

Dunn County

Real Property Lister



ACS Assessor Binders

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Electronic copy available in LIS shared folder

Table of Contents

1. [Introduction](#)
2. [Usage of the Manual](#)
 - a. How to use this manual
 - b. Flowchart basics
 - c. Overview of the assessment year as per the RPL handbook
 - d. Assessment Cycle Tracker Flowchart
 - e. Phase Flowchart
 - f. Process Activity Tasklists usage
 - g. Tasks usage
3. [Assessor Cycle Flowchart with ACS Imports Marked as active](#)
4. [ACS Imports Phase Task Breakdown Flowchart](#)
5. [Individual tasks](#)
6. [PATs](#)

1. Introduction

This manual is to be used to complete the ACS Generate Clerks Binders Phase of the Assessment Cycle. By using the tools provided in this manual you will be able to successfully import all electronic data for Real Property into the ACS AO system.

2. Usage of the Manual

a. How to use this manual

This manual is broken down into sections that will detail how to use it, locating your current assessor phase, the phase flowchart and its associated tasks and decisions. If you are unfamiliar with how to use the manual be sure to thoroughly read section 2 to gain a better understanding of the functionality of the this document.







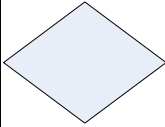

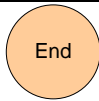
To use this manual you will need to perform the following steps

1. Determine what phase you are going to complete. For this manual it should be the ACS Import phase. The Assessment Cycle Tracker spreadsheet and your knowledge of the Assessment process from the RPL hand book will guide you to the correct time a phase should be completed
2. Find the correct phase flowchart and follow it performing tasks and answering questions as needed. If you are unsure of how to use a flowchart please refer to section 2b for a primer on usage of flowcharts
3. as directed by tasks update the Assessment Cycle tracker
4. mark the phase as completed on the Assessment Cycle Tracker once all tasks and questions have been answered

b. Flowchart basics

To use a flowchart find the green circle that is labeled “Start”. Follow the arrow to the first item on the list. The items shape will help you determine what to do next. The following is a chart of the shapes on the flowchart and what you must move to the next item on the chart. To move to the next item follow the appropriate line in the direction of the arrow.

Table 1 – Flowchart shapes

Shape	Action Type	How to use
	Start	The point at which you will start performing the actions on the spread sheet. Follow the arrow to the shape to begin the phase
  	Arrow	This shape shows you the direction to go to get to the next shape on the flowchart. Some arrows are attached to question shapes. These arrows will have an answer to the question you have answered. Select the correct arrow and follow it to the next shape from the question you just answered
	Resume	If you need to stop a phase and resume it at a late time this is the point at which you will begin once you are ready
	Decision	follow the arrow if you agree with the decision otherwise stop and ensure the item is completed before beginning this phase
	Question	answer the question and follow the arrow marked yes if you answered yes and no if you answered no to the next shape on the flowchart
	Task	Perform the task to completion before following the arrow to the next shape
	Termination	This is the final shape on a spreadsheet. Once you reach this shape the phase is completed.

c. Overview of the assessment year as per the RPL handbook

This information is taken from the 2010 WRPL handbook in the Calendar of Events section (section 4)

January – February

- Process remaining documents recorded through December 31 of previous year.
- Enter any new and/or revised data into the computer system and edit. When completed, process the following for the assessor: name change and split labels, split assessment roll or split deeds, real and personal property work assessment rolls and an alphabetic listing of property owners. In addition, provide the assessor with a copy of the State Prescribed “Assessment Roll Instructions for Assessors.”
- Copy any new or revised property maps and distribute to the assessor.
- Run updated work rolls for the office. The office copy could be a duplicate of the work roll run for the assessor or a digital file.
- Send digital extractions of the beginning work rolls to the Department of Revenue.

March

- Prepare letter for the local clerks on the status of forms to be used at boards of review.
- Inventory forms for board of review and order any that are low in stock or outdated.
- Copy the State Prescribed "Assessment and Tax Roll Instructions for Clerks."

