

PTF STANDARD DATA FILE SPECIFICATION

General File Information:

1. If there are any questions please email proptaxbills.datafiles@tax.ny.gov with subject line “PTF Standard Data File Inquiry” and the name of your taxing jurisdiction.
2. Please provide a fixed width text file using the **same format, field order and field length** as on the File Specification Sheet. Total record length is 4182 bytes.

Please be aware that providing a file that does not meet the format specifications in this document will require additional reformatting upon file receipt. As a result, taxpayers may experience a delay in Property Tax Relief or STAR credit processing.

3. Text fields should be left justified. For all text fields that are **not used**, please **fill with spaces**. Numeric fields should be right justified. For numeric fields, an implied decimal should be used where indicated. **Do not include a decimal point**. Also, for numeric fields that are **not used**, please **fill with zeroes**.
4. All fields should be upper case. All fields are required unless otherwise stated.
5. File composition – a properly composed file contains the following records in sequence:
 - a) Record T – Transmitter Record – one per file
 - b) Record D – Detail Record – one for each parcel record on file
 - Property Information
 - Exemption Information – File layout can accommodate up to 10 repeating occurrences.
 - Tax Line Information – File layout can accommodate up to 24 repeating occurrences. At least one is required.
 - Property Summary Information
 - c) Record F – Final Record – one per file
6. The file should be named using the following format and should have a .txt extension:
For School Tax files - Constant PTF, ORPTS School Code(6), Levy Year(4), Roll Type(2)*, Sequence Number(2)
For Non-School Tax Files - Constant PTF, SWIS(6), Levy Year(4), Roll Type(2)*, Sequence Number(2)
Example: PTF12345620140201.txt * See below for explanation of Roll Type.

Transmitter Record:

7. **Transmitter's Name** – Organization transmitting the file; left justify and fill with spaces. If vendor, include vendor name and locality.
8. **SWIS County, SWIS Town, SWIS Village** - If multiple localities, use the primary code for the transmitter record. Fill with spaces if code doesn't apply. At least one must be entered if not a school.
9. **ORPTS School Code** - If multiple school districts, use the primary code for the transmitter record. Fill with spaces if not a school.
10. **Tax Roll Type** – Enter one of the following based on the primary data included in the file. This includes any other tax lines processed that were contained in the tax billing cycle. Example: If school only or school & library or other special district, use “01”.
 - 01 - School only
 - 02 - City-Town/County
 - 03 - City-Town only
 - 04 - Village only
 - 05 - County only
 - 06 - Mobile Home/Co-op
 - 07 - City/School (Syracuse, Buffalo, Rochester, Yonkers only)
 - 08 - County/City-Town/School
 - 09 - Other
11. **Levy Year** – Enter the year when the taxes are levied. “2017” or “2018” - Example: If you are sending a file for 2017-18 school tax year, the levy year is 2017. If you are sending a 2018 town tax file, the levy year is 2018.
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Property Tax Information:

12. **SWIS, SBL ID, Section, Sub Section, Block, Lot, Sub Lot, and Suffix** are key fields. All these fields are required. The purpose of these fields is to match your data with assessment roll data. SBL ID is the code used by the local to identify the parcel.
13. **ORPTS School Code** – Must be a valid ORPTS School Code. Please complete for both school and non-school files.
14. **Owner 1 Name** – This is the first name that will appear on the check. The name should be complete including a first and last name and not be longer than 40 characters. An individual name should not be divided between multiple owner fields.

15. **Owner 2 Name** – Please use this field if there is a second owner name that should also appear on the check. Use the same format as Owner 1 Name above. This field should be filled with spaces if it does not apply.

Important Name Formatting Rules:

- The name should **not** end in a special character. (Example: Smith, John &)
- The name should **not** include the words wife or husband, or any variation thereof. (Example: Wf, Wife, & Wife, H/W, WFE, housewife, &1, & one, +1, husband).
- The name should **not** include ETAL or ETUX or any variation thereof. (Example: ETAL, ET AL, ET-AL, ETUX, ET UX, ET-UX, UX, ORS, Others)
- The name should **not** include trustee names, but can be a valid Trust name. Trustee names should be in the Additional Name field.
- The name should **not** contain the name of a deceased person.

