



Department of Local Government Finance

2021 Sales Data Submission & Compliance Review Processes

Data Analysis Division
November 2021



Agenda

- This webinar will help you with better understanding the following:
 - What items to consider as you complete your review of your county's 2021 sales data in preparation for submission via Gateway.
 - How to upload and affirm your 2021 sales data in the Gateway Sales Application site.
 - What sort of items or checks the Department looks at as part of its compliance review process of the sales data.



Sales Data Submission Deadline

- Per IC 6-1.1-5.5-3, on or before February 1, county assessors are to submit all sales disclosure records that have a conveyance date during the preceding year.
- In other words, county assessors must submit all sales disclosure records that occurred in 2021 by no later than February 1, 2022.
- Per 50 IAC 26-20-4(k) requires that sales data be uploaded on a weekly basis to the Gateway Sales Application site, but we are currently in the process of updating the rule to change the frequency from weekly to monthly.



Steps to Take Before Data Submission

- While reviewing sales disclosure records that have been entered in your sales disclosure software system, please ensure that all records have at a minimum:
 - At least one buyer and one seller listed.
 - Valid dates for all date fields on the form (e.g., sales, conveyance, transfer, and form received.)
 - Valid sales price.
 - Valid parcel number(s) and state assigned taxing district(s).
 - Valid property class code(s).



Steps to Take Before Data Submission

- Assuming that the SDF is indeed a completed form, verify that Question No. 11 under the Assessor's Section of the SDF – “Is form complete?” – is checked “Yes.”
- This question must be checked “Yes” in order for the record to be included as part of the Department's sales data compliance review process.



Steps to Take Before Data Submission

- State Sales Disclosure Fee Revenue Reconciliation
 - A joint process that involves the partnership between the county assessor's office and the county auditor's office.
 - If Question No. 12 under the Assessor's Section of the SDF – "State sales disclosure fee required?" – is checked "Yes," the county auditor's office will need to verify if the fee has been collected on that particular sales transaction.
 - Discrepancies between Question No. 12 and Question No. 7 under the Auditor's section – "Is state sales disclosure fee collected?" may potentially result in the county falling outside the tolerance of the Department's revenue compliance check.



Steps to Take Before Data Submission

- State Sales Disclosure Fee Revenue Reconciliation
 - Certain sales disclosure transactions are eligible to be assessed the State sales disclosure fee – half of which is retained by the county and the other half is remitted to the State as part of the settlement process.
 - For county auditors, verify that you have completed the Fall 2021 Settlement process with the Auditor of State's office and have remitted to the State any additional State sales disclosure fee revenue collected since the Spring 2021 settlement.



SDF Data Submission Process

- In order to help the Department with its review of the county's submitted sales disclosure fee revenues, the county auditor's office should email a copy of its sales disclosure fee fund report to the Department's Data Inbox at data@dlgf.in.gov.
- The fund report should provide a transaction log of State sales disclosure fees collected during the previous calendar year, including the amounts remitted to the State during the Spring 2021 and Fall 2021 settlement periods.



SDF Data Submission Process

- Once the county assessor's office has completed its review of its sales disclosure records and has completed the reconciliation process of the sales disclosure fee revenue with the county auditor's office, the county assessor's office should be ready to submit its sales data to the State.
- Starting with 2021 sales data, all counties now use the Gateway Sales Application site to upload their sales data to the Department.



SDF Data Submission Process

- Please ensure that your sales data includes records for the complete 2021 calendar year (i.e., 1/1/2021 – 12/31/2021).
- If you have done incremental (e.g., monthly or quarterly) uploads of your sales data throughout the year, you do not necessarily need to do another upload of *all* your 2021 sales by the February 1 deadline; however, you can certainly do so in the event you need to update information for any sales that have been edited/updated since they were last uploaded.
- You do *not* need to submit or email the sales data separately to the Legislative Services Agency (“LSA”).



