NEW YORK STATE | Department of Taxation and Finance

Income Greater Than $250,000 Report (Report #2) Instructions

March 15, 2021

Overview

The *Income Greater than $250,000 Report* (Report #2) lists STAR recipients with incomes greater than $250,000. By law, these property owners are no longer eligible for the STAR exemption.

Wherever possible, we will issue the report at least 20 days prior to tentative roll date. Review the report and remove the Basic and Enhanced STAR exemptions from the properties listed in the report.

After selecting the SWIS code for your jurisdiction and entering additional search criteria, the report returns the following fields:

SWIS code	Print key	Mobile home co-op	Property address	Names	Property class on last roll	Date of Report

For the full report, select *Download Report*.

RPSV4 users can run a utility to remove the Basic and Enhanced STAR exemption from impacted properties. See instructions below.

Users of other software must manually remove the Basic and Enhanced STAR exemptions from the properties listed in the report.

Instructions for RPSV4 Users

To remove the Basic and Enhanced STAR exemptions from the properties listed in this report, run the *STAR Disqualification Update Utility*.

Before running the utility, you must:

- export the RPS Bulk File for Report #2,
- back up your database, and
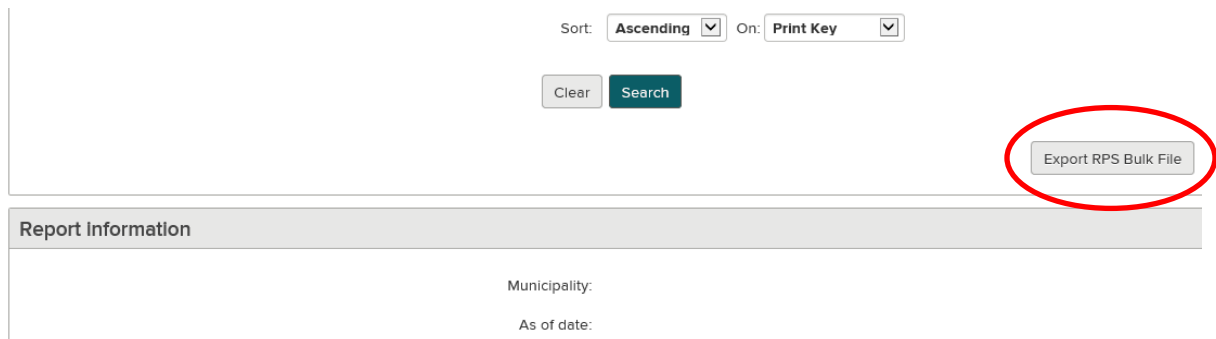- install all RPS software release updates. (See Real Property System.)

Upon completion, exemptions and taxable values within the municipality will automatically be updated.

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

Addtionally, exemptions for those parcels in a cooperative or manufactured home park will not be included in this update and must be reviewed and manually removed at the parcel level.
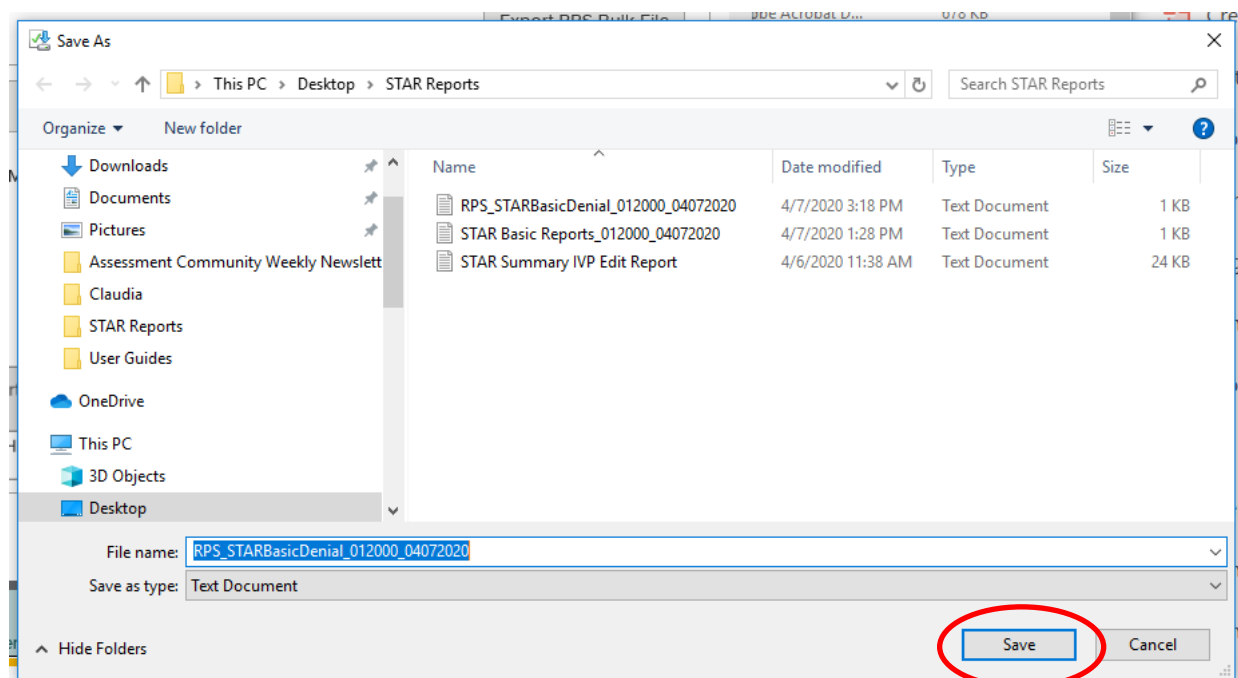
How to run the STAR Disqualification Update Utility

