

Meeting Agenda/Minutes

# Senate File 295 Implementation Advisory Panel

DATE: FRIDAY JANUARY 15, 2016  
 TIME: 11:00 A.M. – 12:25 P.M.

LOCATION: ISAC CONFERENCE ROOM A, WEST DES MOINES, IA

FACILITATORS	Lucas Beenken / Julie Roisen		
<b>ATTENDEES</b>	Kay Arvidson – IDR Property Tax Division	Deb Kout – Solutions - phone	Deanne Raymond – Marshall County - phone
	Dave Bader – Thompson Reuters - phone	Ryan LaFrenz – Polk County Auditor’s Office	Julie Riesselman – Tyler Technologies
	Carla Becker – Delaware County Auditor - phone	Jeff Lewis – Schneider Corp	Julie Roisen – IDR Property Tax Division Administrator
	Lucas Beenken - ISAC	Craig Madill - Marshall County Assessor - phone	Rodney Ross – Cerro Gordo County IT
	Mark Castensen – Linn County Assessor’s Office - phone	Mary Maloney – Polk County Treasurer	Frank Rottinghaus – Floyd County Treasurer - phone
	Susan Chambers – IDR Property Tax Division	Dale McCrea - Muscatine County Assessor	Sandy Shonka – Cerro Gordo County Auditor’s Office - phone
	BJ Covington - IDR Property Tax Division	Erin Mullenix – Iowa League of Cities	Doug Smith – Thompson Reuters - phone
	Melanie Ewalt – Marshall County GIS - phone	Dana Naumann –Mason City Assessor - phone	Kim Veeder – Black Hawk County IT Director - phone
	Jeff Garrett – Washington County Treasurer	Darina Petkova – IDR Internal Services Division	Amy Vermillion – Poweshiek County Assessor’s Office
	Carrie Johnson – Local Government DOM	Ed Saunders – Cedar Rapids Assessor’s Office - phone	Jeanean Willems – Tyler Technologies
	Kelsi Jurick – Polk County Assessor’s Office		Mark Williams - OCIO

Agenda topics	Notes:
Opening Remarks / Introductions	<ul style="list-style-type: none"> <li>Meeting opened at 11:00 A.M. with introductions of attendees.</li> </ul>
Data Elements/Dual Class Handout Provided	<ul style="list-style-type: none"> <li>Fields 25, 26 &amp; 27 are specific to dual class properties</li> <li>Test needed with vendors and in-house systems by end of February.</li> <li>Vendors &amp; Cerro Gordo County will send test files to Susan Chambers; Polk County will test for Aumentum.</li> </ul>
Corrections Update Handout Provided	<ul style="list-style-type: none"> <li>Handout reviews what counties need to prepare in advance of doing corrections.</li> <li>Chambers will schedule time with each county in need of corrections to walk through the process. Chambers will reach vendors if additional assistance is needed.</li> <li>The LocalGovExchange portal will be open for corrections February 1 – 26.</li> <li>The portal will close for corrections on February 29 in order to</li> </ul>

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	<p>process warrants due to counties by March 15.</p> <ul style="list-style-type: none"> <li>• 200 corrections are required each day in February in order to have all corrections completed by February 26.</li> </ul>
Corrections Update – Unique Aggregation Indicator (AI) required	<ul style="list-style-type: none"> <li>• An aggregation indicator (AI) is required to reconfigure a unit in the corrections process. This cannot be a duplicate of any other AI in the database.</li> <li>• IDR recommends the process below to introduce a new and unique AI in the correction process: <ol style="list-style-type: none"> <li>1. Begin with the AY so these corrections for a given AY will be grouped together.</li> <li>2. Follow the AY with 3 digits (e.g. 001, 002, etc.)</li> </ol> </li> <li>• <b>The corrections AI is only used in corrections.</b></li> </ul>
BPTC Corrections Administrative Review and documentation	<ul style="list-style-type: none"> <li>• BPTC Corrections require Administrative review by IDR.</li> <li>• Counties will be sent an email once corrections are approved.</li> <li>• Detailed reports will be provided for documentation.</li> </ul>
AY 2015 Replacement Claim	<ul style="list-style-type: none"> <li>• The Replacement Claim file beginning for AY 2015 <b>cannot</b> include duplicate tax districts. The file will be rejected if there are duplicate tax districts.</li> </ul>
Agland/Family Farm Update	<ul style="list-style-type: none"> <li>• This will be ready for testing after March.</li> <li>• The acres field is required. A zero may be used if a county does not have the data.</li> </ul>
Assessor’s Permanent BPTC File	<ul style="list-style-type: none"> <li>• At today’s GIS Subcommittee meeting it was determined that this will be a GIS file delivered in October of each year.</li> <li>• The file will include geometry.</li> <li>• Once the BPTC is calculated each year in July, the LocalGovExchange portal will open to issue new Unit IDs for the next BPTC cycle. Once the BPTC deadline shifts to July 1 in 2016, assessors will have until October each year to secure Unit IDs for the units the assessor will recommend for approval for 2016. These will be included in the October GIS file.</li> <li>• The Assessor’s Permanent BPTC file will be compiled and delivered by local staff. It will be the same file format as the current Data Elements file and include some sort of layer package.</li> <li>• The Assessor’s Permanent BPTC File will be submitted to the GIS repository already in place for other GIS file exchanges.</li> </ul>
Test of Assessor’s Permanent BPTC File	<ul style="list-style-type: none"> <li>• All counties must participate in a test file process to submit an Assessor’s Permanent BPTC File by April 15 using 2015 data. Data is not expected to be complete or perfect for this test. This is a test of the process to submit the file.</li> <li>• The GIS Subcommittee will work with vendors and IDR to create instructions for submitting the file. This will be reviewed at the February GIS meeting.</li> <li>• The test and instructions will be discussed with Assessors, Auditors, and ICIT at ISAC Spring School in March.</li> </ul>

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Central Assessments	<ul style="list-style-type: none"> <li>• IDR is beginning to address how to modernize the process for sending central assessment values to local governments in a manner similar to the Replacement Tax process now in place.</li> <li>• The Working Group is asked to think about providing this data as an electronic process and what it would look like.</li> <li>• Appraisers and counties have expressed an interest in the ability to check line miles before IDR determines value.</li> <li>• Becker will send an example of the reconciliation document she provides to her Board of Supervisors regarding this topic.</li> <li>• A more robust discussion of ideas for Central Assessments will begin at the February Working Group meeting.</li> </ul>
Next Meeting Date and Location	<ul style="list-style-type: none"> <li>• Friday February 19 11:00 am following the GIS Subcommittee Meeting.</li> <li>• ISAC Offices, West Des Moines, IA Conference Room A</li> </ul>
Meeting adjourned	<ul style="list-style-type: none"> <li>• 12:25 pm</li> </ul>

#	ACTION ITEMS	RESPONSIBLE	DUE DATE
1.	Vendors, Polk County & Cerro Gordo County send Data Elements file to Susan Chambers to test Dual Class.	Vendors, Polk County & Cerro Gordo County	Before February 29
2.	One-on-one call with each county in need of corrections to walk through the process.	Chambers	In February
3.	Compete Corrections	Respective Counties	By February 26
4.	Close Corrections process.	IDR	February 29
5.	Send IDR an example of the reconciliation document provided to Board for approval of central assessments.	Becker	Prior to February meeting