Split/Combine Reference (Pervasive)

*****PLEASE NOTE*****

This help doc outlines the recommended method, which is to keep the parent parcel active while transferring value to the child parcels.

Other methods are possible; however, great care must be taken or your database will be thrown out of balance. Please call Tech Support if your unit or your county handles splits/combines using either of these methods: Parent remains active with value; Parent is deleted or made inactive.

CREATE A "REFERENCE REAL" CLASS

By assigning the parent a "reference real" class after the split, the system will automatically zero out the current value and take a loss on the parent parcel.

1. Click **Program Management** on the Tree.

2. Click the **Property Classes** button.

3. Click the **Add** button.

4. Enter a unique **Code**.

5. When you return to the Property Class Setup window, enter the **Description** and select **Ref. Real/BLL** as the **Class Type**.

> *Note: The description can be anything you want, but be sure to select **Ref. Real/BLL**, as it is this, and NOT the description given the property class, that is used by the program to determine class.*
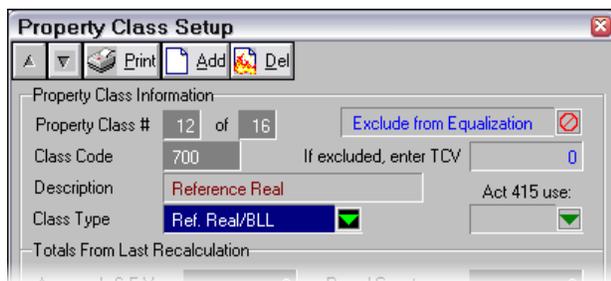
6. Press [Esc] to close this window and return to Program Management.

SPLIT/COMBINE TOOL

The Split/Combine Tool automatically performs the calculation necessary to allocate values.

> 🔘 **Make sure you have a good, recent backup of your database; there is no "undo" function available.**

1. Click **Edit Parcels** on the Tree.

2. Locate the parcel being split.

3. Click the **Land Division** button and verify that the **Number of Splits Left** field has a value other than 0. If 0, you will be unable to use the Split/Combine tool.

4. Press [Esc] to return to the Parcel Edit screen.

5. Click the **Tools** button.

6. Click the **Split/Combine** button.

7. Press [Enter] to clear the prompt verifying the number of splits left.

8. Set the first four options as you want.

9. Open the **Status of Parent After Value Transfer** field and select **Active**. If that is not how your unit or county handles splits, please call Tech Support.

10. Open the **Class of Parent After Value Transfer** field and select the **Reference Real** class you set up.

11. Open the **Status of Child After Value Transfer** field and select **Active**.

12. Open the **Prev. Class of Child** field and select **Split/Combine**.
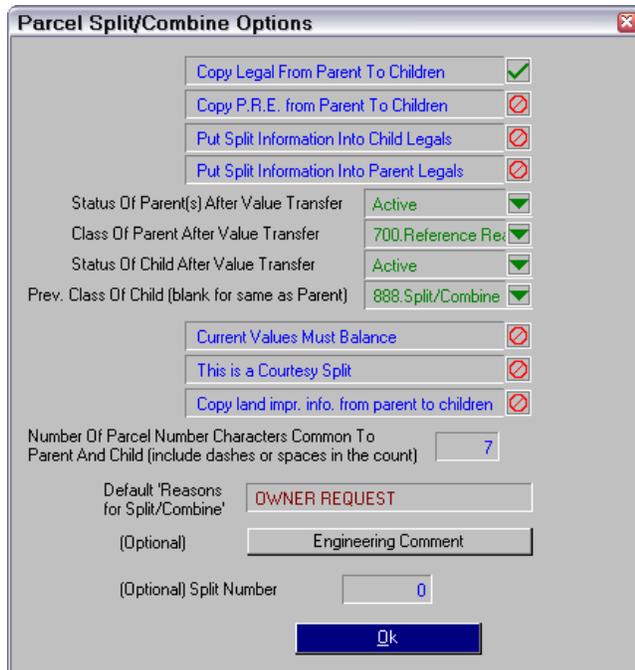
13. **Current Values Must Balance** is rarely used; please call Tech Support if your county/unit requires this.

