



# Enhanced STAR Eligibility Report (Report #1) Instructions

April 1, 2022

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## Overview

The *Enhanced STAR Eligibility Report* (Report #1) provides eligibility determinations for the properties enrolled in the Enhanced STAR Income Verification Program (IVP).

Wherever possible, we will issue the report at least 20 days prior to tentative roll date. Update your roll after the report is issued.

After selecting the SWIS code for your jurisdiction and entering additional search criteria, the report returns the following fields:

SWIS code	Print key	Previous Print key	Mobile home co-op	Property Address	Names	Eligibility status	Status Reason	Date of Report
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For the full report, select *Download Report*.

*Eligibility status* lists the Tax Department's determination:

- Basic
- Enhanced
- Not Eligible – remove exemption

If the Tax Department sent an income worksheet or denial letter to a property owner who has not responded, the eligibility status will be Basic STAR. (The property is eligible for the Basic STAR exemption.)

The *Status Reason* can be one of the following:

- Residency. One or more of the owners do not meet the residency requirement.
- Age. One or more of the owners do not meet the age requirement.
- Income. One or more of the owners do not meet the income requirement.
- Multiple benefit. One or more of the owners are receiving the STAR benefit on another residence.
- Pending. The Tax Department's review may be in process. Confirm the *Eligibility Status* when the *Tentative Roll Corrections Report* (Report #4) is issued in late May.

**Note:** Co-ops that were enrolled in the IVP for the first time this year may not appear on this report. Instead, they will be included on the *Tentative Roll Corrections Report* (Report #4) issued in late May as long as the assessor provides the cooperative spreadsheet on a timely basis. See [Send the manufactured home and co-op spreadsheets to the Tax Department](#) for your municipality's deadline.

## Instructions for RPSV4 Users

To update your roll file to reflect the *Eligibility status* on the report:

- run the *Enhanced STAR IVP Exemption Update Utility* to update the properties currently receiving the Enhanced STAR exemption on your roll file, and
- manually update those properties currently receiving the Basic STAR exemption or no STAR exemption.

The functions of the utility are included in the table on the following page.

**If a property is listed on the report as eligible but you're aware that it's not eligible due to age, ownership, or residency:**

- update the roll based on your determination, and
- follow the instructions on [How to submit STAR report changes](#) so ORPTS can update its records.

**If a property is not listed on the report and you have entered the data or transmitted the form to the Tax Department for data entry,** open the IVP Tool in the [Online Assessment Community](#), and check the status of the property.

- If the Source is *Roll Record*, the property has not been entered in the system. Follow the instructions in the [User Guide](#) to enter it into the IVP Tool.
- If the enrollment is closed, select *Re-activate* under the *Actions* dropdown. If Re-activate does not display, follow the instructions on [How to submit STAR report changes](#) so ORPTS can re-activate the enrollment.

If you believe the property is eligible for the Enhanced STAR exemption, grant the exemption on the tentative assessment roll. The Tentative Assessment Roll Corrections Report will include the Tax Department's determination for the property.

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

- export the RPS Bulk File for Report #1,
- back up your database, and
- install all RPS software release updates. (See [Real Property System](#).)

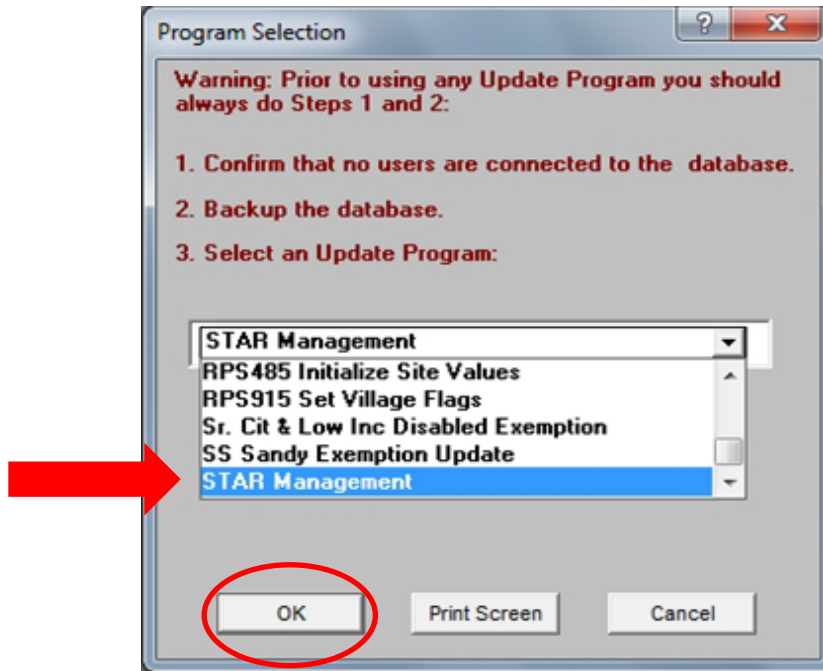
**Note:** Exemptions with an initial year equal to or greater than the current roll year will not be acted on in this update; these parcels need to be reviewed at the parcel level to determine if the exemption should be removed.

