
STATE OF INDIANA

DEPARTMENT OF LOCAL GOVERNMENT FINANCE



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Indiana Property Tax File Management System

Data Upload and Verification Tool

Instruction Guide

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The Department of Local Government Finance (DLGF), in partnership with the Indiana Business Research Center (IBRC) at Indiana University, has developed a data upload and analysis tool to assist County Governments when submitting county property tax management files to the DLGF. This tool provides a convenient, efficient method for upload of required data files to DLGF.

Purpose

Indiana counties are required to provide property tax management files to the DLGF annually. These files are used as a basis for determining tax rates, local budgets and property tax relief and DLGF is required to analyze and certify data submitted by the counties in a timely manner. DLGF has determined that previous practices for evaluating data submitted by counties did not provide the level of detail required by the County governments to adequately correct deficiencies.

The New Process

This new tool allows for upload of the following required datasets to DLGF (note that each file will need to be compressed and uploaded as a .zip file):

- Parcel data files including PARCEL.TXT, LAND.TXT, IMPROVE.TXT, DWELLING.TXT, BUILDING.TXT, BLDDTL.TXT, and APPEAL.TXT
- Personal property data files including PERSPROP.TXT, POOLDATA.TXT, APPEALPP.TXT, MOBILE.TXT, APPEALMH.TXT, and OILGAS.TXT

- Sales disclosure data file including SALEDISC.TXT
- Tax billing data files including TAXDATA.TXT and ADJMENTS.TXT

The upload tool tests for compliance with established format specifications contained within the published Data Standards as well as tests for obvious errors found in the content of the submitted file. The tool then provides detailed feedback on the compliance and content of the files submitted. This tool provides timely, detailed reports that identify specific anomalies found in data specifications and inconsistencies in data content, for example:

- Each file must have a header record and a trailer record
- All fields should be fixed length
- Left justify all alphanumeric fields
- All numeric fields should have leading zeros
- Assume no decimal precision for all numeric fields without format clarification
- All decimal precision should be implied, for example, for format 3.2, send 12345 (no decimals)
- Yes/No fields should have 'Y' or 'N.'
- All date fields should be in mm/dd/yyyy format
- All fields which reference a Code List should contain a value from the lists provided in the 50 IAC, Article 12 Computer Standards
- Place a negative sign "-" at the far left of the field for all negative numbers
- Parcel Number and GIS Parcel Number should include only numbers, without special characters
- When capturing data other than values specified in the code lists, please send the most appropriate item included in the code list

Requirements Documentation and Data Standards

Format specifications for property tax management files are contained within the published Data Standards available online at www.in.gov/dlgf/rates/standards.html.

Counties should use the 2003A rule for real property (parcel), tax billing (taxdata), and personal property (persprop) and their related files available online at [www.in.gov/dlgf/pdfs/Property Tax Data File Formats \(2003A\).pdf](http://www.in.gov/dlgf/pdfs/Property_Tax_Data_File_Formats_(2003A).pdf).

The 2004A rule should be used for sales disclosures (saledisc) available online at [www.in.gov/dlgf/pdfs/File Formats Revised Sales Disclosure 2004A2.pdf](http://www.in.gov/dlgf/pdfs/File_Formats_Revised_Sales_Disclosure_2004A2.pdf)

Vendor information is available on line at <http://www.in.gov/dlgf/Vendors/>

Original rule provisions: www.in.gov/legislative/iac/T00500/A00230.PDF

Proposed rule provisions: www.in.gov/legislative/iac/T00500/A00230.PDF

Test scenario requirements for vendor certification are available online in <http://www.in.gov/dlgf/pdfs/mergedScenarios0207.pdf>

Testing and Official Submission

- **Test your files first.** Upload and run your data files through the standardized verification and quality control checks to determine what may need to be reviewed and/or corrected prior to officially submitting the files. Counties are strongly encouraged to make use of the testing mode so that any problems can be corrected prior to official submission. The testing mode can be used as many times as necessary to assure the quality and accuracy of the content of the files prior to official submission.
- **Submit Official Files.** After testing files and verifying the accuracy of the content, files can be uploaded as official file submissions to DLGF. The official files are those used by DLGF to determine certification status. Counties are able to submit complete datasets (i.e., both TAXDATA.TXT and ADJMENTS.TXT comprise a dataset), for a one-time submission. All files should be reviewed after submission via testing mode to assure accuracy of the content of the files prior to official submission.

