currently on the database within the municipality except for mobile homes and cooperative units – you must remove these manually at the parcel level.

During the update process, any existing STAR exemption on a parcel targeted to have a marker code added will have that STAR exemption removed prior to the addition of a marker code.

Following the addition of new marker codes, this update program will automatically run a recalculation of exemptions and taxables within the municipality.

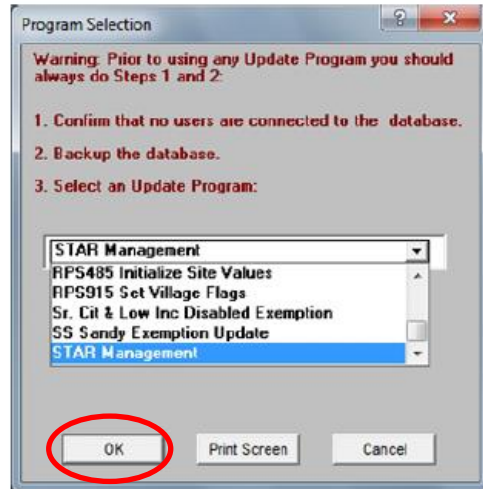
**Before running the utility**, you must:

- export the RPS Bulk File for Report #8,
- back up your database, and
- install all RPS software release updates. (See [Real Property System.](#))

**Note:** Marker codes for those parcels in a Cooperative or Manufactured Home Park will not be included in this update and must be reviewed and manually added at the parcel level.

## How to run the RPSV4 STAR Credit Update Utility

1. Select *Administration* on the Navigation Screen to open the Administration 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 or check with your Security Group Administrator.

RPS Administration Version 4

### USER UPDATE RIGHTS

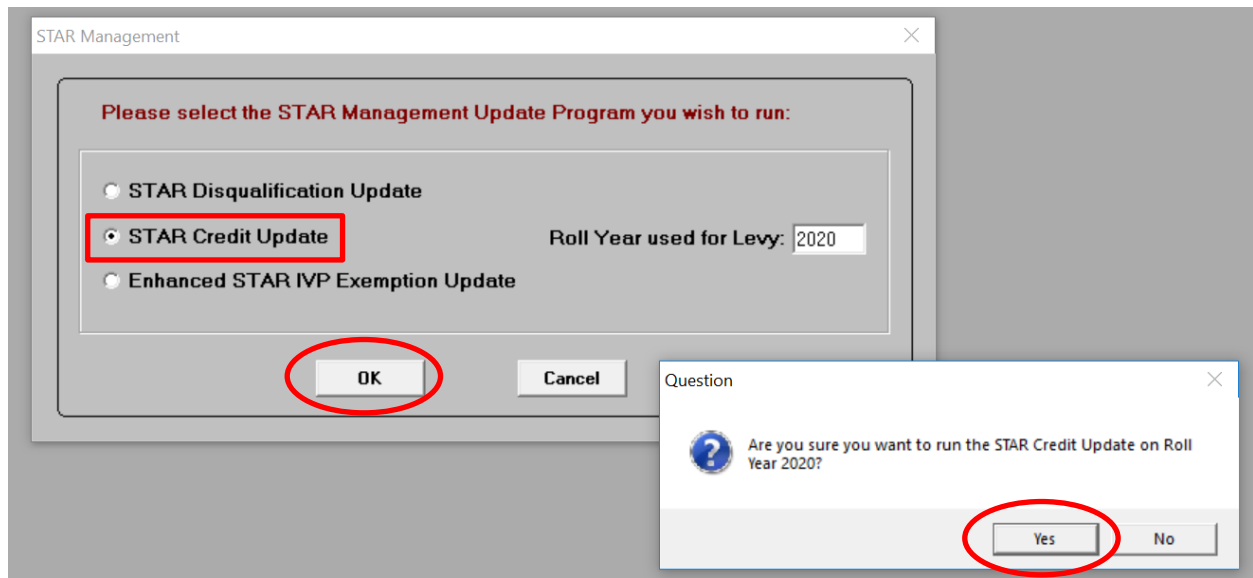
USER: [redacted] SWIS: [redacted]

