

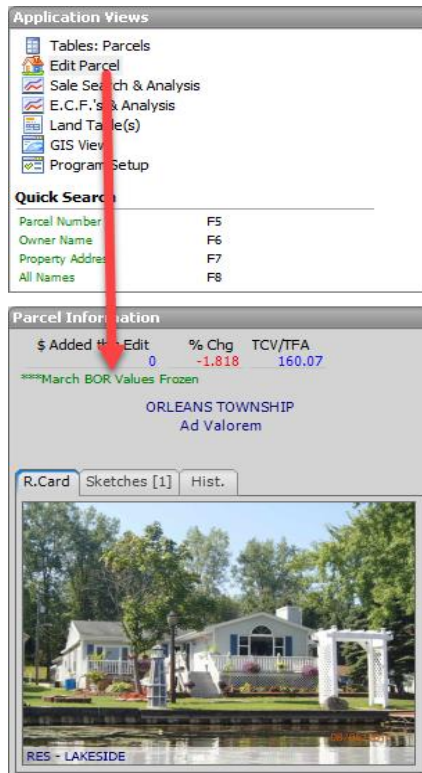
Rolling Over and Preparing the New Year Database

Questions? From within BS&A, go to **Help>Contact Customer Support** and select **Request Support Phone Call** or **Email Support**. Or, you may call us at (855) 272-7638 and ask for the appropriate support team. Questions for our I.T. team may be submitted by phone (same number), or by emailing itsupport@bsasoftware.com.

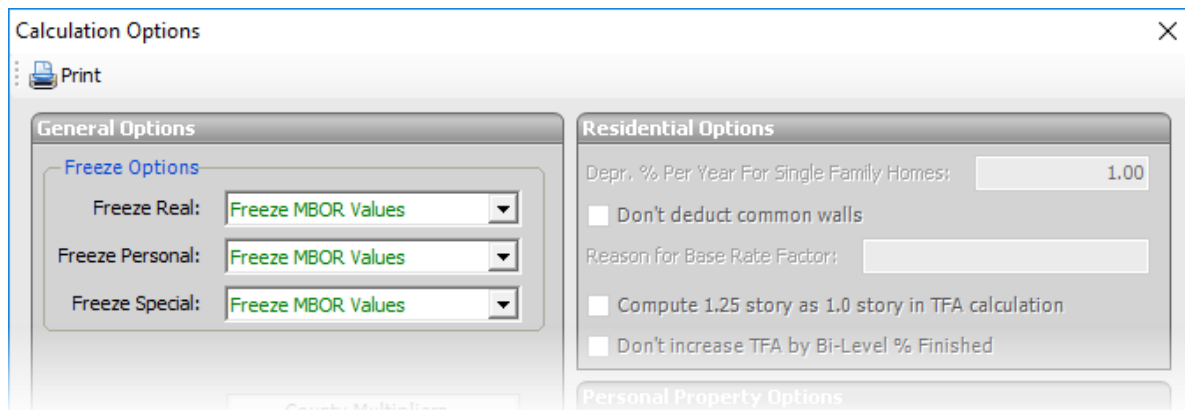
I. Verify March BOR Values are Frozen

Before a database can be rolled over, March values must be frozen.

1. Go to Edit Parcel and verify that March BOR values are frozen:



2. If for some reason they are not, go to the Parcels table and run the Write Floating Values tool. When finished, go to Program Setup>Database Setup>Governmental Units>Options Tab>Calculation Options and select Freeze MBOR Values in each of the Freeze fields.



II. Run the Misc. Totals/Statistics Report

This report gives you the numbers from your original Warrant (from your Tax database). Keep the report in a safe place, as you will be using it later in the Roll Over process (Step VII).

III. Back Up Your Database

It is good practice to keep a backup of the final MBOR Values prior to processing the roll over information. A backup name is automatically supplied in the Save Backup As field, however, you should change the name to something indicative of **previous year balanced totals**. This make it easier to identify should a restore be necessary.

IV. Copy the "Previous Year" Database to a New "Current Year" Database

The database being created in this step will from here on out be referred to as your "Current Year" database, and your old one will be referred to as "Previous Year."

V. Archive the Previous Year Database

Archiving your Previous Year database can prevent it from being opened by users other than those with administrator-level access. Go to Program Setup>Program Settings>Administration and click Archive/Unarchive Database. It is recommended you select Restricted as the option.

VI. Open the Current Year Database

If you are on a network and/or your Assessing database is in a Shared Database Group, consider having your I.T. person do this.