16. **Additional Name** – This field is for attn., c/o, or trustee name information (example: Attn: Jane Smith) **Do not use this field for additional owner names.** This field should be filled with spaces if it does not apply.

17. **Mail Address-1, Mail Address-2** - This is the address where the check will be mailed. Please provide **complete** information. No special characters, other than hyphen, period, pound sign and slashes, are allowed. If the Mail Address-2 does not apply please fill with spaces.

18. **Zip** – This can be 5 or 9 characters. Do not include a hyphen if providing 9 characters.

Important Foreign Address Formatting Rules:

- Make sure to put the name of country in the **Country** Field.
- For Canadian addresses:
 - Municipality or Territory should be in the **City** field
 - Province should be in the **State** field
 - Postal Code should be in the **Zip** Code field
 - Example:
 - City – Montreal
 - State – QC
 - Zip – H3S 2V8
 - Country - Canada

Exemption Information:

19. Exemption data groups can accommodate 10 repeating occurrences.

20. **Exemption Code** – Must be a valid ORPTS exemption code. A list of valid codes can be found using the following website.

<http://www.tax.ny.gov/research/property/assess/manuals/vol4/pt1/index.htm>

For exemption codes, the reference table in the link above includes a 5 digit code. The 5th digit describes the applicability of the exemption and should be one of the codes on the following list.

- 0 - County, City or Town and School District
- 1 - County and City or Town
- 2 - County
- 3 - City or Town
- 4 - School District
- 5 - County and School District
- 6 - City or Town and School District
- 7 - Village

21. **Exemption Purpose** – Applicability of each exemption on the parcel. Use the 5th digit of the Exemption Code above.

22. **Exemption Value** – Assessed value of each exemption on the parcel.

23. **Exemption Full Value** – Exemption Value\State Equalization Rate. (Example: If Exemption Value is 20,000 and the state equalization rate is 65.00 then the Exemption Full Value is $20,000 \times 0.65 = 30,769$. If the municipality is assessing at 100% then the Exemption Value and Exemption Full Value would be the same.)

Exemption Code	Exemption Name	Exemption Value	Exemption Purpose	Equalization Rate Expressed as a Decimal	Exemption Full Value
41854	STaR	670	4	0.0119	56,302
41854	STaR	20,000	4	0.6500	30,769
41854	STaR	30,000	4	1.0000	30,000

Tax Line Information:

24. Tax line data groups can accommodate 24 repeating occurrences. **Do not include Roll Section 8 (wholly exempt) parcels.**
25. **Tax Jurisdiction Name** – Name of tax being imposed as it appears on the tax bill. One per tax line. Do not include the year in this field. (Correct Example: FD1, Albany County, City of Albany)
26. **Tax Jurisdiction Description** – Literal description of tax being imposed. (example: Jones Fire District)
27. **OSC Muni Code** – 12 digit OSC muni code. One per tax line. This is the same code used in annual levy reporting to the Office of the State Comptroller (OSC). Example: If Highway Tax is authorized by the town use the OSC muni code for the town. If Highway Tax is authorized by the county, use the OSC muni code for the county.
28. **Tax Levy Type** – For each tax line, specify the tax levy type by using one of the codes listed below. **This information is necessary to match each group of related tax lines to the correct OSC Muni Code for proper eligibility determination.** It is important that you identify this information correctly in order to properly determine the credit. Example: If Highway Tax is authorized by the town, enter “**T**”. If it is authorized by the county, enter “**C**”.
- S** - School
 - C** - County
 - T** – Town or City
 - V** - Village
 - D** – Independent Special District*
 - F** – Fire District
 - L** – Library District
 - O** – Other – only use for re-levy tax, omitted tax, penalty tax, move tax or collection fees.
- *Independent Special Districts have authority over their own budget and are not subject to control by another level of government.
29. **Tax Levy** – For each tax line, enter the aggregate levy for the taxing jurisdiction, not the levy amount per parcel.
30. **Prop Tax Type** – Enter “**A**” for Ad Valorem or “**U**” for Unit/Usage charge. One per tax line. Ad Valorem is a tax based on the value of the real property. Unit/Usage charge is tax based upon a unit or measure such as the number of sewer hookups on a property, the amount of water used, etc.
31. **Tax Class** – Used to identify homestead versus non-homestead parcels. Specify “**H**” for Homestead, “**N**” for Non-Homestead, or “**S**” for Split. (For Nassau County Assessment Roll only, use the appropriate class code of 1, 2, 3, or 4). This is **only** used for taxing jurisdictions that have adopted homestead. Enter space if this does not apply.

