KCAA Enhancement Committee

Kansas Orion Users Conference

November 4, 2016
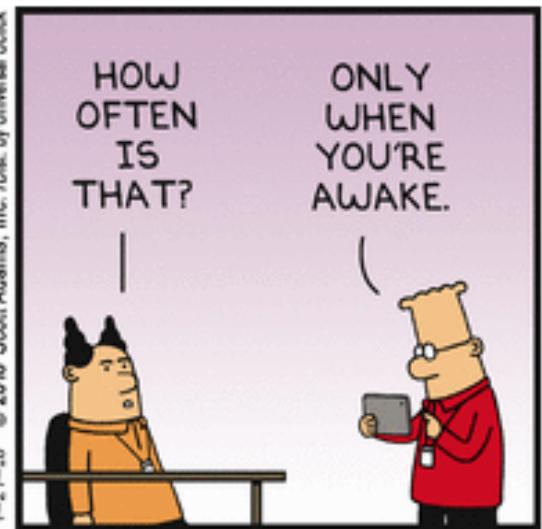
Chris Morlan, AAS RMA

published: Tuesday, September 27, 2016

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 4th 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 4th 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

Current Enhancements
Manufactured Home Park Income & Survey

KCAA MANUFACTURED HOME PARK INCOME-EXPENSE SURVEY

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.	Gross Building Area	
	Somewhere, KS 67000	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

Date Printed: 10/2/2014

Current Enhancements

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

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

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
Property Address	1234 N. Main St., Anytown	Appraiser
Owner	John & Jane Doe	Construction Start Date
Builder	Acme Builders	Estimated Completion Date

Construction Item / Activity Completed

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

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
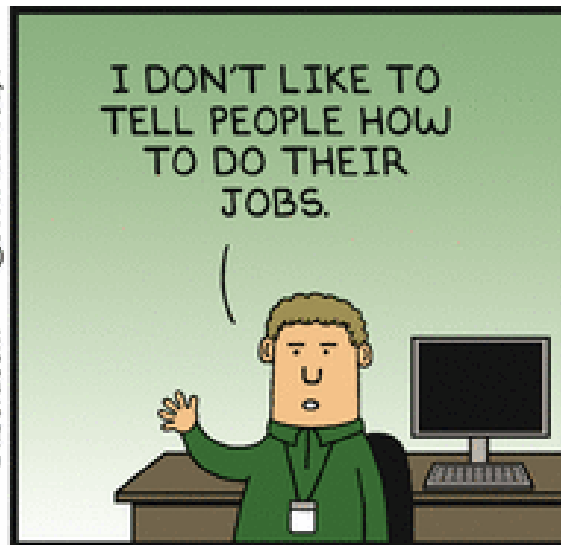
published: Saturday, September 17, 2016

Questions & Suggestions

Chris Morlan

Chris.Morlan@sedgwick.gov

316-660-9273

Thank you