

With a Presentation By:



Evolution of Assessment

Presenters

CATALIS

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Overview

Historic methods

- Why some are still being used

Software and how it should support assessors

- Software available to assessors
- Integrations with software
- Discussion on what assessors want in their tools

Current ways to find efficiencies

- CAMA lot Workgroups
- Desktop Assessment (Presentation by Strathcona County)

Question Period

Materials presented at Association professional development events and activities and posted online are for training purposes. The respected opinions expressed are the considered and subjective views of the trainers/presenters. Permission should be obtained for use other than training purposes and references cited.

Assessment Data Entry

Historic for some But Current for others



“It’s the way we’ve always done it”

Software Vs Paper

Cost

Time

Rate Payer During Inspection

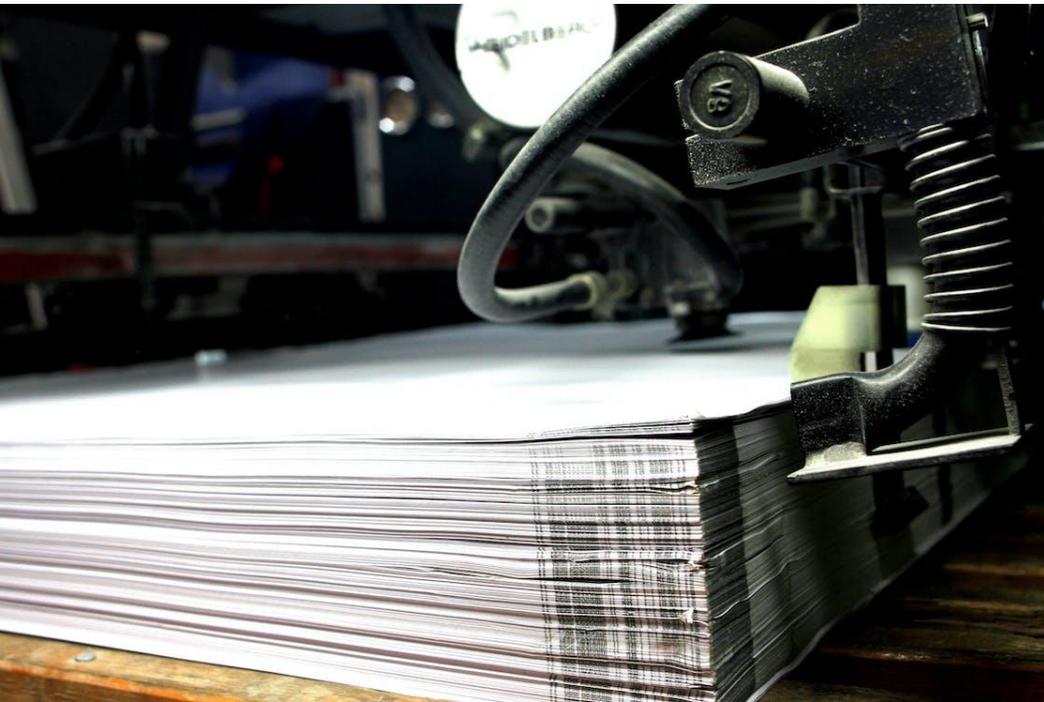
Double Entry

Internet

Property owners becoming more Tech Savvy

Employee Safety

Employee Work \ Life



The Big 4 and Honourable Mention

1. CAMA
2. GIS
3. Tax (ERP)
4. Planning/Engineering
Asset Management



Software and how it should support assessors



CAMA

(Computer Assisted Mass Appraisal)

SKIP



“Thomas, stop asking me if we can do something... we can do anything”

- Anatoli

Different ways to use GIS

Overlays and images

- Internal overlays to show details
 - Development
 - Road systems
 - Pipes and hydrates
 - Many more

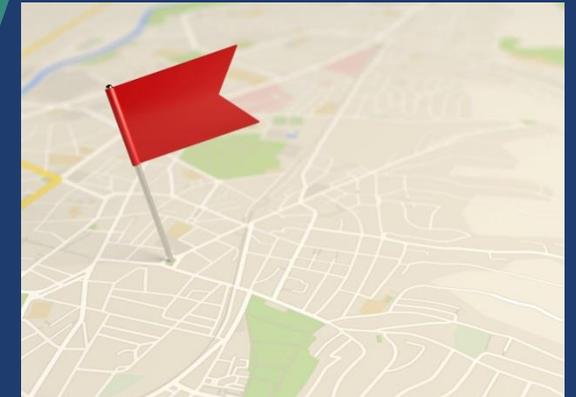
Data review

- For rotations can align data entry with previous inspections to track what areas have been complete.
- Review market adjustments on properties.

Information for Rate Payers

- Rate payers are becoming more accustomed to having information at their finger tips. GIS is a tool that can easily display data for them.

When GIS receives data it becomes a very powerful tool, receiving data from multiple sources will allow assessors to make better decisions.



GIS
(Geographic Information Systems)

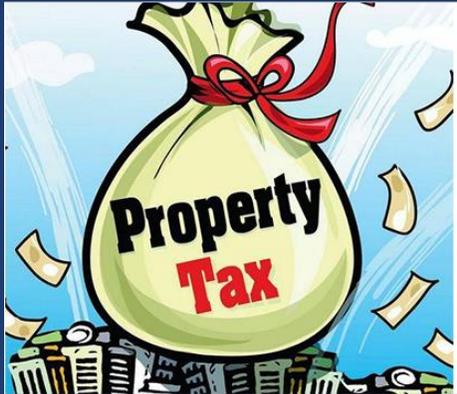
Assessment and TAX working together

Full Integration

- Imagine being able to access the tax/ERP system with the click of the button
 - Many time's the conversation can shift from assessment to tax. Imagine having a button to open the property in your tax system. Help the rate payer with their payments questions, discuss ownership, and more
- Automatic updates between the systems
 - Select which system has priority information, tax system in charge of ownership CAMA feeds assessment as example

Partial Integration

- The Tax Clerk can import the CAMA xml file with the click of the button
- Balancing assessment between the CAMA and ERP
- The ERP system can also create the ASSET file – and verify the school support and requisition body code prior to creating the xml file to send to you



Tax \ ERP
(Enterprise Resource Planning)

Permits for the assessor

Envision being able to access development and building permits without waiting for the municipal office

Being able to view supporting documentation, (Blueprints, Contact person, etc.)

Having a workflow that would automatically notify you the permit has been created

- Will be able to plan your annual permit inspections
- Workgroups could be automatically updated and assigned, current method for most is having a team member manually update narratives or workgroups



Planning / Development

Bringing your tools together, what it could look like

- Able to review the most accurate up-to-date data
- Help eliminate human error
 - Data entry errors are going to happen but with less of it we can reduce the chance of it happening
- Faster workload planning
 - With updates sent daily you can manage your workload as it comes in, instead of being surprised before a deadline
- Help eliminate the communication disconnect between departments
 - Won't have to wait for one department to send that updated spreadsheet
- Get your experts on assessment, not data plugging
- Data entry should only be done once on any system
 - Currently a lot of repetitive data entry between all 5 systems





CATALIS

ADVANCING GOVERNMENT. ENGAGING CITIZENS.



Discussion

- What do you want your software to offer
- How can software help eliminate inefficiency
- Better way to do things
- Outside of CAMA most used tool for assessors
- Ideas for the future (CAMAlot and other tools)