32. **Taxable Value or Number of Units** - Taxable assessed value or number of units for each tax line **before reduction for STAR** (both Standard & Enhanced). One per tax line.
33. **Tax Rate or Unit Charge** – Tax rate per **thousand** or unit charge for each tax line on tax bill. One per tax line. **If you use a rate per hundred, you need to convert to rate per thousand.**
34. **Tax Due** - Tax due is without any interest, penalties or fees that may be associated with split payments. This should equal (Taxable Value/1000)*Tax Rate = Tax Due Amount **before reduction for STAR** (both Standard & Enhanced).

Unit/Usage Charge Example: If a municipality charges for sewer at a rate of \$75.00 per hookup, the Number of Units equals 000000000000100 and the Unit Charge should be 00075000000.

Property Summary Information:

35. **Total Tax Due** – Total amount of taxes due for the parcel.
36. **Total School Tax Due** – Total school taxes billed **after reduction for STAR** (both Standard & Enhanced). This field should contain all zeros for non-school data files.
37. **Total Assessed Value** – Total assessment value **before exemptions.**
38. **STAR Savings Amount** – Total STAR savings for the parcel (both Standard & Enhanced) - **for school tax bill extracts only.** This field should contain all zeros for non-school data files.

**PTF STANDARD DATA FILE
SPECIFICATION SHEET**

TRANSMITTER RECORD	FIELD NAME	FORMAT	START	LENGTH	DESCRIPTION
	RECORD IDENTIFIER	TEXT	1	1	Constant "T"
	SUBMIT DATE	DATE	2	8	MMDDYYYY
	TRANSMITTER'S ID NUMBER	TEXT	10	11	Transmitter's federal EIN or NYS tax identification number; left justify and fill with spaces; no hyphens in number
	TRANSMITTER'S NAME	TEXT	21	40	Organization transmitting the file; left justify and fill with spaces
	VENDOR INDICATOR	TEXT	61	1	"Y" if Vendor supplying file, "N" if Vendor not supplying file.
	FILE DESCRIPTION	TEXT	62	30	Optional, use when sending partial file or to explain special circumstance Left justify and fill with spaces
	SWIS COUNTY	TEXT	92	2	Primary 2 digit County code
	SWIS TOWN	TEXT	94	2	Primary 2 digit Town code
	SWIS VILLAGE	TEXT	96	2	Primary 2 digit Village code
ORPTS SCHOOL CODE	TEXT	98	6	Primary 6 digit ORPTS School code, fill with zeros if not school	
TAX ROLL TYPE	TEXT	104	2	From list of valid codes in the explanation section	
LEVY YEAR	TEXT	106	4	Enter the year when the taxes are levied, "2014" or "2015"	
CONTACT NAME	TEXT	110	30	Name of person submitting the file, left justify and fill with spaces	
CONTACT PHONE NUMBER	TEXT	140	16	Contact telephone number and extension; left justify and fill with spaces	
CONTACT EMAIL ADDRESS	TEXT	156	30	Contact email address; left justify and fill with spaces	
FILLER	TEXT	186	3997	Spaces	

