

Meeting Agenda/Minutes

Senate File 295 Implementation Advisory Panel

DATE: THURSDAY, AUGUST 8, 2013
 TIME: 9:00 A.M. – 3:00 P.M.

LOCATION: ISAC BUILDING, CONF. ROOM A

FACILITATOR	Lucas Beenken / Julie Roisen					
ATTENDEES	X	Mike Albers – Polk County In-House	X	Ken Kline – Cerro Gordo County Auditor / In-House	X	Monica Peterson – Solutions
	X	Al Ales - Thomson Reuters	X	Cris Knobbe – Tyler	X	Julie Roisen – Property Tax Division Administrator
	X	Carla Becker – Delaware County Auditor	X	Deb Kout - Solutions	X	Jerry Ross – Tyler
	X	Lucas Beenken – Public Policy Specialist	X	Jennifer Kuntz – DAS ITE Project Manager	X	Rodney Ross – Cerro Gordo County Programmer / In-House
	X	Marsha Carter – Shelby County Auditor	X	Ryan Lafrenz – Polk County In-House	X	Janine Sulzner – Jones County Auditor
	X	Susan Chambers – Property Tax	X	Nicole Maakestad – Marshall County Programmer / In-House	X	Kim Veeder – Black Hawk County IT Director
	X	Jeff Garrett – Washington County Treasurer	X	Mary Maloney – Polk County Treasurer	X	Beth Weeks – Cedar Rapids Chief Deputy Assessor
	X	Carrie Johnson – Local Government DOM	X	Brad Miller – Vanguard	X	Jeanean Willems – Tyler
		Dianne Kiefer – Wapello County Treasurer	X	Dale McCrea – Muscatine County Assessor		
	X	Nick Klein – Vanguard	X	Deb McWhirter – Butler County Assessor		

Agenda topics	Notes:
1. Opening Remarks / Introductions	<ul style="list-style-type: none"> Lucas welcomed everyone to the meeting and briefly explained our purpose for gathering. Individual introductions were given with respective roles.
2. Group Communication	<ul style="list-style-type: none"> IDR is creating a ListServ for communications with the County contacts and Vendors. It will originally be comprised of all County Auditors, Assessors and Treasurers; as well as vendor contacts. Need for vendors to provide: <ul style="list-style-type: none"> Contact Name Contact Information Counties Served County Contact Type of System (i.e. Mainframe) Version of the System Additional communication will be accessed through the IDR website: http://iowa.gov/tax/locgov/13PTReform.html
3. Facilitator Background and Agenda Review	<ul style="list-style-type: none"> Jewels provided recap of her background as well as her current role with Iowa Department of Revenue Property Tax. Reviewed the proposed agenda items and gave an explanation of the goals for each topic.
4. Project / SF 295 Legislation Overview	<p>Jewels provided an overview of the four Divisions of the SF 295 legislation: http://coolice.legis.iowa.gov/linc/85/external/govbills/SF295.pdf</p> <ul style="list-style-type: none"> Division I: Establishing a business property tax credit for commercial, industrial and railway property. Division II: Establishing and modifying property assessment limitations and providing for commercial and industrial property tax replacement payments.

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	<ul style="list-style-type: none"> • Division III: Providing for the classification of multi-residential property. • Division IV: Modifying provisions for the taxation of the telecommunications company property. • Reviewed the 2013 Property Tax Reform presentation: 2013 Auditors Summer School Presentation Senate File 295
5. Timeline Review	<ul style="list-style-type: none"> • September 1, 2013 – Receive sample files from counties. • October 1, 2013 – Application released to public. • November 1, 2013 – Data templates sent to counties. • January 15, 2014 – Applications due. • February 1, 2014 – Test entire data set in UAT. • Spring 2014, 2014 – Possible retest of all data. • June 11, 2014 – Application go-live. • June 30, 2014 – Data due to State for processing. • July 15, 2014 – Data returned to local government.
6. Discussion	<ul style="list-style-type: none"> • Unit number schema – suggested it makes sense to use the Assessment Year. • Parcel ID Facts <ul style="list-style-type: none"> • DOM code concatenated is a possibility for unique ID. • All parcels from each county must have unique ID of some sort in order to prepare tax statements.
7. Data Elements (not limited to)	<ul style="list-style-type: none"> • Parcel ID (string) / Tax Statement ID • Unit / Application Number • DOM Code / Tax District Number • Geometry / GIS ID (ID that ties back to record) • Parcel ID (sometimes duplicative of the unique tax statement ID) • Valuations <ul style="list-style-type: none"> • Land • Improvements (Bldg) • Exemptions • Total • Taxpayer Info (owner) – Primary mailing address (3 sets) • Classification • Valuation (assessment Year) •
8. Parking Lot	<ul style="list-style-type: none"> • Round to nearest even dollar (tax credit) Decision: They will NOT be rounded to the nearest even dollar. • The Vanguard Record number is not the same as the parcel ID. • Need for a multi-classification flag on application and system. • Parcel ID needs to allow upload from IDR for credit. • Taxpayer / Owner mailing • Parcel ID • Unique ID needs to be fixed number of characters. Will be determined after receiving sample files. Likely is a need to use leading zeros to accommodate schema. • Discussion around potential issues when we allow for new multi-residential classifications on the same parcel. • DOM Code – Define true/false vs. Base. • Exempt Value – Discussion around Military Exemption and how that is figured into the credit. • Jurisdiction comes with a file. • Appraised Value • Exemption (Assessor) • Value upon which rollback applies (DOM 100% of value)
9. Closing	<ul style="list-style-type: none"> • Discussion around next meeting and the appropriate audience. • Jewels and Lucas gave their appreciation for all attendees and their active, valuable participation. A lot of good ideas and discussion took place and provides foundation for the implementation going forward.

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#	ACTION ITEMS	RESPONSIBLE	DUE DATE	DATE CLOSED	COMMENTS
1	Template for counties and/or vendors to send contact information will be sent out.	Lucas Beenken	08/09		
2	Contact information sent back to ISAC.	Counties/Vendors	08/16		
3	Templates will be posted on website for preliminary needed files.	Julie Roisen	08/16		
4	Definitions of each data element needed will be posted on website.	Susan Chambers	08/16		
5	Instructions on how to submit files via FTP will be posted on the website. (Note: instructions will be posted, however submission process will not be functional until 09/02.)	Julie Roisen	08/16		
6	ListServ for contacts will be created at the State level and instructions will be posted on the website.	Julie Roisen	08/23		
7	Meeting will be set up for group to reconvene week of September 9. (Note: September 10 does not work for some counties)	Lucas Beenken / Julie Roisen	09/05		