



Iowa Department of  
**REVENUE**  
Property Tax Division

# BPTC and Unit IDs

March 30, 2016

**THANK YOU!!**



# Today's Agenda

- Review BPTC & Unit ID Process
- What is a Unit?
- Retiring BPTC Unit IDs
- Creating New BPTC Unit IDs
- Uploading a Unit ID Generator File
- Downloading a Unit ID Generator File
- Timing
- Questions



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# BPTC & Unit IDs

# Business Property Tax Credit (BPTC)

- Credit against tax
- State funded \$125 million
- Property classified as commercial, industrial and railroad
- Commercial or industrial component of Dual Class property
- Apply to local assessor
- Exclusions
  - Section 42 housing unless owner has opted out of special valuation procedure



# Who Can Apply?

- Initial Application
  - Any person
  - Does not need to be property owner
- Reapplication when ownership changes
  - Property Owner
- Keep track of application date
  - Needed in case of corrections

# BPTC Application Date Changes

Assessment Year 2015

Received on or before March 15, 2016

Assessment Year 2016

Due on or before July 1, 2016

426.3 (2)(a) (1) & (2)



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**What is a Unit?**

# Unit Configuration

- Within the same county
- Same classification (commercial, industrial, RR)
- Same ownership
- Separate item on tax list
- Common use and purpose
- Contiguous parcels



# Contiguity

- Share common boundary
- Within same building or structure, regardless of boundary
- Buildings on Leased Land (like wind turbines)
  - Contiguous as long as the land upon which they sit is contiguous regardless of the land ownership





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**Retiring BPTC Unit IDs**  
**Creating New BPTC Unit IDs**

# When to Retire BPTC Unit IDs

## 1. Events:

- a) Change of ownership
- b) Change of classification to an ineligible classification

## 2. Splits or combines of property (administrative functions)

## 3. Follow your vendor instructions regarding timing and reconciliation.

# When to Create New BPTC Unit IDs

1. For new applications
2. Splits or combines of property  
(administrative functions)



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# Uploading a Unit ID Generator File

# localgovexchange.iowa.gov



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### Sign In



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### Create Account



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# New Look



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[UNIT ID](#)

[DATA ELEMENTS](#)

[REPLACEMENT CLAIM](#)

### Important Notices

Watch this area for important dates, notices, and events.



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# Select Unit ID



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# To Upload Unit ID Generator File



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## Upload A Business Property Tax Credit (BPTC) Application Unit ID Generator File For Assessment Year

The BPTC Application Unit Number Generator file is used to assign a BPTC Unit Number for each record sent. After uploading a file, it will be processed and you will receive an email notification when it is ready for pickup or review.

To upload a BPTC Application Unit Number Generator file, click "Select File" below.

[Select File](#) [? Unit Number Generator Instructions](#)

[My Files](#)

### Upload Tips

- Maximum upload size is 500MB
- File must be either CSV or ZIP
- File name should be 40 characters or less and contain your county number, file type name (UnitFile) and filing year.

[? Upload Help](#)

html5 runtime

Iowa.Gov | Tax.Iowa.Gov | Policies v2.0.1.4

# To Check Status of a File You Uploaded



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[Select File](#)

[? Unit Number Generator Instructions](#)

[My Files](#)

