



Enhanced STAR Eligibility Report (Report #1) Instructions

March 20, 2024

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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
- Property Key
- Print key
- Previous Print key
- Mobile home co-op
- Property Address
- Names
- Eligibility status
- Status Reason
- 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](#).

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](#).)

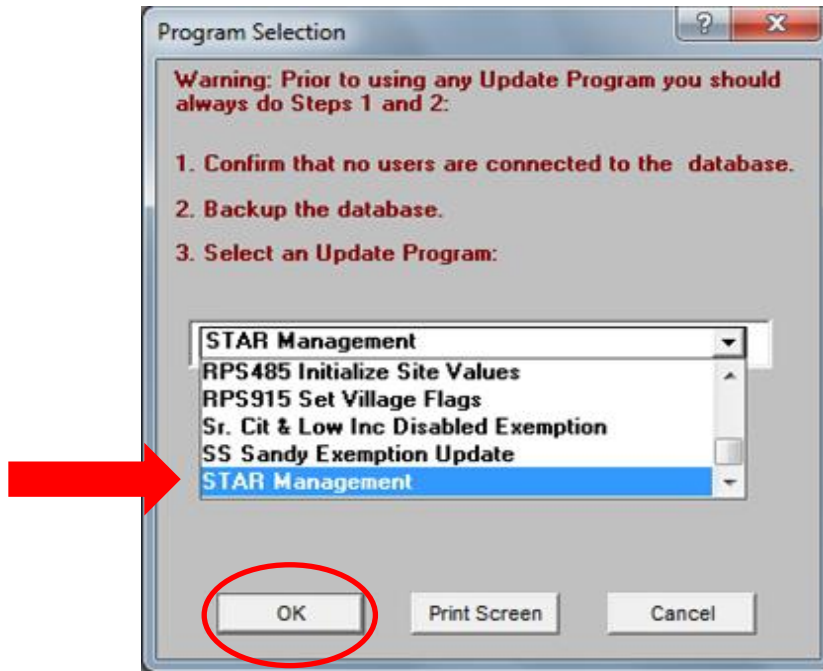
Note: Exemptions with an initial year equal to or greater than the current roll year will not be acted on in this update; these parcels need to be reviewed at the parcel level to determine if the exemption should be removed.

For users of RPSV4 software:

Exemption status on the assessment roll file	Tax Department determination	Result After Running the RPSV4 utility	Assessor Action
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 not 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 not 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 not 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 not 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

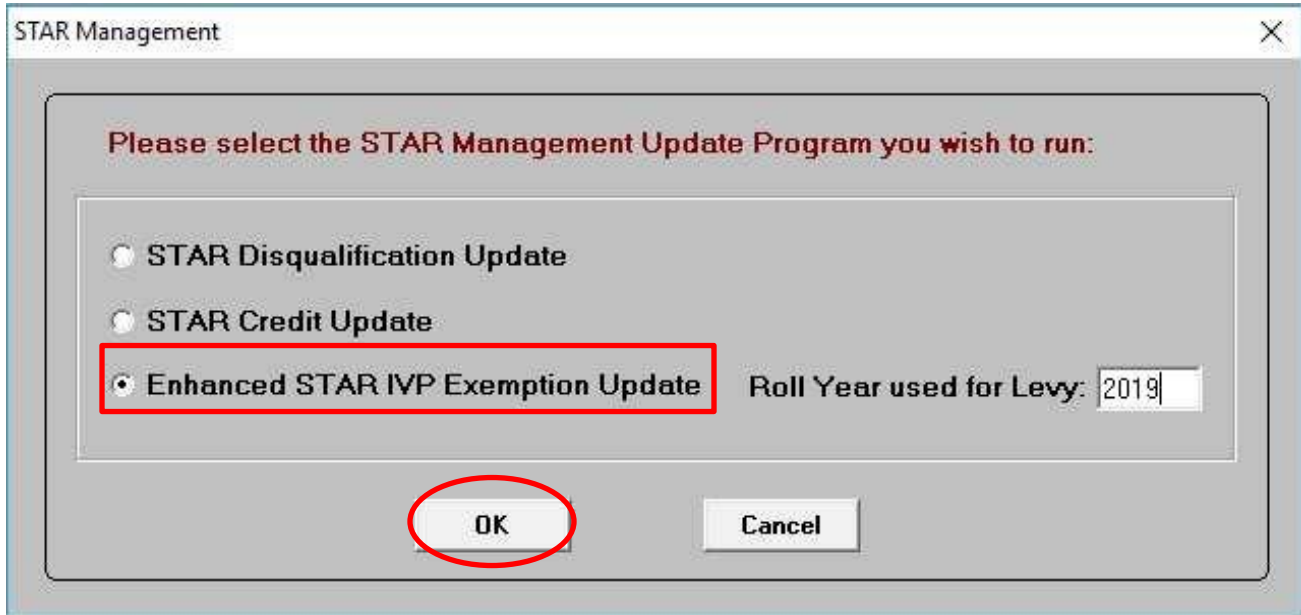
USER: [REDACTED] SWIS: [REDACTED]

