

# KCAA Enhancement Committee

Kansas Orion Users Conference

November 4, 2016

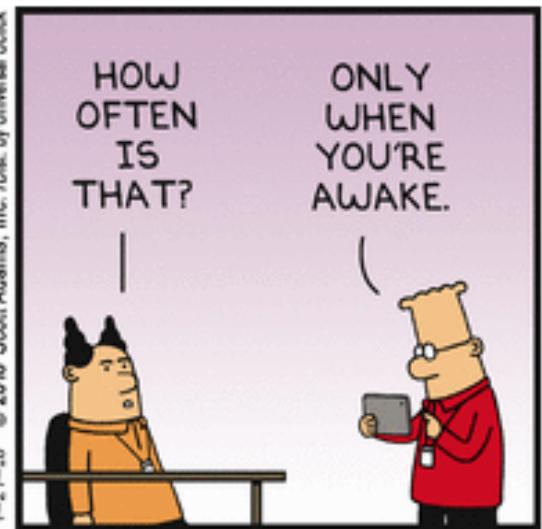
Chris Morlan, AAS RMA



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# KCAA Enhancement Committee Members

- \* Chris Morlan – Chair, Sedgwick Co.
- \* Allen Todd– Riley Co.
- \* Steve Bauman – Shawnee Co.
- \* Brad Eldridge – Douglas Co.
- \* Philip Dudley – Franklin Co.
- \* Jim Lampe – Atchison Co.
- \* Greg McHenry – Riley Co.
- \* Janae Robbins – Wyandotte Co.
- \* Barry Porter – Republic & Cloud Co.
- \* Rae Schnacker – PVD
- \* Jim Shontz - PVD
- \* Greg Wellbrock – Several Counties
- \* Clint Anderson – Bourbon Co.
- \* Robin Knoblauch – Pott. Co.

# Recent Enhancements

- \* Expanded Property Record Card – began in 2013
  - \* Submitted SOW May 2015
  - \* Delivered in Patch 2016.21
  - \* Still a few Issues:
    - \* Sketches on Property node to Print as Last Page
    - \* Adding Situs Address to Manuf. Home Section
    - \* Discussing Legend for Sketch pages
  - \* Development scheduled for 4<sup>th</sup> Quarter 2016

# Current Enhancements

## Manufactured Home Park Income & Survey

- \* Modeled after Johnson County added Income Models – Mini-Storage, Golf Course
- \* Started Discussion w/ Tyler in mid-2015; Submitted Signed SOW May 2016 - \$27,000
- \* Development scheduled for 4<sup>th</sup> Quarter 2016; should be available in Spring 2017 Patch
- \* Most of Enhancement Cost is Setup and Configuration for each site; Quoted for 20 Setups; 12 Counties have Requested to be Setup:
  - \* Butler, Crawford, Ellis, Finney, Geary, Johnson, Pottawatomie, Riley, Saline, Sedgwick, Shawnee, & Wyandotte

# Current Enhancements

## Manufactured Home Park Income & Survey

### MH PARK INCOME APPROACH

Income Value: **\$ 788,734**

#### Income Approach Manufactured Home Parks

LBCS Structure	<b>Manufactured Home Park</b>	Number of Single Wide Lots	<b>30</b>	Investment Class	<b>C</b>
MH Park Name		Number of Double Wide Lots	<b>20</b>	Market Area	<b>NO</b>
Valuation Yr.		Number of Triple Wide Lots	<b>10</b>	LBCS Function	<b>1165</b>
Override Market Area		Total Number of Lots/Spaces	<b>60</b>	Total Actual Revenue	

#### Rate Overrides

Single Lot Rent OVR	
Double Lot Rent OVR	
Triple Lot Rent OVR	
Miscellaneous Revenue OVR	<b>\$50.00</b>
Vacancy & Collection OVR	
Expense OVR	

#### Model Rates

Single Lot Rent	<b>\$150.00</b>
Double Lot Rent	<b>\$250.00</b>
Triple Lot Rent	<b>\$325.00</b>
Miscellaneous Revenue	<b>\$0.00</b>
Vacancy & Collection Rate	<b>0.15</b>
Expense Rate	<b>0.30</b>


