

- STEPS:**
1. Update BS&A Software
 2. Update Physical Characteristics
 3. Write Float Values

- Freeze Assessors Changes
- Run L4023 and check ratios prior to sending information to Equalization.
- 2019 Workroll Packet (everything in blue) is due to Equalization by **February 8, 2019**. This is only the real property, personal property will be included in the information you provide after March BOR.

2019 WORKROLL PACKET

- Remember to “Write Float Values” and “Freeze Assessor Values” in your database prior to creating the Workroll Packet.

1. Packet received from Assessor should contain:

- L4023 (*Check beginning figures*)
- Possible Calculation Problems Report (*Make sure you have items check under “Report Options-Calculation Problems To Look For”*)
- Parent/Child Assessment Roll (*Check that report balances.*)
- Livingston County Split Report (*Check that report balances.*)
- Poverty Roll
- Veterans Roll
- 2019 Database Back-Up
- Miscellaneous Statistic/Totals Report (See below if they apply.)
 - Ad Valorem Only
 - Ad Valorem Minus Ren Zone
 - IFT Only
 - Land Bank Only
 - DNR Only
 - Ren Zone Only

2. Equalization will review the Work Roll Packet and contact the unit with any questions or concerns. If any changes are needed make them immediately and then run an “Assessment Roll” for only those changes. Include this roll in your MBOR Packet.

2019 MARCH BOARD OF REVIEW PACKET

- Remember to complete steps 1 thru 3 listed above and “Freeze MBOR VALUES” prior to creating any of the information below.
- It is recommended that an “Assessor Change Roll”, “MBOR Roll”, Poverty Roll and L4022 be given to the Equalization Department PRIOR to the MBOR Packet. These reports can then be reviewed and any necessary changes be made before the complete packet is created.

1. Packet received from Assessor should contain the following:

****PLEASE NOTE THAT THE ITEMS LISTED BELOW CAN BE SCANNED AND SENT VIA EMAIL OR PLACED ON THE EQUALIZATION “FTP” SITE UNLESS OTHERWISE STATED. ****

- **Complete Assessment Roll** (Real and Personal)- Exported to a “PDF” file and placed on the Equalization Department “FTP” Site.
- **L4037- PRE-March** Board of Review Certificate.
- **L4037-** Board of Review Certificate- Signed by the Board of Review Members.
- **March Board of Review Log**
- **L4021-** Exported to a file and placed on the County FTP Site.
- **L4021-** Sign last page only.
- **L4022-** Signed
- **L4023**
- **L4025-** Run for all Properties and Signed.
- **L4626- Assessing Officer’s Report of Taxable Values as of State Equalization.** (*Change in due date per 2019 STC Property Tax, Collections and Equalization Calendar-Bulletin No. 17 of 2017*)- Form must be emailed to Sue Bostwick (sbostwick@livgov.com).
- **2019 Database Back-Up-** Place on Equalization Department “FTP” Site.
- **Miscellaneous Statistic/Totals Report-** Hard Copy. (See below if they apply.)
 - Ad Valorem Only
 - Ad Valorem Minus Ren Zone
 - IFT Only
 - Land Bank Only
 - DNR Only
 - Ren Zone Only

EMPP (Eligible Manufacturing Personal Property and Essential Services Assessment)

Due by April 1, 2019- All unit’s EMPP L5278 and 5277 (rescission affidavit) exports need to be uploaded to the STC site via BS&A Software By April 1, 2019. Please notify Equalization when this has been accomplished. (*Per the 2019 STC Property Tax, Collections and Equalization Calendar- Bulletin No. 17 of 2017*)

NOTES

Prior to turning in your Work Roll Packet have you done the following:

- Have you updated with the latest BS&A update?*
- Miscellaneous Totals/Statistics and L4023 beginning figures MUST match last year’s ending figures.*
- All parent parcels have retired class codes.*
- Child parcels do not have any Equalization Adjustments on them.*
- Do not use any class codes other than the State Tax Commission Recommended Classification Codes.*
- Created a list for Equalization containing any potential problems or any new school transfer districts.*
- Full Poverties-** *No Equalization Adjustments on full Poverties.*
- Partial Poverties** *are brought back on as all “New” and “Additions” but may also have market EQ Adjustment.*
- No adjustments on Class Changes*