Reports and Feedback

Most of the reports generated by the tool will be provided to the County in a timely manner, generally within 24 to 48 hours of submission. Notification for confirmation of file receipt, and later notification for the availability of the reports, will be sent via e-mail to the officeholders responsible for submission, information system staff, and contacts as identified in each header for each file submitted. These reports can be downloaded and used by County staff and/or contracted vendors to correct any deficiencies found in the file submissions. The reports provided include:

- [Preliminary File Analysis Report](#): This report provides a review of the header file associated with each file uploaded displaying results of testing for compliance with established header format specifications and is delivered with the confirmation email of receipt of a data file.
- [File Detail Report](#): This report provides a detailed review of any noncompliance with established file format specifications as well as any content errors found in each uploaded file. This report provides a listing of errors found by record to facilitate County correction of their files.
- [File Summary Report](#): This report provides a summary count of the kinds of specifications and/or content anomalies found for each file uploaded.

To ensure all data standards are met and to quicken the process from file submission to acceptance, the standards set for these files are checked and flagged for correction.

Part I. Uploading the Files

Each file is uploaded and an initial check after each file is uploaded looks strictly at the headers in each file and provides immediate feedback on any header discrepancies.

Report 1: Preliminary File Analysis Report

- This report provides a review of the header file associated with each file uploaded displaying results of testing for compliance with established header format specifications and is delivered with the confirmation email of receipt of a data file.

Part II. File Content Verification

This part of the process takes the file(s) through batch processing to produce detailed internal file validations, including:

- Ensures correct formatting within the files and checks the format of each cell; checks to make sure there aren't characters in number fields and that addresses and zip codes are correct, etc.
- Matches content to valid list of codes.
- Reviews data integrity.
- Provides summary validation taking into consideration the whole set of data and the logs built by the detailed error checking batch processing. Checks for how many records have bad parcel IDs, tax districts that don't exist, records where land plus improvement do not sum to the total value, etc. Summary validation also looks at whether the total assessed value of the taxing district, Township and County matches the budget data that is also submitted by the County.

Report 2: File Detail Report

- This report provides a detailed review of any noncompliance with established file format specifications as well as any content errors found in each uploaded file. This report provides a listing of errors found by record to facilitate County correction of their files. The upload tool generates a companion comma separated values (.csv) file suitable for sorting.
- Not all problems will result in eventual rejection of this file, but it is recommended that all of these problems be addressed if possible. For details of error codes, reference http://www.in.gov/dlgf/local/PARCEL_error_codes.html

Report 3: File Summary Report.

- This report provides a summary count of the kinds of specifications and/or content anomalies found for each file uploaded. Counties can use this file to easily identify systemic problems where the entire content of a field is identified as invalid as well as a count of records with sporadic anomalies. The upload tool generates a companion comma separated values (.csv) file suitable for sorting.

Each individual file submitted will generate the reports as described above. Reports generated through this tool will remain on the system for the County Assessors and Auditors to view at any time. Test reports will be replaced with updated versions of the reports upon upload of a new file.

Files to be Uploaded by the Assessor and Auditor			
Personal Property Data Set	Real Property Data Set	Tax Billing Data Set	Sales Disclosure
APPEALMH	BLDDETL	ADJMENTS	SALEDISC
APPEALPP	BUILDING	TAXDATA	
MOBILE	DWELLING	<i>These two files are uploaded by the County Auditor</i>	
OILGAS	IMPROVE		
PERSPROP	LAND		
POOLDATA	PARCEL		
	APPEAL		

Important Requirements for Uploading Files:

1. Each individual file must be zipped (compressed and saved as a .zip file) – do not zip multiple files.
2. Compression (zip) utilities abound and a list of free or fee utilities are widely available – please check with your IT department or vendor to ensure you have access to a ZIP (or compression) utility. For example, there is a list of compression utilities with descriptions and reviews available on the C/Net website at <http://www.download.com/3150-2250-0-1-1.html>.
3. The County Assessor is responsible for uploading all but the ADJMENTS and TAXDATA files, which are the responsibility of the Auditor.