### Upload Tips



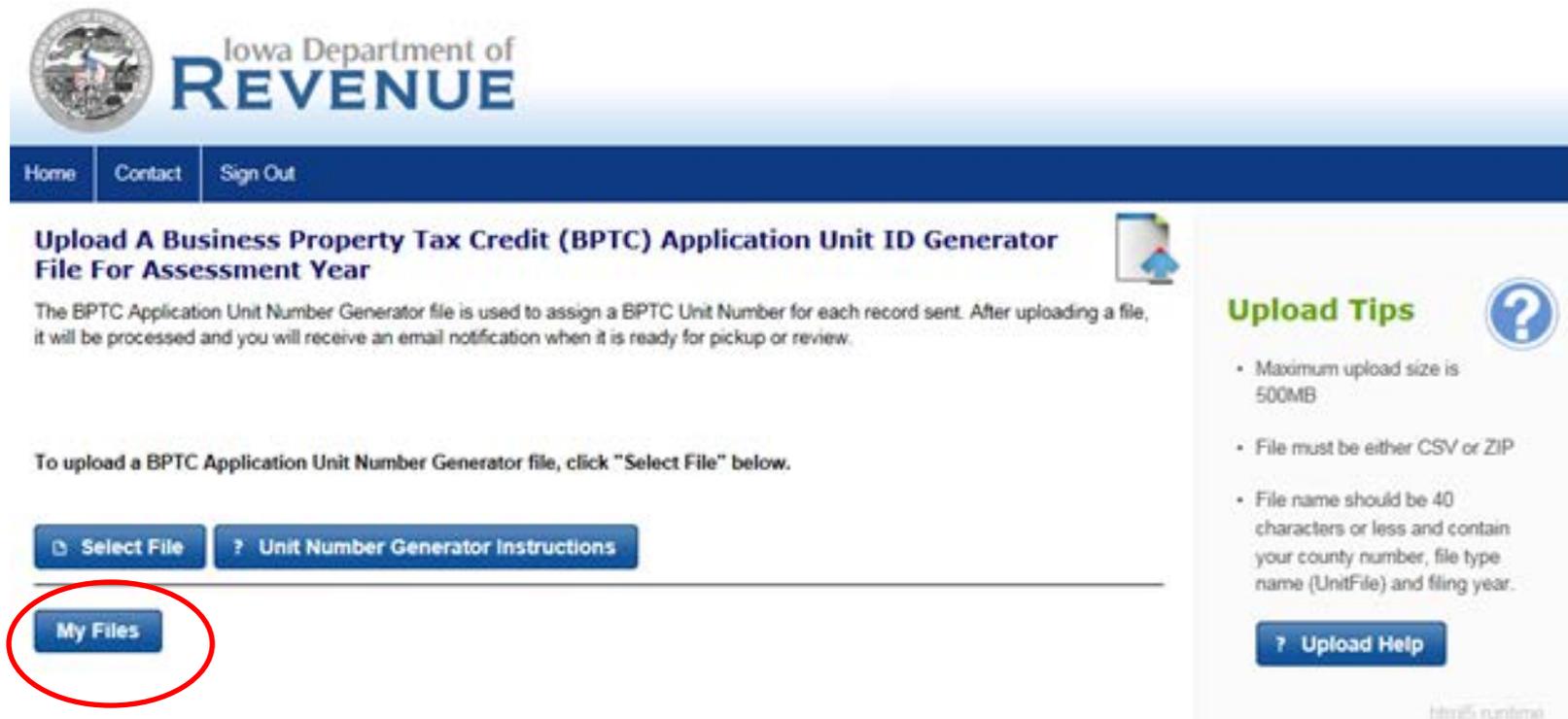
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[? Upload Help](#)

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# Timing

**Wait overnight to check file status.**



The screenshot shows the Iowa Department of Revenue website. The header includes the state seal and the text "Iowa Department of REVENUE". A navigation bar contains links for "Home", "Contact", and "Sign Out". The main content area is titled "Upload A Business Property Tax Credit (BPTC) Application Unit ID Generator File For Assessment Year". Below the title, there is a paragraph explaining the purpose of the file and a "Select File" button. A "My Files" button is circled in red. To the right, there is an "Upload Tips" section with a question mark icon and a list of instructions: "Maximum upload size is 500MB", "File must be either CSV or ZIP", and "File name should be 40 characters or less and contain your county number, file type name (UnitFile) and filing year." There is also an "Upload Help" button.

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### Upload A Business Property Tax Credit (BPTC) Application Unit ID Generator File For Assessment Year

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Select File ? Unit Number Generator Instructions

**My Files**

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? Upload Help

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# File Status



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## Your Files

Welcome s chambers. All of the files you have uploaded are displayed below with the most recent uploads showing first. You can filter this list by selecting an upload type from the drop down below and then pressing the search button.

File Type:

File	Upload Type	Uploaded By	File Size	Uploaded Date	Status
<a href="#">24_unitfile_062315.csv</a>	Unit Id Generator	duane.zenk@iowaid	5079	6/23/2015 9:28:31 AM	Complete
<a href="#">24_unitfile_051115.csv</a>	Unit Id Generator	duane.zenk@iowaid	3456	5/11/2015 12:01:00 PM	Complete
<a href="#">24_unitfile_050415.csv</a>	Unit Id Generator	duane.zenk@iowaid	3456	5/5/2015 7:52:39 AM	Deleted
<a href="#">24_unitfile_062514.csv</a>	Unit Id Generator	terri.martens@iowaid	798	6/25/2014 8:28:46 AM	Complete
<a href="#">24_unitfile_retiretrailroad.csv</a>	Unit Id Generator	terri.martens@iowaid	2114	2/28/2014 9:28:51 AM	Accepted

# File Status = Accepted

## Accepted Status is an indication of:

- 1) You have reviewed your file and determined whether to retire items that are already in the system or to ignore their submission; or
- 2) Your file only contained items that need to be retired. The system can not proceed to “Complete” because you have not asked for new Unit Ids.