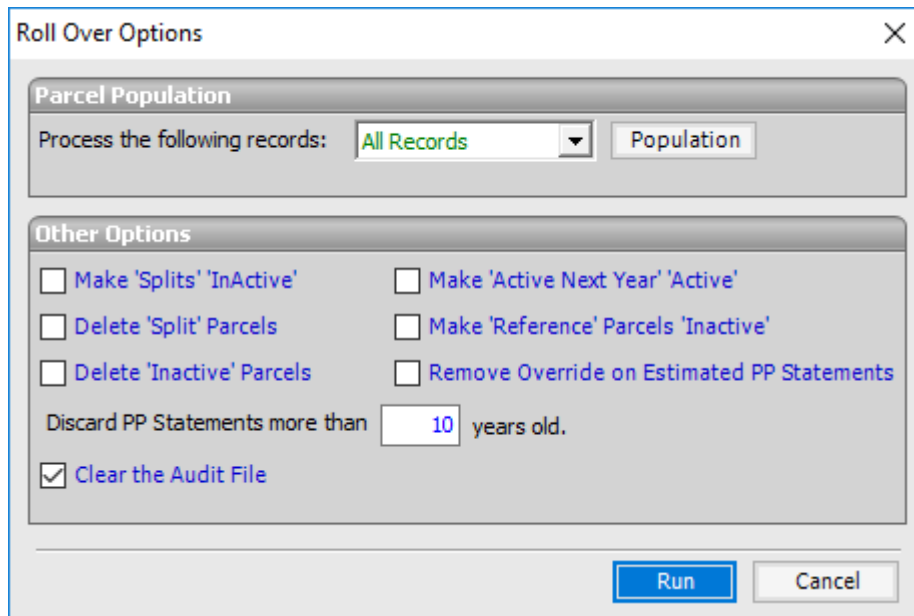
VII. Run the Misc. Totals Statistics Report a Second Time

This second run of the report lets you verify that the numbers in your new Current Year database balance with the numbers in your Previous Year database. You will be using the Misc. Totals/Statistics report generated during Step II of the Roll Over process.

VIII. Run the Roll Over Utility

After the Roll Over, the Current Assessment Year in Program Setup>Program Settings>Global Calculation Options is automatically updated to the new year, and the Freeze Options in Program Setup>Database Setup>Governmental Options>Options Tab>Calculation Options are automatically set to Compute All Values Normally.

1. Open the Parcels table.
2. Click the Tools button and select Roll Over Parcels for Next Year.
3. All Records is the default - and recommended - Population.
4. Set your options. Pictured are the recommended settings:



Make Splits Inactive	Turning this setting on locates all parcels with a record status of Split and changes the status to Inactive, unless the Keep Splits Active setting in Global Calculation Options is turned on.
Delete Split Parcels	Any parcel with a record status of Split/Combined will be deleted.
Delete Inactive Parcels	Any parcel with a record status of Inactive will be deleted.
Make Active Next Year Parcels Active	Any parcel with a record status of Active Next Year will be set to Active.
Make Reference Parcels Inactive	Any parcel with a class of REF - excluding the Ref./Personal class - will be set to Inactive.
Remove Override on Estimated PP Statements	This will remove the override value on Personal Property parcels that were estimated for that year.

Discard PP Statements More Than __ Years Old	If this is overlooked during the utility, personal property statements may be deleted later.
Clear the Audit File	It is recommended that you turn this setting on to free up disk space. Old audit data may be viewed by opening the Previous Year database.
<i>Post Roll Over Tool</i>	<i>If any of these are overlooked during the roll over utility, a tool is available post-roll over that lets you accomplish the same thing without having to go through the roll over process again.</i>

5. Click Run>Ok.
6. You are prompted that improvements are not aged during this process and that they should be done at this time through the Tools button. Click Ok (instructions follow).
7. You are prompted to Write Floating Values as soon as possible and given the chance to do so now. If you are currently linked with Tax, and/or using BS&A Online, we recommend you answer Yes to this prompt. All Records is the default Population. Click Run to proceed.

IX. Enter New County Multipliers

Enter the County Multipliers issued by the State Tax Commission for use with the STC Cost Manual.

X. Age/Renew Real Improvements

This depreciates/appreciates your calculated building values. Buildings classified as Single Family are depreciated according to the percentage entered in Program Setup>Database Setup>Governmental Units>Options Tab>Calculation Options. Aging/Renewing may be done on all parcels or on a selected population. All value changes resulting from this utility are reflected as Equalization Adjustments in Current Year Detail. Any building values in override will have the TCV recalculated, but there will be no change to the Assessed or Taxable values.

1. Open the Parcels Table
2. Click the Tools button and select Age/Renew Real Improvements.
3. Select the Population.
4. Select whether to Age or to Renew (Age is the typical selection).
5. If aging, verify or enter the Minimum % Good for each of the buildings and for everything else.
6. Click Run.

XI. Run the Misc. Totals/Statistics Report a Third Time

For this third printing of the report, be sure to select the option to Show Balance to Tax.

XII. Export Previous Year Values to Tax

This exports not only the Previous Year values, but also the Current Year values. Tax can control which values to import on its end. If you are running this export after rolling over, as recommended, Tax knows to import the Previous Year values.