

Senate File 295 Implementation Advisory Panel

DATE: THURSDAY, SEPTEMBER 5, 2013
 TIME: 10:00 A.M. – 12:30 P.M.

LOCATION: ISAC BUILDING, CONF. ROOM A

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

Agenda topics	Notes:
1. Opening Remarks / Introductions	<ul style="list-style-type: none"> Meeting opened up with introductions of attendees. Julie reviewed the agenda and our purpose for the meeting. Our main goal for the meeting is to finalize the Business Property Tax Credit Unit ID Generator template. Also, as a group agree on deadlines and the first year process.
2. Contacts/Communications	<ul style="list-style-type: none"> Critical that we have a single-point of contact to communicate and submit each data file. IDR will be contacting your office for back-up contact in addition. Email distribution list was created and “welcome” messages were sent out on 09/04. If you did not receive a message and need to receive message regarding this project, sign up using the following link: http://elists.idrf.state.ia.us/scripts/wa.exe?SUBED1=PROPERTYTAX&A=1 Julie will be giving a number of presentations this fall. Susan distributed a handout with locations, dates and times. Julie is available to speak at other group meetings, etc., if needed. Please reach out to Julie soon for times if you would like to schedule.
3. Finalize Unit ID Generator File Template	<ul style="list-style-type: none"> Reviewed the “draft” Business Property Tax Credit Unit ID Generator template. The BPTC Unit ID Generator file should be using 2013 assessment data. It is primarily the Assessor’s responsibility for creating this file. The columns must remain in the same order and it will be a CSV file. Group decided to change the County Code field to be two digits. The logon will identify the county and internally we will append the city information.

Meeting Agenda/Minutes

	<ul style="list-style-type: none"> Originally, the rule was to have the unique parcel identifier set as 24 characters with leading zeros if necessary. A later decision was made to submit the unique identifier with however many characters that are in your system (max of 24). The Aggregation Indicator will signify the Unit Groupings. These do not have to be in numerical order. This will be a numeric field with a max length of six digits. No need for leading zeros. Classification field will be Alpha – Uppercase COMMERCIAL, INDUSTRIAL and RAILROAD. Owner name refers to the primary owner – the deed holder or contract purchaser. Max number of characters will be 255 or it will be truncated. Format will be Last Name First Name with no commas. In an effort to create efficiencies for counties, Julie will confer with legal staff to determine if centrally assessed applications could be routed through department to counties. Template is now in final status and will be posted in IDR website.
4. Process	<ul style="list-style-type: none"> Public Utilities do not qualify for the credit. The only centrally assessed properties that qualify for the credit and the rollback are the railroads because of the 4R Act. Deadline for submission of data file from assessor to IDR is Friday, January 24. February 3 is the point in time where the file with the BPTC Unit ID numbers will be posted and available for pickup. Each county needs to decide whether the Assessor or the Auditor will pick up the file to import into Auditors system. If there are Splits between 01/15 and 06/30, the original Unit ID will be retained but new parcel counts and sequence numbers will have to be modified by the County Auditor to track this as a single unit in this timeframe and then retire the unit number for the next assessment year. September 27th expected rule filing possibly using the emergency rules procedures as long as local government input has occurred prior to filing. Timeline Submission will need Auditor and Treasurer review.
5. Review Data Elements File Template	<ul style="list-style-type: none"> This discussion is tabled due to time constraints.
6. Upload / Download Application	<ul style="list-style-type: none"> Julie will provide a demo at October 2 fall school. IDR will work with several counties to do UAT Testing November 1 – Go-Live by November 15.
7. Technical Working Sub-Committee Discussion	<ul style="list-style-type: none"> Discussion on whether it would be beneficial to have a smaller workgroup to discuss more technical aspects of the process. Decision was made to continue to include everyone and give a more specific description of topics in the agenda. .
8. Parking Lot	<ul style="list-style-type: none"> How are assessors handling “pushing” of applications? Some are mailing notices to each owner. Some are speaking to organizations. Working diligently to get application finalized. Draft of the front-side of the application will be distributed. Come back to Railroad discussion. Family Farms – Next Steps discussion.
9. Closing	<ul style="list-style-type: none"> Presentation schedule. Will be out on website. Contact Jewels if you want her to present somewhere else. Next meeting will be scheduled for September 17th with the goal of finalizing Data Elements Template. Go to website and subscribe to listserv if you didn’t get a message. http://elists.idrf.state.ia.us/scripts/wa.exe?SUBED1=PROPERTYTAX&A=1

#	ACTION ITEMS	RESPONSIBLE	DUE DATE	DATE CLOSED	COMMENTS
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Meeting Agenda/Minutes

1	Create a document explaining strategic rules for eligibility of the credit.	Julie Roisen			
2	Contact legal staff to determine if railroad applications can be managed through the department.	Julie Roisen	09/10		
3	Post the Business Property Tax Credit Unit ID Generator template to website.	Julie Roisen	09/11		
4	Determine if there will be a statewide Press Release explaining the credit and eligibility.	Julie Roisen			
5	Further determine the definition of a person. Example: Someone is using a middle initial for one parcel, but not for another.	Julie Roisen / Legal Review			
6	Note regarding Date of recording, document date or ownership date review with legal staff.	Julie Roisen / Legal Review			
7	Schedule next meeting for ISAC Workgroup – tentatively September 17.	Lucas Beenken			
8	Post presentation schedule on website.	Julie Roisen			