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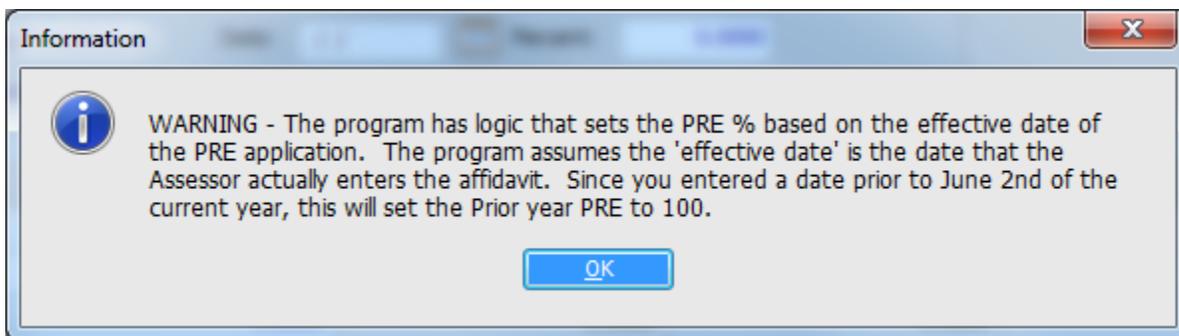
Date: March 26, 2014
To: Assessing Users, both .NET and Pervasive
From: BS&A Software
Re: Rolling Over Your Database

Now is the time to start thinking about rolling over your database from 2014 to 2015. In years past, we typically recommended waiting until the May 1st PRE deadline. However, since the deadline for PREs is now June 1st, a lot of users can't wait until June to roll the database over. For consistency, we highly recommend consulting your County Equalization Department so you are both on the same page.

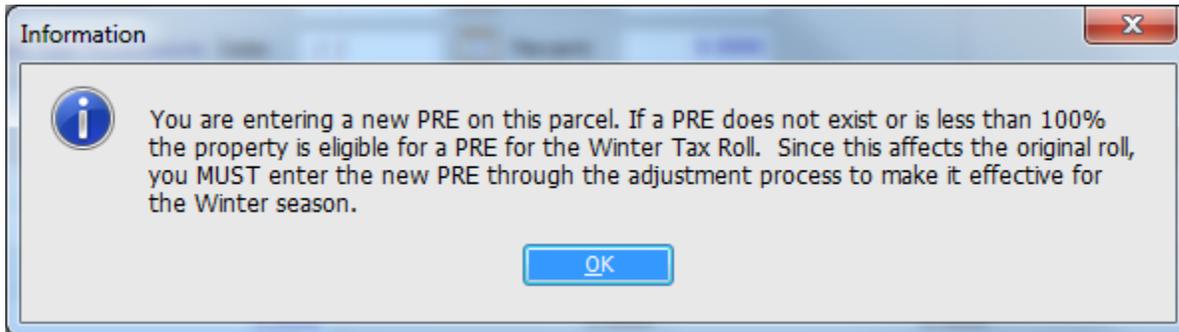
One of the key reasons for consistency is to maintain balance between the reports the County submits to the State (the L-4046), and the reports the local units send (such as the 4626). If you both are submitting values, including a breakdown of the PRE & Non PRE values, your submissions will balance.

For those users that prefer to wait until June 1st to roll over, you will continue to enter your PREs into the 2014 database; the program will continue to change the Original 2014 PRE for those parcels entered up to June 1st. At that point, you will run the appropriate year end reports, including the L-4626, and then export the data to the County.

For those users that roll over any time prior to June 1st, a decision has to be made on how the entry of PREs is going to be handled. For example: If the PREs are entered in the rolled over database (2015) with a date up to June 1st, the program will notify you with the prompt pictured below and will AUTOMATICALLY set the 2014 Original PRE to 100%, as well as the Current 2015 PRE:



Once a PRE is entered with a date after June 1st, the program will notify you with the prompt pictured below. The program will then AUTOMATICALLY take you into the ADJUSTMENT screen and allow you to either select the Adjustment Type as WINTER PRE, or any of the other adjustment types.



VERY IMPORTANT!!!! If the PRE entered with a date after June 1st was actually eligible for the Summer Roll, you must select an Adjustment Type of something other than the WINTER PRE type (Other/Assessor/JBOR) for the PRE to flow over to Tax and adjust the Summer bill. However, if the PRE entered was not eligible for the Summer bill, you MUST select the Adjustment Type of WINTER PRE, so when exported to Tax it only affects the Winter bill.

