

Meeting Agenda/Minutes

Senate File 295 Implementation Advisory Panel

DATE: WEDNESDAY OCTOBER 23, 2015
 TIME: 10:00 A.M. – 12:32 P.M.

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

FACILITATORS	Lucas Beenken / Julie Roisen		
ATTENDEES	Carla Becker – Delaware County Auditor	Craig Madill - Marshall County Assessor - phone	Frank Rottinghaus – Floyd County Treasurer - phone
	Lucas Beenken - ISAC	Dale McCrea - Muscatine County Assessor	Sandy Shonka – Cerro Gordo County Auditor’s Office - phone
	Susan Chambers – IDR Property Tax Division	Erin Mullenix – Iowa League of Cities	Doug Smith – Thompson Reuters - phone
	Melanie Ebolt – Marshall County GIS - phone	Darina Petkova – IDR Internal Services Division	Solutions Team – Jeremy & Joel
	Jeff Garrett – Washington County Treasurer - phone	Ed Saunders – Cedar Rapids Assessor’s Office - phone	Kim Veeder – Black Hawk County IT Director - phone
	Carrie Johnson – Local Government DOM	Julie Riesselman – Tyler Technologies	Jeanean Willems – Tyler Technologies
	Kelsi Jurick – Polk County Assessor’s Office	Julie Roisen – IDR Property Tax Division Administrator	Mark Williams - OCIO
	Stacey Law – Linn County Auditor’s Office – phone	Rodney Ross – Cerro Gordo County IT	

Agenda topics	Notes:
Opening Remarks / Introductions	<ul style="list-style-type: none"> Meeting opened at 10:00 A.M. with introductions of attendees.
Family Farm File Layout	<ul style="list-style-type: none"> Family Farm layout was handed out. Was not the current layout. The group will ignore this.F
Agland Update	<ul style="list-style-type: none"> <u>Plan completed by November 6:</u> <ol style="list-style-type: none"> Merge Agland code into LocalGovExchange website in test environment. Complete BPTC corrections testing. Start Agland internal testing with files submitted by counties or vendors.
Assessor’s Permanent BPTC File	<p>Applicable to 2016 assessment year:</p> <ul style="list-style-type: none"> <u>Fields 15 through 22</u> are required and can be null. <u>Fields 24 through 27</u> are required and can be null. This file is similar to the Data Elements file. Standard naming convention for file recommended: <ol style="list-style-type: none"> “county number (2 digit number)_ASSESSORBPTC_date created” New period for generating new BPTC Unit IDs: August 1 – September 30. There is no uniformity across counties in regards to the process steps taken to make corrections. <ol style="list-style-type: none"> <u>Suggestion:</u> publish guidelines, e.g. Best Practices Handbook

Meeting Agenda/Minutes

	<p>that outlines at a high level:</p> <ul style="list-style-type: none"> i) necessary process steps ii) responsible party – assessor or auditor iii) deadline for completing each step iv) content to be created in collaboration with the state associations of auditors and assessors v) handbook to be publicized by Iowa State Association of Assessors and a link to be available on LocalGovExchange. <ul style="list-style-type: none"> • <u>Filed 28</u> – GIS ID number <ul style="list-style-type: none"> a) There isn't a unique identifier that exists in the tax system, as well as the GIS system. <ul style="list-style-type: none"> i) The unique identifier is not the same number across all counties. b) GIS Discussion: the following process steps were identified: <ul style="list-style-type: none"> i) Assessor submits parcel file to LocalGovExchange ii) BPTC Unit IDs are generated iii) BPTC Unit IDs are uploaded back to the county iv) BPTC Unit IDs are uploaded into the county GIS system v) GIS file including BPTC Unit ID is submitted to IDR through LocalGovExchange. c) Conclusion: no development will be required in the tax administration software for the counties. County GIS personnel will pull from the tax system everything they would normally pull plus the BPTC Unit IDs. Therefore, only the GIS file needs to be sent to IDR with all tax admin as part of a GIS layer file. • <u>IDR Consideration</u>: Does IDR want all applications for BPTC to be submitted for Unit IDs or just the approved ones? How would IDR handle BPTC applications that were denied? What if the Board of Supervisors approves them at a later date?
<p>Digital Abstract Discussion</p>	<ul style="list-style-type: none"> • Could IDR receive a parcel level file, similar to the Data Elements file, which will replace the multi-page (27 pages) Excel file? <ul style="list-style-type: none"> ○ In this case IDR will aggregate internally. • From vendors' standpoint what would this look like and what problems might be encountered? • Identified limitations: <ul style="list-style-type: none"> ○ Ending balance is not always the beginning balance. ○ Parcel information is not a required/validated against field in some software, as the only information needed is aggregate by classification by taxing district. No balancing occurs on parcel level. • What other limitations exist? • Any ideas and comments are appreciated.

Meeting Agenda/Minutes

Other Items for Consideration and/or Future Meeting Discussion	<ul style="list-style-type: none"> • Replacement Claim: IDR created a vehicle for counties to choose a levy rate other than the one distributed by DOM. <ul style="list-style-type: none"> ○ Some counties need to settle up for 2013 before IDR runs corrections for 2014. <ul style="list-style-type: none"> ▪ Susan Chambers will communicate to those counties on the steps to be taken to settle up. Vendors will be included in the communication.
Next Meeting Date and Location	<ul style="list-style-type: none"> • Wednesday December 2, 2015 11:00 am following the GIS Subcommittee Meeting. • ISAC Offices, West Des Moines, IA Conference Room A
Meeting adjourned	

#	ACTION ITEMS	RESPONSIBLE	DUE DATE
1.	Determine if “Exempt Acres” is being used in the calculation or should they be ignored?	Raisen/Chambers/Arvidson	Confirm at next Working Group meeting
2.	Review Family Farm File Layout	Chambers	Report to Working Group before next meeting
3.	Review Replacement Claim corrections for 2013 with counties where needed	Chambers	Before November payments are processed.
4.	Discuss how treasurers will refund taxpayers re: Replacement Claim.	ISAC Working Group	Next Meeting Agenda Item
5.	Develop Handbook for Assessor’s Permanent BPTC File in coordination with ISAA and ISACA. Provide link for LocalGovExchange portal.	IDR, ISAA, ISACA	To be determined
6.	Should all applications receive a Unit ID, or only those recommended by the assessor?	Raisen/Chambers/Arvidson	Determine by next Working Group meeting