Remembering
The Little Things

Vanguard Appraisals, Inc. 2012 User Group Meeting

Terri Scheuermann

Iowa Cama Specialist
Tables Section

When viewing a table the default view is in line order. Column sorting has been added to the pricing table viewing grid.

What this means is that while viewing a table you will be able to click on the column heading and the view will sort the table on that column. You will even be able to print in the sorted order.

Limitations include sorting is in ascending order only ~ sorting is done only one column at a time ~ adding lines in the middle of the table is still not allowed, only add at the bottom of the table.

Example Pick a Note table.

Pick a note table is not like all the other tables. You CAN change the lines and not change parcel notes that previously used the pick a notes table. And no revaluation is required.
Within the General Table – The management of depreciation chart years have been split off into a dedicated table. **Base Depreciation tables** have been consolidated and may seem a bit confusing at first glance. Table consist of Location and Class columns and six structure columns.

Once you select Base year, the Adjust Base Year selector screen is displayed.

Select a Location and Class and the selector will try to display the base year making most sense for the given table.

Select a Structure then Base Year and Apply.
The **Set Pricing Methods** utility screen is where Calculations and pricing methods for the jurisdiction are set. Generally speaking the Assessor is the only person that would be given exclusive user rights to this Table option. Any option selected will change values so a Revaluation is required. Exclusive access is required so all users must be logged out and all parcels checked in from the Remote.

**Rounding:** Dependent upon the jurisdiction and state mandates, values are rounded. A rounded number has about the same value as the number, but it is less exact.

- Ones are rounded to the nearest dollar, example $12.50 is rounded to $13.
- Tens are rounded to the nearest $10 dollars, example $45 is rounded to $50.
- Hundreds are rounded to the nearest $100, example $8428 is rounded to $8400.
- Thousands are rounded to the nearest $1000, example $66965 is rounded to $67000.

**Banker's (or Gaussian) rounding** takes the number and rounds it to the nearest even number, so there is no upward bias when rounding x.5, example 5.5 rounds to 6 and 12.5 rounds to 12.

**Acre Precision:** Dependent upon the jurisdiction and state mandates, the number of acres are estimated by two- or three-decimal places.
**Taxing District mode:** Depends upon the state version - clients using the Auto-Complete table would select Multiple. If one taxing district is utilized, select Single.

**Residential Depreciation Defaults:** Assessor determine how-to price detached garages and manufactured homes, either by look-up (table) or with straight-line depreciation.

**Apply map area factor to land:** Land value is calculated with the parcel map factor.

**Apply other obsolescence to Commercial buildings or attached residential garages:** Other obsolescence field is available to enter the obsolescence that is not functional or economic.

**Residential TLA:** Total Living Area is added with either basement finish and/or finished attic area

The current Total Living Area (TLA) calculation consists of:

1. The main building area square footage.
2. Quarters over porches square footage.
3. Any addition square footage.
4. Quarter over garage square footage.

The option to "**Calculate attic space into TLA**" will include: the attic square footage into the Total Living Area calculation.

By activating this feature the TLA calculated will include any Main building attic square footage and any Addition attic square footage.

The option to "**Calculate basement finish into TLA**" will include any basement finish areas of the main building into the TLA calculation.

**NOTE:** Having these options enabled will not affect overall parcel pricing values. However, you would see differences in the calculated TLA displayed.

**NOTE:** We suggest to all clients that the ADD attic space to TLA option be turned on. The Basement finish option should always be set to NOT to be included in the TLA.

**Ag Building - Apply map area factor to ag building:** Building value is calculated with parcel map factor.

The pricing method to apply Map Factor to ag building will ONLY apply when the parcel as a whole is NOT classed either Ag Land or Ag Dwelling. For all other classes of parcels, if there are ag buildings they will have the map factor applied. This is because typically ag buildings are priced on their productivity and not market. Applying a map factor to all classes of ag buildings would cause problems when the user is trying to price and compare ag buildings based on the productivity.

**Apply manual level to building:** Building value is calculated with parcel manual level (determined by parcel class)
Parcel Search Screen

General tab ~ Now included on the General Tab is the Latitude and Longitude of the parcel. This would be beneficial when doing field review. If used in conjunction with your Garmin GPS a parcel could be located very easily and now included in the VCS Import layout.

Photo tab ~ the date taken is displayed above the image. Also if the photo is marked private a P is displayed above the image.

Options to print the current photo also include Full page, Report size, 3 x 5, 5 x 7 and All.

Grouping options include by date, by type and default behavior all.

Parcel search screen ~ Prior year tab ~ The parcel location and class is located on the Prior Year summary. This Prior Year location and class can also be found in the Prior Year information area.
The Favorites Button is used in conjunction with the Query Lite. Once the query lite has been ran you may press the Favorites button and then press the next and previous buttons to toggle through only the parcels found in the query lite search.