14. Turn on the **This is a Courtesy Split** field to have the parent and child parcels included in the Courtesy Split Export to the Equalizer Tax program.

15. Select whether or not to copy land improvement information to the child parcels.

16. Enter the number of characters common to parent and child (include dashes and spaces in your character count).

17. The **Default Reason for Split/Combine** field defaults to Owner Request and can be changed.

18. If you would like to keep track of which split the parcel is currently going through, enter it in the **Split Number** field.

19. Click the **Ok** button.

20. The **Function to Perform** field defaults to **Create Children and Transfer Values** and is the recommended method. If that is not how your unit or county handles splits, please call Tech Support.

21. The **Reason for Split/Combine** field displays the text entered in the Split/Combine Options window and can be changed.

22. The **Initiate** and **Complete Dates** default to the system date and can be changed (a split is considered "complete" when values have transferred).

23. Click the **Child Parcels** button.

24. Enter the child parcel numbers.

25. Enter the results of your calculations for each of the child parcels' **Previous Assessed Value** (the Current Assessed Value is rarely used; please call Tech Support). The sum must match the parent's previous year assessed or the split/combine tool will not run.

26. Press [Esc] to return to the Parcel Split/Combine Tool window.

27. Click the **Execute Split/Combine** button.

28. Press [Enter] to clear the prompt informing you the split/combine was executed.

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LAND DIVISION INFO WINDOW

While on the Parcel Edit window of either the parent or a child, click the **Land Division Info** button.

Click the **Comments** button to view a text editor detailing the split/combine.

The **Date of Last Split/Combine** and **Date Created** fields update themselves each time a split/combine is performed on the current parcel.

The **Date Form Filed** field is filled out by the user.

The **Acreage of Parent** field on the child's Land Division Info window displays the parent's acreage; the parent's Acreage field is blank.

The **Split Number** field displays the split number (if entered) during the Split/Combine Tool. This is an optional entry and is informational only.

The **Parcels in Land Tract** field is informational and lets the user keep track of that situation.

The **Land Division Code** field is informational and lets the user identify split/combines.

The **Number of Splits Left** field updates itself each time a split/combine is performed.

The **Unallocated Div's of Parent** and **Unallocated Div's Transferred** fields let the user track how many unallocated divisions there are on the parent parcel and how many were transferred when the split took place.

The **Rights were Transferred** field is enabled by the program on the parent and child parcels and can be changed.

The **Courtesy Split** field reflects the setting during the Split/Combine Tool and can be changed.

The **Parent Owner** field is not automatically set by the program; if the user wishes to track this, the name must be manually entered.

The **Parent Parcel** fields on the child's Land Division Info window display the parent parcel(s); the corresponding fields on the parent's Land Division Info window are blank.

COURTESY SPLITS

Print the Courtesy Split Cross Reference Report

1. Open the **Reports** menu and select **Assessing Reports**.

2. Open the **Report** field and select **Courtesy Split Cross Reference**.

3. Set the **Destination** to **Print to Printer**.

4. Select the population (typically, All Records).

5. Click the **Choose Report Options** button.

6. Select the **Special Population**.

7. Select the options you want to apply to the report (only parcels with the Courtesy Split flag flipped on will appear).

8. Click the **Close** button to return to the Report Setup window.

9. Click the **Ok** button. The Report Options window may appear again, depending on your "Always Prompt Report Options" setting (Program Management⇨User Preferences); if so, verify your settings and click **Close** to proceed.

