Prepare Personal Update File for New Year (2023)

IMPORTANT: Before you begin, verify that you have a good backup with no errors from the previous night. If you do not have a good backup or are unsure how to check your backup, please call PUBLIQ at 800.235.0762.

Please read all the steps before you begin. If you anticipate needing assistance with the instructions, please call PUBLIQ as soon as possible. You may fax print screens and reports to 864.253.8692.

1. **In Real/Personal Update/Calculate, change the Real/Personal Tax Year to 23.**

If the tax year is already set to **23**, skip to step 2.

   i. From the Auditor - Current menu, select **Special Processing > Real/Personal Update/Calculate > File Maintenance > Special Processing > System Options**.

   ii. Change **Real/Personal Tax Year** to **23**.

   iii. Select **Save**.

2. **Generate year 2023 district records for editing purposes.**

This step may already be complete if adding 2023 aircraft, documented vessels, local furniture and fixtures, or others.

   i. From the Auditor's Office menu, select **Control Information > District File Maintenance > Generate District Records**.

- In the **Ranges** section, set the **From** column to **ALL.**

- To keep millages off these records, go to the **Options** section and select the **Zero Levy** box.

- Find **Generate Records For**. In the **Year** field, enter **23**. From the **Type** drop-down menu, select **Non-Vehicle**.

- Find **Based On**. In the **Year** field, enter **22**. From the **Type** drop-down menu, select **N**.

ii. Select **Save**. A list prints and shows the districts created.

3. **Change tax and levy years in the Update file from 22 to 23**.

   i. From Auditor (Current), go to **Special Processing > Real/Personal Update/Calculate > File Maintenance > Special Processing > Set Tax Year in Update File** to change tax and levy years.

   ii. Select **OK**.

   iii. A window displays *Process Complete*. Select **OK**.

4. **Run the Update File Total to use as verification.**

   i. From the Auditor's Office menu, select **Special Processing > Real/Personal Update/Calculate > Real/Personal Update Reports > Update File Totals**.

   ii. Select **OK**.

5. **Delete records and clear assessments in the 2023 Update File.**

Important: Don't clear or delete any property types you have updated for 2023 taxes.

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   i. From the Auditor's Office menu, select **Special Processing > Real/Personal Update/Calculate > File Maintenance > Special Processing > Delete/Clear Values in Update File**.

   - To keep all information on a particular type of property but zero out the assessment, select the box in the **Clear Assmt** column for the property type.

   - To flag all records for a property type for deletion, select the box in the **Delete** column for the property type.

     o Since you will receive new data for merchant, and manufacturer data, select the box in the **Delete** column for SCTAX Merchants and SCTAX Manufacturers.

   ii. Select an option to handle the other property types. Options include the following:

   a. Delete them and add the **2023** record manually.

   b. Delete them and add these types from the **2022** Year-End Tax File.

   c. Do not delete them but clear the assessments.

   d. Leave them exactly as they are and update them manually with new values.

6. Run the Update File Totals again.

This run should reflect the changes from the last step. See Step 4 for instructions on printing the Update File Totals.

7. Run the in-place purge on the Update File.

    i. From the Auditor's Office menu, select **Special Processing > Real/Personal Update/Calculate > File Maintenance > Purge Files in Place**.

    ii. Select the **Real/Personal Update** box.

    iii. Select **Continue**.

        The system rebuilds the Update File keys to start the purge. During this time, the system is locked.

    iv. When the purge is complete, a success message displays. Select **OK**.

8. Add other Personal records from the Prior Year File.

Complete this step if you deleted personal property records from the Update File and want to add them from the **2022** Year-End Tax file (Step 6). If you did not delete any of these records, skip this step.

    ii. From the Auditor's Office menu, select **Special Processing > Real/Personal Update/Calculate > Build Personal/DOR Update File > Add Boat Trailers, Personal, DOR From Prior Year Tax File**.

- To add a particular property type from the Tax File, select the box in the **Add to Update File** column for the appropriate property type.

- For any property types that you do not want to add, leave the box deselected in this column.

    iii. Select **Save** when finished.

This program locates any paid yet unrefunded or unpaid records of the types specified on last year's tax file.

Records are sorted alphabetically and added to the Update file for **2023**. The name, address, descriptive information, and district and town codes are copied to the Update file.

Since the assessment amounts are zero, you should manually post the new assessments on the records after this program finishes running. Print a list of each property type, then update the property with the new assessments.