**For users of RPSV4 software:**

<b>Exemption status on the assessment roll file</b>	<b>Tax Department determination</b>	<b>Result After Running the RPSV4 utility</b>	<b>Assessor Action</b>
Enhanced STAR exemption	Eligible for the Enhanced STAR exemption	No change	No action required
Enhanced STAR exemption	Eligible for the Basic STAR exemption	Utility applies the Basic STAR exemption to the roll record	No action necessary; the utility will programmatically update the roll.
Enhanced STAR exemption	Not eligible for the Basic or Enhanced STAR exemption	Utility removes the STAR exemption	No action necessary; the utility will programmatically update the roll
Basic STAR exemption	Eligible for the Enhanced STAR exemption	Property is listed on the discarded transactions report; assessment roll is <b>not</b> updated	Manually update the roll to include the Enhanced STAR exemption unless you're aware that the property is not eligible
Basic STAR exemption	Eligible for the Basic STAR exemption	The assessment roll record will continue to include the Basic STAR exemption	No action required
Basic STAR exemption	Not eligible for the Basic or Enhanced STAR exemption	Property is listed on the discarded transactions report; assessment roll is <b>not</b> updated	Manually remove the STAR exemption
No STAR exemption	Eligible for the Enhanced STAR exemption	Property is listed on the discarded transactions report; assessment roll is <b>not</b> updated	Manually update the roll to include the Enhanced STAR exemption unless you're aware that the property is not eligible
No STAR exemption	Eligible for the Basic STAR exemption	Property is listed on the discarded transactions report; assessment roll is <b>not</b> updated	Manually update the roll to include the Basic STAR exemption unless you're aware that the property is not eligible
No STAR exemption	Not eligible for the Basic or Enhanced STAR exemption	No change	No action required

## How to run the RPSV4 Enhanced STAR IVP Exemption Update Utility

1. Select *Administration* on the Navigation Screen to open the Administrative Toolbar.
2. Select *Update Programs*.
3. 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

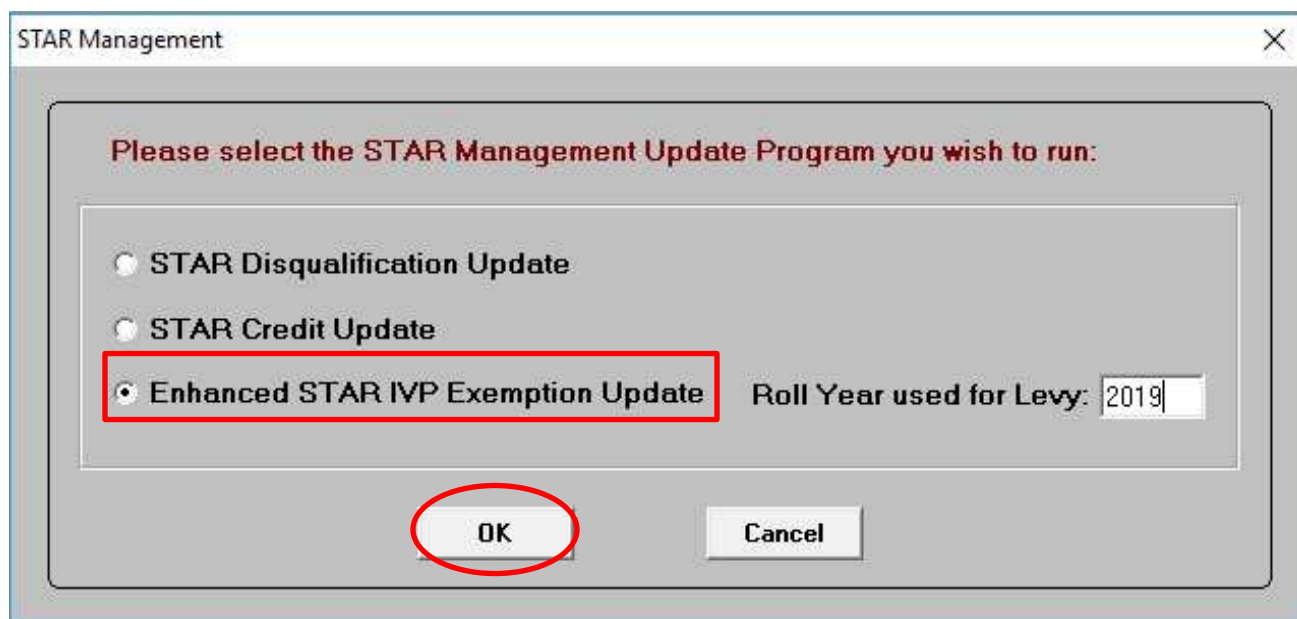
USER: [REDACTED] SWIS: [REDACTED]

