# Intermediate Pro*Val*Plus®

1/06/05- 1/07/05

Presented by

Tony Magnelli
&
Brett Hill

# Table of Contents

# 1.

# Neighborhood Development

**Neighborhood** - *"A collection of parcels, usually but not always contiguous, having similar characteristics and economic factors, and viewed as homogeneous for analysis and valuation"*. **All parcels require a neighborhood number.**

**Neighborhood Setup Example:**

The following is the schema used in assigning neighborhoods when we converted Boundary County. *This is only an example; you may find it necessary to choose a different process for neighborhood definition.*
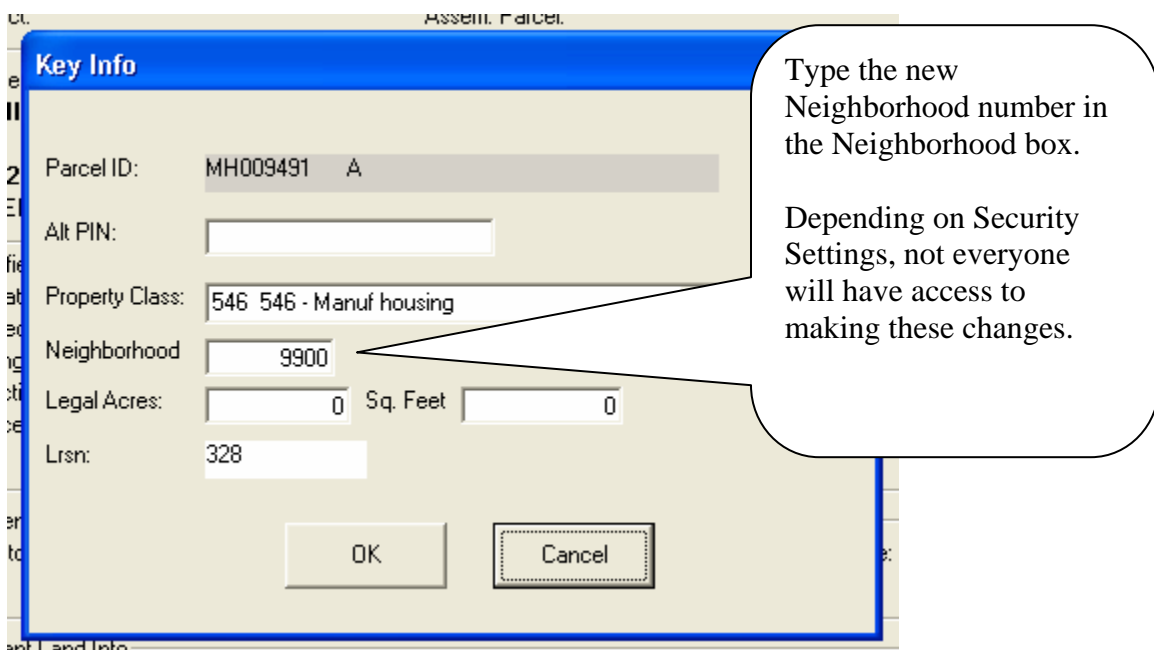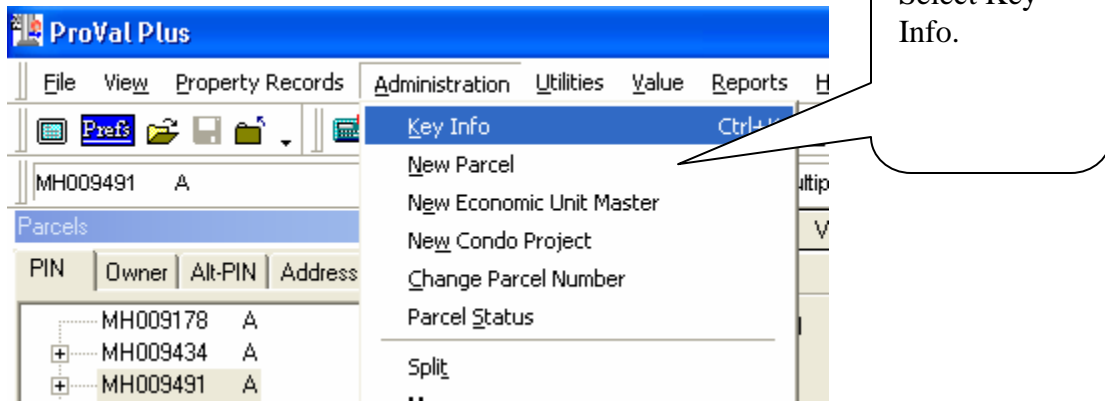
1. **If the third digit of the parcel number IS NOT a number & is a letter, the following will be used:**
   - **3$^{rd}$ digit = B, then the neighborhood will be *1100*  (Bonners Ferry)**
   - **3$^{rd}$ digit = M, then the neighborhood will be *1200*  (Moyie Springs)**

2. **If the third digit IS a number & the 5$^{th}$ digit is 'N' or 'S' & the 8$^{th}$ digit is 'E' or 'W', then the neighborhood will be *2200*, (Rural Farmland/Grazing).**

3. **If the third digit IS a number, BUT does not contain the "N','S', or 'E','W' in the 5$^{th}$ & 8$^{th}$ digit fields, then the neighborhood is *2100* (Rural Residential).**

4. **If none of the above is met, it will assign a neighborhood of *2100* (Rural Residential).**

**! TIP many Counties have found it to their advantage to create manufactured housing only neighborhoods.**
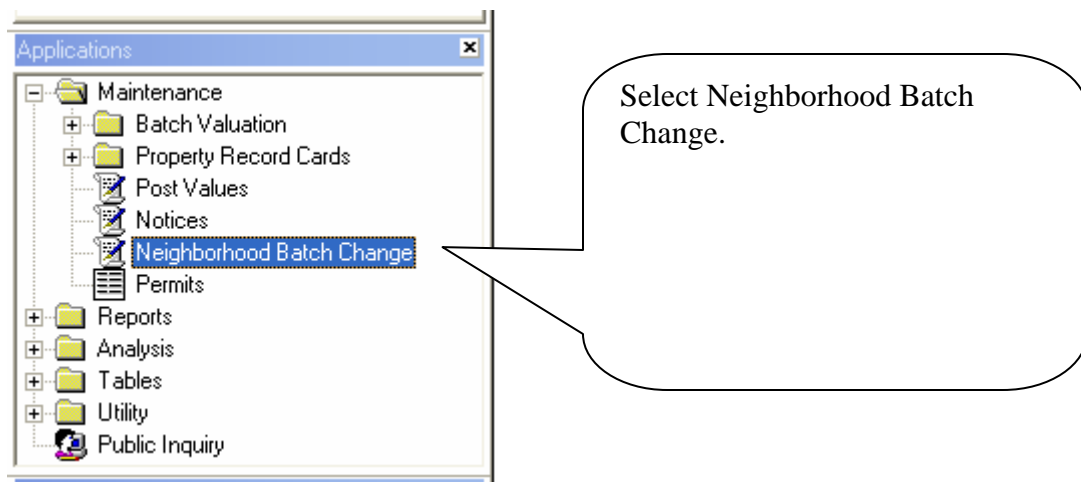
**! REMINDER Neighborhoods are not static; the market will dictate the need to add parcels, remove parcels or create new neighborhoods.  Expect the neighborhoods you set up today to change at some time in the future.**

**! REMINDER When creating a new neighborhood, be sure to create the General Control, Residential, Commercial and Land all at the same time.**

**CHANGING A PARCEL'S NEIGHBORHOOD**

> Select Key Info.

> Type the new Neighborhood number in the Neighborhood box.
>
> Depending on Security Settings, not everyone will have access to making these changes.

**Making a Batch Neighborhood change to multiple parcels.**

> Select Neighborhood Batch Change.

**As with all other Batch operations, you will get this familiar screen. You have several options, including the use of an input file.**



Batch Neighborhood Change Program

Area: 001

**Parcel Selection**
- ◉ All Parcels
- ○ Input File
- ○ Parcel Set [              ▼]

- ○ PIN
- ○ Owner
- ○ Address
- ○ Alternate PIN
- ○ Neighborhood

From: [                                    ]

To: [                                    ]

**Property Classes**
- ◉ All Property Classes
- ○ Range [    ] to [    ]

- ☐ Agricultural
- ☐ Mineral
- ☐ Industrial
- ☐ Commercial
- ☐ Residential
- ☐ Exempt
- ☐ Utility
- ☐ Other classes

**Taxing District**
- ◉ All Districts
- ○ District [******]

Select parcels to process.

**Statistics**

Parcel:

Count Selected:              Filtered:              Processed:

Start Time:              End Time:

Elapsed Time:

Avg. Parcel Time:              Parcels/Minute:

Est. Time Left:

[ OK ]    [ Quit ]    [ Selection Options... ]

**After entering your limits on the batch screen, you now are prompted to enter the NEW neighborhood number. Notice that with this tool you can also change the grade, condition or land type and method at this time.**



**Neighborhood Batch Change**

- ● New Neighborhood Number  344000
- ○ Change Grade Code        [ ] ▾  to  [ ] ▾
- ○ Change Condition         [ ] ▾  to  [ ] ▾
- ○ Change Land Type and Method
- ☑ Report Only

Apply Grade/Condition to
- ☐ Dwellings          ☐ Additions
- ☐ Attached Garages   ☐ Other Improvements
- ☐ Detached Garages   ☐ Commercial Improvements

Run it in report only and check the output file. If everything looks good, run it again and process the update.

Change Land Type and Method
from
Land Type [ ] ▾
Method [ ] ▾
to
Land Type [ ] ▾
Method [ ] ▾

OK    Cancel

# ProVal*Plus*
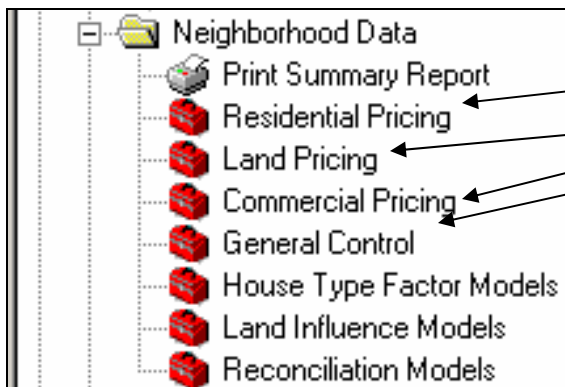# Neighborhood & Codes Tables Maintenance

**In this documentation, we are going to only deal with Neighborhood & Codes Table maintenance.**
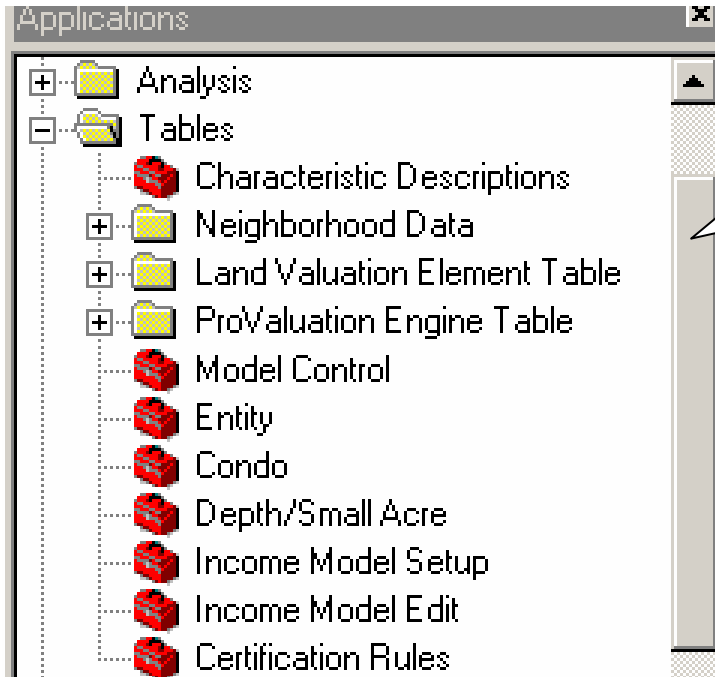


All Master Tables Maintenance is done from the "Applications" window listed to the left under the section titled "Tables".

## NEIGHBORHOOD Data:

*A neighborhood must reside in four different locations (tables).* General Control, Land Pricing, Residential Pricing, & Commercial Improvement.  When setting up a new neighborhood, you must set it up in each location.



Each Neighborhood number must reside in each of the following.

**If existing neighborhood, enter the neighborhood number then click 'Open'. If new, enter the number then click 'New'.**
**Next, if new, enter a description of the neighborhood under 'Name'.**
**The rest of the information on this screen is optional**

**These buttons will allow you to switch to one of the other tables.**

For example purposes, we are selecting to go to Land next.

You can enter values here that reflect on the neighborhood as a whole.  For example, if you have a special Land 'Model serial Number' for this neighborhood (one that is different from the county as a whole), then if you enter that number here, it will use it, rather than the master serial number. Another example is the 'Land Local Modifier'.  If a percentage modifier (ie: 105) is entered here, then 5% would be added to the land value for any land valued in this neighborhood.

**NOTE**: The other three screens are similar in nature to the one above.

**NOTE:** Use these overrides with caution.  When a parcel is valued, both land & improvements, the valuation program will check the parcel's neighborhood to see if any adjustments in value (either up or down) should be done.  If there is an entry in any of these fields, it will use that entry to add/subtract value.

**NOTE:**  Anytime you make a change, click 'Save' before selecting the next table.

End of Neighborhood Function

## Characteristics Descriptions:

This option will give you some insight into how to change & maintain some of the tables you will use in ProVal.  Most of these tables will be maintained through the following:
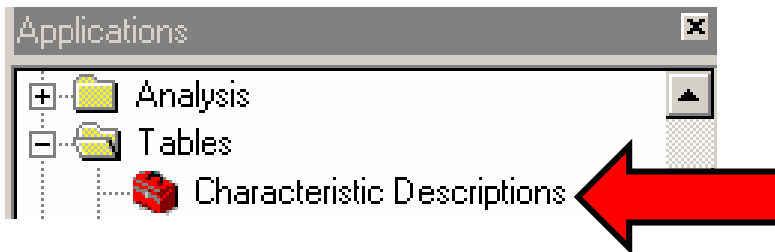


**This involves three different areas:**
- **Codes Tables (Characteristic Codes)**
- **Outbuildings**
- **Land Types**

**Characteristic Codes**

---

**ProValuation Report**

| | | |
|---|---|---|
| Outbuildings | Characteristic Codes | Land Types |

Table: Access to Property ▼

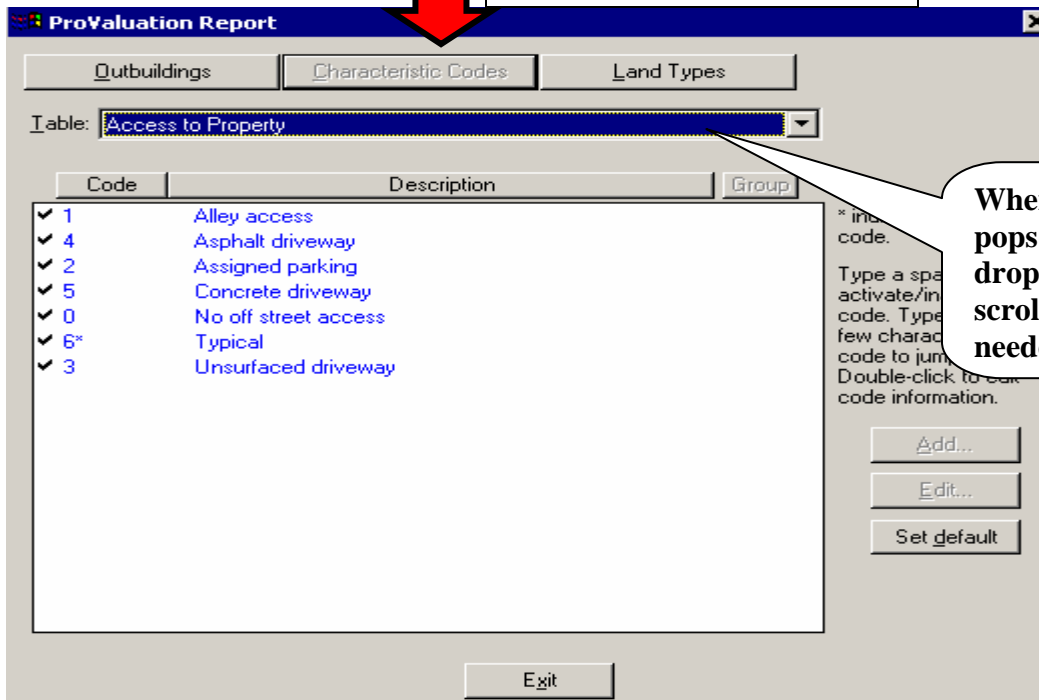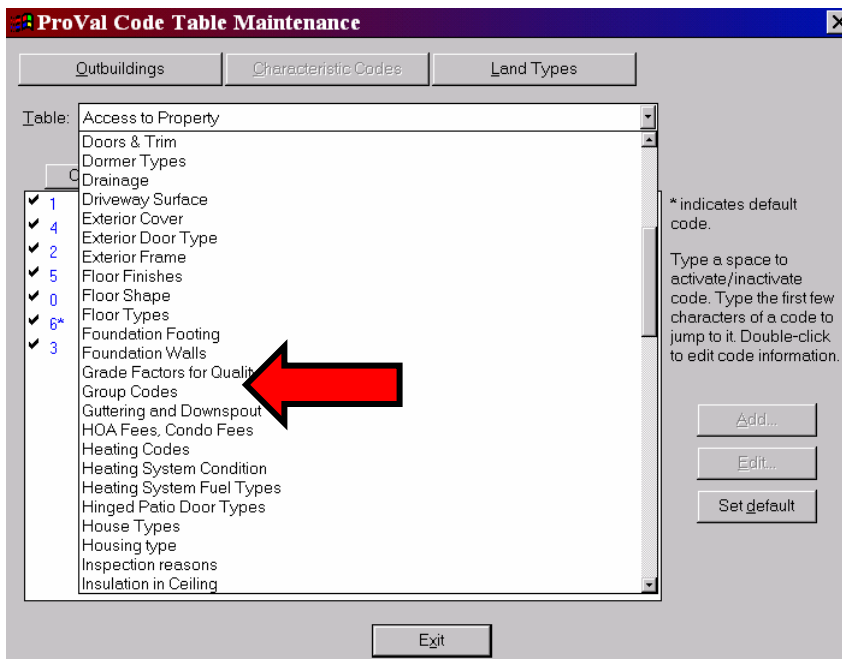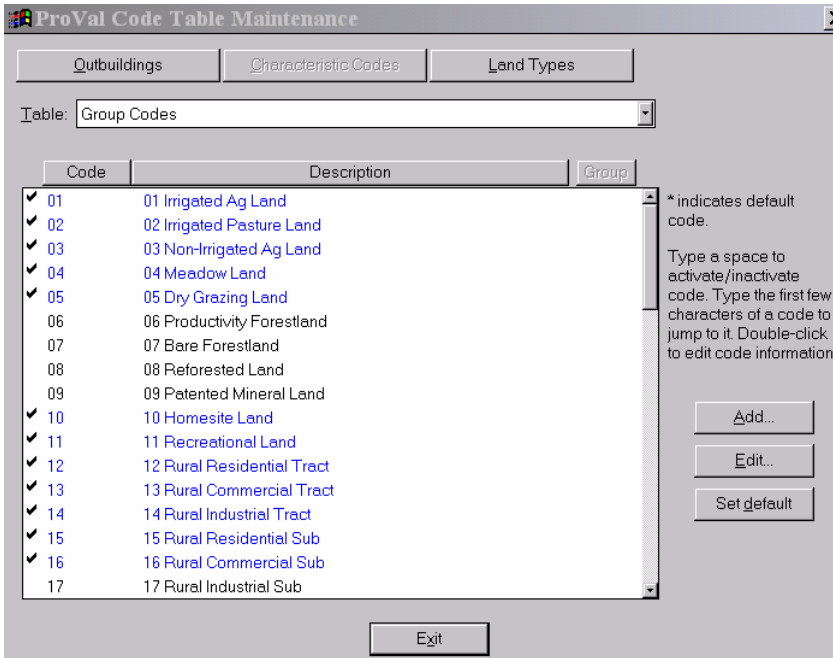| Code | Description | Group |
|---|---|---|
| ✔ 1 | Alley access | |
| ✔ 4 | Asphalt driveway | |
| ✔ 2 | Assigned parking | |
| ✔ 5 | Concrete driveway | |
| ✔ 0 | No off street access | |
| ✔ 6* | Typical | |
| ✔ 3 | Unsurfaced driveway | |

* indicates default code.

Type a space to activate/inactivate code. Type the first few characters of a code to jump to. Double-click to edit code information.

Add...
Edit...
Set default

Exit

**When this screen pops up, select the drop down arrow & scroll to the table needed.**

---

**For illustration purposes, we are going to select Group Codes (categories) table.**

---

**ProVal Code Table Maintenance**

| | | |
|---|---|---|
| Outbuildings | Characteristic Codes | Land Types |

Table: Access to Property ▼

Doors & Trim
Dormer Types
Drainage
Driveway Surface
Exterior Cover
Exterior Door Type
Exterior Frame
Floor Finishes
Floor Shape
Floor Types
Foundation Footing
Foundation Walls
Grade Factors for Quality
Group Codes
Guttering and Downspout
HOA Fees, Condo Fees
Heating Codes
Heating System Condition
Heating System Fuel Types
Hinged Patio Door Types
House Types
Housing type
Inspection reasons
Insulation in Ceiling

✔ 1
✔ 4
✔ 2
✔ 5
✔ 0
✔ 6*
✔ 3

* indicates default code.

Type a space to activate/inactivate code. Type the first few characters of a code to jump to it. Double-click to edit code information.

Add...
Edit...
Set default

Exit

**At this point, you can select the entry you need to change, and then click 'Edit'.**

**NOTE:** **Depending on the table, there are different levels of maintenance that can be done. Some tables you can add new entries, some you can only edit & some tables you cannot change in any way.**
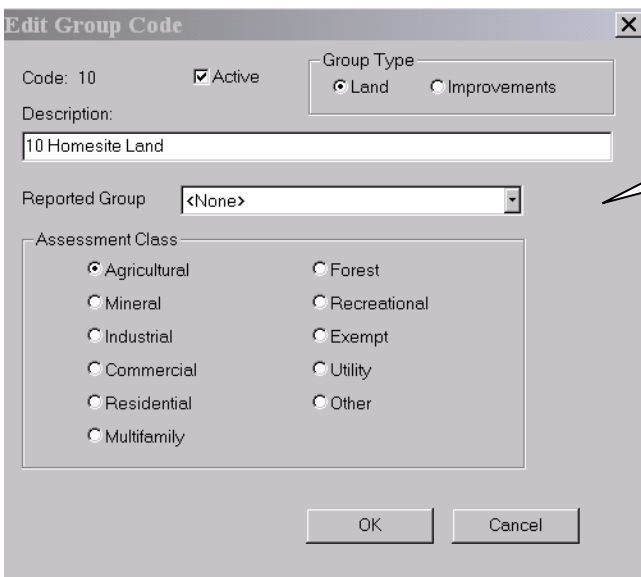


Example of internal screen once item 10 above was highlighted to 'Edit'.

## Outbuildings:
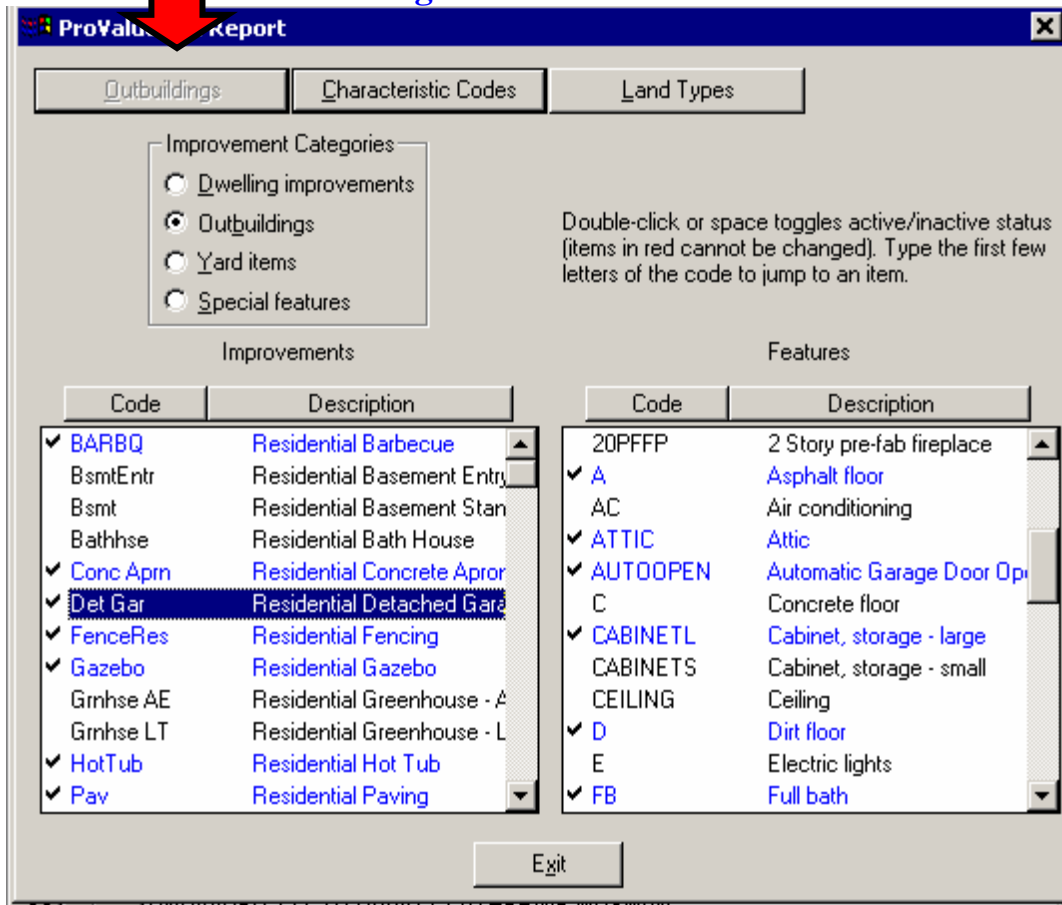


### As listed above, there are four different areas of outbuildings:
- **Dwelling Improvements**
- **Outbuildings**
- **Yard Items**
- **Special features**

**By double clicking on an entry within the Improvements Screen will turn the entry on (check mark on) or will turn it off (no check mark).**
**By single clicking an item, you will see it's features (if any) show up in the Features Screen. By double clicking a feature will also turn it off or on.**

