

How to use the new AA Cap codes

1. If you are rolling CAMA and using Future Year

First export non future year values. The capped values, sales, parcel ranges. Basically you export cama and import to AA like normal. Get that all done.

Then, work CAMA future year parcels. Please contact your OTC field representative for questions about using the future year in CAMA .

Future year values are added to the AA market value. The AA import/update program can only be run ONE time.

This example has a parcel of real estate that had a room added to the home and a new out building. Here is how the AA parcel looks **before** the import of future year CAMA. There does not have to be any changes to the AA record. No cap status or cap codes have to be entered before you import cama **future year** values in this example.

The screenshot shows a software window titled "Real/Personal Update" with the following information:

- Parcel Number: 0005-00-019-001-0-000-00
- Name: DOCKERY, WILBURN E. & KONDA
- Values Changed Date: 3/31/2008 (C.R.)

	Market/Use	Assessed	Value from CAMA
Land Value:	1,800	234	1,800
Improved Value:	12,648	1,644	16,704
Miscellaneous:	1,633	212	1,633
Mfg Home Value:	0	0	0
Total:	16,081	2,090	20,137

Additional fields include:

- Freeze Status: Code:
- Base Homestead: 1,000 Lock Base
- Double Homestead: 0 Status Lock Double
- Cap Status: Code:
- Disabled Veteran: 0 Disabled Veteran
- Total Exemption: 1,000
- Net Assessed: 1,090

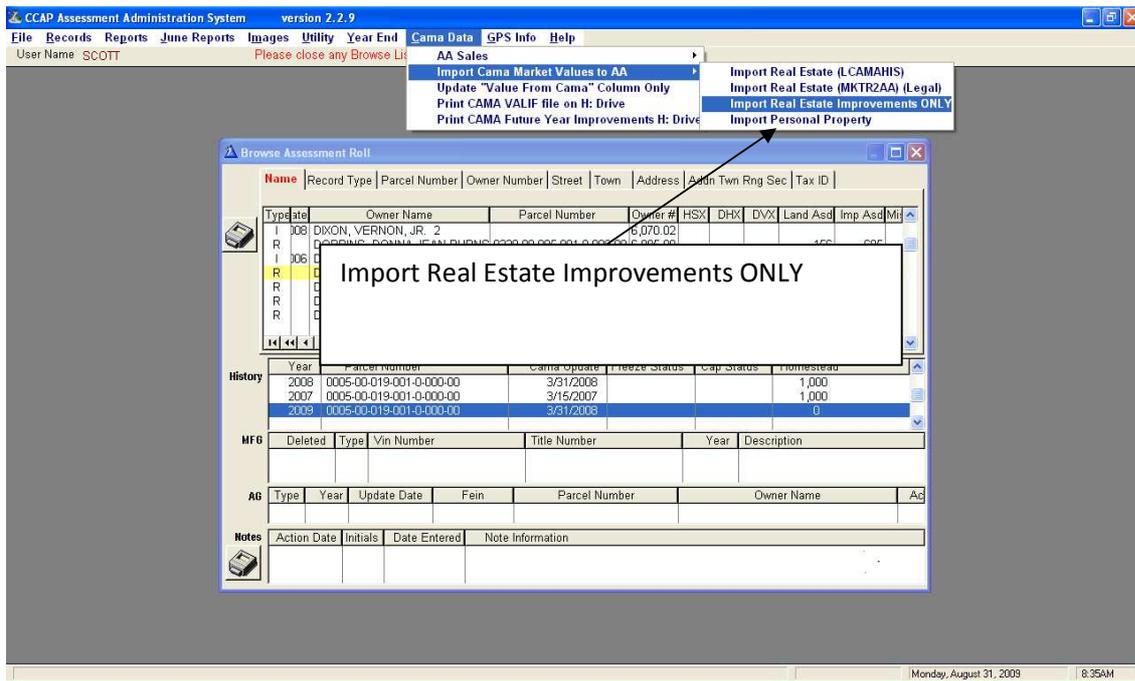
Buttons at the bottom: Record will be Changed, Insert/Update, Cancel/Close, print this, Delete Record

Follow the proper rules to add the room add on and the miscellaneous out building to the cama future year files.

When it comes time to import **CAMA** values in the spring you run 2 programs.

1. Export **CAMA** future year values (see your OTC field rep).
2. **Import CAMA** future year values **into the AA system.**

Select Import **CAMA** Market Values to AA, Import Real Estate Improvements ONLY.