#### Rent Values

Single Lot Rent	<b>\$54,000</b>
Double Lot Rent	<b>\$60,000</b>
Triple Lot Rent	<b>\$39,000</b>
Miscellaneous Revenue	<b>\$ 600</b>

#### Income Approach

##### Overrides

Cap Rate OVR	
ETR OVR	
EGI OVR	
NOI OVR	

Comments  2014 review property info for def

Lump Sum Adjustment	<b>DEFERRED MAINTENANCE</b>
Percentage Adjustment	<b>EXTERNAL OBSOLESENE</b>

Note: Can only use Lump Sum or Percentage; not both

##### Cap Rate

Apply ETR	<b>Yes - default</b>
Cap Rate	<b>0.0925</b>
ETR	<b>0.0250</b>

Adj. 1	<b>\$ -10,000</b>
Adj. 2	<b>5%</b>

##### Calculations

Potential Gross Income	<b>\$ 153,000</b>
Vacancy & Collection	<b>\$ 22,950</b>
Miscellaneous Income	<b>\$ 600</b>
EGI	<b>\$ 130,650</b>
Expenses	<b>\$ 39,195</b>
NOI	<b>\$ 91,455</b>
Overall Cap Rate	<b>0.1175</b>
Preliminary Value	<b>\$ 798,734</b>
Adj. 1	<b>\$ -10,000</b>
Adj. 2	
Adj. 3	
Calc Income Value	<b>\$ 788,734</b>
Value Per Lot/Space	<b>\$ 13,146</b>

Income Value: **\$ 788,734**

# Current Enhancements

## Manufactured Home Park Income & Survey

### KCAA MANUFACTURED HOME PARK INCOME-EXPENSE SURVEY

Manufactured Home Park Income-Expense Survey			
Community / Park Name	<input type="text"/>	Survey Year	<input type="text"/>
Additional Parcels	<input type="text"/>	Appraiser	<input type="text"/>
		Date Entered	<input type="text"/>
		<input type="radio"/> Multiple Parcels - Yes <input checked="" type="radio"/> Multiple Parcels - No	
Source Information			
Source	<input type="text"/>	Date on Source	<input type="text"/>
Source Name	<input type="text"/>	Source Phone #	<input type="text"/>
		(000-000-0000)	
Income			
ITEMS INCLUDED IN RENTAL		REVENUE:	
Water/Sewer	<input type="text" value="Yes"/>	Single Lot Rent	<input type="text"/>
Trash	<input type="text" value="Yes"/>	Double Lot Rent	<input type="text"/>
Gas	<input type="text" value="Yes"/>	Triple Lot Rent	<input type="text"/>
Electric	<input type="text" value="No"/>	Misc. Income	<input type="text"/>
Other	<input type="text" value="No"/>		
		Effective Gross Income	<b>\$300,000</b>
		Misc. Income % EGI	<b>0.00</b>
		Vacancy % EGI	<b>0.00</b>
		Total Revenue OVR	<input type="text"/>
		Number of Single Lots	<input type="text"/>
		Number of Double Lots	<input type="text"/>
		Number of Triple Lots	<input type="text"/>
		Total Number of Lots	<input type="text"/>
		Single Lot Occupancy %	<input type="text"/>
		Double Lot Occupancy %	<input type="text"/>
		Triple Lot Occupancy %	<input type="text"/>
Expenses			
Property Taxes	<input type="text"/>	Taxes % EGI	<b>0.00</b>
Property Insurance	<input type="text"/>	Insurance % EGI	<b>0.00</b>
Repairs / Maintenance	<input type="text"/>	Repairs/Maint. % EGI	<b>0.00</b>
Admin / General	<input type="text"/>	Admin/General % EGI	<b>0.00</b>
Management On-Site	<input type="text"/>	Manag(on-site) % EGI	<b>0.00</b>
Management Off-Site	<input type="text"/>	Manag(off-site) % EGI	<b>0.00</b>
Utilities	<input type="text"/>	Utilities % EGI	<b>0.00</b>
Advertising	<input type="text"/>	Advertising % EGI	<b>0.00</b>
Other/Misc.	<input type="text"/>	Other/Misc. % EGI	<b>0.00</b>
One Time Expense	<input type="text"/>	One Time Exp. % EGI	<b>0.00</b>
Total Expenses with Taxes	<b>\$300,000</b>	Tot. Exp. w/ Taxes % EGI	<b>0.00</b>
Total Expenses w/o Taxes	<b>\$280,000</b>	Tot. Exp. w/o Taxes % EGI	<b>0.00</b>
Net Operating Income	<b>\$0</b>		
NOI: \$0			
Comments	<input type="text"/>		

