STAR Credit Eligible Report (Report #8) Instructions

August 1, 2025

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Overview

The STAR Credit Eligible Report is available prior to school tax bill processing so that the bills for STAR credit recipients can include the following statutory language:

> *An estimated STAR has been or will be issued to you by the NYS Tax Department. Any overpayment or underpayment can be reconciled on your next tax return or STAR credit.*

If a registered property owner does not appear on your list, this does not mean they won't receive a STAR credit check this year; we continue to approve registrations daily after this report is issued.

Wherever possible, we will issue the report one month prior to the date school tax bills are issued.
The report returns the following fields:

- SWIS code
- Property Key
- Print key
- Mobile home co-op
- Property Address
- Names
- Property class on last roll
- Date of Report

For the full report, select either *Download Report (Text)* or *Download Report (Excel)*. For more details, see How to Access and Download STAR Reports.

What to do next

Use the report to update your files before school tax bills are processed. County staff responsible for database updates must select municipal transaction files individually.

RPSV4 users, see the instructions beginning on page 2.

Localities that do not use RPSV4 will use the report to update their roll files.

Note: Because tax bills do not include the dollar amount of the STAR credit, you will not indicate whether the property owner will receive the Basic or Enhanced STAR credit. Therefore, only the *99999* code is necessary to designate property owners who will receive either the Basic or Enhanced STAR credit.

Instructions for RPSV4 users

To update the affected parcels, RPSV4 users can use the STAR Credit Update Utility. You will have the option to select the roll year against which transactions will be applied. Processing instructions are also contained within the STAR Credit Update user interface.

Prior to adding new marker codes, this program will remove any existing marker codes currently on the database within the municipality except for mobile homes and cooperative units – you must remove these manually at the parcel level.

During the update process, any existing STAR exemption on a parcel targeted to have a marker code added will have that STAR exemption removed prior to the addition of a marker code.

Following the addition of new marker codes, this update program will automatically run a recalculation of exemptions and taxables within the municipality.

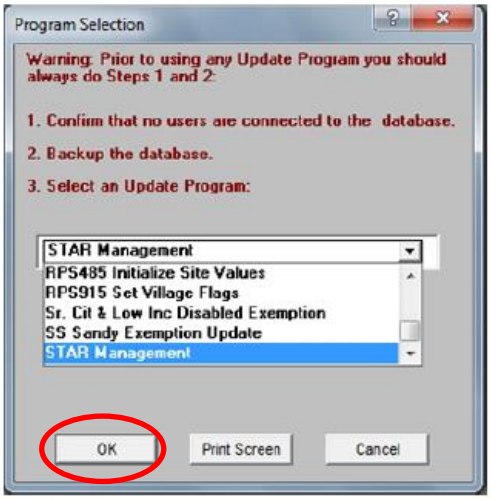
Before running the utility, you must:

- export the RPS Bulk File for Report #8,
- back up your database, and
- install all RPS software release updates. (See Real Property System.)

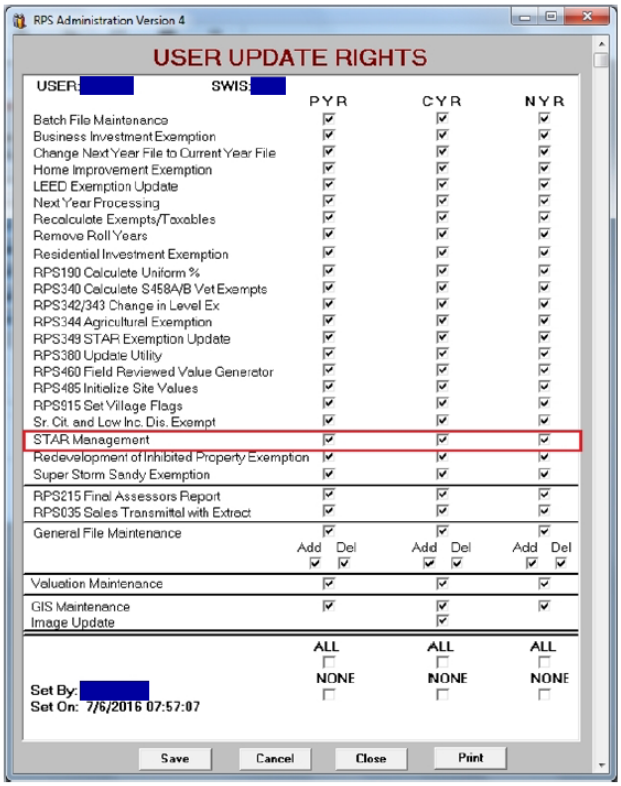
Note: Marker codes for those parcels in a Cooperative or Manufactured Home Park will not be included in this update and must be reviewed and manually added at the parcel level.