	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"/> 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
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 <input type="checkbox"/>	ALL <input type="checkbox"/>	ALL <input type="checkbox"/>
	NONE <input type="checkbox"/>	NONE <input type="checkbox"/>	NONE <input type="checkbox"/>

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

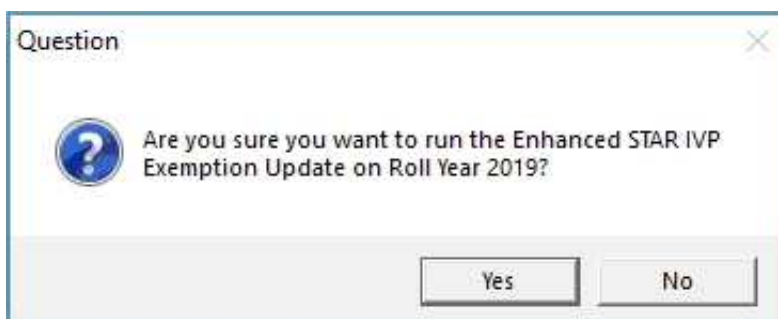
Save Cancel Close Print

4. On the *STAR Management* screen, select *Enhanced STAR IVP Exemption Update*. Enter the roll year used for levy. Select *OK*.



The image shows a 'STAR Management' dialog box with a title bar containing a close button. The main text reads 'Please select the STAR Management Update Program you wish to run:'. Below this, there are three radio button options: 'STAR Disqualification Update', 'STAR Credit Update', and 'Enhanced STAR IVP Exemption Update'. The third option is selected and highlighted with a red rectangular box. To the right of the radio buttons is a text field labeled 'Roll Year used for Levy:' containing the value '2019'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'. The 'OK' button is circled in red.

Select *Yes* to confirm or *No* to cancel.



The image shows a 'Question' dialog box with a title bar containing a close button. It features a question mark icon on the left. The text inside asks, 'Are you sure you want to run the Enhanced STAR IVP Exemption Update on Roll Year 2019?'. At the bottom, there are two buttons: 'Yes' and 'No'.

5. On the *Enhanced STAR IVP Update Selection* screen, select *Import Enhanced STAR IVP File*.

NYSDTF Enhanced STAR IVP Enrollment

### Enhanced STAR IVP Update Selection

This program will update STAR exemptions for parcels listed on the NYSDTF Enhanced STAR IVP Eligibility Report. It will only act on parcels with an existing Enhanced STAR exemption, where the income eligibility determination differs from the parcel's STAR status. Parcels with either a Basic STAR exemption, or no STAR exemption will not be acted on. Instead, income eligibility determinations that differ from the parcel's STAR status will be included on the Discarded Transaction Report, and are subject to review and manual update. Similarly, parcels in a Cooperative or Mobile Home Park, or other parcels with multiple STAR exemptions will be included on the Discarded Transaction Report, and are subject to review and manual update.

Upon completion, exemptions and taxable values within the municipality will automatically be updated. It is recommended that you backup your database before running this program.