**Caution: Before turning off any improvement or feature, you will want to have some kind of script or report ran against your data to be sure that it is currently not being used.**
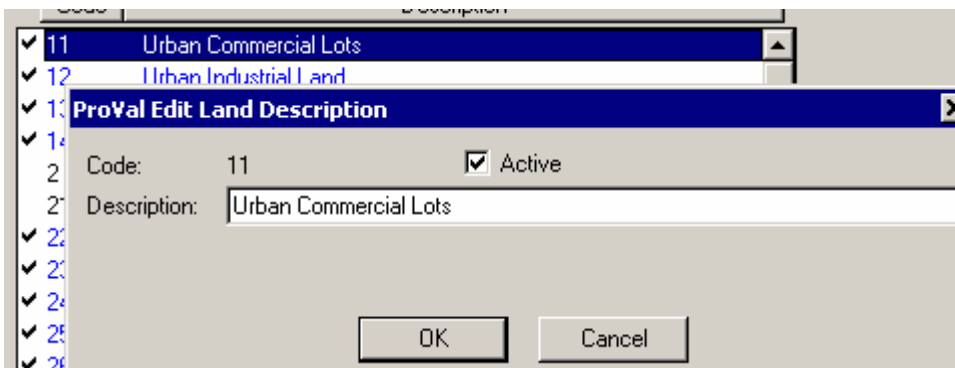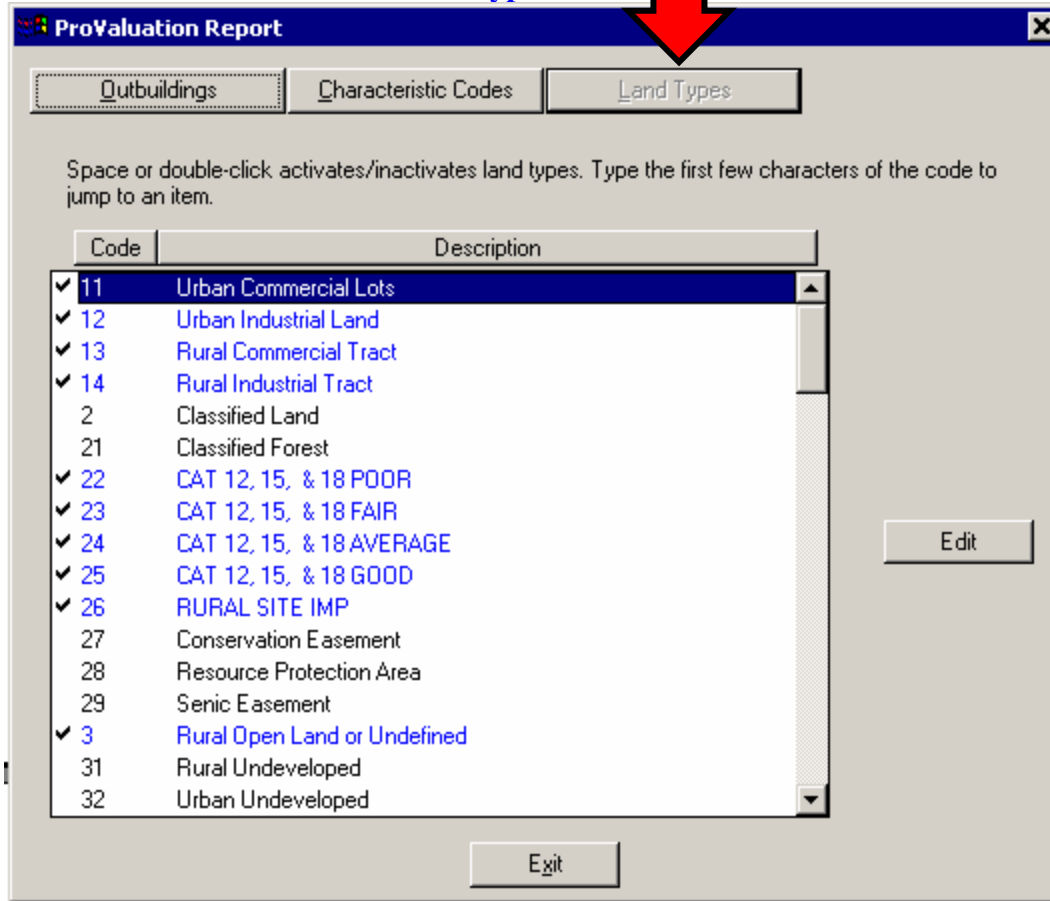
**Land Type codes can only be edited by changing the description of the land type. New codes cannot be added. But, there should be plenty of codes to use for all your different land types.**

## Land Valuation:



**Master land records are setup by neighborhood & contain the following:**
- **Model Number (year)**
- **Neighborhood**
- **Land Type**
- **Land method**



**Depending on the Method Type (per acre, per sq foot, site, etc), the above table may look different from one method to another. But, each master entry will contain a breakdown of the values that it takes to determine the value for that type.**

# A GUIDE
# TO
# LAND VALUATION
# IN

# PROVALUATION LAND ENGINE SCREEN DESCRIPTION

## Method 1

Use (0) to show this Method in all Neighborhoods.

70 + Assessment year = Model Number.
**Example: 702003**

Edit this description from the main screen
*TABLES/ CHARACTERISTIC DESCRIPTIONS / UPDATE/ LAND TYPES*

Model Number: 701999
Land Type: 11 Primary Commercial/Indust Land

Neighborhood Number: DEFAULT
Method: 1 Per Front Foot - Effective Frontage

Default Entry (Neigh = 0)

Comment:

Note: Effective Frontage is used when valuing irregular lots.

Type
○ Market
○ Use

Method Options
Use LessThan 1 Acre Factor?
○ Yes          ○ No

Range Methods Application Option
○ Buildup / Average    ○ Step / Flat

☑ Active

Copy

Paste

Use this Method for one rate per front foot only. The low rate and high rate illustrates the range in Market Value only! If a range of value is desired use Method 11 Per Effective Front Foot {by Effective Frontage FF range}

Value Definitions
Rate       0
Low Rate   0
High Rate  0

This button takes a carbon copy of all records from one model year to the next. Then simply make changes to those Neighborhoods that need it. Without entering values in neighborhoods that don't change from one model year to the next. (Thanks Darcy!)

Once a Land Type and Method is saved. Choose Copy, then enter a new neighborhood and select paste. Walla!! Your land labors are miraculously transformed to another neighborhood.

Create New Model from Existing Model

Save

Cancel

Select

Exit

NEW RECORD

To delete a land type and Method in a neighborhood. Simply uncheck the active box then save. You will be prompted with a nasty, "The record you have just saved is INACTIVE!", use all your strength and click OK! Push Select again and a Delete box will appear in the corner just left of the save button. Push it and the INACTIVE record will go away.

## Method 2

| Field | Value |
|---|---|
| Model Number: | 701999 |
| Neighborhood Number: | DEFAULT |

Land Type: 11 Primary Commercial/Indust Land

Method: 2 Site Value (lump sum amount)

Default Entry (Neigh = 0)

Comment:

**Type**
- ○ Market
- ○ Use

☑ Active

**Method Options**
Use LessThan 1 Acre Factor?
- ○ Yes
- ○ No

Range Methods Application Option
- ○ Buildup / Increase    ○ Step / Flat

Copy

Paste

**Value Definitions**

| | |
|---|---|
| Value | 0 |
| Low Value | 0 |
| High Value | 0 |

Save    Cancel

Select    Exit

NEW RECORD

Single value lump sum. No variables here folks.

This is a straight site value. The low and high rates are shown to illustrate the market only. (Indiana users)

# Method 3

| | | | |
|---|---|---|---|
| Model Number: | 701999 | Land Type: | 11  Primary Commercial/Indust Land |
| Neighborhood Number: | DEFAULT | Method: | 3  Per Acre |

Default Entry (Neigh = 0)

Comment:

**Type**
- ○ Market
- ○ Use

☑ Active

**Method Options**

Use LessThan 1 Acre Factor?
- ● Yes
- ○ No

Range Methods Application Option
- ○ Buildup / Average
- ○ Step / Flat

Copy

Paste

**Value Definitions**

| | |
|---|---|
| Rate | 0 |
| Low Rate | 0 |
| High Rate | 0 |

This is a straight value per acre. The low and high rates are shown to illustrate the market only. (Indiana users)

Save    Cancel

Select    Exit

NEW RECORD

# Method 4

| | | |
|---|---|---|
| Model Number: | 701999 | Land Type: | 11 Primary Commercial/Indust Land |
| Neighborhood Number: | 10016 | Method: | 4 Per Square Foot |

Comment: [                    ]

**Type**
- ○ Market
- ○ Use

☑ Active

**Method Options**

Use LessThan 1 Acre Factor?
- ○ Yes
- ○ No

Range Methods Application Option
- ○ Buildup / Average
- ○ Step / Flat

[ Copy ]

[ Paste ]

**Value Definitions**

| Rate | 0.00 |
|---|---|
| Low Rate | 0.00 |
| High Rate | 0.00 |

Again just a straight rate per square foot. Make sure you have square footage filled in within your parcel.

[ Save ]   [ Cancel ]

[ Select ]   [ Exit ]

NEW RECORD

5

# Method 5

Model Number: 701998  Land Type: 11  Primary Commercial/Indust Land

Neighborhood Number: 10011  Method: 5  Per Front Foot - Actual Frontage

Comment:

**Type**
- ○ Market
- ○ Use
- ☑ Active

**Method Options**
Use LessThan 1 Acre Factor?
- ○ Yes      ○ No

Range Methods Application Option
- ○ Buildup / Average      ○ Step / Flat

Copy

Paste

**Value Definitions**
| Rate | 0 |
| Low Rate | 0 |
| High Rate | 0 |

Use this method when all of the lots in a neighborhood are rectangular. If there are Irregular lots in the Neighborhood Method #1 or #11.

Save    Cancel

Select    Exit

NEW RECORD

# Method 6

Model Number: 701998    Land Type: 11  Primary Commercial/Indust Land

Neighborhood Number: 10011    Method: 6  Per Lot (lump sum value per lot)

Comment:

**Type**
- ◉ Market
- ○ Use

☑ Active

**Method Options**

Use LessThan 1 Acre Factor?
- ○ Yes
- ○ No

Range Methods Application Option
- ○ Buildup / Average
- ○ Step / Flat

Copy

Paste

**Value Definitions**
- Value/Lot: 0
- Low Value: 0
- High Value: 0

Use this method when all lots in a neighborhood are the same size and value.

Save    Cancel

Select    Exit

NEW RECORD

---

**Land Sizes and Site Definition**

Actual Frontage: 100.00    Acres: 1.2900

Effective Frontage: 100    Soil ID: (None)

Effective Depth: 150    Site Rating:

Distance to rear lot:    <Default>

Square Feet:

Units: 1

Requires a value in units within the land base screen

# Method 7



ProValuation Land Engine

| Model Number: | 701999 | Land Type: | 11 Primary Commercial/Indust Land |
| Neighborhood Number: | 1 | Method: | 7 Per Lot (by square foot range) |

Comment:

The example below illustrates how the Range Method Application Option can be used with this Method.

**Type**
- ○ Market
- ○ Use

☑ Active

**Method Options**
Use LessThan 1 Acre Factor?
- ○ Yes

Range Methods Application Option
- ○ Buildup / Average
- ● Step / Flat

Paste

**Value Definitions**

| | | | | | |
|---|---|---|---|---|---|
| >= Sq Ft #1 | 0 | Value/Lot #4 | | >= Sq Ft #8 | |
| Value/Lot #1 | 19000 | >= Sq Ft #5 | | Value/Lot #8 | |
| >= Sq Ft #2 | 9000 | Value/Lot #5 | | >= Sq Ft #9 | |
| Value/Lot #2 | 20000 | >= Sq Ft #6 | | Value/Lot #9 | |
| >= Sq Ft #3 | 10000 | Value/Lot #6 | | >= Sq Ft #10 | |
| Value/Lot #3 | 21000 | >= Sq Ft #7 | | Value/Lot #10 | |
| >= Sq Ft #4 | | Value/Lot #7 | | Forward | |

Save    Cancel

Select    Exit

08/16/1999

**EXAMPLE USING STEP / FLAT METHOD**

| Lot Size Per Square Foot | Lot Value |
|---|---|
| 9000 | $19,000 |
| 9001 | $20,000 |
| 9900 | $20,000 |
| 10001 | $21,000 |

**EXAMPLE USING BUILDUP / AVERAGE METHOD**

| Lot Size Per Square Foot | Lot Value |
|---|---|
| 9000 | $19,000 |
| 9001 | $19,000 |
| 9900 | $19,090 |
| 10001 | $19,100 |

**Land Sizes and Site Definition**

| | | | |
|---|---|---|---|
| Actual Frontage: | 100.00 | Acres: | 1.2900 |
| Effective Frontage: | 100 | Soil ID: | (None) |
| Effective Depth: | 150 | | |
| Distance to rear lot: | | Site Rating: | <Default> |
| Square Feet: | | | |
| Units: | 1 | | |

Requires a value in units within the land base screen

# Method 8



| FRONT FEET | BUILTUP AVERAGE | STEP FLAT |
|---|---|---|
| 0 to 49 | $ 15,000 | $ 15,000 |
| 50 | $ 15,000 | $ 17,500 |
| 53 | $ 15,140 | $ 17,500 |
| 100 | $ 16,250 | $ 20,000 |

# Method 9

| Field | Value |
|---|---|
| Model Number: | 701998 |
| Neighborhood Number: | 10011 |

Land Type: 11 Primary Commercial/Indust Land

Method: 9 Per Square Foot (by size range)

Comment:

**Type**
- Market
- Use

☑ Active

**Method Options**

Use LessThan 1 Acre Factor?
- Yes
- No

Range Methods Application Option
- Buildup / Average
- Step / Flat

Be careful using Step/Flat option. You could have value inequities on parcels that overlap your price changes. Using the example below; a 4999 square foot would be valued at .26 per square foot or $1,300 and a 5002 square foot lot would be valued at .23 per square foot or $1,150. If the Builtup/ Average option is selected the same example would average the break points.

**Value Definitions**

| | | | | | |
|---|---|---|---|---|---|
| >= Sq Ft #1 | 0 | Rate #4 | | | |
| Rate #1 | 0.00 | >= Sq Ft #5 | | | |
| >= Sq Ft #2 | | Rate #5 | | | |
| Rate #2 | | >= Sq Ft #6 | | Rate #9 | |
| >= Sq Ft #3 | | Rate #6 | | >= Sq Ft #10 | |
| Rate #3 | | >= Sq Ft #7 | | Rate #10 | |
| >= Sq Ft #4 | | Rate #7 | | Forward | |

Save    Cancel

Select    Exit

Click here to expand your tables

| Square Foot range | Value Per Square Foot | | |
|---|---|---|---|
| 0 to 5000 | $ 0.26 | 4999 | $ 1,300 |
| 5001 to 8000 | $ 0.23 | 5002 | $ 1,150 |
| 8001 and up | $ 0.20 | | |

# Method 9

Model Number: `701998`  Land Type: `11  Primary Commercial/Indust Land`

Neighborhood Number: `10011`  Method: `10  Per Square Foot (by frontage range)`

Comment: ` `

**Type**
- ○ Market
- ○ Use

☑ Active

**Method Options**

Use LessThan 1 Acre Factor?
- ○ Yes
- ○ No

Range Methods Application Option
- ● Buildup / Average
- ○ Step / Flat

Copy

Paste

**Value Definitions**

| | | | | | |
|---|---|---|---|---|---|
| >= Front #1 | `0` | Rate #4 | | >= Front #8 | |
| Rate #1 | `0.00` | >= Front #5 | | Rate #8 | |
| >= Front #2 | | Rate #5 | | >= Front #9 | |
| Rate #2 | | >= Front #6 | | Rate #9 | |
| >= Front #3 | | Rate #6 | | >= Front #10 | |
| Rate #3 | | >= Front #7 | | Rate #10 | |
| >= Front #4 | | Rate #7 | | | |

Forward

Save    Cancel    NEW RECORD

Select    Exit

SAME AS METHOD 9 USING FRONTAGE RANGE INSTEAD OF SIZE

## Method 11

| | | | |
|---|---|---|---|
| Model Number: | 701998 | Land Type: | 11 Primary Commercial/Indust Land |
| Neighborhood Number: | 10011 | Method: | 11 Per Effective Front Foot (by Eff. FF range) |
| | | Comment: | |

**Type**
- ○ Market
- ○ Use

☑ Active

**Method Options**

Use LessThan 1 Acre Factor?
- ○ Yes
- ○ No

Range Methods Application Option
- ● Buildup / Average
- ○ Step / Flat

Be certain that all parcels in this neighborhood have a size in the effective frontage field.

Paste

**Value Definitions**

| | | | | | |
|---|---|---|---|---|---|
| >= Front #1 | 0 | Rate #4 | | >= Front #8 | |
| Rate #1 | 0 | >= Front #5 | | Rate #8 | |
| >= Front #2 | | Rate #5 | | >= Front #9 | |
| Rate #2 | | >= Front #6 | | Rate #9 | |
| >= Front #3 | | Rate #6 | | >= Front #10 | |
| Rate #3 | | >= Front #7 | | Rate #10 | |
| >= Front #4 | | Rate #7 | | | Forward |

Save   Cancel

Select   Exit

NEW RECORD

## Method 12

| Field | Value |
|---|---|
| Model Number: | 701998 |
| Neighborhood Number: | 10011 |
| Land Type: | 11  Primary Commercial/Indust Land |
| Method: | 12  Per Actual Front Foot (by Actual FF range) |

Comment:

**Type**
- ○ Market
- ○ Use

☑ Active

**Method Options**

Use LessThan 1 Acre Factor?
- ○ Yes     ○ No

Range Methods Application Option
- ⦿ Buildup / Average     ○ Step / Flat

[Copy]
[Paste]

**Value Definitions**

| | | | | | |
|---|---|---|---|---|---|
| >= Front #1 | 0 | Rate #4 | | >= Front #8 | |
| Rate #1 | 0 | >= Front #5 | | Rate #8 | |
| >= Front #2 | | Rate #5 | | >= Front #9 | |
| Rate #2 | | >= Front #6 | | Rate #9 | |
| >= Front #3 | | Rate #6 | | >= Front #10 | |
| Rate #3 | | >= Front #7 | | Rate #10 | |
| >= Front #4 | | Rate #7 | | [Forward] | |

[Save]     [Cancel]     NEW RECORD
[Select]     [Exit]

SAME AS METHOD 11 EXEPT VALUES KEY FROM ACTUAL FF FIELD NOT EFFECTIVE.

## Method 14

**Model Number:** 701998    **Land Type:** 11 Primary Commercial/Indust Land

**Neighborhood Number:** 10011    **Method:** 14 Per Acre (by size range)

**Comment:**

**Type**
- ○ Market
- ○ Use

☑ Active

**Method Options**

Use LessThan 1 Acre Factor?
- ● Yes
- ○ No

Range Methods Application Option
- ● Buildup / Average
- ○ Step / Flat

Copy

Paste

**Value Definitions**

| >= Acreage #1 | 0.00 | Rate #4 | | >= Acreage #8 | |
| Rate #1 | 0 | >= Acreage #5 | | Rate #8 | |
| >= Acreage #2 | | Rate #5 | | >= Acreage #9 | |
| Rate #2 | | >= Acreage #6 | | Rate #9 | |
| >= Acreage #3 | | Rate #6 | | >= Acreage #10 | |
| Rate #3 | | >= Acreage #7 | | Rate #10 | |
| >= Acreage #4 | | Rate #7 | | Forward | |

Save    Cancel

Select    Exit    NEW RECORD

**Method 15**

Model Number: 701998    Land Type: 11 Primary Commercial/Indust Land
Neighborhood Number: 10011    Method: 15 Per Acre (by soil type)

Comment: 

**Type**
- ○ Market
- ○ Use

☑ Active

**Method Options**
Use LessThan 1 Acre Factor?
- ● Yes
- ○ No

Range Methods Application Option
- ○ Buildup / Average
- ○ Step / Flat

Copy

Paste

**Value Definitions**
Table #: 0

Step #1 Put review year here (2000).

Save    Cancel

Select    Exit

NEW RECORD

---

Tables   Analysis   Inquiry   Reports   Utility

- Characteristic Descriptions ▶
- Neighborhood Data ▶
- Land Valuation Element Table ▶
- ProValuation Engine Table ▶
- Model Control Table ▶
- Entity Table ▶

Print
Update Soil Table
Update Main Table

Step #2 Go here

---

**PV ProValuation Land Engine Soil Table Update**

Soil-ID: TABL$    Description: Table Identifier Number

Class Number: 0    User text: 

| | Value, Rate or Factor | Table ID Number | Base Rate |
|---|---|---|---|
| 1 | 2000.00000 | 2000 | |
| 2 | | | |

Step #3: Save this Soil ID (it serves as a review year) The Table ID must match the Table # in step 1. Create a new table each year to update the Soil ID's value.

---

**ProValuation Land Engine Soil Table Update**

Soil-ID: 1CV1    Description: 

Class Number: 0    User text: 

| | Value, Rate or Factor | Table ID Number | Base Rate |
|---|---|---|---|
| 1 | 300.00000 | 2000 | |
| 2 | | | |
| 3 | | | |
| 4 | | | |
| 5 | | | |
| 6 | | | |
| 7 | | | |
| 8 | | | |
| 9 | | | |

Use a single value per Soil-ID per acre in field #1. You can only have One value per Soil-ID.

Use this to remind you what the Soil-ID means.

Step #5: Create your own Soil-ID using no more than 5 Characters (numbers or letters)

Step #4: Click this.

Save    Add a Soil-ID    Copy a Table

Cancel    Delete a Soil-ID    Quit

---

**Land Detail - Land Market Information**

Neighborhood 1

Land type: 41 Tillable Flooded Occasionally
Group: 01 Irr Ag
Method: 15 Per Acre (by soil type)

**Land Sizes and Site Definition**

Use Info

New Use

Actual Frontage:    Acres: 2.0000
Effective Frontage:    Soil ID: 1CV1
Effective Depth:    Site Rating
Distance to rear lot:    Very Good
Square Feet: 
Units: 

Step #6: Select the Soil ID within the parcel.

Done

Next >>

Price

Cancel

## Methods 16, 17, 27

| | | |
|---|---|---|
| Model Number: | 701998 | Land Type: 11 Primary Commercial/Indust Land |
| Neighborhood Number: | 10011 | Method: 16 Per Acre (base x soil productivity factor) |

Comment:

**Type**
- ○ Market
- ○ Use

☑ Active

**Method Options**
Use LessThan 1 Acre Factor?
- ● Yes
- ○ No

Range Methods Application Option
- ○ Buildup / Average
- ○ Step / Flat

Copy

Paste

**Value Definitions**
Table #  0

Save    Cancel

Select    Exit

NEW RECORD

SIMILAR TO METHOD 15 EXEPT YOU ONLY HAVE 10 VALUES BY SOIL TYPE
(USED IN STATES OTHER THAN IDAHO)

## Method 18
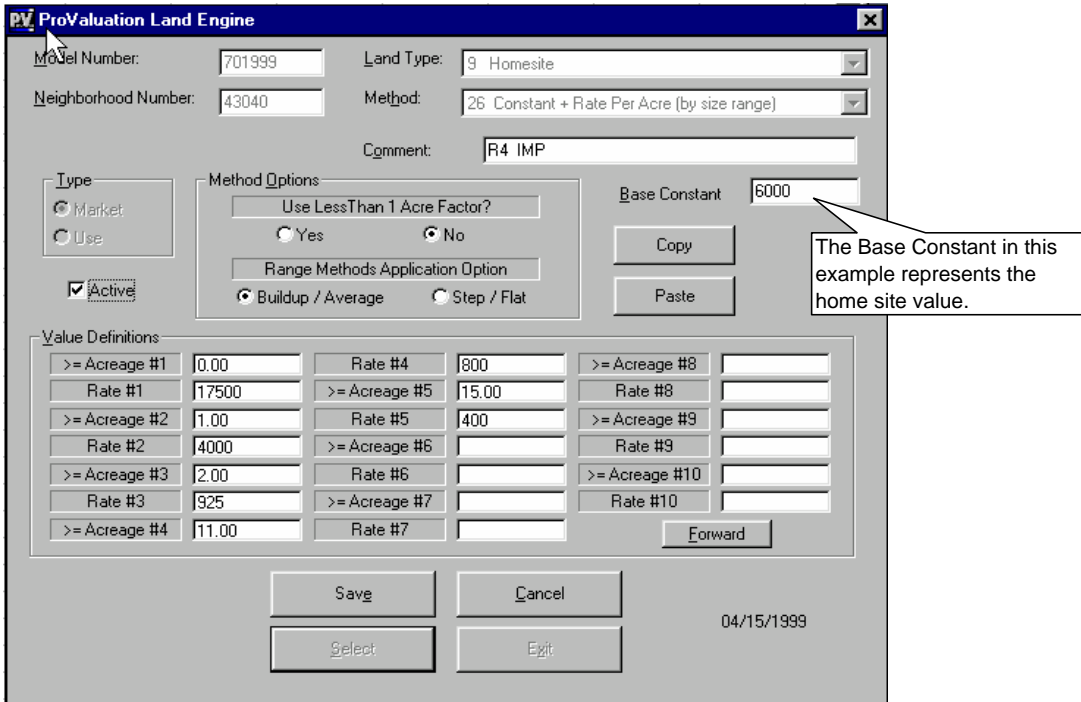


SINGLE VALUE PER IMPROVEMENT UNIT



Requires a value in units within the land base screen

## Methods 19 through 26



ProValuation Land Engine
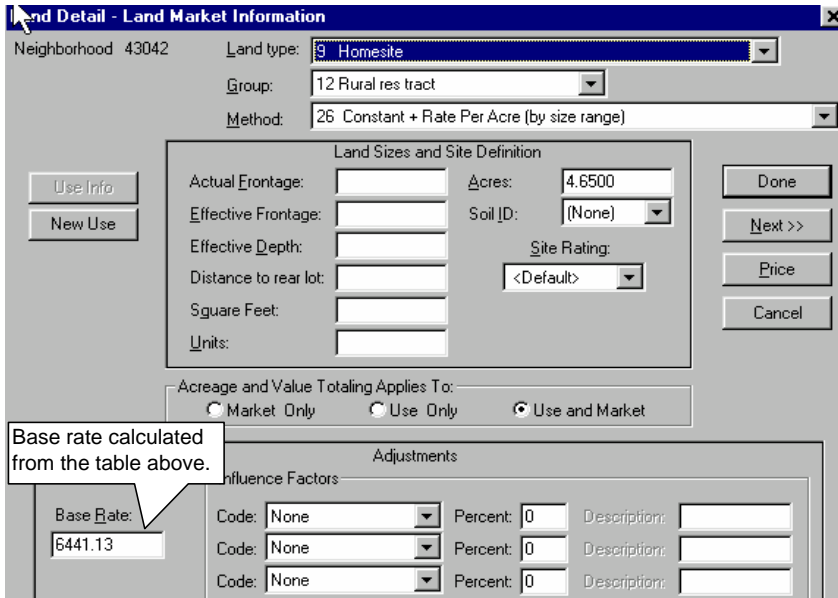
| | | | |
|---|---|---|---|
| Model Number: | 701999 | Land Type: | 9 Homesite |
| Neighborhood Number: | 43040 | Method: | 26 Constant + Rate Per Acre (by size range) |

Comment: R4 IMP

**Type**
- Market
- Use

☑ Active

**Method Options**
Use LessThan 1 Acre Factor?
- Yes
- ● No

Range Methods Application Option
- ● Buildup / Average
- Step / Flat

Base Constant 6000

Copy

Paste

The Base Constant in this example represents the home site value.