Uploading Data to DLGF

4. **Prepare your files.** Each individual text file (as listed on page 4 of this document) must be individually compressed as a .zip (also known as zipped) file. The filename will be that of the original file – for example, BLDDETL.txt is zipped using a compression utility and would be named BLDDETL.zip.
5. **Have your login ID handy.** DLGF has provided each **County Assessor** and **County Auditor** with an authorized, secure username and password for use with this system. County Officials are responsible for activity using their username and password.
6. **Open** your internet browser.
7. On the web, go to www.in.gov/dlgf/local/PropertyDataUploadApp.html. You may want to add this web site in your favorites.

8. The first DLGF Property Data Upload web page will open in your browser.

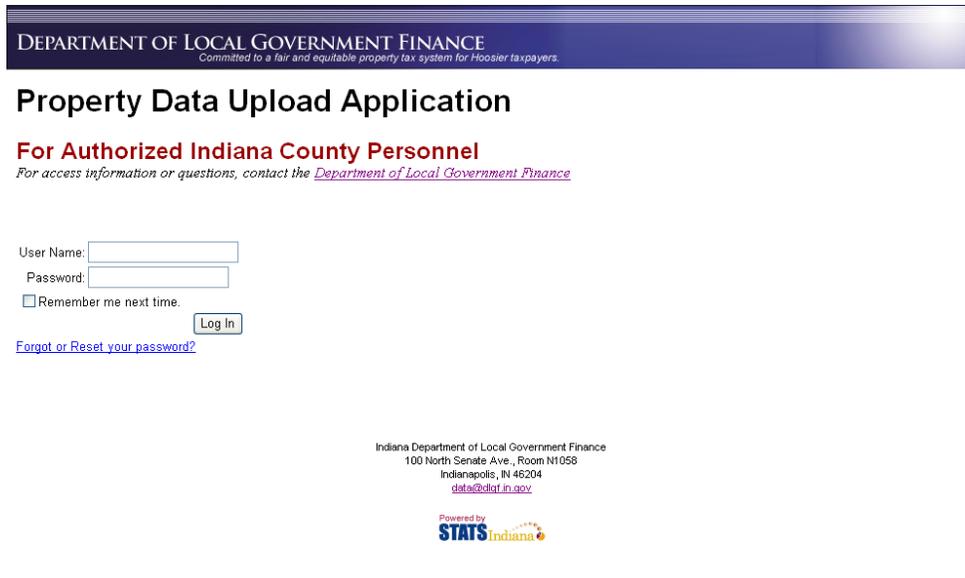


This page describes the process and provides access links to data standards and other documents to help you with the process.

