

Planned Progress Report Instructions
Revised 5-14-09

1. The planned progress report is required at the beginning of a reappraisal as a part of the reappraisal plan.
2. The monthly breakdown on the planned progress report represents work scheduled from the 20th of the previous month through the 19th of the current month.
3. Place a check mark next to either "Phase 1" or "Phase 2" at the top of the page.
4. Do not include exempts as part of planned progress.
5. Basic breakdown for Phase 1 of the planned progress report must be by township-range or city. Partial township-ranges may be described by section or as part (Pt) of a section or township-range. A section or township-range listing is understood not to include any city parcels within that section or township-range when those city parcels are listed elsewhere, so "Pt." should not be used to describe that situation.
6. A geographical area that takes more than one month to complete must include "Pt" for each scheduled month.
7. A breakdown by city or township-range is not required for Phase 2 of the planned progress report. However, a per month total is required.
8. Setup or Maintenance scheduled at the beginning of the year should last no longer than 3 months for most counties and no longer than 6 months in the largest counties.
9. "Number of Parcels" during Phase 1 refers to the number of parcels each month for which data collection, any necessary follow-up review, and the resulting data entry is scheduled to be complete. Do not enter anticipated totals for data collection only or data collection/review only.
10. Completion of Phase 1 must be scheduled no later than April 19th of the valuation year.
11. "Number of Parcels" during Phase 2 refers to the number of parcels each month for which valuation and corresponding entry into the CAMA system is scheduled to be complete. This includes lot values, location factors, and soil coding where applicable.
12. The Phase 2 schedule can begin at any time during the reappraisal and can be broken down per month by segment, such as lot valuation or location factor analysis. However, totals should only be entered when parcels are scheduled to be Phase 2 complete. For each property type, valuation must be complete for at least 50% of the parcels, subject to minor revisions, by April 19th of the valuation year. Final values shall be made available for placement on the assessment rolls by July 1 of the valuation year.
13. Data collection/review and data entry for agricultural use parcels is considered complete when data collection/review and data entry of improvements has been done. Use determination can be made on site and/or with up-to-date aerials and is considered part of the valuation process for audit purposes.
14. Use the "Other Tasks Planned" column to describe work such as "Setup", "Maintenance Only", or "Lot Valuation". List "Soil Coding" if soil coding dates are different from data collection/review and data entry of agri parcels. No totals are needed for these "Other Tasks Planned".
15. List the per year percentage (current year only total divided by overall total, expressed as a percent to the nearest 1/10) of planned parcels at the right side of the "Geographical Area" column below December of each Phase 1 year; for example: **2010 TOTAL 46.3%**. Insert the yearly total on the same row in the "Number of Parcels" column.
16. It is required for 3 year reappraisals that at least 40% of Phase 1 parcels are scheduled to be complete at the end of year 1, at least another 40% of Phase 1 parcels are scheduled to be complete at the end of year 2, and the remaining 20% or lesser amount are to be scheduled to be complete by April 19th of the valuation year.
17. For 5 year counties, the corresponding Phase 1 percentages are 20% each for the first 4 years, and the remaining 20% or lesser amount by April 19th of the valuation year.
18. Enter the overall Phase 1 (or Phase 2) total at the end of each phase, in the "Number of Parcels" column. Label it as "Phase 1 Total" or "Phase 2 Total", using the right side of the "Geographical Area" column. Phase 1 and Phase 2 totals must match. If an adjustment is needed for Phase 1 due to parcels to be combined or due to a change of count since the ACD official count, list the "Phase 1 Total" on one row, "Less Adjustment*" on the next row, and the "Adjusted Phase 1 Total" on the last row. Describe the Phase 2 totals in a similar fashion. Comments for both Phases should include the statement "Adjustment accounts for parcels to be combined and any change of count since the ACD official count." The adjusted totals should equal the reimbursable amount.
19. An approved planned progress report may require revision if it is discovered at any time before or during the reappraisal that the plan does not conform to requirements of the Assessment Coordination Department's *Rules and Regulations*.