How to run the RPSV4 STAR Credit Update Utility

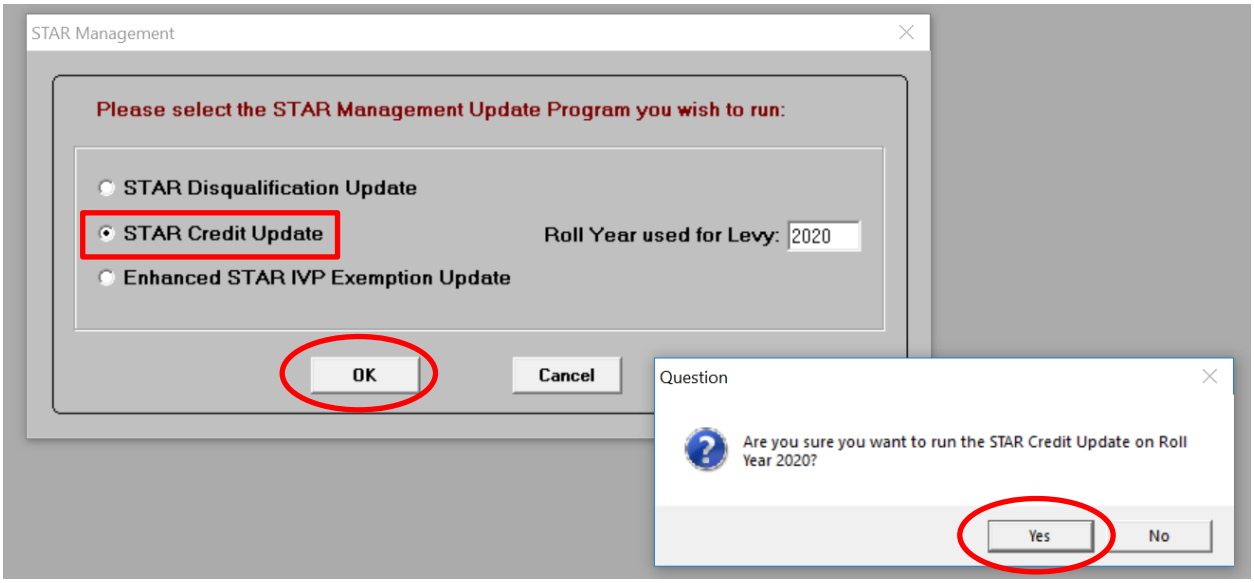
1. Select *Administration* on the Navigation Screen to open the Administration Toolbar.
2. Select *Update Programs*.
3. Scroll down and select *STAR Management,* then select *OK*.



