

# Income Greater Than \$250,000 Report (Report #2) Instructions

March 31, 2025

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## **Overview**

The Income Greater than \$250,000 Report (Report #2) lists STAR recipients with incomes greater than \$250,000. By law, these property owners are no longer eligible for the STAR exemption.

Wherever possible, we will issue the report at least 20 days prior to tentative roll date. Review the report and remove the Basic and Enhanced STAR exemptions from the properties listed in the report.

After selecting your SWIS code, you can choose to view:

- Only current removals, or .
- All parcels since the last report was issued.

SWIS code:	010100 Albany
Print key:	
Mobile home or co-op:	Select one
Include:	Select one
Last name:	
Sort:	Ascending 🕑 On: Print Key

After making your desired selections and entering additional search criteria, the report returns the following fields:

SWIS code

Mobile home co-op

Property Key Print key

.

Property Address

Property class on last roll

Date of Report

Names

Levy Year

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

RPSV4 users can run a utility to remove the Basic and Enhanced STAR exemption from impacted properties. See instructions below.

Users of other software must manually remove the Basic and Enhanced STAR exemptions from the properties listed in the report.

# Instructions for RPSV4 Users

To remove the Basic and Enhanced STAR exemptions from the properties listed in this report, run the STAR Disqualification Update Utility.

Before running the utility, you must:

- export the RPS Bulk File for Report #2,
- back up your database, and
- install all RPS software release updates. (See Real Property System.)

Upon completion, exemptions and taxable values within the municipality will automatically be updated.

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

Additionally, 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 at the parcel level.

## How to run the STAR Disqualification Update Utility

1. After selecting your SWIS code and search criteria and the results are displayed at the bottom of the page, select *Export RPS Bulk File*.



Do you want to open or save RPS_STARBasicDenial_012000_04072020.	.txt from utmv6.tax.ny.gov? X
	Open Save  Cancel
always do Steps 1 and 2:	Save as
1. Confirm that no users are co	onnected to the datat Save and open

3. Designate where you want to store the file. (In the following steps, you'll need to remember where you stored it). Do not change the *Save as type*. Select *Save*.

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	Assessment C	ommunity Weekly Newslet	:	STAR Summary IVP Edit Report	4/6/2020 11:38 AM	Text Document		24 KB	
	Claudia								
	STAR Reports								
	User Guides								
ri	📥 OneDrive								
-	💻 This PC								
-	🧊 3D Objects								
	📃 Desktop		~						
	File name:	RPS_STARBasicDenial_0120	00_04	4072020					~
	Save as type:	Text Document							$\sim$
51	∧ Hide Folders					Save	Ca	ancel	]

- 4. In RPSV4, select Administration on the Navigation Screen to open the Administrative Toolbar.
- 5. Select Update Programs.

6. 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 UPD		HTS	
USER: SWIS:			
	PYR	CYR	NYR
Batch File Maintenance		<ul> <li>Image: A start of the start of</li></ul>	V
Business Investment Exemption		✓	M
Change Next Year File to Current Year File			M
Home Improvement Exemption	▼	▼	N N
LEED Exemption Opdate	▼	▼	N N
Next Year Processing	- -	<u>ب</u> ا	
Recalculate Exempls/Taxables			- -
Pasidential Investment Exemption		T.	R I
DDS100 Calculate Liniteres %	<u>,</u>	- -	N N
RPS190 Calculate Uniform %	- -	<b>v</b>	
RPS340 Calculate S456Ayb Vet Exempts	- -	v.	<b>1</b>
RPS344 Agricultural Exemption		v V	<b>V</b>
RPS349 STAB Exemption Undate	V	<b>v</b>	v.
BPS380 Undate Utility	<b>v</b>		
BPS460 Field Reviewed Value Generator	<b>V</b>	<b>v</b>	<b>v</b>
RPS485 Initialize Site Values	<b>V</b>	<b>v</b>	v
RPS915 Set Village Flags	V	<b>v</b>	<b>V</b>
Sr. Cit. and Low Inc. Dis. Exempt	<b>V</b>	$\checkmark$	<b>V</b>
STAR Management	<ul> <li>Image: A start of the start of</li></ul>	<b>v</b>	<b>V</b>
Redevelopment of Inhibited Property Exen	nption 🖌	V	V
Super Storm Sandy Exemption	<b>V</b>		<b>V</b>
RPS215 Final Assessors Report			V
RPS035 Sales Transmittal with Extract	<b>V</b>		<b>V</b>
General File Maintenance		$\checkmark$	<b>V</b>
	Add Del	Add Del	Add Del
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GIS Maintenance	~		<b>v</b>
indge Opdate		,	
·	NONE	NONE	NONE
Set By:			
Set On: 7/6/2016 07:57:07			
Save Can	cel Close	e Print	

7. On the STAR Management screen, select STAR Disqualification Update. Select OK.

STAR	Management	×
	Please select the STAR Management Update Program you wish to run:	
	<ul> <li>STAR Disqualification Update</li> <li>STAR Credit Update</li> </ul>	
	© Enhanced STAR IVP Exemption Update	
	OK Cancel	J

8. On the STAR Exemption Disqualifcation Update screen, select Import NYSDTF File.

TAR Exemption Disqualification Update	X
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 i this update and must be reviewed and manually removed. Additionally, exemptions with an initiation year equal to or greater than the <u>current</u> roll year will not be acted upon in this update and should be reviewed.	in
Import NYSDTF File River Exemptions Reset Seve Report Print Report Close	
Pre Update View Removed Exemptions Disoarded 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.	