Gateway Sales Application (Used for 2021 sales onward)

INDIANA Gateway

for government units



Department of Local Government Finance - Sales Application

If you want to access Sales data prior to 1/1/2021, please [click here.](#)

Authorized Personnel Login

User Name:

Password:

Log In



Gateway Sales Application

- The Gateway Sales Application site has the same URL that was used for the Gateway SDF site: <https://gatewaysdf.ifionline.org>
- The username and password that you use to log into Gateway to submit your PTABOA annual report is the same information you will use for the new site.
- New account and password reset requests should be sent to the Department's Support address at support@dlgf.in.gov.



Gateway Sales Application – Home Page

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Department of Local Government Finance - Sales Application

[Home](#) [Logout](#)

If you want to access Sales data prior to 1/1/2021, please [click here.](#)

Select Sales Year: 2021

Select County from below List

Show 10 entries Search:

County Id	County Name	User Role
01	Adams	Submitter



Gateway Sales Application – Home Page

- The homepage on the new Sales site is more streamlined compared to the Gateway SDF site.
- You will select the applicable Sales Year for which you need to upload your data files.
- Then, you will click on your county name to continue to the File Upload screen.



Gateway Sales Application – File Upload

INDIANA Gateway for government units



Department of Local Government Finance - Sales ApplicationHome Logout

If you want to access Sales data prior to 1/1/2021, please [click here](#).

[Home](#) > [File](#)Allen County - 2021 Sales Year

Please upload only zip files here

Choose File

No file chosen

Upload

Affirmation

Show

10

 entries

Submission Id	FileName	Upload Status	Timestamp	Uploaded By	Download	Action
No data available in table						

Showing 0 to 0 of 0 entries

Previous

Next



Gateway Sales Application – File Upload

- The File Upload page on the new Sales site only accepts data files that are zipped.
- The zip file must include all five sales disclosure data files – even if there might not be any records in the two addendum files: SALEDISC, SALECONTAC, SALEPARCEL, SDISCADDCI, and SDISCADDAR
- The processing capacity on the new Sales site is significantly improved compared to Gateway SDF, allowing for quicker uploads and the ability to process larger size datasets.



Gateway Sales Application – Successful File Upload

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Department of Local Government Finance - Sales Application

[Home](#) [Logout](#)

If you want to access Sales data prior to 1/1/2021, please [click here](#).

[Home](#) > [File](#)

Allen County - 2021 Sales Year

Please upload only zip files here

Choose File

No file chosen

Upload

Affirmation

Show

10

 entries

Submission Id	FileName	Upload Status	Timestamp	Uploaded By	Download	Action
39	Sales Files Version 1.zip	<div>Valid</div>	03/02/2021 11:41:33 AM	jjohnson@dlgf.in.gov	Sales Files Version 1.zip	Details

Showing 1 to 1 of 1 entries

Previous

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Next



Gateway Sales Application – Successful File Upload

- To determine if your file upload processed successfully, look for a green “Valid” status under the Upload Status column.
- Additionally, you will be able to export the dataset that was successfully processed by clicking on the file name link under the Download column.



Gateway Sales Application – Unsuccessful Upload

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[Home](#) [Logout](#)

If you want to access Sales data prior to 1/1/2021, please [click here](#).

[Home](#) > [File](#)

Floyd County - 2021 Sales Year

Please upload only zip files here

Choose File

No file chosen

Upload

Affirmation

Show

10

 entries

Submission Id	FileName	Upload Status	Timestamp	Uploaded By	Download	Action
49	Sales Files with Errors.zip	<div>Invalid</div>	03/03/2021 4:18:15 PM	jjohnson@dlgf.in.gov	N/A	Details

Showing 1 to 1 of 1 entries

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Gateway Sales Application – Unsuccessful Upload

- If your file upload did not process successfully, you will notice a red “Invalid” status under the Upload Status column.
- Additionally, you will not be able to export the dataset that the database attempted to process; rather, there will be a “N/A” listed under the Download column.
- Click on the “Details” link under the Action column for further information on which files generated errors upon processing.