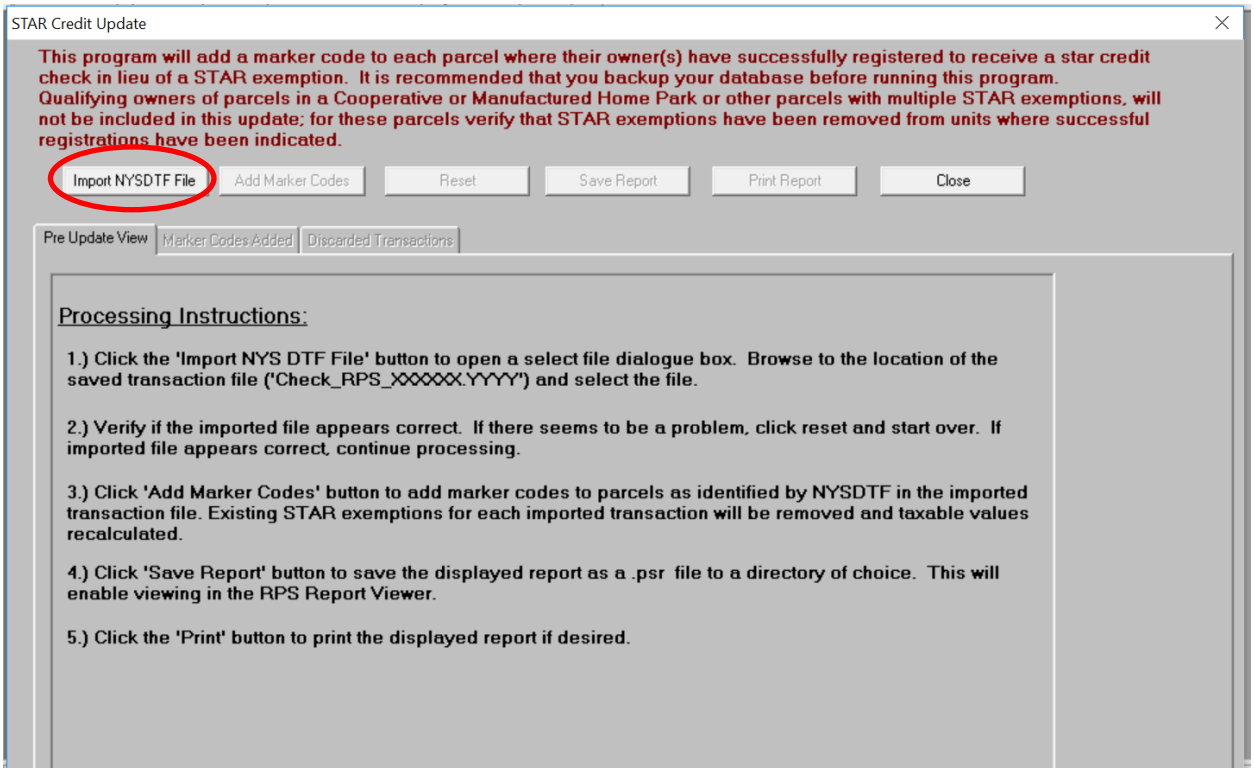
Note: If you do not see the STAR Management option, verify that your *User Update Rights* are set for STAR Management or check with your Security Group Administrator.



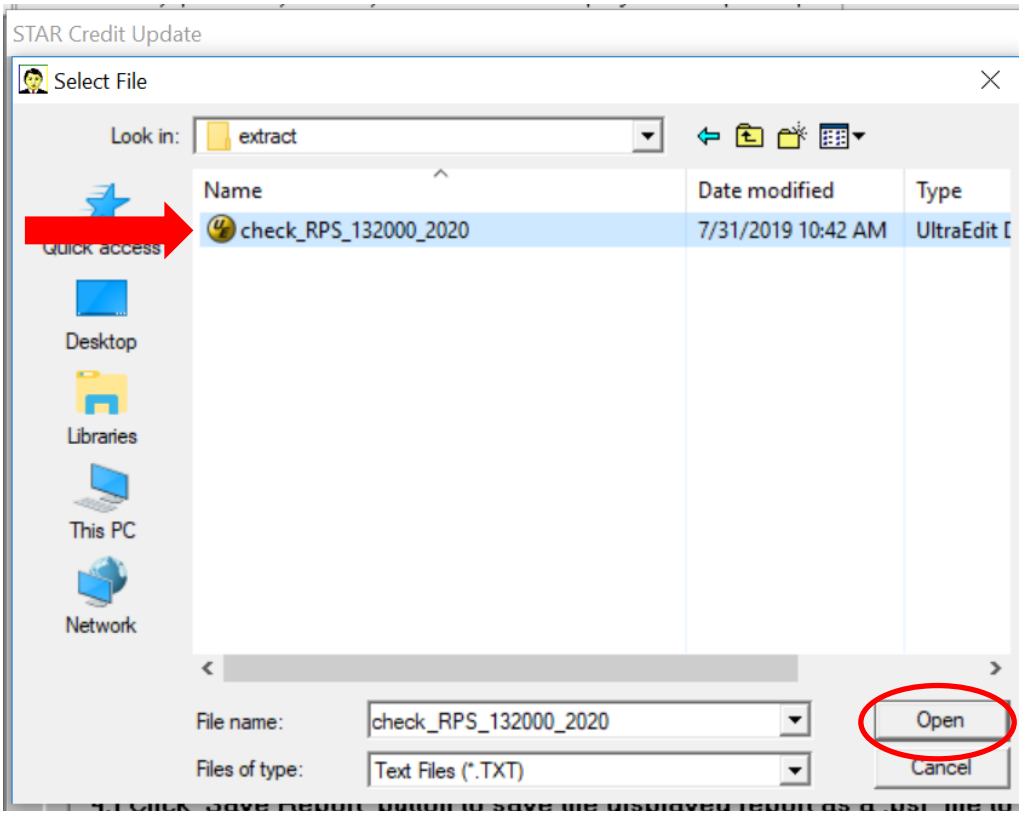
4. On the STA*R Management* screen, select *STAR Credit Update*. Enter the Roll Year used for levy and select *OK*. Select *Yes* to confirm or *No* to cancel your chosen levy year.