1. After selecting your SWIS code and search criteria and the results are displayed at the bottom of the page, select *Export RPS Bulk File*.

2. Select *Save as*.
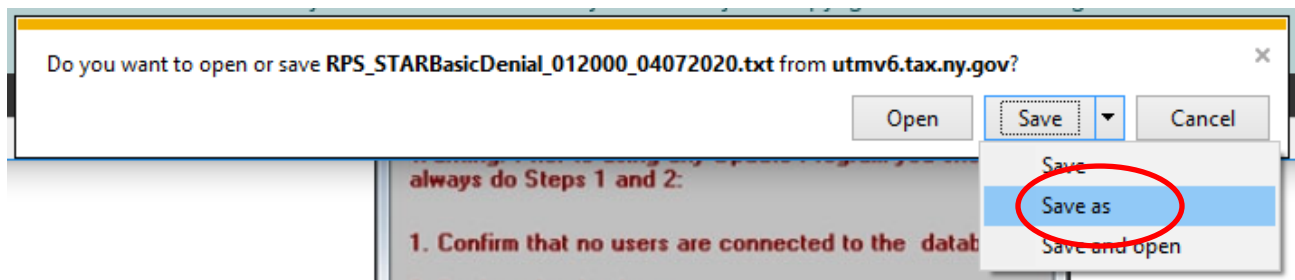
3. Designate where you want to store the file. (In the following steps, you'll need to remember where you stored it). Do not change the *Save as type.* Select *Save.*