	PYR		CYR		NYR	
Batch File Maintenance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<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"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	Add	Del	Add	Del	Add	Del
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Valuation Maintenance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<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"/>	<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"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<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

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*.



STAR Management

Please select the STAR Management Update Program you wish to run:

- STAR Disqualification Update
- STAR Credit Update
- Enhanced STAR IVP Exemption Update

Roll Year used for Levy: 2019

OK Cancel

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



Question

Are you sure you want to run the Enhanced STAR IVP Exemption Update on Roll Year 2019?

Yes 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

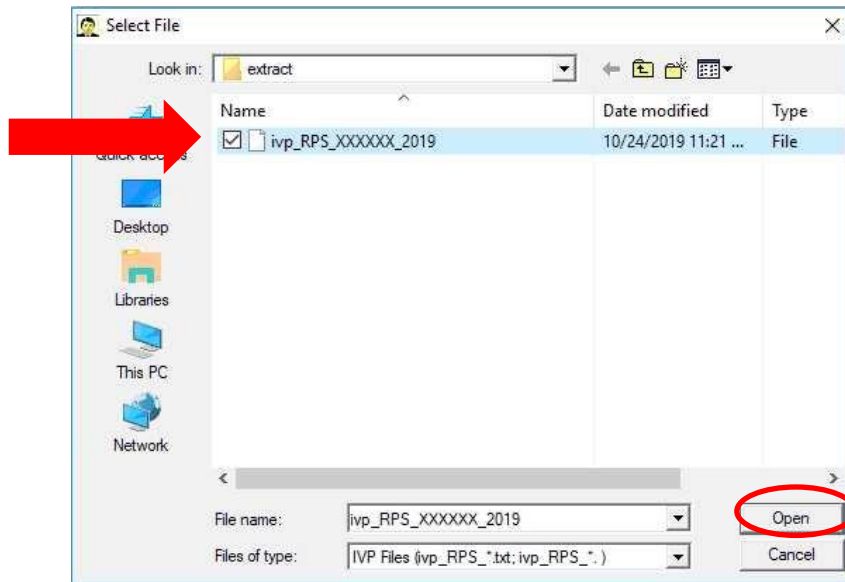
NYS Real Property System NYSDTF Enhanced STAR IVP Enrollment: 12/23/2019
Proposed Updates

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*.



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.

The screenshot displays the 'NYS DTF Enhanced STAR IVP Enrollment' application. The main window is titled 'Enhanced STAR IVP Update Selection' and contains a large text box with instructions in red. Below the text are buttons for 'Import Enhanced STAR IVP File', 'Update Exemption Codes', 'Reset', 'Save Report', 'Print Report', and 'Close'. A red circle highlights the 'Pre Update View' button in the top navigation bar. Below this, there is a 'Processing Instructions' panel on the left with a list of 7 steps. The main display area shows 'NYS Real Property System' and 'NYS DTF Enhanced STAR IVP Enrollment: Proposed Updates' as of 12/26/2019. A 'Confirmation' dialog box is open in the center, stating 'Transactions have been successfully imported. Review now for accuracy before proceeding with updates.' with an 'OK' button circled in red. In the background, a table with columns 'Swis', 'Print Key', and 'IVP Ex Type' is visible, showing a list of 2019 transactions.

*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.

Processing, complete.

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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- 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:

Exemption status on the assessment roll file	Tax Department determination	Assessor Action
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