

Working With Assessment History

The Assessment History screen is the most critical screen in WinCAMA, as it determines the legal values for the parcel. With the various laws that influence value determination, manipulating assessment history lines can often be confusing. Before we look at the various ways to create and edit assessment history, let's begin with reviewing some basic facts about assessment history:

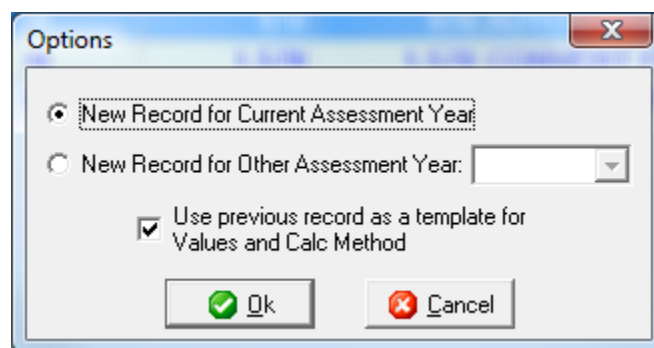
The current legal assessed value for a parcel is determined by the top-most line in the assessment history screen for the given assessment year or earlier. Remember that if the value does not change, a new line does not have to be created every year. That top line value will continue to be in effect until replaced by something else.

A parcel is not considered to be officially “on the books” until it has at least one assessment history line. A parcel with no records in assessment history will not be rolled over to the Collector. This allows the Assessor in the fall to put new subdivisions for the following year in the system and begin to sketch and price them without them rolling over. A parcel that is exempt should have an assessment history line created with a 0 value to ensure that it will be sent to the Collector.

Future lines are special assessment history lines that do not carry any value information, but record future homestead status changes.

The Assessment History screen allows the user to go back and review the entire valuation history of that parcel. Because of this, assessment history lines are not edited or deleted often. AIS recommends only editing or deleting a line that was entered in error. Once a line is considered to be the official value at any point in time, any changes to that line—even in the same year—should be done by creating a new line above it to show the historical changes in value.

When adding a new assessment history line, this screen will be displayed:



The default is to create the new record for the current year. This is the simplest case. A new assessment history record will be created, with the default information coming from the previous records in the system. This record can then be edited with the correct information and saved. Keep in mind that the default values always come from previous assessment history lines and never from the calculated value. If you wish to use the calculated value, you must use the Paste Calc Values button on the edit screen.

If you are creating an assessment history line for a prior year, select the 2nd open and select the appropriate assessment year from the drop-down list. When creating prior year assessment history options, the default is to again copy information from the previous records as a default. This will create a new record using the same calculation method as the previous record, carry all the values forward, and then allow you to make changes. This works similar to the old version's Clone button, but with more functionality. The old Clone button would only allow you to copy the record to another line of the same year, which made the process of filling in a gap in assessment years difficult. The new option window allows you to—in a single step—create the new year line and copy the values from the previous line.

If you choose to uncheck the box to use the previous record as a template, you will be given the option for which calculation method to use for the new line. This allows you to correct issues when the original line for the prior year was created using Amendment 79, but the new corrected line should be at full value. For your convenience, some of the valuation information from the previous line will still be carried forward as a default, but you are free to change any of it as needed.

Once the valuation data has been entered, you can view the details of the Effective Value calculation by changing to that tab. The entire computation from beginning to end is detailed there for your review. Each figure in blue can be pointed at with the mouse for a pop-up explanation of that number. The computation hinges on the "Allowed Increase" number, which is where the application of all the laws takes place. Pointing to those numbers will tell you which rule the system used to determine that value.

Upon saving the edits, if the record is for a previous year, the system will compare the final values and homestead conditions you saved with the values prior to your edits. If either the value or the homestead status changed, you will be prompted to generate the appropriate type of correction. Under normal circumstances, this is what you should do. The system does give you the option of saving without generating a correction notice for those situations where you are trying to correct the data entry in the screen but know the Collector already has the correct values.

Please note that if you edit an assessment history line and then hit save, the record will be marked as edited by you on the current date, even if you did not actually make any changes. If you edited the record just to look at some details, be sure to hit cancel to exit. Note that if the only reason you are editing is to read the complete comment, you can see this from the grid by highlighting the row and then clicking the word "Comment" in the grid title. This will pop up a box with the entire comment text without requiring you go to the edit screen. Note this also works for public access users and others that do not have edit security.