**Import Enhanced STAR IVP File** Update Exemption Codes Reset Save Report Print Report Close

Pre Update View Transactions Discarded Transactions, sorted by SBL Discarded Transactions, sorted by Reason

#### Processing Instructions

1. Roll Year 2019 will be updated
2. Select *Import Enhanced STAR IVP File*
3. Browse to the transaction file IVP\_RPS\_XXXXXX\_YYYY and select the file
4. Verify import is correct. Select *Reset* to restart import
5. Select *Update Exemption Codes* to process exemptions for parcels identified by NYSDTF on the imported file
6. Select *Save Report* to save the displayed report as a PSR file
7. Select *Print Report* to print the displayed

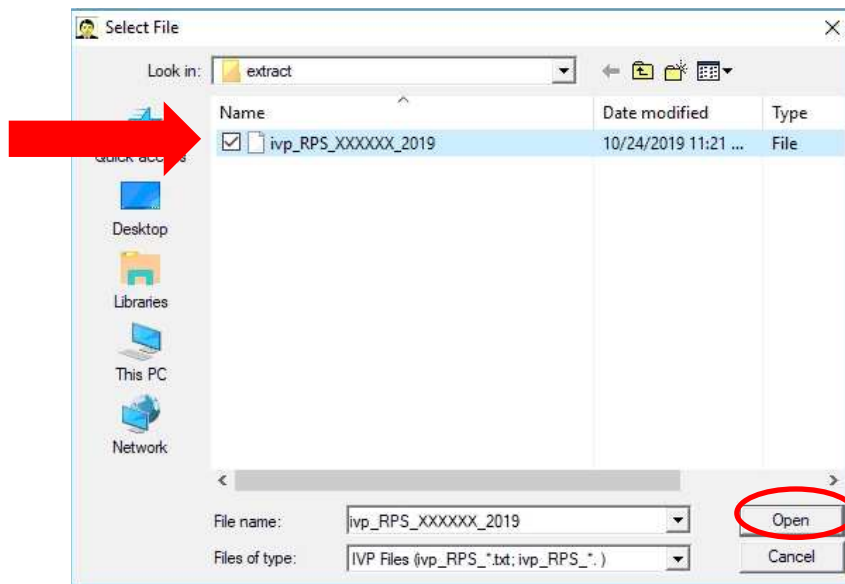
#### NYS Real Property System NYSDTF Enhanced STAR IVP Enrollment: 12/23/2019 Proposed Updates

Swis	Print Key	Unit Nbr	Roll Year	IVP Ex Type
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Number of parcels subject to Enhanced STAR IVP exemption updates: 1

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





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 Enhanced STAR IVP File* and select the correct file. If you continue to have an issue, contact your [ORPTS Customer Service Liaison](#).

8. Select *Update Exemption Codes* to update the database.

This update program 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.

After processing is complete, a report of updated exemptions will display on the *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.

NYSDTF Enhanced STAR IVP Enrollment

Enhanced STAR IVP Update Selection

This program will update STAR exemptions for parcels listed on the NYSDTF Enhanced STAR IVP Eligibility Report. It will only act on parcels with an existing Enhanced STAR exemption, where the income eligibility determination differs from the parcel's STAR status. Parcels with either a Basic STAR exemption, or no STAR exemption will not be acted on. Instead, income eligibility determinations that differ from the parcel's STAR status will be included on the Discarded Transaction Report, and are subject to review and manual update. Similarly, parcels in a Cooperative or Mobile Home Park, or other parcels with multiple STAR exemptions will be included on the Discarded Transaction Report, and are subject to review and manual update.

Upon completion, exemptions and taxable values within the municipality will automatically be updated. It is recommended that you backup your database before running this program.

Import Enhanced STAR IVP File **Update Exemption Codes** Reset Save Report Print Report Close

Processing, complete.

Pre Update View **Transactions** Discarded Transactions, sorted by SBL Discarded Transactions, sorted by Reason

Processed Exemptions Report

Parcels listed on the Transactions Report have been processed.

Basic STAR exemption(s) were added to Parcels identified with an IVP Exemption Type of B.

STAR exemption(s) were removed from Parcels identified with an Exemption Type of N.

Please view the Discarded Transactions Report for additional records.

