

Meeting Agenda/Minutes

# Senate File 295 Implementation Advisory Panel

DATE: TUESDAY MAY 20, 2014  
 TIME: 1:00 P.M. – 3:20 P.M.

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

<b>FACILITATORS</b>	Lucas Beenken / Julie Roisen		
<b>ATTENDEES</b>	Kay Arvidson – IDR	Dianne Kiefer – Wapello County Treasurer - phone	Rodney Ross – Cerro Gordo County Programmer
	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 - phone	Nicole Maakestad – Marshall County Programmer	Solutions - Monica Peterson, Joel Rose, Deb – - Phone
	Lucas Beenken – ISAC	Mary Maloney – Polk County Treasurer	Janine Sulzner – Jones County Auditor
	Doug Benson - phone	Erin Mullenix – Iowa League of Cities - Phone	Gordon Thompson – Linn County Auditor’s Office
	Marsha Carter – Shelby County Auditor - phone	Julie Roisen – IDR Property Tax Division Administrator	Jeanean Willems – Tyler
	Susan Chambers – IDR Property Tax	Julie Riesselman - Tyler	Kim Veeder – Blackhawk County
	Jeff Garrett – Washington County Treasurer - phone		

<b>Agenda topics</b>	<b>Notes:</b>
Opening Remarks / Introductions	<ul style="list-style-type: none"> <li>Meeting opened at 1:00 P.M. with introductions of attendees.</li> </ul>
Testing Cycle Report Out	<ul style="list-style-type: none"> <li>The April 28 Data Elements testing cycle was successfully completed.</li> <li>All 99 counties tested. Three counties had “needs review” files. One county had a file deleted, which IDR restored for testing purposes.</li> <li>A fake credit was calculated. The credit amount is overstated because the counties that needed review were not included in the calculation.</li> </ul>
Moving Data Elements Into Production	<ul style="list-style-type: none"> <li>A revised schedule was reviewed for moving Data Elements into production. This will occur by June 6.</li> <li>The production database to be down for this conversion.</li> <li>IDR will let the counties know when this happens.</li> <li>After Data Elements moves into production, no other production changes will occur until after the credit calculation in July.</li> <li>Question: Once Data Elements is in production, is it time to make these corrections? Answer: Yes. Once DE is in production - check and see if anything needs to be fixed, delete the file, upload the fixed file. Counties have until July 3 to get things perfect.</li> <li>Once Data Elements is in production, if counties don’t know what to do, call IDR. If it’s not perfect before the calculation, we have a corrections process. Everyone will succeed.</li> </ul>
Replacement Claim Testing	<ul style="list-style-type: none"> <li>Once Data Elements is in production, the staging website will be set up for Replacement Claim testing. This is expected the week of June 9 – 13.</li> <li>After the credit calculation in July, Replacement Claim will move into production, and the corrections process will be prepared for testing.</li> </ul>