# Current Enhancements

## Manufactured Home Park Income & Survey



Sample County, Kansas Office of the County Appraiser

### 2014 Income Valuation Worksheet Manufactured Home Park

#### Property Information

Property Number	215-15-0-11-01-001.00	Market Area	NE
QuickRef ID	R123456	LBCS Structure	
Page	1 of 1	LBCS Function	1165
Building Name	Sunflower MH Park	Investment Class	C
Address	1234 E Smith Rd. Somewhere, KS 67000	Gross Building Area	
		Year Built	

#### Estimated Income

Lot/Space Type	# of Lots	Eff Rate/Lot	Monthly Income		Estimated Income
Single Wide	60	\$150.00	\$ 9,000.00	Gross Potential Income	\$ 228,000
Double Wide	40	\$250.00	\$ 10,000.00	35% Vacancy & Collection	\$ 79,800
Triple Wide	0	\$325.00	\$ 0.00	Miscellaneous Income	\$ 600
Total Lots	100			Effective Gross Income	\$ 148,800

#### Estimated Expenses

Expenses		Expense Totals
Percent of EGI	30.00%	Estimated Expenses \$ 44,640
		Estimated (N.O.I.) \$ 104,160

#### Value Capitalization

Capitalization Rate	0.1025	Preliminary Value	\$ 850,286
Effective Tax Rate	0.0250		
Total Cap Rate	0.1225	Final Value	\$ 850,300
		Final Value per Lot/Space	\$ 14,172

#### Summary Totals

	Income Workup Total	\$ 850,300
	Residual Land	\$ 0
	Total Income Value	\$ 850,300
	Ag Total	\$ 0
	Misc Improvements	\$ 0
	TOTAL Value	\$ 850,300



# Current Enhancements

- \* Save Cursor Location – Find a Property page
- \* In Next Patch - 2016.34

The screenshot shows the 'Find a Property' web application interface. The browser title is 'Find a Property' and the menu includes 'File', 'View', 'Tools', and 'Help'. The Orion logo is visible in the top left. A sidebar on the left contains navigation links: Appraisal Home, Property (Add a Property, Find a Property, Property History, GIS Map), Party (Add a Party, Find a Party, Related Party Groups), Lease (Add a Lease, Find a Lease), Reporting, and Activities (List Manager). The main content area is titled 'Find a Property' and features several search sections: 'Search by Identifiers' with fields for Quick-Ref ID, Property ID, and Legacy ID; 'Search by Party Information' with a Party Type dropdown (Owner), checkboxes for Standard, Business, and Non-Standard, and fields for Search Name, First & Middle, Phone, Owner ID, and Legacy ID; and 'Search by Situs Address' with radio buttons for Standard and Non-Standard, and fields for Location / DBA, No., To, St., Unit, No., City, State, and ZIP Code. On the right side, there are buttons for 'Property History', 'Save My Settings', and 'Use Advanced Search', along with 'Search Options' (Show 10 Matches Per Page, Search by Tax Year 2017), 'Property Status' (Active, Inactive), 'Property Display Options' (Initial Tab: Appraisal), and 'Locations'.

The screenshot shows a 'Search by Field Options' dropdown menu. The 'Default Field' is 'Quick-Ref ID'. The dropdown list contains the following options: Quick-Ref ID (highlighted), Property ID, Legacy ID, Asmt Code, Custom Field, Party Type, Search Name, First & Middle, Phone, and Owner ID.