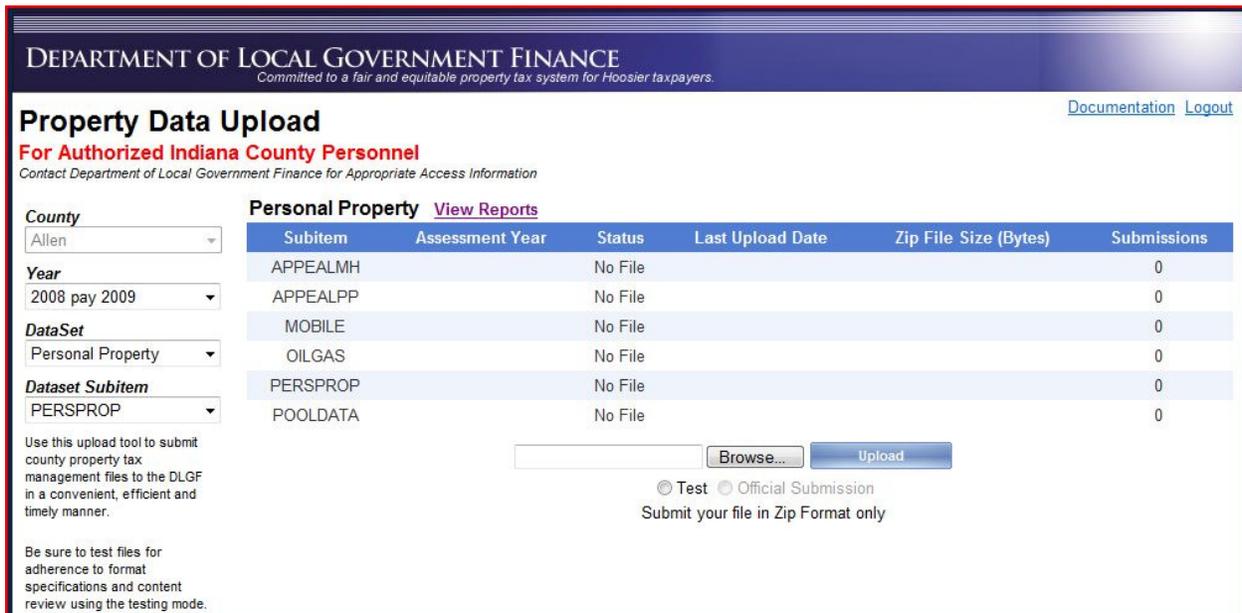
This page has the very important link to the login page – it is called “Go to Upload Application” and is on the right hand side of the page. You will want to bookmark this page by saving this location to your “favorites” in your web browser.

9. **Click the Go to Upload Application link.**

10. The Authorized Login page will open in your browser



11. Enter your assigned **User Name** and **Password**. The user name and password must be one assigned by DLGF. See the section on acquiring a username and password from DLGF if you need to obtain a one, or if you have forgotten your password.
12. Successful login gets you to the Property Data Upload page.



13. **Follow these steps for uploading individual files.** Note that each file will need to be uploaded separately.
 - a. On the left side of the screen you will see several drop-lists. **Select** the appropriate **Year** for the submission using the drop-list.
 - b. **Select** the **Dataset** for the submission using the drop-list.
 - c. **Select** the **Dataset Subitem** you will be uploading using the drop-list.

Property Data Upload

For Authorized Indiana County Personnel

Contact Department of Local Government Finance for Appropriate Access Information

County
Adams

Year
2006 pay 2007

DataSet
Personal Property

DataSet Subitem
PERSPROP

Use this upload tool to submit county property tax management files to the DLGF in a convenient, efficient and timely manner.

Be sure to test files for adherence to format specifications and content review using the testing mode.

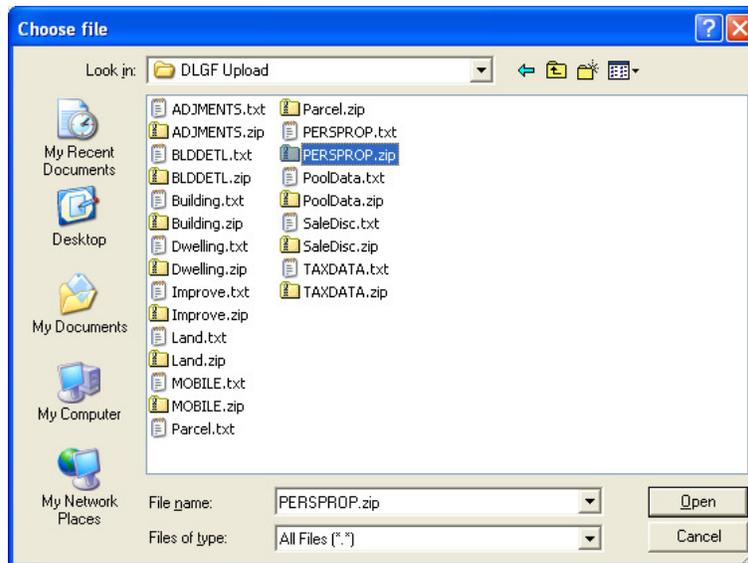
Personal Property

Subitem	Assessment Year	Status	Last Upload Date	Zip File Size (Bytes)	Submissions
PERSPROP		No File			0
POOLDATA		No File			0
APPEALPP		No File			0
MOBILE		No File			0
APPEALMH		No File			0
OILGAS		No File			0

