



# **New Assessor Training Data Compliance**

**Barry Wood**

**Assessment Division Director**

**January 2019**



# New Assessor Training

---

- **2019 Data Submission Dates and Compliance Review Summary**
  - Dates may change by action of the 2019 General Assembly.
- **February 1**: Deadline for submission of assessors' sales disclosure data (SALEDISC, SALECONTAC, SALEPARCEL) for calendar year 2018 (January 1 – December 31, 2018) sales (affects 2019-pay-2020 tax year).
  - DLGF Data Compliance Review Time Frame: February/March.



# New Assessor Training

---

- **DLGF Data Compliance Review Covers:**
  - A verification that all sales have been submitted for the previous calendar year and that all the sales data has complete and correct information. A county that exceeds 2% in “missing critical” information from its dataset will be deemed non-compliant and will have to correct and resubmit.



# New Assessor Training

---

- **March 1**: Deadline for submission of assessors' annually assessed mobile home file (MOBILE, APPEALMH) for calendar year 2019 (affects 2019-pay-2019 tax year).
  - DLGF Data Compliance Review Time Frame: Typically June/July.



# New Assessor Training

---

- **DLGF Data Compliance Review Covers:**
  - Data errors that are exclusive to the MOBILE file itself (Incorrect format for property record number, missing owner/address info, missing VIN) and data errors that are mismatched between records in the MOBILE file and the county's property tax data file for the same pay year.



# New Assessor Training

---

- **August 30**: Deadline for submission of assessors' real property data (PARCEL, LAND, IMPROVE, DWELLING, BUILDING, BLDDTL, APPEAL) for the 2019-pay-2020 tax year.
- DLGF Data Compliance Review Time Frame: Primary review done in October – December of the same year the data is received; a secondary review comparing the real property values to the same records in the county's property tax data file for the same pay year is done during the following March – May time frame.



# New Assessor Training

---

- **DLGF Data Compliance Review Covers:**
  - Parcel Number Format
  - Duplicate Parcel Numbers
  - State Assigned Taxing District Check
  - Valid Property Class Codes
  - PARCEL File AV Allocation Additions
  - Negative and Non-Numeric Assessed Values



# New Assessor Training

---

- LAND file and PARCEL file matching records.
- IMPROVE file and PARCEL file matching records.
- Missing owner and property address information.
- PARCEL file and property tax data file for the same pay year matching records.



# New Assessor Training

---

- **August 30**: Deadline for submission of assessors' personal property data (PERSPROP, POOLDATA, APPEALPP) for the 2019-pay-2020 tax year.
  - DLGF Data Compliance Review Time Frame: Primary review done in October – December of the same year the data is received; a secondary review comparing the personal property values to the same records in the county's property tax data for the same pay year is done during the following March – May time frame.



# New Assessor Training

---

- **DLGF Data Compliance Review Covers:**
  - Property record number format.
  - Duplicate property record numbers.
  - pooldata file format.
  - Valid NAICS codes.
  - Negative and non-numeric assessed values.
  - PERSPROP and POOLDATA matching records.
  - Gross AV greater than acquisition cost.
  - PERSPROP file and property tax data file for the same pay year matching records.



# New Assessor Training

---

- **August 30**: Deadline for submission of assessors' oil & gas assessment data for those counties where applicable (OILGAS, OILGASALL) for the 2019-pay-2020 tax year.



**Questions ?????**



# Contact the Department

---

- Barry Wood
  - Telephone: 317-232-3762
  - Fax: 317-974-1629
  - E-mail: [bwood@dlgf.in.gov](mailto:bwood@dlgf.in.gov)
- Website: [www.in.gov/dlgf](http://www.in.gov/dlgf)
  - “Contact Us”: [www.in.gov/dlgf/2338.htm](http://www.in.gov/dlgf/2338.htm)