|   | 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"/>   |
| RPS199 Calculate Uniform %                    | <input checked="" type="checkbox"/>   | <input checked="" type="checkbox"/>   | <input checked="" type="checkbox"/>   |
| RPS340 Calculate S4584B 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 Inhabited 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"/>   |
| RPS635 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 <input checked="" type="checkbox"/> Del <input checked="" type="checkbox"/> | Add <input checked="" type="checkbox"/> Del <input checked="" type="checkbox"/> | Add <input checked="" type="checkbox"/> 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"/>   | <input checked="" type="checkbox"/>   | <input checked="" type="checkbox"/>   |
|   | ALL <input checked="" type="checkbox"/> NONE <input type="checkbox"/>           | ALL <input checked="" type="checkbox"/> NONE <input type="checkbox"/>           | ALL <input checked="" type="checkbox"/> NONE <input type="checkbox"/>           |

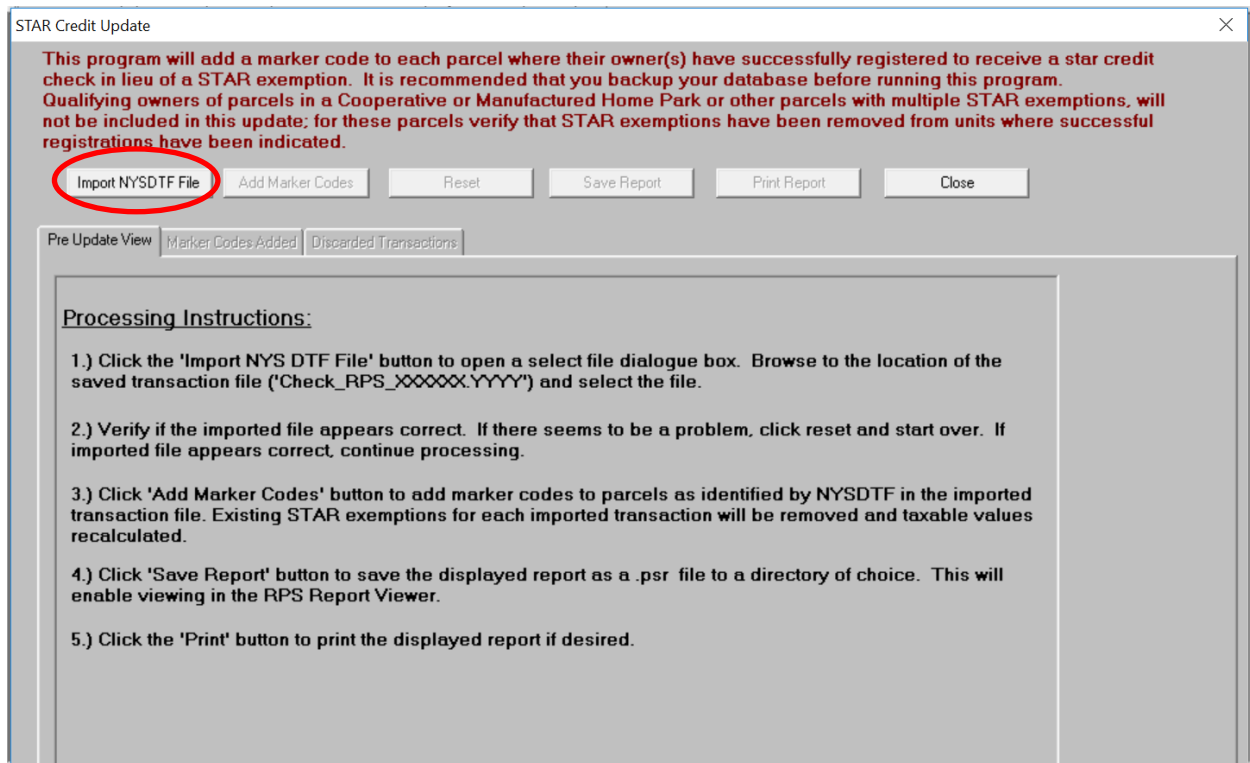
Set By: [redacted]  
Set On: 7/6/2016 07:57:07