Residential, Commercial, Ag buildings and Yard extras all have the option to elect to apply the value to dwelling or improvement without relying on the class to dictate the value type. By Class is default.

The Land Use field in the Site Detail area on the Land tab is a table driven field rarely used. (Discussion who uses the field??) Add the suggested uses to the Land Table and no revaluation is required.

Also on the Land tab are the Land Adjustment fields. Land Adjustments could be saved for each lot basis if applicable. Specific adjustment fields are Topo%, Econ%, Other%. Other available adjustments are to add/deduct a $ amount, deduct $ amount for Vacancy, deduct $ amount for Under Developed, deduct $ amount Until Developed, and Add/Deduct %.

Land Note(s) could be added which can be used to provide a reason for the land obsolescence or adjustment.
The Obsolescence Reason Editor allows for more descriptive obsolescence reasons. Obsolescence is described as a loss of value due to reduced desirability and usefulness of a structure when the design and construction have become obsolete and/or depreciation resulting from wear and tear from use and natural deterioration.

Press the Obso Reasons button to select the descriptors. Obsolescence is selected by checking the box next to the reason, and up to 4 reasons are selected. Obsolescence percentages are entered within the columns next to the checked reason. The percentages are totaled and entered onto Obsolescence without the Obso Override option checked. Note: The obsolescence totals appear with color.

When the Obso Override option is checked, the entered percentage for obsolescence will override any percentage entered on the Obsolescence Reason Editor. When the Obso Override option is not checked, percentages must be entered in the Obsolescence Reason Editor.

The three field definitions are:

- **Functional %** - Enter the percentage amount to indicate super adequacy/inadequacy for these descriptors: Architect/Design (Architectural Design), HVAC, Layout, Over-improved, Oversized, and Plumbing.
- **Economic %** - Enter the percentage amount to indicate an external influence in value. Select the Location descriptor. (Caution: Do not use this field for applying a blanket obsolescence on all parcels within a market area. It is recommended to use Map Area table to apply the blanket obsolescence.)
- **Other %** - Enter the percentage amount to indicate a deduction in value due to some other reason, or to indicate unfinished area to be finished in the main area or addition due to new construction or remodeling (select Until Completed descriptor).

**Partially Completed Residential Property Worksheet**

<table>
<thead>
<tr>
<th>Description</th>
<th>% Total</th>
<th>Completed</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>FOUNDATION (footings, foundation, excavation &amp; backfill)</td>
<td>15%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BASEMENT FLOOR</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BASEMENT STAIRS</td>
<td>1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FLOOR (joist &amp; deck)</td>
<td>7%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FLOOR COVERING</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EXTERIOR WALLS (studs, sheathing &amp; building wrap)</td>
<td>6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SIDING</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WALL INSULATION</td>
<td>1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WINDOWS &amp; DOORS</td>
<td>9%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ROOF (trusses, deck, &amp; shingles)</td>
<td>9%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ROOF INSULATION</td>
<td>1.5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>INTERIOR STUDDING</td>
<td>2%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>INTERIOR DRYWALL (untaped)</td>
<td>5.5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DRYWALL FINISHING (paint, trim &amp; interior doors)</td>
<td>8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ROUGH PLUMBING</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PLUMBING FIXTURES</td>
<td>4%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ROUGH ELECTRICAL</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ELECTRICAL FIXTURES</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEATING INSTALLED</td>
<td>4%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>KITCHEN &amp; BATHROOM CABINETS</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total Percent Completed

Comments:

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

7-81
Validation field on the maintenance Sales Tab is a free form text field similar to the recording number. In Iowa the state assigns a number to track the sale and this is what the field was designed for.

By utilizing the Query Lite with sales the assessor can easily find and track these numbers/sales.

**Photovision Section**

Photos or images may be inserted from the clipboard through a paste routine.

Within the print menu there are options for printing in 3 x 5 and 5 x 7. This is the same available option on the Parcel Search Screen.
Board of Review Manager Section

The Delete Petitions will remove all Board of Review petition information for ALL parcels. Petitions should be deleted from year to year [Next Year]. Select the PDF(s) range to search BOR petitions to delete. An option to copy petition minutes onto a new, private parcel Note is available. This has been expanded to copy all petition information as a Private note. When this option is checked, enter the Note title onto the field. Note: If a petition has multiple minutes, the BOR minutes will be combined into a single note - separated by headings - to conserve space.

When the options are selected, a test mode has been added in order to know which petitions will be deleted. Press the 'Delete' button. A confirmation message will appear asking to delete these BOR petitions. When Yes is pressed, a log will be generated in the screen below of all the parcels that had Board of Review information removed within the chosen PDF(s). To print this log, press the 'Report' button.

