

OPPAL Advisory Committee Meeting Minutes

On Wednesday, January 6, 2016, the meeting of the Optional Personal Property Assessment Link (OPPAL) Advisory Committee was held at 10:00AM in the Revenue Commissioner's Conference Room. Those in attendance included Committee Chairperson Jennifer Byrd, committee members, Mandi Freeman, Greg Norris, Jim Carmichael, Leigh Ann Fair, Wendy Williams, Robert Miller, and Glen Ford. Also in attendance were Department of Revenue employees Derrick Coleman, Will Martin, Debbie Hornsby, Gary Graham, Arleen Alexander, Evelyn Pope, Deputy Revenue Commissioner Brenda Coone, and Revenue Commissioner Julie Magee. Committee members Don Armstrong and Chris Kuykendall were not present.

Committee Chairperson Jennifer Byrd opened the meeting by welcoming everyone and thanking them for their attendance. Julie Magee introduced new Deputy Commissioner Brenda Coone, who will oversee the Property Tax Division and re-introduced Derrick Coleman as new Director of Property Tax. She and Jennifer Byrd thanked the committee members for their dedication to the OPPAL initiative.

Jennifer Byrd then reviewed the minutes from the previous meeting. Mandi Freeman made a motion that the minutes be approved with Robert Miller seconding the motion. The motion carried and the minutes were so approved. Jennifer Byrd then presented the meeting agenda to the committee.

Old Business: Jennifer Byrd announced the change from Excel format to comma delimited format for the upload of data from vendors to OPPAL. After discussions between PCC and the CAMA vendors it was decided that the comma delimited format would work best for everyone.

County PIN access: Jennifer Byrd stated that, as discussed at the last meeting, if a taxpayer or tax preparer needs to retrieve a PIN that will be done through the county tax offices. The counties will provide account numbers through the annual data dump to PCC, who will in turn provide PIN numbers annually. The PIN's will be mailed out to taxpayers' addresses. Counties will receive lists of their taxpayer's PIN numbers for distribution as needed in case a PIN is lost. Glen Ford talked about the system of PIN retrieval in Mobile County. He stated that there should be a uniform system for PIN retrieval that all counties follow. Wendy Williams was concerned about inconsistency among county requirements if a standard was not put in place by ADOR. Jim Carmichael agreed that it would be better to have standards set. Derrick Coleman said that ADOR would need to provide criteria for retrieval of PINs – whether it is a CPA or owner making the request. A discussion of what information would be required to be given by an individual requesting a PIN followed. It was decided by the committee that a letter of authorization for a CPA to receive a PIN would not be necessary, but standard questions that an individual would to answer would be required.

Mandi Freeman asked when the PIN numbers would be mailed out. Jennifer Byrd said that September would be when PINs would be mailed. Mandi Freeman suggested that now would be a good time to contact the Alabama Society of CPA's to tell them that PINs will be coming out in September and to have their clients looking for them to give to their CPA when it is time to file. Jennifer Byrd said that she could contact them. Jim Carmichael suggested that the criteria for retrieving the PIN should be included in the communication to the AL Society of CPA's. Robert Miller suggested that the information be sent now and resent in August as a reminder.

Tax preparer recent filings: Jennifer Byrd brought up the issue that Jim Carmichael presented at the last meeting regarding tax preparers having access to previous filings for businesses that they may no longer represent. After discussing this issue with PCC, she learned that only the last two years of filings would show in the Recent Filings widget. More filings would be available but a user would have to expand the selection in order to see them. Filings will be listed in alphabetical order by date.

Update of testing schedule: Jennifer Byrd reported that March 1, 2016 is the date on which ADOR will begin testing OPPAL in-house. PCC is now working on data conversion and that seems to be going well. They are working through issues with the vendors and analyzing the 2015 data dump that has already occurred.

New Business: Jennifer Byrd informed the committee that OPPAL testing with volunteers outside ADOR would begin as early as April 1, 2016. She asked committee members to be thinking about any contacts they might have for testing volunteers. The testers would be provided with a URL that they could access from their computer. Mandi Freeman asked about what type of businesses testers should be. Jennifer Byrd said that a variety of types of businesses, from large to small would be needed. Robert Miller asked about the April 1 start date and how long testing would last. Jennifer Byrd said that she expected it to last at least 3 months and that CPA's should not feel pressured to test during tax season. Jennifer Byrd asked committee members to bring contact information of potential testers to the next meeting. Julie Magee suggested that there should be a variety of taxpayers in counties with different vendors.

Data map/flowchart from CAMA vendors: Jennifer Byrd told the committee that a data map and flowchart from CAMA vendors showing how data will move through their systems to the counties has been requested to be returned to ADOR by January 15. This information will be used to aid in training the counties for dealing with OPPAL data.

PCC ownership change: Jennifer Byrd discussed the purchase of PCC by another company. GCR is a Louisiana company with greater capital resources that acquired PCC. Derrick Coleman discussed the recent visit to Alabama by the owner of GCR and PCC where ADOR was assured that there would be no difference in the quality of service being providing. Julie Magee pointed out that the State has entered into an escrow agreement with PCC for the ownership of the code. Jennifer Byrd reiterated that PCC has been very flexible and easy to work with throughout this process.

Jennifer Byrd asked for any other business. She stated that ADOR will send out proposed standards to the committee for PIN retrieval. She also stated that by the next meeting there would be a presentation of the system to the committee. Glen Ford asked about the possibility of statewide legislation requiring electronic filing in future. Jennifer Byrd said that she had no idea if that would ever happen but that she has taken some calls with questions to that effect. She stated that education and advertising campaigns should help clear up any misconceptions about OPPAL. Julie Magee stated that there are no benchmarks or expectations for the volume of use of this system. It is merely offering an alternative for taxpayers to e-file. A discussion of electronic filing and cyber security followed.

Jennifer Byrd announced the next meeting would have to be rescheduled due to conflicts with conferences. The meeting date was changed to February 24 in the Revenue Commissioner's conference room and that all meeting date information would be posted on the Department of Revenue website. She thanked everyone for their attendance and the meeting was adjourned at 11:00 a.m.