

Meeting Agenda/Minutes

Senate File 295 Implementation Advisory Panel

DATE: WEDNESDAY SEPTEMBER 23, 2015

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

TIME: 11:10 A.M. – 12:32 P.M.

| FACILITATORS | Lucas Beenken / Julie Roisen | | |
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| ATTENDEES | Kay Arvidson – IDR Property Tax Division | Ryan Lafrenz – Polk County Auditor’s Office | Frank Rottinghaus – Floyd County Treasurer - phone |
| | Dave Bader – Thompson Reuters - phone | Stacey Law – Linn County Auditor’s Office – phone | Sandy Shonka – Cerro Gordo County Auditor’s Office |
| | Carla Becker – Delaware County Auditor | Dale McCrea - Muscatine County Assessor | Doug Smith – Thompson Reuters - phone |
| | Lucas Beenken - ISAC | Erin Mullenix – Iowa League of Cities | Solutions Team – Joel & Deb - phone |
| | Mark Castenson – Linn County Assessor’s Office - phone | Mel Obbink - Sidwell | Janine Sulzner – Jones County Auditor - phone |
| | Susan Chambers – IDR Property Tax Division | Ed Saunders – Cedar Rapids Assessor’s Office - phone | Kim Veeder – Black Hawk County IT Director - phone |
| | Jeff Garrett – Washington County Treasurer | Julie Riesselman – Tyler Technologies - phone | Amy Vermillion – Poweshiek County Assessor’s Office |
| | Carrie Johnson – Local Government DOM | Julie Roisen – IDR Property Tax Division Administrator | Mark Warren – Muscatine Area GIS |
| | Kelsi Jurick – Polk County Assessor’s Office | Rodney Ross – Cerro Gordo County IT | Jeanean Willems – Tyler Technologies |
| | | | Mark Williams - OCIO |

| Agenda topics | Notes: |
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| Opening Remarks / Introductions | <ul style="list-style-type: none"> Meeting opened at 11:10 A.M. with introductions of attendees. |
| Replacement Claim Summary | <ul style="list-style-type: none"> On the deadline date this year 33 counties had not submitted files or had to resubmit files. Files take overnight to process, and then often need review. IDR expected counties would be finished on the deadline date August 25. Counties were not finished until August 28. It was suggested that auditors receive a pictorial timeline of the process and steps to be done by the due date. |
| Notifications | <ul style="list-style-type: none"> The group was asked what local officials want to see for official notifications on the LocalGovExchange portal. These will be for BPTC, homestead, and other tax related notices. Options include a pdf, a file format, or a webpage list. A list was decided as the best option. It will need to be able available in a version to print as well. |

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| <p>Agland Update</p> | <ul style="list-style-type: none"> • Screen shots were reviewed showing the auditor’s process to login, upload an Agland file, monitor file status, proceed through needs review, receive status when the file has been reviewed by the IDR system administrator, and complete the process to submit a certified claim. • Counties will want to print out what they certify. A download report is needed for the final step in the process. |
| <p>Family Farm</p> | <ul style="list-style-type: none"> • Family Farm will follow the Agland process. • It was asked if the Family Farm file needs to have acres field added. IDR will confirm for the next meeting. • At next meeting we will finalize the Family Farm file layout. • The Agland file layout is on the IDR website on the Property Tax Reform web page. |
| <p>Assessor’s Permanent BPTC File</p> | <ul style="list-style-type: none"> • We assume this file represents approved applications. When the due date changes to July 1, units will need to stay together until the Data Elements file is submitted the following June 30. • Unit Ids for new applications for the following year, splits, or combines are not available until after the BPTC is calculated, approximately July 15. • These steps in the process were identified: <ol style="list-style-type: none"> a) New BPTC applications for the next year are due July 1 for the 2016 assessment. b) BPTC is calculated for the current tax year. c) Assessors get Unit Ids for the current assessment year after the BPTC is calculated. d) Geometry and data file for the next year’s BPTC credit are submitted to IDR by the assessor e) Assessors transfer the files to the auditors. f) Auditors manages units after receipt from the assessor and submits Data Elements file by June 30. |
| <p>GIS File Concept</p> | <ul style="list-style-type: none"> • IDR discussed the need to address the abstract process. • IDR would aggregate the information internally and produce the abstract, which the assessor would then review, address changes, and certify. • Timing for this transition would not be immediate. It is anticipated this would be take several years to fully implement. |
| <p>Questions</p> | <ul style="list-style-type: none"> • Q: Is the GIS parcel file for abstracts opening the door for other agencies to use this data? A: Yes. This provides an avenue for other state agencies to use the data. There will not be aerial photographs, and data will not be current. It will only be submitted once a year. • Q: Do Auditors need to send notices to taxpayers for increases in valuation by equalization orders? A: This does not become effective until January 1, 2016, which would impact 2017 equalization orders. Becker will send a notice to auditors on this subject. |

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| ISAC Fall School Presentation | <ul style="list-style-type: none"> IDR will speak to assessors, auditors and treasurers about the BPTC corrections process during ISAC Fall School in November. |
| Next Agenda Items | <ul style="list-style-type: none"> Family Farm file layout Agland testing procedures and implementation plan Assessor's Permanent BPTC File submission Discuss the structure and mapping for GIS abstract submissions. |
| Next Meeting Date and Location | <ul style="list-style-type: none"> October 23, 2015 11:00 am - 1:00 pm, following the GIS Subcommittee meeting that morning. ISAC Offices, West Des Moines, IA Conference Room A |
| Meeting adjourned at 12:32 pm | |

| # | ACTION ITEMS | RESPONSIBLE | DUE DATE |
|----|--|------------------------------|---------------------------------------|
| 1. | Add the ability to download a report of the certified claim at the end of the Agland file submission process | Roisen/Chambers/ Arvidson | Add to requirements ASAP |
| 2. | Does Family Farm file need to include acres? | Roisen/Chambers/ Arvidson | Confirm at next Working Group meeting |