When finished printing the report, press the [X] to close the Delete Petitions screen.
Comparable Search Section

Added support for ag outbuildings on the parcel.

Limit comparables to 5 parcels.

Like yard extras, the total value for all ag outbuildings will be lumped together and included in the parcel value. This means you can now perform comparable searches with rural ag dwellings. This option was included to make it easier to perform just an urban search or include rural parcels too.

Sales Ratio Analysis Section

A historical analysis is desirable under certain conditions. This analysis uses values older than the value at the date of the sale. Perhaps you are looking to find trends in your sales. Some states even perform this analysis to locate trends in other counties. During the prepare process, if you choose “Historical” you can now select where this historical value will come from. The default selection is the “Value at Date of Sale which is the VCS value entered on the sale record. Choosing the “most current prior year” works on a per-parcel basis. That is it will pull the total value from the most current prior year for that parcel. Due to splits and combines, parcels may not have the same most current prior year, so this option is useful in these cases. You may also choose to use a specific prior year. When you choose to use a specific prior year, your parcels must have a prior year record for that year to be included in the study. If a parcel does not have a record for that prior year selected its ratio will be zero so it will be excluded. If you happen to have multiple prior year records for the same year, the program will use the value from the most recently entered record.
Transfers ~ VCS Value Export Section

We generally think of the VCS value export as a utility for exporting values only. A little known feature of the export feature is the ability to export data into a comma separated (CSV) file. This file format is used to exchange data between different applications. Options include a field separator and/or a text delimiter to denote stop and start points of data.

Another little known feature is the ability to export Parcel Extended Information. Certain tax administration packages require this extra file while for others it is optional. Of course, its use is not restricted to just tax packages; the data exported can be invaluable for any number of uses. During the regular VCS Value Export process, if the option to Export Extended Parcel Info is checked, a file with this information is produced.

Transfers ~ VCS Import Section

The VCS Import (or PC Import) has an option allowing for import into specific PDFs. By doing this user’s with duplicate parcels (in different PDFs of course) can finally use the import to update parcels. For example, you could exclude the “retired parcel” PDF thereby ensure that duplicate PINs in the other PDFs can still get their names and addresses updated.

Transfers ~ Batch Photo Import Section

A little known option imports photos and documents as a batch process. The import supports matching to the parcels PIN or computer ID number.

The process is as follows:
Import From/Into

1 - Enter the path to locate the photo/document directory. Check the option to Include Subdirectories. Press the ellipse button to help locate the directory.

2 - Press the Select PDFs button to select the PDF range to import the photos/documents.

3 - Select to match the Parcel PIN or Computer ID from the file or directory name at select the starting position.

4 - Determine whether the Parcel PIN is masked.

Files to Include

5 - If Standard Photos/Images are selected, select to Import as a Picture, Document, Other, DICED. Check if the image is private. Determine the Date Taken from the file, image or today's date. Enter any keywords for the batch.

6 - If Multi-page Photos/Images are selected, select to Import as Document, Picture, Other, DICED. Check if the image is private. Determine the Date Taken from the file, image or today's date. Enter any keywords for the batch.

7 - Check the option to Skip previously imported files. If the option is unchecked, images that were already imported will be duplicated.

8 - Check the option to delete file upon successful import. If option is unchecked, image files will remain in the directory.

Report Options

9 - Log for Errors only

10 - Option to print All imported parcels and errors

11 - Press Reports to save or preview log to print.

Import process

11a - To run a test import, check the Test Only box.
Query Section

When setting query filters, the default view is sorting in code order but you can change the view to sort by selected column. An example would be the map number field.

Map Area Table
Sorted List View

Query Wizard Preferences

A per-user setting to **auto-sort table fields** within the Query Wizard exists. Some users say it is easier to find table fields if they are alphabetized. This option gives users the choice. Note: This is simply a visual change and does not physically change existing

Have you ever wanted to run the Query Wizard and be in Parcel Maintenance at the same time? YOU CAN.

Just set the appropriate User Preference.
VAI Website Options

Important News Section on the website Main Page is completely user maintained.

Building Search Option allows searching for parcels based on Residential and/or Commercial Occupancy, Residential Style, the Yard Extra type and Ag Building type.
The **Current Value Header** is a special header that no other vendor has. There can be no question as to what year the website values represent and when the value is payable.

The **Get Current Year Tax Estimate** allows the user to estimate the tax.
**Tax History** is an invaluable tool. Minimal tax information shows Assessed Value, Taxable Value and Tax.

A picture is worth a thousand words and the online **GIS maps** are worth a million. The addition of maps allows the “general” public an easy view of their property. Ask me about the map discount!!
Questions ???