April

- Work rolls should be returned by the assessors; enter changed data into computer system and edit. Remember to check Private Forest Crop, Managed Forest Land and County Forest Crop codes against state printout. Also check the manufacturing assessment roll provided by the state against the work assessment roll. Are the parcels coded correctly?
- Be sure to enter into the computer any name changes made in office work rolls before printing the final assessment roll and Notice of Assessments
- Print Real and Personal Property Final Assessment Roll along with the Summary of Assessment Report which includes Special District totals and the Notice of Assessments.
- Print the TID report and totals.
- Place assessment roll pages in covers with indexes, State Prescribed front and back forms and "Assessment and Tax Roll Instructions for Clerks."
- Mail letter to local clerks relative to Board of Review proceedings

May/June

- Board of Review changes are received from local clerk. Enter and edit changed data and produce new Summary of Assessment Totals and TID report. Verify these totals against the assessor's final totals to make sure all changes were received. Mail new totals to local clerk for state required reports.
- Submit the Statement of Assessment to the Department of Revenue if your county has an arrangement with the clerks/municipalities that the RPL handles this function.
- Send digital extractions of the final assessment rolls to the Department of Revenue as they are completed.

July

- Letter from Department of Revenue regarding State Prescribed assessment/taxation forms should arrive this month. Do inventory on existing supply and organize quotes to vendors for forms needed.

August

- Mail quotes to vendors on assessment/tax forms this month.

September

- Three-day Annual State Meeting of WRPLA starts the third Wednesday of this month. Tuesday is an optional hands-on education session!
- Camera-ready copies of State Prescribed front and back forms for assessment and tax rolls should be received.

October

- Aggregate ratios arrive from Department of Revenue.
- State-assessed manufacturing (SAM) roll arrives with equated values. Enter values into computer system and edit. Process new summary of assessment totals of real and personal property and mail to local clerk to verify. These totals are needed to figure the mill rates.
- Order assessor's State Prescribed assessment forms.

November

- Special assessments and special charges are received from local clerks. Enter into computer system and edit. Prepare a special assessment listing for local clerk to verify.
- Start to copy new and updated property maps for assessor. Distribute at assessor's meeting usually scheduled by Department of Revenue this month or with work roll.
- Estimated Major State Aids arrive from Department of Revenue.

December

- Mill rates received from local clerk. Enter and edit. Process an extension of values and send to local clerk to verify rates. When approved by local clerk, process the real and personal property tax rolls and tax bills.
- Send a digital file of the final tax values to the Department of Revenue.
- Run updated work rolls for the office. The office copy could be a duplicate of the work roll run for the assessor.

d. Assessment Cycle Tracker Flowchart

The Assessment Cycle Tracker is used to track the current assessment year's progress. A new Assessment Cycle Tracker will be created at the start of each new roll year. Previous year trackers will be closed and retained for record keeping purposes.

The Tracker is broken down into 2 major categories: the dashboard and the phase tracker worksheets. The dashboard is an automatically updated workbook that shows you the status of the year's phases. No data entry is performed in this workbook. Use it to help determine what phase for each municipality needs to be done and whether or not you have successfully completed an entire phase (by completing all municipalities or tasks in a phase). Please refer to figure 1 for a visual reference of what data is contained on the dashboard workbook. Each phase for each municipality will have a status. This status will be a verbal description of what is happening in the phases (i.e. Not Started, Notice Received, Completed, etc...) and a color. The following is a list of the colors that will be found

Table 2 – Assessment Cycle Tracker Color Chart

Color	Status type
	Not Started. No action has been performed for this phase for the associated municipality
	Finished or completed. All tasks and actions have been completed for this phase for the associated municipality
	Ready to Start. The phase is ready to be started for the associated municipality
	Action Required. An issue has been encountered during the phase and must be resolved before continuing the phase for this associated municipality
	Waiting for 3 rd party. The phase will be completed once a 3 rd party is able to receive the data from the phase for the associated municipality

