

OPPAL Advisory Committee Meeting Minutes

On Wednesday, May 6, 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, Greg Norris, and Wendy Williams. Also in attendance were department employees Bill Bass, Will Martin, Debbie Hornsby, Gary Graham, Arleen Alexander and Evelyn Pope. Committee members Chris Kuykendall, Robert Miller, Leigh Ann Fair, 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. Don Armstrong made a motion that the minutes be approved with Jim Carmichael seconding the motion. The motion carried and the minutes were so approved.

Jennifer Byrd stated that the main purpose of the meeting was to update the committee on the status of PCC's work on the project and review the kickoff meeting that had taken place in April. Some items that were discussed at the kickoff included:

Security – Jennifer Byrd updated the committee on the discussion of security for the OPPAL system at the kickoff. It will need to be as protected as possible as to taxpayers' personal information. At the kickoff meeting Debbie Hornsby and Gary Graham were asked to look into the question of whether this project would be subject to IRS Publication 1075. Debbie Hornsby and Gary Graham stated that they have not received an answer as yet from Mike Goins with ADOR Security regarding this issue. Debbie Hornsby said that, even if this project is not subject to IRS Pub 1075, the taxpayers' information will still need to be secure.

Data Dump – Tuscaloosa, Elmore, Cullman, and Russell Counties have been sent memos requesting a data dump to PCC along with data dictionaries so that PCC can see what information the counties are capturing and make sure that OPPAL is designed to capture the same information and return it to the counties in usable form.

Mandi Freeman asked if all of the counties are going to dump their data into OPPAL. Jennifer Byrd stated that all of the data would be in the system so that all taxpayers have the opportunity to use OPPAL, whether they choose to or not.

Jim Carmichael asked if this would be the only online system available to taxpayers. Bill Bass stated that it was still to be determined if OPPAL would be able to provide a link to an existing county system or if the taxpayer would be given the choice to file in OPPAL or the existing counties' systems. ADOR's Legal Department is currently reviewing the issue to make sure that no conflict exists between the law and the design of OPPAL.

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

Jennifer Byrd then introduced items of new business:

Jennifer Byrd informed the committee members of the purposes of the kickoff meeting. The meeting was held in April with members of PCC staff and some committee members, property tax division staff, and vendors. Vishal Hanjan, the Project Executive and Andrew Kobetitsch, the Project Manager, were in attendance, as well as Brittany Papa, the Business Analyst assigned to this project. Since the kickoff meeting, a new project manager has been named by PCC, Chris _____ .

Gap Sessions – She explained that the Gap analysis sessions will take place with PCC to break down design topics. The first Gap session will be the week of May 18th with property tax division staff to work on the look and design of the user screens. She stated that some other committee members may be called upon to attend some Gap sessions as well and that if any committee member has anything they feel should be discussed during the Gap sessions to please let her know. Gap sessions will occur once a month and there will be an update given from PCC to Jennifer Byrd on the status of the project every 2 weeks.

At the July committee meeting information from the first two GAP sessions will be discussed.

Bill Bass stated that, in June, PCC will attend the AATA conference to present information regarding OPPAL to the tax officials in attendance. Jennifer Byrd also said that PCC would attend the AATA conference in August to do the same for the county tax support staff.

Webex - There may be some times that PCC will schedule Webex sessions to show the committee their progress or to conduct a Gap session.

Subject Matter Experts (SME) – Jennifer Byrd informed the committee that some members may be called upon in the Gap sessions as SME's on particular aspects of the design of OPPAL. She stated that she would let the committee members know when they would be needed and she asked that they offer their expertise on any subject in which they feel they have specialized knowledge. She stated that PCC would have a list of state and county contacts for use in inviting individuals to participate in the design process as SME's.

Jennifer Byrd gave the committee some examples of the topics of Gap sessions, which include: user accounts, deployment procedures, reporting needs, Help from ADOR employees, user communications, and data transfer.

Jennifer Byrd asked for any new business. Mandi Freeman asked whether the system would request an email address from taxpayers. Jennifer Byrd said that it would. Jim Carmichael asked when the system would be ready for testing. Jennifer Byrd said that by April 2016 it would be available to counties and selected clients to test every possible tax scenario. Jim Carmichael asked if OPPAL was required and Jennifer Byrd answered that it is optional. Discussion followed.

Bill Bass discussed the meeting that was held in April with the county vendors regarding the OPPAL system. Data transfers and their timing were discussed.

Jim Carmichael asked who would send out tax notices and Jennifer Byrd said that they would still be sent out by the counties.

Dan Armstrong expressed concern over OPPAL replacing the electronic filing systems that some counties already have in place. He stated that he is very protective of Shelby County's filing system but is confident that PCC has the capability to create a link to that system for the taxpayer. Discussion followed regarding how OPPAL would interact with the county filing systems and Bill Bass reiterated that no decisions have been made as yet and ADOR's Legal Department is reviewing.

Jennifer Byrd announced the next meeting will be July 1, 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 10:47 a.m.