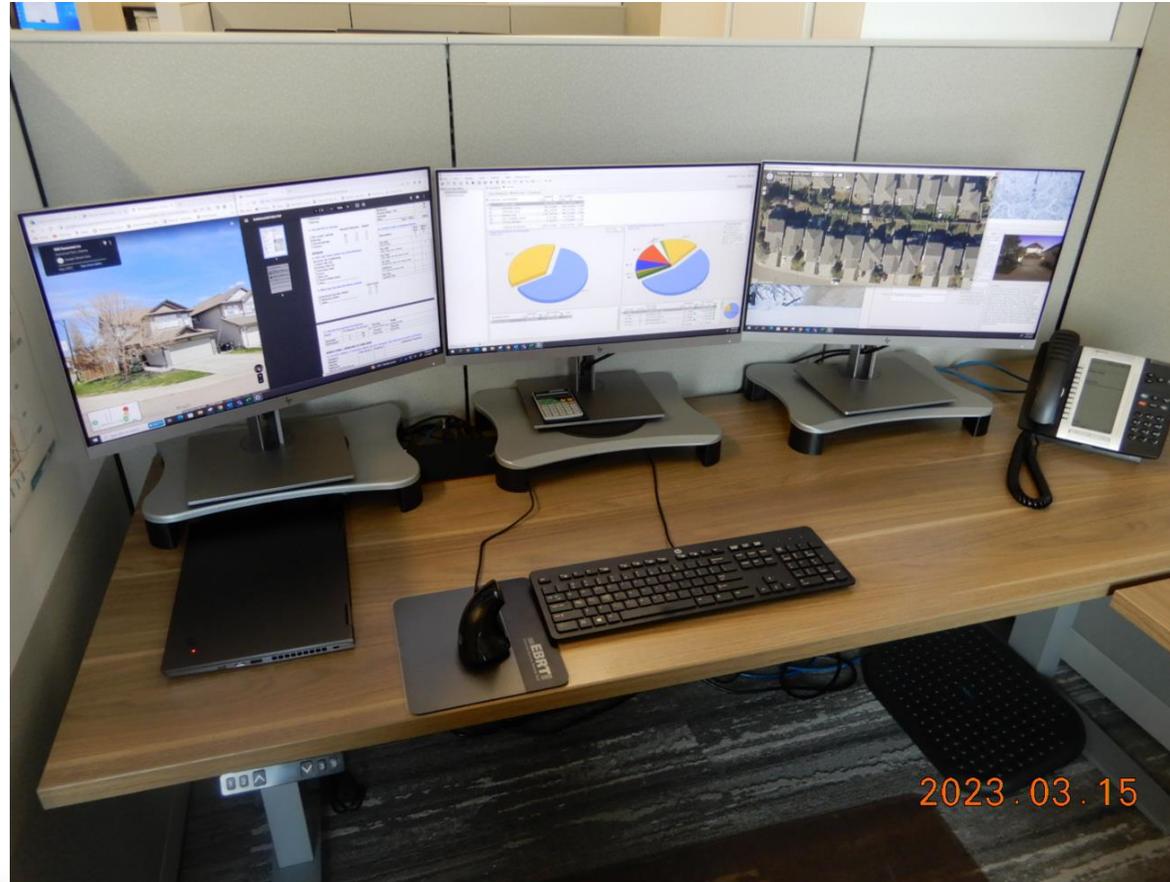


Workgroups Demonstration

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Desktop Assessment

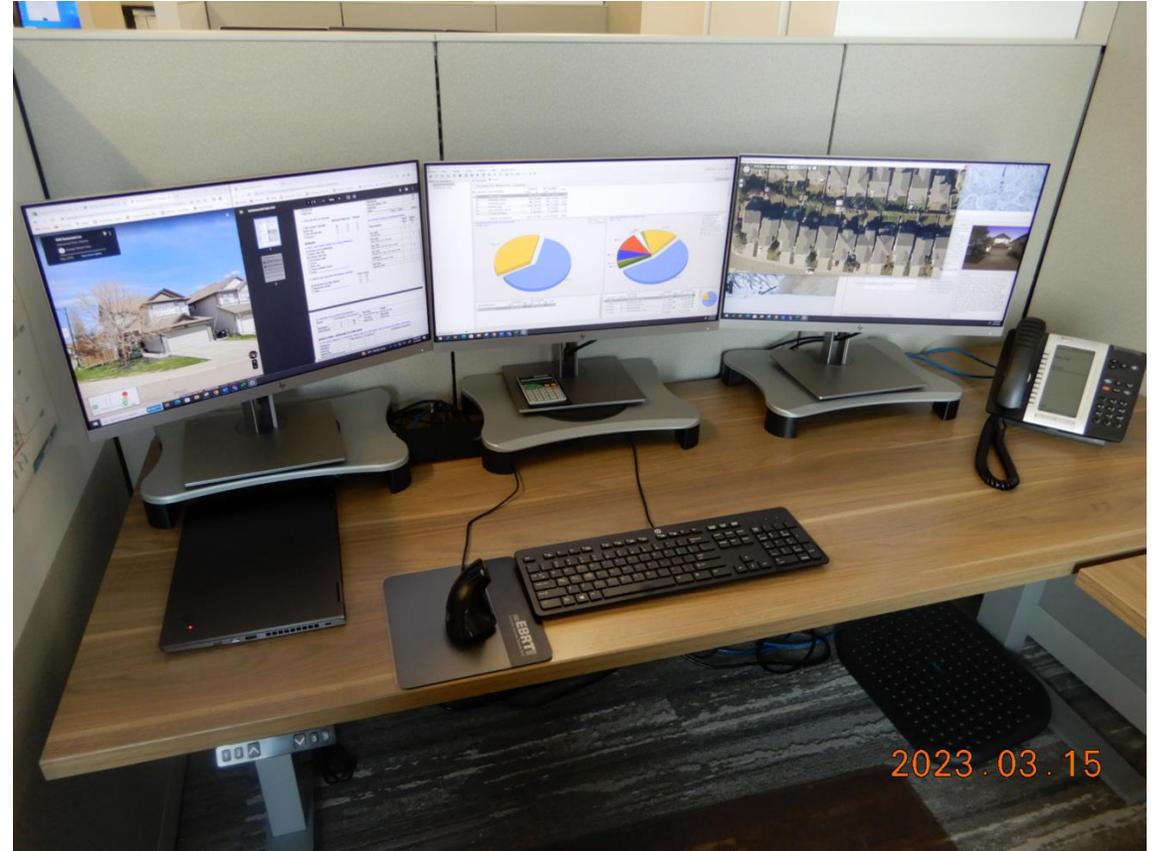


Overview

- Completing a Desktop Assessment
 - Walk through the steps & tools Assessors use to complete a desktop assessment
 - Workgroups
 - Residential RFIs
 - MLS Data
 - Google Maps – Street View
 - Posse – Plans & Permits
 - Eagleview Oblique Imagery
 - Spatial Data (GIS)

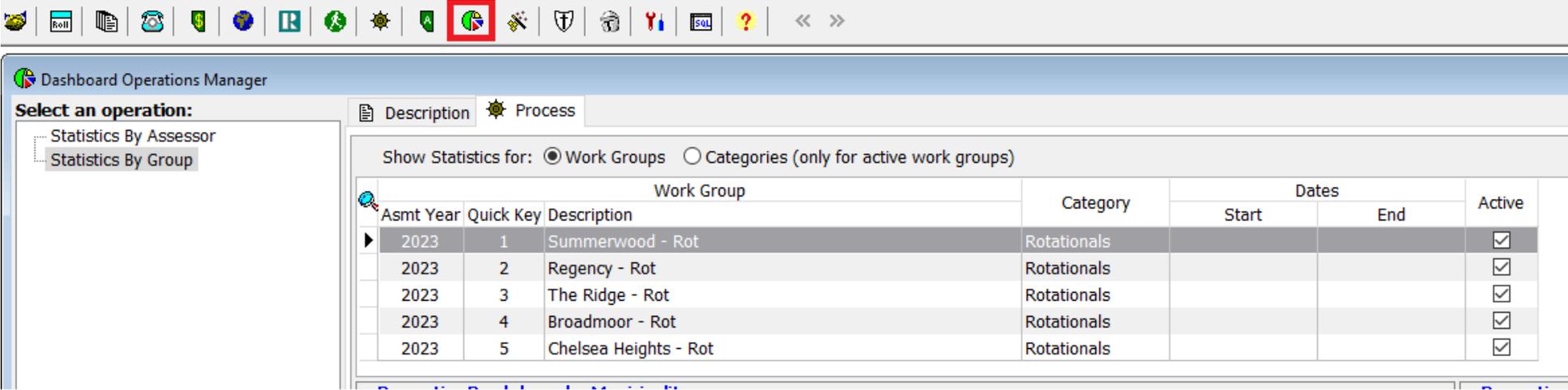
Completing the Desktop Assessment

- Work stations typically have 3 monitors for easy viewing of all the data
- Typically one monitor has a PDF RFI, one has Eagleview or Internal Assessment Mapping tool, and one has CAMA lot software. Posse/permit information is also used when applicable.



Workgroups (Organizational Tool)

- Workgroups provide workflow efficiency and help us keep track of current and future work, both for rotational and annual work.



- Work can easily be distributed between assessors, to ensure everyone is on track and not overwhelmed.
- Clicking Green Dots creates a list of properties to review.

Last First Name	Completed			Not Completed			Total
	Count	%		Count	%		
AIELLO, ERIN	27	30.00%		63	70.00%		90
GRAZIANO, Daniel	2	2.38%		82	97.62%		84
HODGSON, Carrie	4	3.85%		100	96.15%		104
MOORE, Greg	44	34.38%		84	65.63%		128
TIPTON, BRENNEN	0	0.00%		7	100.00%		7

Points of focus

- Model – Quality – Structure confirmation
- Quality adjustment information
- Variations confirmation
- Effective Age chart
- Additions or demolition changes
- Land and Market influences

Review available information

- Was the RFI completed?
 - Online, mailed in or phoned in....Or, not at all
- View parcel using Eagleview images
- Is there MLS data?
- View parcel from Street View on Google Maps
- View POSSE permit information to determine if permits have been taken
- View Geographic Information Systems for market influences

Covid-19 Impact

- RFI response rate helped avoid negative perception of onsite inspections with the pandemic
- Assessors were able to complete most duties in a hybrid fashion as required
- Direct line phone numbers for assessors helped increase response time to rate payers and questions regarding RFIs
- Voicemails can be accessed through Microsoft Outlook to ensure little delay in response time

Step 1 – Preliminary Overview of Property

Open the Subject parcel in CAMA lot

- Do a quick review of the information present on the parcel including Model-Quality-Structure, Quality Adjustment and Effective Age.
- Do a quick review of the Market Land influences.



Summary Report

As of: 03-02-2023

Roll: 7360008003	
Legal: 0125921 360 8 NE-25-52-23-4	
Description:	
Address: 318 FOXBORO CIRCLE	Subdivision: Foxboro
Zoning: Single Detached Residential B	
Actual Use: Primary: R10100	
Market Loc: 7216 Foxboro-RP lots	Assbl. Land Area: 692.0 Sq. Meters
Econ. Zone: Sherwood Park	
Assbl. Party: I Individual	
Owner: GRAZIANO DANIEL & CHAKRABARTY RASHMANI	
318 FOXBORO CIR	
SHERWOOD PARK AB T8A 6K1 CANADA	



Market Value Land

LandID	Base Code	Site Area	Services	Location Adj.	Asmt	Code	Value
210021723	6 R1B/R1C	692.0 Sq. Meters	100%	100%	300	100%	206,000
Categories		Details	Factors	Inf %	Inf \$	Serv. Cost	Serv. Cost \$
15 Misc.	4 Cul-De-Sac		2 Factor 2	2.0%	0	2.0%	0
6 Location	18 Green Area		10 Factor 10	10.0%	0	10.0%	0

Improvements

ImprID	MT- Qu- St	Description	Area (Ft2)	Eff. Year	Asmt	Code	Value
210054786	004-04-09	Residence	1,890	2002	300	100%	289,000
210071580	030-06-28	Garage	577	2002	300	100%	29,000

Assessment Totals

Tax Status	Code	Description	Land	Improvement	Other	Assessment
T	300	*Residential Improved or Occ	206,000	318,000	0	524,000
Grand Totals:			206,000	318,000	0	524,000



Step 2 – Opening an RFI

Open the completed RFI.

- The RFI's can be completed on-line, mailed in, or by phoning in. Once complete, they will be loaded under the RFI button.



RFI Button

A screenshot of a software window titled "Request For Information [7360008003, 318 FOXBORO CIRCLE]". It shows a table with columns for Survey, Request For Information, Report, and Dates. A light blue arrow points from the "Open the RFI" label to the "Filled In Online" column.

Survey			Request For Information	Report	Dates	
Key	ID	Description	Created Date	Response Method	Filled In Online	Received
1669	259	Foxboro & Foxhaven	09-05-2017	Filled in on WEB	10-11-2017	

Open the RFI

Residential RFI – Urban (Round 1)



Complete Survey Online: vps.camlot.ca/rfi
 Roll: 7372029001
 Survey Key: 1890 (The Ridge & Regency)

Residential Request for Information

Property Address: 549 RAINBOW CRESCENT

Daytime Phone Number:

Email Address:

EXTERIOR

1. Describe the roofing material:

- Asphalt shingle roof
- Shake roof
- Clay tile roof
- Metal roof
- Other _____

2. Which of the following does the property have?

- No deck or patio
- Open (uncovered) deck / patio
- Covered deck
- Enclosed deck / Sunroom
- Stone / brick / concrete patio
- Solarium
- Balcony

3. Describe the car storage:

- | | | | |
|--|-------------------------------------|--------------------------|--------------------------|
| | Attached | Detached | Heated |
| <input type="checkbox"/> No carport / garage | | | |
| <input checked="" type="checkbox"/> Garage | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Second garage | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Carport | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

INTERIOR

4. Does your home contain any of the following?

- Central air conditioning
- Indoor hot tub
- Outdoor hot tub
- Secondary suite
- Sauna
- Walk out basement
- Theatre/media room
- Other (Nothing) _____

5. Which best describes the kitchen cabinets:

- | | |
|--|--|
| | Solid Veneer |
| <input checked="" type="checkbox"/> Hardwood (eg Oak, Maple) | <input type="checkbox"/> <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Melamine (white) | <input type="checkbox"/> <input type="checkbox"/> |
| <input type="checkbox"/> Other _____ | <input type="checkbox"/> <input type="checkbox"/> |

6. Which best describes the kitchen countertops:

- Laminate / arborite or similar (usually has visible seams)
- Granite, marble or similar (usually has no visible seams)
- Other _____

7. Indicate number of and type of fireplace:

	#	Built-In	#	Free Standing
Gas		<input type="checkbox"/>		<input type="checkbox"/>
Wood/Pellet	1	<input checked="" type="checkbox"/>		<input type="checkbox"/>
Electric		<input type="checkbox"/>		<input type="checkbox"/>

8. Areas with in-floor heating (check all that apply):

- Main floor
- Upper floor
- Basement
- Bathrooms only
- Garage
- Other _____

9. Describe the flooring materials (excluding the basement):

Flooring Type	% of Coverage
Carpet	40
Linoleum	10
Hardwood	50
Ceramic Stone / Tile	
Laminate	
Other	
Total = 100% 100%	

10. Indicate number of plumbing fixtures:

Description	Main Floor #	Upper Floor #	Bsmt/Lower #
2pc bath (sink & toilet)	1		
3pc bath (sink, toilet, tub or shower)		1	1
4pc bath (sink, toilet, tub with shower head)		1	
5pc bath (double sink, toilet, tub, shower stall)			
Additional (ex: separate shower stall)			
Bar Sink			
Laundry Sink			

11. Describe the basement development (total percent of area must = 100%):

Room	# of Rooms	% of Area	Flooring (eg. carpet/laminate)	Walls (eg. paneling/drywall)
Developed	3	85	Laminate	Drywall
Undeveloped				

RENOVATIONS / UPGRADES

12. For each category, if renovated, indicate the year renovated. Add comments for further clarification.

Category	Year Reno'd	% Reno'd	Additional Comments
Windows	2017	100	
Flooring	2017	100	
Bathrooms	2000	100	
Interior paint/baseboards	2017	100	
Exterior finish			
Interior & exterior doors	2017	100	
Electrical upgrades (ex: fixtures, panel/wiring)	2017	50	

13. Other Renovations. Indicate original or year renovated. Add comments for further clarification.

Category	Year Reno'd	Additional Comments
Roof covering	2017	
Kitchen cabinets	2017	
Kitchen counters	2017	
Furnace / boiler	2012	
Hot water heater	2017	

14. Please describe each addition. Add comments for further clarification.

	Structural Addition	Year Built	Sq.ft.	Dimensions	Additional Comments
1.					
2.					
3.					