5. On the STAR Credit Update screen, select *Import NYSDTF File.*

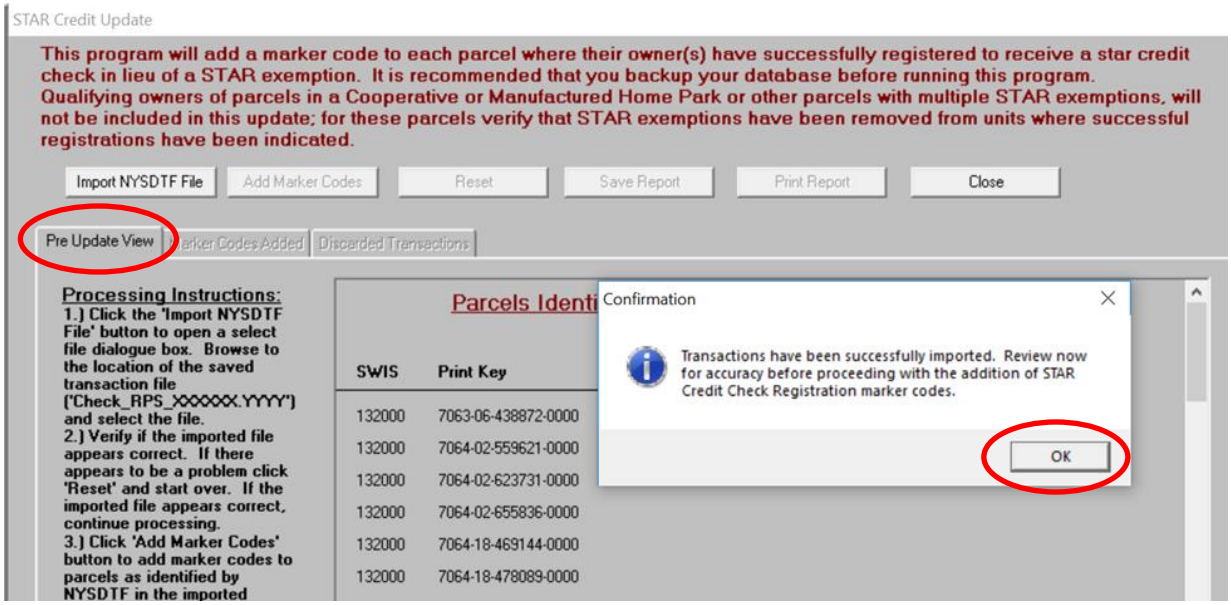


6. Browse to the location where you stored the previously downloaded file, click on the file and select *Open*.



After the file is imported, the contents of the file will appear on the *Pre Update View* screen. If there is more than one page, you must select *OK* to scroll through the list. Selecting *OK* ***does not*** update any data, and if necessary, you can select *Reset* to choose a different file or close out of the program without consequence. The number of parcels on the file is summarized at the end.