Gateway Sales Application – File Details

Gateway

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Department of Local Government Finance - Sales Application

[Home](#) [Logout](#)

If you want to access Sales data prior to 1/1/2021, please [click here](#).

[Home](#) > [File](#) > Detail

Id	FileName	Status	Download	Action
415	SDISCADDCL.txt	Failed	N/A	View Error
414	SDISCADDAR.txt	Failed	N/A	View Error
413	SALEPARCEL.txt	Failed	N/A	View Error
412	SALEDISC.txt	Failed	N/A	View Error
411	SALECONTAC.txt	Failed	N/A	View Error



Gateway Sales Application – File Details

- Each file that generated errors upon processing will be listed with a red “Failed” status under the Status column.
- Please note that in order for the entire dataset to process successfully, all five files must have a green “Valid” status. Even if only one of the five files contain errors, that one file will prevent the entire dataset from being processed.
- Click on the View Error link under the Action column to see the list of errors generated for each file.



Gateway Sales Application – View Errors

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Department of Local Government Finance - Sales Application

[Home](#) [Logout](#)

If you want to access Sales data prior to 1/1/2021, please [click here](#).

[Home](#) > [File](#) > [Detail](#) > Error

Error Description
C??-2021-0009890 Invalid SDF ID
C??-2021-0009891 Invalid SDF ID
C??-2021-0009892 Invalid SDF ID
C??-2021-0009893 Invalid SDF ID
C??-2021-0009895 Invalid SDF ID

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Gateway Sales Application – View Errors

- Each SDF record that generated an error will be listed on the View Error screen, along with the description of the error.
- It's possible that certain SDF IDs may be listed more than once if those records contained multiple errors.
- Please note that you may need to click on the “Next” button at the bottom right-hand corner to see the complete list of errors for the entire file.
- Please capture a screenshot of the errors shown for each file and share this info with your sales disclosure software vendor.



Gateway Sales Application - Affirmation

- Upon completion of your review and validation process and successful upload of all sales for a particular month, you will affirm that you have uploaded the complete reviewed/validated dataset for that month.
- Affirming a particular month's sales is a quick, simple three-step process.
- This new Affirmation feature takes the place of having to email the Department's Data Inbox to verify that you have submitted all your sales for a particular conveyance date range.
- **All twelve months' sales must be affirmed before the Data Analysis Division will conduct its compliance review process of your 2021 sales data.**



Gateway Sales Application - Affirmation

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Department of Local Government Finance - Sales Application

[Home](#) [DLGF Search Site](#) [Logout](#)

If you want to access Sales data prior to 1/1/2021, please [click here](#).

[Home](#) > [File](#) > Affirmation

Adams County - 2021 Sales Year

Affirmation

Month	Modified By	Timestamp	Affirmation	Action
January			<input type="checkbox"/>	Edit
February			<input type="checkbox"/>	Edit
March			<input type="checkbox"/>	Edit
April			<input type="checkbox"/>	Edit
May			<input type="checkbox"/>	Edit
June			<input type="checkbox"/>	Edit
July			<input type="checkbox"/>	Edit
August			<input type="checkbox"/>	Edit
September			<input type="checkbox"/>	Edit



Step 1: Click on the Edit button for the applicable month.



Gateway Sales Application - Affirmation

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Department of Local Government Finance - Sales Application

[Home](#) [DLGF Search Site](#) [Logout](#)

If you want to access Sales data prior to 1/1/2021, please [click here](#).