15. Are there structural issues with the property? Please describe. (e.g. horizontal foundation cracks, flooding issues)

16. All the information provided is true and accurate to the best of my knowledge.

Signature _____ Date _____

Personal information is collected under the authority of section 33 (a) and (c) of the Freedom of Information and Protection of Privacy Act and will be used for the purpose of determining a fair and equitable assessed value of your property. If you have questions regarding the collection, use or disclosure of this information, contact the Assessment and Tax Department at 780-464-8196 or assess@strathcona.ca.



Residential RFI – Urban (Round 2)



Complete Survey Online: rfi.camalot.ca
 Roll: 7372029001
 Survey Key: 1138
 Regency
 Filed In Online: 12/16/2022

Residential Request for Information

Property Address: 549 RAINBOW CRESCENT

Daytime Phone Number:

Email Address:

INTERIOR

1. Describe the basement development (total percent of area must = 100%):

Room	# of Rooms	% of Area	Flooring <small>(e.g. carpet/laminate)</small>	Walls <small>(e.g. paneling/drywall)</small>	Additional Comments
Developed	3	85	carpet	drywall	
Undeveloped					

RENOVATIONS / UPGRADES

2. For each category, if renovated in the last 5 years, indicate the year renovated. Add comments for further clarification.

Category	Year Reno'd	% Reno'd	Additional Comments
Exterior finish			
Windows			
Exterior Doors			
Bathrooms			
Interior paint	25	2017	
Interior Doors	80	2019	
Flooring			
Trim <small>(e.g. baseboards, window and door moulding)</small>	100	2017	
Electrical upgrades <small>(e.g. fixtures, panel/wiring)</small>			

3. Other renovations. If renovated in the last 5 years indicate the year renovated, add comments for further clarification.

Category	Year Reno'd	Additional Comments
Roof covering		
Kitchen cabinets		
Kitchen counters		
Furnace / boiler		
Hot water heater		

4. Are there structural issues with the property? Please describe. (e.g. horizontal foundation cracks, flooding issues)

5. All the information provided is true and accurate to the best of my knowledge.

Signature _____ Date _____

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Completed Condo RFI



Complete Survey Online: vps.camalot.ca/rfi
 Roll: _____
 Survey Key: _____ 2020 Apartment Condominium

Apartment Condominium

Property Address: _____
 Daytime Phone Number: _____
 Email Address: _____

INTERIOR

1. How many bedrooms/dens/lofts are in the unit?

Bachelor
 1 bedroom
 2 bedrooms
 3 bedrooms
 4 bedrooms
 1 den
 1 loft
 Other _____

2. Does the unit have any of the following? Check all which

In-suite laundry
 Air conditioning
 Patio
 1 balcony
 2 or more balconies
 Enclosed balcony
 Walk-in closet

3. Describe the flooring materials:

Flooring Type	% of Coverage
Carpet	30
Linoleum	
Hardwood	50
Ceramic Stone / Tile	20
Laminate	
Other _____	
Total = 100%	100%

4. Please describe your bathroom(s). Check all boxes that

	1st Bathroom	2nd Bathroom	3rd Bathroom
Toilet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sink	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tub	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shower Tub	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shower Stall	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jetted Tub	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Which best describes the kitchen cabinets:

<input checked="" type="checkbox"/> Hardwood (eg Oak, Maple)	Solid	<input checked="" type="checkbox"/>	Veneer	<input type="checkbox"/>
<input type="checkbox"/> Melamine (white)		<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/> Other _____		<input type="checkbox"/>		<input type="checkbox"/>

6. Which best describes the kitchen countertops:

Laminite / arborite or similar (usually has visible seams)
 Granite, marble or similar (usually has no visible seams)
 Other _____

7. Indicate number of and type of fireplace:

	#	Built-In	#	Free Standing
Gas	<input type="checkbox"/>		<input type="checkbox"/>	
Wood/Pellet	<input type="checkbox"/>		<input type="checkbox"/>	
Electric	1		<input type="checkbox"/>	<input checked="" type="checkbox"/>

RENOVATIONS / UPGRADES

8. For each category, if renovated, indicate the year renovated.

Category	Year Reno'd
Roof covering	
Windows	
Kitchen cabinets	
Kitchen counters	
Bathrooms	
Electrical upgrades (ex: fixtures, pane/wiring)	
Flooring	
Exterior finish	
Interior & exterior doors	
Interior paint/baseboards	2020

9. Your comments:
 no comments

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Completed RFI ready for review – Rural

Roll: 1104101009

Roll: 1104101009



Complete Survey Online: vps.camslot.ca/ri
 Roll: **1104101009**
 Survey Key: **9440** TWP 51-20 & 51-21 & 51-23

Residential Request for Information

Property Address: S1076 RGERD 213

Daytime Phone Number:

Email Address:

EXTERIOR

1. Describe the roofing material:

- Asphalt shingle roof
- Shake roof
- Clay tile roof
- Metal roof
- Other _____

2. Which of the following does the property have?

- No deck or patio
- Balcony
- Solarium
- Enclosed deck / Sunroom
- Open (uncovered) deck / patio
- Covered deck
- Stone / brick / concrete patio

3. Do you have an attached garage?

- Yes No

4. Is the attached garage heated?

- Yes No

INTERIOR

5. Does your home contain any of the following?

- Solar panels
- Sauna
- Secondary suite
- Walk out basement
- Theatre/media room
- Indoor hot tub
- Outdoor hot tub
- Central air conditioning
- Other _____

6. Indicate number of and type of fireplace:

Gas	#	Built-In	#	Free Standing
Electric		<input type="checkbox"/>		<input type="checkbox"/>
Wood/Pellet		<input type="checkbox"/>	1	<input checked="" type="checkbox"/>

7. Which best describes the kitchen cabinets:

- | | | |
|--|--------------------------------|---------------------------------|
| <input checked="" type="checkbox"/> Hardwood (eg Oak, Maple) | <input type="checkbox"/> Solid | <input type="checkbox"/> Veneer |
| <input type="checkbox"/> Melamine (white) | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Other _____ | <input type="checkbox"/> | <input type="checkbox"/> |

8. Which best describes the kitchen countertops:

- Other _____
- Granite, marble or similar (usually has no visible seams)
- Laminate / arborite or similar (usually has visible seams)

9. Indicate number of plumbing fixtures:

Description	Main Floor #	Upper Floor #	Bmt/Lower #
Kitchen Sink	1		
2pc bath (sink & toilet)			
3pc bath (sink, toilet, tub or shower)	2		
4pc bath (sink, toilet, tub/shower combo)			
4pc bath (sink, toilet, tub, separate shower stall)			
5pc bath (double sink, toilet, tub, shower stall)			
Bar Sink			
Laundry Sink			

10. Areas with in-floor heating (check all that apply):

- Main floor
- Upper floor
- Basement
- Bathrooms only
- Garage
- Other _____

11. Describe the flooring materials (excluding the basement):

Flooring Type	Approx. % of Coverage
Carpet	
Linoleum	30
Hardwood	65
Ceramic Stone / Tile	5
Laminate	
Vinyl Plank	
Other	
Total = 100%	100%

12. Describe the basement development (total percent of area must = 100%):

Room	# of Rooms	% of Area	Flooring (eg. carpet/laminate)	Walls (eg. paneling/drywall)
Developed				
Undeveloped		100		

RENOVATIONS / UPGRADES

13. For each category, if renovated, indicate the year renovated. Add comments for further clarification.

Category	Year Reno'd	%Reno'd	Additional Comments
Windows			
Flooring	2010	65	Replaced carpet with hardwood
Bathrooms			
Interior paint			
Exterior finish			
Interior Doors			
Exterior Doors			
Trim (ex: baseboards, window and door moulding)			
Electrical upgrades (ex: fixtures, panel/wiring)			

14. Other Renovations. Indicate original or year renovated. Add comments for further clarification.

Category	Year Reno'd	Additional Comments
Roof covering		
Kitchen cabinets		
Kitchen counters		
Furnace / boiler		
Hot water heater		

15. Please describe each addition. Add comments for further clarification.

Structural Addition	Year Built	Sq.ft.	Dimensions	Additional Comments
1.				
2.				
3.				

16. Are there structural issues with the property? Please describe. (e.g. horizontal foundation cracks, flooding issues)

LAND USE

17. Use of Land: (Check all that apply)

- Residential
- Commercial
- Farm

18. If Farm was selected as a land use, please provide a breakdown of agricultural products that were raised, produced and sold over the last year at the property indicated on this survey.

Agricultural Products (be specific)	Sold (\$ Amount)	Date Sold (approximate)
1. Cattle	14000	Mar / 05 / 2020
2.		
3.		

19. Please provide the following information if this property was leased for farming operations. (farming operations conducted by someone other than yourself)

Lessor Name _____
 Lessor Phone Number _____
 Nature of Farming Activity _____

OUTBUILDINGS

20. Please complete the following table for any additional buildings on the property (e.g. detached garage, shop, barn).

	Building #1	Building #2	Building #3	Building #4	Building #5
Building Type	Shed				
Estimated Year Built	1993				
Estimated Size (sq. ft.)	160				
Estimated Height (ft.)	8				
Heat Type	None				
Concrete Floor (Y/N)	N				
Electrical (Y/N)	N				
Mezzanine Area (Y/N)	N				

21. What is the percentage breakdown of use for the outbuildings described above?

Use of Building	Building #1	Building #2	Building #3	Building #4	Building #5
Personal					
Commercial					
Farm	100				
Total Percentage = 100%	100%	0%	0%	0%	0%

22. Please provide any further comments regarding the additional buildings on your property:

23. All the information provided is true and accurate to the best of my knowledge.

Signature _____ Date _____

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RFI Response Types

Request For Informa...	Report	Dates		Sale's Information			Vendor Name	Purchser Name
Created Date	Response Method	Filled In Online	Received	Certificate Of Title	Sale Date	Sale Price		
09-05-2017	Filled in on WEB	10-11-2017						

- Rate payers can phone in and report “no changes” or done without filling out the full RFI. This option is usually used for 2nd reinspection cycle properties - after the full RFI form survey has been used.

Step 3 – RFI Info

- Work through the information on the RFI.
- Correct and change information that need to be updated. ie. Kitchen, bathrooms, fireplaces, air conditioning, basement development, etc.



