

OPPAL Advisory Committee Meeting Minutes

On Wednesday, July 1, 2015, the meeting of the Optional Personal Property Assessment Link (OPPAL) Advisory Committee was held at 10:00AM in the Property Tax Division Conference Room. Those in attendance included Committee Chairperson Jennifer Byrd, committee members Don Armstrong, Jim Carmichael, Mandi Freeman, Chris Kuykendall, Robert Miller, Leigh Ann Fair, and Wendy Williams. Also in attendance were PCC Director of Development Kelly Farr and department employees Bill Bass, Will Martin, Gary Graham, Arleen Alexander, Amanda Wolfe, and Revenue Commissioner Julie Magee. Phillip Kinney of Barton & Kinney, LLC was also in attendance. Committee members Greg Norris and Glen Ford were not present.

Committee Chairperson Jennifer Byrd opened the meeting by welcoming everyone and thanking them for their attendance. She reviewed the minutes from the previous meeting. Wendy Williams made a motion that the minutes be approved with Mandi Freeman seconding the motion. The motion carried and the minutes were so approved.

Jennifer Byrd asked the committee for any old business. There was none to discuss.

Jennifer Byrd then introduced items of new business:

Gap Sessions: Jennifer Byrd presented results from the two Gap (information gathering) sessions held with PCC since the committee's last meeting. Topics included screen design, vendor meetings, and a detailed review of the ADV-40 return. She announced that OPPAL has an approved URL (www.OPPALalabama.gov), which Gary Graham indicated would need to be secured by PCC.

Advertising Campaign: Jennifer Byrd began a discussion of the advertising campaign planned for the OPPAL roll out. It will begin in Spring 2016, 6 months in advance of the October 1 go live date. Jennifer Byrd asked the committee members for suggestions of outside organizations' conferences that Dept. of Revenue (DOR) could attend to publicize OPPAL. PSA's will also be used as well as information on DOR and county websites. Bill Bass suggested that information on OPPAL could be included in newsletters and correspondence to various association members.

Jennifer Byrd asked the committee for other suggestions for advertising. Chris Kuykendall suggested a flyer to accompany the county tax notices this year. Jennifer Byrd noted that it might be too early to send something out this year. Mandi Freeman asked if DOR has constant contact or mass email to taxpayers. Gary Graham said no.

New ADV-40: Jennifer Byrd began a discussion of the new ADV-40 form. She noted that a capture of email addresses for taxpayers has been included in the form and will be added by the county vendors to their systems. Other changes included a taxpayer being directed from page 2 of the return to report non-standard avionic equipment on Part A of the form. When a taxpayer logs in to OPPAL, Parts B, B-1, C, and D will look like the return. Data in Parts E & F will be captured and visible to the counties but will only be for informational purposes.

Discussion followed regarding entries into Part B of the return. Some vendors' systems are already set up to for this section. DOR will assist counties to work through any issues of data collection. If the county doesn't enter the information this year separated by which part of the return it was reported on, the taxpayer will enter it the next year into OPPAL. It may take a few years to get the data where it needs to be and have more accurate filings.

Data Standards: Jennifer Byrd stated that data standards are being sent to all county vendors so that fields will be set up and characters available for county entry.

Data dump and testing timeline: Jennifer Byrd stated that there will be a data dump into the OPPAL system and testing will begin thereafter. At the September and November committee meetings more information on that will be available. Beginning October 2015, DOR will begin pulling data from the vendors and doing dummy returns to test the OPPAL system and try to "break" it to work out any kinks.

Jennifer Byrd stated that, at the November meeting, PCC will show the committee the working program with data in the system, showing screens and upload features. By April 2016 several months of user acceptance testing will begin. Jennifer Byrd outlined the steps in that process: CPA's will come in to test; taxpayers will come in to test; as many inputs as possible will be used to make sure the system is user-friendly and nothing is missing. August/September 2016 – the real data dump into OPPAL will occur for an October 1, 2016 go live date.