**Value Definitions**

| | | | | | |
|---|---|---|---|---|---|
| >= Acreage #1 | 0.00 | Rate #4 | 800 | >= Acreage #8 | |
| Rate #1 | 17500 | >= Acreage #5 | 15.00 | Rate #8 | |
| >= Acreage #2 | 1.00 | Rate #5 | 400 | >= Acreage #9 | |
| Rate #2 | 4000 | >= Acreage #6 | | Rate #9 | |
| >= Acreage #3 | 2.00 | Rate #6 | | >= Acreage #10 | |
| Rate #3 | 925 | >= Acreage #7 | | Rate #10 | |
| >= Acreage #4 | 11.00 | Rate #7 | | | Forward |

Save    Cancel

Select    Exit

04/15/1999



Land Detail - Land Market Information

Neighborhood 43042

| | |
|---|---|
| Land type: | 9 Homesite |
| Group: | 12 Rural res tract |
| Method: | 26 Constant + Rate Per Acre (by size range) |

**Land Sizes and Site Definition**

Use Info
New Use

| | | | |
|---|---|---|---|
| Actual Frontage: | | Acres: | 4.6500 |
| Effective Frontage: | | Soil ID: | (None) |
| Effective Depth: | | Site Rating: | <Default> |
| Distance to rear lot: | | | |
| Square Feet: | | | |
| Units: | | | |

Done
Next >>
Price
Cancel

**Acreage and Value Totaling Applies To:**
- Market Only
- Use Only
- ● Use and Market

Base rate calculated from the table above.

**Adjustments**

Influence Factors

Base Rate:
6441.13

| | | | | | |
|---|---|---|---|---|---|
| Code: | None | Percent: | 0 | Description: | |
| Code: | None | Percent: | 0 | Description: | |
| Code: | None | Percent: | 0 | Description: | |

**METHODS 19 THROUGH 26**
Are the same as Methods 1 through 7 with the exception of the BASE CONSTANT.
The value entered into the Base CONSTANT field will be applied to the land detail record regardless of any information entered into the VALUE DEFINITIONS section (see top figure).
During the valuation of a land detail records using a method in this group, value information calculated from the data entered in the VALUE DEFINITIONS section id ADDED to the BASE CONSTANT lump sum amount to arrive at a final value.

18

## Method 29 Square foot

**Model Number:** 701998  **Land Type:** 11 Primary Commercial/Indust Land

**Neighborhood Number:** 10011  **Method:** 29 Per Square Foot (breakpoint / rate with interpolatio

**Comment:**

**Type**
- ○ Market
- ○ Use

☑ Active

**Method Options**

Use LessThan 1 Acre Factor?
- ○ Yes   ○ No

Range Methods Application Option
- ○ Buildup / Average   ○ Step / Flat

[Copy] [Paste]

**Value Definitions**

| | | | | | |
|---|---|---|---|---|---|
| At Sq Ft #1 | 0 | Rate #4 | | At Sq Ft #8 | |
| Rate #1 | 0.00 | At Sq Ft #5 | | Rate #8 | |
| At Sq Ft #2 | | Rate #5 | | At Sq Ft #9 | |
| Rate #2 | | At Sq Ft #6 | | Rate #9 | |
| At Sq Ft #3 | | Rate #6 | | At Sq Ft #10 | |
| Rate #3 | | At Sq Ft #7 | | Rate #10 | |
| At Sq Ft #4 | | Rate #7 | | [Forward] | |

[Save] [Cancel] [Select] [Exit]   NEW RECORD

## Method 30 Per Acre

Use a value per Acre or Sq. Foot to a specified point. Then it will interpolate between the breakpoints smoothing out the rates. Thereby eliminating lesser values on larger pieces of ground.

**EXAMPLE**

| SQ. FT OR ACRES | RATE PER |
|---|---|
| 0 to 5 | $ 100 |
| 5 to 10 | $ 75 |
| 10 to 15 | $ 50 |

**ProValuation Land Engine**

**Model Number:** 701999  **Land Type:** F Front Lot

**Neighborhood Number:** 10010  **Method:** 32 <+> Site Value (lump sum amount) (by site rating)

**Comment:** P-1

**Type**
- ○ Market
- ○ Use

☑ Active

**Method Options**

Use LessThan 1 Acre Factor?
- ○ Yes   ○ No

Range Methods Application Option
- ○ Buildup / Average   ○ Step / Flat

**Default Rate #** 0

[Copy] [Paste]

**Value Definitions**

| | | | | | |
|---|---|---|---|---|---|
| Value #1 | 23000 | Value #8 | | Value #15 | |
| Value #2 | 18000 | Value #9 | | Value #16 | |
| Value #3 | 16000 | Value #10 | | Value #17 | |
| Value #4 | 15000 | Value #11 | | Value #18 | |
| Value #5 | 13000 | Value #12 | | Value #19 | |
| Value #6 | 11000 | Value #13 | | Value #20 | |
| Value #7 | 9000 | Value #14 | | [Forward] | |

[Save] [Cancel] [Select] [Exit]   02/24/1998

*illustration #1*

19

## Methods 31 through 38

Are similar to Methods 1 through 7 except they key from the site rating field.

From the TABLES / CHARACTERISTIC DESCRIPTIONS / Characteristic Codes.
you can set up your own Land Site Rating Codes that will show up in the *base parcel record* within the parcel itself.



Group 1 Equals Value #1 in *Illustration #1* , or $23,000.

Group 2 equals value #2 in *Illustration #1* and so on.

You can add your own definitions. Try it sometime it's fun. Just remember Group # in Characteristics equals Value # in Land Engine.

*Illustration #2*



When Excellent is chosen in Neighborhood 10010 with a Land Method of 32 the resulting value is $23,000 from value group #1.
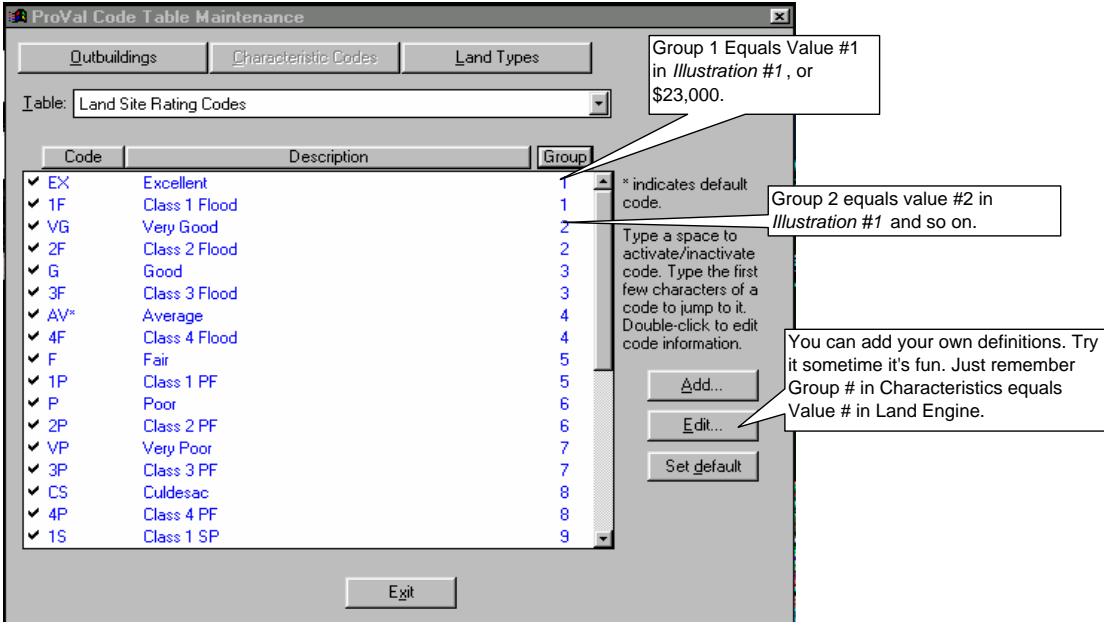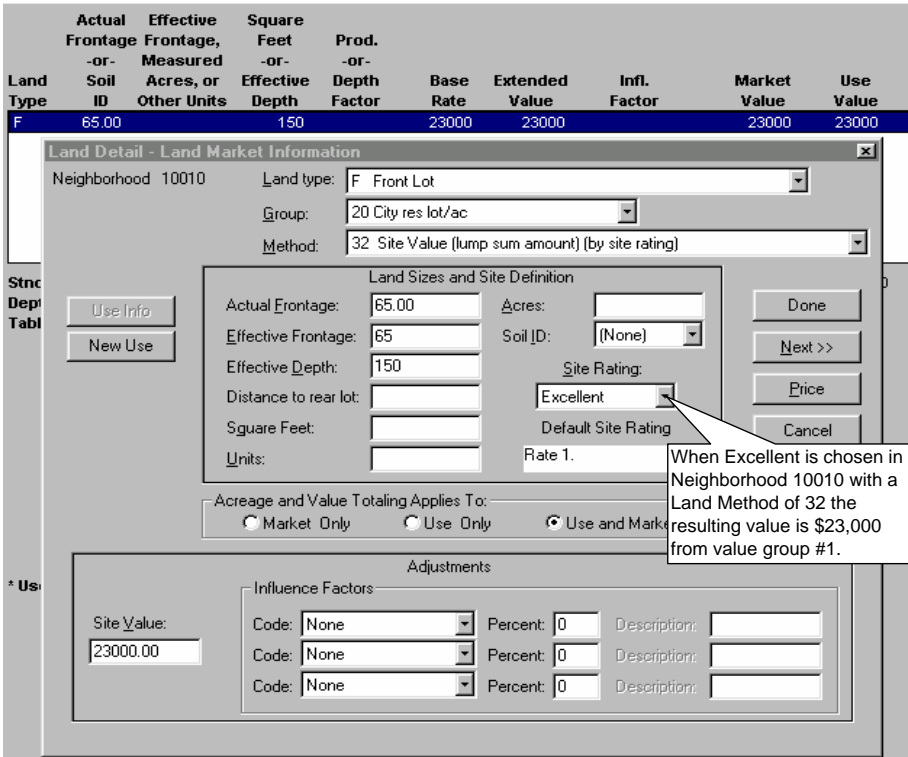
*Illustration #3*

This method can be particularly useful if you have conditions related to separate specific items; poor location or steep hillside lots within a neighborhood because you can choose your own definition.

# INDIANA LAND Method 12

| Model Number: | 701998 | Land Type: | 11 Primary Commercial/Indust Land |
|---|---|---|---|
| Neighborhood Number: | 10011 | Method: | 39 Per Acre w/L&H (by site rating) |

L&H = Low & High (Indiana users)

**Type**
- ⦿ Market
- ○ Use

☑ Active

**Method Options**

Use LessThan 1 Acre Factor?
- ⦿ Yes
- ○ No

Range Methods Application Option
- ○ Buildup / Average
- ○ Step / Flat

Default Rate #   0

Copy

Paste

**Value Definitions**

| | | | | | |
|---|---|---|---|---|---|
| Rate #1 | 0 | Rate #8 | | Low Rate #2 | |
| Rate #2 | | Rate #9 | | Low Rate #3 | |
| Rate #3 | | Rate #10 | | Low Rate #4 | |
| Rate #4 | | Rate #11 | | Low Rate #5 | |
| Rate #5 | | Rate #12 | | Low Rate #6 | |
| Rate #6 | | Rate #13 | | Low Rate #7 | |
| Rate #7 | | Low Rate #1 | 0 | Forward | |

Save    Cancel

Select    Exit

NEW RECORD

## Methods 41 through 46

When User Override Rates are used values cannot be updated in Mass. Use at your own risk.

| | |
|---|---|
| Model Number: 701998 | Land Type: 11 Primary Commercial/Indust Land |
| Neighborhood Number: 10011 | Method: 41 User Override Rate Per Foot - Effective Frontage |

Comment:

Type
- Market
- Use

☑ Active

Method Options
Use LessThan 1 Acre Factor?
- Yes
- No

Range Methods Application Option
- Buildup / Average

Copy

use this proceeding a Negative Number in your formula

Value Definitions
Low Rate  0
High Rate  0

Save    Cancel

Select    Exit    NEW RECORD

## Method 49 User Defined Formula

| | |
|---|---|
| Model Number:      701998 | Land Type:    11  Primary Commercial/Indust Land |
| Neighborhood Number:   10011 | Method:      49  User Definable Land Formula |
| | Type:        Market |

Buttons:
( ) x / + -
Actual Frontage    Large Measure (Acres, etc.)
(-1) x    Square Root    Round (10)    Effective Frontage    Small Measure (SqFt, etc.)
Truncate    Power    Round (100)    Effective Depth    Other Units (Lots, etc.)
<< Reset / Clear    < Back Up One <    Apply Constant ->

Rounds the number behind it to a whole number. (1.123 becomes 1)

use this proceeding a Negative Number in your formula

NOTE: Constants must be positive and the minimum value allowed is 0.100.
Formulas may use up to 40 of the commands, values and constants.
Evaluation is left to right within ()'s with commands used in the following order:
(-1)x, Square Root, Power, Truncate, x or /, + or -, and finally rounding.

Return for Save or Cancel    NEW RECORD

Create New Model from Existing Model    Select    Exit

**REMEMBER: The formula calculates a whole value then calculates a base rate**

**for the unit selected in your formula, in the following order;**

1  Other Units (Lots, etc.)
2  Small Measure (SqFt, etc.)
3  Large Measure (Acres, etc.)
4  Effective Frontage
5  Actual Frontage
6  Effective Depth

22

# Method 49 User Defined Formula (cont.)

ProValuation Land Engine

Model Number: 701999   Land Type: 92 Mountain Homesite

Neighborhood Number: 1   Method: 49 User Definable Land Formula

Type: Market

Buttons: [ ( ] [ ) ] [ x ] [ / ] [ + ] [ - ] | Actual Frontage | Large Measure (Acres, etc.)
[ (-1) x ] [ Square Root ] [ Round (10) ] | Effective Frontage | Small Measure (SqFt, etc.)
[ Truncate ] [ Power ] [ Round (100) ] | Effective Depth | Other Units (Lots, etc.)
[ << Reset / Clear ] [ < Back Up One < ] | Apply Constant -> |

Formula display:
11782.000 x ( LargeUnits ToThePowerOf 0.486 )

NOTE: Constants must be positive and the minimum value allowed is 0.100.
Formulas may use up to 40 of the commands, values and constants.
Evaluation is left to right within ()'s with commands used in the following order:
(-1)x, Square Root, Power, Truncate, x or /, + or -, and finally rounding.
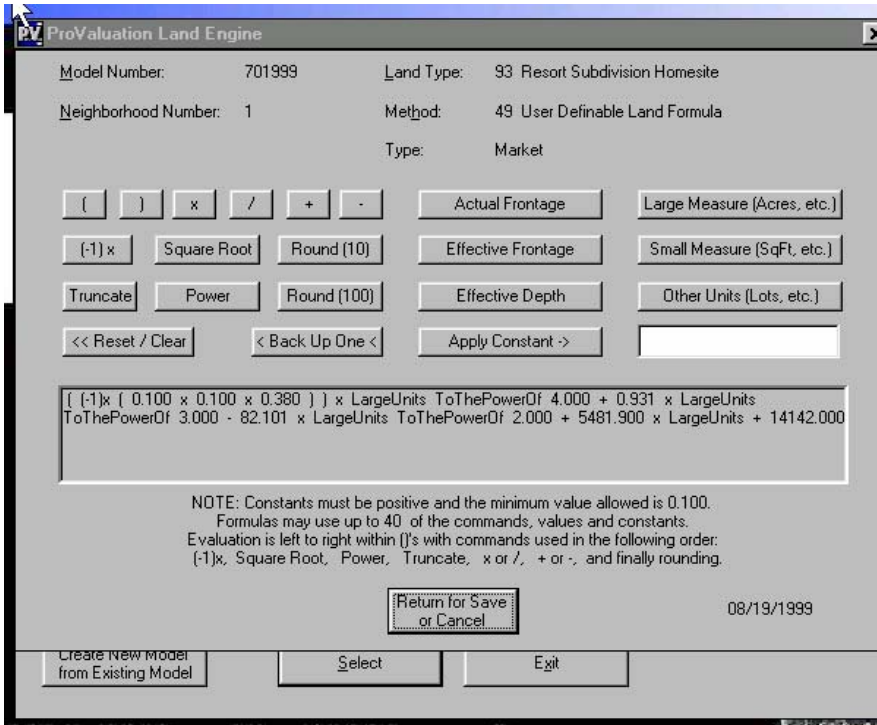
[ Return for Save or Cancel ]   08/19/1999

Create New Model from Existing   [ Select ]   [ Exit ]

lowman formula

32-bit Crystal Report Designer   SnagIt32 4.3

**Lowman area**

ProValuation Land Engine

Model Number: 701999   Land Type: 93 Resort Subdivision Homesite

Neighborhood Number: 1   Method: 49 User Definable Land Formula

Type: Market

Buttons: [ ( ] [ ) ] [ x ] [ / ] [ + ] [ - ] | Actual Frontage | Large Measure (Acres, etc.)
[ (-1) x ] [ Square Root ] [ Round (10) ] | Effective Frontage | Small Measure (SqFt, etc.)
[ Truncate ] [ Power ] [ Round (100) ] | Effective Depth | Other Units (Lots, etc.)
[ << Reset / Clear ] [ < Back Up One < ] | Apply Constant -> |

Formula display:
( (-1)x ( 0.100 x 0.100 x 0.380 ) ) x LargeUnits ToThePowerOf 4.000 + 0.931 x LargeUnits ToThePowerOf 3.000 - 82.101 x LargeUnits ToThePowerOf 2.000 + 5481.900 x LargeUnits + 14142.000

NOTE: Constants must be positive and the minimum value allowed is 0.100.
Formulas may use up to 40 of the commands, values and constants.
Evaluation is left to right within ()'s with commands used in the following order:
(-1)x, Square Root, Power, Truncate, x or /, + or -, and finally rounding.

[ Return for Save or Cancel ]   08/19/1999

Create New Model from Existing Model   [ Select ]   [ Exit ]

| Acres | Price Per Acre | Total Value |
|---|---|---|
| 1 | 16800 | 16800 |
| 1.5 | 13964 | 20946 |
| 2 | 12273 | 24546 |
| 3 | 10268 | 30804 |
| 4 | 9072 | 36288 |
| 5 | 8257 | 41285 |
| 6 | 7654 | 45924 |
| 10 | 6232 | 62320 |
| 15 | 5335 | 80025 |
| 20 | 4801 | 96020 |
| 40 | 3788 | 151520 |
| 60 | 3340 | 200400 |
| 80 | 3073 | 245840 |
| 100 | 2890 | 289000 |

**ProVal Go around** .1x.1 inside paren will allow more than 3 decimal points within constant

# 3.
# Entering Local Cost Modifiers

**Local Cost Modifiers can be placed at the neighborhood level. (This is the reasoning behind the idea of having Manufactured Housing only neighborhoods).**



**The adjustment made at the neighborhood level is a "blanket" adjustment. To be more specific in applying Local Cost Modifiers, you can do so in the residential tables.**

## A. Applying a Local Cost Modifier on stick built homes.

**Your local market has proven that you need to adjust the base cost of average stick built homes by +5%**

Go into the Residential Age/Factors Table.

Select Grades, Age Adjustments and Other Factors.

Under GRADES, select Overall Default Factors.

Select Avg.

Enter the appropriate factor.
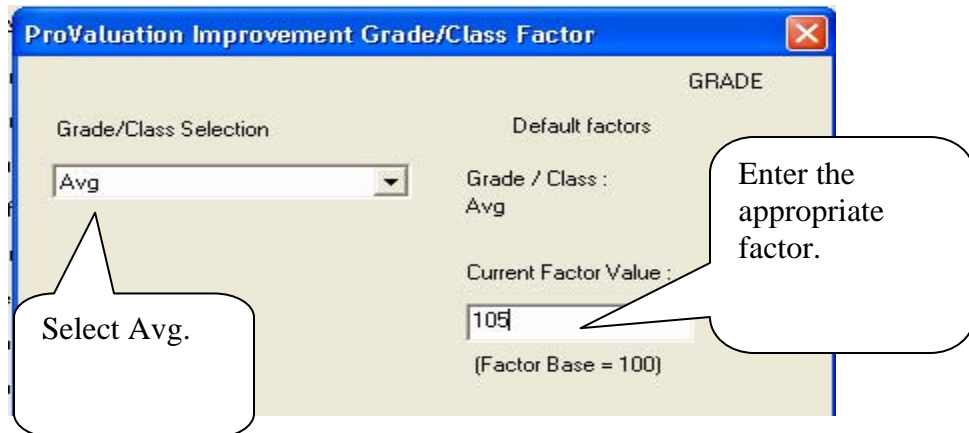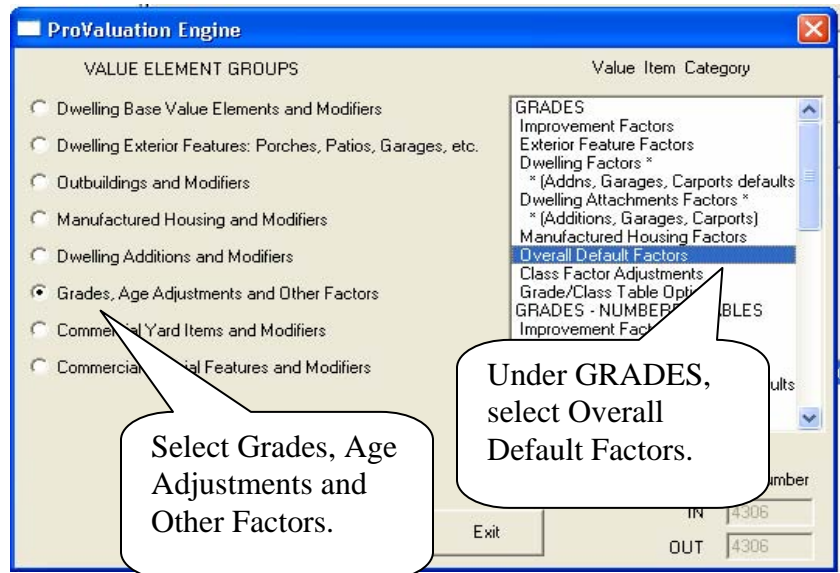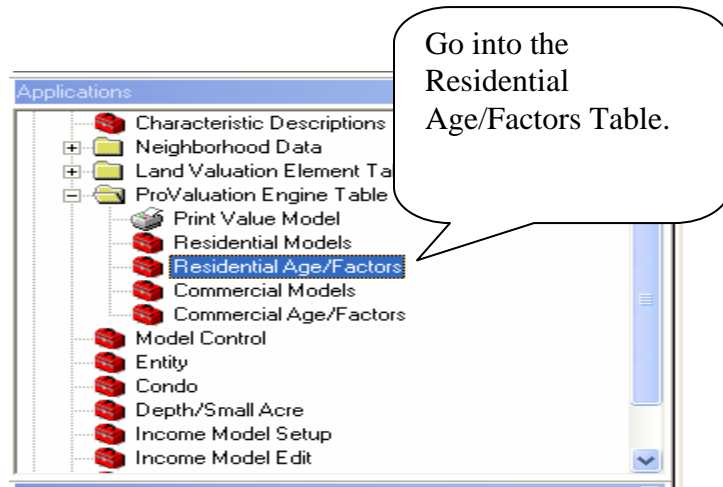
Necessary Local Cost Modifier adjustments can be added to Outbuildings, Manufactured Homes, and Garages by making the proper selection under the GRADES area.
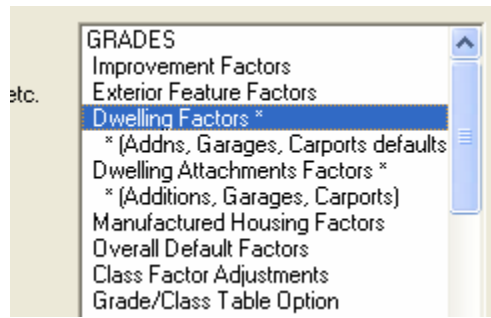


**B**.  **You can use what are called GRADES NUMBERED TABLES in the instance where you only want to apply a specific LCM against parcels in a particular Neighborhood or group of Neighborhoods**.



You can have up to 99 numbered tables.  I will select 1 as an example.

In the Numbered Tables area, select Overall Default Factors.

Enter the appropriate Local Cost Modifier(s)

Average is the example only, you can set up factors for all or some of the grades at this point.

3

**Residential Neighborhood Residential Improvement Table Maintenance**

Number: 340    Open    Next    Previous    New

Name:  WEISER COMMERCIAL/INDUSTRIAL

Pricing Type
Cost    Change

Effective Date
11/26/2004    Change    Today

Between (Inclusive):

...vation Date:  02/05/2002    Inactivation Date:  12/31/9999    NEW

**Pricing ...ferences**

(1) Model Serial ...:  4306

(2) House Type Fac...
Model Number:  0

(3) Age Model Number:  0

(4) Grade Model Number:  1

**Neighborhood Factors**

(5) Default Local Modifier:  0

(6) Other Improvements
Local Modifier:  0

**Other Miscellaneous Items**

(7) Neigh. Rating:  (None)

Create New Set Of Records    Inactivate    Cancel    Save    Quit

Switch to Control
Switch to Land
Switch to Com Impr

> To use the numbered table, enter it in the Residential Neighborhood(s) you want to affect.  By putting a 1 in this field, the +115% will be applied to these average dwellings only.

**!TIP  If you plan on using Numbered Tables, it will be helpful to maintain screen prints or create other documentation explaining what the numbered table is and what neighborhoods it is used in.**
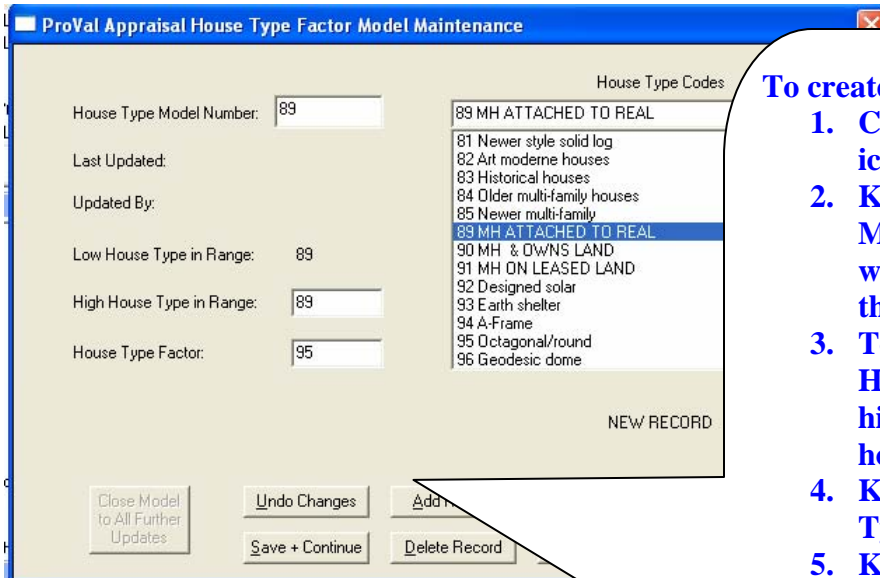
# 4.
# House Type Modifiers



**You can edit the house types to meet your needs in the Codes Table.**

**Need to create a model that will apply a modifier to house type 89.**



**Start here to create a model**

**ProVal Appraisal House Type Factor Model Maintenance**

House Type Model Number: 89

Last Updated:

Updated By:

Low House Type in Range: 89

High House Type in Range: 89

House Type Factor: 95

**House Type Codes**

89 MH ATTACHED TO REAL
81 Newer style solid log
82 Art moderne houses
83 Historical houses
84 Older multi-family houses
85 Newer multi-family
89 MH ATTACHED TO REAL
90 MH & OWNS LAND
91 MH ON LEASED LAND
92 Designed solar
93 Earth shelter
94 A-Frame
95 Octagonal/round
96 Geodesic dome

NEW RECORD

Close Model to All Further Updates     Undo Changes     Add

Save + Continue     Delete Record

**To create a new model;**
1. **Click the "Add Record" icon.**
2. **Key in the House Type Model Number you would like to assign to this model.**
3. **To establish the "Low House Type in Range", highlight the beginning house type code.**
4. **Key in the "High House Type in Range".**
5. **Key in the House Type Factor needed. (95 = -5, 105 = +5)**
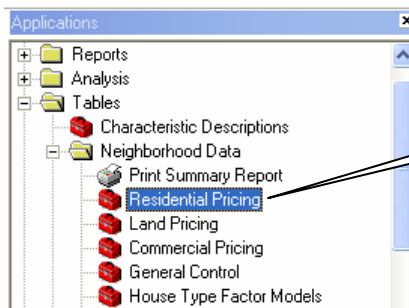6. **Click "Save + Exit" icon when ready.**

**SPECIAL NOTE**
Once you enter this model into a neighborhood (see below), it will apply to each entry in that neighborhood that has this house type number, the next time a parcel is valued.