PROPERTY INFORMATION

FIELD NAME	FORMAT	START	LENGTH	DESCRIPTION
RECORD IDENTIFIER	TEXT	1	1	Constant "D"
*SWIS	TEXT	2	6	6 digit SWIS code where the parcel is located with leading zeros
*SBL ID	TEXT	8	30	Local identifier for parcel, left justify and space fill
*SECTION	TEXT	38	3	3 digit Section Code with leading zeros
*SUBSECTION	TEXT	41	3	3 digit Sub Section Code with leading zeros
*BLOCK	TEXT	44	4	4 digit Block with leading zeros
*LOT	TEXT	48	3	3 digit Lot with leading zeros
*SUB LOT	TEXT	51	3	3 digit Sub Lot with leading zeros
*SUFFIX	TEXT	54	4	4 digit Suffix with leading zeros
PRINT KEY	TEXT	58	30	Print key, left justify and space fill
PROPERTY STREET NUMBER	TEXT	88	10	Property address street number, left justify and fill with spaces
PROPERTY STREET NAME	TEXT	98	30	Property address street name, left justify and fill with spaces
OWNER UNIT NUMBER	TEXT	128	10	Property address unit number. Required for condos and apartments only Left justify and fill with spaces
ORPTS SCHOOL CODE	TEXT	138	6	6 digit ORPTS School Code
PROPERTY CLASS CODE	TEXT	144	3	3 digit Property Class Code
OWNER 1 NAME	TEXT	147	40	Name to appear on check. Surname, space, first name, space, middle initial Left justify and fill with spaces
OWNER 2 NAME	TEXT	187	40	Second name to appear on check; fill with spaces if not applicable
ADDITIONAL NAME	TEXT	227	30	Use for attn., c/o, or trustee name; fill with spaces if not applicable
MAIL ADDRESS 1	TEXT	257	30	First line of address where check will be mailed
MAIL ADDRESS 2	TEXT	287	30	Second line of address where check will be mailed. Fill with spaces if not needed
CITY	TEXT	317	30	City Information. Left-justify and fill with spaces
STATE	TEXT	347	2	2 digit abbreviated state information. Use standard FIPS postal abbreviation
ZIP	TEXT	349	9	Left-justify and fill with spaces; no hyphens
COUNTRY	TEXT	358	25	Provide country code or name; fill with spaces if not needed.

EXEMPTION INFORMATION

FIELD NAME	FORMAT	START LENGTH		DESCRIPTION
EXEMPTION CODE	TEXT	383	5	ORPTS Exemptions code that exist on the parcel (One per exemption code)
EXEMPTION NAME	TEXT	388	10	Name of the exemption on the parcel (One per exemption code)
EXEMPTION VALUE	NUMERIC	398	13	Assessed value of each exemption on the parcel (One per exemption code) No decimal point.
EXEMPTION PURPOSE	TEXT	411	11	Applicability of each exemption on parcel (One per exemption code)
EXEMPTION FULL VALUE	NUMERIC	422	13	Full value on each exemption on parcel (One per exemption code) No decimal point.
EXEMPTION INFO #2		435	52	Repeat all Exemption Information Fields Above for each exemption
EXEMPTION INFO #3		487	52	Repeat all Exemption Information Fields Above for each exemption
EXEMPTION INFO #4		539	52	Repeat all Exemption Information Fields Above for each exemption
EXEMPTION INFO #5		591	52	Repeat all Exemption Information Fields Above for each exemption
EXEMPTION INFO #6		643	52	Repeat all Exemption Information Fields Above for each exemption
EXEMPTION INFO #7		695	52	Repeat all Exemption Information Fields Above for each exemption
EXEMPTION INFO #8		747	52	Repeat all Exemption Information Fields Above for each exemption
EXEMPTION INFO #9		799	52	Repeat all Exemption Information Fields Above for each exemption
EXEMPTION INFO #10		851	52	Repeat all Exemption Information Fields Above for each exemption
FILLER		903	104	Spaces (Only once. Not needed for each occurrence.)