Figure 1 – Assessment Cycle Tracker: Dashboard

Assessment Year					Phases					
Assessment Cycle 2011					Set G3 Values to Zero	Import to ACS from MarketDrive	Receive manual Assessor binder corrections	Manual Entry of Real Estate for Roll Year	Manual Entry of Personal Property for Roll Year	Generate Assessment
Muni Code	Muni Type	Muni Name								
002	Town	Colfax			Finished	Not Started	Not Started	Not Started	Not Started	Not Started
004	Town	Dunn			Finished	Correction Request Sent	Electronic Import	Electronic Import	Electronic Import	Not Started
006	Town	Eau Galle			Finished	Not Started	Not Started	Not Started	Not Started	Not Started
008	Town	Elk Mound			Finished	Not Started	Not Started	Not Started	Not Started	Not Started
010	Town	Grant			Finished	Completed	Electronic Import	Electronic Import	Electronic Import	Ready for
012	Town	Hay River			Finished	Correction Request Sent	Electronic Import	Electronic Import	Electronic Import	Not Started
014	Town	Lucas			Finished	Not Started	Not Started	Not Started	Not Started	Not Started
016	Town	Menomonie			Finished	Not Started	Not Started	Not Started	Not Started	Not Started
018	Town	New Haven			Finished	Notice Received	Electronic Import	Electronic Import	Electronic Import	Not Started
020	Town	Otter Creek			Finished	Not Started	Not Started	Not Started	Not Started	Not Started
022	Town	Peru			Finished	Not Started	Not Started	Not Started	Not Started	Not Started
024	Town	Red Cedar			Finished	Not Started	Not Started	Not Started	Not Started	Not Started
036	Town	Stanton			Finished	Correction Request Sent	Electronic Import	Electronic Import	Electronic Import	Not Started
038	Town	Tainter			Finished	Not Started	Electronic Import	Not Started	Not Started	Not Started
040	Town	Tiffany			Finished	Not Started	Not Started	Not Started	Not Started	Not Started
042	Town	Weston			Finished	Notice Received	Electronic Import	Electronic Import	Electronic Import	Not Started
044	Town	Wilson			Finished	Not Started	Not Started	Not Started	Not Started	Not Started
106	Village	V. Boyceville			Finished	Not Started	Received	Completed	Completed	Completed
111	Village	V. Colfax			Finished	Not Started	Not Started	Not Started	Not Started	Not Started
116	Village	V. Downing			Finished	Not Started	Not Started	Not Started	Not Started	Not Started
121	Village	V. Elk Mound			Finished	Correction Request Sent	Electronic Import	Electronic Import	Electronic Import	Not Started
141	Village	V. Knapp			Finished	Not Started	Not Started	Not Started	Not Started	Not Started
176	Village	V. Ridgeland			Finished	Not Started	Not Started	Not Started	Not Started	Not Started
191	Village	V. Wheeler			Finished	Not Started	Not Started	Not Started	Not Started	Not Started
251	City	C. Menomonie			Finished	Not Started	Not Started	Not Started	Not Started	Not Started

Once an entire column for a phase is green the phase is considered to be complete. In most cases the phase immediately preceding it for a municipality must be completed before starting it.

The other tabs on the worksheet are used to record the status of a phase based on the work done for each municipality. Drop down lists are provided for you to select the correct status from the associated tasks. To update a status follow the Tasks associated with the Phase. Figure 3 is an example of the Import Status phase workbook

