

Assessment Bulletin

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EQUALIZED ASSESSMENT PANEL TECHNICAL COMMITTEE

EAP Technical Committee Recommendation

Bulletin No. 03-05

ASSET ALTERNATIVE REPORTING PROCESSES

As you know, municipalities are making the transition to the ASSET (Assessment Shared Services Environment) system for the annual reporting of their property assessment information to the province.

Municipal assessors may use one of the following methods for submitting their assessment information to the ASSET system:

- 1) If you do not have access to *milenet*, an alternate reporting process is available as follows:

For each type of data load (annual return, indicator of value, supplementary, and revision submissions), the municipality's assessor should submit a compact disk (CD) or e-mail the compressed XML data file produced by his or her CAMA (computer assisted mass appraisal) system to the Assessment Services Branch of Alberta Municipal Affairs (AMA).

In addition to the compressed XML data file, the following information is a necessary part of the data load procedure. The Assessment Services Branch will enter this information into the ASSET system on behalf of the municipality's assessor.

- **Actual use codes.** The assessor should indicate whether the municipality has used its own customized codes or the standard set of codes outlined in Table 8 of AMA's *Recording and Reporting Information for Assessment Audit and Equalized Assessment Manual*. If the municipality has used its

own codes, the assessor should identify how each code in the municipality's file matches to AMA's standard set of codes.

- **Building classification codes.** The assessor should identify the match between each building classification code and assessment manual combination in the municipality's file, and AMA's standard set of codes (see Table 9 - Model Quality Structure Codes in AMA's *Recording and Reporting Information for Assessment Audit and Equalized Assessment Manual* for a list of AMA's standard codes).
- **Zoning codes and descriptions.** In addition to the zoning codes and short descriptions provided in the municipality's file, the assessor **may** include a more detailed description for each code if the municipality wishes to have that information entered into the ASSET system.

Note: Information regarding audit and equalized assessment recording and reporting procedures may be found on AMA's Web site (www3.gov.ab.ca/ma).

Upon receiving the submission by CD or e-mail, the Assessment Services Branch will, on behalf of the municipality's assessor:

- a. Enter the cross-reference table information, and
- b. Load the data file into the ASSET system.

If the load is successful, a copy of the ratio study results will be e-mailed to the assessor along with the applicable declaration form. The declaration form can then be completed by the assessor and e-mailed back to the Assessment Services Branch.

Once the branch receives the completed and signed declaration form, the load will be flagged as declared and applicable notifications will be sent (by hard copy or e-mail) to the assessor and Chief Administrative Officer.

If the load is not successful, branch staff will work with the assessor to determine what corrective action is required. The assessor may be asked to visit one of the Assessment Audit offices (Lethbridge, Calgary, Red Deer, Edmonton or Peace River) if there are any difficulties in making the corrections.

- 2) If you have access to *milenet*, you may submit your files to ASSET by using a Web browser to download your data.

For more information on the recording and reporting procedures, please refer to your ASSET user manual (tab 7 of the training binder distributed at the ASSET workshops in 2003). If you do not have a copy of this binder, you may obtain one by contacting the Assessment Services Branch of Alberta Municipal Affairs

(AMA) at (780) 422-1377 (to call toll free, dial 310-0000 first) or visit AMA's website at www3.gov.ab.ca/ma.

For *milenet* users, the ASSET user manual explains how to:

- a. Use a Web browser to navigate the Web applications and download/upload files.
- b. Obtain notifications of certain actions such as the loading of data and declaration of your municipality's assessment.
- c. Search and view data.
- d. Conduct analysis and obtain reports.
- e. Maintain code tables.
- f. Manage data.
- g. Load data for three types of audit submissions:
 - Annual return
 - Indicators of value
 - Supplementary assessment

If you have any questions regarding the ASSET *milenet* procedures, contact an ASSET team member for assistance (see attached contact list).

Attachment

ASSET (ASSESSMENT SHARED SERVICES ENVIRONMENT)

CONTACT INFORMATION

Alberta Municipal Affairs – To call toll free, dial 310-0000 first (or #310 if you are calling from a cell phone) and then dial the number of the person you wish to reach.

ASSET Team members (and areas of inquiry)	Further contacts
<p><u>John Scott</u> (any aspect of the ASSET transition) (780) 422-8415, john.scott@gov.ab.ca</p> <p><u>Grant Lloyd</u> (any aspect of the ASSET transition) (780) 427-3170, grant.lloyd@gov.ab.ca</p> <p><u>Sandy Husar</u> (ASSET technical support) (780) 422-8362, sandy.husar@gov.ab.ca</p> <p><u>Pat Chelen</u> (property tax liability codes and equalized assessment) (780) 422-8406, pat.chelen@gov.ab.ca</p>	<p><u>Steve White</u> Executive Director Assessment Services Branch (780) 422-1377, steve.white@gov.ab.ca</p> <p><u>Lynda Downey</u> Director Education Tax and Equalized Assessment Unit (780) 422-8313, lynda.downey@gov.ab.ca</p> <p><u>milenet help desk</u> (780) 422-8074</p> <p><u>Alberta Municipal Affairs' Web site</u> www3.gov.ab.ca/ma</p>

Equalized Assessment Panel Technical Committee – for questions and input into the committee's deliberations on ASSET implementation matters:

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Note to municipal financial administrators: If you have questions regarding the transfer of tax liability data from your municipality's financial system into your assessor's system, please call your financial system-provider.