Save Cancel Close Print

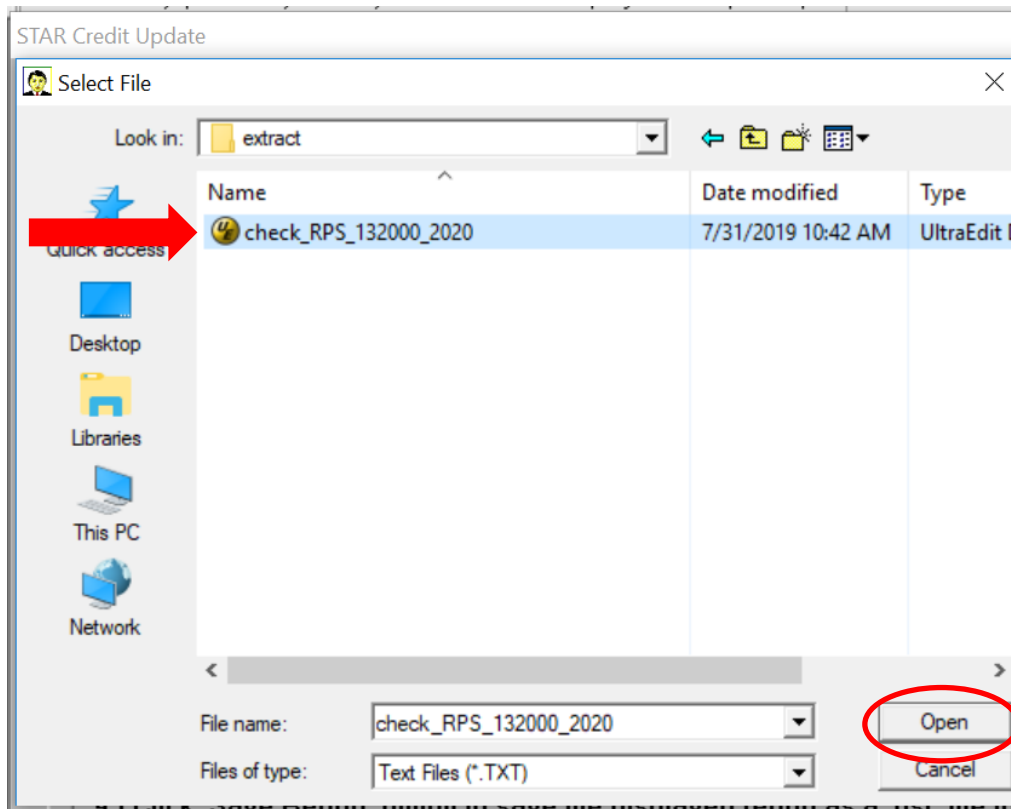
4. On the *STAR Management* screen, select *STAR Credit Update*. Enter the Roll Year used for levy and select *OK*. Select *Yes* to confirm or *No* to cancel your chosen levy year.



