

Meeting Agenda/Minutes

Senate File 295 Implementation Advisory Panel

DATE: THURSDAY, DECEMBER 12, 2013
 TIME: 10:00 A.M. – 2:40 P.M.

LOCATION: ISAC CONFERENCE ROOM

FACILITATOR	Lucas Beenken / Julie Roisen		
ATTENDEES	Mike Albers – Polk County Auditor's Office	Ryan Lafrenz – Polk County Auditor's Office	Deb Kout - Solutions
	Marsha Carter – Shelby County	Joel Rose - Solutions	Monica Peterson - Solutions
	Darrell Fremont – DAS-ITE	Nicole Maakestad – Marshall County Programmer	Sandy Shonka – Cerro Gordo County Auditor's Office (phone)
	Carla Becker – Delaware County Auditor		Ed Saunders Cedar Rapids Assessor's Office
	Lucas Beenken – Public Policy Specialist	Dale McCrea – Muscatine County Assessor	Janine Sulzner – Jones County Auditor
	Mark Castenson – Linn County Assessor's Office		Gordon Thompson – Linn County Deputy Auditor (phone)
	Susan Chambers – IDR Property Tax	Ted Nellesen – DOM Local Government	Kim Veeder – Black Hawk County IT Director - phone
	Darrell Fremont – DAS ITE		Beth Weeks – Cedar Rapids Chief Deputy Assessor
		Julie Riesselman - Tyler	Jeanean Willems – Tyler
	Carrie Johnson – Local Government DOM	Julie Roisen – IDR Property Tax Division Administrator	Jamie Cashman - ISAC
Dianne Kiefer – Wapello County Treasurer - phone	Rodney Ross – Cerro Gordo County Programmer	Deb McWhirter – Butler County - phone	

Agenda topics	Notes:
1. Opening Remarks / Introductions	<ul style="list-style-type: none"> Meeting opened up with introductions of attendees. Agenda was distributed: <ul style="list-style-type: none"> Test Results CVS/Excel File Unique Parcel ID Issue Strategy Discussion: Splits and Combines Lunch Administrative Rules Discussion Other Questions or Concerns Next Meeting Date, Agenda, and Location
2. Test Results	<ul style="list-style-type: none"> Reviewed Testing Video: watching the video did generate process questions which were answered as to the validation process and notification exchanges when in production. IDR provided explanation on the test plan provided for the counties which anticipated possible problems with validations and provided reasons for failures and suggestion on how the files can be resolved for successful upload and validation leading to BPTC ID generation. Further explanation on how to download the completed file and how prior and current assessment year files will be available. Discussion on duplicate parcel IDs. If the county downloads the completed file and uploads to the local system, new applications coming after January would only be exported from the local system for BPTC ID generation.

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	<ul style="list-style-type: none"> • User Acceptance testing, Assessor and County IT people went through the upload validation process. Overall the testing was successful. A map indicating all the counties that have completed testing and there are a few that have not tested and these are being planned to complete. 5 counties are shown as failed. Testing is expected to be completed this week if at all possible. • Full file testing map indicates that many succeeded with 5 counties that are in the planning stages to complete the test. 23 counties results of the errors were sent out for mitigation of the problems with the file. • Discussion on the two sessions of testing. UAT was for testing and training and the full file test was to indicate any problems with the full file upload to begin mitigation for corrections needed to be applied to the county full file. • Go Live discussion: Group was asked when the web application for BPTC should be placed in production. Caution for the roll out is that the staging environment will need to go off line. Log on access for counties ready to upload production files will be turned off in Staging. Suggestion was to prepare the files for download with the BPTC Credit ID included for county review, IDR will run in staging. Decision by the group was to proceed with the production database and web application next week.
<p>3. CVS/Excel File Unique Parcel ID Issue</p>	<ul style="list-style-type: none"> • Vendor Report: Solutions indicated that they worked with the county having the issue and this has been resolved. Tyler working with multiple counties to resolve export problems, Blackhawk had the 0 drop in the DM County Code and they will fix the issue.
<p>4. Strategy Discussion: Splits and Combines</p>	<ul style="list-style-type: none"> • Diagram was distributed to begin the discussion. There are two ways that these could be dealt with for 2013 Assessment year. Vendor input will be critical for the solution. The BPTC ID has been assigned and a split or combine happens between Jan 24 and June 30, 2014. A new upload would be required for the Parcel A1 and A2 out of Parcel A. Parcel A would need to be retired or ignored to resolve. A1 and A2 would receive new BPTC IDs. This is part of the Data Elements file. Discussion on how counties retire parcel numbers and choices on how the county wants to manage at the county level. Parcel A could also be submitted with a blank Aggregation Indicator which would retire the record. Discussion on relationship of A to A1 and A2 of the BPTC ID could include references to Parcel A BPTC ID. IDR has decided that at this time the system would not manage the history of splits and combines. More explanation on Retire and Ignore during the Data Elements phase for calculation of the credit and the Needs Review indicator and explained different scenarios for actions. The data elements release will also include ability for reporting and query to reduce the amount of records the county will need to resolve for retire or ignore. • Combine: 2 units and each unit have a credit. If it is combined, a single credit would be issued. It was suggested that to leave for that assessment year and work again in the next assessment year. • Reconciliation of the local system of retired BPTC ID on the state system will need to be done through the report and work to retire the ID on the local system so the record does not continue to show up in the next file upload. • 2014 Assessment Year re-application process: Parcel A1 and A2 resolve for AY14. Use query tool to look for BPTC ID to bring up both records. Criteria on the transfer of ownership or unit changes will need to be looked at as one or both of the units may need to reapply for credit in AY14. The units may be entered with new Aggregation Indicators for AY14 and new BPTC ID for new applications for AY14. • July 2014 through March 15, 2015 submissions, timing of the submission will determine if the auditor file or the assessor file will be