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# Downloading a Unit ID File

# localgovexchange.iowa.gov



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# Select Unit ID



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### Upload File Types

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**UNIT ID**

**DATA ELEMENTS**

**REPLACEMENT CLAIM**

### Important Notices

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# Select My Files



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[? Unit Number Generator Instructions](#)

[My Files](#)

### Upload Tips



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- File name should be 40 characters or less and contain your county number, file type name (UnitFile) and filing year.

[? Upload Help](#)

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# File Status = Complete

**Ready to download your Unit ID file.  
Click “Complete” to get started.**



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UPLOAD

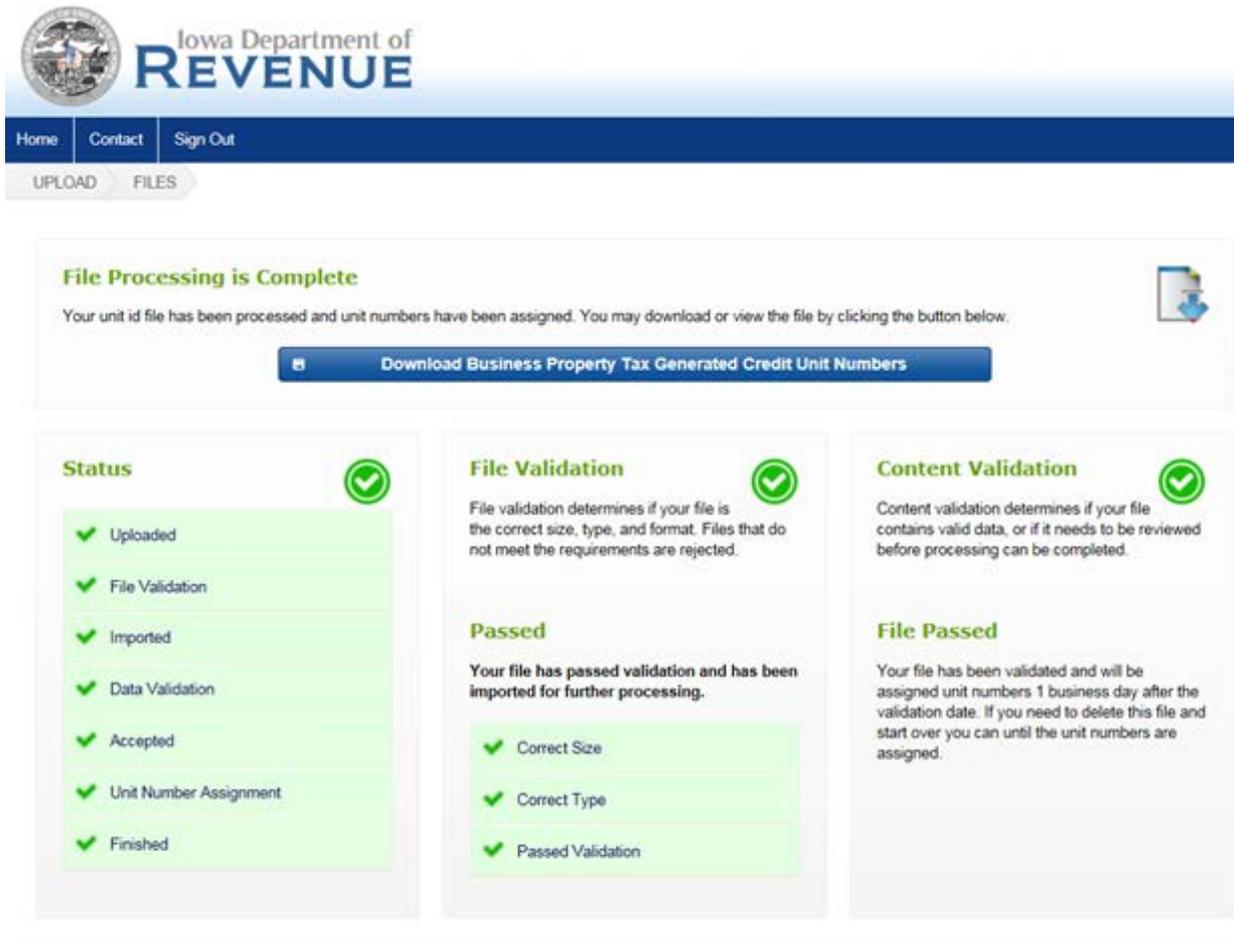
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# See this Screen