4. In RPSV4, select *Administration* on the Navigation Screen to open the Administrative Toolbar.

5. Select *Update Programs.*

6. Scroll down and select S*TAR Management, and* then select *OK*.
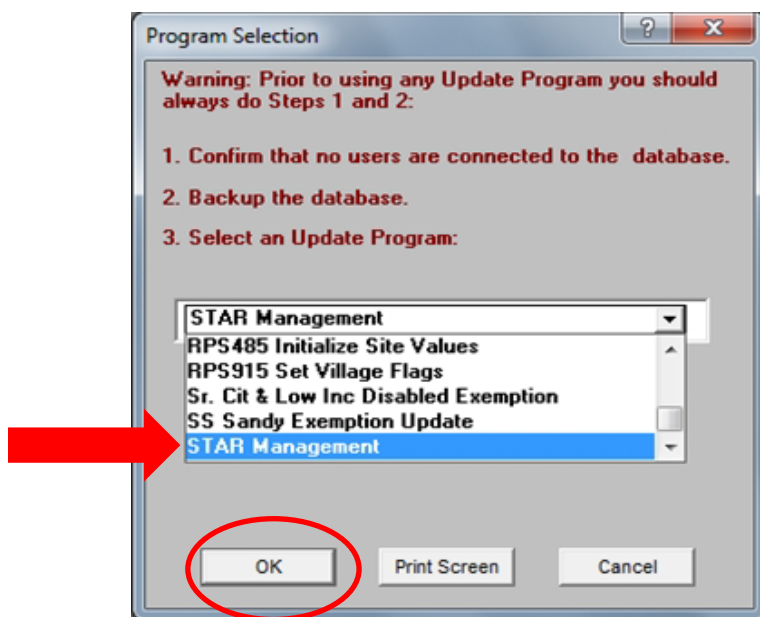
If you do not see the STAR Management option, verify that your *User Update Rights* are set for *STAR Management.* You may need to check with your Security Group Administrator.