# Current Enhancements

- \* Save Cursor Location – Find a Property page
  - \* In Next Patch - 2016.34

- \* Quick-Ref ID
- \* Property ID
- \* Legacy ID
- \* Asmt Code
- \* Party Type
- \* Search Name
- \* First & Middle
- \* Phone
- \* Owner ID
- \* Legacy ID (Party)
- \* Street No.
- \* Street
- \* Location / DBA
- \* Map ID
- \* Routing No.
- \* Permit No.
- \* Lender Acct. No.
- \* Tax Unit Acct
- \* Appeal Case No.
- \* Instrument No.
- \* Deed Book
- \* COV
- \* Section
- \* VIN/Serial No.
- \* License Plate #
- \* Subdivision

# Current Enhancements

- \* Page Through Photos after Enlarging
  - \* Tyler has started Development
  - \* Should be available in Spring 2017 Patch

The screenshot shows a web application interface with a top navigation bar containing links for 'Cost Report', 'Income Valuation Report', 'Comparable Sales Report', and 'Records'. Below this, there are several sections: 'Owner/Mailing Address' with owner 'KENNEY, WILLIAM VINCENT & AUDREY J' and address '123 S BYERS AVE CLEARWATER KS 67026-7808'; 'Taxing Units' for '5401 130 CLEARWATER U-'; 'Inspection History' with a list of dates and descriptions; 'Images' with a 'Prev' button and a thumbnail of a house; and 'Land Detail' with a table of property information.

Class	Sq. Footage	Acres	Appraised	Assessed
Residential - R	11,854	0	\$18,000	\$2,070
<b>Totals</b>	<b>11,854</b>	<b>0</b>	<b>\$18,000</b>	<b>\$2,070</b>

The screenshot shows a photo viewer interface with a toolbar at the top including 'Fit to Width', 'Page 1 of 1', and 'Mag Glass'. The main area displays a photograph of a single-story house with a stone and siding exterior, a white garage, and a red SUV parked in the driveway. At the bottom, there is a green navigation bar with 'Prev', 'Image 2 of 3', and 'Next' buttons, and a yellow 'Exit' button. A black bar at the bottom of the photo contains the text '091110420101800 12/13/2011'.

# Current Enhancements

- \* Residential Building Percent Complete
- \* Ready to Assign to Business Analyst

**RESIDENTIAL BUILDING NEW CONSTRUCTION PERCENT COMPLETE PAGE**

---

**Residential Building New Construction Percent Complete**

QuickRefID/ PropertyID	R123456 / 001-123-45-0-67-89-001.00-A	Date	<input type="text"/>
Property Address	1234 N. Main St., Anytown	Appraiser	<input type="text"/>
Owner	John & Jane Doe	Construction Start Date	<input type="text"/>
Builder	Acme Builders	Estimated Completion Date	<input type="text"/>

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**Construction Item / Activity Completed**

<input checked="" type="checkbox"/> Permits Issued	0.50	0.50
<input checked="" type="checkbox"/> Excavations, footings, and foundation	9.00	9.50
<input checked="" type="checkbox"/> Floor joist set and sub-floor laid	4.50	14.00
<input checked="" type="checkbox"/> Wall partitions and roof framed	9.50	23.50
<input checked="" type="checkbox"/> Wall and roof sheathed	4.50	28.00
<input checked="" type="checkbox"/> Chimney and fireplace in	5.00	33.00
<input checked="" type="checkbox"/> Plumbing roughed in, sewer and water connected	4.50	37.50
<input checked="" type="checkbox"/> Basement floor poured	3.25	40.75
<input checked="" type="checkbox"/> Roof shingled	1.75	42.50
<input checked="" type="checkbox"/> Windows installed	3.75	46.25
<input checked="" type="checkbox"/> Wiring roughed in	2.50	48.75
<input checked="" type="checkbox"/> Heat ducts roughed in	2.50	51.25
<input checked="" type="checkbox"/> Gutters and down spouts	0.75	52.00
<input checked="" type="checkbox"/> Furnace installed and basement ducts installed	4.00	56.00
<input checked="" type="checkbox"/> Insulation placed	2.00	58.00
<input checked="" type="checkbox"/> Drywall finished	2.25	60.25
<input type="checkbox"/> Front and rear steps, porches and decks	1.50	61.75
<input type="checkbox"/> Siding installed and cornice finished	7.00	68.75
<input type="checkbox"/> Exterior trim, windows and trim primed	2.00	70.75
<input checked="" type="checkbox"/> Kitchen cabinets and tops installed and trimmed	3.50	74.25
<input type="checkbox"/> Floors laid (linoleum or hardwood)	5.50	79.75
<input type="checkbox"/> Plumbing fixtures installed and complete	4.00	83.75
<input type="checkbox"/> Interior doors and trim installed	6.00	89.75
<input type="checkbox"/> Finish hardware installed	1.50	91.25
<input type="checkbox"/> Interior walls, trim and doors painted or varnished	4.00	95.25
<input type="checkbox"/> Carpet installed or hardwood floors finished	1.00	96.25
<input type="checkbox"/> Light fixtures installed	1.00	97.25
<input type="checkbox"/> Exterior painted, two coats	2.25	99.50
<input type="checkbox"/> Grading of lot, landscaping complete	0.50	100.00