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

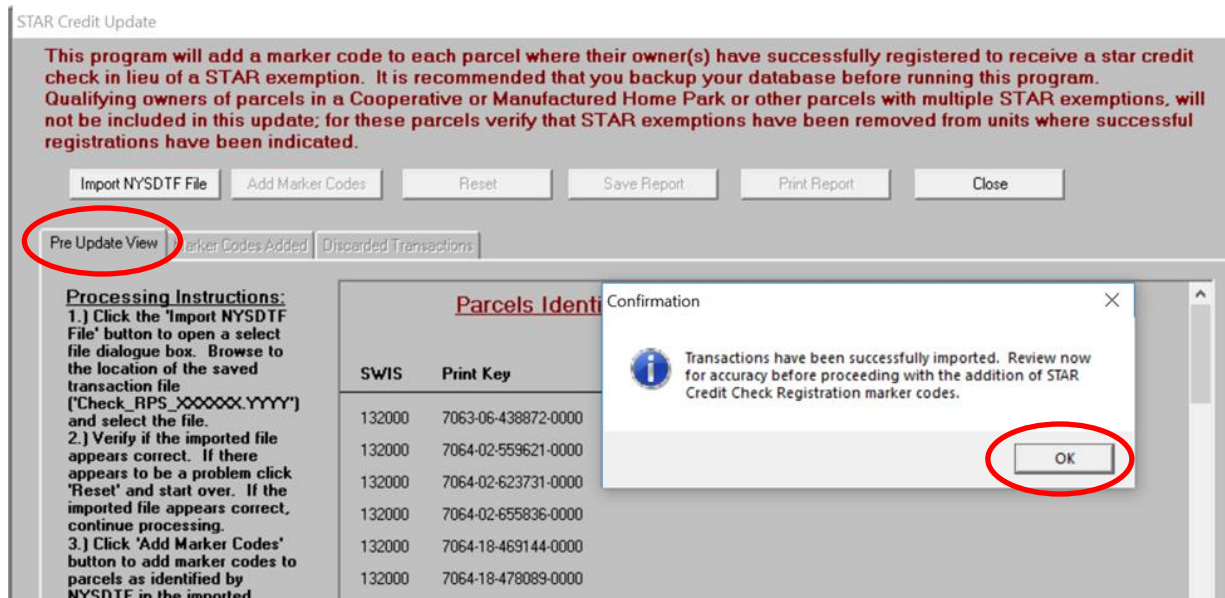


6. Browse to the location where you stored the previously downloaded file, click on the file and select *Open*.



After the file is imported, the contents of the file will appear on the *Pre Update View* screen. If there is more than one page, you must select *OK* to 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 is summarized at the end.

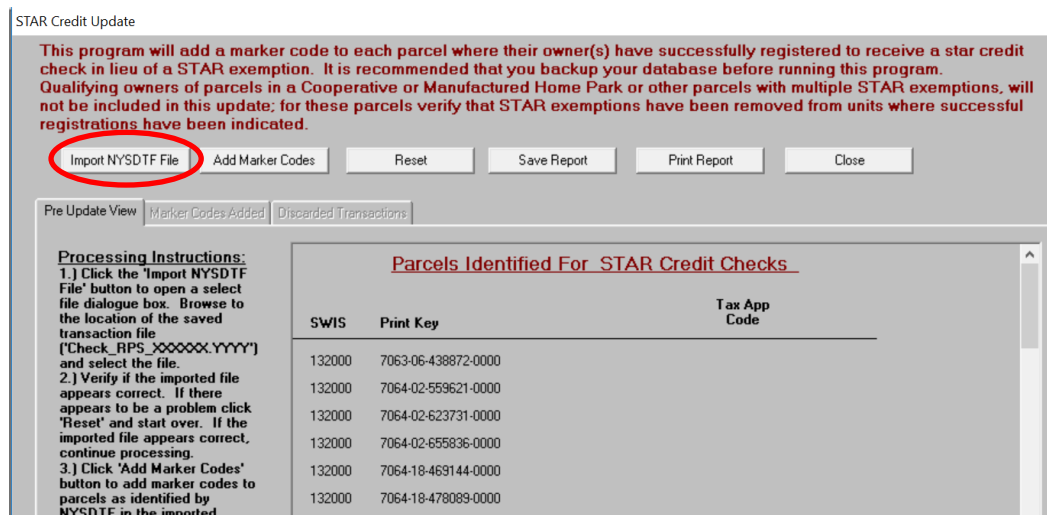
7. If the file appears appropriate\*, select **OK**. You should print and/or save the report as a PSR file because it will no longer be available after you close the utility.



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

8. Select **Add Marker Codes** to update the database.

This update program will add marker codes to parcels listed on the transaction file for the selected Roll Year and will automatically run a recalculation of taxable values for all parcels in the municipality. The update program can take from five to thirty-five minutes depending on the size of the municipality.



9. After processing is complete, a report of the marker codes added will display on the *Marker Codes Added* 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.

STAR Credit Update

This program will add a marker code to each parcel where their owner(s) have successfully registered to receive a star credit check in lieu of a STAR exemption. It is recommended that you backup your database before running this program. Qualifying owners of parcels in a Cooperative or Manufactured Home Park or other parcels with multiple STAR exemptions, will not be included in this update; for these parcels verify that STAR exemptions have been removed from units where successful registrations have been indicated.