The screenshot displays the Iowa Department of Revenue website interface. At the top left is the state seal and the text 'Iowa Department of REVENUE'. A navigation bar contains 'Home', 'Contact', and 'Sign Out'. Below this is a 'UPLOAD FILES' button. The main content area features a green header 'File Processing is Complete' with a download icon. A message states: 'Your unit id file has been processed and unit numbers have been assigned. You may download or view the file by clicking the button below.' A blue button labeled 'Download Business Property Tax Generated Credit Unit Numbers' is provided. Below are three columns: 'Status' (listing steps from Uploaded to Finished), 'File Validation' (explaining validation criteria and listing 'Correct Size', 'Correct Type', and 'Passed Validation'), and 'Content Validation' (explaining content validation and listing 'File Passed').

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Home Contact Sign Out

UPLOAD FILES

**File Processing is Complete**

Your unit id file has been processed and unit numbers have been assigned. You may download or view the file by clicking the button below.

[Download Business Property Tax Generated Credit Unit Numbers](#)

**Status**

- ✓ Uploaded
- ✓ File Validation
- ✓ Imported
- ✓ Data Validation
- ✓ Accepted
- ✓ Unit Number Assignment
- ✓ Finished

**File Validation**

File validation determines if your file is the correct size, type, and format. Files that do not meet the requirements are rejected.

**Passed**

Your file has passed validation and has been imported for further processing.