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**Total Percent Complete: 63.75%**

Comments

# Next Enhancements for Estimate of Hours

- \* Mass Delete of Documents
  - \* Working out Project Specifications between the Committee and Tyler
- \* Income Reports
  - \* Brad Eldridge working with PVD staff
- \* Sales Ratio Reports
  - \* Getting Input on Desired Changes; Advice from PVD

# Current Enhancements

- \* Prior Year Calculation Change
  - \* will allow counties to apply the Prior Year value on the Final Value tab and display the exact prior year value on the Assessment tab, avoiding the need to ‘override’ values on the Assessment tab, mainly resolving issues with the Ag Use Land Value.
  - \* ~~Submitted for Estimate Oct. 2015~~; Discussing with Committee, PVD, & Tyler

# Recent Requested Enhancements

(since last year's conference)

- \* Display the Property Type in the results of a Party Search
- \* Add ability to attach a specific photo to the Comp Sales Report
- \* Sort by ParcelID in the Batch Appraisal Card Processing
- \* Display QuickRef on Market Extract Edit List
- \* Ability to save MRA Sales List Report as an Excel file
- \* Increase the number of Sales displayed on each page; Sort Ascending/Descending
- \* Make Dialog box resizable for "View Sales" under the Maintain Market Models
- \* Automatically update the Acres field in the Legal Description from the Calculated Land Size of the Property page

# Recent Requested Enhancements

(since last year's conference)

- \* Final Review Program - Having a Sort option to sort by name, as well as User, is needed.
- \* Add Apex sketch and Sketch as an option under the Appraisal Card form types in the Property Header
- \* Add "Division", "Additional Info" fields & "Comments" from Legal Description section to the vwPropertyLegal table
- \* Display the "Comments" field from a building permit on the front page of the PRC in the Parcel Comments section
- \* Add the ability (a checkbox) to not have a GIS service displayed on the Orion Map at startup. Ideally, GIS map display settings could be user defined.
- \* Expand MIPI functionality to include "MapID", "Routing No.", and "Comments" fields from the General Tab



# Recent Requested Enhancements

(since last year's conference)

- \* Add Total Acres under the Acres field in the Ag Land grid display. Also add Total Market Acres and Total Acres for the record.
- \* System will produce an Error or Warning message when a date is in the future for Inspection History.
- \* Add Comments Fields to Ownership tab and Party records. Comments placed on Party records would be linked to and display on the Ownership tab.
- \* Place Miscellaneous Value on PRC

# Older Enhancement Requests

- \* Ability to enter identical units for components to buildings.
- \* Provide a manual that illustrates the relationships between the data tables for the commercial property valuations that run in the Cost & Income approaches to value
- \* Expand File types for attachments under the Documents tab
- \* Need report export option to run mass export of attached documents (SVQs, PDFs, Photos, Forms, etc.) from the Document tab.

# Grouped Enhancement Requests

## \* CRS –

- \* Add "Division", "Additional Info" fields & "Comments" from Legal Description section to the vwPropertyLegal table (recent)
- \* Provide a manual that illustrates the relationships between the data tables for the commercial property valuations that run in the Cost & Income approaches to value
- \* Add a Submit button to the CRS Build job so that it will move to the Job Queue immediately
- \* Ability to select year(s) to perform a CRS Clean & Build, instead erasing all data years from CRS

## \* Job Processing –

- \* Add multiple sort options to all lists- neighborhood, address, market area, neighborhood, subdivision, situs address, etc.
- \* Add a checkbox to the parameter screens to "attach" documents produced through running Group Appeals/Print Appointment Letters, Property Forms, Appeals Forms and Final Letters
- \* Add property number to the sort options when running Batch PRCs

