



# COUNTY OF EL DORADO

# PTARP

330 FAIR LANE PLACERVILLE, CA 95667

**DATE:** September 11th, 2018

**FROM:** Karl Weiland, Assessor

**TO:** Board of Supervisors, Michael Ranalli, Chair  
Don Ashton, Chief Administrative Officer

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

The previous update on January 18th reported that:

1. Process mapping sessions for the Assessor and Auditor are almost complete with a good portion of the mapping done and ready for review this month. Tax Collector processes were delayed due to increased workload last month, but it is anticipated that process mapping will be concluded shortly.
2. MPTS conversion staff is actively working on parcel data as well as Auditor roll extension and tax roll data sets, seeking clarification and input from County subject matter experts as they make progress toward configuring our system and converting our data.
3. A data conversion team is now meeting on an "as needed" basis to assist MPTS with technical conversion issues.
4. The Assessor attended the annual MPTS Business meeting.
5. The project manager and team staff are meeting with other County departments to insure Application Process Interfaces (API) are in place to insure non property tax user department data needs are met.
6. Assessor staff participated in Williamson Act and Timber Production Zone assessment workshop held on-site by MPTS.
7. Tax Collector staff attended a demonstration and overview of the Transient Occupancy Tax (TOT) module being developed by MPTS.
8. Software installation is under way and expected to be completed shortly.

Since the last update, the following has been accomplished:

- 1) All software installation and server configuration is complete and security protocols have been established. The system is operating as expected. Staff is working in the new system.
- 2) Most Application Process Interfaces (API's) have either been validated or deployed or are in final testing stages.
- 3) The 2018/19 assessment roll work was completed on June 7<sup>th</sup>, 2018. The roll was closed in M204 for the last time. Access to M204 was terminated for all staff. The 2018/19 roll values were converted to Megabyte's format, reconciled and loaded around the middle of July.
- 4) The unsecured roll was subsequently extended **with only minor issues** and the unsecured bills were mailed last week.

- 5) There ~~were~~ are some difficulties with the preparation of the file used by agencies to prepare the direct charges for the Auditor. ~~Despite these delays, it is expected that the secured tax roll will be prepared and bills mailed by the November 1 statutory deadline.~~ Despite these delays, it is expected that the secured tax roll will be prepared and bills mailed by the November 1 statutory deadline.
- 6) The Auditor should begin extending the secured tax roll this week.
- 7) The Tax Collector is prepared to process unsecured tax bill payments and collections through the new system.
- 8) ~~A significant amount of training has been given to staff from all three offices. Initial training has been given to staff from all three offices.~~
- 9) Staff from Megabyte is working to load the Assessors history.
- 10) All M204 history back to 1988 has been converted into a database developed and programmed by IT staff. It has been deployed within the County and is being used in lieu of M204.
- 11) The Assessor has established a training database to insure all staff has received the appropriate training.
- 12) The Assessor is beginning work on the 2019/2020 roll in conjunction with appraisal suite training conducted at the Megabyte facility in Rocklin.

Anticipated remaining activities thru the end of the year:

- 1) The project manager and key team members from all three departments and IT will continue to meet on a regular basis.
- 2) Data conversion staff will continue to meet and resolve issues as they arise.
- 3) As issues are identified with resource tables and other system configuration tools, they will be reviewed and corrected.
- 4) Training will continue using both Megabyte and County facilities.
- 5) The Assessor will continue work on the 2019/2020 roll, using the new system. A communications process has been established to answer staff questions and clear problems in using the new system.
- 6) The Auditor will continue to work on establishing the apportionment ~~of the secured and unsecured property taxes process for property taxes.~~
- 7) The Tax Collector will begin processing unsecured tax bill payments as payments are received.
- 8) All departments will be reviewing and developing both internal and external reports, taxpayer notifications and other processes.
- 9) Any remaining issues with (API's) will be resolved.
- 10) The historical database will be deployed to the public after final testing.
- 11) The Assessment Appeals module will be deployed to the Clerk of the Board and training will be given to staff.
- 12) The Assessor will be working with the Public Information Officer on press releases about the new On-line Business Property Statement filing procedures which will be effective after January 1<sup>st</sup>.
- 13) The Tax Collector has been invited to preview Megabyte's latest version of the TOT module.
- 14) Billing from the vendor for Phases 2, 3,4,& 5 should be approved for payment by the end of the calendar year.

In conclusion, the project is in the beginning stages of post go live implementation. The system is operational and staff is beginning to process work through the new system. As we become more familiar with the system and as issues are identified, they will be resolved. The vendor is cooperative and addressing problems as they arise.