

Assessor End of Year Procedures

Real Estate

The most important thing to remember is that WinCAMA uses a “perpetual file”, in that you don’t have separate files for each year. What this means is that we must get to a point in time where we can say that everything has been entered for the current year, but no data has been put in for next year. That is the condition we want to send to the Collector.

For counties using our Collection system, you can call our office at this point and have us “freeze” the file. This creates a special rollover file with your real estate information for the Collector. When we setup their collection files, we will do it from this file as opposed to your live CAMA files. This allows you to then begin next year’s work.

For counties not using our Collection system, this is when you should plan on running your procedures to upload your final data to the Collector's Office. This effectively does the freeze mentioned above. We do recommend that you hold off making any additional changes in CAMA until you have verified that the data uploaded as expected.

In either case, immediately after this freeze or upload is complete would be the appropriate time to run an abstract report. This abstract will then match what the Collector will receive. This is critical if you are going to balance your abstract to their original charge or recap. Once this process is complete, if you make any further changes for year you are completing, you will need to send correction notices to the Collector.

Personal Property

Basically, everything that was said for Real Estate is true for Personal as well, with one exception: we do have separate files for each year. This makes managing the data easier.

For counties running our collection system, we can keep this file open right up until the time we actually create the Collector’s files, if you wish. This will allow you to continue to make changes up until the last minute. We will let you know when we are transferring information over. Note that it is certainly possible to freeze Personal Property as well, if you have a specific time that you want to do that. For counties not using our collection system, everything centers once again around running the upload process.

Once the data has been transferred to the Collector (either directly, by freezing, or upload), you should run your abstract for balancing. Changes from this point on require a correction slip.