

### OPPAL Advisory Committee Meeting Minutes

On Wednesday, March 18, 2015, the meeting of the Optional Personal Property Assessment Link (OPPAL) Advisory Committee was held at 10:00AM in Room 1203 of the Gordon Persons Building. Those in attendance included Committee Chairperson Jennifer Byrd, committee members Don Armstrong, Jim Carmichael, Mandi Freeman, Chris Kuykendall, Robert Miller, Wendy Williams, Leigh Ann Fair, and Glen Ford. Also in attendance were Revenue Commissioner Julie Magee, department employees Bill Bass, Hartley McClaney, Derrick Coleman, Will Martin, Gary Graham, Arleen Alexander and Evelyn Pope. Jim Barton, Charles Luper, Will Yarborough and Trent \_\_\_\_ were in attendance as well as Kelly Farr and Vishal Hanjan of PCC. Committee member Greg Norris was 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. Mandi Freeman made a motion that the minutes be approved with Don Armstrong seconding the motion. The motion carried and the minutes were so approved.

Jennifer Byrd stated that the purpose of the meeting was for the full committee to see the presentation that PCC gave for the RFP and to make general comments and ask questions. The presentation began with attendees introducing themselves and explaining their role in the process to the representatives from PCC.

Kelly Farr of PCC began with the introduction of the company and the overview of the project. He then introduced Vishal Hanjan, the project executive, who began a demonstration of the application. The demonstration included a walk-through of the program from the dashboard, instructions, and filing pages. Chris Kuykendall asked about how lost usernames/passwords would be handled. Vishal Hanjan said that, as they have done for other states, the user id information would be retrievable. A discussion of fraud and security issues, including how tight security should be, ensued. Bill Bass commented that, even though identity theft may not be an issue, many taxpayers would not want their competitors or others to get access to their information on this site. Discussion included the use of PIN numbers to protect taxpayer information access. Vishal Hanjan said that mailing of PIN numbers to taxpayers is very common practice and that there are many options for security. Jennifer Byrd commented that after the kickoff of the next phase of development, security issues will be one of the items to be addressed.

Robert Miller opened discussion about the portal's use as a tool for tax preparers to group their clients together under the preparer's identification. Julie Magee stated that this portal is merely a conduit for relaying information about the taxpayer and accounts will not be grouped for CPA or tax preparation firms.

Charles Luper mentioned that a security breach bill is before the legislature this session which could ultimately affect the OPPAL system. Bill SB106 would require consumer alerts in the event of a security breach. Vishal Hanjan said that he would research the bill and its implications for the development of OPPAL.

Hanjan continued the demonstration of the portal. An overview of the data upload process was discussed. Data can either be manually entered or uploaded from an Excel spreadsheet. Either way, Hanjan said, the data will look the same once it is incorporated into the system.

Robert Miller asked about the Excel spreadsheet and its format. Discussion followed regarding taxpayer data. Jennifer Byrd reminded the committee that the 2016 tax year existing data would be pulled and be available for taxpayers' use. Comments were made regarding deletion of property and what information would need to be included, such as date, method of disposal, etc.

Discussion of preparers sending tax returns to property owners before final submission was debated. Points were made as to whether a taxpayer should be able to edit information without informing the preparer. Ultimately, the liability lies with the taxpayer.

E-signature standards were brought up and Vishal Hanjan said that they would adhere to Alabama's e-signature standards. He reiterated that the demonstration flow that was seen during the meeting was only the beginning of the development process and that during the gap sessions that will follow the kickoff more specific needs will emerge and be addressed.

Jim Carmichael asked if multiple jurisdictions would be addressed in OPPAL and Jennifer Byrd said that that had not yet been discussed.

Vishal Hanjan ended the demonstration.

Jim Carmichael commented that he liked the look of the flow demonstration and asked about PCC's experience with other states. Kelly Farr commented on the firm's experience and that the application's design will be simple enough for a fifth grader to understand and navigate.

Jennifer thanked PCC for the demonstration and the committee members for their attendance and comments. She asked for any old or new business. There was no further business.

Jennifer Byrd said that by the next meeting will be May 6 and that all meeting date information is on the Dept. of Revenue website. The kickoff for development of OPPAL will be in April and that she would be in contact with those who should attend. There will then be more to report to the full committee at the May meeting. She thanked everyone for their attendance and the meeting was adjourned at 10:58.