**The current record has not been added to the table list.**

Do you want to add it to the table before the database is updated?

Yes     No

Click "Yes" if you get this message.

*At this point, the model has been created.*

Now, you will need to add this model number to any neighborhood that you need the modifier to be applied to.

**Applications**

Reports
Analysis
Tables
  Characteristic Descriptions
  Neighborhood Data
    Print Summary Report
    Residential Pricing
    Land Pricing
    Commercial Pricing
    General Control
    House Type Factor Models

**Select this option**

2

## ProVal Appraisal Neighborhood Residential Improvement Table Maintenance

Neighborhood: Number: 301    Open   Next   Previous   New

Name: Rural Area 1

**Update Information**
Last Updated: 08/21/2003
Updated By: JOAN

**Pricing Type**
Cost   Change

**Effective Date**
03/03/2004   Change   Today

**Record Valid Between (Inclusive):**
Activation Date: 09/09/2000    Inactivation Date: 12/31/9999    NEW

| Pricing Model References | Neighborhood Factors | Other Miscellaneous Items |
|---|---|---|
| (1) Model Serial Number: 4306 | (5) Default Local Modifier: 0 | (7) Neigh. Rating: (None) |
| (2) House Type Factor Model Number: 89 | (6) Other Improvements Local Modifier: 0 | |
| (3) Age Model Number: 0 | | |
| (4) Grade Model Number: 0 | | |

**Enter the *Model* number here.**

Create New Set Of Records   Inactivate   Cancel   Save   Quit

Switch to Control
Switch to Land
Switch to Com Impr

---

| Parcel | Land | Values | Sketch | Improv | Admin | Images | Comps |

Summary | History | Buildup

**Buildup**

| Floor | Size | Finished | Value |
|---|---|---|---|

Floor Base Value

Property Card: **ATTACHED MOBILE HOM**

Adjustments & Features
Frame/Siding/Roof/Dormers
Loft/Cathedral
Interior Finish
Basement Finish
Heating
Cooling
Plumbing
Fireplaces
Other Features
Extra Living Units

Attached/Integral Garage
Carport
Basement Garage
Porch/Deck/Patio, etc.

| | | |
|---|---|---|
| Crawl/Slab | | |
| Total Base Value | | |
| Row Type Adjustment | | |
| Base Rate | | |
| Subtotal Adj. & Features | | |
| Sub-total, 1 unit | | |
| Sub-total, all units | | |
| Subtotal Garages & Porches | | 0 |
| Total Adjusted Base Value | | |
| Grade Adjustment | | |
| Grade Adjusted Value | | 52030 |
| Adjusted Base Rate | | $28.76 |
| Physical Depreciation | 20 % | 10410 |
| Functional Depreciation | 0 % | |
| External Depreciation | 0 % | 0 |
| Total Depreciation | | 10410 |
| RCN Less Depreciation | | 41620 |
| Relative Desirability Factor | | |
| Location Adjustment | 95 % | (-2081) |
| % Complete | 100 % | 0 |
| Total Adjustments | | (-2081) |
| Final Value (rounded), 1 unit | | 39539 |
| Rate per Size | | $21.86 |
| Unit count | | 0 |

| ID | Type | Year Built | Eff Year | Cond | Grade |
|---|---|---|---|---|---|
| M | MHOME | 2000 | 1999 | AV | Good |
| 02 | MISC | 1900 | 1900 | AV | Avg |
| 03 | MISC | 1900 | 1900 | AV | Avg |

**Adjustment shows up here.**

Total this card
Total all cards

# 5.
# Trending Models

**Trending or Indexing within ProVal is fairly simple but you need to set up the trending model.**

1.  **First Create the Trending Model**



Select Model Control.
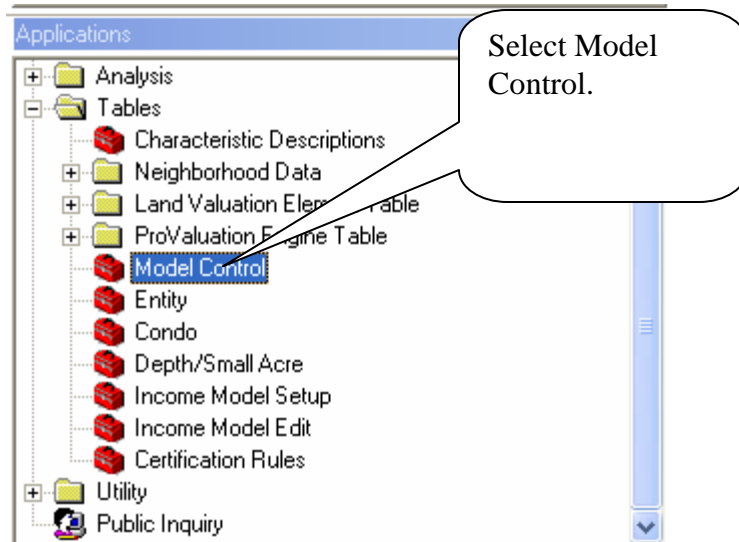
2.  **Select Add to add a new trending model**
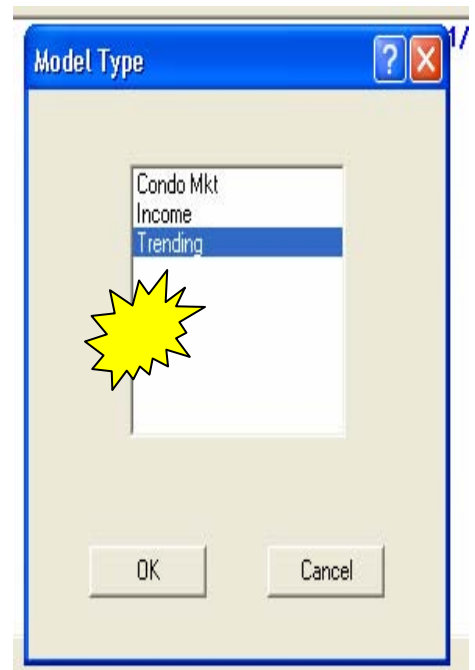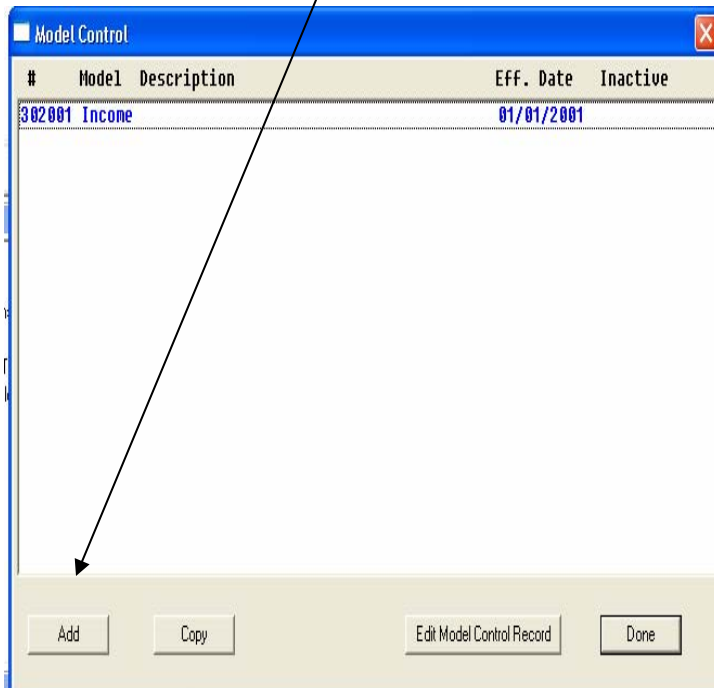
**Model Control Record**

Model serial number  900001  Date created  11/26/2004

Last update

Model created from  0  Update by

Model type  Trending  Date locked

Base year  2005  Locked by

Effective date  11/25/2004  Date first use

Inactive date  12/31/2005  Date la

Description  10% on cat 20

Edit Trending Detail List  OK  Cancel

Depending on the situation, this may be as general 2005 Trend or as specific as the example. Select Edit Trending Detail List to add trending rules

**Trending Models**

No.  Area  Property class

Add  Delete  Edit Detail Record

OK  Cancel

You have created the model, now you need to add trending rules.

Enter the trend factor.

**Trending Record**

Area  001  Land Factor  110.0000

Neighborhood  0  ☑ All  Improvements Factor  100.0000

Begin  End

Property Class  0  0  ☑ All

Tax District  ☑ All

Comment  add 10% to cat 20 only

Group Codes  ☐ All

15 Rural res sub
16 Rural com sub
17 Rural ind sub
18 Rural other
19 Public ROW
20 City res lot/ac
21 City com lot/ac
22 City ind lot/ac
25 Common area
26 Condo/twnhse
27 Comm condo
30 Non-res imp on 20
31 Res imp on 10

OK

Cancel

All neighborhoods is for example only, at this point you could select a specific neighborhood.

It is possible to highlight as many categories to this as necessary.

**Trending Models**

No.  Area  Property class

1  001  all  add 10% to cat 20 only

Add  Delete  Edit Detail Record

OK  Cancel

## Trending Record

Area: `001`

Neighborhood: `0` ☑ All

Land Factor: `100.0000`

Improvements Factor: `100.0000`

|  | Begin | End |  |
|---|---|---|---|
| Property Class | `0` | `0` | ☑ All |
| Tax District | | | ☑ All |

Comment: `100% on everything else`

Group Codes ☐ All

```
15 Rural res sub
16 Rural com sub
17 Rural ind sub
18 Rural other
19 Public ROW
20 City res lot/ac
21 City com lot/ac
22 City ind lot/ac
25 Common area
26 Condo/twnhse
27 Comm condo
30 Non-res imp on 20
31 Res imp on 10
```

> All group codes (categories) must be accounted for in the model. If it is not being indexed it needs to be at 100%

Cancel

## Trending Models

| No. | Area | Property class | |
|---|---|---|---|
| 1 | 001 | all | add 10% to cat 20 only |
| 2 | 001 | all | 100% on everything else |

> It's possible to add as many trending rules as necessary within this model.

Add    Delete    Edit Detail Record

OK    Cancel

**To apply the trend, go to batch valuation | Value Trending**

Applications

```
☐ Maintenance
  ☐ Batch Valuation
       Cost Models
       Market Models
       Value Trending
       Change Valuation Method
  ☐ Property Record Cards
       Post Values
       Notices
       Neighborhood Batch Change
       Permits
  ☐ Reports
  ☐ Analysis
  ☐ Tables
  ☐ Utility
```
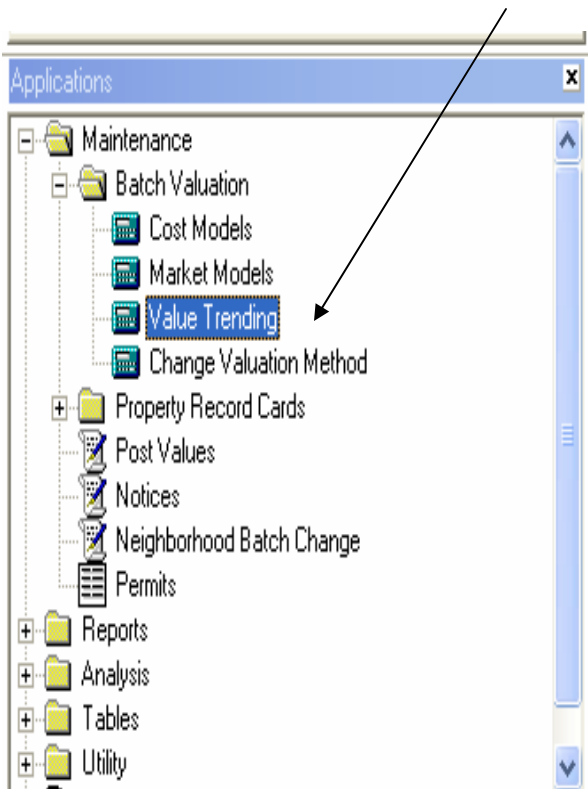
## Batch Processing for Trending

Area: `001`

Parcel Selection
- ◉ All Parcels
- ○ Input File
- ○ Parcel Set `_____`
- ○ PIN
- ○ Owner
- ○ Address
- ○ Alternate PIN
- ○ Neighborhood

From: `RPH04170080`

To: `RP`

Property Classes
- ◉ All Property Classes
- ○ Range `___` to `___`
- ☐ Agricultural
- ☐ Mineral
- ☐ Industrial
- ☐ Commercial
- ☐ Residential
- ☐ Exempt
- ☐ Utility
- ☐ Other classes

Taxing District
- ◉ All Districts
- ○ District `xxxxxx`

> This is the standard batch operation screen; you can apply the trend within the limits you select here.

## Model Selection For Batch Trending

| # | Description | Eff. Date | Inactive |
|---|---|---|---|
| 900001 | 10% on cat 20 | 11/25/2004 | 11/25/2 |

Select the Trend Model you wish to use. Run it in REPORT ONLY until you are certain you are ready.

Options

☑ Report only

OK    Cancel

---

## Batch Trending Edit Report

Save in: Desktop

Recent

My Documents
My Computer
My Network Places
AS400
bretts guide
EXPORTFILES
New Folder
patchesfix
Proval Plus
stuff
wav
Weekly Items
XX_SQL Scripts
New Text Document (3).txt
New Text Document.txt

Shortcut to User

Desktop

My Documents

My Computer

My Network Places

Save the output file as a text file and name it something that you can easily identify it by.

File name: BatTrend 2005_20.txt    Save

Save as type: Text files (*.TXT)    Cancel

**This is an example of the output file.  It will list a summary of all the parcels within the limits you selected on the batch operations screen.**

**The Trending Report**

Note the 110 on the cat 20 and 100 on all else.

```
RPM6510004006AA                Twp:001     Nei:230      Prop Class:520       Tax District:
     Group Code          Base   Trended          % Rule  Ext Line Dwell ImpId  ImpType
     ----------       --------  -------  --------  ---- ----  --- ---- ----- -----  --------
       41          I 1550        1550     100.0000 2     R01 0    0          01     SHEDGP
       41          I 150         150      100.0000 2     R01 0    0          02     UTLSHED
       41          I 2000        2000     100.0000 2     R01 0    1          D      DWELL
       20          L 8440        9280     110.0000 1     L00 1    0
     Summary:
       Land        8440        9280
       Imp         3700        3700
       Total      12140       12980
```

**There will also be a summary printed at the bottom of the report.**

```
9844 parcels processed.
9794 parcels found to update
                         old value          New value
                        ----------        ----------
land                    162,920,360       167,183,690
imp                     297,846,704       297,846,710
total                   460,767,064       465,030,400
```

**If the summary looks good then run the batch price without the Report Only box checked.**

Model Selection For Batch Trending

| # | Description | Eff. Date | Inactive |
|---|---|---|---|
| 900001 | 10% on cat 20 | 11/25/2004 | 11/25/2 |

By removing the check and running a batch price, you will lock this trending model and prevent it from being edited or used in the future.

Options
☑ Report only

OK    Cancel
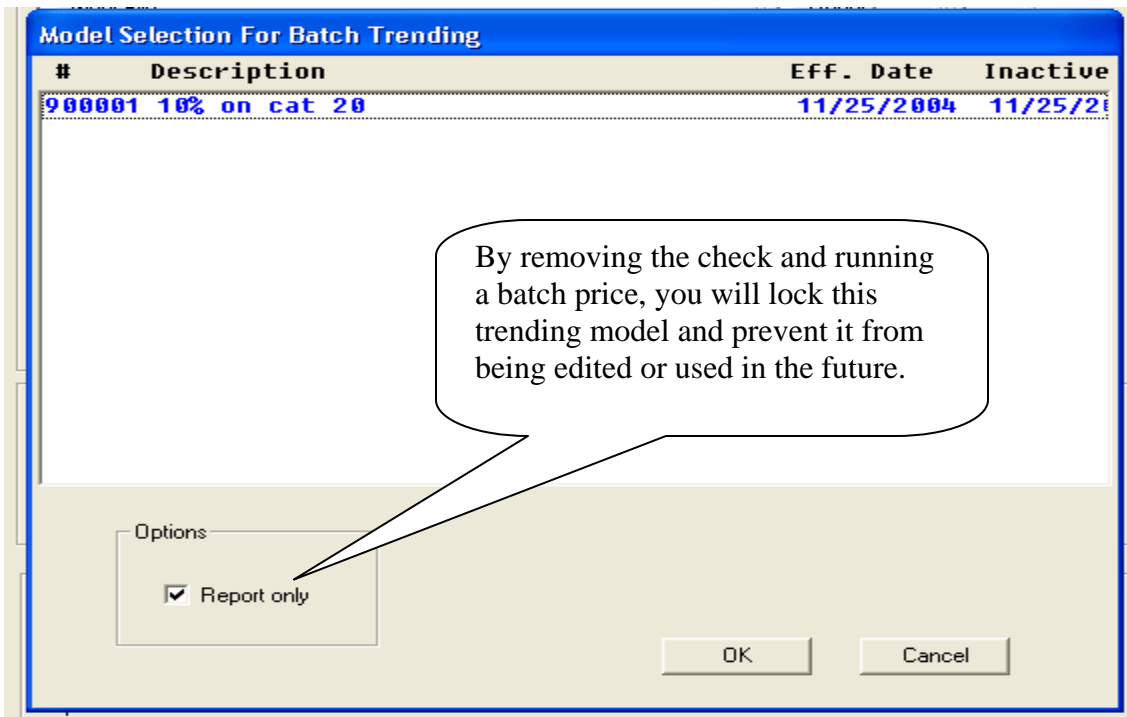
**!TIPS for Trending**

- **Plan ahead and run everything in report only several times if necessary.**
- **Consider using Input Files, they are flexible and efficient.**
- **Trend in ProVal first, and then upload the values to the AS400 to keep the values in the two systems balanced.  The Certification Checklist has a section devoted to trending prior to uploading values to the AS400.**
- **It's not suggested to trend by property class.**
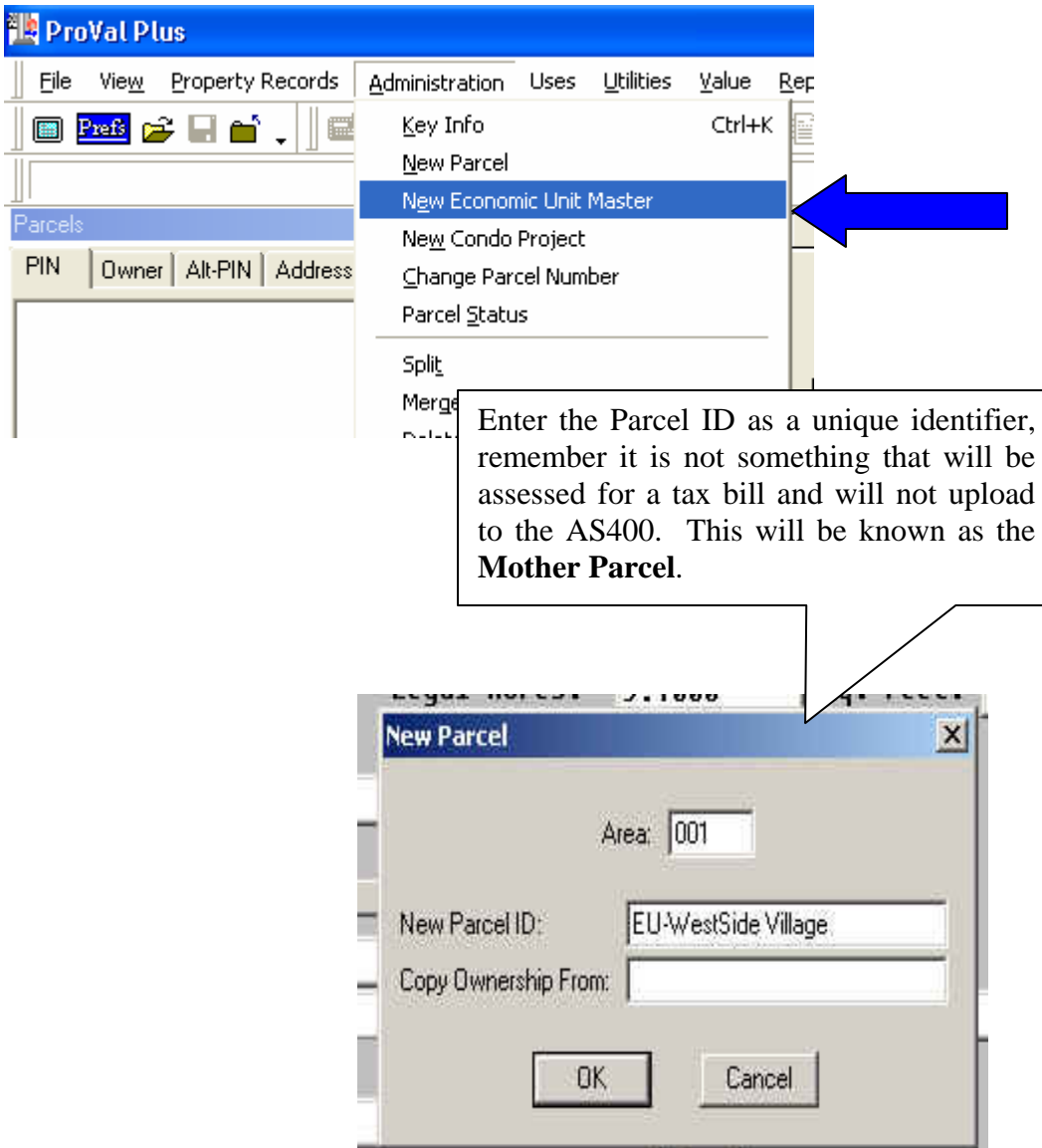
# How to Setup Economic Units

## Overview

- An Economic Unit is made up of a " Mother" Parcel and any number of "Child" Parcels. **THE MOTHER PARCEL WILL NOT BE TAXED.**
- Economic Units can be used with cost, income or market valuation methods**.**
- The Economic Unit is a model created by the user as a way to inventory and assign values to individual Parcels based on a percentage of ownership.
- PROVAL created the Economic Unit as tool to value projects made up of multiple parcels shouldering a proportional amount of the overall land and improvement values.
  - **Examples of but not limited to: Shopping Centers, Malls, Professional Offices, Parking and Common Areas, Fractional Ownerships, Condos and Townhouses.**

## Create an Economic Unit (EU)

- Administration | Create Economic Units



Enter the Parcel ID as a unique identifier, remember it is not something that will be assessed for a tax bill and will not upload to the AS400. This will be known as the **Mother Parcel**.

Enter Administration information like **Property Class and Neighborhood** that are necessary.

Alt PIN:

Assoc Prcl:

Assem. Prcl:

☑ Economic Unit

Property Class: 421  ☐ Active Homestead

421- Commercial lot/ac in city ▼

Jurisdiction:

Area: 001

This part is optional but you can enter information here.

Plat Book:  Page:

Legal Acres: 0.0000  Sq. Feet: 0

Neighborhood: 1  Neigh. Rating: AV ▼ OVR

IDAHO CITY

Routi  er:

Reval Neigh: 0  Neigh. Rating: AV ▼ DEF

Proper  ddress  Update

Street  0

City:  State: ID ZIP:

☐ Alternate Name and Address

Owner:

It is also a good idea to note that this is the Economic Unit **Mother Parcel** in the Legal Description and create a memo.

Address:

City:

Assoc Name:

❑ Child parcels will then need to be assigned to the Mother Parcel.

## Assigning Child Parcels

❑ A "Unit" is equal to a Child Parcel.
❑ The Child Parcels must be <u>active</u> Parcels already existing in Proval.

Select Condos & Economic Units | Economic Unit List.

Select ADD to prompt for a Parcel ID.

Enter a Parcel Number here. Select OK

PIN: RP015020020400A

OK  Cancel

Add  Remove  OK

2

**Economic Unit Parcels**

RP015020020400A
RP01502002041AA
RP01502003036AA
RP01502003036BA

The Parcels shown in this Unit List will be considered to be the Child Parcels of Economic Unit EU-Westside Village.

Select OK to complete the ADD function.

| Add | Remove | OK |
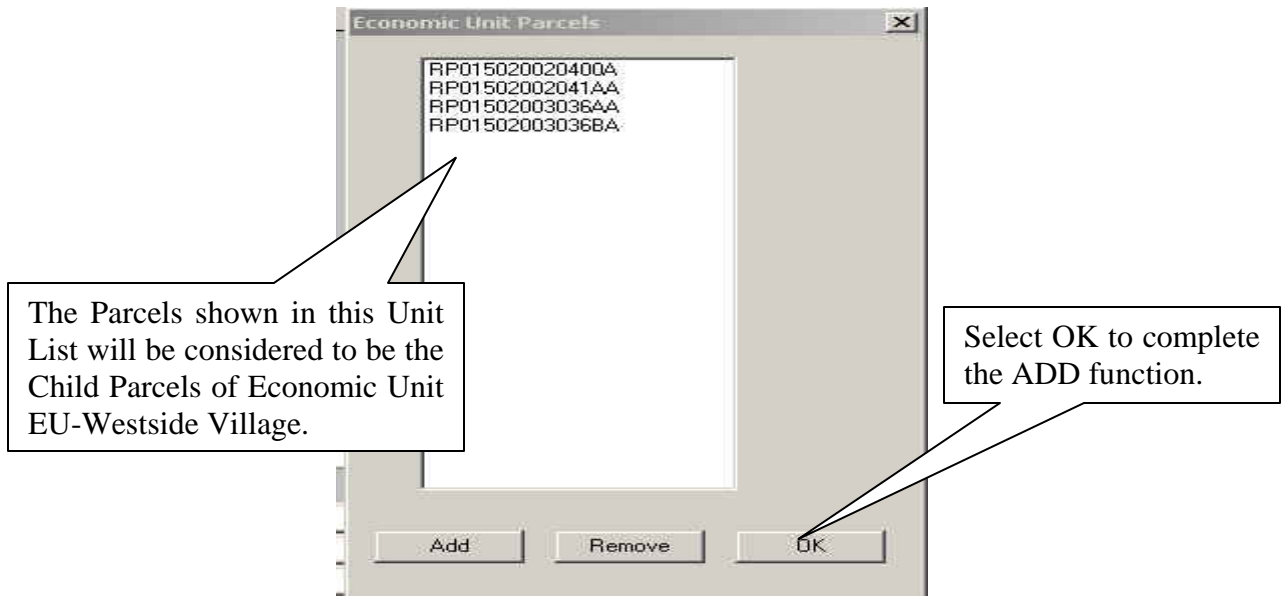
## Copy Child Land and Improvement information to the Mother Parcel.

