

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

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

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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		