

STATE OF INDIANA

DEPARTMENT OF LOCAL GOVERNMENT FINANCE



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TO: County Assessors
FROM: Courtney L. Schaafsma, Director of Data Analysis *els*
SUBJECT: Sales Disclosure Upload Process
DATE: April 18, 2011

This memorandum provides information regarding the reopening of the Sales Disclosure Upload process. This information is intended for those counties that use a third-party vendor to track sales disclosures. Counties that use the State system to track and maintain their sales disclosures will not be impacted by the information in this memorandum. Counties using the State system should continue to input and verify sales disclosures on the State system on an on-going basis, as they are currently doing.

In a March 4, 2011 memorandum, the Department of Local Government Finance ("Department") announced that the SharePoint site for the purposes of uploading sales disclosure files was being temporarily shut down. This temporary closure was designed to allow the Department and the Indiana Business Research Center ("IBRC") to address some technical issues affecting the upload procedure. These issues have now been resolved. As such, **the Department and the IBRC will reopen the SharePoint site for sales disclosures upload on Monday, April 25, 2011.** At that time, counties and vendors can once again post their sales disclosure files to allow the information to be uploaded to the public search tool.

To ensure the SharePoint site and the upload process are successful, the remainder of this memo details specific criteria that must be followed to upload files to the SharePoint site. County files may be rejected if the following criteria are not met.

SharePoint Site for Sales Disclosure Upload

Counties using a third-party vendor to track sales disclosure should periodically (as discussed in more detail below) export the sales disclosure data out of the third-party system and post the data to the SharePoint Site for sales disclosure upload. The SharePoint site can be found at: <http://sp.ibrc.indiana.edu/sites/SDF>. The Department will be sending an email to all counties using a third-party vendor with the appropriate username and passphrase for accessing the site.

All files for upload must go through the SharePoint site. Files directly emailed to the Department or the IBRC will not be accepted.

Once you access the SharePoint site, you will see a folder for your county, assuming your county has indicated to the Department that you are using a third-party vendor. If you do not see a folder for your

county or have other difficulties access the site, please contact the IBRC at ibrctech@iupui.edu with a copy to Philip Bernard at pbernard@dlgf.in.gov.

Sales Date Range to be Uploaded

As discussed in the March 4, 2011 memo, **only sales starting from March 1, 2011 and forward should be included in files for upload once the SharePoint site reopens.** All sales data for the 2010 sales review (sales from January 1, 2010 through February 28, 2011) should be emailed to the Department at data@dlgf.in.gov. The Department is currently working with the IBRC to get compliant 2010 sales datasets posted to the public search tool.

Frequency of Upload

The Department recommends that all counties using a third-party vendor post files for upload to the SharePoint site weekly. This allows the public search tool to be updated on an on-going basis. If your county does not have a sufficient number of sales to warrant a weekly upload, you can use a bi-weekly or monthly frequency at a maximum.

Sales Records Contained Within the Current Submission

Except for the first submission of data to the reopened SharePoint site, **the sales records contained within the files submitted should only include those sales records that are new or have been edited since the last submission of data to the SharePoint site.** This will result in a lower number of records within each submission, allowing for easier identification of errors if the files cannot be uploaded. The first submission to the reopened SharePoint site should include all records from March 1, 2011 to the date of submission.

File to be Uploaded

For each submission of data to the SharePoint site, three files should be created by the third-party vendor software – SALEDISC, SALECONTAC and SALEPARCEL. **These files should be produced in a .txt format. Prior to posting to the SharePoint site, these three .txt files should be zipped together into one bundle.** This allows the Department and the IBRC to ensure that the three files are all associated, a requirement for successful upload to the public search tool. Files not bundled together in one .zip file will not be uploaded.

Naming the Submission

The zip file posted to the SharePoint site should follow the following naming convention:

county name_date of submission (MMDDYYYY).zip

Example zip file names would be Adams_04132011.zip or Fulton_04252011.zip. By including date of submission in the file name, the Department and the IBRC can ensure that the files posted to the SharePoint site for a particular county are processed in a sequential order. This is important in instances in which a record may be edited after its initial submission to the SharePoint site. *The date of submission should be used regardless of whether the files submitted include one week of data or include data for a longer time period.*

File Specifications

The three files included in the .zip file should follow the file specifications outlined in 50 IAC 26. The final file specifications and adopted version of 50 IAC 26 can be found at http://www.in.gov/legislative/iac/iac_title?iact=50.

Errors that May Prevent Sales Data from Being Uploaded

Prior to submitting files for upload on the reopened SharePoint site, counties and vendors should ensure that the three .txt files created by their software program follow the 50 IAC 26 file specifications. While the following is not a comprehensive list, the list below identifies certain errors that may prevent the sales data submitted from being uploaded. Please review this list of common errors before submitting.

- Header record should contain the correct file name – SALEDISC, SALECONTAC or SALEPARCEL.
- County Number or County_ID should be two digits long (examples: 03 or 43).
- County Description should not include the word “County” (examples: Allen or Hancock).
- Contact_Instance_No in the SALECONTAC file must have each instance of a particular type of contact number consecutively. For example, if a particular sale had three buyers, the buyers should be numbered 001, 002 and 003. If the same sale had two sellers, these sellers should be numbered 001 and 002.
- Parcel_Instance_No in the SALEPARCEL file must consecutively number each parcel included on the sales disclosure form. For example, if a particular sale disclosure form included four parcels, these parcels should be numbered 001, 002, 003 and 004.
- SDF_ID must follow the format specified in 50 IAC 26:

“C” + County Number - Sales Year - Unique SDF ID

The SDF_ID must lead with the letter “C” and include the appropriate dashes (examples: C45-2011-0000001 or C58-2011-1234567).

Resubmission of Zipped File

If you have attempted to upload the .zip file as detailed above and believe that the file upload was not successful, you may resubmit the same submission. **However, in resubmitting a file, we ask that you select the “overwrite existing file” when you upload.** This will ensure that we have only one submission of the file, rather than having multiple copies of the same file.

The Department looks forward to reopening the SharePoint site for sales disclosure upload on April 25, 2011. We appreciate your assistance in making the sales disclosure upload process a success by following the procedures outlined above. If you have any question on the information above, please contact Courtney Schaafsma at cschaafsma@dlgf.in.gov or (317) 232-3759.