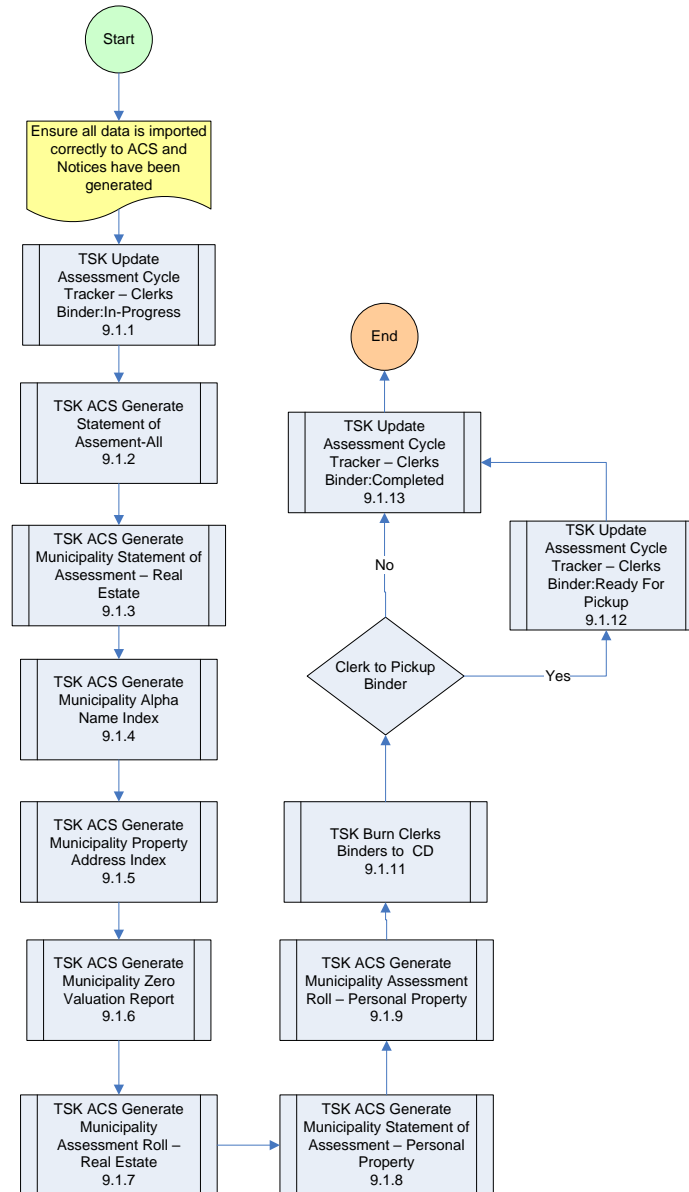
Figure 2 – Import Status Phase Workbook Example

	A	B	C	D	E	F	G
1							
2	Muni Code	Muni Type	Muni Name	Date Notification	Status	Date of correction notification sent	Date of Completion
3	002	Town	Colfax		Not Started		
4	004	Town	Dunn	4/12/2011	Correction Request Sent	5/10/2011	
5	006	Town	Eau Galle		Not Started		
6	008	Town	Elk Mound		Not Started		
7	010	Town	Grant	4/25/2011	Completed	5/9/2011	5/11/2011
8	012	Town	Hay River	4/6/2011	Correction Request Sent	5/4/2011	
9	014	Town	Lucas		Not Started		
10	016	Town	Menomonie		Not Started		
11	018	Town	New Haven	4/28/2011	Notice Received		
12	020	Town	Otter Creek		Not Started		
13	022	Town	Peru		Not Started		
14	024	Town	Red Cedar		Not Started		
15	026	Town	Rock Creek		Not Started		
16	028	Town	Sand Creek	4/12/2011	Completed	5/9 & 17/2011	5/11/2011
17	030	Town	Sherman		Not Started		
18	032	Town	Sherman		Not Started		
19	034	Town	Spring Brook		Not Started		
20	036	Town	Stanton	4/12/2011	Correction Request Sent	5/11, 13 & 17/2011	
21	038	Town	Tainter		Not Started		
22	040	Town	Tiffany		Not Started		
23	042	Town	Weston	5/5/2011	Notice Received		
24	044	Town	Wilson		Not Started		
25	106	Village	V. Boyceville		Not Started		
26	111	Village	V. Colfax		Not Started		
27	116	Village	V. Downing		Not Started		
28	121	Village	V. Elk Mound	4/28/2011	Correction Request Sent	5/13/2011	
29	141	Village	V. Knapp		Not Started		
30	176	Village	V. Ridgeland		Not Started		
31	191	Village	V. Wheeler		Not Started		
32	251	City	C. Menomonie		Not Started		
33	251	City	C. Menomonie		Not Started		
34							
35							

e. Phase Flowchart

The phase flowchart is used to direct you to the next task, question or decision that needs to be completed for a phase. When encountering a Task use the numbers associated with the task to find the correct task in this manual.

Figure 3 – ACS Generate Clerks Binders Phase Flowchart



f. Process Activity Tasklists usage

Process Activity Tasklists (PAT) are a list of other PATs and/or tasks associated with a phase. The Assessment Cycle Phases will always have at least one PAT and may have two PATs if the activity needs to be completed for each municipality in the county. PATs that contain PATs are used ensure all tasks for all municipalities have been completed. PATs that contain Tasks are used to ensure all tasks are completed for a single municipality or phase that only needs the tasks to be complete one time. Figure 4 is a PAT for multiple municipalities and Figure 5 is a PAT of Tasks. Please note that all tasks may not need to be completed to complete a PAT.