Import improvements into AA system

This is what the AA improvement import program looks like. This screen has a yellow background. You must run the CAMA future year **export** program first. The CAMA **export** program and this AA **import** program are run once a year, between late January and April, after the Current year values are imported.

Import CAMA Improvements Only From Future Year Data

Real Property Future Year Improvement Import
Select the options to process

Edit the market value of the CAMA improvements ONLY
(No value or history master file updates)

Edit and UPDATE the market value of the CAMA improvements
If this option is checked the improvements from the CAMA future year file will be ADDED to the current market value of the record
You can run this UPDATE option ONLY ONE TIME.

Print market improvements import report

Print the market improvement import ERROR report

OK Cancel/Close

It will produce two reports. The reports print a list of improvements imported to AA, and a list of errors.

This is what the AA screen will look like after you import future year **CAMA** improvements into the AA system.

Real/Personal Update (0005-00-019-001-0-000-00 Name>DOCKERY, WILBURN E. & KONDA B. Owner #> 6,09...

The future year improvement market value is **added** to the improved market value. Land market value is **not** updated when using the cama future year program.

Values Changed Date	Market/Use	Assessed	Value from CAMA
8/31/2009 SWW	Land Value:	234	1,800
	Improved Value:	3,731	28,700
	Miscellaneous:	212	4,633
	Mfg Home Value:	0	0

The future year miscellaneous value is **added** to the AA miscellaneous market value. Mfg Home market value is updated if needed also. This parcel did not have any Mfg Home improvements.

Change Initials: | Double Homestead: 0 | Status Lock Double

Status Date: |

Cap Status: | Code: CI

Change Initials: SW

Status Date: 5/12/2010

Net Assessed: 3,177

Record will be Changed | Insert/Update | Cancel/Close | print this | Delete Record

The AA program will also change the **Values Changed Date**. The AA program will also change any valid current sale cap code of UT to a TI to show there was a sale in the prior year that had a future year improvement applied and UI to CI to show future year improvement updates.

Another new code is the **SV** or “special value”. It is used when the value from CAMA is a true value override. When you need to match a value due to a Board of Equalization decision, court ruling or special use property, you should use the value override screen and SV code. When you use SV you must also put the current assessment year, just like you use **CI** Status Date.

2. If you are *not* using CAMA and doing *all* data entry by hand

This example we will look at the new codes if you are **not importing CAMA current year or future year**. All data entry will have to be done by the user.

This parcel sells.

Market values increased to sale price.

DUNAGAN, DONALD L. &

Values Changed Date	Market/Use	Assessed	Value from CAMA
8/31/2009 SWW	Land Value: 15,524	2,018	15,524
	Improved Value: 25,823	3,357	25,823
	Miscellaneous: 5,096	662	5,096
	Mfg Home Value: 0	0	0
	Total: 46,443	6,037	46,443

Freeze Status: Code: ? Base Homestead: 1,000 Lock Base

Change Initials: Status Date: Double Homestead: Status: Lock Double: ?

Cap Status: Code: UT ? Disabled

Change Initials: SW Status Date: 8/31/2009

Total Exemption: 1,000

Net Assessed: 5,037

Record will be Changed

T goes in the Cap Status field,
UT in the Cap Code field,
Sale date in the Status Date field.

Now some improvements are added to the parcel the same year as the sale (2010) and be included in the current assessment year (2011).

Real/Personal Update (0000-14-01N-02E-4-000-00 Name>DUNAGAN, DONALD L. & Owner #> 6,250.00

General Info | Real Property | Values | Pictures | Change Notice Comment

The full amount of the improvement is added to the market value.

Values Changed Date	Market/Use	Assessed	Value from CAMA	3/31/2008
8/31/2009 SWW	Land Value:	15,524	2,018	15,524
	Improved Value:	45,000	5,850	25,823
	Miscellaneous:	5,096	662	5,096
	Mfg Home Value:	0	0	0
	Total:	65,620	8,530	46,443
	Base Homestead:	1,000		<input type="checkbox"/> Lock Base

Freeze Status: Code: ?
 Change Initials:
 Status Date:

Cap Status: Code: TI ?
 Change Initials: SW
 Status Date: 8/31/2009

I is entered in the Cap Status field to unlock the value
TI is used in the Code field to show there was also a sale on this parcel.
Status date stays the date of the sale.

Total Exemption: 1,000

Net Assessed: 7,530

Record will be Changed

Now let's look at a parcel that has improvements. Remember we are **not** importing cama current or future year.