Residential Details

As of: 03/03/2023

Roll: 7360008003 Legal: 0125921 360 8 NE-25-52-23-4 Econ. Zone: Sherwood Park Address: 318 FOXBORO CIRCLE	Building #: 210054786 004-04-09 Built: 2002 Life: 65 Renovated: 2010 CDU: Average Effective: 2002 Residence
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Classification	Year Built	Dimensions (Ft)	Area Adj. (Ft2)	Area (Ft2)	Rate / Area	Constant	Adj. %	Total
004-04-00 1 Storey & Basement	2002	0.0 x 0.0	+ 933.0	= 933	x 115.48	52,170	x	159,913
004-04-13 1 Storey Upper	2002	0.0 x 0.0	+ 927.0	= 927	x 74.60	13,220	x	82,374
004-04-18 1 Storey Cantilever	2002	0.0 x 0.0	+ 30.0	= 30	x 102.56	0	x	3,080
002-04-16 Open Veranda	2002	0.0 x 0.0	+ 40.0	= 40	x 44.87	2,010	x 50 % =	1,904

Building Areas	Total Floor: 1,890 Ft2	Int. Finish: 1,890 Ft2	Structure Total: 247,271
	Heat: 1,890 Ft2	Roof: 1,003 Ft2	Quality Adjustment (103%): 254,689
	Basement: 933 Ft2	Window: 227 Ft2	

Category	Detail	Quality	Area (%)	Quantity	Rate	Constant	Market Adj.	Total
120 Room Counts	14 Bedrooms-Upper	4		4				
130 Heat	1 Forced Air	4	100	1,889.94 ft2	5.48			10,359
150 Plumbing Bsmt.	8 Full Bath	4		1	4,200			4,200
152 Plumbing Main	1 Kitchen Sink	4		1	1,400			1,400
152 Plumbing Main	9 1/2 Bath	4		1	2,800			2,800
153 Plumbing Upper	10 1/2 Bath/Shower	4		1	4,200			4,200
153 Plumbing Upper	6 Whirlpool	4		1	2,800			2,800
153 Plumbing Upper	8 Full Bath	4		1	4,200			4,200
170 Fireplace Bsmt.	5 Natural Gas	4		1	5,900			5,900
172 Fireplace Main	5 Natural Gas	4		1	5,900			5,900
181 Decks/Patios Second	1 Ground Level	4		320 ft2	11.33		75%	2,720
189 Bsmt Finish (All - %)	2 Rooms	4	60	559.78 ft2	19.51	2,450	50%	6,686
								Variation Total: 51,165

Breakdown [7360008003] Quality Adjustment			
Model: 4 - Residence			
Building #: 210054786		Floor Area: 1,890 Ft2	
Name	Quantity	Description	
▶ Ext. Wall Finish	0.0	100% Vinyl / Alum SFE / Aspaht Rf	
Windows	1.0	Vinyl + Mbars	
Doors	0.0	metal,0sw / Col Int Drs / Sgl Gl's Rear	
Design	0.0	Gable, 4 peaks, 2 jogs, rear dining nook	
Construction	0.0	Silent Floor	
Floor Finish	1.0	50% rough Carpet, 30% HdWd, 20% C. Tile	
Int. Wall Finish	0.0	soft corners, Arch Int Drs	
Ceiling Finish	0.0	Stipple, 8' ceiling height's	
Baseboards	0.0	2" Pnt'd Wd BB's, no headers	
Cabinets	1.0	R.Oak cab, Arb Ct's, Corner Pantry, Eabr	
Electrical	0.0	Track, Hanging, Globe	
Extra Features	0.0	Phone Desk	
Stairs	0.0	1/2 Wall, Capped, Wd Railing	
Walk Out Basement	0.0	no wob (tankless HWT)	
Miscellaneous	1.0	1890 sf, large 4-4-9	
		104%	



Step 3 (continued)

- Update the Effective Age chart

Calculation Of Effective Age [7006033000]

Year Renovated	Starting Effective Year
2017	1961
2012	1960
2010	1957

Completed Residential component percentage << Renovations >>
<<Range from -100% (subtract years) to 100% (add years) >>

Name	Updated %	Completion	Percent of Base Rate
Site/Excavation		0.00	2.00
Foundation		0.00	11.00
Base Floor		0.00	6.00
Base Ext. Wall		0.00	8.00
Base Roof		0.00	8.00
Roof Finish	100%	2.00	2.00
Soffits & Eavestrough		0.00	1.00
Concrete Slab		0.00	4.00
Windows	100%	6.00	6.00
Exterior Doors	100%	3.00	3.00
Stairs		0.00	1.00
Exterior Finish		0.00	4.00
Interior Finish	50%	2.50	5.00
Interior Paint	50%	1.00	2.00
Interior Doors	100%	4.00	4.00
Cabinets	100%	6.00	6.00
Trim	100%	1.00	1.00
Floor Finish	100%	5.00	5.00
Electrical	50%	3.00	6.00
Plumbing		0.00	10.00
Heating		0.00	5.00

Effective Age for Renovations Only: 1980 33.5%

<< Additions >>

Year Constructed	% of Total Area

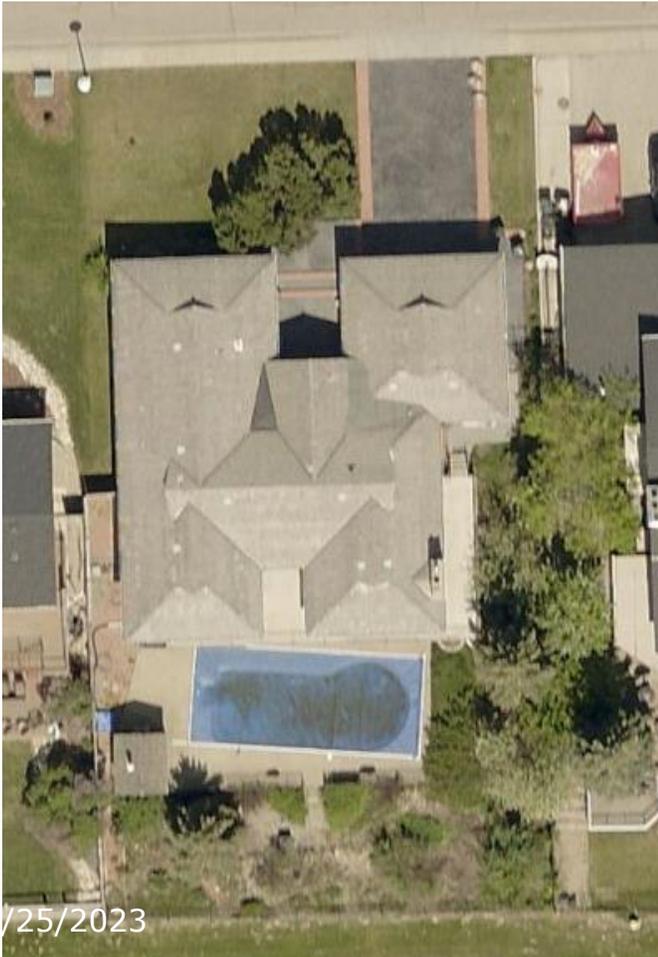
Effective Age for Additions Only:

New Effective Age: 1980

Prog. % 100%
 Building Ages
 Built: 1956 Renovated: 2017
 Effective 1980
 Depreciation

Step 4 – Aerial Imagery

- Review the property from aerial views
 - Use Aerial Imagery to discover changes to property over time



2017:

- Small Pool Shed
- Swimming Pool with surrounding Pad
- Large part of backyard has minimal maintenance (atypical for this neighborhood)

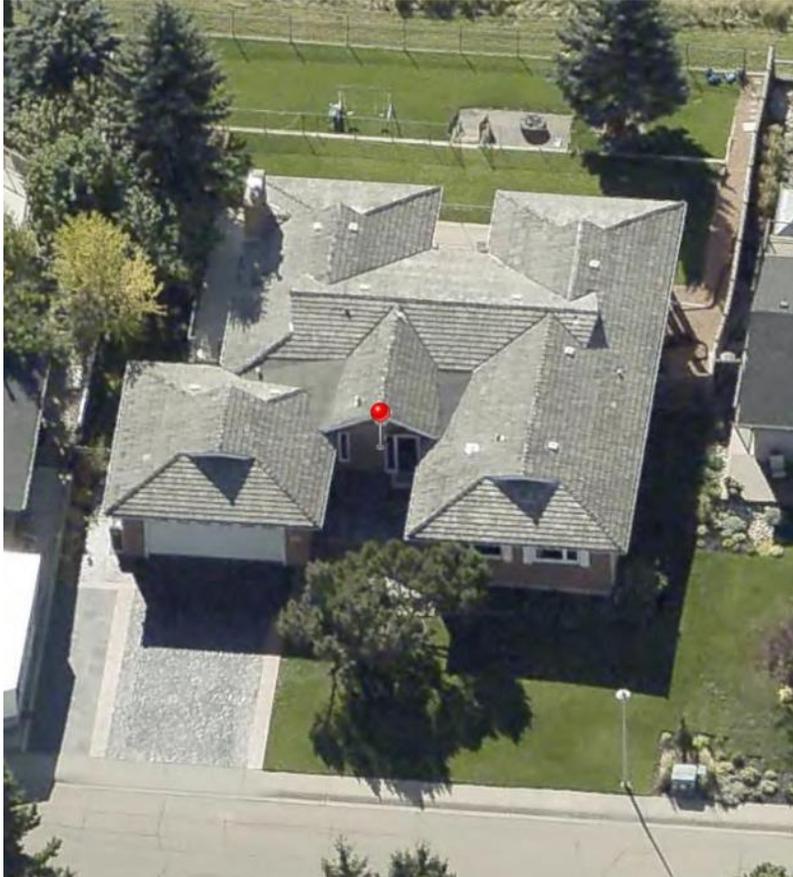


2021:

- Pool Shed & Swimming Pool Removed (Pool filled in completely)
- Landscaping occurred:
 - Grass Added
 - Retaining Wall Added
 - Cleaned up backyard.

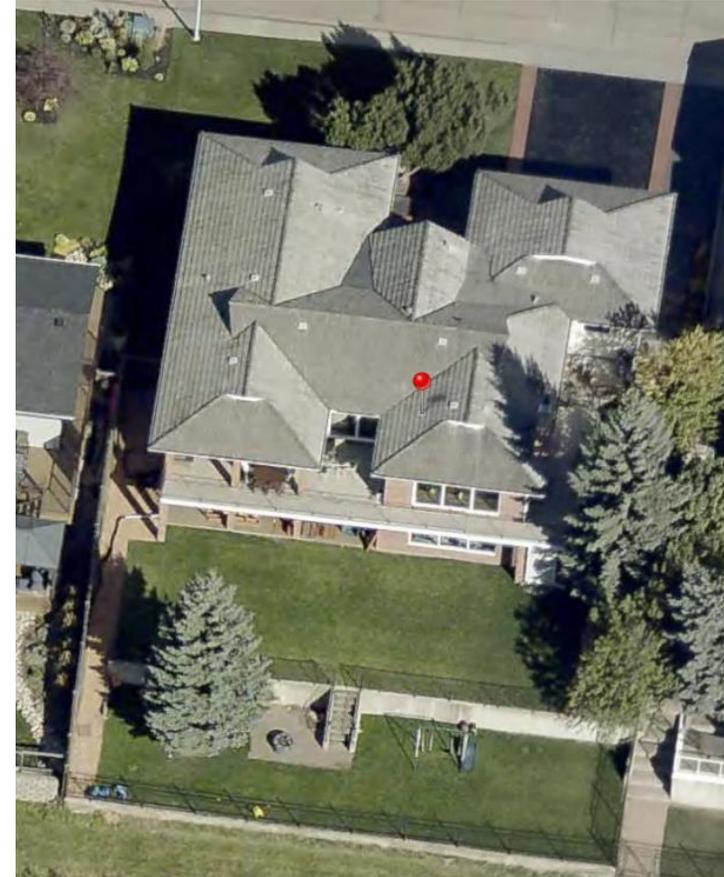
Step 4 – Aerial Imagery (continued)

- Review the property from aerial views
 - Use oblique images which are good for measuring & confirming structure type



Front angle:

- Confirm improvement details (particularly when google street view is outdated or doesn't exist)
- Confirm the Roof Design, # of Peaks, Jogs, etc.