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

🤵 Select File					×
Look in:	ktract		•	← 🗈 💣 📰▼	
3	Name	^		Date modified	Туре
	☑ 📄 basic_RPS	SRemoval_XXXXXX_2019.txt	1	4/15/2019 11:19 AM	Text Docu
Desktop					
Libraries					
_					
This PC					
Network					
	<				>
	File name:	basic_RPSRemoval_XXXX	KX_2019	).txt 🔍 🤇	Open
	Files of type:	Text Files (*.TXT)		-	Cancel

10. 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.

This program will remove STA lirected by NYSDTF and taxa refore running this program. If his update and must be revier han the current roll year will n Import NYSDTF File Remove Ex Pre Update View Removed Exemptions	AR Exemptions from CL ble values will be rece Exemptions for those p wed and manually rem ot be acted upon in this emptions Reset	URRENT ROLL YEAR Ilculated accordingly. arcels in a Cooperativ oved. Additionally, ex s update and should b Save Report	parcels (and NEXT YEAF It is recommended that y re or Manufactured Home cemptions with an initiatio reviewed. Print Report	STAR Exemption Disqualifica R parcels if they exist) a: you backup your databa Park will not be include on year equal to or great Close	ation Update 2
Processing Instructions:	Parcels Id	entified With Disq	alified STAR Exempt	tions_	<b>^</b>
1.) Click the 'Import NYSDTF File' button to open a select file dialogue box. Browse to the location of the saved	SWIS Print Key	Exemption Code	Unit Tax App Nbr Code		
transaction file and select the file.	Confirmation			×	E
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.	i Trans	actions have been successfr racy before proceeding with	Illy imported. Review now for the removal of exemptions.		
3.) Click 'Remove Exemptions' button to delete all valid			ОК		
exemptions identified in transaction file. In addition,		41854			
taxable values will be recalculated for each parcel		41854	н		
where an exemption has been deleted.		41854	н		
4.) Click 'Save Report' button		41854	н		
to save the displayed report as a .psr_file to a directory of		41854	н		
choice. This will enable viewing in the RPS Report		41854	н		
Viewer.		41854	н		
<ol> <li>Click the 'Print' button to print the displayed report if desired.</li> </ol>				Page 1 of 3	

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

#### 11. 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 (and may take longer if the Next Year roll exists).

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

This program will remove ST directed by NYSDTF and tax sefore running this program. his update and must be revi han the current roll year will	AR Exemptions table values will Exemptions for ewed and manual not be acted upo	from CURREN be recalculate those parcels i ally removed. A on in this updat	FROLL YEAR parc d accordingly. It is n a Cooperative or Additionally, exemp e and should be re	els (and NEXT recommended Manufactured H tions with an in viewed.	YEAR parcels i that you backu Home Park will i itiation year equ	f they exist) as p your database not be included in ual to or greater	
Import NYSDTF File Remove E		Reset	Save Report	P <u>r</u> int Report	Cļose		
Pre Update View Removed Exemption	s Discarded Transacti	ons					
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.	NYS Real Pro County of Town of SWIS Code -	perty System	NYSDTF STAR Removed Exemp	Disqualified otions Report	1/30/2020		^
2.) Verify if the imported file	Print Key	Roll Year	Exemption Code Removed	Tax App Code			
appears to be a problem click		2019	41854				
'Reset' and start over. If the imported file appears correct,		2019	41854				
continue processing.		2019	41854				
3.) Click 'Remove Exemptions'		2019	41854				
exemptions identified in		2019	41854				
transaction file. In addition, taxable values will be		2019	41854				
recalculated for each parcel where an exemption has been		2019	41854				
deleted.		2019	41854				
4.) Click 'Save Report' button		2019	41854				
a .psr file to a directory of		2019	41854				
choice. This will enable viewing in the RPS Report Viewer.		2019	41854				
5.) Click the 'Print' button to		2019	41854				
print the displayed report if	Number of exemp	otions removed fro	m roll year 2019:14				

### **Discarded Transactions file**

Parcels listed on the imported transaction file that did not have the exemption removed will appear in the *Discarded 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.



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

 If a parcel does not have a Basic or Enhanced STAR exemption, the following message will display in the Reason column:

Exemptions transactions found to have been already removed

If a parcel listed on the imported transaction file is either a cooperative building (owner code = 'P' or 'Q') or a mobile home park (property class = 416), no action will be taken. The following message will display in the Reason column:

Mobile Home and Cooperative transactions, not acted upon mechanically and subject to manual intervention.

• Parcels where the basic exemption exists in the current year; however, the exemption initiation year is greater than or equal to the roll\_yr. This message will display in the Reason column:

Exemption transactions where EX\_INIT\_YR equal or greater than Current Year

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