Exemption data groups can accommodate 10 repeating occurrences. If your file requires additional repetition, please email proptaxbills.datafiles@tax.ny.gov with subject line "PTF Standard Data File Inquiry" and name of your taxing jurisdiction.

TAX LINE INFORMATION

FIELD NAME	FORMAT	START	LENGTH	DESCRIPTION
TAX JURISDICTION NAME	TEXT	1007	20	Name of tax being imposed as it appears on tax bill. One per tax line.
TAX JURISDICTION DESC	TEXT	1027	30	Literal description of taxing jurisdiction. One per tax line.
OSC MUNI CODE	TEXT	1057	12	12 digit OSC muni code. One per tax line.
TAX LEVY TYPE	TEXT	1069	1	From list of valid types in the explanation section. One per tax line.
TAX LEVY	NUMERIC	1070	15	Aggregate levy for taxing jurisdiction. No decimal point.
PROP TAX TYPE	TEXT	1085	1	Enter "A" for Ad Valorem or "U" for Unit/Usage charge. One per tax line. Fill with spaces if not applicable.
TAX CLASS	TEXT	1086	1	Used to identify homestead versus non-homestead parcels. One per tax line. From list of valid codes in the explanation section.
TAXABLE VALUE/# OF UNITS	NUMERIC	1087	(15,2)	Taxable Assessed Value or # of Units for each tax line on the tax bill before reduction for STAR . One per tax line. No decimal point.
TAX RATE/USAGE CHARGE	NUMERIC	1102	(11,6)	Tax rate per thousand for each tax line on the tax bill. One per tax line. No decimal point.
TAX DUE	NUMERIC	1113	(15,2)	Tax due for each line on tax bill before reduction for STAR . One per tax line. No decimal point.
TAX LINE INFORMATION #2		1128	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #3		1249	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #4		1370	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #5		1491	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #6		1612	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #7		1733	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #8		1854	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #9		1975	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #10		2096	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #11		2217	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #12		2338	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #13		2459	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #14		2580	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #15		2701	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #16		2822	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #17		2943	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #18		3064	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #19		3185	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #20		3306	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #21		3427	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #22		3548	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #23		3669	121	Repeat All Tax Line Information Fields above per tax line
TAX LINE INFORMATION #24		3790	121	Repeat All Tax Line Information Fields above per tax line
FILLER		3911	121	Spaces (Only once. Not needed for each occurrence.)

Tax Line Data Groups can accommodate 24 repeating occurrences. If your file requires additional repetition, please email proptaxbills.datafiles@tax.ny.gov with subject line "PTF Standard Data File Inquiry" and name of your taxing jurisdiction.

PROPERTY SUMMARY

FIELD NAME	FORMAT	START LENGTH		DESCRIPTION
TOTAL TAX DUE	NUMERIC	4032	(15,2)	Total amount of taxes due for the parcel after reduction for STAR . No decimal point.
TOTAL SCHOOL TAX DUE	NUMERIC	4047	(15,2)	Total school taxes billed after reduction for STAR . (This field should contain zeros for non-school data file) . No decimal point.
TOTAL ASSESSED VALUE	NUMERIC	4062	(15,2)	Total Assessment Value before exemptions . No decimal point.
STAR SAVINGS AMOUNT	NUMERIC	4077	(15,2)	Total STAR savings for the parcel. (For files that include school tax bills only.) (This field should contain all zeros for non-school data) . No decimal point.
FILLER	TEXT	4092	90	Spaces
END LINE	TEXT	4182	1	Constant "E"

FINAL RECORD

FIELD NAME	FORMAT	START LENGTH		DESCRIPTION
RECORD IDENTIFIER	TEXT	1	1	Constant "F"
NUMBER OF "D" RECORDS	NUMERIC	2	10	Total number of "D" detail records on file, right-justify and zero fill. No decimal point.
FILLER	TEXT	12	4171	Spaces