2023 Summer
Database Reminders
To Complete PRIOR to Upload to County Cloud
** AutoCalc Mode **

- ❑ Download latest version of BS&A Tax System
- ❑ Utilize 'New Tax Year Database Wizard' to create database
  - 'Select Recommended' Information to Copy ~ BS&A
- ❑ Clean Special Assessment/Drain (*if copied file from previous year*)
  - Delete ALL Drains prior to Winter import
  - Delete any local unit Special Assessment you will not reuse
- ❑ Verify No Special Assessment levied to Retired or Zero TV Parcel
- ❑ Verify Interest & Penalty Setup ~ (*City Dates/Rates per Charter*)
  - Update Last Date to Pay w/o Interest dates (**1%**)
    - **Summer 09/14/2023**
  - Update Last Date to Pay w/o Penalty dates (**3%**) ~ (**0%**)
    - **Summer 02/14/2024** **02/28/2024**
  - Update Stop Charging Interest/Penalty
    - **Summer 02/28/2024**
- ❑ Verify Fiscal Year information
- ❑ Update Summer Tax Bill Messages
- ❑ Update DDA/LDFA/CIA Millage Exclusions
- ❑ Verify Property Class List – **Act 415 Use: Building on Leased Land**
  - **OLD** 105 ~ 205 ~ 207 ~ 303 ~ 305 ~ 407 ~ 408
  - **NEW** 110 ~ 210 ~ 310 ~ 410 ~ 610
- ❑ Verify all information from the ***Tax Names and Millage Rates Report***
  - Tax Names (*Consistent Spelling/Spaces*)
  - **Millage Rates (*from L-4029*)**
  - Admin Fee
  - Tax Type
  - Billing Options (*PRE - Non PRE*)
  - Billing Classes (*MBT - Ind Pers/Comm Pers*)
- ❑ Verify all information from the ***Standard Warrant Report***
  - Taxable Value by School District (*to Assessor's Warrant Values Report*)
- ❑ Verify all information from the ***Standard Tax Roll Report*** (*Totals Only*)
  - Taxable Value ~ PRE/Non PRE Values (*to Assessor's Warrant Values Report*)
  - Leased Land (*Did you have last year? Probably have again this year*)
  - Tax Names (*Errors easier to spot - will create multiple lines*)
- ❑ Print Sample Tax Bill ~ Change Tax Bill Due Date (*Report Options*)
  - Verify all messages print correctly & completely
  - **I do NOT have a copy of YOUR tax bill form & CANNOT verify**