❑ Open each of the Child Parcels you added to the Unit List.
❑ Use the Copy function to copy the Land and Improvement Data to the Mother Parcel.

**ProVal Plus**

File   View   Property Records   Admini

Open Parcel      Ctrl+O
Save             Ctrl+S
Save Parcel Se
Open Parce

Print

Next Parcel
Previous Parcel   Shift+F3

Select **OPEN PARCEL** to open a child parcel.

Then select **COPY**

Property Records

Add a Property Rec
Update a Property            d       Ctrl+U
Void a Property R            d
Recover a Voide    operty Record

Next                          F4
Previous                      Shift+F4

Copy
Move

Inspection Records
Condos & Economic Units

**NOTE:** Do this step with each Child Parcel in the EU list. **Start with the Child Parcel that has either all of the land value or has the majority of the land value.**

Enter the identity of the **Mother Parcel** here.

**Copy Parcel**

ID of Destination Parcel:   EU-WestsideVillage

| OK | Cancel |

3

Select YES

Select property records to move:

Land data record (Active)
R01: Residential record #01 (Active)

SELECT ALL and then OK. Open the next Child Parcel in the Unit List and repeat the step.

❑ **Remember** the first Child Parcel you copy will *always* include the **land**.
❑ The remaining Child Parcels to be copied will *only show improvement* records, if there are any.

## Editing and Pricing Land & Improvement Records in the Mother Parcel

❑ OPEN the **Mother Parcel**.

Enter the **Mother Parcel**
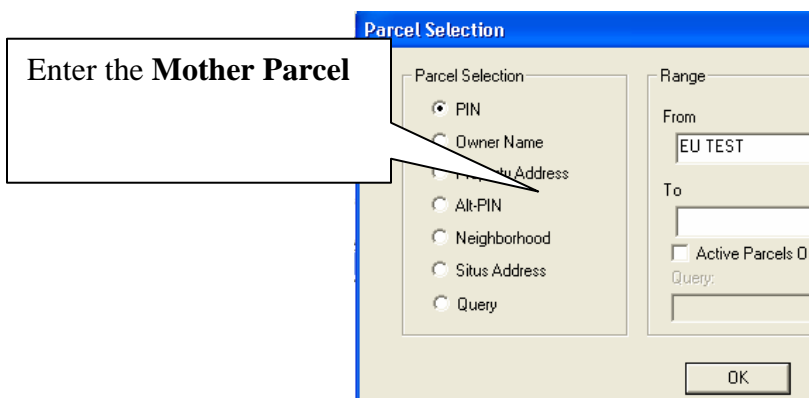
❑ Edit the Mother Parcel Land Record and price it.

Inside the **Mother Parcel**, is **one** Land Record as well as the Improvement Records (if any) of the Child Parcels.

Open the **Land Record**.

**ProVal 6.4 for Windows        Land Record**
File   Land Detail   Help

001 | | | | | 1 | A | 421

| Land Type | Soil ID | Actual Frontage -or- Measured Acres, or Other Units | Effective Frontage, Square Feet -or- Effective Depth | Prod. -or- Depth Factor | Base Rate | Extended Value | Infl. Factor | Market Value | Use Value |
|---|---|---|---|---|---|---|---|---|---|
| FD | | 5.0000 | | | 6900 | 34500 | | 34500 | 0 |
| DV | | | | | 5000 | 5000 | | 5000 | 0 |

Edit the **Land Detail Record(s)** so it will have a value that will represent a Grand Total of land value.

| Stnd Depth Table | | Acreages: Sq. feet: | Legal 0.0000 0 | Market 5.0000 | Use 0.0000 | ' Measured 0.0000 | 39500 | 0 |

Zoning: | | | | |

Site Characteristics                          Aggregate Acreages:
Topography        Pub. Utilities        Street or Rd        Neighborhood

The land value for each **Child Parcel** is determined by it's percentage of this total value. (*Consult your supervisor or consulting appraiser for questions about how to determine these percentages*).

1-0 | | | 1 | A | 421

| Type | ID | Other Units | Depth | Factor | lue | Infl. Factor | Market Value | Use Value |
|---|---|---|---|---|---|---|---|---|
| 14 | | 25.0000 | | | 90 | | 124400 | 0 |
| DV | | | | 2000 | | | 2000 | 0 |

| Stnd Depth Table | | Acreages: Sq. feet: | Legal 0.0000 0 | Market 25.0000 | Use 0.0000 | ' Measured 0.0000 | 126400 | 0 |

Zoning: | | | | |

Site Characteristics                          Aggregate Acreages:
Topography        Pub. Utilities        Street or Rd        Neighborhood
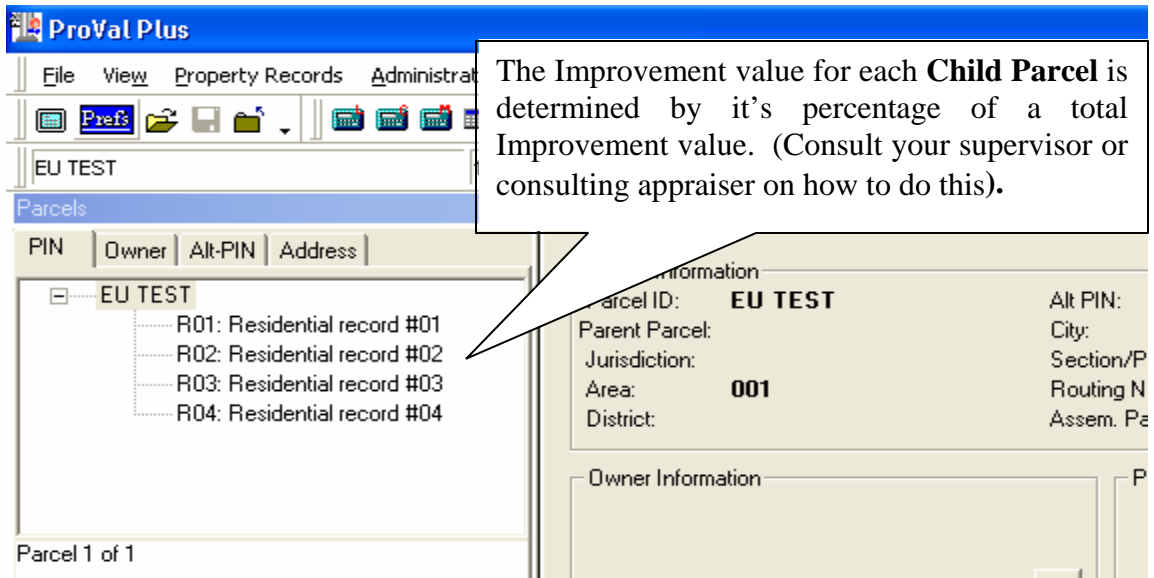
The Improvement value for each **Child Parcel** is determined by it's percentage of a total Improvement value. (Consult your supervisor or consulting appraiser on how to do this**).**

## Assigning Values to the Child Parcels
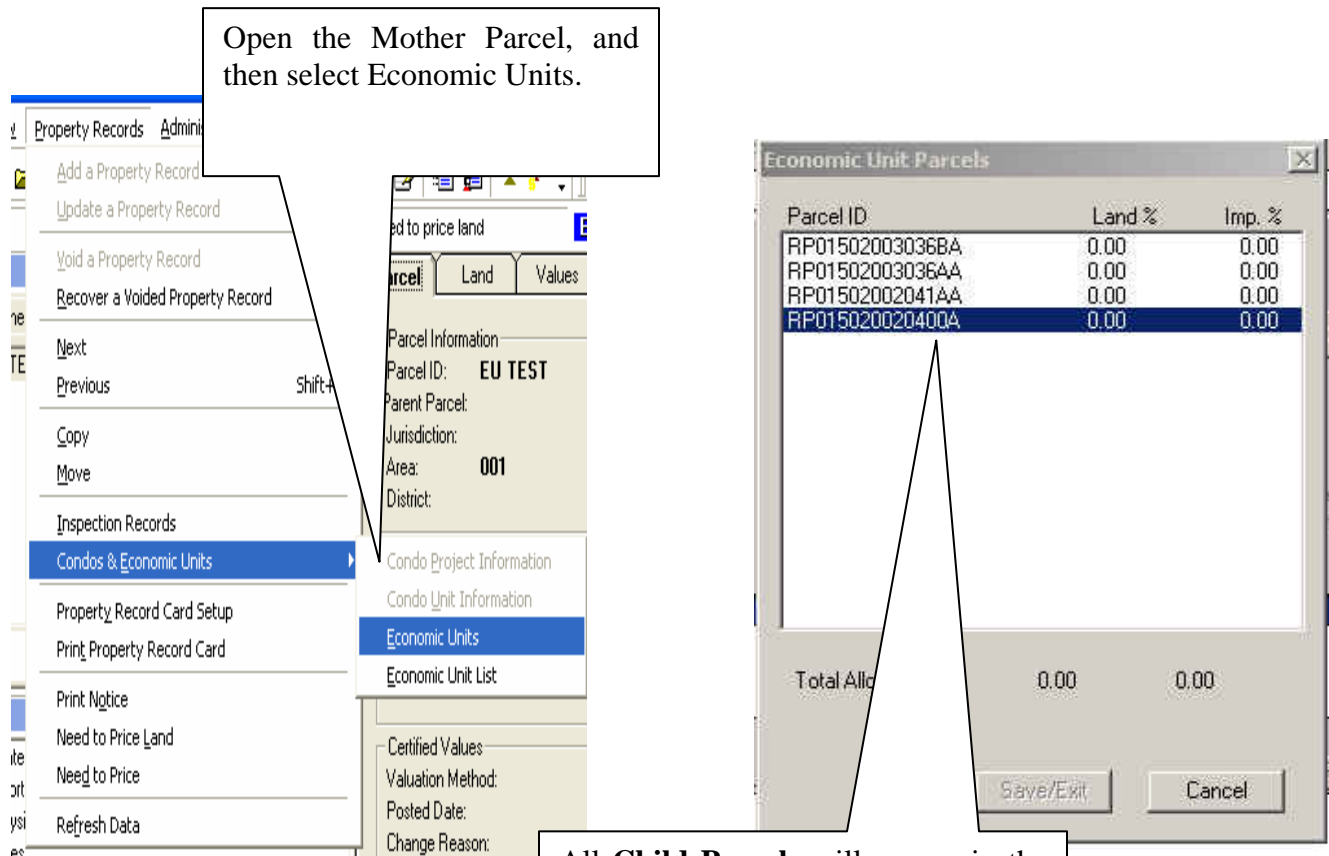
Open the Mother Parcel, and then select Economic Units.



All **Child Parcels** will appear in the Unit list. Note the percentages start at 0%. To assign a percentage to a Child Parcel, double click on the parcel number you want to edit.

**Economic Unit Parcels**

**Edit Economic Unit Parcel Value Allocation**

Land: `35`

Improvements: `25`

OK    Cancel

Total Allocated:    65.00    75.00

Save/Exit    Cancel
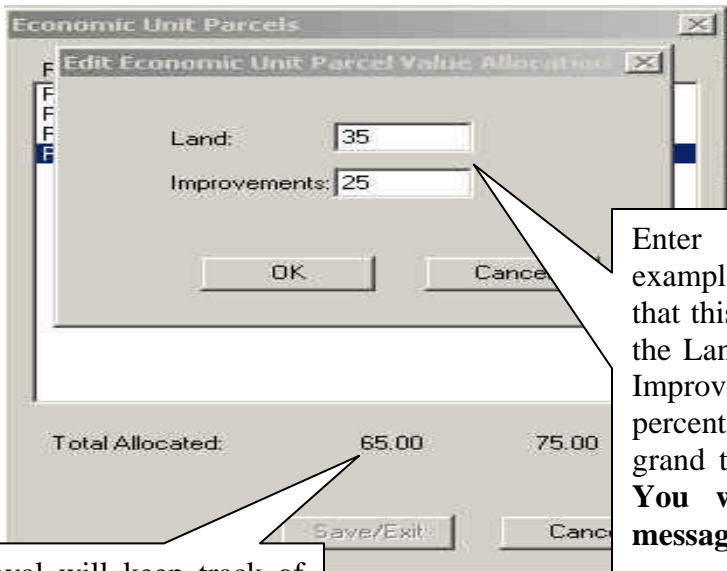
Enter the percentages. For example, you have determined that this Child Parcel is 35% of the Land value and 25% of the Improvement value. Assign the percentages as needed, but the grand total **must equal 100%. You will receive an error message if they are not.**

Proval will keep track of how much you have allocated so far.

**Economic Unit Parcels**

| Parcel ID | Land % | Imp. % |
|---|---|---|
| RP01502003036BA | 15.00 | 25.00 |
| RP01502003036AA | 25.00 | 25.00 |
| RP01502002041AA | 25.00 | 25.00 |
| RP0150200020400A | 35.00 | 25.00 |

Total Allocated:    100.00    100.00

Save/Exit    Cancel
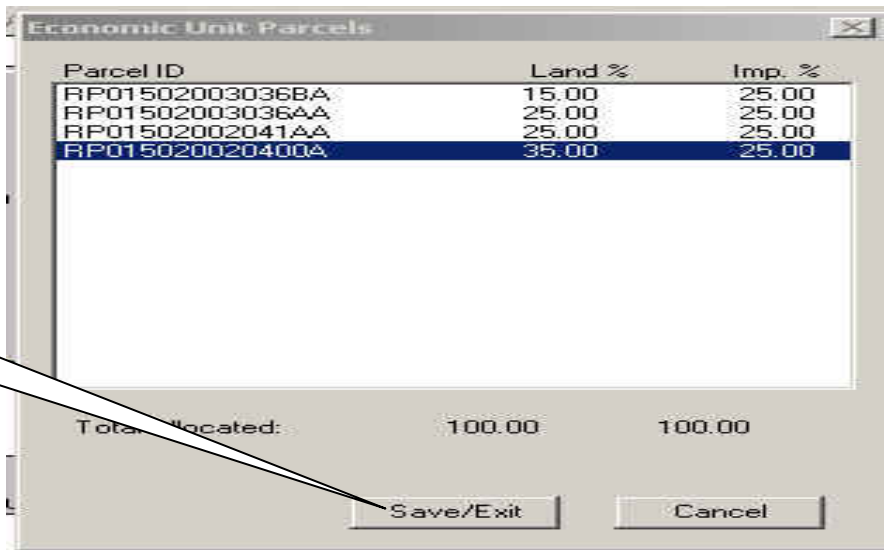
Save and Exit once you are done.

---

nents  Utilities  Value  Reports  Help

Price with Cost
Price with Market Models
Comparable Sales
Income

Allocations            F9
Correlation of Value   F10
Post Value Conclusion

✓ Need to Post
Need Notice
Update Value Modifiers

Exemptions

rcel has unposte    Locked    41:

Land    Admin

Eff
Type    Year

LL    1999
GAR    1999
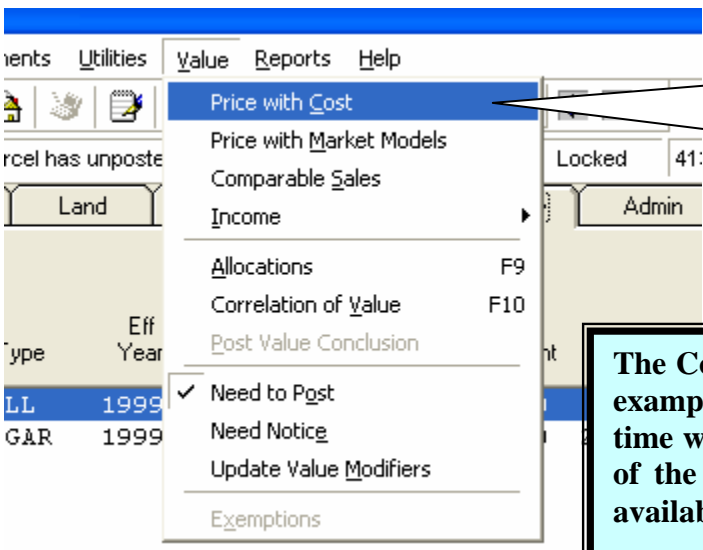
Use the appropriate valuation method to recalculate the **Mother Parcel** in order to assign the values to the **Child Parcels**.

**The Cost Method is used for this example only. There may be a time when you are using any one of the methods to finding value available in Proval.**

7

Below is an example of the Parcel Base Record of a **Child Parcel**.

Identifies it as part of the economic unit



The **Valuation Method** is OVERRIDE even though we used Cost to calculate a market value

You must set the allocations to have these values make sense.

# Tips and Things to Watch Out For

❑ Make certain the proper **Review Year Memos** have been placed on each of the Child Parcels. *This is done at the Child Parcel level*.

❑ Remember to set the **Allocations** as you would any other Parcel in Proval. *This is done at the Child Parcel level.*

❑ Depending on how many Child Parcels with improvement records were added, the Child Parcel's Allocations may resemble the example below labeled *BEFORE*. These **allocations must be cleaned up and correctly assigned** before you can post a Child Parcel to be certified. See the example labeled *AFTER*. ***Remember you Certify and Upload the Child Parcels and not the Mother Parcel.***

Make sure to edit the **Allocations on the child parcels** so there are not any duplicate Improvements or Unassigned Group Codes (98&99)



**BEFORE**

**AFTER**



You will see this message if the allocations are not set *for each and every Child Parcel* in that particular Economic Unit when attempting to Post for Certification.

# Tips and Things to Watch Out For Cont…

❑ **Batch Pricing** will *not* update Child Parcels. In order to update those particular parcels, open the **Mother Parcel** and select Value, then Recalculate by using the appropriate valuation method.

❑ Be sure to use **MEMOS** to further identify economic unit mother and child parcels.

❑ **Keep in mind** that a change that affects the value of an individual **Child Parcel,** *will result in a change in value for all Child Parcels in the economic unit.*

❑ Make certain the **Inspection Date** information is entered.



END

# ProVal Plus®
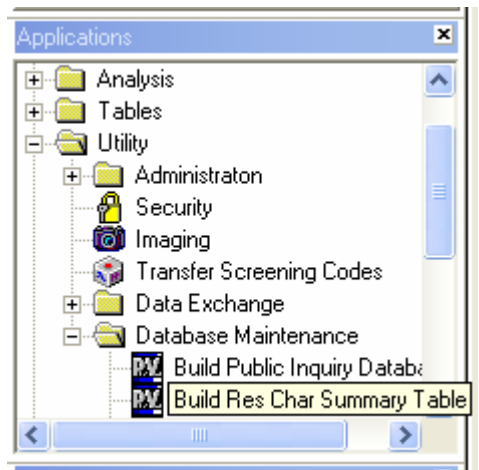
## Comparable Assessments
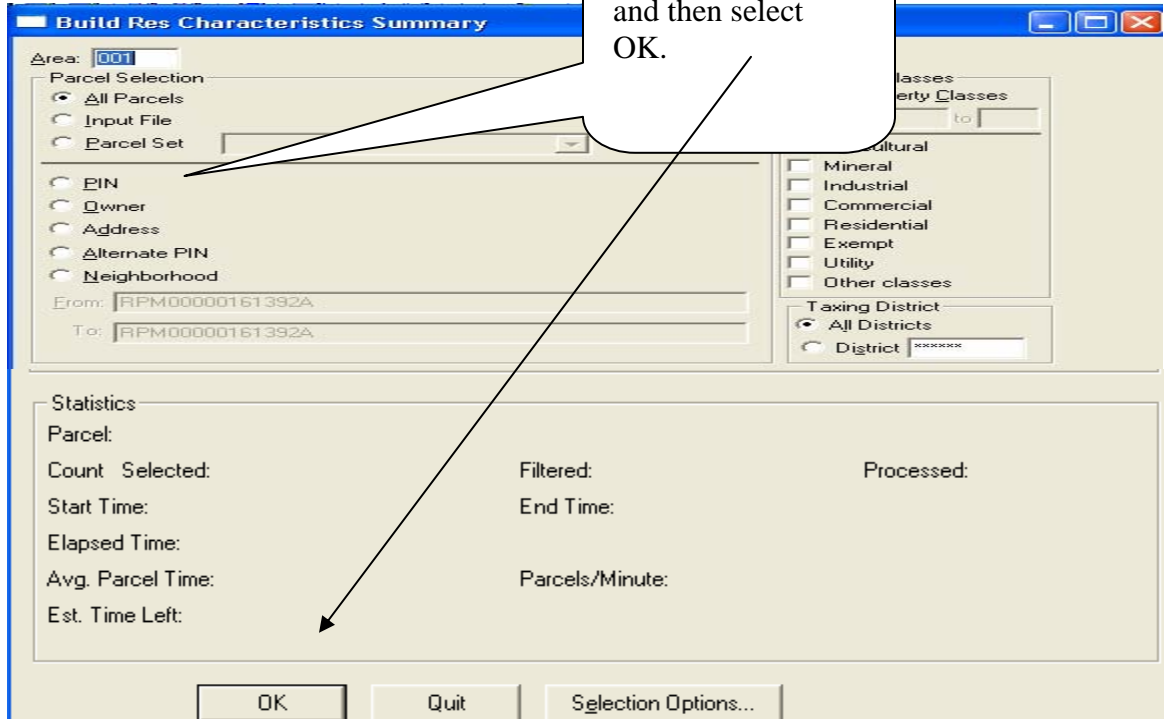
**Comparable Assessments** is a tool for the support of an assessment of a subject property through comparison of the valuations on similar properties.

- ➢ Comparable Assessments is a tool for the support of equity.
- ➢ The program is most effective where the properties involved have a high degree of similarity.
- ➢ Comparable Assessments is designed to be used for residential parcels with one residence.
- ➢ You must first build the Residential Characteristics Summary (rescharsum) Table before using the Comparable Assessments Program.
- ➢ The comparable assessments program is only one tool in the process; therefore the results should be verified before leaning on them in appeals or BOE situations.

## Build ResCharSum Table



Select, Build Res Char Summary table in Utility | Database Maintenance

Select All Parcels, and then select OK.

# Using the Comparable Assessments Program

Open a subject parcel, and then select the COMPS tab.
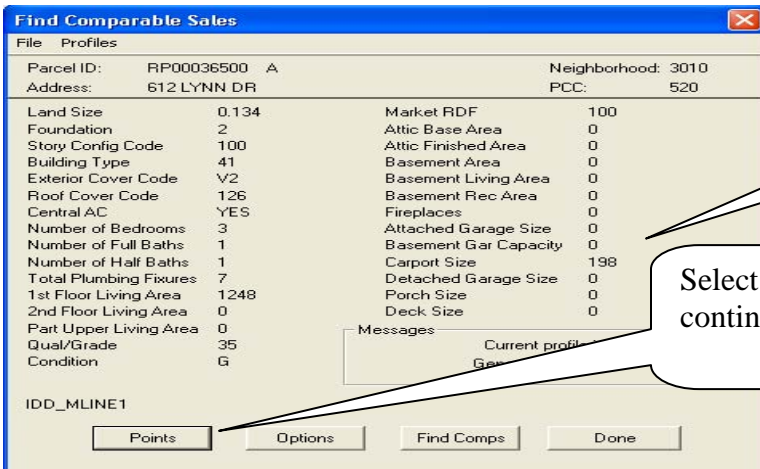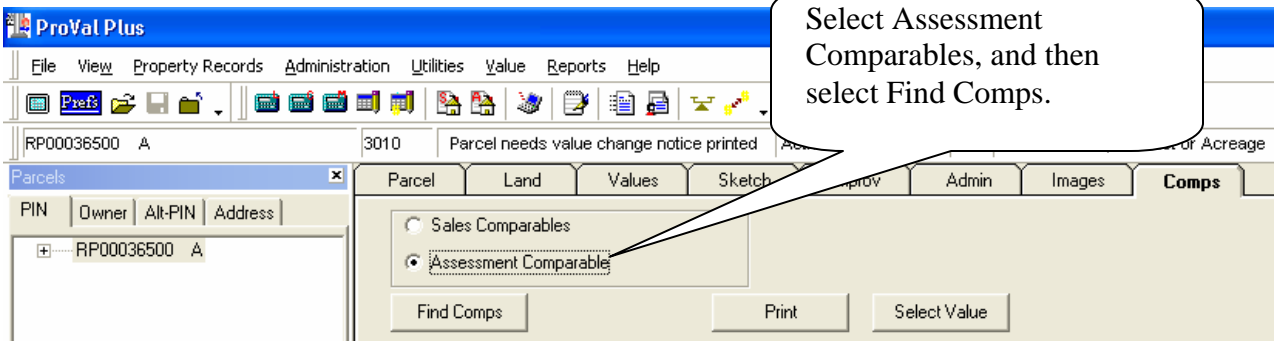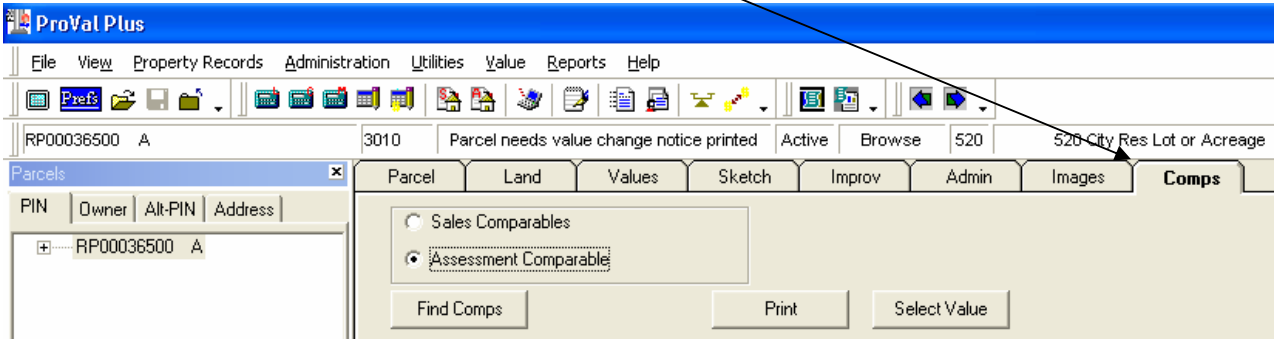


Select Assessment Comparables, and then select Find Comps.

This is the Subject Property information.

Select Points to continue.

Selection **Items** · **Points** · **Adjustments**

Points and Dollar Adjustments Table

| Items | Points | Adjustments | | Items | Points | Adjustments | |
|---|---|---|---|---|---|---|---|
| ☐ Land Value | 50 | $ | 3000 | ☑ Year Built | 10 | $ | 300 |
| ☐ Location Factor | 0 | | | ☑ Qual/Grade | 20 | % | 2 |
| ☐ Story Height | 100 | | | ☑ Condition | 100 | % | 5 |
| ☐ Building Type | 20 | NONE | | ☐ Market RDF | 50 | % | NONE |
| ☐ Exterior Cover Group | 20 | $ | 2 | ☐ Attic Base Area | 0 | $ | 3 |
| ☐ Roof Cover Group | 20 | $ | 2 | ☐ Attic Finished Area | 1 | $ | 7 |
| ☐ Central AC | 50 | $ | 1 | ☐ Basement Area | 1 | $ | 6 |
| ☑ Number of Bedrooms | 100 | $ | 1000 | ☐ Basement Living Area | 2 | $ | 7 |
| ☑ Number of Full Baths | 150 | $ | 3000 | ☐ Basement Rec Area | 1 | $ | 3 |
| ☑ Number of Half Baths | 100 | $ | 1500 | ☐ Fireplaces | 50 | $ | 2000 |
| ☐ Total Plumbing Fixtures | 50 | $ | 500 | ☐ Attached Garage Size | 1 | $ | 10 |
| ☐ Lower Level Living Area | 4 | $ | 20 | ☐ Basement Gar Capacity | 20 | $ | 500 |
| ☐ 1st Floor Living Area | 4 | $ | 20 | ☐ Carport Size | 0 | $ | 5 |
| ☐ 2nd Floor Living Area | 3 | $ | 20 | ☐ Detached Garage Size | 0 | $ | 15 |
| ☐ Part Upper Living Area | 3 | $ | 20 | ☐ Porch Size | 0 | $ | 10 |
| ☑ Total Living Area | 4 | $ | 20 | ☐ Deck Size | 0 | $ | 10 |

Adjustment Condition

◉ Adjustment by selected factors    ○ Adjustment by all factors

[ OK ]    [ Cancel ]

**Items:**  Define the property characteristics that you consider to be significant determinants of comparability.

**Points:**  Are a measure of the significance of the item in determining comparability.  Point values are generally related to the typical unit of measure for the item.
*Example:  Living Area points are points per square foot of living area variation between the subject and the comparable.  Year Built points are points per year of age variation.*

**Adjustments:**    Adjusts the sale price of the comparable to estimate the value of the subject.  Like points, adjustments are generally per typical unit of measure for the item selected.