[View Reports](#)

Test Official Submission
 Submit your file in Zip Format only

- d. **Click** on the **Browse** button to locate the file on your computer. A standard windows browser is displayed and you will need to use the browser Look in: drop-list to navigate to the location of the desired zipped file. And then click on the .zip file to be uploaded.



- e. **Click** “**Test**” or “**Official Submission**” located beneath the Browse button. Because Official Submissions are one-time submissions, you will be asked to confirm all Official Submissions prior to uploading the file.
- f. **Click** on the **Upload** button. Most files will upload quite rapidly, but if the .zip file is large the upload may take a few moments. Once uploaded the Assessment Year, Status, Last Upload Date, Zip File Size, and number of Submissions will be displayed on the screen.

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Committed to a fair and equitable property tax system for Hoosier taxpayers.

[Documentation](#) [Logout](#)

Property Data Upload

For Authorized Indiana County Personnel

Contact Department of Local Government Finance for Appropriate Access Information

County
Hendricks

Year
2006 pay 2007

DataSet
Personal Property

DataSet Subitem
PERSPROP

Use this upload tool to submit county property tax management files to the DLGF in a convenient, efficient and timely manner.

Be sure to test files for adherence to format specifications and content review using the testing mode.

[View Reports](#)

Subitem	Assessment Year	Status	Last Upload Date	Zip File Size (Bytes)	Submissions
PERSPROP	2006	Report Produced Test	2/15/2008 4:25:38 PM	295964	1
POOLDATA	2006	Report Produced Test	2/15/2008 4:26:12 PM	153977	1
APPEALPP		No File			0
MOBILE	2006	Report Produced Test	2/18/2008 1:09:00 PM	28752	1
APPEALMH		No File			0
OILGAS		No File			0

Test Official Submission

Submit your file in Zip Format only

14. **Immediate Feedback.** Feedback will appear on your screen to indicate which parts of the header verification passed or failed. You will also receive a confirmation e-mail for each file uploaded and the header verification reports will be available to you under “View Reports”.

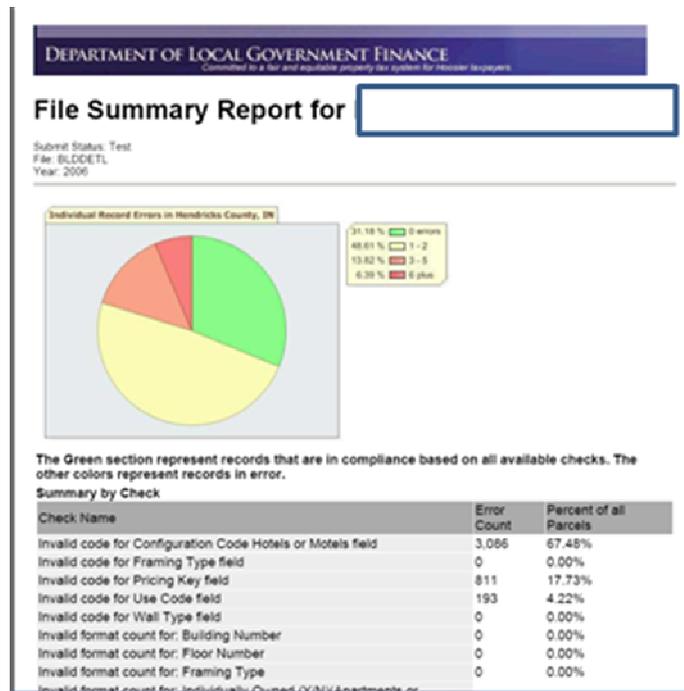
Preliminary File Analysis

County: Adams
Year: 2006 pay 2007
Dataset: Sales Disclosure
Subitem: SALEDISC
Status: Test Submission on 2/19/2008 2:55:57 PM