[Home](#) > [File](#) > Affirmation

Adams County - 2021 Sales Year

Affirmation

Month	Modified By	Timestamp	Affirmation	Action
January			<input checked="" type="checkbox"/>	<div>SaveCancel</div>
February			<input type="checkbox"/>	<div>Edit</div>
March			<input type="checkbox"/>	<div>Edit</div>
April			<input type="checkbox"/>	<div>Edit</div>
May			<input type="checkbox"/>	<div>Edit</div>
June			<input type="checkbox"/>	<div>Edit</div>
July			<input type="checkbox"/>	<div>Edit</div>
August			<input type="checkbox"/>	<div>Edit</div>
September			<input type="checkbox"/>	<div>Edit</div>

Step 2: Check the box under the Affirmation column.

Step 3: Click on the Save button.



Gateway Sales Application - Affirmation



If you want to access Sales data prior to 1/1/2021, please [click here](#).

[Home](#) > [File](#) > Affirmation

Adams County - 2021 Sales Year

Affirmation

Month	Modified By	Timestamp	Affirmation	Action
January	jjohnson@dlgf.in.gov	10/7/2021 4:06:25 PM	<input checked="" type="checkbox"/>	Edit
February			<input type="checkbox"/>	Edit
March			<input type="checkbox"/>	Edit
April			<input type="checkbox"/>	Edit
May			<input type="checkbox"/>	Edit
June			<input type="checkbox"/>	Edit
July			<input type="checkbox"/>	Edit
August			<input type="checkbox"/>	Edit
September			<input type="checkbox"/>	Edit

A date and timestamp will appear in the row for the applicable month that you have affirmed.





Sales Data Compliance Review Process



SDF Compliance Review Process

- The Data Analysis Division's review of sales data is centered around two primary questions:
 - Have all the sales for the specified conveyance period been submitted?
 - Does the SDF data submitted appear to be complete and accurate?
 - Examples: Are buyer/sellers listed? Is the sales price listed? Are the taxing district and parcel number included?



SDF Compliance Review Process

- It's helpful to consider the Data Analysis Division's review of the sale data as the “primer” in the ratio study approval process.
- The Data Analysis Division's review helps to ensure the underlying foundation of the sales data used in a ratio study.
- The Data Analysis Division's review does not answer the following questions:
 - Should a certain sale be marked valid for trending?
 - Should a certain sale be included in a ratio study?



SDF Compliance Review Process

- When the Data Analysis Division completes its review of a county's sales data, it emails the county two documents with its finding:
 - The Sales Issues Workbook provides an itemized breakdown of the records that contained probable/possible errors based on our compliance checks.
 - The Sales Disclosure Compliance Report provides a summary analysis of the various checks performed on the submitted data, along with an official compliance status.



SDF Compliance Review Process

- The Sales Issues Workbook contains *up to* six separate tabs, which provide a list of sales records that generated errors – either certain or possible - when the data was run through the various compliance checks.
- The six tabs are as follows:
 - Missing Critical Data.
 - Single-Parcel Sale Duplicates.
 - Multi-Parcel Sale Duplicates.
 - Valuable Consideration.
 - Part 2 – County Assessor Checks.
 - Part 3 – County Auditor Checks.



SDF Compliance Review Process

- The Missing Critical Data tab contains data that may be missing or mismatched between the Sales files and the Parcel file. Checks are performed on both single and multi-parcel sales but are separated out on the spreadsheet.
- The Single-Parcel Sale Duplicates tab contains sales that are possible duplicates. Generally, these sales will contain different SDF ID numbers but have the same parcel number, conveyance date, sales price, along with buyer, preparer, and seller listed.



SDF Compliance Review Process

- The Multi-Parcel Sale Duplicates tab contains possible duplicate records just like the Duplicate Parcels tab; however, this tab pertains only to multi-parcel sales contained in the dataset.
- The Valuable Consideration tab contains a list of parcels (sales) that have a sales price greater than zero (0) but are marked as “NO” for valuable consideration.



