

Meeting Agenda/Minutes

Senate File 295 Implementation Advisory Panel

DATE: FRIDAY FEBRUARY 19, 2016
 TIME: 11:00 A.M. – 12:35 P.M.

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

FACILITATORS	Lucas Beenken / Julie Roisen		
ATTENDEES	Kay Arvidson – IDR Property Tax Division	Carrie Johnson – Local Government DOM	Julie Roisen – IDR Property Tax Division Administrator
	Carla Becker – Delaware County Auditor - phone	Chris Jones – Thompson Reuters - phone	Rodney Ross – Cerro Gordo County IT
	Lucas Beenken - ISAC	Ryan LaFrenz – Polk County Auditor’s Office	Frank Rottinghaus – Floyd County Treasurer - phone
	Mark Berkenpas – IDR Property Tax Division	Craig Madill - Marshall County Assessor - phone	Lori Marchese – IDR Property Tax Division
	Mark Castensen – Linn County Assessor’s Office - phone	Mary Maloney – Polk County Treasurer	Doug Smith – Thompson Reuters - phone
	Susan Chambers – IDR Property Tax Division	Dale McCrea - Muscatine County Assessor	Roland Simmons – IDR Property Tax Division
	BJ Covington - IDR Property Tax Division	Erin Mullenix – Iowa League of Cities	Solutions Team - phone
	Melanie Ewalt – Marshall County GIS - phone	Darina Petkova – IDR Internal Services Division	Amy Vermillion – Poweshiek County Assessor’s Office
	Whitney Hunt – Marshall County - phone	Julie Riesselman – Tyler Technologies	Mark Williams - OCIO

Agenda topics	Notes:
Opening Remarks / Introductions	<ul style="list-style-type: none"> Meeting opened at 11:00 A.M. with introductions of attendees.
New Agenda Item: Data Elements/Dual Class Testing	<ul style="list-style-type: none"> Testing for primary and secondary class file structure before June with vendors and select counties. Primary class was assumed to be the first record, now Commercial or Industrial. Next year primary could also be multiresidential. Next meeting agenda item: New Unit IDs if mutliresidential is primary class
Corrections Update	<ul style="list-style-type: none"> Concluding week of Feb 25 for March 2016 installment. Will open portal for additional corrections after March 2016 installment paid. Corrections after March 2016 installment will be paid in March 2017 installment. Corrections need to include the BPTC application date. After October 31, 2016, applications from 2013 will be past the statutory 3 year window for corrections. Every correction generates a notice to the taxpayer and local jurisdictions according to statute. Taxpayer notices are sent by mail. Local notices are posted on LocalGovExchange.

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<p>Assessor's Permanent BPTC File Test</p>	<ul style="list-style-type: none"> • The test of the GIS submission process for all jurisdictions will begin in March and conclude April 15. • IDR will send instructions to local GIS or IT contacts • The test will utilize AY 14 or AY 15 data as available. Data is not expected to be perfect. • Submission will move to October 2016 for AY 2016.
<p>Agland Update</p>	<ul style="list-style-type: none"> • Internal development and testing will be ready for testing with vendors and select counties in April. • Auditors will submit files through the traditional process in 2016 and test submissions through LocalGovExchange to run parallel systems in May.
<p>New DOV</p>	<ul style="list-style-type: none"> • The new DOV will be introduced in April and fully implemented in June, 2016. It provides more space for assessor's to enter current DOV information, and better accommodates dual class reporting. • The form has been reviewed with Recorders and external audiences. • A control number has been added to connect images of the DOV with digital data within IDR information systems when digital data for DOVs becomes available.
<p>Central Assessments</p>	<ul style="list-style-type: none"> • Conversation will start today and continue at the next Working Group meeting. • Current process: Telecom and railroad companies have value allocated by line miles. Companies send information to auditors and to IDR. <ul style="list-style-type: none"> - Auditors reconcile information with companies to determine line miles. - IDR issues utility certificates by statute in October. IDR then works with the auditors to validate IDR data to reflect auditor data. Many certs are reissued. • Proposed process change: <ul style="list-style-type: none"> - Auditors send IDR the utility data after reconciliation with the companies. - IDR provide a file for auditors that includes the valuation information. - Certs would be issued based on data that validated by auditors. • Possible file data from auditors: <ul style="list-style-type: none"> - Assessment year - County # - Some sort of unique parcel ID if necessary - DOM tax district - Company # - IDR Company name • Gas and Electric process is somewhat similar. <ul style="list-style-type: none"> - Auditors reconcile after January 1 for gas and electric. - Preliminary valuation provided for replacement tax in October - DOM checks tax districts in January - More discussion needed.

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Next Meeting Date and Location	<ul style="list-style-type: none">• Friday April 1, 2016 11:00 am following the GIS Subcommittee Meeting.• ISAC Offices, West Des Moines, IA Conference Room A
Meeting adjourned	<ul style="list-style-type: none">• 12:35 pm

#	ACTION ITEMS	RESPONSIBLE	DUE DATE
1.	Central Assessments	Working Group discussion	Continue at next meeting