- ✓ Correct Size
- ✓ Correct Type
- ✓ Passed Validation

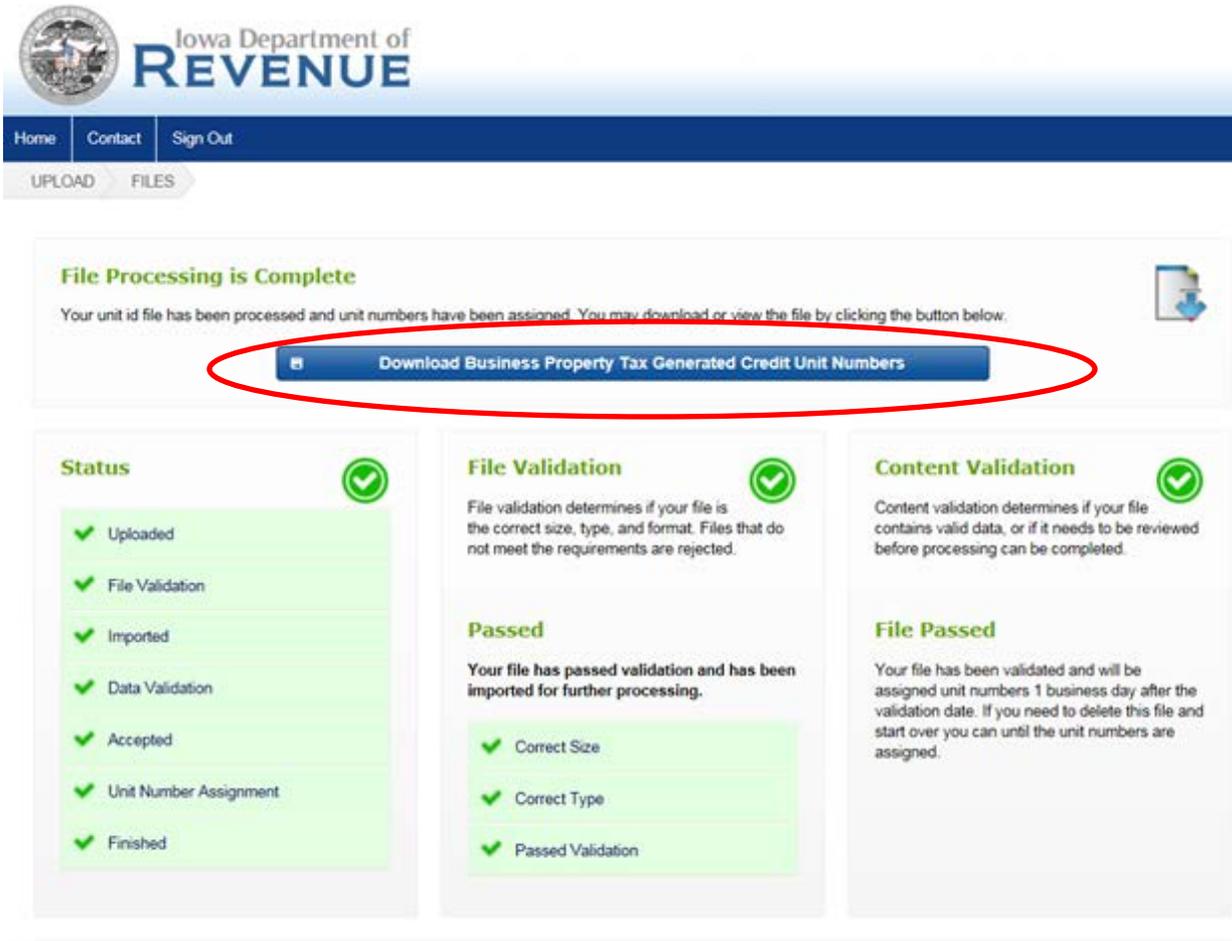
**Content Validation**

Content validation determines if your file contains valid data, or if it needs to be reviewed before processing can be completed.

**File Passed**

Your file has been validated and will be assigned unit numbers 1 business day after the validation date. If you need to delete this file and start over you can until the unit numbers are assigned.

# Click Button to Download File



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UPLOAD FILES

**File Processing is Complete** 

Your unit id file has been processed and unit numbers have been assigned. You may download or view the file by clicking the button below.

**Download Business Property Tax Generated Credit Unit Numbers**

**Status** 

- ✓ Uploaded
- ✓ File Validation
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# Select your Download type

## Click “Download”

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24\_unitfile\_062315.csv

**Download Unit Id file**

All Unit Ids

My Last Upload

Date Range

From Date :

To Date :

**Download**

Iowa.Gov | Tax.Iowa.Gov | Policies v2.0.1.4

**All Unit IDs = All current Unit IDs**

**My Last Upload = only the last file the user (you) uploaded**

**Date Range = Unit IDs generated in a specific time period**



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# Timing

# BPTC AY 2015 Processing

Applications received by Assessor  
on or before March 15, 2016

Auditor must submit and reconcile  
valuation data (the Data Elements File)  
by June 30, 2016

# BPTC AY 16 Processing

Applications received by Assessor  
by July 1, 2016

Auditor must submit and reconcile  
valuation data (the Data Elements File)  
By June 30, 2017

# To watch this webinar again: tax.iowa.gov



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[How to Pay My Taxes](#)

[Iowa Fuel Tax Rate Changes  
Effective July 1, 2015](#)

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- [Declaration of Value Form \(DOV\)](#)
- [Disabled Veteran Tax Credit](#)
- [Equalization and Rollbacks](#)
- [Exam Information](#)
- [Iowa Property Tax Overview](#)
- [Legislation](#)
- [Local Boards of Review](#)
- [Nonresident Property Owners \(Word\)](#)
- [Related Links](#)
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- [Agriculture Adjustment Rule 71.3 for Noncropland](#)
- [Business Property Tax Credit](#)
- [Cable TV Company Forms](#)
- [Exempt Entities Construction Registration](#)
- [Utility Company Forms](#)
- [Utility Replacement Tax Task Force](#)

What is a Unit? & 426C.4 Business Property Tax Credit

A Unit is:

- Within the same county
- Same classification
- Same ownership
- Separate item on tax list
- Operated by that "person" for common use and purpose
- Contiguous parcels:
  - share common boundary
  - within same building or structure, regardless of boundary
  - BLL's are contiguous as long as the land upon which they sit is contiguous regardless of the land ownership

### Self Help & Training

- [FAQs](#)
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- [Program Distribution Histories](#)
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# Also Posted With Webinar



## **User Manual** for

**Business Property Tax Credit  
Unit ID Generator File  
Submission**

**LocalGovExchange.iowa.gov**

**March 2016**



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# Questions

Send questions to: [PropertyTax@iowa.gov](mailto:PropertyTax@iowa.gov)

Need hand holding? Call Susan 515-281-3159

# THANK YOU!!



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