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	<p>uploaded. This assumes the BPTC ID is the same in both files. Tyler system handles by year and not by type of file. Solutions system does not see an issue with this process. AY13 is a whole file, after that partial submission is really all that is needed, although the state system will handle whole file submissions moving forward.</p> <ul style="list-style-type: none"> • Discussion on ability to retire in the state system and not require a new file uploads indicated that local systems and the state system will be out of sync. Timing of the cross year's application complicates the issue. Information from the counties is that applications are generally processed once a year. Discussion on the duplicate UPID with different year BPTC ID, Issue found with Aggregation Indicator being absent. • State system query function will be for reporting of issues only and the issues are resolved [retired or modification of sequence and counts] in the local system and a new file submission will be required to resolve in the new system. This can be done through data elements submission or the BPTC ID generation process. • Download file options, whole file, BPTC changes by year, BPTC new by year, active by year, inactive by year, • Queries: Reconciliation Report by Unit, Year, UPID, BPTCID, Active, and Inactive by date range submitted. Report output options will be PDF, CSV, Excel • Question on processing by separate years and audit, the law requires IDR audits the BPTC eligibility by the IDs. • New Data Elements Submissions: no new for AY13 after June 30, 2014, discussion on local submission files for AY14 to begin after July 1, 2014.
5. Lunch	<ul style="list-style-type: none"> •
6. Administrative Rules Discussion	<ul style="list-style-type: none"> • Rules were noticed on November 27th. First hearing was Tuesday December 10th; one written comment suggested many changes some of which is not in alliance with the legislation and so will not be incorporated. IDR and the Assessor's group have suggested some language changes. Second public hearing will be held 12/17/13 and changes can be submitted and the next round will be completed afterwards. Question on exempted parcels moving to taxable. Question of assignment of value and any excess credit. The question/example will be submitted in writing for further review. This pertains to sale of church property. IDR will review and compare to the statute. • Question, page 4 Assessor will maintain a permanent file and send notice that the permanent file has been changed; this does not need to be files to the taxpayer. Page 7 under I, notices of a disallowed credit by a sale is not a denial and is avoidance. A denial is when an application is determined to be invalid. Confusion is does the sale nullifies the original credit and perhaps a notice needs to be sent. IDR to take back to the attorney's for opinion. • Another notice from ARRC is required and the group may send Lucas comments that can be compiled and sent to IDR.
7. Replacement Claims	<ul style="list-style-type: none"> • Vendor needs discussion. Replacement Claim seems to be pretty straight forward other than TIF. The payments would be made March and September. The question is on the roll back and TIF. Within the next two weeks, IDR will attempt to coordinate with DOM and Mike Albers on the different scenarios for calculation of the replacement claim. It was suggested that the claim calculation be on the base and not the increment. A legal opinion will be needed, the report for the TIF will be both the increment and the base, but the valuation will be only the base. The opinion will need to be done soon to enable time for the vendors to program.
8. Other Questions or Concerns	<ul style="list-style-type: none"> •
9. Parking Lot	<ul style="list-style-type: none"> •
10. Next Meeting Location	<ul style="list-style-type: none"> • January 10, 2014 10:00 – 12:00 @IASC in West Des Moines

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	ISAC Offices, West Des Moines, IA
11. Agenda Items for next meeting	•

#	ACTION ITEMS	RESPONSIBLE	DUE DATE
1			
2			
3			
4			