NYS Real Property System NYSDTF Enhanced STAR IVP Enrollment 1/2/2020  
County of [REDACTED] Transactions Report  
Town of [REDACTED]  
SWIS Code - [REDACTED]

SWIS	Print Key	Unit Nbr	Roll Year	IVP Ex Type	Roll Ex Type	Ex Code Removed	Ex Code Added
[REDACTED]	[REDACTED]		2019	B	E	41834	41854
[REDACTED]	[REDACTED]		2019	B	E	41834	41854
[REDACTED]	[REDACTED]		2019	B	E	41834	41854
[REDACTED]	[REDACTED]		2019	B	E	41834	41854
[REDACTED]	[REDACTED]		2019	B	E	41834	41854
[REDACTED]	[REDACTED]		2019	N	E	41834	
[REDACTED]	[REDACTED]		2019	B	E	41834	41854
[REDACTED]	[REDACTED]		2019	B	E	41834	41854
[REDACTED]	[REDACTED]		2019	N	E	41834	

Number of exemptions updated for roll year: 9  
Batch processed on: 1/2/2020 by user: [REDACTED]

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## Discarded Transactions file

Parcels listed on the imported transaction file that did not have the exemption updated are sorted in two separate ways: **SBL** and **Reason**. To view either list, select the *Discarded Transactions, sorted by SBL* tab or the *Discarded Transactions, sorted by Reason* 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.

The screenshot shows the 'Enhanced STAR IVP Update Selection' window. It contains a text box explaining the program's purpose and a button bar with 'Import Enhanced STAR IVP File', 'Update Exemption Codes', 'Reset', 'Save Report', 'Print Report', and 'Close'. Below this is a tabbed interface with 'Pre Update View', 'Transactions', 'Discarded Transactions, sorted by SBL', and 'Discarded Transactions, sorted by Reason'. The 'Discarded Transactions, sorted by SBL' tab is selected. The report displays a table of discarded transactions with columns: SWIS, Print Key, Unit Nbr, Roll Year, IVP Ex Type, Roll Ex Type, and Reason. The table shows 10 rows of data, all with 'Parcel was not processed. IVP Ex Type is equal to Roll Ex Type' as the reason. A sidebar on the left lists reasons for exclusion: 'Parcel not found in the municipality', 'Parcel has a Roll Ex Type that is Basic (B)', 'Parcel is a Mobile Home or Cooperative', 'Parcel does not have a STAR exemption', 'Parcel has multiple residences', and 'IVP Ex Type is equal to Roll Ex Type'. A footer indicates 'Page 1 of 8'.

Enhanced STAR IVP Update Selection

This program will update STAR exemptions for parcels listed on the NYSDTF Enhanced STAR IVP Eligibility Report. It will only act on parcels with an existing Enhanced STAR exemption, where the income eligibility determination differs from the parcel's STAR status. Parcels with either a Basic STAR exemption, or no STAR exemption will not be acted on. Instead, income eligibility determinations that differ from the parcel's STAR status will be included on the Discarded Transaction Report, and are subject to review and manual update. Similarly, parcels in a Cooperative or Mobile Home Park, or other parcels with multiple STAR exemptions will be included on the Discarded Transaction Report, and are subject to review and manual update.

Upon completion, exemptions and taxable values within the municipality will automatically be updated. It is recommended that you backup your database before running this program.

Import Enhanced STAR IVP File Update Exemption Codes Reset Save Report Print Report Close

Pre Update View Transactions **Discarded Transactions, sorted by SBL** Discarded Transactions, sorted by Reason

Processing, complete.

**Discarded Transactions Report**

Parcels listed on the Discarded Transactions Report were excluded from STAR processing.

Parcels may be excluded for the following reasons:

- Parcel not found in the municipality
- Parcel has a Roll Ex Type that is Basic (B)
- Parcel is a Mobile Home or Cooperative
- Parcel does not have a STAR exemption
- Parcel has multiple residences
- IVP Ex Type is equal to Roll Ex Type

\* Parcels on this report are subject to review and manual updates.

**NYS Real Property System**

County of [REDACTED]  
Town of [REDACTED]  
SWIS Code - [REDACTED]