Rear angle:

- Measure Rear Deck
- Measure a portion of the Rear deck as an open veranda.
- Measure the patio beneath the rear deck.
- Confirmed Full Walkout

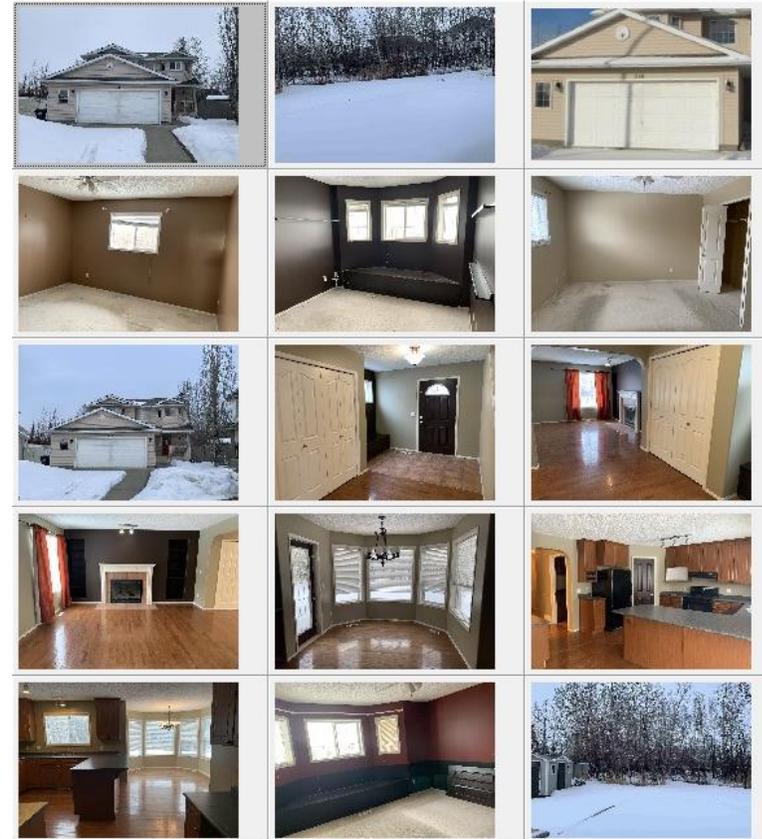
Step 5 – Multiple Listing Service (MLS)

Open MLS data

- Determine whether there is renovation information that can be used to further update the effective age chart / reviewing & collecting photos.

Listings RAE Details

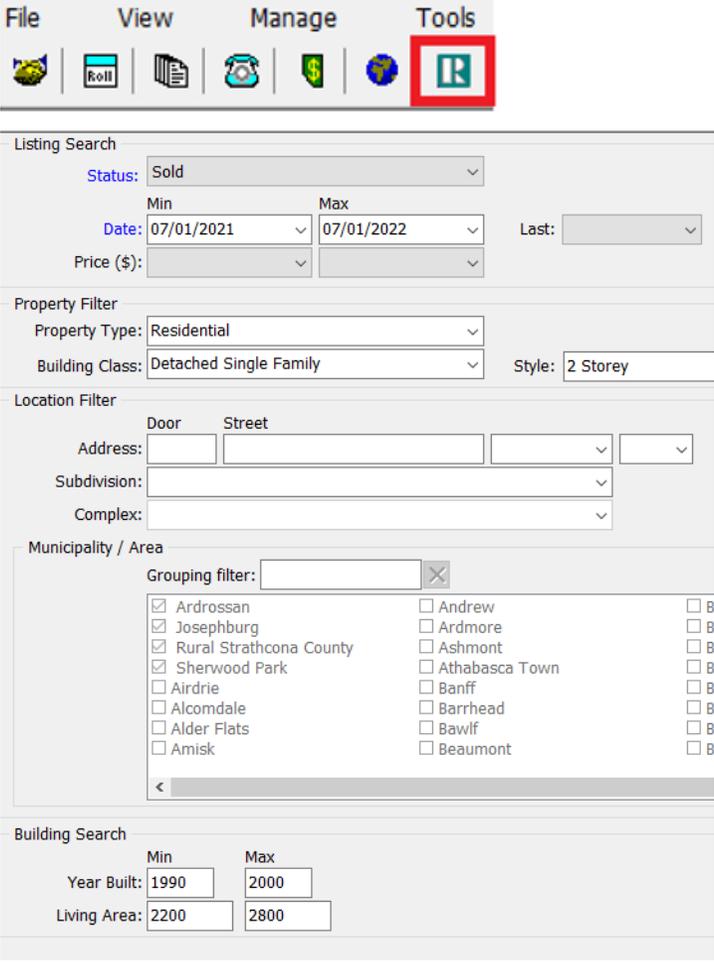
Residential	Closed	Listed Price: \$ 385,900
	RAE Roll: 7360008003	Lin: 0029122851
	Address: 318 FOXBORO Circle Sherwood Park	MLS: E4190712
	Legal: Legal Plan: 125921, Legal Block: 360	Listed Date: 2020-03-09
	Complex:	Sold Price: \$ 382,000
	Subdivision: Foxboro	Sold Date: 2020-03-17
	Zoning: Zone 25	
	Building Class: Detached Single Family	
<p>Welcome to Foxboro!! This 4 bedroom home is spacious and hosts a gas fireplace in the living room, main floor laundry, and an oversized garage. It also has a finished basement, and backs onto walking trails. The home does need some work and some TLC, but has a great layout waiting for your personal touch!</p>		
Building		
Year Built: 2002		
Style: 2 Storey		Levels: 3
Area: 168.0 m ²		1,808 ft ²
Construction: Wood, Vinyl		
Roof: Asphalt Shingles		
Exterior: See Remarks		
Features: See Remarks		
Parking: Double Garage Detached, Over Sized		
Interior		
Bedrooms: <input type="text" value="4"/> Baths: 1 Pc <input type="text" value=""/> 2 Pc <input type="text" value="1"/> 3 Pc <input type="text" value=""/> 4 Pc <input type="text" value="3"/>		
Rooms: LivingRoom, DiningRoom, Kitchen		
Flooring: Carpet, Ceramic Tile, Hardwood		
Heating: Forced Air-1, Natural Gas		
Basement: Full Fully Finished		
Fireplace: <input type="text" value=""/>		
Goods Included: See Remarks		



Realtor Listings – Comparable Search

- Click on the  button on CAMA lot toolbar
- Identify parameters. First select the Municipality/Area you are reviewing, then other filters.
- Receive a list of properties that match your criteria. MLS can be reviewed for each property.

Select	Roll		MLS ID	Price	Date		Status
	MLS	CAMALot		List	Listed	Updated	
<input checked="" type="checkbox"/>	10178734		E4334397	\$ 699,000	2023-04-06		Active
<input checked="" type="checkbox"/>			E4334432	\$ 1,049,000	2023-04-06		Active
<input checked="" type="checkbox"/>			E4333870	\$ 585,000	2023-04-03		Active
<input checked="" type="checkbox"/>	9959339		E4333408	\$ 550,000	2023-03-30		Active



The screenshot shows the software interface with a menu bar (File, View, Manage, Tools) and a toolbar. The 'Tools' menu is open, highlighting the Realtor icon. Below the menu, there are several filter sections:

- Listing Search:** Status: Sold; Date: Min 07/01/2021, Max 07/01/2022; Price (\$):
- Property Filter:** Property Type: Residential; Building Class: Detached Single Family; Style: 2 Storey
- Location Filter:** Address, Subdivision, Complex
- Municipality / Area:** Grouping filter: [X]; List of municipalities with checkboxes: Ardrossan, Josephsburg, Rural Strathcona County, Sherwood Park, Airdrie, Alcomdale, Alder Flats, Amisk, Andrew, Ardmore, Ashmont, Athabasca Town, Banff, Barrhead, Bawlf, Beaumont.
- Building Search:** Year Built: Min 1990, Max 2000; Living Area: Min 2200, Max 2800

Step 6 – Google Street View

- We view the parcel on Google Maps using the Street View



- Landscaping.
- Renovations
- New front-view for 'picture' of house.

- Not always possible for Rural.

Step 7 – Plans & Permits

- Review our Planning & Development software (POSSE or otherwise) for Permits, Plans and Drawings.
 - Good to check in 2 scenarios:
 1. An owner who is not aware of renovation dates:

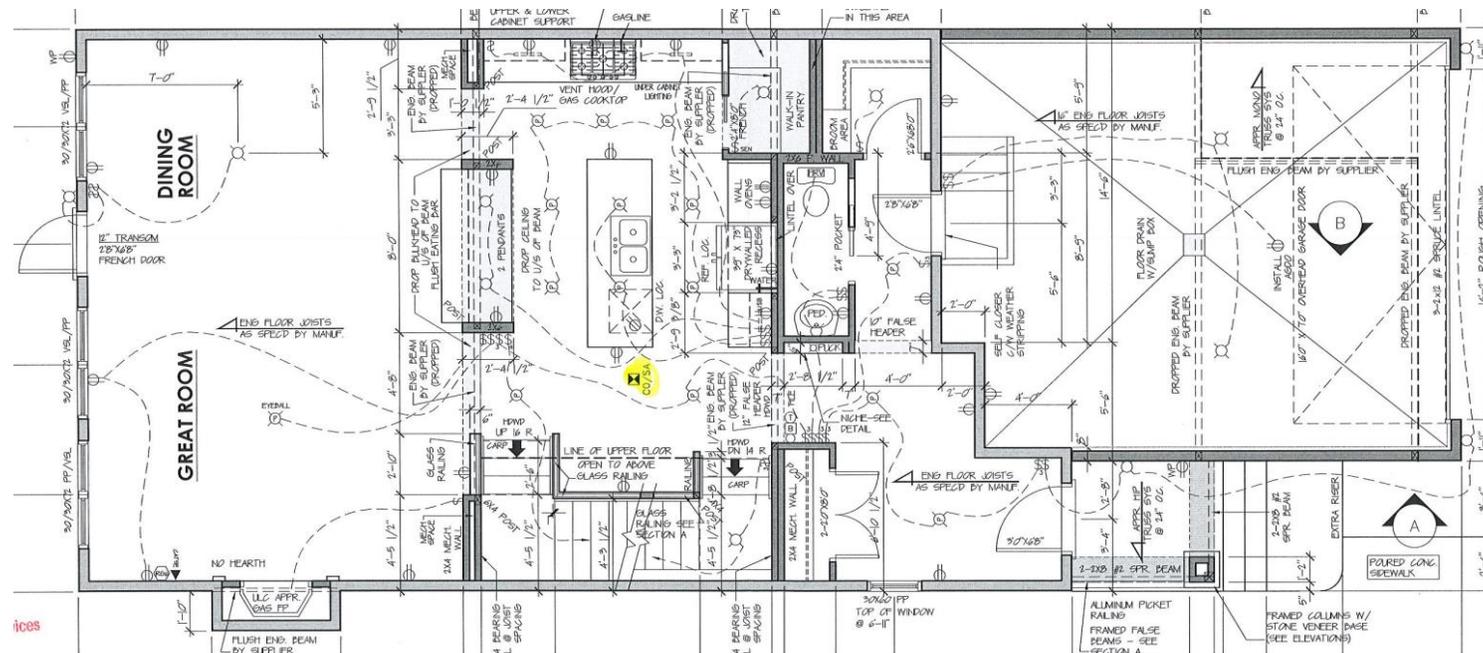
▶	2017-0669-B	To Install a Wood Burning Fireplace and interior renovations	Jul 13, 2017
▶	2017-0857-G	Gas line to fireplace and range	Jul 25, 2017
▶	2017-1312-E	Rewire kitchen, add potlights, upgrade main service, meter socket and mast	Jul 21, 2017

- Effective Age (Electrical Renovation to Kitchen)
- RQA (Pot lights)
- Variations (+Metal B/I Fireplace)
 - » Possibly a secondary gas fireplace as well, further review of permit details required.

