# End of Year Maintenance

As the assessment year winds down, there are several steps that can be done as part of your end of year maintenance. Prior to bridging to your administration file, here are some recommended tasks to ensure the process runs smoothly.

- Make a backup of your DAT folder. This can done by simply creating a copy of the DAT folder. Make sure to name it something other than DAT, like DAT1104.

- From the **Utility Menu**, under **System Administration Menu**, lock out all users and make sure they are OFF UNIVERS and run the Check and Repair DB. (Please refer to the last issue of the newsletter for detailed instructions). This will ensure the integrity of your database.

- Run cost and income on the file. You may want to limit the parcels to be valued by using a SelFil like the one on page 5. It uses the last update field as the criteria. Set the date to be prior to the end of the last assessment date to ensure that all parcels saved in the last year are included. If errors are generated, correct them and continue.

- Using a SelFil and Quick Print like the ones on page 5, check for values of $0 (or some other number). The Quick Print Report will print the Parcel Number and Value Flag to easily identify the parcels.

- Print a change report (or do an export and open it in MS Excel). You can use the SelFil on page 5. This will only work if you moved your current to prior last year.

- If you are a Connecticut Assessor, you can now run the Connecticut Value Abstract from the **Valuation Menu**, under **Execute Value Procedure**. This procedure will create a report of assessments by State Code or, totals by State Code. See page 5 for an example of the totals only report.

- If using Market Approach for the final value answer, use the **Move Market to Current** Procedure from the **Valuation Menu**, under **Execute Value Procedure**. Use Sel Fil "ALL PARCELS CARD 1" (usually Sel Fil 001). Make sure Read/Write mode is selected. This will move whatever value is in Market into the Current Value fields.

- Preserve your file by creating an archive backup. If there were no changes made to the file since you made your backup from the previous step, use it. If not, create another copy of the DAT folder. Name it something meaningful and store it in a safe location.

- As the first step of the new assessment year, **Move Current to Prior** by selecting the procedure from the **Valuation Menu**, under **Execute Value Procedure**. This will preserve your 04 list values as prior values for the 05 list. Use Sel Fil 001 again.

- If you are using the Current Owner to track transfers after the assessment date, you should **Move Current Owner to Owner of Record** by selecting the procedure from the **Valuation Menu**, under **Execute Value Procedure**.

Now you're ready for another year!

End of Year Maintenance

SelFil for running cost on residential parcels that have been saved since the given date. Make sure to use the appropriate Sel Fil when costing commercials.

SelFil and Quick Print Report for zero values.

SelFil for value change report.