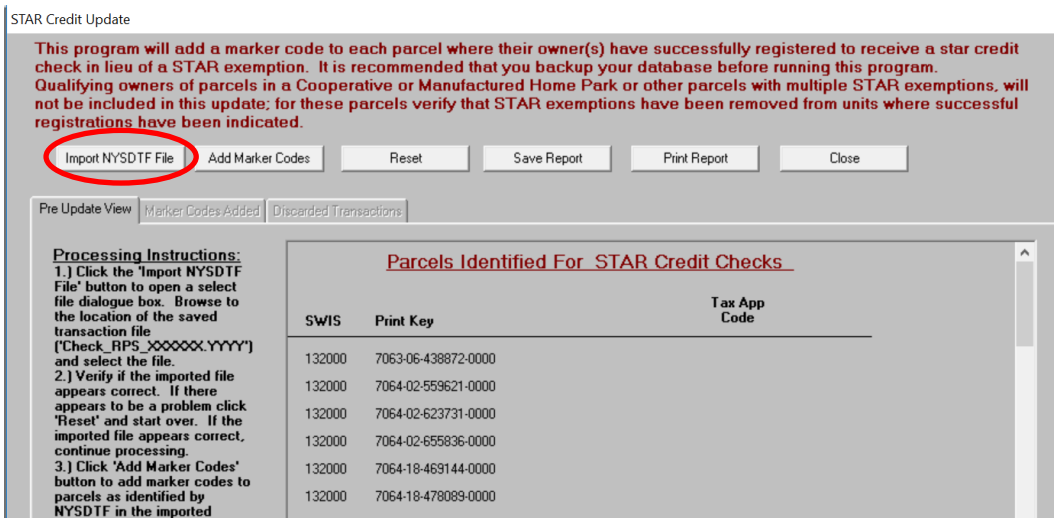
7. If the file appears appropriate*, select *OK*. You should print and/or save the report as a PSR file because it will no longer be available after you close the utility.



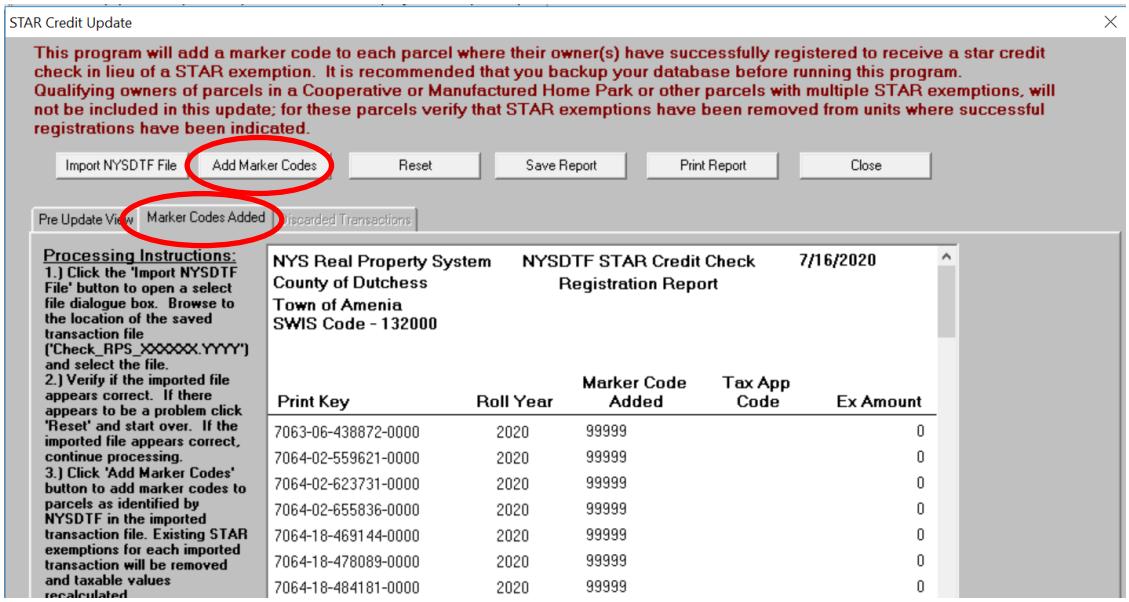
*If the file does not appear appropriate, "x" out of the confirmation message and go back to the *Import NYSDTF File* and select the correct file. If you continue to have an issue, contact your ORPTS Customer Service Liaison.