1. Header Field Name Check

Header Field Name	Status	Value in File
Filename:	✓	Filename: SALEDISC
County Number:	✓	County_Number: 1
County Description:	✓	County_Description: ADAMS
LCM:	✓	LCM: 1.01
File Format ID:	✓	File_Format_ID: 2004A
County Contact Name:	✓	County_Contact_Name: Judith_E_Affolder

15. **Detail and Summary Reports.** Additional reports will be generated after the file has completed the validation and verification process. You will be notified via e-mail when the report(s) are ready. These reports will also be available to you shortly after uploading the file, generally within 24 to 48 hours.



16. When you have completed uploading your files, **click** the **Logout** link located in the upper right hand corner of the screen, to quit the application.

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Property Data Upload

For Authorized Indiana County Personnel
Contact Department of Local Government Finance for Appropriate Access Information

[Documentation](#) [Logout](#)

[View Reports](#)

County	Subitem	Assessment Year	Status	Last Upload Date	Zip File Size (Bytes)	Submissions
Hendricks	PERSPROP	2006	Report Produced Test	2/15/2008 4:25:38 PM	295964	1
	POOLDATA	2006	Report Produced Test	2/15/2008 4:26:12 PM	153977	1
	APPEALPP		No File			0
	MOBILE	2006	Report Produced Test	2/18/2008 1:09:00 PM	28752	1
	APPEALMH		No File			0
	OILGAS		No File			0

Use this upload tool to submit county property tax management files to the DLGF in a convenient, efficient and timely manner.

Be sure to test files for adherence to format specifications and content review using the testing mode.

Test Official Submission
Submit your file in Zip Format only

The reports are generated based on the content of the files submitted. You are strongly encouraged to use these reports to help correct your file submissions. The more accurate your files the easier the certification process will be. Remember that you can upload your files again after each set of corrections are made to ensure the files meet the standards before you are ready for Official Submission.

That's it! This process can be used over and over again, particularly as you TEST the files and receive feedback on what needs to be corrected.

With this process, file transfer to DLGF and the certification process is intended to run more efficiently and quickly.

Please contact DLGF via e-mail at data@dlgf.in.gov with your questions or if you need assistance.

Important Notes on Test vs Official Submissions:

1. Counties may TEST their files as often as required to find data anomalies for correction, prior to Official Submission.
 2. Counties may submit individual files in TEST mode. When doing so only reports specific to that file are valid. Reports that require verification between multiple files will be generated based on data available in the test space as of the upload session.
 3. When submitting data for Official Submission all files for a given dataset **must** be uploaded during the same session. The parcel dataset requires seven .zip files be submitted together (PARCEL, LAND, IMPROVE, DWELLING, BUILDING, BLDDETL, and APPEAL). The personal property dataset requires six .zip files be submitted together (PERSPROP, POOLDATA, APPEALPP, MOBILE, APPEALMH, and OILGAS). The sales disclosure dataset requires only one .zip file (SALEDISC), and the tax billing dataset requires two .zip files (TAXDATA and ADJUSTMENTS). As defined in the Data Submission Standards, if a County does not have records for a given data file the County is required to submit a header and trailer for the file with 0 records listed in the trailer. This is to assure no data file was inadvertently forgotten for submission. A County's failure to submit a full dataset to DLGF as an Official Submission will result in a rejection of the entire dataset.
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Viewing and Downloading Reports

1. **Open** your internet browser.
2. On the web, go to www.in.gov/dlgf/local/PropertyDataUploadApp.html.
3. The first DLGF Property Data Upload web page will open in your browser.
4. **Click** the **Go to Upload Application** link.
5. The Authorized Login page will open in your browser
6. Enter your assigned username and password.
7. Successful login gets you to the Property Data Upload page.

