

Meeting Agenda/Minutes

Senate File 295 Implementation Advisory Panel

DATE: WEDNESDAY, NOVEMBER 20, 2013
 TIME: 11:00 A.M. – 1:00 P.M.

LOCATION: POLK COUNTY BOARD ROOM

FACILITATOR	Lucas Beenken / Julie Roisen		
ATTENDEES	Mike Albers – Polk County Auditor's Office	Ryan Lafrenz – Polk County Auditor's Office	Ed Saunders – Cedar Rapids Assessor's office
	Kay Arvidson – IDR Communications	Nicole Maakestad – Marshall County Programmer	Sandy Shonka – Cerro Gordo County Auditor's Office (phone)
	Carla Becker – Delaware County Auditor	Mary Maloney – Polk County Treasurer	Solutions – Monica, Joel, Deb & Molly (phone)
	Lucas Beenken – Public Policy Specialist	Dale McCrea – Muscatine County Assessor	Janine Sulzner – Jones County Auditor
	Mark Castenson – Linn County Assessor's Office	Erin Mullenix – Iowa League of Cities	Gordon Thompson – Linn County Deputy Auditor (phone)
	Susan Chambers – IDR Property Tax	Ted Nellesen – DOM Local Government	Kim Veeder – Black Hawk County IT Director
	Darrell Fremont – DAS ITE	Randy Ripperger – Polk County Assessor's Office	Beth Weeks – Cedar Rapids Chief Deputy Assessor
	Jeff Garrett – Washington County Treasurer	Julie Riesselman - Tyler	Jeanean Willems – Tyler
	Carrie Johnson – Local Government DOM	Julie Roisen – IDR Property Tax Division Administrator	
	Dianne Kiefer – Wapello County Treasurer	Rodney Ross – Cerro Gordo County Programmer	

Agenda topics	Notes:
1. Opening Remarks / Introductions	<ul style="list-style-type: none"> • Meeting opened up with introductions of attendees. • A revised agenda was distributed: <ul style="list-style-type: none"> Website Application Demonstration Test Results <ul style="list-style-type: none"> A&A Login Data Format <ul style="list-style-type: none"> Classification File Format Carriage Return Data Integrity – Unique Parcel ID Results Reporting Testing Schedule <ul style="list-style-type: none"> Pilot Jurisdictions Full State Testing Schedule Vendor Meeting – BPTC Retirement Discussion Other Questions or Concerns Next Meeting Date, Agenda, and Location

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<p>2. Website Application Demonstration</p>	<ul style="list-style-type: none"> • The demonstration included: <ol style="list-style-type: none"> 1) Uploading a county file to the website. 2) Validation of the county file. One test file included a correctly formatted file and showed acceptance into the database. One file tested an incorrectly formatted file and showed messages and action items required in this situation. 3) Downloading a file from the website that contained BPTC numbers. 4) Uploading a file with records to retire. Messages were displayed to accept the new record and retire the prior record, or to not accept the new record. • Discussion of the testing process and results followed.
<p>3. Testing Results</p>	<ul style="list-style-type: none"> • Testing Results – 22 counties submitted files on November 19. • Three issues were identified (details on each follow). One required additional programming on the state side to resolve. Testing was halted until this was completed • Testing will resume on Nov 21.
<p>4. Testing Results – A & A Login and help</p>	<ul style="list-style-type: none"> • The login is tied to the county. • If a county has an A&A Login, do not create a new one. Not sure if a county has a login – Click the “Recover Enterprise A & A Account” tab on the website home page, enter your email. If there is an account tied to this email it will be shown. If not, set up an account. • If locked out, the county needs to follow instructions on the A & A screen to reach the state help desk to unlock the account.
<p>5. Testing Issues: Data Formatting – 3 issues</p>	<ul style="list-style-type: none"> • Issue 1: Classifications must be in all caps with no abbreviations, as described in the file format information. Otherwise the file is rejected and must be resubmitted. This must be corrected on the county side. • Issue 2: Invisible Carriage Returns in county files. This issue has been resolved. In some cases county files included a carriage return between rows of the CSV files. The return does not show as a character in the file, but its presence caused errors in reading the file. Coding on the state side was required to resolve it. This has been completed by IDR. Nothing is needed on the county side. • Issue 3: Opening a CSV File in Excel changes the unique parcel id # for numbers that begin with leading zeros or other numbers. This is an issue that must be resolved on the county side. Once the number is changed in Excel, it cannot be changed back again. This results in files that no longer contain the unique parcel identifier that links to the county’s internal data system. Resolution options discussed at the meeting include training staff at the county to resolve this issue by opening files in Notepad instead of Excel, or add an alpha character in front of the Unique Parcel Identifier in the CSV file. No decision on how to address this was determined as this must be determined by the county/vendors.
<p>6. Results Reporting</p>	<ul style="list-style-type: none"> • IDR will report results of Nov 19 testing to each county and to each vendor.
<p>7. Testing Schedule</p>	<ul style="list-style-type: none"> • Pilot county testing will continue November 21. • Full State testing will be conducted the week on December 2. Approximately half the counties will test December 3, the other half December 5. • Full State test results will be discussed with vendors on Monday December 9. • Any retest required will be conducted on December 10

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	<ul style="list-style-type: none"> Any outstanding issues will be addressed December 11 – 13. Our goal is to move the BPTC Unit Identification Generator into production on December 16. The last day to upload a file from the county for this tax credit cycle is January 24, 2014.
8. Vendor Meeting – Retirement Discussion	<ul style="list-style-type: none"> IDR will coordinate conference calls with each vendor prior to the next meeting.
9. Other Issues/Concerns	<ul style="list-style-type: none"> Time was not available today to discuss the draft rules distributed to the group on November 19. The notice date for the rules will be November 27. The public hearing for the rules will be December 17.
10. Parking Lot	<ul style="list-style-type: none"> Does the application accept single digits without leading zeros, or are the leading zeros truncated when the file is opened in Excel?
11. Next Meeting Location	<ul style="list-style-type: none"> Thursday December 12, 10:00 – 12:00 ISAC Offices, West Des Moines, IA
12. Agenda Items for next meeting	<ul style="list-style-type: none"> Discuss Full State Testing Going Live with the BPTC Unit Identification Generator Application Retirement Process in future years Draft Rules

#	ACTION ITEMS	RESPONSIBLE	DUE DATE
1	Address CSV File Issue when counties open the file in Excel	Vendors	12-2-13
2	Resume pilot county testing November 21	Julie Roisen	11-21-13
3	Provide full state testing instructions to all jurisdictions	Julie Roisen	11-22-13
4	Meet with vendors to discuss retirement process and requirements	Julie Roisen	11-22-13