# Grouped Enhancement Requests

- \* Final Review –
  - \* Add functionality for populating the values by classification to occur for ALL overrides; not just the market and cost.
  - \* Ability to "hot-key" or link to an Orion Record from the Final Value Review program
  - \* Provide ability to access/request All Parcel reports from Final Review program
  - \* Having a Sort option to sort by name, as well as User, is needed. (recent)
- \* Marshall-Swift Configuration -
  - \* Residential component for brick or flagstone patios on sand or gravel
  - \* Increase M&S minimum on carports = 100 Sq. Ft.
  - \* Add "SF Finished w/HVAC" and/or "% Finished w/HVAC" field
- \* PRC
  - \* Display combined square footages of multiple buildings
  - \* Add Comments field association with the New Construction Override Value field.
  - \* Display the "Comments" field from a building permit on the front page of the PRC in the Parcel Comments section (recent)
  - \* Place Miscellaneous Value on PRC (recent)

# Grouped Enhancement Requests

## \* Market Modeling -

- \* Display QuickRef on Market Extract Edit List (recent)
- \* A request to pull the prior year F or R values from the assessment tab to the comp sales report.
- \* Global variable for subject only MRA value
- \* Make Dialog box resizable for "View Sales" under the Maintain Market Models (recent)
- \* Creation of a Market Variable Report (1 page only) when selecting the "where" conditions
- \* Creation of a report to display & print after running the Batch Sales History Capture job.
- \* Ability to save MRA Sales List Report as an Excel file (recent)
- \* Increase the number of Sales displayed on each page; Sort Ascending/Descending
- \* Some additional stats on the performance of a model which can be viewed from the Define Model screen after the model is calculated.

# Grouped Enhancement Requests

## \* Security – System Configuration –

- \* Ability to re-size any and all dialog boxes by clicking on the side or corner.
- \* Read only fields are grayed out to the point of being very difficult to read.
- \* Provide an "Undo" button
- \* Add the functionality of being able to hover over a field and the reporting name appears to other tabs
- \* Ability to set up Macros when doing repetitive data entry

## \* Transfers –

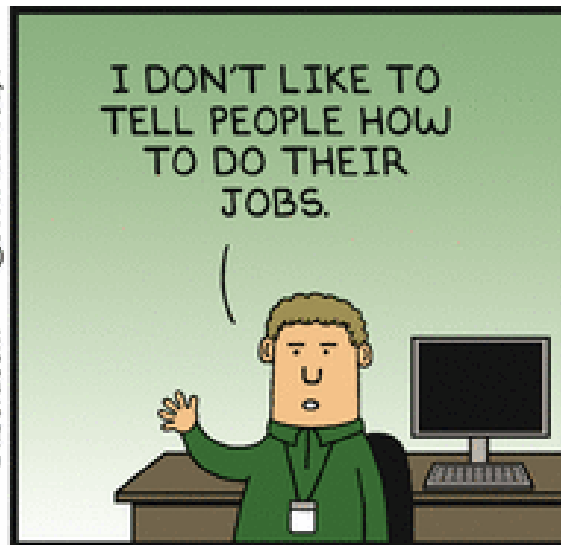
- \* Add reasons to "Adjustments to Sale Price" / Sale Price Adj. table. 1-Property rights; 2-Conditions of Sale; 3-Expenditures made immediately after the sale.
- \* System provides a validation warning if a user adds a parcel to Additional Properties section of a Transfer record that has a different ownership than the primary parcel.
- \* Display the SQV in Sales Info on Summary tab

# Recent Client Funded Enhancements

- \* Mass Import of Situs Address – Crawford
- \* Add Alternate ID similar to PropertyID – Johnson
- \* Added Nine Fields to vw\_PropertyFinalValue – Sedgwick
  - \* Ag Buildings
  - \* Misc Buildings
  - \* Indexed Value
  - \* Prior Year Land Value Difference & Percent Difference
  - \* Prior Year Building Value Difference & Percent Difference
  - \* Prior Year Total Value Difference & Percent Difference



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# Questions & Suggestions

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# Thank you