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Property Data Upload [Documentation](#) [Logout](#)

For Authorized Indiana County Personnel
Contact Department of Local Government Finance for Appropriate Access Information

County:

Year:

DataSet:

Dataset Subitem:

Use this upload tool to submit county property tax management files to the DLGF in a convenient, efficient and timely manner.

Be sure to test files for adherence to format specifications and content review using the testing mode.

Personal Property [View Reports](#)

Subitem	Assessment Year	Status	Last Upload Date	Zip File Size (Bytes)	Submissions
PERSPROP	2006	Report Produced Test	2/15/2008 4:25:38 PM	295964	1
POOLDATA	2006	Report Produced Test	2/15/2008 4:26:12 PM	153977	1
APPEALPP		No File			0
MOBILE	2006	Report Produced Test	2/18/2008 1:09:00 PM	28752	1
APPEALMH		No File			0
OILGAS		No File			0

Test Official Submission

Submit your file in Zip Format only

- To view reports **click on View Reports** on the Property Data Upload screen.
- A list of reports available for your County will appear.

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[back to upload tool](#) [Logout](#)

File Download Hendricks County

To download a file, simply click on a link.

[32_Hendricks_2006_ADJMENTS_test_detail_a.csv](#)
[32_Hendricks_2006_ADJMENTS_test_detail_b.csv](#)
[32_Hendricks_2006_ADJMENTS_test_detail_summary.csv](#)
[32_Hendricks_2006_ADJMENTS_Test_detail_summary.pdf](#)
[32_Hendricks_2006_BLDDETL_Test_detail_a.zip](#)
[32_Hendricks_2006_BLDDETL_Test_detail_b.csv](#)
[32_Hendricks_2006_BLDDETL_Test_detail_summary.csv](#)
[32_Hendricks_2006_BLDDETL_Test_detail_summary.pdf](#)
[32_Hendricks_2006_BUILDING_Test_detail_a.csv](#)
[32_Hendricks_2006_BUILDING_Test_detail_b.csv](#)
[32_Hendricks_2006_BUILDING_Test_detail_summary.csv](#)
[32_Hendricks_2006_BUILDING_Test_detail_summary.pdf](#)
[32_Hendricks_2006_DWELLING_Test_detail_a.csv](#)
[32_Hendricks_2006_DWELLING_Test_detail_b.csv](#)
[32_Hendricks_2006_DWELLING_Test_detail_summary.csv](#)
[32_Hendricks_2006_DWELLING_Test_detail_summary.pdf](#)
[32_Hendricks_2006_IMPROVE_Test_detail_a.csv](#)

- Click on the report** of interest.
- The File Download dialog will appear.

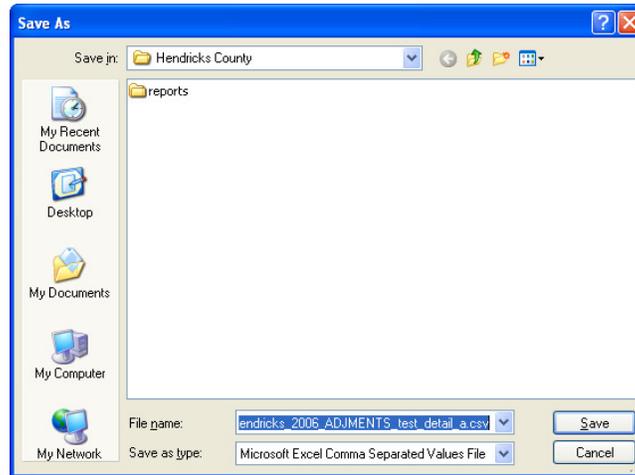
File Download

Do you want to open or save this file?