The screenshot shows a software window titled "Real/Personal Update (0000-18-04N-08E-3-002-00 Name>DYCK, HEIN OR EVA Owner #> 8,110.00)". The window has several tabs: "General Info", "Real Property", "Values", "Pictures", "Change", "Notice", and "Comment". The "Values" tab is active.

Parcel Number: 0000-18-04N-08E-3-002-00 Name: DYCK, HEIN OR EVA

Values Changed Date: 3/31/2008 C.R.

Market/Use	Value
Land Value:	1,460
Improved Value:	65,250
Miscellaneous:	513
Mfg Home Value:	0
Total:	67,223

Freeze Status: Code: ?

Change Initials:

Status Date:

Cap Status: Code: **UI** ?

Change Initials:

Status Date: 1/01/2011

Base Homestead:

Double Homestead:

Disabled Veteran: 0 Disabled Veteran

Total Exemption: 1,000

Net Assessed: 7,740

Buttons: Record will be Changed, Insert/Update, Cancel/Close, print this, Delete Record

Callout Box:

- Amount of improvement is added.
- I** to unlock increase in value
- UI** to show improvement added
- Current assessment year used for data entry.

Record is then updated. It is important to use the proper codes. The codes can be used later to run reports and print lists of parcels that have been improved over the years.

Another new code is the **SV** or "special value". When you need to match a value due to a Board of Equalization decision, court ruling or special use property, you should use the SV code. When you use SV you must also put the current assessment year, just like you use **CI** Status Date.

3. If you are importing CAMA, not using future year, and are using CAMA Override screen for new improvements

What if we are importing CAMA and we are not using future year. Well you still need to go to CAMA and calculate the 5% increase then add the improvements to your total and use the value override feature in CAMA. We have a new code for that and its CI for CAMA improvements.

The screenshot shows a software window titled "Real/Personal Update (0000-04-05N-01E-0-002-00 Name>ROBERTS, MONTY JOE Owner #> 16,270.00)". The interface includes tabs for "General Info", "Real Property", "Values", "Pictures", "Change Notice", and "Comment".

Parcel Number: 0000-04-05N-01E-0-002-00
Name: ROBERTS, MONTY JOE

Values Changed Date	Market/Use	Assessed	Value from CAMA
3/31/2008			3/31/2008
Land Value:	15,621	2,031	16,347
Improved Value:	20,509	2,666	25,705
Miscellaneous:	22,234	2,890	40,019
Mfg Home Value:	0	0	0
Total:	58,364	7,587	82,071

Freeze Status: Code: ?
 Change Initials:
 Status Date:

Base Homestead: 1,000 Lock Base ?
Double Homestead: 0 Status Lock Double ?

Cap Status: Code: ?
 Change Initials:
 Status Date:

Disabled Veteran: 0 Disabled Veteran

Total Exemption: 1,000

Net Assessed: 6,587

Record will be Changed

So, 5% of this parcel is 2,918. The improvements added were \$15,000. So the value override record in CAMA will show the total of these values.

Override

Password

Override Date

Override Delete Date

Override Type

 N/A

Land Override

Misc Override

Bldg Override

Mbl Hm Override

Total Override

76282

Override Notes

\$15000 ADDON

So our parcel will look like this after the CAMA export and AA import program runs. Using the CAMA value override for added improvements.

Parcel Number: 0000-04-05N-01E-0-002-00 **Name:** ROBERTS, MONTY JOE

Values Changed Date: 8/31/2009 **Market/Use:** SWVV **Assessed:** **Value from CAMA:** 3/31/2008

Land Value:	16,595	
Improved Value:	36,481	
Miscellaneous:	23,206	
Mfg Home Value:	0	
Total:	76,282	

Freeze Status: **Code:** **Base Homestead:**

Change Initials: **Double Homestead:**

Status Date: **Disabled Veteran:**

Cap Status: **Code:** CI **Total Exemption:**

Change Initials: SW **Net Assessed:** 8,917

Status Date: 1/01/2010

Record will be Changed

The market value in AA is changed to what came over from the CAMA value override record.

A CI and the **current assessment date** must be entered **before** you run the cama export and AA import programs. **The date must be during the current assessment year. That is, it must be the same year you are dumping values.**

The new **CI** code unlocks the parcel to allow for 100% of whatever CAMA value override wants the value to be.

Another new code is the **SV** or "special value". It is used when the value from CAMA is a true value override. When you need to match a value due to a Board of Equalization decision, court ruling or special use property, you should use the value override screen and SV code. When you use SV you must also put the current assessment year, just like you use **CI** Status Date.