Figure 4 – PAT for importing all municipalities

PAT ACS Import All Municipalities Data from MarketDrive

Document Number:		Revision #:	1
Status:	Development	Date Last Updated:	5/9/2011

Production Resource Requirements:

Server(s) Hardware:	
Server OS:	
Storage Requirements:	
Software & Version(s):	ACS Client Current version
Workstation/Laptop Hardware:	
Workstation/Laptop OS:	
Group Policy Object(s):	
Other:	ACS user account lmi_import, access to assessordata.org FTP and access to the PIN association and validation software

Notes:

This PAT is to be completed as municipality data is ready for import.

Activity Information:

List out the project activities here	Start Date	End Date
PAT ACS Import Municipality Data from MarketDrive– Town of Colfax	N/A	N/A
PAT ACS Import Municipality Data from MarketDrive– Town of Dunn	5/9/2011	
PAT ACS Import Municipality Data from MarketDrive– Town of Eau Galle		
PAT ACS Import Municipality Data from MarketDrive– Town of Elk Mound		
PAT ACS Import Municipality Data from MarketDrive– Town of Grant	5/9/2011	
PAT ACS Import Municipality Data from MarketDrive– Town of Hay River	5/9/2011	
PAT ACS Import Municipality Data from MarketDrive– Town of Lucas		
PAT ACS Import Municipality Data from MarketDrive– Town of Menomonie		
PAT ACS Import Municipality Data from MarketDrive– Town of New Haven	5/9/2011	
PAT ACS Import Municipality Data from MarketDrive– Town of Otter Creek		
PAT ACS Import Municipality Data from MarketDrive– Town of Peru	N/A	N/A
PAT ACS Import Municipality Data from MarketDrive– Town of Red Cedar		
PAT ACS Import Municipality Data from MarketDrive– Town of Rock Creek		

Figure 5 – PAT for importing a single municipality

PAT ACS Import Municipality Data from MarketDrive

Document Number:		Revision #:	0
Status:	Development	Date Last Updated:	4/25/2011

Production Resource Requirements:

Server(s) Hardware:	
Server OS:	
Storage Requirements:	
Software & Version(s):	
Workstation/Laptop Hardware:	
Workstation/Laptop OS:	
Group Policy Object(s):	
Other:	

Notes:

Activity Information:

List out the project activities here	Start Date	End Date
TSK Update Assessment Tracker - Import Data Notice Received		
TSK ACS Import Municipality Data from MarketDrive		
TSK ACS Verify Import Values		
Complete as required		
TSK Update Assessment Tracker - Import Data Correction Sent		
Only complete once all data for municipality imports correctly		
TSK Update Assessment Tracker - Import Data Completed		

g. Task Usage

Using the Phase flowchart you will find Tasks that need to be completed. Each Task box is an individual task. Each of these boxes contains a number. Using this number and the name of the task you will be able to find the corresponding task in this manual in section 5 Individual Tasks.

To complete a task follow the directions in the task until it tell you to stop and perform another task or that the task is completed. Figure 6 is an example task from the ACS Import phase

Figure 6

3.1.1 TSK Update Assessment Tracker - Import Data Notice Received

Constraints / Troubleshooting

Constraints:

Common Problems:

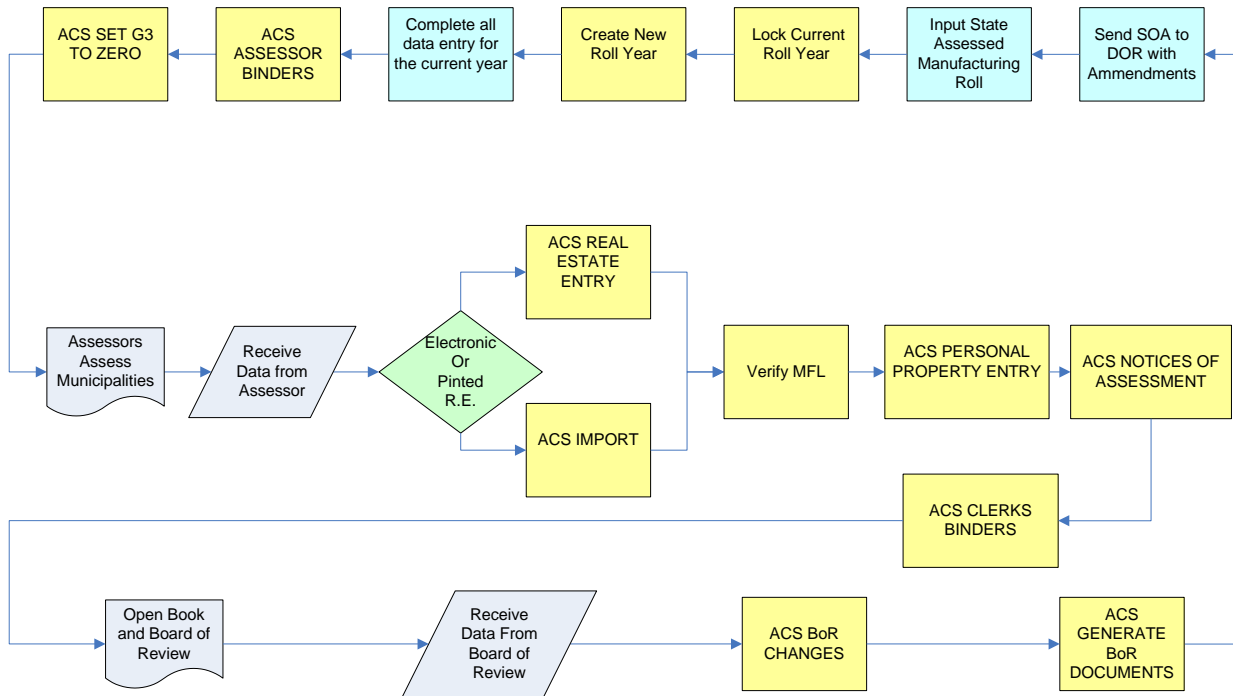
Detailed Steps

- ❑ Determine which municipality or municipalities' data is ready to be downloaded from MarketDrive to the ACS system and note in the table below
 - **Municipality Name:** _____
 - **Municipality Code:** _____
- ❑ Open the AssessmentCycleTracker.xls
 - Current locations is { HYPERLINK "Y:\Project & Planning Section (PPS)\Projects\61973 - Land Information Management System\Sub Projects\61973 - LMS ACS\Development\Documentation\assessment cycle" }
- ❑ Click on the Import Status workbook
- ❑ Find the row that contains the municipality name and code