**Computation of Item Points and Adjustments**

Points are assigned to a comparable property based on the difference in the comparable and the subject property.

Frequently Used Item Points are:
1. **Land Value**
   a. Points per hundred dollar difference in the land value.

2. **Story Height**
   a. Flat number of points for any variation in story height.
   b. No adjustment made for story height.

3. **Central Air Conditioning**
   a. Flat number of points if the subject has AC but comp does not (or vice-versa).
   b. An adjustment per square foot of living area.

4. **Total Plumbing Fixtures**
   a. Points per fixture.
   b. Adjustment per fixture difference.

5. **Total Living Area**
   a. Points per square foot of living are difference.
   b. Adjustment per square foot of living area difference.

6. **Year Build**
   a. Points per year difference.
   b. Adjustment per year difference.

7. **Quality Grade**
   a. Points per numeric code difference as stored in the Grade Factors for Quality.
   b. Percentage adjustment per numeric code difference as stored in the Grade Factors for Quality.

<div align="center">

**EXAMPLE**

</div>



**Average** is numeric code 45
**Average** + is code 48
For a difference of 3 (48-45)

a. If you set the quality points in the Points Screen to be 20 then the Item Points would be 30 (20*3).

b. If the adjustment were set at 2 the item adjustment would be 6%

8. **Condition**
   a. Points per difference in condition increments as stored in the Condition Codes Display section of the System Preferences.
   b. Percentage adjustment per increment difference

<div align="center">**EXAMPLE**</div>



a. AV is the Middle code.
G is the Third Best code.
If this is the difference between the subject and the comparable, there would be a 1 increment of difference in the ratings based on what you entered as the adjustment.

If the points were set at 100, the item points would = 100.

b. If the adjustment were set at 5, then the item adjustment would be 5%.

# Calculation of Points and Application of Adjustments

Point Values for all selected items are accumulated and adjustments applied to the potential comparables. The comparables with the fewest number of points are considered to be the properties most comparable to the subject.

**!TIP** **If you want to get a direct comparison of actual values zero out the adjustments column.**

# Select Parcels for Comparative Analysis

**You can select limits on where and what kind of property you want to pull your comparable assessments from.**

Up to 5 Neighborhoods can be used or select ALL.

If you list neighborhoods, the program looks to the neighborhood the subject is in first if available, then looks elsewhere beginning with the order they are entered. If you are dissatisfied with the results, change the limits and the order of the neighborhoods.

# Profiles

**You can save your points and other limits into a PROFILE that is used every time you or someone wants to find comparables for improvements in this neighborhood. Creating and saving the profile will ensure uniformity in comparable selection criteria and will remove the need to "reinvent the wheel" every time you or someone in the office want to find some comparables.**

**To use the Profile, select it in the Neighborhood General Control**



Your profiles will be in these drop-down menus.

## Perform the Comparable Search

After the Points and Options have been entered and selected, you can now find comparables.



**Find Comparable Sales**

File   Profiles

| Parcel ID: | RP00036500   A | | Neighborhood: 3010 |
| Address: | 612 LYNN DR | | PCC:        520 |

| Land Size | 0.134 | Market RDF | 100 |
| Foundation | 2 | Attic Base Area | 0 |
| Story Config Code | 100 | Attic Finished Area | 0 |
| Building Type | 41 | Basement Area | 0 |
| Exterior Cover Code | V2 | Basement Living Area | 0 |
| Roof Cover Code | 126 | Basement Rec Area | 0 |
| Central AC | YES | Fireplaces | 0 |
| Number of Bedrooms | 3 | Attached Garage Size | 0 |
| Number of Full Baths | 1 | Basement Gar |  |
| Number of Half Baths | 1 | Carport Size |  |
| Total Plumbing Fixtures | 7 | Detached Ga |  |
| 1st Floor Living Area | 1248 | Porch Size |  |
| 2nd Floor Living Area | 0 | Deck Size |  |
| Part Upper Living Area | 0 | Messages |  |
| Qual/Grade | 35 | | Curr... ...is |
| Condition | G | | <...oaded> |

IDD_MLINE1

[ Points ]   [ Options ]   [ Find Comps ]   [ Done ]

> Select the Find Comps

| Porch Size | 0 |
| Deck Size | 0 |

Messages
   Records processed = 22
   5 Sales selected for analysis

> Based on the criteria, 22 parcels were processed and 5 sales have been identified as comparable sales.

Condition        G        <none loaded>

IDD_MLINE1

[ Points ]   [ Options ]   [ Find Comps ]   [ Done ]

> Select Done.

| Parcel | Land | Values | Sketch | Improv | Admin | Images | **Comps** |

○ Sales Comparables
● Assessment Comparable

| Find Comps | | Print | Select Value |

If images exist, they will show here.

| No image available | No image available | No image available | No image available | No image available | No image available |

```
Comparable Assessment Report
Date of Comparison:
                                Subject                         Comp1                        $Adj        Comp2
                                -------------------------       -------------------------    --------    -------------------------
Parcel ID                       RP00036500   A                  RP00100000   A                           RP00100100   A
Location (Street Addresss)      612 LYNN DR                     546 W 3RD ST                             526 W 3RD ST
Neighborhood                    3010                            3190                                     3190
Land Use                        520                             520                                      520
Land Size                       0.134                           0.262                                    0.262
Land Value                                                      17700                                    17700
Sale Date                                                       02/15/2002
Sale Price (Consideration)                                      78500
Site $/sf                                                       62.90

BUILDING DESCRIPTION
Story Height                    1                               1
House Type                      41 Newer conventional 1 story   41 Newer conventional 1 story
Exterior Walls                  Vinyl siding                    Hardboard
Roof Material                   Enamel steel                    Comp sh to 235#
Central AC                      Central Air                     No Central Air
Number of Bedrooms              3                               3
Number of Full Baths            1                               1
Number of Half Baths            1                               1
Total Plumbing Fixtures         7                               7
Lower Level Living Area         0                               0                                        0
First Floor Living Area         1248                            1248                                     1248
Second Floor Living Area        0                               0                                        0
Part Upper Living Area          0                               0                                        0
Total Living Area               1248                            1248                                     1248
Effective Year Built            1970                            1971                          -300       1971
Quality/Grade                   Fair                            Fair                                     Fair
Condition                       G                               G                                        G
Market RDF

FEATURES
Attic Base Area                 0                               0
Attic Finished Area             0                               0
Basement Area                   0                               0
Finished Basement Area          0                               0
Basement Rec Room               0                               0
Fireplaces                      0                               0
Attached Garage Size            0                               0
Basement Garage Capacity        None                            None
Carport Size                    198                             0
Detached Garage Size            0                               0
Porch Size                      0                               0
Deck Size                       0                               0

VALUATION DATA
OB&Y Total                      Yes                             Yes                                      Yes
Adjustment to Subject                                           75600                                    75750
Comparability (Sum of Points)                                   10                                       10
Calculated Subject Value        73000
Appraiser Subject Value         84000
84000
```

Example of a negative adjustment for age.

10 is the sum of points and is considered the closest comparable to the subject. A low points number indicates a high level of comparability.

Once the comparables have been pulled, you can print the comps out into a document.
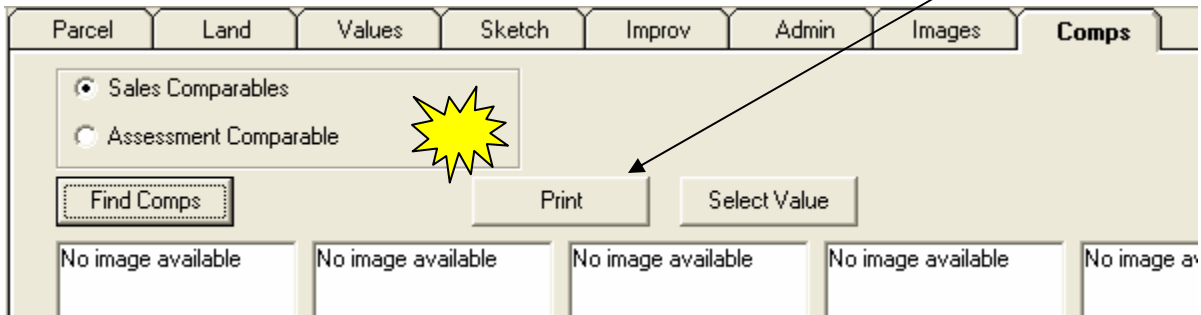


## Select Value to determine Market Value
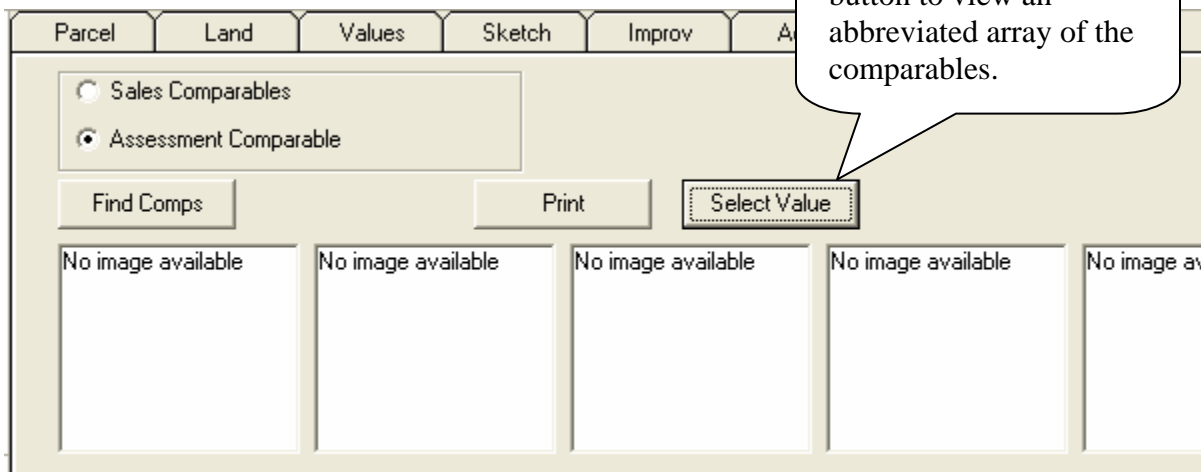


Select the **Select Value** button to view an abbreviated array of the comparables.



**Computed Value Selection**

| | Selected Parcel ID | Sale Date | Adjusted Sale Price | Sum of Points |
|---|---|---|---|---|
| #1 | RP00100000  A | 02/15/2002 | 75600 | 10 |
| #2 | RP00100100  A | | 75750 | 10 |
| #3 | RP00136300  A | | 66870 | 20 |
| #4 | RP00038900  A | | 78162 | 110 |
| #5 | RP00076500  A | | 86300 | 110 |

Subject Parcel ID
RP00036500  A

Computed Subject Value   73000

Appraisal Subject Value

OK          Cancel
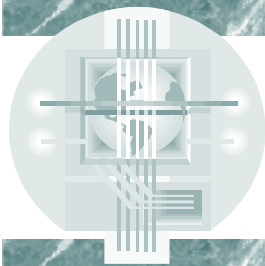
# CAMA ⌨ GUIDE
## SALES AND TRANSFERS

## Sale or transfer…what's the difference?

There can be a variety of reasons for a property to change ownership, including sales, name changes, establishing trusts, etc. In simple terms, the transactions we are concerned with in mass appraisal are those where an owner agrees to 'transfer' ownership to a buyer for a set amount of money, and a deed is recorded formalizing that transfer.

When working within ProVal, you'll see both the terms 'transfer' and 'sale' used. It is important to understand the difference and to know which one you are using when working with analysis tools to study them.

The transaction starts out in ProVal as a transfer. The record of that transfer is an interim way of keeping track of the transaction prior to posting (copying) it to a separate database used to maintain sales information. You wouldn't want to post the sale immediately unless you were certain that no changes had occurred to the property between its last field inspection and the sale date. You would also want to verify the validity of the sale and the sale price first.

Once the transfer has been verified and is ready to be finalized, it becomes a sale. At that time, a historical copy of the sale and the parcel characteristics is made. This is often referred to as a 'snapshot' of the parcel at the time of sale.

An important thing to remember is that a transfer record can change over time, while a sale record is frozen. For example, a sale of bare land is entered in as a transfer, verified and then posted. Six months later, an appraiser fields a new home on the parcel and enters it into ProVal. The transfer record would then show the characteristics of both the land and the house, while the sale record would only show the land data. In this case, the bare land transfer price would be compared to an improved parcel's characteristics.

## What are transfers used for?

After reading the last statement, you might wonder why we use transfers at all. Transfers are a handy analysis tool, easy to query for analysis reports and generally can be relied upon for basic analysis. You just have to remember that the possibility exists that the characteristics of the parcel may not still match the characteristics of the sale.

Analysis of work-in-progress can often be done easier using transfer records than sales records. For example, a ratio study report to test values prior to certification and assessment is a crucial part of the analysis process. You would want to investigate the outliers or suspect ratios to see if something has changed on those parcels since the sale, and remove them from the study if needed.

## Sales posting and analysis

The process of certifying a transfer is known as sales posting. At the time of posting, the sale information and parcel data are copied from the common (parcel) database to a market database. Once posted, nothing can be changed on that sale except its validity codes. For that reason, you need to be certain the sale is valid, and that the characteristics of the parcel are correct.

If a posted sale is later determined to be invalid, it can be changed to invalid in the market database. If something needs changed in the characteristics, the original posting must be invalidated and the sale reposted under a different sales date.

One of the exciting tools in a CAMA system is the ability to perform comparable sales searches. In order to take advantage of this feature, you will have to have your valid sales posted to the market database. Comparable searches will only pull sales from the market database, and does not use transfer records.

## An overview of the transfer/sales process

To understand the differences between sales and transfers, and why it is important to know, lets follow an ownership change through the entire process.

First, a deed is recorded stating that an ownership change has occurred. Someone has to process that deed and determine whether it is the result of a sale, a simple name change, or some other type of change. For this example, we'll assume that we have a warranty deed recorded as the result of an arms-length sale. We'll also assume that the county is not using the State Tax Commission's Technical Support Bureau (TSB) interface program for parcel administration (some steps are different depending on whether administration is handled within ProVal or in the AS400).

| Step # | Using TSB Interface Program | Using ProVal's Administrative Program |
|---|---|---|
| 1 | Deed is recorded showing an ownership change. | Deed is recorded showing an ownership change. |
| 2 | Deed is processed and changes entered in AS400 | Deed is processed and changes entered in ProVal. |
| 3 | Sales verification letter is sent to buyer. | Transfer record is created after changing name. (Sale price is generally not known at this point.) |
| 4 | When sales verification latter is returned, sale information is entered into AS400. | Sales verification letter is sent to buyer. |
| 5 | Transfer record is created in ProVal when interface program is run to download AS400 changes. | When sales verification letter is returned, transfer record is updated with complete information. |
| 6 | Transfer record is updated to include information not downloaded from AS400. | Parcel characteristics are verified to make sure they match what actually sold. |
| 7 | Parcel characteristics are verified to make sure they match what actually sold. | Transfer is posted to market database. |
| 8 | Transfer is posted to market database. | |

## Setting some standards

Before you start entering transfers and posting sales, it is a good idea to establish some standards for how you plan to enter in some of the optional data. Knowing what information you might need later on as you do analysis work will help you to determine what you want to key in during the sales data entry. The more consistent counties in Idaho are as far as what information is entered in each field, the more we will be able to create and distribute standardized reports throughout the state.

The following is a copy of the Transfer Information screen, along with a suggested format for entering data on this screen. It is based in large part on procedures developed in Gem County to store needed information into previously unused fields.



1. Grantor ................................. Seller Name

2. Grantee ................................ Buyer Name

3. Location .............................. Property Address

4. Conveyance form # ........... Use for comments. These comments will show up on the computer in the transfer history area, but don't print on property record card.

5. Screening codes .................. Use to designate validity of transfer for STC and county use
   #1        Y/N  Valid for STC ratio study use
   #2        Y/N  Valid for county analysis use

6. Property class ..................... ProVal's property class code

7. Subclass .............................. Use to designate whether the property is improved or unimproved
   0 (zero)   Improved
   1 (one)    Unimproved

8. Current value ...................... Enter the current total assessed value at time of sale. Don't enter dollar sign, commas or decimals.

9. Transfer type ...................... Use to indicate whether this parcel is part of a multi-parcel sale
   S        Single parcel sale
   M        Master (main) parcel in a multi-parcel sale
   X        Secondary parcels in a multi-parcel sale
   (A multi-parcel or combined sale will have one master parcel and one or more secondary parcels)

10. Primary transfer date..........Date of sale (mm/dd/yyyy)

11. Deed book..........................Deed book number (if used)

12. Page ...................................Page number (if used)

13. Document #.......................Instrument number for deed that created this transfer

14. Secondary transfer date .....(not used)

15. State consideration .............Total sales price. Don't enter dollar sign, commas or decimals.

16. Deed type............................Use to note the type of deed that created this transfer
                                         WD      Warranty deed
                                         QC      Quit claim
                                         (etc.)

17. Transaction type .................(not used)

18. Financing type....................Category combination (see chart below)

19. Buyer-seller relation............Use to note if there is a known relationship between buyer and seller
                                         Fam     Family members
                                         None    No known relationship
                                         (etc.)

20. Adjacent property...............Check this box if this is a multi-parcel (combined) sale

21. Agent/broker......................Use for comments. These comments will not show up on the computer in the transfer history area or on the property record card, but can be printed on custom reports.

22. Phone number ....................Use for comments. These comments will not show up on the computer in the transfer history area or on the property record card, but can be printed on custom reports.

23. Note....................................Use for comments. These comments will not show up on the computer in the transfer history area or on the property record card, but can be printed on custom reports.

24. Seller paid points ................(not used)

25. Personal property ..............Enter the amount of personal property included in the sale. Don't enter dollar sign, commas or decimals.

26. Transfer fee paid.................(not used)

## Category combinations

It can be very useful when creating reports to be able to select or identify parcels based on their category combination. For example, assume that you are writing a report to analyze manufactured homes declared real property on subdivision lots. If you were to try selecting sales based on their property class code (PCC), you could narrow it down to PCC 548, but that would include those on rural tracts and city lots also. By creating a category combination of 1548, you could select that combination and know that your analysis report was only pulling in the sales data that you wanted.

The category combination is entered into the 'financing type' field. It is based on the main land category and the main improvement category, and is four digits long.

The following category combinations should cover most instances of transfers.

| | | | |
|---|---|---|---|
| 01 | Vacant irrigated crop land | 1546 | Resid. subdivision and MH cat. 46 |
| 02 | Vacant irrigated grazing land | 1548 | Resid. subdivision and MH cat. 48 |
| 03 | Vacant dry crop land | 16 | Vacant commercial subdivision |
| 04 | Vacant meadow land | 1638 | Improved commercial subdivision |
| 05 | Vacant dry grazing land | 17 | Vacant industrial subdivision |
| 06 | Productivity forest land | 1739 | Improved industrial subdivision |
| 07 | Vacant forest land | 18 | Vacant other rural land |
| 08 | Speculative homesite | 1840 | Improved other rural land |
| 09 | Patented mineral land | 20 | Vacant residential city lot |
| 10 | Vacant ag homesite | 2041 | Improved residential city lot |
| 1031 | Improved ag homesite | 2046 | Residential city lot and MH cat. 46 |
| 1046 | Ag homesite and MH cat. 46 | 2048 | Residential city lot and MH cat. 48 |
| 1048 | Ag homesite and MH cat. 48 | 21 | Vacant commercial city lot |
| 11 | Vacant recreational land | 2142 | Improved commercial city lot |
| 1133 | Improved recreational land | 22 | Vacant industrial city lot |
| 12 | Vacant rural homesite | 2243 | Improved industrial city lot |
| 1234 | Improved rural homesite | 25 | Condo common area |
| 1246 | Rural homesite and MH cat. 46 | 26 | Condo unit residential |
| 1248 | Rural homesite and MH cat. 48 | 27 | Condo unit commercial/industrial |
| 13 | Vacant rural commercial | 46 | MH cat. 46 sold separate from land |
| 1335 | Improved rural commercial | 49 | MH cat. 49 |
| 14 | Vacant rural industrial | 60 | Improvements on railroad r-o-w |
| 1436 | Improved rural industrial | 61 | Improvements by lessee/not cat. 62 |
| 15 | Vacant residential subdivision | 62 | Improvements on exempt land |
| 1537 | Improved residential subdivision | 65 | MH cat. 65 |

## Step by step instructions

The following instructions are based on a county that is using ProVal's administrative system for parcel maintenance. If your county is using the TSB interface program, your procedures will vary slightly.

The process starts when the owner name is changed in ProVal's administrative program. The person making the change will see the following dialog box:
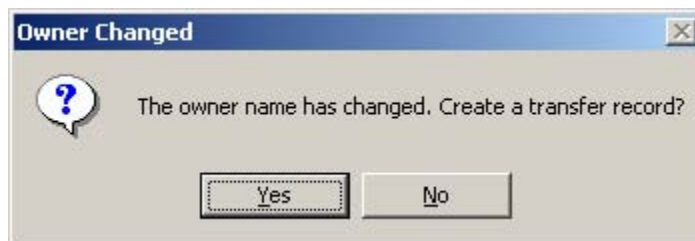


If the name change is not the result of a sale, we'd click "No." For this example, we'd click "Yes". The following screen comes up, with some of the information already filled in.

Idaho State Tax Commission
County Support Division        Revised 07/01/2003
**CAMA GUIDE**        Page X-5

At this point, the sale price and details will probably not be known. You will be creating a transfer record that will be completed at a later date.

The only required field at this stage is the **primary transfer date.**

Later on, when the details of the sale are known, you would open the above screen again (open the parcel in administration, then choose 'Update Transfer History' and select the transfer you want to update). At this point, you would fill in this screen based on the standards discussed previously.

Next, the parcel characteristics need to be checked to make sure they match what actually sold. If the parcel data and the sale match, the sale is ready to post.

If not, you may need to change the parcel data temporarily while you post the sale. For example, if you have a sale that is for bare land, but the appraisal now has a home on it, you would want to void the residential record, post the sale, and then come back and recover the voided residential record. Most of the time, the sale and appraisal will match and this will not be necessary.

At this point, you are ready to post the sale to the market database. This is done by selecting 'Analysis' from the main ProVal screen, then 'Sales Verify & Post to Sales DB', then 'Residential Sales Post'. (Batch posting is an option, but this should be explored first as there could be some unexpected consequences. Individual posting is recommended.)
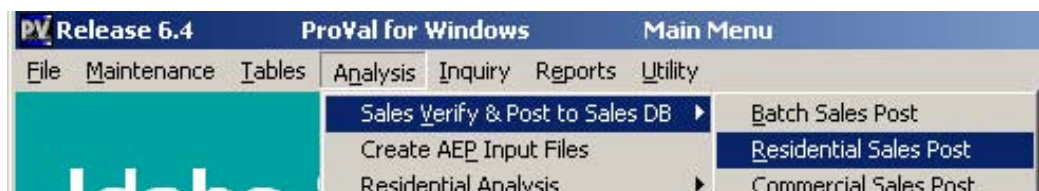
Open the parcel you want to post. This will bring up the following screen listing all unposted sales for that parcel. Highlight the one you want to post and click on 'Post'.
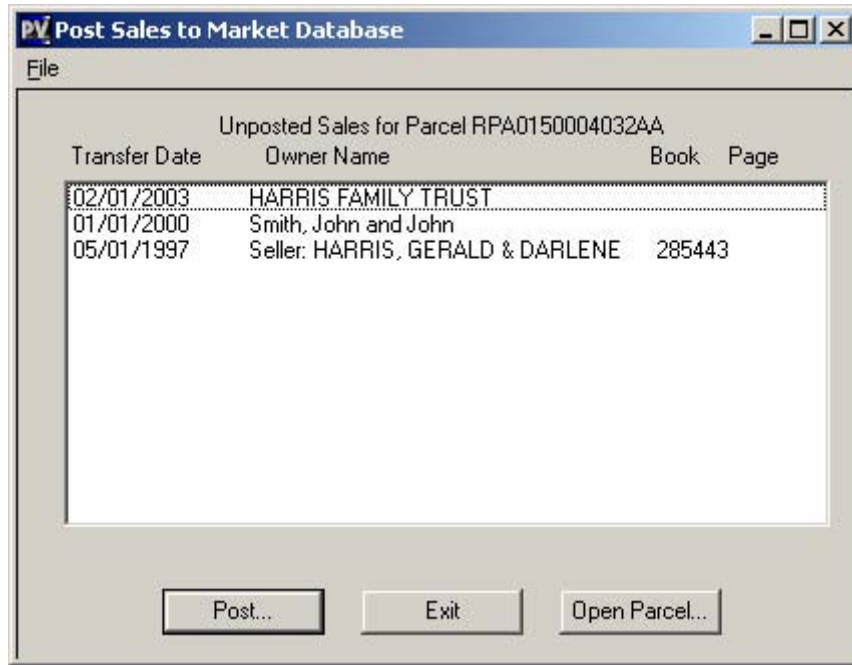


This will bring you to the following screen, which has to be filled in prior to posting the sale.
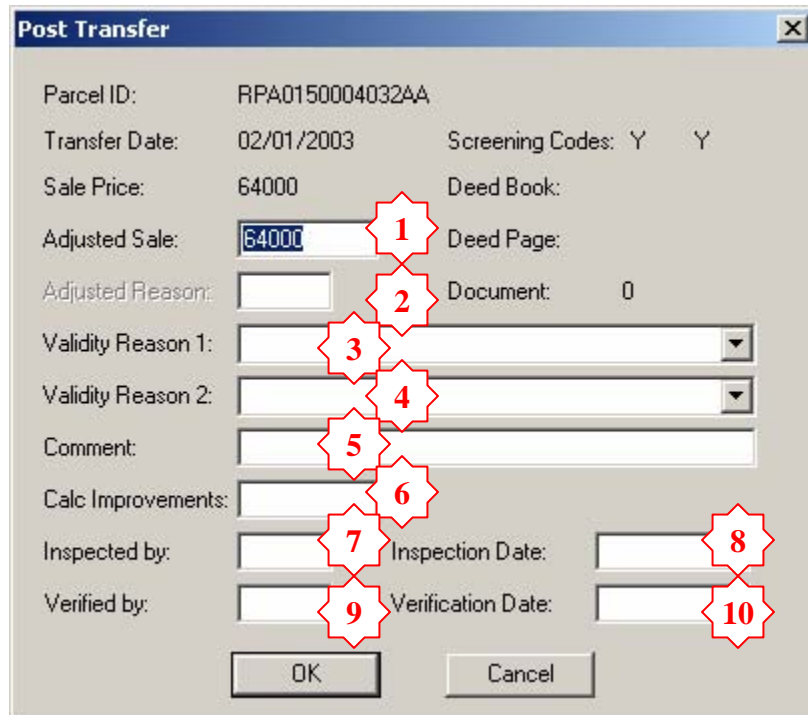


1. Adjusted sale .......................If your investigation has determined that the reported sale price on the transfer record was incorrect, enter the adjusted sale price here. Otherwise, leave this field blank. If you enter an adjusted sale price, you **must** enter a reason code for the adjustment.