If you, or the county, make the decision to have any PRE received AFTER you roll over entered as an Adjustment and not affect the 2014 Original PRE, you will have to hold onto any PREs received after the rollover and NOT enter those until after the June 1st date.

To recap: For balancing purposes, it is very important to check with your Equalization Director to be on the same page. You'll need to make the decision of not only when to roll over, but also how the PREs are going to be entered. We believe the most common options are:

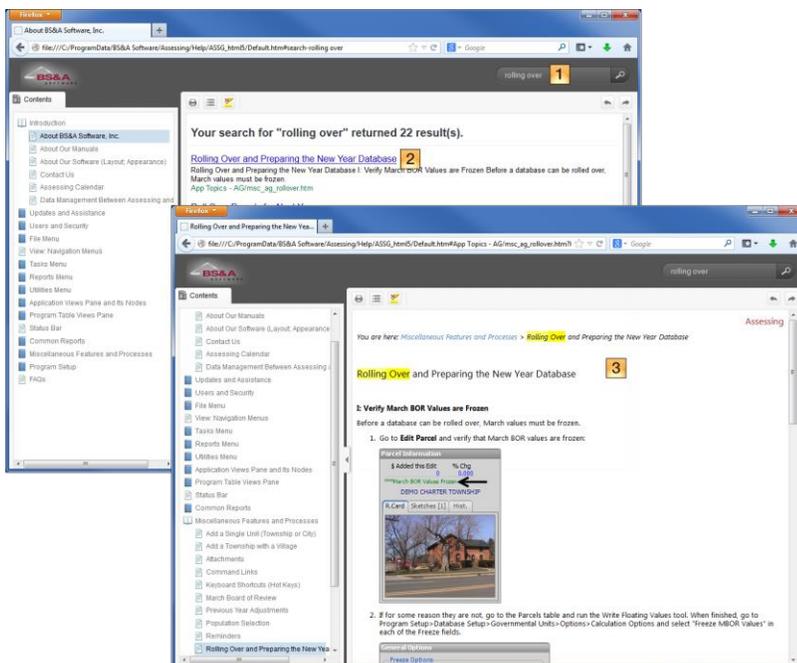
- 1.) You can wait until after the June 1st PRE deadline to roll over the database and continue to enter any PRE changes in the 2014 database, then roll the database over after June 1st.
- 2.) You can pick a date (say, May 1^{st +/-}) and enter all of your PRE changes up to that date. Then, stop entering any PRE changes, run the appropriate reports (including the L-4626 to the State), and then run your export to the County. This will ensure your L-4626 report to the STC matches the County's L-4046 report; then roll over the database and continue entering any PREs in the rolled over 2015 database.
- 3.) You can roll the database over at any point prior to the June 1st deadline and enter any PRE changes; the program will change the 2014 Original PRE for those PREs that are entered up to June 1st.
- 4.) You can roll the database over at any point prior to the June 1st deadline and hold onto any PREs received prior to that deadline, then enter them as adjustments starting June 2nd.

Once rolled over...

- ~ Municipalities that are linked to Tax need to make sure that Tax is linking with the new 2015 (rolled over) database. This is especially important if you are set up to allow Tax to pull information directly from your Assessing database.
- ~ Municipalities that run exports to send Tax value information need to make sure they are exporting from the new 2015 database. Tax has the option during import to pull prior year (2014) values because Assessing is rolled over.
- ~ Municipalities that display data online via BS&A AMG/Internet Services need to make sure that they are displaying the 2015 database, to ensure database updates are displayed on the web.

.NET Users

Go to *Help>View Documentation>Download Latest Manual* (if you already have the latest installed, you will be notified). Return to *Help>View Documentation* and select *Manual*. Enter *Rolling Over* in the Search field (1), then click the first result (2). Each item in the checklist is a hyperlink to the instructional topic (3).



Pervasive Users

If you have Adobe Acrobat installed, go to *Help>Other Documentation* and select *Roll Over Reference*. This document is intended to guide you through the process. Other helpful guides are also located in the Other Documentation sub menu, and your manual provides instructions as well.

In closing, we would like to thank you for your business, and remind you to contact us at any time with questions or concerns. .NET users may do this directly through their Help menu (*Contact Customer Support*, then *Request Support Phone Call* or *Email Support*).

BS&A Assessing Support