Import NYSDTF File Add Marker Codes Reset Save Report Print Report Close

Pre Update View Marker Codes Added 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 ('Check\_RPS\_XXXXXX.YYYY') 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 'Add Marker Codes' button to add marker codes to parcels as identified by NYSDTF in the imported transaction file. Existing STAR exemptions for each imported transaction will be removed and taxable values recalculated.

NYS Real Property System NYSDTF STAR Credit Check 7/16/2020  
County of Dutchess Registration Report  
Town of Amenia  
SWIS Code - 132000

| Print Key           | Roll Year | Marker Code Added | Tax App Code | Ex Amount |
|---------------------|-----------|-------------------|--------------|-----------|
| 7063-06-438872-0000 | 2020      | 99999             |              | 0         |
| 7064-02-559621-0000 | 2020      | 99999             |              | 0         |
| 7064-02-623731-0000 | 2020      | 99999             |              | 0         |
| 7064-02-655836-0000 | 2020      | 99999             |              | 0         |
| 7064-18-469144-0000 | 2020      | 99999             |              | 0         |
| 7064-18-478089-0000 | 2020      | 99999             |              | 0         |
| 7064-18-484181-0000 | 2020      | 99999             |              | 0         |

If a parcel listed on the imported transaction file is a cooperative building (owner code = 'P' or 'Q') or a Mobile Home Park (property class = 416), or has multiple STAR exemptions, no action will be taken and the parcel will be listed on the *Discarded Transactions Report*. These parcels should be reviewed and manually updated at the parcel level if appropriate. You should print and/or save the report as a PSR file because it will no longer be available after you close the utility. All three report tabs are accessible for comparison.

STAR Credit Update

This program will add a marker code to each parcel where their owner(s) have successfully registered to receive a star credit check in lieu of a STAR exemption. It is recommended that you backup your database before running this program. Qualifying owners of parcels in a Cooperative or Manufactured Home Park or other parcels with multiple STAR exemptions, will not be included in this update; for these parcels verify that STAR exemptions have been removed from units where successful registrations have been indicated.

Import NYSDTF File

Add Marker Codes

Reset

Save Report

Print Report

Close

Pie Update View

Marker Codes Added

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 ('Check\_RPS\_XXXXXX.YYYY') 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 'Add Marker Codes' button to add marker codes to parcels as identified by NYSDTF in the imported transaction file. Existing STAR exemptions for each imported transaction will be removed and taxable values recalculated.

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 Credit Check Registration

7/24/2017

County of

City of

SWIS Code -

Discarded Transactions Report

| Print Key | Unit Nbr | Reason   |
|-----------|----------|--|
|           | 2        | Mobile Home and Cooperative transactions, not acted upon mechanically and subject to manual intervention |

Number of discarded transactions: 1

Batch processed on: 7/24/2017 by user:

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

**Example.** The image below is a sample of a parcel where a marker code has been added. Note that the marker code has no value and the *Taxable Values for School and Schl after STAR* are equal.

| Total 1 Exemption |  | County Adjusted Amt | Town/City Adjusted Amt | School Adjusted Amt |
|-------------------|--|---------------------|------------------------|---------------------|
| Exemption Code    |  |                     |                        |                     |
| 99999 STAR Ck B   |  |                     |                        |                     |

|                       |            |                 |  |
|-----------------------|------------|-----------------|--|
| Calc Sr. Exempts...   |            | Misc:           |  |
| Code: 99999 STAR Ck B | Term Yr:   | Res Pct:        |  |
| Amount:               | Init Year: | Eq Rate: 100.00 |  |
| Percent:              | Own Pct:   | Spec Rate: 0    |  |

|                    |  |                  |         |
|--------------------|--|------------------|---------|
| Exemption Amounts: |  | Taxable Values:  |         |
| County:            |  | County:          | 342,000 |
| Muni:              |  | Muni:            | 342,000 |
| School:            |  | School:          | 342,000 |
|                    |  | Schl after STAR: | 342,000 |