10. Verify the information is correct before exporting to Tax.

Export the Courtesy Splits

⬤ **Make absolutely sure you are in the correct database.**

⬤ **Before running this export, it is highly recommended you print the "Courtesy Split Cross Reference" report to make sure the parent/child totals balance. You will be prompted about this during the export. The Cross Reference Report is located in the Reports Menu⇨Assessing Reports category.**

1. <u>After verifying you are in the correct database</u>, open the **File** menu and select **Export Data**. From the submenu that appears, select **Courtesy Split Export**.

2. When prompted about the Courtesy Split Cross Reference report, answer appropriately.

3. Select the **population**. If Block, the block must be set before beginning the export. If Query or Choose Units, the area to set this up is located beneath the "Real/Pers" field. Only parcels flagged with the record status of Active Next Year will be included, regardless of population.

4. **Put Export Files in which folder** – if you leave this field blank, the export will place the uncompressed text files in the program directory of the workstation from which the export is being run (typically C:\EQUALW). If you would like the export files placed in a separate area, enter the path or click the Browse button. This example leaves the field blank.

5. **Back up Export Files on Floppy Disks** – <u>ignore this button unless you are running a custom export</u> and are directed by Tech Support to use it. Ordinary exports prompt at the end to compress and back up files.

6. **Copy Compression Utilities to Disk** – if you are creating this export for a vendor that does not use Equalizer software, that vendor will be unable to import the data without BS&A's compression/uncompression utilities. Click this button to copy those utilities to disk to give to the vendor, along with instructions to install that disk prior to attempting the import.

7. Clicking the **Set all fields to Default Values** button sets the File Name fields to the default names used by the program (pictured).

8. Click the **Begin Export** button when ready.

9. When finished, you are prompted that the operation is complete; press your [Enter] key to clear that prompt.

10. You are prompted to back up the files you just made.


11. The uncompressed export files were either placed in your program directory or in another location specified by you (see step 4). Answer Yes to compress those text files into one zip file (typical method). Answer No to provide just the uncompressed text files.

LOCATING CHILD PARCELS...

...while on the Parcel Edit Window

1. While on the parent parcel, click the **Tools** button and then **Goto Child Parcel**.
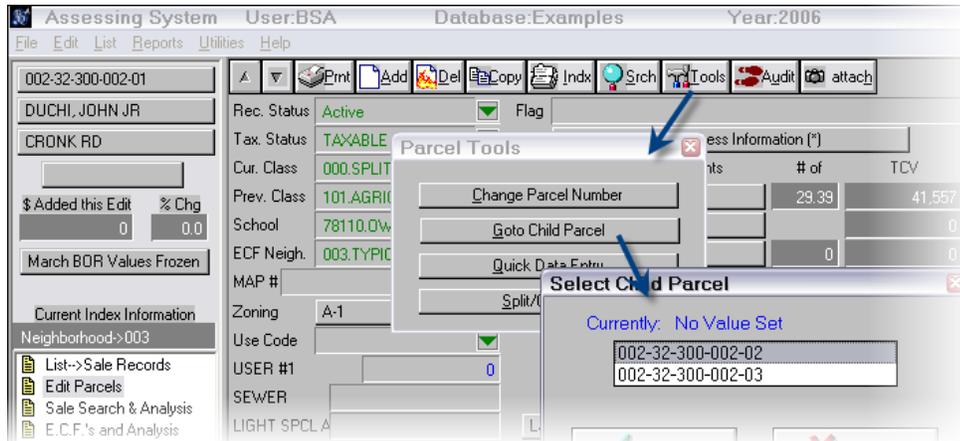
2. Select the parcel.

3. You are prompted to press [Ctrl]+[P] to return to the parent. Press your [Enter] key to clear this prompt.

4. When you are finished viewing/editing the child parcel, press [Ctrl]+[P] to return to the parent.

...while on the Parcel List

1. Click the **Tools** button and then **Find Child Parcels**.

2. Select the population (if block, the block must have been set prior to running this tool).

3. Click **Ok** to proceed.

4. You are prompted:

5. Click **Ok** to proceed.

6. When the Report Setup window appears, select your destination and click the **Ok** button.