8. Select *Add Marker Codes* to update the database.

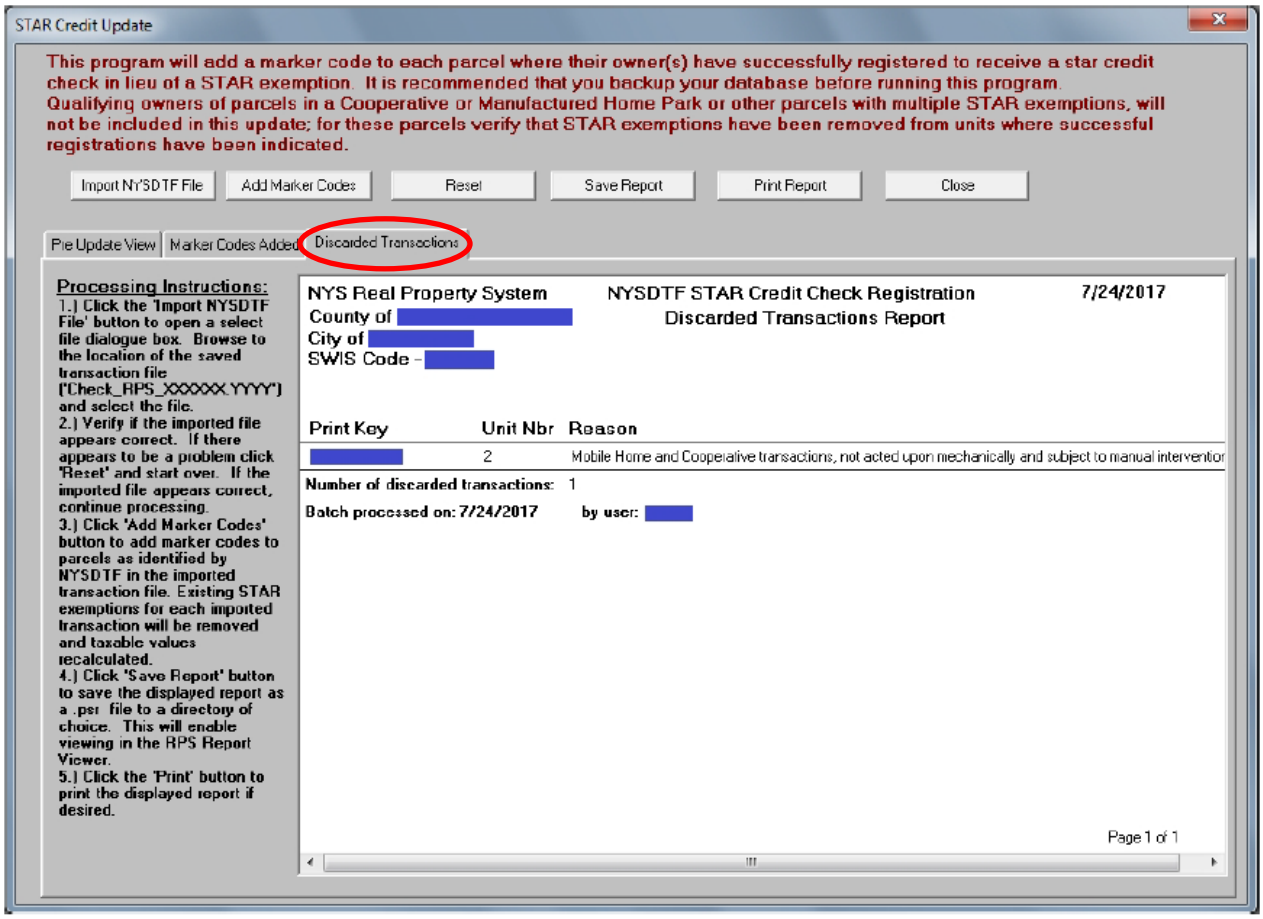
This update program will add marker codes to parcels listed on the transaction file for the selected Roll Year and will automatically run a recalculation of taxable values for all parcels in the municipality. The update program can take from five to thirty-five minutes depending on the size of the municipality.