## Meeting Agenda/Minutes

<p>Units Not Included In Credit Calculation Report</p>	<ul style="list-style-type: none"> <li>• Two Reminders: 1) Anything that is not a perfect match will not have a credit calculated. 2) <b>It is not a perfect parcel match. It is a perfect unit match.</b></li> <li>• Before the credit is calculate – A report is available to identify units that can be corrected. After credit is calculated – this report is available to begin correction process. Once the credit has been calculated the other Data Elements file information is gone.</li> <li>• The Report was reviewed. The most common issue is a missing record. This is frequently when a unit has been retired but not removed from the BPTC Unit Generator Database.</li> <li>•</li> </ul>
<p>Units Not Included In Credit Calculation Report Missing Records Report.</p>	<ul style="list-style-type: none"> <li>• The most common issue is a missing record. This is frequently when a unit has been retired but not removed from the BPTC Unit Generator Database.</li> <li>• A long as the Data Elements file = the Unit Generator Database unit number, all is well.</li> <li>• Recommendation: Once Data Elements is in production all counties should submit a Data Elements file, let the validation run, and review the results. IDR will reach vendors for counties having issues. Vendors can provide instructions for their clients.</li> <li>• See page 4 of the meeting handout for details.</li> </ul>
<p>Units Not Included In Credit Calculation Report Parcel ID Not in Database</p>	<ul style="list-style-type: none"> <li>• The BPTC Unit # is in the database, but in the Unit Generator Database shows it doesn't belong with the unique parcel ID.</li> <li>• The most likely case for this situation is an annexation caused the unique parcel id to change, but the BPTC ID did not change.</li> <li>• The report will identify both records and what does match the unit ID (e.g. No Data Elements for the first record, Yes Data Elements for second record.)</li> <li>• The Unit Generator Database is county's responsibility to maintain.</li> <li>• See page 4 of the meeting handout for details.</li> </ul>
<p>Units Not Included In Credit Calculation Report Parcel ID Not Matching with Unit ID</p>	<ul style="list-style-type: none"> <li>• Either the Parcel or the Unit ID's does not match.</li> <li>• Everything related to the unit is removed from the calculation unless this is corrected before the deadline.</li> <li>• See page 4 of the meeting handout for details.</li> </ul>
<p>Correction Process</p>	<ul style="list-style-type: none"> <li>• This will be detailed after July 15.</li> <li>• IDR envisions a query on the website.</li> <li>• Counties will enter a parcel or unique parcel ID and see details on everything related to the unit.</li> <li>• Changes can be entered on the website.</li> <li>• It is to the county's advantage to do as many corrections as possible before calculation. This is IDR's recommendation. It impacts the distribution of the credit to the whole state. Correction before calculation is the best practice.</li> <li>• Post calculation changes will be manual.</li> <li>• After July 15 we will do testing of corrections process. Corrections will impact the second warrant payment. For the first year - if you have corrections that reduce the credit (paid too much in first payment) the second payment will be offset.</li> </ul>

## Meeting Agenda/Minutes

How is the claim calculated?	<ul style="list-style-type: none"> <li>• The credit is calculated based on the total valuations for each unit compared to the maximum value allowed for the credit times the difference in rollbacks between commercial and residential times the levy rate for the unit or the average consolidated levy rate for the unit divided by 1000 = credit amount.</li> <li>• IDR will create a uniform handout (one with single parcel, one with multiple parcel), and provide to the treasurers, assessors and auditors to share with the public so everyone is providing the same info to the public on how the credit is calculated.</li> <li>• The examples will include the average consolidated levy rate.</li> </ul>
Other Items for Consideration	<ul style="list-style-type: none"> <li>• Question: Is there interest in using the website for submission of claims such as Agland, family farm, homestead, and others? Answer: Yes.</li> <li>• A&amp;A accounts will establish permissions, so people will only see what they need to see to use the website for these purposes.</li> <li>• This will be a process improvement and automate manual processes on both the local and the IDR side.</li> <li>• This will be discussed in more detail at future meetings.</li> <li>• Another suggestion was to use this process for central assessments – railroads, pipelines, water and telephones. This will be a future discussion as well.</li> </ul>
Next Meeting Date and Location	<ul style="list-style-type: none"> <li>• June 19, 2014 10:00 am – 2:00pm at ISAC Offices in West Des Moines, IA</li> </ul>
Meeting adjourned at 3:20 pm	

#	ACTION ITEMS	RESPONSIBLE	DUE DATE
1	Let counties know when Data Elements is in production.	Roisen/Chambers	Expected the week of June 6.
2	Let vendors know the staging area is ready for Replacement Claim testing.	Roisen/Chambers	Expected by the week of June 9.
3	Create a uniform handout explaining the calculation of the credit for taxpayers.	Roisen/Chambers	Prior to July 15
4	Provide any information to Lucas in advance of the next meeting no later than June 16.	Roisen/Chambers	By June 16