

Meeting Agenda/Minutes

Senate File 295 Implementation Advisory Panel

DATE: FRIDAY APRIL 24, 2015

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

TIME: 10:00 A.M. – 11:05 P.M.

FACILITATORS	Lucas Beenken / Julie Roisen		
ATTENDEES	Mike Albers – Polk County Auditor’s Office - phone	Kelsi Jurick – Polk County Assessor’s Office	Rodney Ross – Cerro Gordo County Programmer
	Kay Arvidson – IDR Property Tax Division	Chris Knobbe – Tyler Technologies	Frank Rottinghaus – Floyd County Treasurer - phone
	Dave Bader – Thompson Reuters - phone	Ryan Lafrenz – Polk County Auditor’s Office	Sandy Shonka – Cerro Gordo County Auditor’s Office
	Carla Becker – Delaware County Auditor	Jeff Lewis – Schneider Corp	Monica Sinclair – Solutions - phone
	Lucas Beenken – Public Policy Specialist	Mary Maloney – Polk County Treasurer	Doug Smith – Thompson Reuters - phone
	Mark Castenson – Linn County Assessor’s Office - phone	Dale McCrea - Muscatine County Assessor	Janine Sulzner – Jones County Auditor - phone
	Susan Chambers – IDR Property Tax Division	Erin Mullenix – Iowa League of Cities	Gordon Thompson – Linn County Auditor’s Office - phone
	Micah Cutler- Harding County GIS/ IT Director	Dana Neumann – Mason City Assessor - phone	Kim Veeder – Black Hawk County IT Director - phone
	Jeff Garrett – Washington County Treasurer	Mel Obbink – Sidwell	Amy Vermillion – Poweshiek County Assessor’s Office
	Carrie Johnson – Local Government DOM	Julie Roisen – IDR Property Tax Division Administrator	Jeanean Willems – Tyler

Agenda topics	Notes:
Opening Remarks / Introductions	<ul style="list-style-type: none"> Meeting opened at 10:00 am with introductions of attendees.
Corrections Update and Excess Credits	<ul style="list-style-type: none"> The team reviewed a form letter distributed to county auditors earlier this month to return overpayments of Replacement Claims and BPTC. Payments are to be returned to the attention of Susan Chambers with the form letter included. The form letter tracks the tax district, levy rate and adjusted claim amount. This is relevant when a PAAB case has changed property value. IDR is seeking the total rollback difference. If needed IDR will work with Sulzner and Becker to reword the form letter. Instructions are for the counties to use the form letter to remit the net amount. If a county is owed money, they are to work with Susan Chambers directly. IDR checks all form letter data with the project’s database to be sure it is correct. Becker has information to send to auditors to clarify this process. She will send it out after this meeting.

Meeting Agenda/Minutes

<p>Corrections Timing</p>	<ul style="list-style-type: none"> • IDR will make the first installments for the Replacement Claim and BPTC. If there are corrections or adjustments after that, they will be addressed in the second payment. • For corrections or adjustments after the second payment, IDR will make adjustments to the Replacement Claim by June 30, and will make its best efforts to make adjustments to the BPTC by June 30 as well. • Next year this process will be automated through the LocalGovExchange portal.
<p>Data Elements Reconciliation</p>	<ul style="list-style-type: none"> • IDR has prepared a document of instructions for Data Elements Reconciliation. IDR will send this to vendors if wanted. • Tyler Technologies said they want the document. Albers did too, as did Ross, and those on the phone from Linn County. It was suggested that IDR send the instructions to all counties with internal staff managing this process. • Counties also want a testing diagram. IDR will include this with the instructions document. • IDR is working on an upgrade to the process that will enable faster turn-around time for file validation. This will hopefully be deployed by June 1. Issuing Unit ID's will still be an overnight process.
<p>Tax Statements</p>	<ul style="list-style-type: none"> • Becker is getting lots of questions about excess credit on multires parcels when a property is dual classed, part commercial, part multires, and only one parcel. The BPTC is on the commercial part. • The credit is against the tax on the parcel. (Value less exemptions less rollback = taxable value. Then deduct the credit against tax from the tax due on the taxable value.) • Calculate the credit against the commercial portion, but apply it to the total tax due. • Some vendors address dual class with two statements, as two parcels tied together. This scenario does not allow for deduction of the credit against the total tax due. • Tyler Technologies asked for IDR to explain what is required on the tax statement to show for dual class parcels. • Solutions indicated they are producing two papers but one receipt for dual classed parcels. • Discussion of this issue will be continued at the next meeting. A determination on how to handle this must be doable within the constraints the vendors have today. • Code Chapter 445.5 will be reviewed regarding tax statements.
<p>Agland Update</p>	<ul style="list-style-type: none"> • Rounding during the calculation process was discussed. Treasurers are ok with the process in place for the addressing the occasional extra penny. • The file submitted for Agland and Family Farm will utilize the same process as for Replacement Claims. • <u>Reports</u> will be available by school district and tax district. If the value in the county file is different than the DOM school

Meeting Agenda/Minutes

	<p>district file, counties will be asked which value they want to use. This operates in a similar manner to fix levy rate.</p> <ul style="list-style-type: none"> • The Group decided that vendor testing for Agland will be late in the 3rd quarter. It will be scheduled over a two week time frame, with testing in week 1, issues corrected, then test again in week 2. • Will the testing be end-to-end? Input is needed on this from the Group. It will depend on the process to fix the school rate. This will be added to the next meeting agenda.
Other Issues	<ul style="list-style-type: none"> • Albers raised concern about tax districts in the file. Roisen suggested they discuss this outside of this meeting, and asked Albers to present examples of his concerns at the next meeting. • Ross described a BPTC situation where an Ag property went commercial in AY 15. There was a BPTC application but the parcel was not valid until the next AY.
GIS Subcommittee Meeting	<ul style="list-style-type: none"> • The GIS Subcommittee will convene after this meeting ends.
Next Meeting Date and Location	<ul style="list-style-type: none"> • June 5 following the GIS meeting that morning. 11:00 – 1:00 • ISAC Offices, West Des Moines. IA
Meeting adjourned at 11:05 pm	

#	ACTION ITEMS	RESPONSIBLE	DUE DATE
1.	If needed, IDR will modify form letter to transmit overpayments of Replacement Claims and BPTC.	Chambers/ Arvidson	If Becker and Sulzner advise if this is needed.
2.	Becker with send auditors instructions for remitting overpayments to IDR.	Becker	As soon as possible
3.	IDR will send vendors Data Elements Reconciliation instructions in May. This includes Tyler Technologies, Solutions, Thompson Reuters, Devnet, Albers, Lafrenz, Ross, Veeder, Castensen, and all counties with internal staff managing their property software system.	Chambers	Any others interested should let Susan Chambers know this is wanted. This will be sent out in May.
6.	Discuss tax statements for dual class properties within the constraints of tax system software.	Working Group	Agenda item for next meeting
7.	End-to-end Agland Testing	Working Group	Agenda item for next meeting
8.	Discuss Tax District concerns with IDR re: Agland File	Albers	Present concerns at next meeting.