Step 7 - continued

2. Recently Built Homes, with permits containing plans and drawings.

	2018-0475-B	New Single Detached Dwelling	May 30, 2018
	2018-0370-DP	Single Dwelling with Attached Garage	May 29, 2018



Step 8 – Site Improvements

- We review site improvements for positive or negative features that may have an impact on the landscaping market land influence.
 - Strathcona County keeps track of site improvements in the features tab.

Building #: 210054786		MQS: 004-04-09	
Header Structures Variations Features Narratives Inspections GIS Exceptions			
Show Features			
<input checked="" type="radio"/> All <input type="radio"/> Active <input type="radio"/> Inactive			
<input type="checkbox"/> Driveway - Dirt	<input type="checkbox"/> Landscaping - Low Maintenance		
<input type="checkbox"/> Driveway - Gravel	<input type="checkbox"/> Landscaping - Overgrown Trees		
<input checked="" type="checkbox"/> Driveway - Concrete	<input type="checkbox"/> Landscaping - Basketball Court		
<input type="checkbox"/> Driveway - Unistone	<input type="checkbox"/> Landscaping - Above Ground Pool		
<input type="checkbox"/> Driveway - Aggregate	<input checked="" type="checkbox"/> Landscaping - Walkway / Sidewalk		
<input type="checkbox"/> Driveway - Poor (Cracks)	<input type="checkbox"/> Landscaping - Incomplete Grading		
<input type="checkbox"/> Driveway - Functional Obs	<input type="checkbox"/> Landscaping - Large Quantity Weeds		
<input type="checkbox"/> Driveway - New / Replaced	<input type="checkbox"/> Landscaping - Pond / Water Feature		
<input type="checkbox"/> Driveway - Stamped Concrete	<input type="checkbox"/> Landscaping - Rock / Stone Feature		
<input type="checkbox"/> Outbuilding - Gazebo	<input type="checkbox"/> Landscaping - Flower Beds / Gardens		
<input type="checkbox"/> Outbuilding - Pergola	<input type="checkbox"/> Landscaping - Underground Sprinklers		
<input checked="" type="checkbox"/> Outbuilding - Small Shed	<input type="checkbox"/> Landscaping - RV Parking Pad / Conc. Pad		
<input type="checkbox"/> Outbuilding - Play Center	<input checked="" type="checkbox"/> Fence - Wood		
<input type="checkbox"/> Outbuilding - Derelict Bldg	<input type="checkbox"/> Fence - Rail		
<input type="checkbox"/> Outbuilding - Canopy / Shelter	<input type="checkbox"/> Fence - Vinyl		
<input type="checkbox"/> Outbuilding - Small Greenhouse	<input type="checkbox"/> Fence - Chain Link		
<input type="checkbox"/> Outbuilding - Corrals / Paddocks	<input type="checkbox"/> Fence - Barbed Wire		
<input type="checkbox"/> Outbuilding - Small Horse Shelter	<input type="checkbox"/> Fence - Wrought Iron		
<input type="checkbox"/> Outbuilding - Outdoor Riding Arena	<input type="checkbox"/> Fence - No Fence / Missing		
<input type="checkbox"/> Outbuilding - Large Structure (minimal value)	<input type="checkbox"/> Fence - Stone / Brick / Masonry		
<input type="checkbox"/> Landscaping - Firepit	<input type="checkbox"/> Trees - Shelter Belt		
<input type="checkbox"/> Landscaping - Curbing	<input type="checkbox"/> Trees - Mature / Transplanted		
<input type="checkbox"/> Landscaping - Grass Only	<input checked="" type="checkbox"/> Gates - Wood		
<input type="checkbox"/> Landscaping - Nil Trees	<input type="checkbox"/> Gates - Rail		
<input type="checkbox"/> Landscaping - Cluttered	<input type="checkbox"/> Gates - Masonry		
<input type="checkbox"/> Landscaping - Golf Green	<input checked="" type="checkbox"/> Gates - Chainlink		
<input type="checkbox"/> Landscaping - Astro Turf	<input type="checkbox"/> Gates - Wrought Iron		
<input type="checkbox"/> Landscaping - Garden Plot			
<input type="checkbox"/> Landscaping - Hockey Rink			
<input type="checkbox"/> Landscaping - Tennis Court			
<input type="checkbox"/> Landscaping - Small Bridge			
<input type="checkbox"/> Landscaping - Grotto / Cave			
<input type="checkbox"/> Landscaping - Retention Walls			

Residential Features:

- A checklist of common site improvements
 - Driveway type
 - Small Outbuildings
 - Landscaping
 - Fence / Gates
 - Negative Factors (Derelict Buildings, Cluttered, Missing Fence)

Step 9 – Market Land (Micro)

- Some market land influences are best reviewed while inspecting individual properties (micro). Other market land influences are best reviewed from a 'neighborhood-perspective' (macro).
- Micro-Level review:
 - Landscaping, Topography, Unsightly Neighbor, Driveway Obstructions.
 - These influences rely on fine details that are much easier seen while individually reviewing the property itself from Eagleview or Google Street View.
- Later, we conduct Macro-Level review of neighborhoods to ensure consistency, using GIS (To be reviewed in Step 13).

Step 10 – Tax Coding

- We confirm the use of the land as one or more of the following:
 - Residential
 - Commercial
 - Farm
- If farmed, we also ask:
 - The type of farming, sold \$ amount, and the date sold.
 - Whether the property is farmed by the owner, or leased to an external farmer.
- We ask the owner to indicate a breakdown of each outbuilding's usage into Residential, Farming, or Commercial (or split of 2 or more).
 - Owners will often provide additional information regarding how they use their outbuildings.
- A Rural RFI is considered a Land Use Declaration Form.

Step 11 – Previous Inspection Data

- Even without an RFI, we can still do a full review.
- We always review existing data to ensure consistency with current best practices.
- It is important to review even without new data:
 - Model, Quality and Structure (Quality parameters might have changed – The size of a quality 4 may have been increased/decreased since last reviewed)
 - RQA (Assessors make decisions with the best information they have at the time. Perhaps new information has come out revealing something we thought would have major value implications, does not impact value – and vice versa)
 - Effective Age (Decisions can change over how to code renovations, and what weight to put on certain renovations within each category)
 - Variations (Perhaps something wasn't entered as a variation back in the day, but now is)

Step 12 – Following Up

- **The RFI is confusing, or results in major assessment increases:**
 - The RFI asks for a property owner's phone number and email as contact options.
 - A follow up with the owner occurs when we notice a major discrepancy or change, resulting in a significant assessment & tax change (Such as the removal of farm).
 - Owners have expressed gratitude over being notified of changes, and being given a chance to clarify their statements. Assessors also avoid increased complaint volume in the upcoming year, as owners are not surprised by the change.
- **No RFI returned.**
 - If the RFI is not completed, our cover letter states an on-site inspection of the property may be required.
 - On-site inspections are ONLY done when all other avenues (Eagleview, MLS, Plans, Previous Inspection Data, etc.) are proven insufficient to ensure equitable treatment.
 - Following our second round of RFI's, we are experiencing less need for on-site inspections, even if people have not responded to the RFI's.
 - On April 6th, out of 3,500 urban inspections, only 15 (0.004%) require on-site inspections.

Step 13 – GIS (Market Land - Macro)

- Review GIS for inconsistencies in market land influences
- Artery, Lake Influence, Commercial Proximity, etc.
- The image to the right shows Artery-Split influences along with traffic count volume from various years.



GIS Roadmap (Existing)

- Current features in Strathcona County's GIS:
 - Creating a map of properties to visit for inspections
 - Visual review of workgroup(s) progress.
 - Market Land Influences
 - Creative ways to combine layers.
 - Utility Box Market Land Influence & Layer indicating Utility Box locations.
 - Fire Hydrant Market Land Influence & Layer indicating Fire Hydrant locations.
 - Artery & Traffic Count
 - Mutually exclusive market land influences (Positive & Negative landscaping)
 - Mutually inclusive market land influences (Poor Landscaping & Unsightly Neighbor)
 - Improvement Layer (shows MQS of improvements)
 - Residential Sales Layer (good for reviewing ASR's in an area or along an influence that we are reviewing)

GIS Roadmap (Future)

- Future GIS Projects:
 - Creating an automatic buffer zone that calculates distance to improvements along an Arterial Road/railroad/other positive/negative externalities.
 - Applying a Farmland Layer indicating soil type, pasture vs arable, etc.

Outcomes

- Empowers & Engages Property Owners, increasing response rates.
 - Strathcona County consistently receives a 75%-80% response rate.
 - Send out RFI (online, phone in, mail in with pre-stamp envelopes, 60 days to respond) - then send reminder letters (with exact same options).
 - Response rate depends on many factors, some of which are beyond our control. But we have maximized response using our processes.
 - Property owners have a better understanding of the components that affect assessed value.
 - Property owners can complete the survey at their own leisure and pace.
 - Fair and equal treatment of all urban, rural and condo property owners. They are asked the same questions in the same way as others in their segment.
- Privacy and Safety Concerns
 - Gated properties, “No Trespassing” signs, Covid-19 concerns, and a general desire by owners for privacy.
 - Owners feel safer without unknown people observing their properties.

Outcomes, continued

- Minimizes staff safety related issues
 - Road conditions, dogs, harassment.
- Lower cost to the municipality
 - We have found printing and mailing is less expensive than gas mileage
- Data accuracy has improved significantly.
 - We are collecting greater quantity and quality of information related to effective age, RQA, and other interior details than ever before.
- We now have a paper trail of entered data, rather than relying on non-traceable conversations between the property owner and assessor of the time.



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The respected opinions expressed are the considered and subjective views of the trainers/presenters.

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CATALIS



ADVANCING GOVERNMENT. ENGAGING CITIZENS.

Building the RFI

Description		Show Descr. On Report	Report Title	Dates		Expired	RFI Type
				Created	Freezed		
▶	Test 12	<input checked="" type="checkbox"/>	Residential Request for Information	02-20-2019	02-21-2019	<input checked="" type="checkbox"/>	Residential
	Beck Estates	<input checked="" type="checkbox"/>	Residential Request for Information	09-10-2018	09-21-2018	<input checked="" type="checkbox"/>	Residential
	Josephburg	<input checked="" type="checkbox"/>	Residential Request for Information	09-10-2018	09-20-2018	<input checked="" type="checkbox"/>	Residential
	Lakeland	<input checked="" type="checkbox"/>	Residential Request for Information	09-10-2018	09-18-2018	<input checked="" type="checkbox"/>	Residential
	Nottingham	<input checked="" type="checkbox"/>	Residential Request for Information	09-07-2018	09-18-2018	<input checked="" type="checkbox"/>	Residential

