



# COUNTY OF EL DORADO

PTARP

330 FAIR LANE PLACERVILLE, CA 95667

**DATE:** April 30th, 2019

**FROM:** Karl Weiland, Assessor

**TO:** Sue Novasel, Chair of the Board of Supervisors  
Don Ashton, Chief Administrative Officer

**SUBJECT:** Property Tax Administration System Replacement Project (PTARP)  
Update

The previous update on October 30<sup>th</sup>, 2018 reported that:

## **Tax Collector**

1. All Tax Roll data has been successfully converted and validated.
2. CORTAC file programming and upload processes are complete.
3. Current Unsecured Tax Bill payments are being taken in the system on-line, at the counter, and by phone.
4. Our new secured tax bill file format along with our secured tax bill data received back from the print vendor and approved
5. We are on track to mail Secured tax bills on or before November 1<sup>st</sup>. They are available on line now.
6. All back payments being held during the transition process have been entered into the system.
7. The web tax bill inquiry and payment module is available to the public for current unsecured and current secured bills.
8. The Tax Collector has been transitioned from implementation staff to support staff for issue resolution.

## **Auditor**

1. The first extension of secured tax roll data to the Tax Collector was successfully completed.
2. Megabyte is continuing to assist us with calculation and configuration changes from improperly loaded resource table files.
3. The Auditor is configuring the automated apportionment resource tables.
4. The Auditor has been transitioned from implementation staff to support staff for issue resolution.

## **Assessor**

1. Personal Property data is down to a few minor details on Megabyte's virtual server. Once they have our approval, a clean load of Personal Property/Business data will be uploaded into our local system for final validation.
2. Training for online business property filings (OBPF), and for Personal Property will occur once we have Personal Property data.
3. We are down to a few remaining critical assessment roll data issues which should be resolved in the next two weeks.
4. The Assessor staff is participating in multiple hands on training sessions with our live data.

5. When the remaining issues are resolved, and training is completed, all users will be hands on working in the system.

#### **Clerk of the Assessment Appeals Board**

1. MPTS has been notified that training needs to be scheduled for the Assessment Appeals staff in the Clerk of the Board's office.

#### **IT**

1. The Property Tax Legacy system is complete and available to all 3 departments for history inquiry.
2. The server and applications for all Megabyte web modules have been configured
3. A test environment is configured and ready to go. As soon as we have good personal property data, we will complete our first copy from production to test. The test environment will be used to validate procedural and processes prior to effecting changes on actual production data. It will also be useful to test program modifications implemented by the vendor
4. The interface for transfer of Records data has been validated and is up and running
5. The ACI credit card payment processor is implemented and now being used for tax payments on line, at the counter and by phone.

Since the last update, the following has been accomplished:

1. The secured bills were mailed on time. The first and second installments are being collected and processed in the new system.
2. All three property tax departments are operating in the new system.
3. There are several remaining issues that the vendor is working to resolve.
4. Building permit and final data from Trakit is now being uploaded into Megabyte for use by the appraisers.
5. The clerk of the Assessment Appeals Board (AAB) has received training and is using the module for the 2019 AAB hearings.
6. The project manager continues to monitor help desk tickets and requests to the vendor for problem resolution. The contract has been extended through the end of 2019 to insure that we have this resource available through the remainder of the business cycle.
7. The vendor recently announced that an update currently schedule for the fall of 2019 will contain enhancements to visual content and program security.

Anticipated remaining activities thru the end of the calendar year:

1. The project manager and key team members from all three departments and IT will continue to meet on a regular basis.
2. As issues are identified with resource tables and other system configuration tools, they will be reviewed and corrected.
3. Training will continue using both Megabyte and County facilities.
4. The Assessor has requested and been approved to close the 2019/2020 assessment roll on July 31<sup>st</sup>. This will provide an additional month to insure that all 2018 assessment work is properly reflected in the new system.
5. An agency access module will be deployed to give additional information to internal county and local agencies.
6. The Assessor, Auditor and Tax Collector will continue to establish processes to improve the effective use of the system.
7. All departments will be reviewing and developing both internal and external reports, taxpayer notifications and other processes.
8. Any remaining issues with interfaces (API's) will be resolved.
9. The Assessor has an opportunity to join with other MPTS Users in acquiring access to a User Manual developed by San Joaquin County Assessor. Discussions are ongoing.

10. The vendor has been paid for two of the five milestones under our agreement. It is anticipated that the remaining three milestones will be fully completed and payment processed prior to the end of the calendar year.

In conclusion, the departments are using the new system and processing through the first business cycle. There are still several outstanding issues that each of the three departments will continue to resolve. The vendor has been responsive and cooperative. We anticipate that a full and complete transition will take a few years; however, we are off to a good start.