

# Senate File 295 Implementation Advisory Panel and GIS Subcommittee Meeting

DATE: FRIDAY SEPTEMBER 8, 2016

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

TIME: 10:00 – 11:25 AM

<b>FACILITATORS</b>	Lucas Beenken / Julie Roisen		
<b>ATTENDEES</b>	Kay Arvidson – IDR Property Tax Division	Chris Jones – Thompson Reuters - phone	Rodney Ross – Cerro Gordo County IT
	Dave Bader – Thompson Reuters - phone	Kelsi Jurik – Polk County Assessor’s Office	Frank Rottinghaus – Floyd County Treasurer - phone
	Carla Becker – Delaware County Auditor	Jeff Lewis – Schneider Corp.	Sandy Shonka – Cerro Gordo County Auditor - phone
	Lucas Beenken - ISAC	Craig Madill - Marshall County Assessor - phone	Doug Smith – Thompson Reuters - phone
	Mark Castensen – Linn County Assessor’s Office - phone	Mary Maloney – Polk County Treasurer	Solutions Team – Joel and Deb - phone
	Susan Chambers – IDR Property Tax Division	Dale McCrea - Muscatine County Assessor	Amy Vermillion – Poweshiek County Assessor’s Office
	BJ Covington - IDR Property Tax Division	Dana Naumann – Mason City Assessor - phone	Rajesh Srinivasan - OCIO
	Micah Cutler- Harding County GIS/ IT Director	Mel Obbink - Sidwell	Patrick Wilke-Brown – Iowa OCIO/State GeoTec
	Melanie Ewalt – Marshall County GIS - phone	Mickey Shields – Iowa League of Cities	Mark Warren – Muscatine Area GIS
	Jeff Garrett – Washington County Treasurer	Julie Riesselman – Tyler Technologies - phone	Jeanean Willems – Tyler Technologies
Carrie Johnson – Local Government DOM	Julie Roisen – IDR Property Tax Division Administrator	Mark Williams - OCIO	

Agenda topics	Notes:
Opening Remarks / Introductions	<ul style="list-style-type: none"> <li>Meeting opened at 10:00 A.M. with introductions of attendees.</li> </ul>
BPTC Issues	<ul style="list-style-type: none"> <li>BPTC Corrections can be made up to October 31 three years following the <u>initial</u> application.</li> <li>The initial application date is required in order to process a correction through the LocalGovExchange portal.</li> <li>Question: How will counties address a judicial or PAAB order changing unit value after the three year window when funds are to be returned to the BPTC pool? A legal opinion will follow.</li> </ul>
Replacement Claim Issues	<ul style="list-style-type: none"> <li>Proration will be handled similar to agland/family farm today.</li> <li>Question: how will proration be reported to the counties when this begins? Answer: A column will be added to the output report to identify the prorated amount.</li> </ul>

## Meeting Agenda/Minutes

	<ul style="list-style-type: none"> <li>• It was recommended that a review of Replacement Claim be included at the ISAC New Officers training. There will be 17 new Auditors coming into office in January 2017.</li> </ul>
Moneys and Credits	<ul style="list-style-type: none"> <li>• This process is handled by the Iowa Division of Credit Unions (IDCU).</li> <li>• The IDCU has revised the form used by credit unions to report reserves to the local assessor.</li> <li>• Beginning in 2017, IDCU will provide pre-populated forms will be provided to credit unions. This impacts approximately 1/3 of the counties.</li> <li>• When this happens, moneys and credits will no longer be included in the abstract.</li> <li>• IDR will ask assessors to send copies of the confidential report by mail to the Department. These forms should not be emailed since they include confidential taxpayer information.</li> </ul>
Assessor's Permanent BPTC GIS File Submission	<ul style="list-style-type: none"> <li>• This submission is due from all counties by October 15.</li> <li>• Instructions and instructional videos will be posted on the IDR website and shared with assessors and GIS staff in all jurisdictions.</li> <li>• The file must include the Unit IDs for the 2016 Assessment Year for the BPTC applications recommended for approval by the Assessor.</li> </ul>
Web Service Demonstration	<ul style="list-style-type: none"> <li>• The OCIO team presented a demo of a web service based on the Assessor's Permanent BPTC GIS File submission.</li> <li>• This web service will be available through the LocalGovExchange portal to identify BPTC property units recommended for approval by the assessor.</li> <li>• Addition of the web service will accompany a new look for the LocalGovExchange web portal. The portal is expanding to accommodate other file exchanges with local governments in addition to the BPTC and Replacement Claim. Users will have access to the specific portal services based on their A &amp; A username and password.</li> </ul>
Other Items for Consideration	<ul style="list-style-type: none"> <li>• Agland and Family Farm submissions will wait until 2017.</li> <li>• School district consolidation data for these claims impacts 10 – 15 counties at most. IDR will step through how to handle these claims with the counties that are impacted.</li> <li>• Central Assessment work is on hold in order to complete database development work necessary for Multiresidential Equalization in 2017.</li> <li>• It was confirmed that the county warrant for the Homestead Tax Credit also includes the Disabled Veterans Homestead Tax Credit.</li> <li>• Question – is the GIS Subcommittee an ad hoc group or a permanent group? Answer: GIS work is anticipated to expand in 2017.</li> </ul>

### Meeting Agenda/Minutes

Next Meeting Date and Location	<ul style="list-style-type: none"> <li>The next meeting was discussed for early December, following the ISAC Fall School, but a date was not set.</li> </ul>
Meeting adjourned	<ul style="list-style-type: none"> <li>11:25 A.M.</li> </ul>

#	ACTION ITEMS	RESPONSIBLE	DUE DATE
1.	Seek legal opinion regarding how counties are to address a change of value from a judicial or PAAB order after the three year window for BPTC corrections.	IDR	Provide response at next meeting.
2.	Auditor training on TIF Districts	Becker	At upcoming ISAC Fall School or at ISAC New Officers School
3.	Provide the Assessor's Permanent BPTC submission instructions and instructional videos to GIS and Assessors.	IDR	In advance of October 15 due date.