Active	Sort Key	Group	Description	Show					Lines Before Question	Details
				Col.1	Col.2	Col.3	Col.4	Col.5		
<input checked="" type="checkbox"/>	10	GENERAL	Owner Name:	<input checked="" type="checkbox"/>	3					
<input checked="" type="checkbox"/>	30	GENERAL	Property Address:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3	
<input checked="" type="checkbox"/>	50	GENERAL	Daytime Phone Number: _____	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3	
<input checked="" type="checkbox"/>	60	GENERAL	Email Address:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3	
<input checked="" type="checkbox"/>	70	EXTERIOR	#. Describe the roofing material:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	⊞ 5
<input checked="" type="checkbox"/>	80	EXTERIOR	#. Which of the following does the property have?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	⊞ 8
<input checked="" type="checkbox"/>	90	EXTERIOR	#. Describe other buildings on property:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5	⊞ 6
<input checked="" type="checkbox"/>	120	INTERIOR	#. Which best describes the kitchen countertops:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10	⊞ 5
<input checked="" type="checkbox"/>	110	INTERIOR	#. Which best describes the kitchen cabinets:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2	⊞ 4
<input checked="" type="checkbox"/>	140	INTERIOR	#. Do you have in-floor heating?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	
<input checked="" type="checkbox"/>	140	INTERIOR	#. Areas with in-floor heating (check all that apply):	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	⊞ 6
<input checked="" type="checkbox"/>	100	INTERIOR	#. Does your home contain any of the following?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2	⊞ 26
<input checked="" type="checkbox"/>	150	INTERIOR	#. Describe the flooring materials (excluding the basement):	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	⊞ 8
<input checked="" type="checkbox"/>	160	INTERIOR	#. Indicate number of plumbing fixtures:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	⊞ 9
<input checked="" type="checkbox"/>	170	INTERIOR	#. Describe the basement development (total percent of area must = 100	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5	⊞ 10
<input checked="" type="checkbox"/>	130	INTERIOR	#. Indicate number of and type of fireplace:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	5	⊞ 3
<input checked="" type="checkbox"/>	180	RENOVATIONS / UPGRAC	#. For each category, if renovated, indicate the year renovated. Add com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	6	⊞ 25
<input checked="" type="checkbox"/>	190	RENOVATIONS / UPGRAC	#. Please describe each addition. Add comments for further clarification.	<input checked="" type="checkbox"/>	5	⊞ 3				
<input checked="" type="checkbox"/>	200	RENOVATIONS / UPGRAC	#. Are there structural issues with the property? Please describe. (e.g. h	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6	

Question Layout

Owner Name:

- Ability to add / create new RFI's
- Can use previous RFI's as starting point
- Add / remove questions by checking active box
- Questions with options can be customized
- You can sort questions by sort key and adjust spacing
- As you make changes click on report to view
- Change the description to desired name of survey

Building the RFI

Groups: INTERIOR

ID	Sort Key	Description	Details Title	Column 1 Title	Column 1 Type	Column 2 Title	Column 2 Type	Column 3 Title	Column 3 Type	Column 4 Title	Column 4 Type	Column 5 Title	Column 5 Type	Show On Report	Show Border	Full Page	Answer Required	Question Yes	Question No
10	10	#. Which best describes the kitchen countertops:			RG									<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
21	20	#. Which best describes the kitchen cabinets:			CB	Solid	RG	Veneer	RG					<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
50	30	#. Do you have a fireplace or stove?		Yes	RG	No	RG							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		11
11	31	#. Indicate the type and location of fireplaces / stoves:	Main		CB	Upper	CB	Bsmt/Lower	CB					<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
51	40	#. Do you have in-floor heating?		Yes	RG	No	RG							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		22
22	41	#. Areas with in-floor heating (check all that apply):			CB									<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
12	50	#. Does your home contain any of the following?			CB									<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
13	60	#. Describe the flooring materials (excluding the basement):	Flooring Type	Approx. % of	NO									<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
14	70	#. Indicate number of plumbing fixtures:	Description	Main	NO	Upper	NO	Bsmt/	NO					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
15	80	#. Describe the basement development (total percent of area must = 100	Room	# of Rooms	NO	% of Area	TX	Flooring	TX	Walls	TX	Additional Cc	TX	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
16	90	#. Indicate if the basement / lower level contains any of the following con			CB									<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
71	110	#. Do you have a fireplace or stove?		Yes	RG	No	RG							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		61
61	111	#. Indicate the number and type of fireplace(s) on each level:	Main		NO	Upper	NO	Bsmt/Lower	NO					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Sort Key	Description
10	Laminate / arborite or similar (usually has visible seams) ...
20	Granite, marble or similar (usually has no visible seams) ...
30	Laminate / arborite or similar ...
40	Granite, marble, quartz, or similar ...
50	Other ...

Question Layout

#. Which best describes the kitchen countertops:

- Laminate / arborite or similar (usually has visible seams)
- Granite, marble or similar (usually has no visible seams)
- Laminate / arborite or similar
- Granite, marble, quartz, or similar
- Other

- If you chose to start an RFI from scratch, this screen displays the available questions by category
- A view of the question is displayed at the bottom of the screen

Building the RFI

Main | General Settings | Default Asmt Codes | Property Module | Farmland Module | Market Land Module | Sales Module | Reports | Included Municipalities | Attachments | Asmt Notices | RFI | Web Access

RFI Settings

Web Link:

 Set RFI Color:

 Municipality Logo: 

Disclaimer

Personal information is collected under the authority of section 33 (a) and (c) of the Freedom of Information and Protection of Privacy Act and will be used for the purpose of determining a fair and equitable assessed value of your property. If you have questions regarding the collection, use or disclosure of this information, contact the Assessment and Tax Department at 780-464-8196 or assess@strathcona.ca.

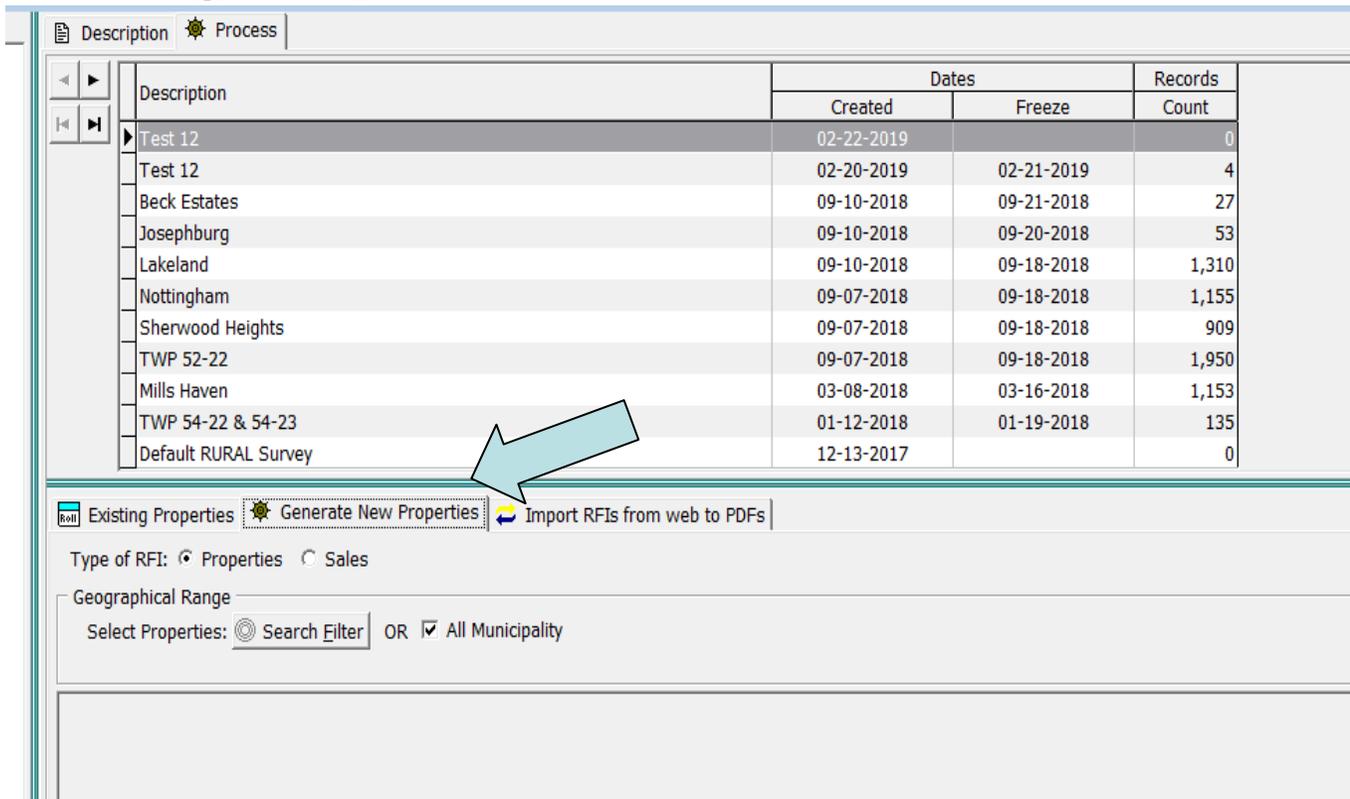
- Can add your FOIP Statement, municipal logo and adjust the color of the text.

Creating List of Properties

- Determine the area or group of properties you want to mail an RFI to.
 - This query will also be used in the mail merge to create the cover letters for the surveys, included in the query is mailing address, property address and owner name.
- Things to consider when creating list:
 - Date of last RFI sent?
 - Do properties with a recent inspection require an RFI?
 - If we recently completed an interior inspection an RFI will not be sent.
 - Do you want progressive properties to receive an RFI?
 - Should new homes receive an RFI?
 - Remove all municipally owned properties
 - Properties with multiple residences

Adding Properties to the RFI

Adding Properties to the RFI



Description	Dates		Records
	Created	Freeze	Count
Test 12	02-22-2019		0
Test 12	02-20-2019	02-21-2019	4
Beck Estates	09-10-2018	09-21-2018	27
Josephburg	09-10-2018	09-20-2018	53
Lakeland	09-10-2018	09-18-2018	1,310
Nottingham	09-07-2018	09-18-2018	1,155
Sherwood Heights	09-07-2018	09-18-2018	909
TWP 52-22	09-07-2018	09-18-2018	1,950
Mills Haven	03-08-2018	03-16-2018	1,153
TWP 54-22 & 54-23	01-12-2018	01-19-2018	135
Default RURAL Survey	12-13-2017		0

Existing Properties Generate New Properties Import RFIs from web to PDFs

Type of RFI: Properties Sales

Geographical Range

Select Properties: OR All Municipality

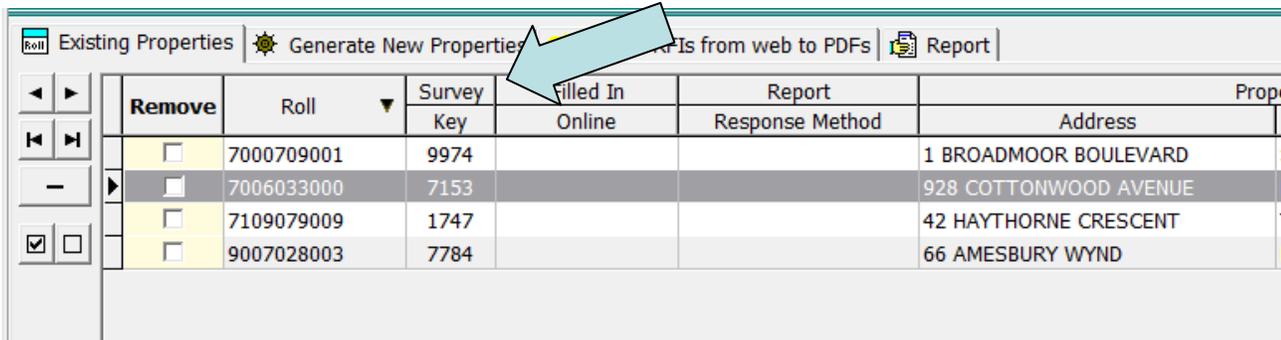
- Add properties by clicking the recently created RFI and click on "generate new properties".
- Here you can search a number of different ways, or select a file to load a specific group of properties
- Once the properties are loaded a survey key will be tagged to each property
- Double click on one of the properties to test the RFI, once in property manger click the survey button



Survey button in property manager

Building the Cover Letter

- Open original file used to add properties to the RFI
- Add Survey key as a column in the spreadsheet
 - Taken from:



Remove	Roll	Survey Key	Filled In	Report Response Method	Address
<input type="checkbox"/>	7000709001	9974			1 BROADMOOR BOULEVARD
<input type="checkbox"/>	7006033000	7153			928 COTTONWOOD AVENUE
<input type="checkbox"/>	7109079009	1747			42 HAYTHORNE CRESCENT
<input type="checkbox"/>	9007028003	7784			66 AMESBURY WYND

- Once added a mail merge can be completed in Microsoft Word

Loading Complete RFI's

- Loading mailed in RFI's
 - Scan the RFI and save by roll number
 - Go to RFI – Mass Insert, select the RFI and file location
 - If there are any errors CAMA lot will highlight in red

RFI Description: Test 12

Load RFI PDFs from: C:\Users\tipton\Desktop\Presentation\Scanned Survey

Validate Data

Roll	File Name	Validation Description
7006033000	C:\Users\tipton\Desktop\Presentation\Scanned Survey\7006033000.pdf	

Loading Complete RFI's

ASSESSMENT REQUEST FOR INFORMATION

The Assessment and Tax Department is conducting a review of properties in order to update and confirm property assessment data. This information is necessary to maintain an accurate assessment value on your property.

