

Real Property Tax Administration Committee

Minutes: Wednesday February 1, 2017

Location: The Indigo (Albany County)

In Attendance

Assessors

- Dennis Ketcham
- Todd Wiley
- Rochelle Harris
- Teri Ross
- Warren Wheeler
- Curt Schoeberl
- David Briggs
- Sue Otis

County Directors

- James Kirsch
- Daniel Martonis
- Suzette Booy
- Jay Franklin
- Eric Axelsen
- Tom Jackson
- Tom Bloodgood

ORPTS

- Tim Maher
- Joe Gerberg
- Christine Bannister
- Geoff Gloak

Additional persons present

- Hannelore Smith
- Paul Miller
- Kelly Anderson

Facilitator: Alan Kresge

Recorder: Jim McGovern

Get Organized

Previous minutes approved

Action Items

- Commissioner Boone's response letter was sent out as requested.
- News Clips are being updated each day by noon.
- Building shell codes were agreed upon by the Valuation/Property Class Code Team (351, 352) and will be placed in RPS when the manual updates are complete. Alan will follow up to determine if the wait is necessary. **Action Item #7**
- Joe stated that the State site for updated law is the official source. 3rd party sites such as First Law are not always current.
- David Briggs, as requested, compiled a list of munis that were not communicated with regarding PDC or trends. Tim responded that ORPTS is looking to reintroduce PDC through meetings and that they will try to produce PDC numbers earlier for more issue resolution.
- Checked with IT regarding Assessment Community passwords and there is a 90-day change requirement
- Windows 10 is safe for V4 users
- The RPS address field change was previously requested by Rick Hubner. ORPTS will research the suggestion to reverse the change. **Action Item #1**

Welcome

Tim announced the reassignment of Susan Savage, the retirement of Theresa Frank, new RPTAC members and the hiring of 7 new RPA trainees throughout the regions.

OSC Audits of Assessor Offices

There was discussion over the fact that OSC has begun conducting audits on some Assessor Offices and that they seem to focus predominately on technical aspects of exemption administration. Assessors raised the issue of public perception of Assessor Offices over reports, even though for insignificant issues. It was suggested that these audits demonstrate the need for exemption administration classes.

Assessors asked for ORPTS to become involved. There was discussion on what an appropriate function for ORPTS would be. ORPTS to determine whether there is a role they can properly serve in this process. **(Action Item #3)**

OSC Audits of Assessor Offices (continued)

There was also a parallel discussion over training needs. There was a request to take exemption administration out of the course on assessment administration and make it its own basic course. In addition, it was suggested to add information to the newly proposed class on meeting the needs of audits of the administration of exemptions. **Action item #2** is for ORPTS to explore the effects of separating the classes.

V5

In the process of working out the contract with the winning bidder. Then it must be approved by OSC. The goal is still for limited release in Fall 2018.

It was asked if locals will be included as part of the development process, especially since so many local services such as 911 operate off of RPS. The response was that RPS Governance will develop a communication plan to get information out to locals.

It was also asked if there will be a contract provision to allow locals to use this procurement for local professional services related to local needs for the system. ORPTS will determine if this is possible **(Action Item #4)**

The next RPS Governance meeting is in March. The charter has been changed. ORPTS now has 6 members- 4 regional and 2 from Albany. County Directors now have 2 members.

Training

Roger read a letter from IAO regarding the extension of their offer to teach basic assessment classes due to the reduction of ORPTS staff. IAO needs to know if classes will be recognized for credits. Tim stated that ORPTS will be willing to work with Cornell instructors this time, but is not looking to replace ORPTS as the source of training. Roger provided the Cornell class schedule.

Reimbursement for NYC AOT

There was discussion over why ORPTS does not reimburse for AoT training and if perhaps if not reimbursement, could course credit be granted? Joe responded that the reimbursement issue was a fiscal decision made years prior out of concern that the law requires reimbursement of any classes for which credit is granted. **Action item #5** is for ORPTS to determine if credit could be granted if attendees sign a reimbursement waiver.

Forms Update

Geoff reported that there will be cyclical review of forms. Ag forms are currently under review. Suggestions were made for the grievance form to be next. There was discussion of the Forms Committee involvement and the possibility of electronic forms.

Budget Update

Joe presented real property related items in the current proposed State budget and upcoming bills. Information was shared on the 0% STAR Cap, Mandatory IVP for ESTAR, the ability to make partial tax payments, oil and gas extender, and a fix for STAR Credit co-op issues.

There was discussion over the mandatory IVP proposal. Assessors had issues with no longer being able to work directly with seniors on income issues and with those who don't file income tax returns. It was suggested that those who file for the senior exemption should be exempt and if not then the income standards for seniors and ESTAR should be aligned.

Paul reported that the main focus of legislation is the budget. There are STAR Credit related bills for repeal of the credit portion of STAR and to add interest charges for checks issued late.

STAR Credit

Tim presented.

ORPTS is currently coordinating three check programs- STAR Credit, PTFC, and PTRC. Over 2.1 million freeze and relief credit checks issued. Over 100,000 STAR Credit checks issued. The PTFC is in its last stage and is phasing out.

Work is being done to improve the administration of the programs. The web app is being updated to collect additional needed information regarding tax filings. Also improving the property search function and making it clearer that incorrect property information will result in check delays.

There was discussion and questions on several topics.

- Have all taxpayers who registered before July 1 been paid? No, many registrations contained incorrect information.
- Are all co-op/mobile home checks out? No, but some are. Working on a better system to receive this information
- Do the checks have the purpose written on them? The purpose is written on the check stub.
- Why do callers receive different answers every time they call? They should not. Answers should be standard.

STAR Credit (continued)

STAR Credit teleconferences were discussed.

There was discussion over the schedule of check issuance when faced with the reality of tax rates, tax bills, and the due date for paying taxes and the fact that taxpayers are not notified ahead of time whether they are receiving Basic or Enhanced STAR.

Additional Items

It was asked if BAR training information (contacts, locations, etc.) could be posted on the website so that it would be easy for BAR members to attend alternate training if they cannot attend their local training.

Action item #6 is for ORPTS to determine if this is feasible and if it is, where to place it.

Wrap Up

Next meeting is June 7 in Queensbury.