2.  Adjusted reason ...................If you entered an adjusted sale price above, you must now enter a code for the adjustment reason. This is a two-character field.

3.  Validity reason #1 ..............Use to designate validity of sale for STC ratio study use
    Y/N      Valid for STC ratio study use

4.  Validity reason #2 ..............Use to designate validity of sale for county analysis use
    Y/N      Valid for county analysis use

5.  Comment ............................Use for comments

6.  Calc improvements.............You will usually not put a value in this field. This is used only if you know exactly how much of the sales price was for the improvements.

7.  Inspected by .......................Who physically inspected the property?

8.  Inspected date ....................When was the property physically inspected?

9.  Verified by .........................Who verified and posted the sale?

10. Verified date .......................When was the sale verified and posted?

You are now ready to post this sale to the market database. *Once you post this sale, you cannot make any changes to the sale record, except to invalidate it.* After this step is done, you can make corrections or changes only by invalidating this sale in the market database and reposting the sale with a different sale date.

## Things to consider

At the time of this writing, the sales program in ProVal is used only for residential properties. Commercial sales should not currently be posted.

Combined (multi-parcel) sales are not adequately handled in ProVal. You can and should still enter combined sales in the transfer part of these instructions, but we recommend that you not post those sales at this time. Make sure you designate the 'master' and 'secondary' parcels in the 'transfer type' field. You should also create a memo on each parcel involved in the combined sale and list all the parcel numbers involved.

If you have not been posting residential sales in the past, we recommend that you begin to do so. ProVal Plus makes working with comparable sales even easier than in the past, but will only be useful if you have posted sales to work with. If you haven't posted in the past, you might consider starting with sales from this point on, and then make a determination of how far back to go and work on posting those older sales. If you are in a county with a significant number of sales and seldom have to go back farther than a year for analysis work, there is probably little use in posting sales any further back than that. If you typically have to look at sales back a couple of years for analysis, that is probably a good indication of how far back to post sales. *Keep in mind that the farther back you go, the more likely it is that the parcel characteristics may no longer match what actually sold.*

Batch posting can be done, but should only be considered on groups of parcels that you are certain are ready for posting. You would not want to batch post all unposted sales, for example, unless you have verified the transfer information and parcel characteristics on every one of them. Be very careful about using batch posting to make sure you don't post sales you don't want to or aren't ready to post.

# ProVal Plus®

Comparable Sales

Comparable Sales is a tool for estimating Market Value and a tool for support of the value conclusion.

  ➢ The comparable sales program is designed to be used for residential parcels which have only a single residence.
  ➢ The program is most effective where the properties involved have a high degree of similarity.
  ➢ The comparable sales program is dependent on a Market Database with quality data.
  ➢ Converted Data is not considered to be reliable for posting.  Make sure the characteristics have been verified.

## Using the Comparable Sales Program

All sales must have been fielded, the characteristics verified and then Posted to the Market Database.

> Make sure the dwelling information is correct and accurate.

**Transfer Information**

| | |
|---|---|
| Grantor: | Seller: KELLEY |
| Grantee: | Woody |
| Location: | |

Conveyance form #

Transfer type  S

Screening codes:  #1  Y  #2  Y

**Deed information**

Primary transfer date  05/01/1996          Secondary transfer date  01/01/1900

Deed Book  189645     Page          Document #  189645

Deed type  2                                    Stated consideration  121500

**Transaction Information**

Transaction type

Financing type

Buyer-Seller relation

Adjacent Property

Agent/broker

Phone number          Note  0  6

Seller paid points  0

Personal property  0

Transfer fee paid  0

OK          Cancel

> Make sure the transfer information is correct and accurate.

**Applications**

- Maintenance
- Reports
- Analysis
  - Sales Verify & Post to Market Database
    - Batch Res Sales  Post (Market Database
    - Residential Sales Post (Market Database
    - Commercial Sales Post
    - Invalidate Posted Sales (Mkt Database)
  - Create Statistical Extract
  - Residential Analysis
- Tables

Memos

> To Post a sale, select Residential Sales Post.

**Open Parcel**

- ● PIN          RP00244406  A
- ○ Owner:
- ○ Address:
- ○ Alternate PIN:

OK          Select          Cancel

> The parcel you have open, should show in the PIN box.

**Post Sales to Market Database**

File

Unposted Sales for Parcel RP00244406   A

| Transfer Date | Owner Name | Book | Page |
|---|---|---|---|
| 05/01/1996 | Seller: KELLEY | 189645 | |

Post...    Exit    Open Parcel...
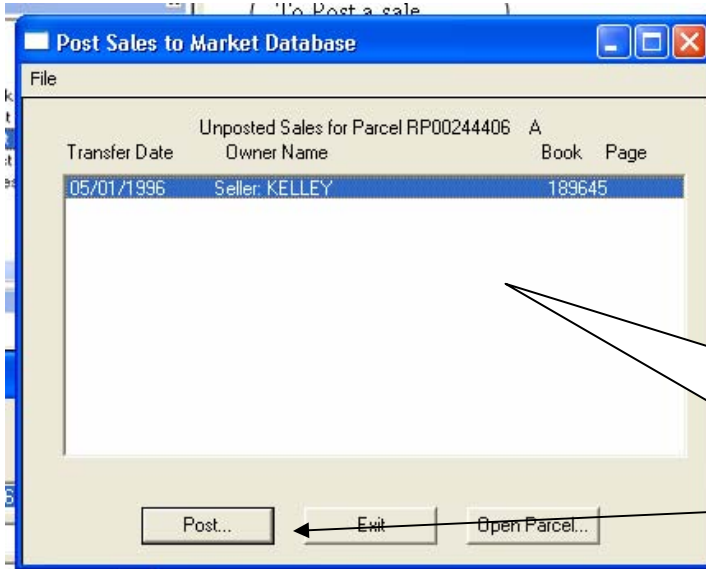
Select the un-posted sale by highlighting it.

Then select POST.

---

**Post Transfer**

| | |
|---|---|
| Parcel ID: | RP00244406   A |
| Transfer Date: | 05/01/1996    Screening Codes:  Y    Y |
| Sale Price: | 121500    Deed Book:    189645 |
| Adjusted Sale: | 121500    Deed Page: |
| Adjusted Reason: |    Document:    189645 |
| Validity Reason 1: | 0000- VALID for Ratio Study |
| Validity Reason 2: | 0000- VALID for Analysis |
| Comment: | |
| Calc Improvements: | 103440 |
| Inspected by: | TM    Inspection Date:  12/05/2004 |
| Verified by: | MT    Verification Date:  12/06/2004 |

OK    Cancel

Enter validity reasons, improvement value and inspection information.

---

**Post Sales to Market Database**

File

Unposted Sales for Parcel RP00244406   A

| Transfer Date | Owner Name | Book | Page |
|---|---|---|---|

Post...    Exit    Open Parcel...
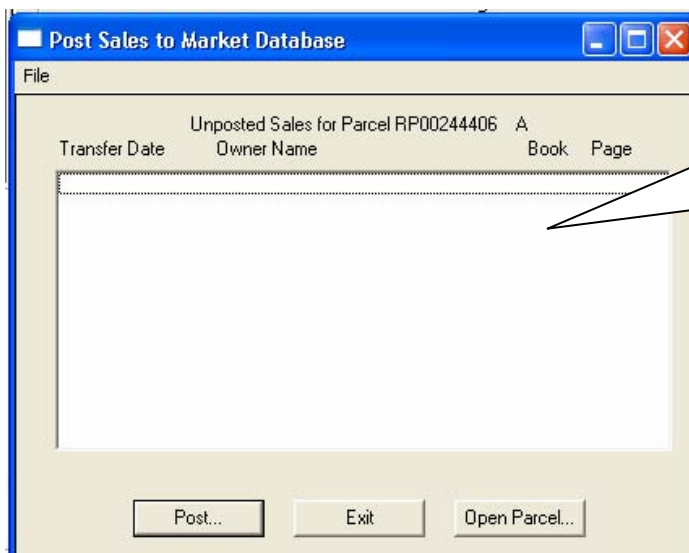
The sale will be removed after it has been posted.

4

# Using the Comparable Sales Program

Open a subject parcel, and then select the COMPS tab.





Select Find Comps.
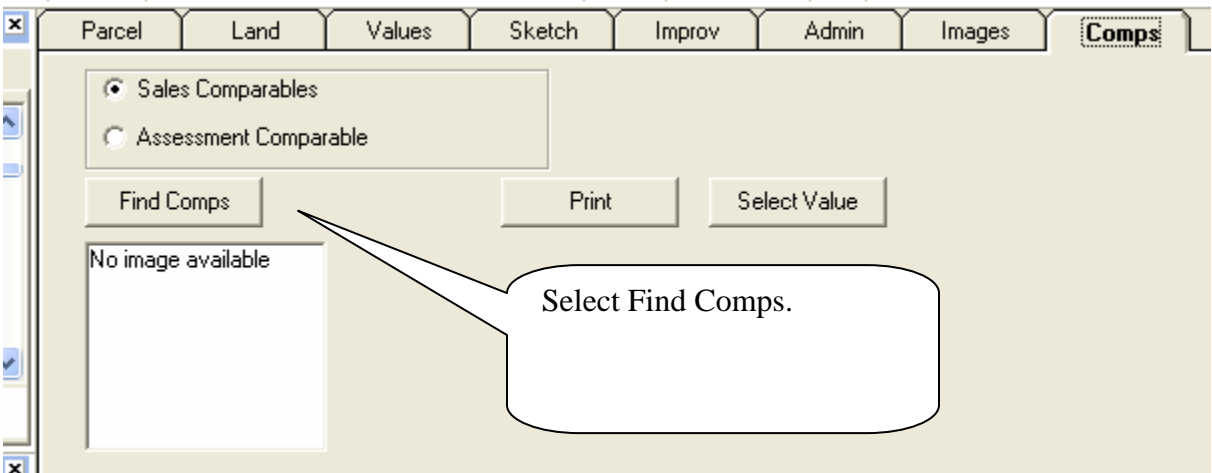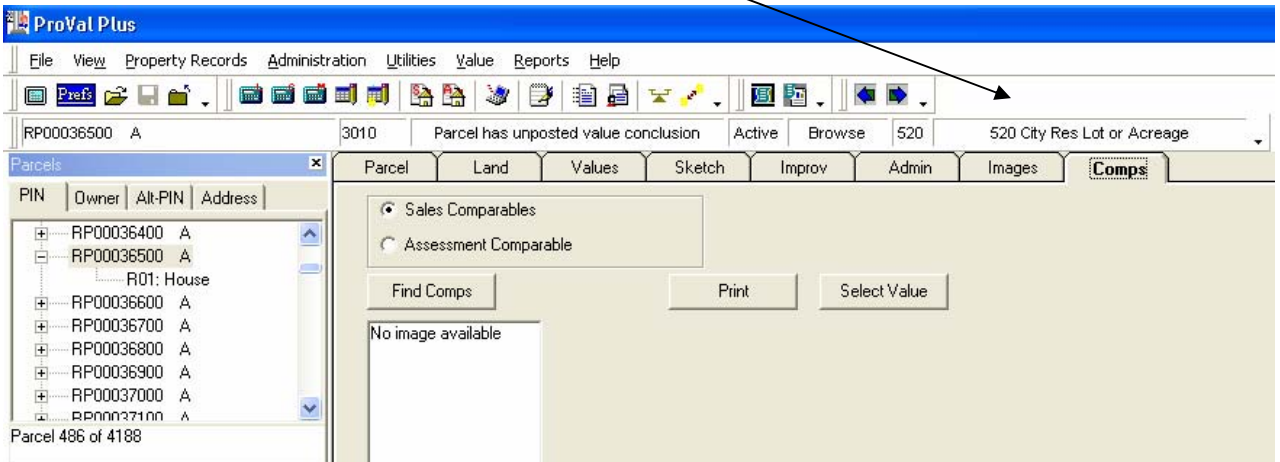
**!TIP  You can also access the Comparables Program by going to Value | Comparable Sales.**



This is the Subject Property information.

Select Points to continue.

Selection **Items**  •  **Points**  •  **Adjustments**

**Po‥s and Dollar Adjus‥nents Table**

| Items | Points | Adjustments | Items | Points | Adjustments |
|---|---|---|---|---|---|
| ☐ Land Value | 1 | $ 100 | ☑ Year Built | 10 | $ 300 |
| ☐ Location Factor | 0 |  | ☑ Qual/Grade | 20 | % 1 |
| ☑ Story Height | 100 | NONE | ☑ Condition | 100 | % 3 |
| ☑ Building Type | 30 | | ☐ Market RDF | 50 | % NONE |
| ☑ Exterior Cover Group | 20 | $ 2 | ☐ Attic Base Area | 0 | $ 3 |
| ☑ Roof Cover Group | 20 | $ 2 | ☐ Attic Finished Area | 1 | $ 7 |
| ☑ Central AC | 50 | $ 1 | ☐ Basement Area | 1 | $ 6 |
| ☑ Number of Bedrooms | 100 | $ 1000 | ☐ Basement Living Area | 2 | $ 7 |
| ☑ Number of Full Baths | 150 | $ 3000 | ☐ Basement Rec Area | 1 | $ 3 |
| ☑ Number of Half Baths | 100 | $ 1500 | ☑ Fireplaces | 10 | $ 1000 |
| ☑ Total Plumbing Fixtures | 50 | $ 500 | ☑ Attached Garage Size | 1 | $ 10 |
| ☐ Lower Level Living Area | 3 | $ 20 | ☐ Basement Gar Capacity | 20 | $ 500 |
| ☑ 1st Floor Living Area | 4 | $ 20 | ☑ Carport Size | 1 | $ 5 |
| ☑ 2nd Floor Living Area | 3 | $ 20 | ☑ Detached Garage Size | 1 | $ 15 |
| ☐ Part Upper Living Area | 2 | $ 15 | ☐ Porch Size | 0 | $ 10 |
| ☐ Total Living Area | 4 | $ 20 | ☐ Deck Size | 0 | $ 0 |

Adjustment Condition
● Adjustment by selected factors        ○ Adjustment by all factors

[ OK ]        [ Cancel ]

**Items:**  Define the property characteristics that you consider to be significant determinants of comparability.

**Points:**  Are a measure of the significance of the item in determining comparability.  Point values are generally related to the typical unit of measure for the item.
   *Example:  Living Area points are points per square foot of living area variation between the subject and the comparable.  Year Built points are points per year of age variation.*

**Adjustments:**    Adjusts the sale price of the comparable to estimate the value of the subject.  Like points, adjustments are generally per typical unit of measure for the item selected.

**Computation of Item Points and Adjustments**

Points are assigned to a comparable property based on the difference in the comparable and the subject property.

Frequently Used Item Points are:
1. **Land Value**
   a. Points per hundred dollar difference in the land value.

2. **Story Height**
   a. Flat number of points for any variation in story height.
   b. No adjustment made for story height.

3. **Central Air Conditioning**
   a. Flat number of points if the subject has AC but comp does not (or vice-versa).
   b. An adjustment per square foot of living area.

4. **Total Plumbing Fixtures**
   a. Points per fixture.
   b. Adjustment per fixture difference.

5. **Total Living Area**
   a. Points per square foot of living are difference.
   b. Adjustment per square foot of living area difference.

6. **Year Build**
   a. Points per year difference.
   b. Adjustment per year difference.

7. **Quality Grade**
   a. Points per numeric code difference as stored in the Grade Factors for Quality.
   b. Percentage adjustment per numeric code difference as stored in the Grade Factors for Quality.

<div align="center">

**EXAMPLE**

</div>



**Average** is numeric code 45
**Average** + is code 48
For a difference of 3 (48-45)

a. If you set the quality points in the Points Screen to be 20 then the Item Points would be 30 (20*3).

b. If the adjustment were set at 2 the item adjustment would be 6%

8. **Condition**
   a. Points per difference in condition increments as stored in the Condition Codes Display section of the System Preferences.
   b. Percentage adjustment per increment difference

**EXAMPLE**



a. AV is the Middle code.
G is the Third Best code.
If this is the difference between the subject and the comparable, there would be a 1 increment of difference in the ratings based on what you entered as the adjustment.

If the points were set at 100, the item points would = 100.

b. If the adjustment were set at 5, then the item adjustment would be 5%.

# Calculation of Points and Application of Adjustments

Point Values for all selected items are accumulated and adjustments applied to the potential comparables. The Comparables with the fewest number of points are considered to be the properties most comparable to the subject.

**!TIP  If you want to get a direct comparison of actual values zero out the adjustments column.**

# Select Parcels for Comparative Analysis

**You can select limits on where and what kind of property you want to pull your comparable sales from.**

Up to 5 Neighborhoods can be used or select ALL.

If you list neighborhoods, the program looks to the neighborhood the subject is in first if available, then looks elsewhere beginning with the order they are entered. If you are dissatisfied with the results, change the limits and the order of the neighborhoods.

**Select Parcels for Comparative Analysis**

Comparable Neighborhoods: 1: [ ]  2: [ ]  3: [ ]  4: [ ]  5: [ ]   ☑ All

Total Living Area: 1248   Range Min %: [80]   Max %: [120]
Year Built:        1970   Range Minus: [30]   Plus: [30]

Oldest Sale Date        [01/01/1999]
Newest Sale Date        [01/01/2003]   ☐ Newest is Today

☐ Omit Parcels with Land Influence     ☐ Analyze Residual Building Values
☐ Omit Parcels with Major Influence    ☐ Use Subject as Comparable of Sold
☐ Omit Parcels with Excess Features

Story Configuration
● All configurations
○ 1 Story
○ 1 1/2 Story
○ 2 Story
○ 2 1/2 Story
○ Split Level
○ Bi-level

Property Class
520
☐ Range [520] to [520]

Selection Control
● All Validity codes        ○ By Validity Reason
☐ Validity Reason 1   [ ▼]
☐ Validity Reason 2   [ ▼]

Messages
Enter parameters and click OK

[ OK ]   [ Cancel ]   ☑ Profile is Active

# Profiles

**You can save your points and other limits into a PROFILE that is used every time you or someone wants to find comparables for improvements in this neighborhood. Creating and saving the profile will ensure uniformity in comparable selection criteria and will remove the need to "reinvent the wheel" every time you or someone in the office want to find some comparables.**

**To use the Profile, select it in the Neighborhood General Control**



ProVal Appraisal Neighborhood Control Table Maintenance

Neighborhood: Number: [ ]  Open  Next  Previous  New   Effective Date
(1) Name: [ ]                                      12/10/2004   Change
                                                                Today

(2) Area: Number: [ ]    Name: [ ]

(3) County [ ]           Last Updated: 99/99/9999   Updated By: user-id

(4) District Number: [ ]   Record Valid Between (inclusive):
                           Activation Date: 99/99/9999   Inactivation Date: 99/99/9999
(5) Political
Sub-division: [ ]          Inactivate Reason: [ ]

(6) Map: [ ]

                                    Profiles
  ○ Platted   ○ Unplatted
                           (7) Assessment: <None>                    ▼

                           (8) Sales Comp: General City Profile      ▼

                           (9) Geographic / Area Boundaries

Your profiles will be in
these drop-down menus.

                           CLVC Comments and Directions OR Other User Notes

                                                               Switch to Land
   Inactivate    Cancel    Save    Quit                        Switch to Res Impr
                                                               Switch to Com Impr

# Perform the Comparable Search

After the Points and Options have been entered and selected, you can now find comparables.



Select the Find Comps



Based on the criteria, 22 parcels were processed and 5 sales have been identified as comparable sales.

Select Done.

Parcel | Land | Values | Sketch | Improv | Admin | Images | **Comps**

⦿ Sales Comparables
○ Assessment Comparable

[ Find Comps ]     [ Print ]     [ Select Value ]

If images exist, they will show here.

| No image available | No image available | No image available | No image available | No image available | No image available |

```
Comparable Sales Report
Date of Comparison:
                                Subject                      Comp1                        $Adj      Comp2
                                -------------------------    -------------------------    ------    -------------------------
Parcel ID                       RP00036500  A                RP00100000  A                          RP00020800  A
Location (Street Addresss)      612 LYNN DR                  546 W 3RD ST                           404 W 12TH ST
Neighborhood                    3010                         3190                                   4780
Land Use                        520                          520                                    520
Land Size                       0.134                        0.262                                  0.345
Land Value                                                   17000                                  17800
Sale Date                                                    02/15/2002                             11/22/2000
Sale Price (Consideration)                                   78500                                  89000
Site $/sf                                                    62.90                                  71.31

BUILDING DESCRIPTION
Story Height                    1                            1                                      1
House Type                      41 Newer conventional 1 story  41 Newer conventional 1 story        43 Newer conventional 1 sto
Exterior Walls                  Vinyl siding                 Hardboard                              T 111 plywood
Roof Material                   Enamel steel                 Comp sh to 235#                        Comp sh to 235#
Central AC                      Central Air                  No Central Air                         No Central Air
Number of Bedrooms              3                            3                                      3
Number of Full Baths            1                            1                                      2
Number of Half Baths            1                            1                                      0
Total Plumbing Fixtures         7                            7                                      8
Lower Level Living Area         0                            0                                      0
First Floor Living Area         1248                         1248                                   1248
Second Floor Living Area        0                            0                                      0
Part Upper Living Area          0                            0                                      0
Total Living Area               1248                         1248                                   1248
Effective Year Built            1970                         1971                         -300      1973
Quality/Grade                   Fair                         Fair                                   Fair
Condition                       G                            G                                      AV
Market RDF

FEATURES
Attic Base Area                 0                            0                                      0
Attic Finished Area             0                            0                                      0
Basement Area                   0                            0                                      0
Finished Basement Area          0                            0                                      0
Basement Rec Room               0                            0                                      0
Fireplaces                      0                            0                                      2
Attached Garage Size            0                            0                                      624
Basement Garage Capacity        None                         None                                   None
Carport Size                    198                          0                                      0
Detached Garage Size            0                            0                                      0
Porch Size                      0                            0
Deck Size                       0                            0

VALUATION DATA
OB&Y Total                      Yes                          None                                   Yes
Adjustment to Subject                                        78200                                  92505
Comparability (Sum of Points)                               10                                     130
Calculated Subject Value        84000
Appraiser Subject Value         80190
79190
```

Example of a negative adjustment for age.

Example of how the comparable value is adjusted to the subject based on adjustments.

10 is the sum of points and is considered the closest comparable to the subject. The next closest is 130.

Once the comparables have been pulled, you can print the comps out into a document you can show to the property owner.  You may also consider inserting a printed comps sheet into the parcel folder for future reference.



## Select Value to determine Market Value



Select the **Select Value** button.



**Computed Value Selection**

| | Selected Parcel ID | Sale Date | Adjusted Sale Price | Sum of Points |
|---|---|---|---|---|
| #1 | RP00100000  A | 02/15/2002 | 78200 | 10 |
| #2 | RP00020800  A | 11/22/2000 | 92505 | 130 |
| #3 | RP00177500  A | 07/13/2001 | 90220 | 144 |
| #4 | RP00049200  A | 07/24/2000 | 86898 | 212 |
| #5 | RP00029800  A | 12/28/2001 | 87060 | 222 |

Subject Parcel ID     Computed Subject Value  84000

RP00036500  A

Appraisal Subject Value  840

OK          Cancel
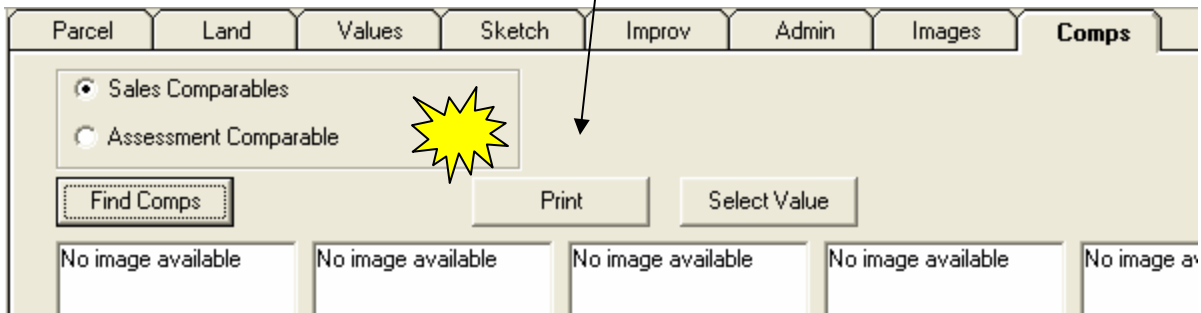
If this is satisfactory, select OK, then save the parcel.

# Select the Market Value per Comparable sales in correlation of value.

**Correlation of Value**

| Valuation Method | Total | Land Mkt | Improvements | Model % |
|---|---|---|---|---|
| ○ Cost models | 80190 | 18100 | 62090 | N/A |
| ○ Market models | 80190 | 18100 | 62090 | N/A |
| ◉ Comparable sales | 84000 | 18100 | 65900 | N/A |
| ○ Income | 0 | 0 | 0 | N/A |
| ○ Trended | 0 | 0 | 0 | N/A |

**Reconciliation**
○ User Entered      0     17100     -17100
○ Override          ☑ Override land value
○ Calculation Model

**Assessed Values**
Land:   18100
Imp:    65900
Total:  84000

Land Use:   0

OK     Cancel

**REMINDER:** You can only do this after you have saved the parcel! If not the Comparable Sales information will not show.

Select OK after selecting the Comparable sales option.

**Warning**

The valuation method has changed
The parcel will have to be reposted

Continue to change the method?

Yes     No

This is letting you know the valuation method is changing, and the new value will need to be posted.

| | Min | Median | | Current Qualified Transfer | |
|---|---|---|---|---|---|

| nge | Certified Value Eff Date | | % Change | Worksheet **Comp. Sales** | |
|---|---|---|---|---|---|
| | 01/01/2003 | | | | |
| | 01 | | | | |
| 0 | 17100 | | 6 | 18100 | |
| 0 | 62090 | | 6 | 65900 | |
| 0 | 79190 | | 6 | 84000 | |
| | | | | | |
| 0 | 17100 | | 6 | 18100 | |
| 0 | 62090 | | 6 | 65900 | |
| 0 | 79190 | | 6 | 84000 | |
| | | 0 | | | 0 |
| | | 0 | | | 0 |

| | Last Update | Date Valued | Update User ID |
|---|---|---|---|
| | 05/31/2002 | 12/10/2004 | MANATRON |
| | 06/25/2003 | 12/10/2004 | MANATRON |

> This is the Summary of values on the Values Tab. Note the COMP. Sales method is listed as the valuation method.