**NYSDTF Enhanced STAR IVP Enrollment**

**Discarded Transactions Report**

**Sorted by SBL**

SWIS	Print Key	Unit Nbr	Roll Year	IVP Ex Type	Roll Ex Type	Reason
[REDACTED]	[REDACTED]	2019	B	E	E	Parcel was not processed. Mobile Home or
[REDACTED]	[REDACTED]	2019	E	E	E	Parcel was not processed. IVP Ex Type is e
[REDACTED]	[REDACTED]	2019	E	E	E	Parcel was not processed. IVP Ex Type is e
[REDACTED]	[REDACTED]	2019	E	E	E	Parcel was not processed. IVP Ex Type is e
[REDACTED]	[REDACTED]	2019	E	E	E	Parcel was not processed. IVP Ex Type is e
[REDACTED]	[REDACTED]	2019	E	E	E	Parcel was not processed. IVP Ex Type is e
[REDACTED]	[REDACTED]	2019	E	E	E	Parcel was not processed. IVP Ex Type is e
[REDACTED]	[REDACTED]	2019	E	E	E	Parcel was not processed. IVP Ex Type is e
[REDACTED]	[REDACTED]	2019	E	E	E	Parcel was not processed. IVP Ex Type is e
[REDACTED]	[REDACTED]	2019	E	E	E	Parcel was not processed. IVP Ex Type is e

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

- If a parcel listed on the imported transaction file is a cooperative building (owner code = 'P' or 'Q'), a mobile home park (property class = 416), or manufactured housing (property class = 270 or 271), no action will be taken and the parcel will be listed on the *Discarded Transactions Report*. The following message will display in the Reason column:

*Parcel was not processed. Mobile Home or Cooperative transaction.*

- If a parcel listed on the imported transaction file already matches the exemption type on the roll, no action will be taken and the parcel will be listed on the *Discarded Transactions Report*. The following message will display in the Reason column:

*Parcel was not processed. IVP Ex Type is equal to Roll Ex Type.*

- If a parcel listed on the imported transaction file has either a Basic STAR exemption, no STAR exemption, or a STAR credit marker (88888 or 99999), no action will be taken and the parcel will be listed on the *Discarded Transactions Report*. The following message will display in the Reason column:
  - *Parcel was not processed. Parcel has a Roll Ex Type that is Basic (B), or*
  - *Parcel was not processed. Roll Ex Type is blank.*
- If a parcel listed on the imported transaction file has multiple residences (property class = 280 or 281), no action will be taken and the parcel will be listed on the *Discarded Transactions Report*. The following message will display in the Reason column:

*Parcel was not processed. Parcel has multiple residences.*
- If a parcel listed on the imported transaction file is not found, no action will be taken and the parcel will be listed on the *Discarded Transactions Report*. The following message will display in the Reason column:

*Parcel not found in municipality.*

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

## Instructions for users of other software

Update your roll file based on the *Eligibility status* in the report. Follow the instructions in the table on following page.

**If a property is listed on the report as eligible but you're aware that it's not eligible due to age, ownership, or residency:**

- update the roll based on your determination, **and**
- follow the instructions on [How to submit STAR report changes](#) so ORPTS can update its records.

**If a property is not listed on the report and you have entered the data or transmitted the form to the Tax Department for data entry,** open the IVP Tool in the [Online Assessment Community](#), and check the status of the property.

- If the Source is *Roll Record*, the property has not been entered in the system. Follow the instructions in the [User Guide](#) to enter it into the IVP Tool.
- If the enrollment is closed, select *Re-activate* under the *Actions* dropdown. If Re-activate does not display, follow the instructions on [How to submit STAR report changes](#) so ORPTS can re-activate the enrollment.

**For users of software other than RPSV4:**

<b>Exemption status on the assessment roll file</b>	<b>Tax Department determination</b>	<b>Assessor Action</b>
Enhanced STAR exemption	Eligible for the Enhanced STAR exemption	No action required
Enhanced STAR exemption	Eligible for the Basic STAR exemption	Manually update the roll record to Basic STAR
Enhanced STAR exemption	Not eligible for the Basic or Enhanced STAR exemption	Manually remove the STAR exemption
Basic STAR exemption	Eligible for the Enhanced STAR exemption	Manually update the roll to include the Enhanced STAR exemption unless you're aware that the property is not eligible
Basic STAR exemption	Eligible for the Basic STAR exemption	No action required
Basic STAR exemption	Not eligible for the Basic or Enhanced STAR exemption	Manually remove the STAR exemption
No STAR exemption	Eligible for the Enhanced STAR exemption	Manually update the roll to include the Enhanced STAR exemption unless you're aware that the property is not eligible
No STAR exemption	Eligible for the Basic STAR exemption	Manually update the roll to include the Basic STAR exemption unless you're aware that the property is not eligible
No STAR exemption	Not eligible for the Basic or Enhanced STAR exemption	No action required