Your roll number:

The survey key you received:

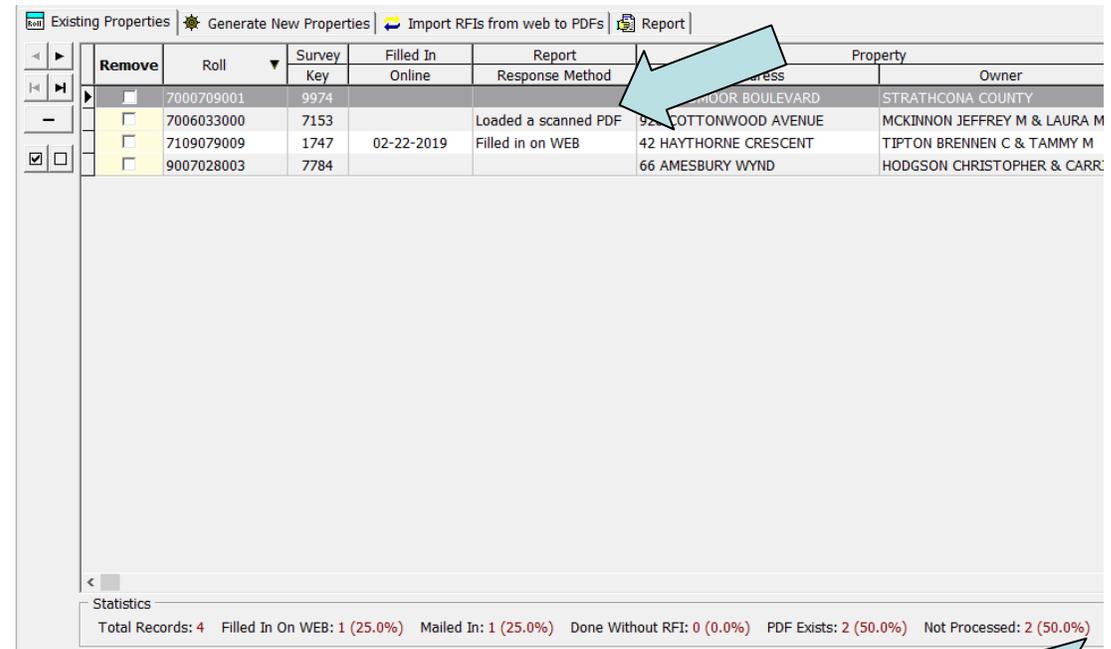
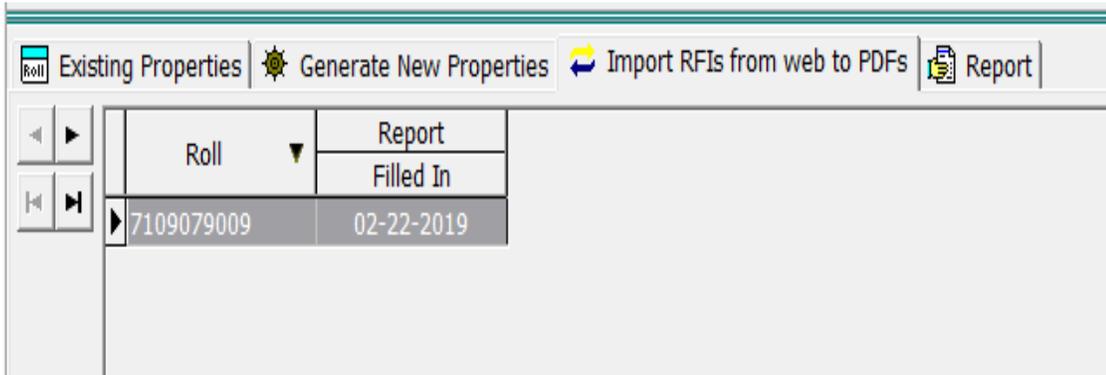
Submit

- Completing online RFI's
 - Go to rfi.camalot.ca
 - Enter roll number and survey key

Loading Complete RFI's

- RFI's filled out online are attached to the property by using the Import RFI's from web function.

- RFI's will now display as Loaded a scanned PDF or Filled in on WEB.



- RFI return stats are displayed at the bottom of the screen.

Creating Work Groups

- Create your work group quick keys and descriptions

Select an operation:

Quick K...	Description	For All Munies	For Municipality
1	Summerwood - Rot	<input checked="" type="checkbox"/>	
2	Regency - Rot	<input checked="" type="checkbox"/>	
3	The Ridge - Rot	<input checked="" type="checkbox"/>	
4	Broadmoor - Rot	<input checked="" type="checkbox"/>	
5	Chelsea Heights - Rot	<input checked="" type="checkbox"/>	
6	51-22 - Rot	<input checked="" type="checkbox"/>	
7	52-23 - Rot	<input checked="" type="checkbox"/>	
8	56-20 & 21 - Rot	<input checked="" type="checkbox"/>	
9	Presentation	<input checked="" type="checkbox"/>	
10	Rotational Area	<input checked="" type="checkbox"/>	
36	Land Use Declaration	<input checked="" type="checkbox"/>	
49	New Residential	<input checked="" type="checkbox"/>	
50	New Residential - Drawn	<input checked="" type="checkbox"/>	
51	New Additions / Reno's	<input checked="" type="checkbox"/>	
52	Future - Res Inspections	<input checked="" type="checkbox"/>	
53	Current - Res Inspection	<input checked="" type="checkbox"/>	
57	2023 - New Res - Prog. Yr.	<input checked="" type="checkbox"/>	
58	2024 - New Res - Prog. Yr.	<input checked="" type="checkbox"/>	
59	Sale Review	<input checked="" type="checkbox"/>	

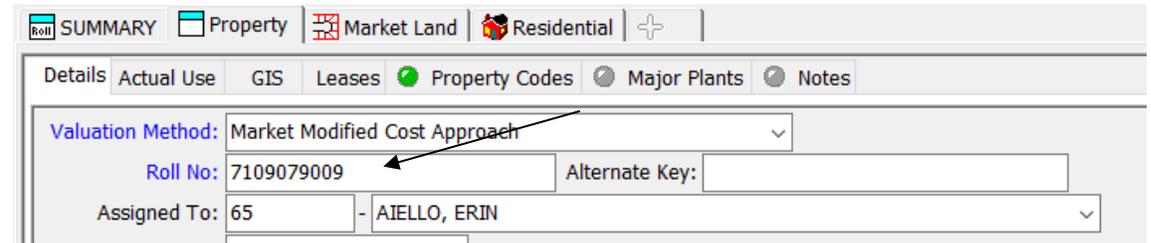
- Add assessors to that work group that will be assigned properties

	For		Work Group		Category
	All Years	Asmt Year	Quick Key	Description	
<input type="checkbox"/>		2023	2	Regency - Rot	Rotationals
<input type="checkbox"/>		2023	3	The Ridge - Rot	Rotationals
<input type="checkbox"/>		2023	4	Broadmoor - Rot	Rotationals
<input type="checkbox"/>		2023	5	Chelsea Heights - Rot	Rotationals
<input type="checkbox"/>		2023	6	51-22 - Rot	Rotationals
<input type="checkbox"/>		2023	7	52-23 - Rot	Rotationals
<input type="checkbox"/>		2023	8	56-20 & 21 - Rot	Rotationals
<input type="checkbox"/>		2023	9	Presentation	Rotationals
<input type="checkbox"/>		2023	10	Rotational Area	Rotationals

Quick Key	Last First Name	Manager	Assigned Records
30	TREMBLAY, Serge	<input type="checkbox"/>	
48	HODGSON, Carrie	<input type="checkbox"/>	
59	TIPTON, BRENNEN	<input checked="" type="checkbox"/>	
65	AIELLO, ERIN	<input type="checkbox"/>	
67	MOORE, Greg	<input type="checkbox"/>	
71	GRAZIANO, Daniel	<input type="checkbox"/>	
N/A	NOT ASSIGNED, Worker	<input type="checkbox"/>	

Creating Work Groups

- You are able to add an assigned assessor to every parcel, displayed under the property tab
- A mass update process is available through Mass Property Update
- Adding this allows work groups to auto assign annual workloads to the assigned assessor without having to add their name to the upload file



The screenshot shows a software interface with a top navigation bar containing tabs for 'SUMMARY', 'Property', 'Market Land', and 'Residential'. Below this is a sub-navigation bar with tabs for 'Details', 'Actual Use', 'GIS', 'Leases', 'Property Codes', 'Major Plants', and 'Notes'. The 'Property Codes' tab is selected. The main content area displays the following information:

- Valuation Method: Market Modified Cost Approach
- Roll No: 7109079009
- Alternate Key: [Empty field]
- Assigned To: 65 - AIELLO, ERIN

An arrow points from the 'Roll No' field to the 'Assigned To' field.

Creating Work Groups

- Using Mass Work Groups Insert or Update, you now load the properties you want to assign to each work group.
- If you want to assign specific assessors, you add "Assigned_to_QK" to you upload file
- If you want CAMAlot to use the assigned assessor for each parcel in CAMAlot, do not add the "Assigned_to_QK" field

Select an operation:

- > Asset
- > Attachments
- > Direct Sales
- > Farmland
- > History
- > Images
- > Income
- > Industrial
- > Inspections
- > Market Adjustments
- > Market Land
- > Marshall & Swift
- > Merlin
- > Narratives
- > Owners
- ▼ Property
 - Lease Transfer
 - Mass Asmt Code Update
 - Mass Codes Update
 - Mass Override Update
 - Mass Property Insert
 - Mass Property Update
- > Request For Information (RFI)
- > Residential
- > Sales
- > Server Operations
- > Special
- > Tax
- ▼ Work Groups
 - Copy / Transfer
 - Mass Work Groups Insert or Update

Mass Work Groups Insert or Update

This Special Operation was created to allow users to mass **INSERT or UPDATE** Work Groups Records.

You have to provide a spreadsheet (or TEXT file) with the following columns:

ROLL or ALTERNATEKEY	<-- required
ASMTYEAR	<-- required (Leave column blank if Work Group is set to "All Years")
WORKGROUP_QK	<-- required

ASSIGNED_TO_QK
PROGRESS_QK
DESCRIPTION
NOTES

The first row of each column of data should have the field header information as specified above.

Once a file is loaded from the "Load File From:" specified, the screen's grid will fill with all the data.

Valid data will be black, invalid data will be red. You can change data as needed on the form.

Once the data is posted and valid, the "Execute" button will be enabled to mass **INSERT or UPDATE** all records. A work groups will be added to the system for every roll number in the file.

Monitoring Work Groups

- Workflows can now be viewed through the dashboard
- Views by assessor or by work group are available
- These views can be further broken down by categories

