

Beginning of Year Procedures

1. **Entry of Millage Rates** - AIS will copy your previous year millage rates to the new year. This will allow you to edit the rates and make any needed changes for the new year.
2. **Rollover and extension of current taxes** - Once the millage rates are in the system for the new year, AIS will rollover the data from the Assessor for current taxes only. You will then need to review this information to verify the conversion.

IMPORTANT: At this point, the process stops until the rollover has been verified. This includes balancing your original charge report to the Assessor's abstract. It is recommended that you make a list of each issue in your county and look at a couple parcels in each category. Examples include real estate parcels with timber tax, improvement districts, and homestead credits; personal property with late assessment fees or special improvement district type issues; taxpayer assignments (if sent from your assessor); exempt parcels of various types.

3. **Reassignments** - Once the conversion of the current taxes is verified, taxpayer reassignments may be done. AIS will send your county a list of options on how these will be handled. (See separate TSB on that subject). However, reassignments do not necessarily need to be done before the books open, unless taxpayer information is printed on your tax book.
4. **Rollover other information** - This step will vary from county to county. Certain information that is not maintained by the Assessor may be carried forward from last year. For example, if your Assessor does not maintain the improvement districts, these will be addressed at this time.
5. **Books and Recap** - Once you get to this step, you are ready to print your books and recap. Once this step is complete, call us and we will set your system to allow current year changes.

Other Changes - Once your books and recap are complete, you can then operate as normal. Taxpayer assignments, Assessor corrections, and other changes can now be processed.