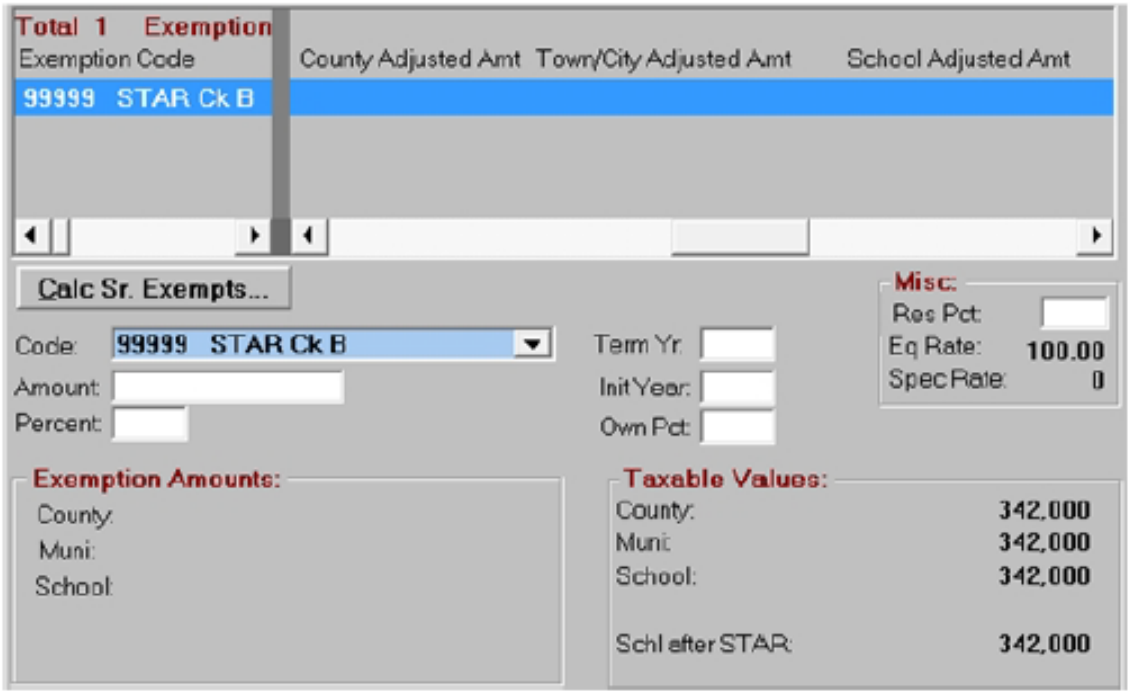


9. After processing is complete, a report of the marker codes added will display on the *Marker Codes Added* tab. You should print and/or save the report as a PSR file because it will no longer be available after you close the utility.



If a parcel listed on the imported transaction file is a cooperative building (owner code = ‘P’ or ‘Q’) or a Mobile Home Park (property class = 416), or has multiple STAR exemptions, no action will be taken and the parcel will be listed on the *Discarded Transactions Report*. These parcels should be reviewed and manually updated at the parcel level if appropriate. You should print and/or save the report as a PSR file because it will no longer be available after you close the utility. All three report tabs are accessible for comparison.



10. To process another file for a different municipality, select Reset, and choose the new file.

Example. The image below is a sample of a parcel where a marker code has been added. Note that the marker code has no value and the *Taxable Values for School and Schl after STAR* are equal.