SDF Compliance Review Process

- The Part 2 – County Assessor Checks tab contains records where there are possible discrepancies between items marked in Part 1 of the SDF compared to the information listed in Part 2 of the SDF, like an individual SDF that contains multiple parcels located in different taxing districts.
- The Part 3 – County Auditor Checks tab contains records where there are possible discrepancies between those records marked as requiring a State sales disclosure fee and the amount of fee collected.



SDF Compliance Review Process

Page 1

2021 Sales Disclosure File (SDF) Data Review		
Sales Review Period: 1/1/2021 to 12/31/2021		
1	County Name (Number):	Date of Report:
2	Date SALES Files Received:	
3	2021 Sales Status: COMPLIANT	
4	Corrections Required for Future Submissions: Provide missing "critical" data, as noted on the Missing Critical Data tab of the Issues Workbook, for all records; Correct Duplicate Records; Verify all Y/N fields for conditions of sale are populated correctly, particularly sales flagged as having no valuable consideration but contain a sales price greater than \$0	
5	Comments: See file attachment Morrison_2021_Sales_Issues.xls for additional details.	
Checks to ensure all records have been submitted		
Revenue Check		
6	Total # of SDF records marked as requiring the State sales disclosure fee (Item 12 in Part 2 of SDF)	8988
7	Total # of SDF records marked as the State sales disclosure fee being collected (Item 7 in Part 3 of SDF)	8800
8	County's collection rate percentage of State sales disclosure fee (Value in Line 7/Value in Line 6)	97.9%
9	Total amount of State sales disclosure fee collected based on all submitted sales with a conveyance date in 2021 (Item 1 in Part 3 of SDF)	45250
10	Sales disclosure fee revenue reported by the Auditor of State (AOS) for June and December settlements in 2021 (combined)	44700
11	Percentage of State sales disclosure fee revenue reported by AOS compared to what was collected based on all submitted sales (Value in Line 10/Value in Line 9)	98.8%
Number of Sales Disclosures Reported		
12	Number of sales disclosures with a conveyance date in 2020 submitted by the county	10000
13	County 3-year average of sales disclosures submitted by the county (2018-2020)	9925
14	County 5-year average of sales disclosures submitted by the county (2016-2020)	9850
15	Percentage increase/decrease in 2021 sales disclosures compared to 2020 sales disclosures	3.3%
16	Percentage increase/decrease in 2021 sales disclosures compared to county 3-year average	4.1%
17	Percentage increase/decrease in 2021 sales disclosures compared to county 5-year average	4.9%
Checks to Ensure the Data Are Complete and Correct		
Missing Critical Data & Other Probable Data Errors		
18	Overall total # of SDF records in SALES files	10328
Please refer to the attached Issues Workbook for further detail on the summary of checks shown immediately below:		
19	Single-parcel sales missing critical data	59
20	Multi-parcel sales missing critical data	2
21	Percentage of overall total # of records missing critical data	0.6%
22	Number of possible single-parcel sale duplicates	50
23	Number of unique sales from the single-parcel sale duplicates	25
24	Percentage of overall total # of records that are possible single-parcel sale duplicates	0.2%
25	Number of possible multiple-parcel sale duplicates	30
26	Number of unique sales from the multiple-parcel sale duplicates	15
27	Percentage of overall total # of records that are possible multi-parcel sale duplicates	0.1%
28	Number of sales marked as "Yes" for Valuable Consideration but list a sales price of \$0	2
29	Percentage of overall total # of records marked as "Yes" for Valuable Consideration but list a sales price of \$0	0.0%
30	Number of sales marked as "Yes" for Involving Land but have \$0 in AV of Land field (Part 2 Item 2)	2
31	Number of sales marked as "Yes" for Involving Improvement but have \$0 in AV of Improvement field (Part 2 Item 3)	5