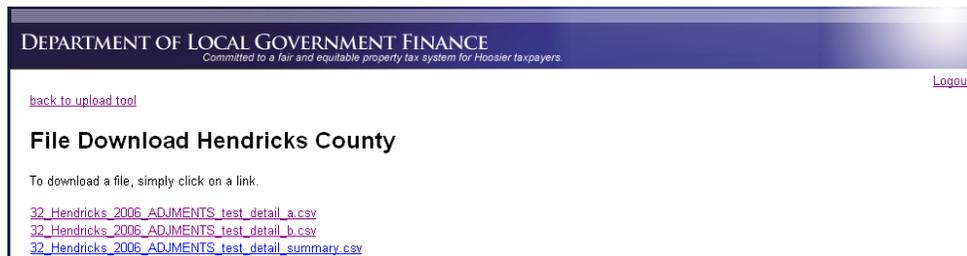
 Name: 32_Hendricks_2006_ADJMENTS_test_detail_a.csv
Type: Microsoft Excel Comma Separated Values File, 33,9...
From: www.stats.indiana.edu

 While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

12. **Click** the **Open** button to view the report on screen. Or **click** the **Save** button to store the file to your local workspace.
13. The Save As dialog appears.
14. Use the Save As dialog **Save in:** drop-list to navigate to where you would like to store the file.



15. If desired, **change** the **name** of the file in the **File name:** drop-list. You may want to add a date to the file name if you need to retain all copies of the testing reports as you proceed.
16. **Click** the **Save** button to save the file.
17. The list of reports available for your County will appear.



18. Repeat steps 10 through 16 until all of the desired reports are viewed and/or saved.
19. When you have completed viewing/saving your files **EITHER click** the **Back to Upload Tool** link, located in the upper left hand corner of the screen to go back to the Property Data Upload Screen; **OR click** the **Logout** link, located in the upper right hand corner of the screen, to quit the application.

IMPORTANT NOTES:

1. Reports generated for Test files will be overwritten when a file with the same name is uploaded as a test file.
 2. Reports generated for Official Submission will be retained.
-

Obtaining a Login and Password

A login and password can only be supplied by DLGF. If you are a County Assessor or County Auditor and need to acquire a login and password you are asked to email data@dlgf.in.gov to request one. A valid email must be provided to DLGF and confirmed prior to issuance of a login and password.

1. **Open** your internet browser.
2. On the web, go to www.in.gov/dlgf/local/PropertyDataUploadApp.html.
3. The first DLGF Property Data Upload web page will open in your browser.
4. Click the Go to Upload Application link.
5. The Authorized Login page will open in your browser.



The screenshot shows the login page for the Property Data Upload Application. At the top, there is a blue header with the text "DEPARTMENT OF LOCAL GOVERNMENT FINANCE" and a tagline "Committed to a fair and equitable property tax system for Hoosier taxpayers." Below the header, the title "Property Data Upload Application" is displayed in a large, bold font. Underneath, it says "For Authorized Indiana County Personnel" in red, followed by a note: "For access information or questions, contact the Department of Local Government Finance". The login form includes a "User Name:" field, a "Password:" field, a checkbox for "Remember me next time.", and a "Log In" button. A link for "Forgot or Reset your password?" is located below the password field. At the bottom of the page, contact information for the Indiana Department of Local Government Finance is provided, including the address "100 North Senate Ave., Room NT1056, Indianapolis, IN 46204" and the email "data@dlgf.in.gov". A logo for "STATS Indiana" is also present.

6. **Click the Forgot or Reset your Password?** link.

Property Data Upload Application

For Authorized Indiana County Personnel

For access information or questions, contact the [Department of Local Government Finance](#)

Forgot Your Password?
Enter your User Name to receive your password.
User Name:

Indiana Department of Local Government Finance
100 North Senate Ave., Room N1058
Indianapolis, IN 46204
dlgf@dlgf.in.gov



7. Enter your **User Name** assigned by DLGF.
8. **Click Submit.** This will cause an email to be sent to the email of record for this user. To retrieve the password you must check your email.

Property Data Upload Application

For Authorized Indiana County Personnel

For access information or questions, contact the [Department of Local Government Finance](#)

Your password has been sent to you. click [here](#) to login

Indiana Department of Local Government Finance
100 North Senate Ave., Room N1058
Indianapolis, IN 46204
dlgf@dlgf.in.gov

9. Once you have your password, **click here** on the screen to login to the application as usual.