> Also note that the dwelling cost information is still listed in the Buildup tab. This could be confusing, so pay attention to the valuation method on the Summary tab.

tory   Buildup

p

| oor | Size | Finished | Value |
|---|---|---|---|
| .0 | 1248 | 1248 | 59280 |

| ase Value | 1248 | 1248 | 59280 |
|---|---|---|---|
| Crawl/Slab | | | 0 |
| Total Base Value | | | 59280 |
| Row Type Adjustment | 100 % | | 59280 |
| Base Rate | | | $47.50 |
| Subtotal Adj. & Features | | | 7240 |
| Sub-total, 1 unit | | | 66520 |
| Sub-total, all units | | | 66520 |
| Subtotal Garages & Porches | | | 2880 |
| Total Adjusted Base Value | | | 69400 |
| Grade Adjustment | 92 % | | (-5550) |
| Grade Adjusted Value | | | 63850 |
| Adjusted Base Rate | | | $51.16 |
| Physical Depreciation | 7 % | | 4470 |
| Functional Depreciation | 0 % | | |
| External Depreciation | 0 % | | |
| Total Depreciation | | | 4470 |
| RCN Less Depreciation | | | 59380 |
| Relative Desirability Factor | 100 % | | 0 |
| Location Adjustment | 100 % | | 0 |

Property Card: **House**

Adjustments & Features
| | |
|---|---|
| Frame/Siding/Roof/Dormers | 1550 |
| Loft/Cathedral | 0 |
| Interior Finish | 0 |
| Basement FInish | 0 |
| Heating | 0 |
| Cooling | 2030 |
| Plumbing | 3350 |
| Fireplaces | 0 |
| Other Features | 310 |
| Extra Living Units | 0 |

| | |
|---|---|
| Attached/Integral Garage | 0 |
| Carport | 0 |
| Basement Garage | 0 |
| Porch/Deck/Patio, etc. | 2880 |

| ID | Type | Year Built | Eff Year | Cond | Grade | Net Valu |
|---|---|---|---|---|---|---|
| D | DWELL | 1970 | 1970 | G | Fair | 59380 |
| G01 | ICP | 1970 | 1970 | G | Fair | 1600 |
| 01 | UTLSHED | 1970 | 1970 | AV | Fair | 610 |
| 02 | FENCERES | 1970 | 1970 | AV | Avg | 500 |

After posting, the value based on the sales analysis will show on the Parcel tab. Note also that the Valuation Method will reflect the Comp. Sales approach.

**INVALIDATE A POSTED SALE**

If you have determined that a Posted Sale is no longer a valid sale, you can **invalidate** the sale in the Market Database by changing the validity reason(s).

Make the Invalidate Posted Sales option in Analysis.

Enter the Parcel ID.

Select the sale (transfer) you want to invalidate.
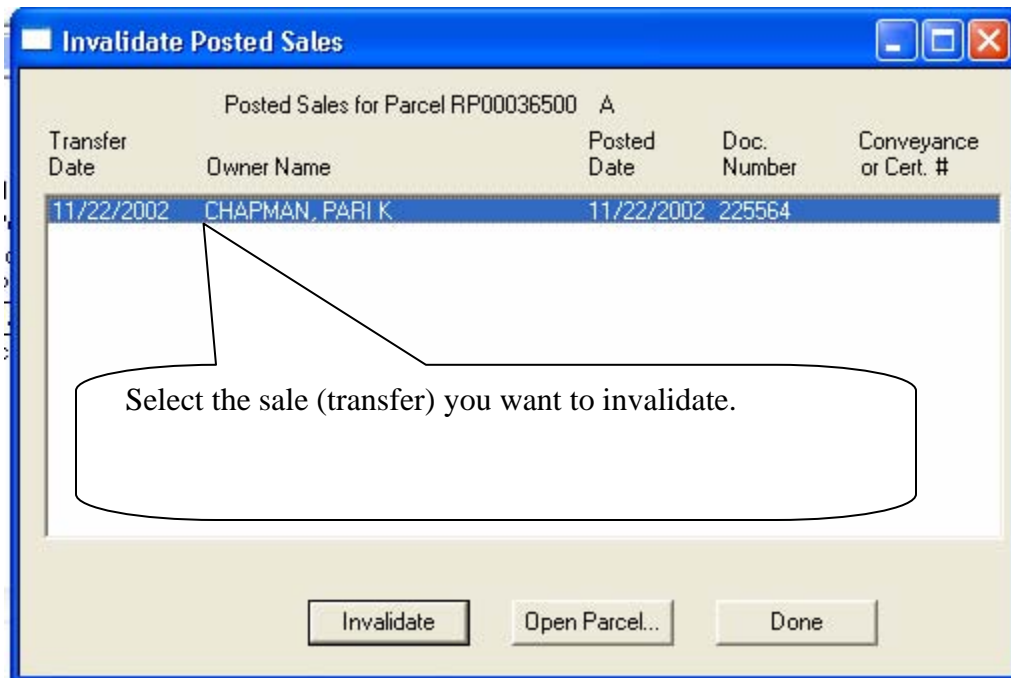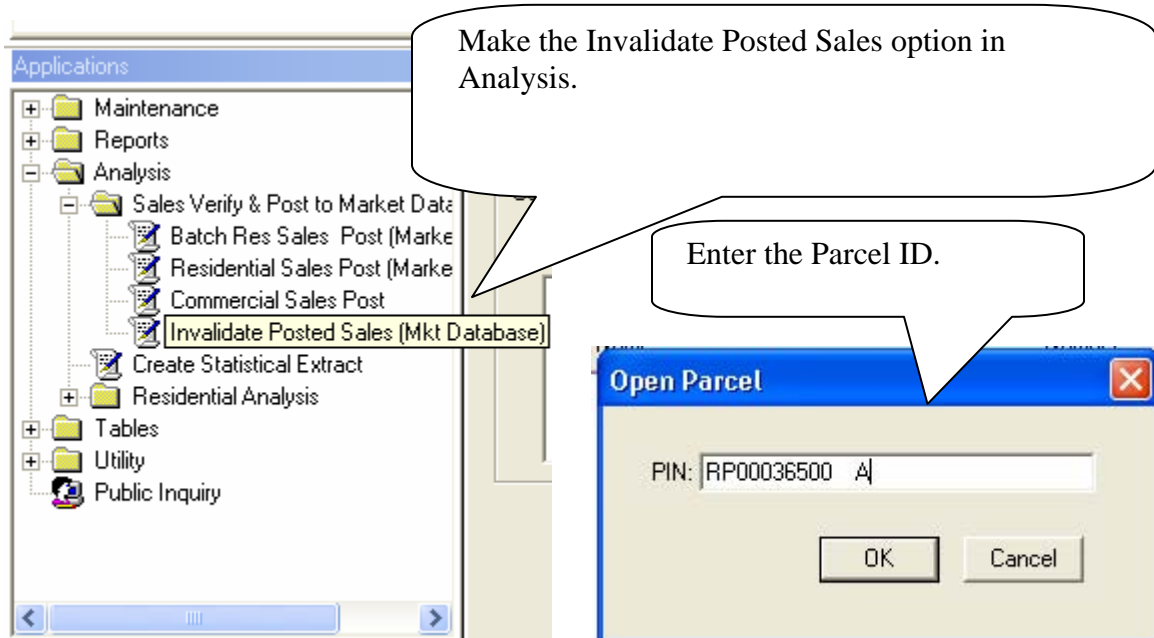
**Edit Validity Codes**

Parcel ID: RP00036500 A

Transfer Date: 11/22/2002

Original Validity Code 1: 0000- VALID for Ratio Study

Original Validity Code 2: 0000- VALID for Analysis

Validity Reason 1: 0003- NOT VALID for Ratio

Validity Reason 2: 0001- NOT VALID for Analysis

Comment:

Inspected by: tm

Verified by: mt

Inspection Date: 01/01/2002

Verification Date: 01/01/2003

OK    Cancel    Clear Posting

> Change the Validity Reason Codes to reflect Invalid transfers.

**Invalidate Posted Sales**

Posted Sales for Parcel RP00036500 A

| Transfer Date | Owner Name | Posted Date | Doc. Number | Conveyance or Cert. # |
|---|---|---|---|---|
| 11/22/2002 | CHAPMAN, PARI K | 11/22/2002 | 225564 | |

Invalidate    Open Parcel...    Done

> Select DONE.

**Done**

Save changes?

Yes    No

> Save your changes if you are finished.

# ProVal Plus

## Using the Market DB
## The Gem County Model

# Comparable Sales Information

In Gem County we have been working on putting together the comp sales program for since 2001 and we are finally seeing some decent results. The best word of advice is to post only those sales that have clean data. In other words, make sure that the sales you are posting are not only "good sales", but also have the absolute correct ProVal residential characteristics data entered. The sales that get posted to the market database wind up being the comps that are used to compare back to your subject property. Therefore, it is imperative that you only post those sales that you want to be used as comps. Some may suggest that you should always post ALL sales; this does not seem to be the best approach based on our experience.  A good question to always ask yourself when you are posting sales is, *"would you want that house and sales price to show up as a comparable house when discussing the property owner's subject house at your desk"?*

Below you will find a list of posting guidelines that have worked for our jurisdiction. Remember that they are written from the perspective of a small county with the luxury of a large number of sales and also a large amount of new construction (comparatively speaking).

# General Posting Guidelines

- **We do NOT post bare land sales.**
- **ProVal will not let you post sales with more than one RO record.** This is somewhat contrary to the way the state initially directed us to sketch outbuildings. In the beginning, we entered the house and a garage on the first RO record and then any remaining outbuildings were added to additional RO records. We decided several years ago to put <u>all</u> improvements on the first RO record on all market value categories (if possible). Farms we still split up on as many RO records as it takes.
- **Only post market value category sales.** We do not post any Ag exempted sales (Cat 10's). We only post those categories that are market value based. (12-34, 15-37, 20-41, etc.)
- **Do not post sales that have more than one dwelling on the parcel.** I am pretty sure the sales posting program will not let you do this anyway.
- **Do not post any Mobile Home sales.** Why? I don't really know, but we have not done it, so someone out there needs to test it for the rest of us. I am not sure if you can even post a MH sale.
- **Do not post sales that only have converted data**. Once again, I can not stress enough the importance of only posting those sales that have clean data. We make sure and visit every sale and attempt to verify ALL the Residential Characteristic details including the sketch as well as conditions of the sale before posting.
- **Do not post what I call "deficient information" sales**. We do not post sales that have a significant percentage difference between the assessed value and sale price. Obviously, you are going to need to come up with your own policy on this one, but just remember, would you want that particular house and sales price to show up as a comparable house when discussing a similar subject house. Just to give you an idea for comparison purposes, we posted 88 of the 123 improved sales in the city limits of Emmett reported for the 2003 Ratio Study.

MAKE SURE ALL APPRAISERS ARE ON THE SAME PAGE IN REGARD TO DATA COLLECTION. For example, is the condition you use the same for everyone and all like properties. What condition do you put on a new house? Do you use AVG, GOOD, VG, or EX? If you are not consistent you can wind up with condition adjustments of up to 15% on your comparables property when in reality it is identical to the subject. This can happen if one appraiser puts a new house in AVG condition and another appraiser puts a similar new house in VG or EX condition. The debate will always continue as to what condition to use on a new house and I am not going to answer that question, just make sure that whatever you pick as policy, that everyone is consistent.

Below is a screen shot of the point adjustments and dollar adjustments that we use inside the city limits with NO land adjustments.



**1.** The condition adjustment of 5% equates to a 5% adjustment for each step in condition. For example, the difference between an AVG and GOOD is 5% and the difference between an AVG and VG is 10%.

**2.** The Quality/Grade adjustment is a completely different calculation. The calculation is determined by the difference in numbers between each Grade. For example, in our county the Fair Grade is the equivalent to a number 35 and an AVG is a number 45. So the calculated adjustment difference between a Fair and Average grade is (1 X (45-35)) = 10%. If the Adjustment was 2% rather than 1%, the difference between a Fair and Average grade would be 20%. (2 X (45-35)).

 **! TIP**  I would strongly suggest not using the fireplace adjustment or the AC adjustment because of the way ProVal establishes these conditions.

Below is a screen shot of the point adjustments and dollar adjustments that we use inside the city limits WITH a land adjustment. It is the same except that the very first item, "Land Value" is now checked.

**Points and Dollar Adjustments Table**

| Items | Points | Adjustments | Items | Points | Adjustments |
|---|---|---|---|---|---|
| ☑ Land Value | 1 | $ 100 | ☑ Year Built | 25 | $ 400 |
| ☐ Location Factor | 0 | | ☑ Qual/Grade | 50 | % 1 |
| ☑ Story Height | 100 | NONE | ☑ Condition | 75 | % 5 |
| ☑ Building Type | 40 | | ☐ Market RDF | 50 | % NONE |
| ☑ Exterior Cover Group | 10 | $ 1 | ☐ Attic Base Area | 0 | $ 3 |
| ☑ Roof Cover Group | 10 | $ 1 | ☐ Attic Finished Area | 1 | $ 7 |
| ☐ Central AC | 30 | $ 1 | ☐ Basement Area | 1 | $ 6 |
| ☑ Number of Bedrooms | 100 | $ 1000 | ☑ Basement Living Area | 10 | $ 12 |
| ☑ Number of Full Baths | 150 | $ 3000 | ☐ Basement Rec Area | 1 | $ 3 |
| ☑ Number of Half Baths | 100 | $ 1500 | ☐ Fireplaces | 10 | $ 1000 |
| ☑ Total Plumbing Fixtures | 30 | $ 500 | ☑ Attached Garage Size | 1 | $ 10 |
| ☐ Lower Level Living Area | 3 | $ 20 | ☐ Basement Gar Capacity | 20 | $ 500 |
| ☐ 1st Floor Living Area | 4 | $ 20 | ☑ Carport Size | 1 | $ 5 |
| ☐ 2nd Floor Living Area | 3 | $ 20 | ☑ Detached Garage Size | 1 | $ 15 |
| ☐ Part Upper Living Area | 2 | $ 20 | ☐ Porch Size | 0 | $ 10 |
| ☑ Total Living Area | 4 | $ 20 | ☐ Deck Size | 0 | $ 0 |

Adjustment Condition
◉ Adjustment by selected factors        ○ Adjustment by all factors

[ OK ]        [ Cancel ]

Below is a screen shot of the options that we use.

**Select Parcels for Comparative Analysis**

Comparable Neighborhoods:  1: [    ]  2: [    ]  3: [    ]  4: [    ]  5: [    ]    ☑ All

Total Living Area: 1340   Range Min %: [80]   Max %: [120]
Year Built:       1974    Range Minus: [30]   Plus: [30]

Oldest Sale Date        [01/01/2003]
Newest Sale Date        [11/03/2004]   ☑ Newest is Today

☐ Omit Parcels with Land Influence      ☐ Analyze Residual Building Values
☐ Omit Parcels with Major Influence     ☐ Use Subject as Comparable of Sold
☐ Omit Parcels with Excess Features

Story Configuration
◉ All configurations
○ 1 Story
○ 1 1/2 Story
○ 2 Story
○ 2 1/2 Story
○ Split Level
○ Bi-level

Property Class
520
☐ Range [520] to [520]

Selection Control
○ All Validity codes        ◉ By Validity Reason
☑ Validity Reason 1  [0000- VALID for Ratio Study  ▼]
☑ Validity Reason 2  [0000- VALID for Analysis  ▼]

Messages
Enter parameters and click OK

[ OK ]        [ Cancel ]        ☑ Profile is Active

The options screen allows you to widen or narrow your comps search. You can limit the year built, size, and sale date on the properties you want to call comparable to your subject. This is also where you define what you want to call comparable neighborhoods. In Gem County we set up a neighborhood for every subdivision. Oops, probably not the best idea, but live and learn. Because of this, we have some neighborhoods that are very small, consequently we must check ALL in the comparables neighborhoods box to get meaningful results.

 This has all been developed by trial and error over time and even though Gussie (Valley County appraiser) thinks I spend all my time playing on the computer on this kind of stuff, she is mistaken.☺ I am sure that once different people get a look at this and start working with it, they (YOU) will find better point combinations and dollar adjustments so please pass them on. Send them on to me and I will update my information. There are several areas that do not work very well already. For example, houses with basements do not make very good subjects or comps with the points and dollar adjustments I use and I am not sure why. If you find a better combination let me know. We do not use Attics in defining and sketching residential property but you might so you may need to include that item as a point and dollar adjustment. Also, I seem to have better luck using total living area, which does not include finished basement or finished attic, rather than breaking it down between 1$^{st}$, 2$^{nd}$, and upper floors. Another option that was discussed at the ProVal conference was filling in the point columns but then zeroing out all the dollar adjustments. I had never thought of that option and it may actually be a better place to start from. This would allow you to pick the best comparable sales from the points selection but no dollar adjustments to the sales price would be made to the comps. It sounded like this was a common way other users of the comp sales program set up their adjustments.

One last thing …For Now… If you post your sales, get everything set up, and start running the comp program, and you wind up getting land adjustments that are very large because some of the land values on your comps are not correct or are missing completely, don't panic. This was something that kept us from making land adjustments, thus rendering the program almost useless, for over a year. All I am going to say is that this is a known ProVal issue and it is correctable. If you get this far and it is a problem, contact either Tony Magnelli or I. If you have any other questions don't hesitate to call or Email.

**!TIP**  Those sales we decide we are going to post we put a "P" in the note field on the transfer history page. This way we can run a simple crystal report and pull all of our posted sales.

GOOD LUCK

Greg Himes
415 E Main St.
Emmett, ID 83617
Phone 365-2982 - Fax 365-2163
assessor@co.gem.id.us

# 10.
# County Quality Control Model

It would be nice if there were a standard office model that we all could follow, but in reality it will be up to each individual county to examine their work flow and how to integrate ProValPlus into it.  This document will highlight the main points that you should focus on in order to ensure the final product is produced as efficiently as possible.

Three main things to consider when examining the flow of data in your office.

1. Who fields the appraisal?
2. Who does the data entry?
3. Who checks the work?

1. Who fields the appraisal?  Easy enough to answer, it could be a contracted appraiser, a staff appraiser or appraiser trainee.

2. Who does the data entry?  Not so easy to define.  Some counties have support staff to data enter the appraisals, but in most cases the appraiser IS the support staff, and they do their own data entry.

3. Who checks the work?  Again, there is not a template to use, so it is up to you to create and *enforce* office procedures where appraisals are checked and then rechecked as they go through the cycle from being FIELDED to CERTIFIED in ProVal.

You should put into place checks in your system to ensure that the following *minimum* criteria are adhered to:

1. The parcel must be assigned to a valid NEIGHBORHOOD and it must have a PROPERTY CLASS.
2. Neighborhoods must have the correct cost MODEL SERIAL NUMBERS entered.
3. COMMERCIAL PARCELS must be assigned to a commercial neighborhood.
4. On converted data, make sure the VALUE ADJUSTMENT has been removed during the sketch process.
5. Make sure all improvements have an EFFECTIVE YEAR, QUALITY CLASS/GRADE, CONDITION and CORRECT OCCUPANCY CODE. Commercial improvements must also have a WALL HEIGHT.
6. The land neighborhood must be using a LAND MODEL with the proper LAND TYPES AND METHODS already set up.
7. The INSPECTED BY & APPRAISED BY information must be completed.
8. The parcel must have only *one* RY MEMO indicating the review year for the parcel.  All other memos like BY99 and LY99 for example, and other RY memos are to be deleted.
9. The parcel should not have any ALLOCATIONS that are 98, 99 or 97.
10. (If necessary), verify that MEMOS for occupancy or new construction purposes have been properly set on the parcel.

Some counties find it helpful to print checklists that the staff can tape to their computer monitors listing specific items that they should verify on each appraisal before sending it forward. (Depending on the role of the individual these checklists will vary.)

**SAMPLE**

- ✓ The parcel must be assigned to a valid NEIGHBORHOOD and it must have a PROPERTY CLASS.
- ✓ The VALUE ADJUSTMENT has been removed on the improvement(s).
- ✓ All Improvements have an EFFECTIVE YEAR, QUALITY CLASS/GRADE, CONDITION and CORRECT OCCUPANCY CODE.
- ✓ If commercial, the WALL HEIGHT is entered or estimated.
- ✓ The INSPECTED BY & APPRAISED BY information is complete
- ✓ The parcel has only one RY memo. BY, LY and all other RY memos have been removed.
- ✓ 97, 98&99 ALLOCATIONS have been properly assigned.
- ✓ Parcel has MEMOS for occupancy or new construction.

**TIP**

**You may also find it useful to create routing slips that are attached to the appraisal that have the checklist items on them. See PVP Documentation - 03c sample QC routing slip.doc**

After those minimum criteria are met, there are many other areas where the quality and accuracy of the appraisal will depend on the quality and accuracy of the data entered. Some of those areas are:

1. If your county is using HOUSE TYPE FACTOR models, make sure that:
   A. The proper house type factor model is entered in the neighborhood.
   B. The proper house type has been selected for the dwelling.
2. Make sure the proper DWELLING CHARACTERISTICS have been entered like air conditioning, heating systems, roof and exterior wall types, bathroom fixtures and room counts.
3. If using SOUND VALUE options, make sure the correct sound value option is selected, particularly for outbuildings where there are many sound value options to choose from.
4. Pay close attention to where any USER OVERRIDES for depreciation have been entered. Verify these with the appraiser if necessary.
5. For Commercial Improvements, make sure all floor areas have been defined.
6. Correct placement of improvements to Child Parcels after splitting.

Having your staff on the same page is very important. Some counties help maintain a level of synchronicity by holding regular team meetings to address issues surrounding "grey" areas like:

1. Making adjustments to land with SITE CHARACTERISTICS.
2. Using MARKET RDF'S.
3. Attaching IMAGES to parcels. Who does it and when?
4. CLASSING mobile homes, buildings and outbuildings.
5. Handling "NO VALUE" outbuildings and other improvements. To sketch or not to sketch?
6. Using NOTES with sketches.
7. Creating and using MEMOS.
8. Calculating a PERCENT COMPLETE for an improvement.
9. Determining the EFFECTIVE AGE of an improvement.
10. Entering BUILT IN'S and FEATURES for dwellings and other improvements.
11. Identifying possible new or emerging neighborhoods.

The use of checklists will help in maintaining quality control over your appraisals, but you should also designate someone to run weekly* edit reports that will also help you keep your data as clean as possible. The following Crystal Reports should be run weekly, and they can be found in your Manatron\Reports\User folder on your server.

## PROVAL PLUS WEEKLY EDIT REPORTS

- TSB1630C-Allocations Analysis-Parcels Checked to be Posted
- TSB1674C-Allocations_DWELL and MH with no value
- TSB1680C-Allocations_Improvements 1-Posted
- TSB1690C-Allocations_Improvements 2-Posted
- TSB1710C-Allocations_Land 1-Posted
- TSB1720C-Allocations_Land 2-Posted
- TSB2450-Duplicate Parcel Numbers Edit
- TSB2580C-Extensions Edit-Posted
- TSB2720C-Group Code Land to Improvement Edit
- TSB3170C-Inspection Dates Edit – Posted
- TSB4455C-Parcels In-Activated With Active Extensions
- TSB4650C-Parcels Checked to be Posted Without Memo(s)
- TSB5200C-Parcels Needing Review
- TSB5400C-Parcels Not Checked-Select Neighborhood
- TSB6500C-Parcels Win Invalid Neighborhoods
- TSB6900-Parcels With Multiple Review Years
- TSB7200C-Parcels With Review Year memos Without Being Priced
- TSB8650C-Reconciliation Table Analysis-Parcels Checked to be Posted
- TSB9696-Value Ad Entry Listing

*We recommend these edits to be run on a weekly basis, however depending upon variables like the time of year, size and workload of your County etc., you may find that you need to run some or all of these only on a bi-weekly or even a monthly basis. ***The important issue is that they do get run and the data cleaned up regularly.***

## REFERENCE MATERIAL

User Documentation has been provided to you by TSB, and it can be found on your server in the Manatron\ProvalPlus\Documentation folder.

ProVal has also vastly improved the HEIP function of their program, in the past I have not recommended using it but now it seems to be ok. Not great but ok.

You can also find tips and answers to frequently asked questions on our web site http://tax.idaho.gov/propertytax/pt_cama.htm.

# SAMPLE ROUTING SLIP

PARCEL ID_____

| | TASK TO BE COMPLETED | INITIALS/ DATE |
|---|---|---|
| | The parcel is assigned to a valid neighborhood | |
| | The inspected by information is completed | |
| | The appraised by information is completed | |
| | All improvements have an effective year, a condition and quality/class grade. | |
| | The value adjustment has been removed | |
| | **MEMOS** | |
| | The most current RY memo is the only RY memo on the parcel. | |
| | There are not any LY or BY memos on the parcel. | |
| | Occupancy memo has been added if necessary | |
| | New Construction memo has been added if necessary | |
| | **ALLOCATIONS** | |
| | There are not any 97,98 or 99 allocations | |
| | Allocations all equal 100% | |
| | **COMMERCIAL IMPROVEMENTS** | |
| | If commercial, it is assigned to a commercial neighborhood | |
| | If commercial, the buildings all have a wall height | |

## IMAGE DIRECTORY SETUP
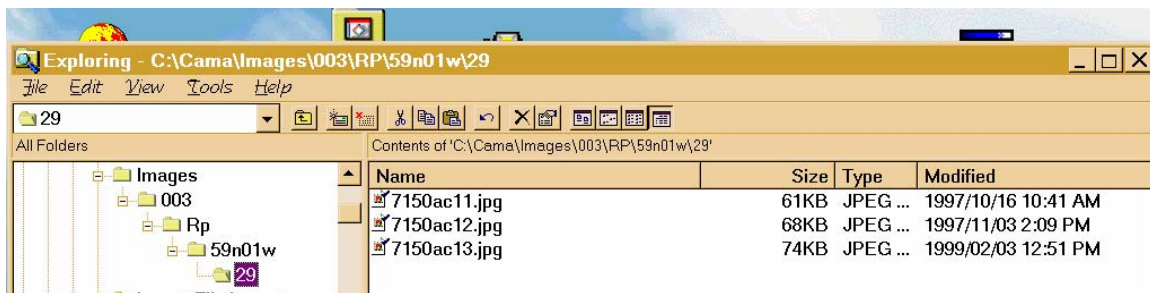


**This is an example of the Image directory "tree" that will need to be setup so that photo's can be stored.**

**Example:** **Area** **001**
**Parcel Number** **RP|59N01W|29|7150A**
**Property Record** **C1** **(In ProVal, C01)**
**Picture Number** **1** **(Can be 1 thru 9)**

- **Images is the main directory & should reside on your network drive, *within the Cama directory*.**
- **001 is a sub-directory that needs to be assigned here to relate to the area number used in ProVal, which is always 001.**
- **Rp is a sub-directory *associated with the sub-directory*. This represents the first two characters of the parcel number type (RP, MH. LR, etc.).**
- **The next 6 characters of the parcel number is the *name of the sub-directory associated with the RP,MH,LR,* etc. sub-directory.**
- **The next two characters represents the *sub-directory associated with the 6 character sub-directory* described in the previous step.**
- **Within the preceding 2 character sub-directory, *are the individual picture files* (jpg files). They should be named as follows:**
  - **The first 5 characters are *the remaining characters of the parcel number*.**
  - **The next two charters *are the property record id assigned in ProVal (if C01 in ProVal, then it is C1 here; if R01 in ProVal, then R1 here).***
  - **The last character *represents the picture number*. You can have up to 9 pictures. Right now, ProVal will only display one picture per parcel. If you have 3 pictures, it will display picture 3.**