Bill Bass stated that, once the system is live, the help desk feature will be available to assist taxpayers. The help desk will be staffed by property tax division employees who will be trained and have administrative privileges on the system. If a taxpayer has a property tax question, they will be directed to DOR; if they have a technical issue, they will be directed to PCC.

A discussion of training issues followed. Committee members asked about training for county employees, webinars, and conferences. Jennifer Byrd stated that OPPAL orientation of committee members would take place at the November meeting. Bill Bass said that mid-winter conferences would have a more in-depth coverage of OPPAL orientation.

Secure log-in standards: Jennifer Byrd began a discussion of the PIN notification system. The unique identifier (PIN) for each taxpayer for OPPAL will be assigned after the upcoming data dump. It will be mailed to all users by DOR. Bill Bass told the committee that DOR will forward details on how to use the PIN, when, and why it is designed to change every year. Jennifer Byrd stated that details of the unique identifier are still being worked out. Jim Carmichael asked if the PIN would be by company or location. Jennifer Byrd said that each account and location would have a PIN and discussed how the PIN will work. Mandi Freeman asked if the PIN would change every year and Jennifer Byrd stated that it would. The taxpayer will need to provide their PIN to their CPA to file the return. Eventually, this may be done through encrypted emails rather than mail. Mandi Freeman asked what happens if a taxpayer loses the PIN? Bill Bass said they can call DOR, which should have it on record. Chris Kuykendall questioned why the PIN needed to change each year. Jennifer Byrd said that it would be for security reasons, for example, a taxpayer changes CPA's or employees. She reiterated that this is a PIN number for access to

the account in the OPPAL system, not the account number for the counties. Group discussion followed regarding PINs and other logins, what works and what doesn't.

Mandi Freeman asked if there might be special access, similar to what banks are doing, i.e. smartphone apps? Gary Graham said that DOR would have to look into it.

Jennifer Byrd turned the discussion over to Kelly Farr of PCC. Kelly Farr discussed the progress of development so far, PCC's presentations at the summer conferences of AAAO and AATA, and the project team. He stated that everything is running smoothly at this point. He encouraged the committee to keep up a dialogue with the PCC project team of issues as they arise. Jennifer Byrd asked the committee to email her any questions or suggestions that they have before the next meeting.

Other Business:

A discussion followed regarding possible legal issues with larger counties which have their own personal property reporting websites. The committee questioned whether OPPAL will have a link to county sites. Jim Carmichael asked whether county sites would change to match OPPAL. Jennifer Byrd stated that the county sites would remain the same. Robert Miller asked if taxpayers could use the OPPAL site to report taxes in one of the counties that have their own reporting site and Jennifer Byrd said they could not. There followed a discussion on the ADV-40 and whether these counties should be asking the same information as OPPAL already.

Chris Kuykendall asked if 800 numbers would be available to taxpayers for assistance. Bill Bass stated that they would, as well as a tech support number to be established in early 2016.

Leigh Ann Fair asked about reporting repairs or replacement/additional parts to assets in OPPAL. Jennifer Byrd stated that the asset would have to be reported as disposed of and re-entered as a new part.

Jennifer Byrd pointed out to the committee the task assignments posted around the conference room wall, indicating areas of responsibility for the development of OPPAL.

Chris Kuykendall expressed concern about regular tax preparers outside of a company getting notification of OPPAL. Jennifer Byrd said that DOR is reaching out to as many organizations and professional groups as possible to get the word out. Bill Bass asked for any committee members to recommend groups for DOR to contact. Leigh Ann Fair mentioned the add-on manual on the website. Discussion followed about notification of taxpayers regarding OPPAL. Don Armstrong suggested handing out information when businesses buy their license at the probate office. Arlene Alexander mentioned One Spot push cards that have been supplied to counties and municipalities. She will forward a sample to Jennifer Byrd.

Jennifer Byrd announced the next meeting will be September 2, 2015 in the Property Tax conference room and that all meeting date information is on the Dept. of Revenue website. She thanked everyone for their attendance and the meeting was adjourned at 10:45 a.m.