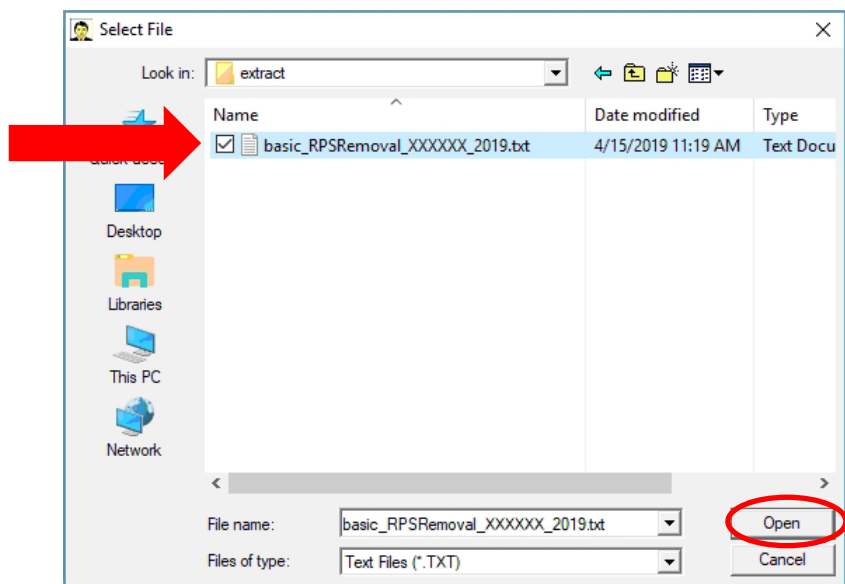
7. On the *STAR Management* screen, select *STAR Disqualification Update.* Select *OK*.
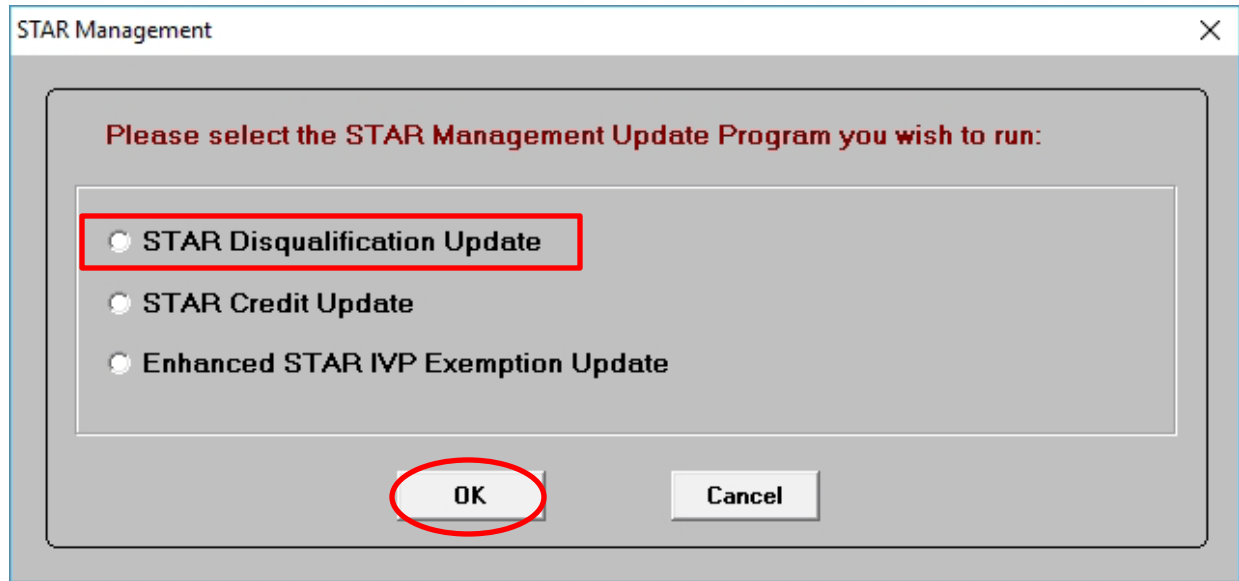
8. On the *STAR Exemption Disqualifcation Update* screen, select *Import NYSDTF File*.
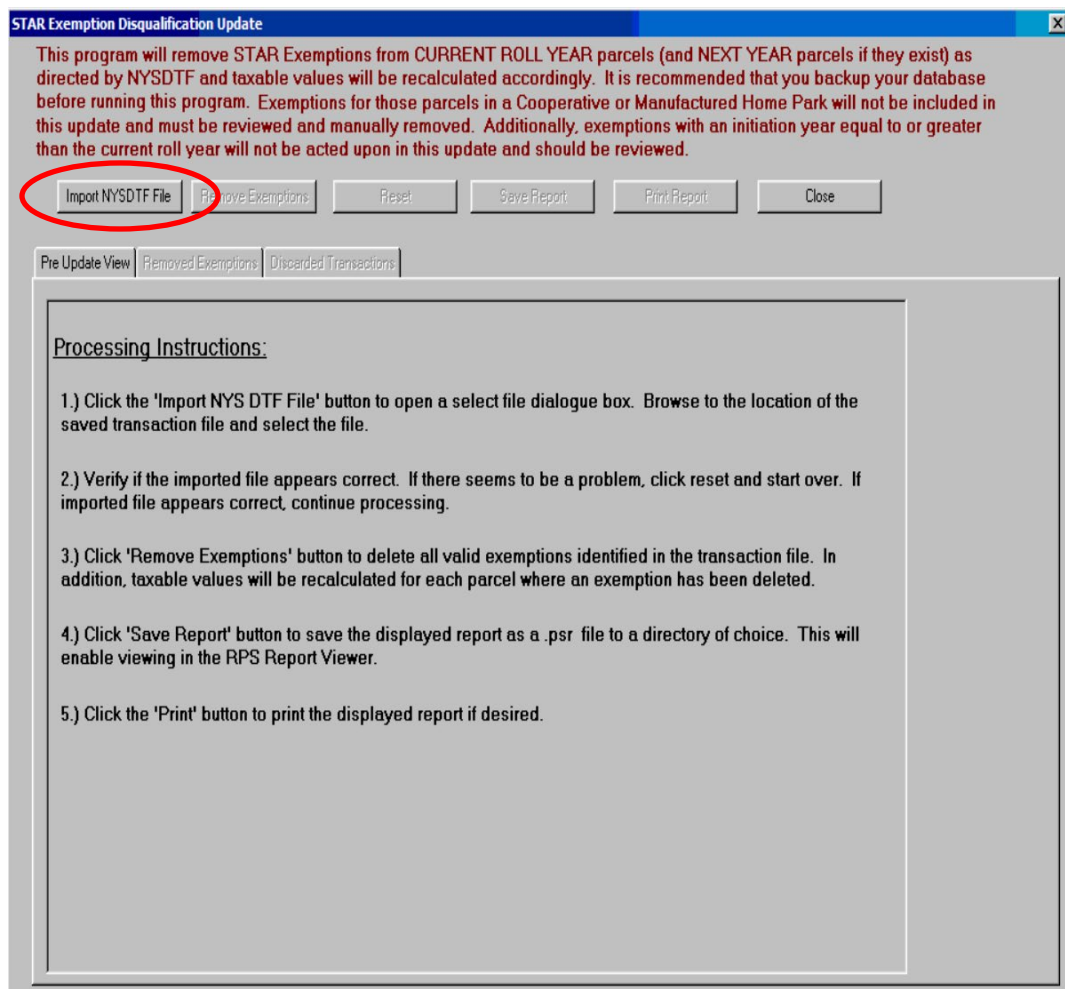
9. Browse to the location where you stored the file, click on the file and select *Open*.