Page 2

32	Number of sales marked as having personal property with a value greater than \$0 in Section E and/or Section G but have \$0 in Value of Depreciable Personal Property field (Part 2 Item 4)	45
33	Number of sales where the Individual AVs in Part 2 do not equal the value in AV Total field (Part 2 Item 5)	0
34	Number of multi-parcel sales that include multiple parcels on one SDF but that have parcels in different state assigned taxing districts	140
35	Number of sales that have one or more conditions checked "Yes" in Item 8 - 10 in Section B and are checked as State Sales Disclosure Fee required (Part 2 Item 12)	13
36	Percentage of overall total # of records that contain an error in the Part 2 - County Assessor section	2.0%
37	Number of sales that are checked as State sales disclosure fee collected (Part 3 Item 7) but show \$0 under the amount collected (Part 3 Item 1)	3
38	Number of sales that show an amount greater than \$0 collected for the State sales disclosure fee (Part 3 Item 1) but are checked "No" as State sales disclosure fee collected (Part 3 Item 7)	0
39	Number of sales where the Individual fee collected amounts in Part 3 do not equal the value in Total fee collected field (Part 3 Item 3)	0
40	Percentage of overall total # of records that contain an error in the Part 3 - County Auditor section	0.0%
Pay 2022 PARCEL File Match		
41	Pay 2022 PARCEL data status	Pending
42	Percentage of 2021 sales match to Pay 2022 PARCEL data	99.2%
43	Number of splits reported in SALES files	103
44	Comments:	
Valid for Trending		
45	Total SDF records reported that are marked valid for trending	7829
46	Valid for trending as a % of total SDF records reported	75.8%
47	Valid for trending as a % of total SDF records marked for valuable consideration and require a State sales disclosure fee	87.1%
48	County 3-year average of sales marked valid for trending as % of total SDF records reported (2018-2020)	74.20%
49	County 3-year average of sales marked valid for trending as % of total SDF records marked for valuable consideration and require a State sales disclosure fee (2018-2020)	86.50%
50	County 5-year average of sales marked valid for trending as % of total SDF records reported (2016-2020)	73.10%
51	County 5-year average of sales marked valid for trending as % of total SDF records marked for valuable consideration and require a State sales disclosure fee (2016-2020)	86.40%
52	Comments:	



SDF Compliance Review Process

2021 Sales Disclosure File (SDF) Data Review		
Sales Review Period: 1/1/2021 to 12/31/2021		
1	County Name (Number):	Date of Report:
	Morrison (95)	2/7/2022
2	Date SALES Files Received:	
	1/28/2022	
3	2021 Sales Status: COMPLIANT	
4	Corrections Required for Future Submissions: Provide missing "critical" data, as noted on the Missing Critical Data tab of the Issues Workbook, for all records; Correct Duplicate Records; Verify all Y/N fields for conditions of sale are populated correctly, particularly sales flagged as having no valuable consideration but contain a sales price greater than \$0	
5	Comments: See file attachment Morrison_2021_Sales_Issues.xls for additional details.	



SDF Compliance Review Process

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SDF Compliance Review Process

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SDF Compliance Review Process

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SDF Compliance Review Process

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SDF Compliance Review Process

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44	Comments:	



SDF Compliance Review Process

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52	Comments:	



SDF Compliance Review Process

- If a county's sales data is deemed "non-compliant" by the Data Analysis Division, the county must review the possible errors, make any necessary corrections, and resubmit its sales data for another round of reviews.
- When a county's sales data is deemed "compliant," this essentially signals a go-ahead for the Assessment Division to proceed with its review - and ultimate approval - of the county's submitted ratio study.



SDF Online Search

- The SDF Online Search database is available to the general public to search on any sales records that counties have uploaded to the Gateway Sales Application site:
<https://gatewaysdf.ifionline.org/Search>.
- Sales records in the 2008 – 2020 time frame that counties uploaded to the previous Gateway SDF database can still be accessed: <https://retiredgatewaysdf.ifionline.org/Search.aspx>.
- For any sales records prior to 2008, individuals seeking that historical data should follow up directly with the applicable county to inquire if they may still have access to that information.



Questions?



Thank you!

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