

STAR Credit Eligible Report (Report #8) Instructions

March 31, 2025

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

- Mobile home co-op
- Property class on last roll

• Property Key

- Property Address
- Date of Report

Print key

Names

For the full report, select either *Download Report (Text)* or *Download Report (Excel)*. For more details, see <u>How to Access and Download STAR Reports</u>.

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.

Warning: Prior to using any Update Program always do Steps 1 and 2:	you should
1. Confirm that no users are connected to th	e database.
2. Backup the database.	
3. Select an Update Program:	
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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							
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Change Next Year	File to Current Yea	rFile 💆	M	×			
Home Improveme	nt Exemption	V	V	v			
LEED Exemption U	Jpdate	✓	×	~			
Next Year Process	sing	✓	¥	~			
Recolculate Exem	pts/Taxables	✓	×	v			
Remove Roll Yea	rs	\checkmark	V	v			
Residential Invest	ment Exemption	v	v	v			
RPS190 Calculate	Uniform %		S	v			
BPS340 Calculate	S458A/B Vet Exem	note 🔽	V	v			
BPS342/343 Chan	ce in Level Ex	V	V	v			
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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.

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Qualifying owners of percels in a Cooperative or Manufactured Horse Dark or other perce	efore running this program.
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saved transaction file ("Check_RPS_XXXXXXXYYY") and select the file.	
2) Marié i i state important filo approve accorde légitore accorde to bala problem aliaban	ant and start sums. If
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3.) Click 'Add Marker Codes' button to add marker codes to parcels as identified by N	IYSDTF in the imported
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6. Browse to the location where you stored the previously downloaded file, click on the file and select Open.

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	File name:	check_RPS_132000_	2020	•	Open
	Files of type:	Text Files (*.TXT)		•	Cancel

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.

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("Check_RPS_XXXXXX.YYYY and select the file.	('') 132000	7063-06-438872-0000	Credit Check Registration marker codes.	
2.) Verify if the imported file appears correct. If there	132000	7064-02-559621-0000	OK	
appears to be a problem clic 'Reset' and start over. If the	k 132000	7064-02-623731-0000		ノ
imported file appears correct	132000	7064-02-655836-0000		
3.) Click 'Add Marker Codes'	132000	7064-18-469144-0000		
parcels as identified by NYSDTF in the imported	132000	7064-18-478089-0000		

*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 <u>ORPTS Customer</u> <u>Service Liaison</u>.

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.

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							
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	swis	Parcels Ident	ified For STAR Credit Checks Tax App Code	<u> </u>			
('Check, RPS_XXXXXYYY') 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,	132000 132000 132000 132000	7063-06-438872-0000 7064-02-559621-0000 7064-02-623731-0000 7064-02-655836-0000					
continue processing. 3.) Click 'Add Marker Codes' button to add marker codes to parcels as identified by NYSDTF in the imported	132000 132000	7064-18-469144-0000 7064-18-478089-0000					

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 mark check in lieu of a STAR exen Qualifying owners of parcels not be included in this update registrations have been indic	ker code to each parcel nption. It is recommend in a Cooperative or Ma e; for these parcels veri cated.	I where their ow led that you ba inufactured Hou ify that STAR e	vner(s) have succ ckup your databa me Park or other xemptions have	cessfully regis ase before ru parcels with r been remove	stered to receive nning this progra nultiple STAR ex d from units wher	a sta m. æmpt e suc
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'Reset' and start over. If the	7063-06-438872-0000	2020	99999		0	
continue processing.	7064-02-559621-0000	2020	99999		0	
3.) Click 'Add Marker Codes' button to add marker codes to	7064-02-623731-0000	2020	99999		0	
parcels as identified by NYSDTE in the imported	7064-02-655836-0000	2020	99999		0	
transaction file. Existing STAR	7064-18-469144-0000	2020	99999		0	
exemptions for each imported transaction will be removed	7064-18-478089-0000	2020	99999		0	
and taxable values	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.

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appears correct. If there	Print Key Unit Nbr Reason	
'Reset' and start over. If the	Z Mobile Home and Cooperative transactions, not acted upon mechanically and subject to manual interv	entor
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 .per 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.	Rolander for discenting to the sector of the	
	Page 1 of 1	Þ

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 Exemption Code	County Adjusted Amt	Town/City Adjusted Amt	School Adjusted Amt
99999 STAR Ck B			
Code: 99999 STAR Amount: Percent	Ck B	Term Yr. Init Year: Own Pct:	Misc: Res Pct: Eq Rate: 100.00 Spec Rate: 0
Exemption Amounts: County: Muni: School:		County: Muni: School: Schl after STAR:	342,000 342,000 342,000 342,000