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.

10. 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.
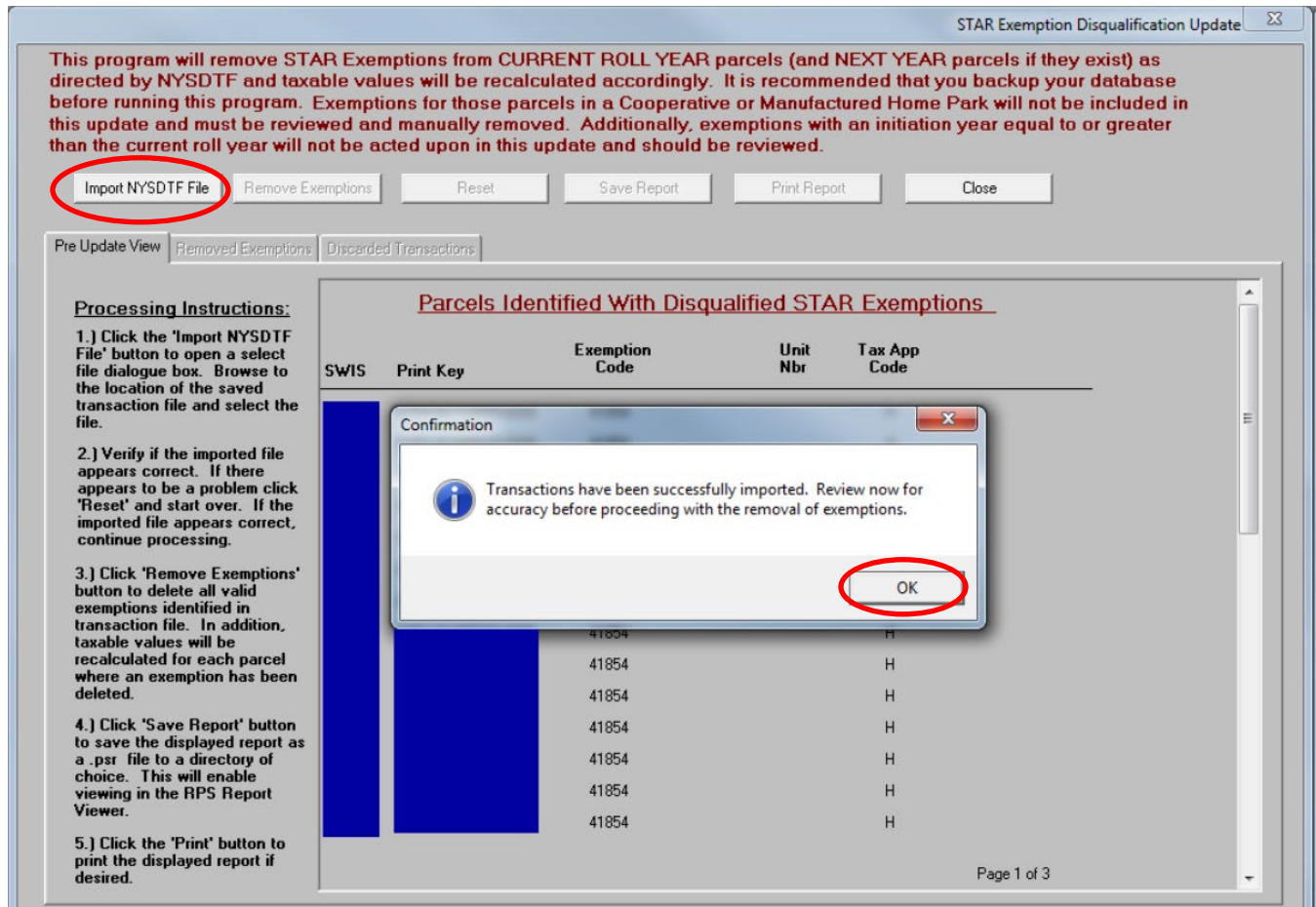
*If the file does not appear appropriate, "x" out of the confirmation message and go back to the *Import Enhanced STAR IVP File* and select the correct file. If you continue to have an issue, contact your ORPTS Customer Service Liaison.

11. Select *Remove Exemptions* to update the database.

This Update program will first remove exemptions on the Current Roll year (and on the Next Roll year if it exists) from parcels listed on the transaction file and will then automatically run a recalculation of taxable values for all parcels in the municipality. The update program can take from five to twenty minutes depending on the size of the municipality (and may take longer if the Next Year roll exists).

After processing is complete, a report of the removed exemptions will display in the *Removed Exemptions* tab.

Discarded Transactions file
Parcels listed on the imported transaction file that did not have the exemption removed will appear in the *Discarded 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.

Parcels on the *Discarded Transactions Report* with any of the reasons below should be reviewed and manually updated if appropriate.

- If a parcel does not have a Basic or Enhanced STAR exemption, the following message will display in the Reason column:

  Exemptions transactions found to have been already removed

- If a parcel listed on the imported transaction file is either a cooperative building (owner code = 'P' or 'Q') or a mobile home park (property class = 416), no action will be taken. The following message will display in the Reason column:

  Mobile Home and Cooperative transactions, not acted upon mechanically and subject to manual intervention.

- Parcels where the basic exemption exists in the current year; however, the exemption initiation year is greater than or equal to the roll_yr. This message will display in the Reason column:

  Exemption transactions where EX_INIT_YR equal or greater than Current Year

To process another file for a different municipality, select *Reset*, and choose the new file.