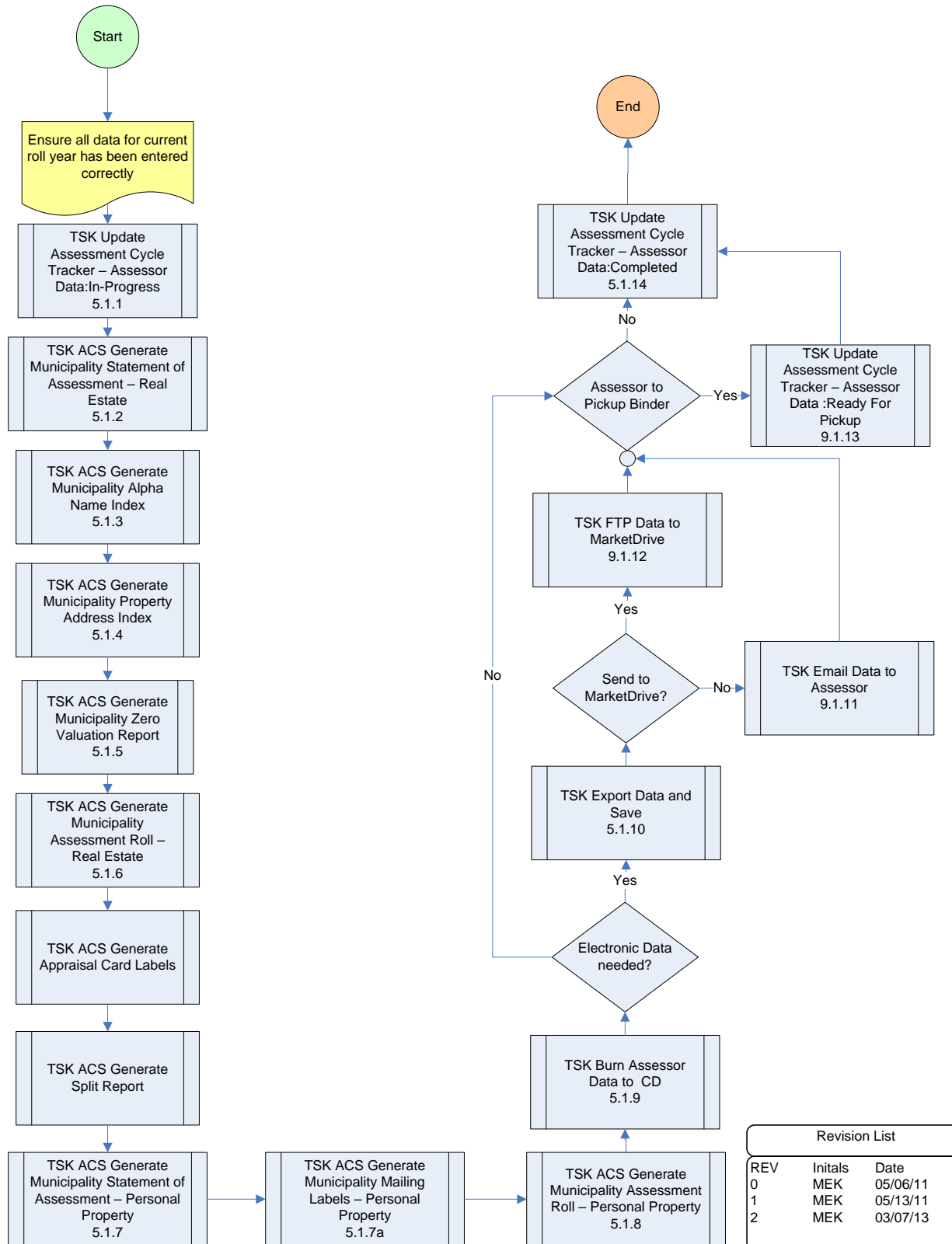
	Muni Code	Muni Type	Muni Name	Date of Initial Notification	Status	Date of Completion
1	602	Team	Coffee			
2	7004	Team	Donut			
3	2005	Team	Elm Gable			
4	2008	Team	Elk Mount			
5	7010	Team	Grass			
6	7012	Team	Hay River			
7	7014	Team	Locals			
8	2016	Team	Macaroni			
9	2018	Team	New Haven			
10	2020	Team	Older Creek			
11	2022	Team	Pine			
12	2024	Team	Rail Cedar			
13	2026	Team	Rock Creek			
14	2028	Team	Sand Creek			
15	7030	Team	Shannon			
16	7032	Team	Sherman			
17	2034	Team	Spring Brook			

- ❑ Enter the date you received notification that the municipality is ready to be imported to ACS
 - The notification may be an email, letter or phone call
 - Verify that the download is present on the MarketDrive FTP server
- ❑ Click the Status field in the row of the municipality then click the down arrow to show the drop down list
- ❑ Select Notice Received and add the current date to the Date Notification column

3. Assessment Cycle Flowchart



4. ACS Assessor Binders



Revision List		
REV	Initials	Date
0	MEK	05/06/11
1	MEK	05/13/11
2	MEK	03/07/13

5. Individual Tasks

TSK Update Assessment Tracker -Assessor Data-InProgress

TSK ACS Generate Statement of Assessment - Real Estate

TSK ACS Generate Municipality Alpha Name Index

TSK ACS Generate Municipality Property Address Index

TSK ACS Generate Municipality Zero Valuation Report

TSK ACS Generate Municipality Assessment Roll - Real Estate

TSK ACS Generate Appraisal Card Labels

TSK ACS Generate Split Report

TSK ACS Generate Statement of Assessment - Personal Property

TSK ACS Generate Municipality Mailing Labels - Personal Property

TSK ACS Generate Assessment Roll - Personal Property

TSK Burn Assessor Data to CD

TSK ACS Export Municipality Data

TSK FTP Data to MarketDrive

TSK Email Data to Assessor

TSK Update Assessment Tracker -Assessor Data-Ready for Pickup

TSK Update Assessment Tracker -Assessor Data-Completed

6 Individual PATs

PAT ACS Generate All Municipalities Assessor Data

PAT ACS Generate Assessor Data