

Timeline of implementation of Tyler Technologies' iasWorld for Cook County

Note: Details of data interface between CCAO and BOR are in bold.

2014-2018

On June 30, 2014, the Office of the Chief Procurement Officer ("OCPO") issued an RFP (No. 1490-13787) to implement an integrated property tax and mass appraisal system (IPTS) and secure all related services to reengineer the current state process, automate the future state processes, and prepare Cook County staff for the transition to a new integrated solution. The project referenced the following key stakeholders:

- Bureau of Technology (BOT)
- Board of Review (BOR)
- Assessor's Office
- Clerk's Office
- Treasurer's Office
- In the early summer of 2015, voting members of the key stakeholder agencies, which included BOR, selected and recommended to the County Board Tyler Technologies as the winning proposal. Contract 1490-13787 was approved by the Board of Commissioners on September 9, 2015.
- At the onset, the main agencies participating in the project were BOT, Assessor, Clerk and Treasurer; **BOR decided to proceed with the implementation of their appeals system on the OnBase platform, which meant they put themselves at the periphery of discussions about the new iasWorld system.**
- Tyler met with BOR on October 10, 2017 to review Assessor current state documentation without any Assessor presence; **BOR submitted numerous requests, including direct access to data, reports, database to Tyler.** Only County agency representative in attendance other than BOR staff was Joy Logan of BOT.
 - On October 11, 2017, Tyler logged an issue on the since retired RAID_8.2.19 log, "Scope Creep with BOR is due to the request from client to configure and setup iasWorld for their use in production" (Issue #12)
- Design meeting is held on June 19, 2018 between Tyler, Assessor and BOR with an agenda limited to configuration and design of replacement of ASIQ/AINQ (PRM); **discussion instead includes actual interface to and from BOR, reports, images, PTAB, data and reporting elements that are acquired by BOR** through execution of mainframe jobs and not directly by Assessor.

- Fritz Kaegi takes office as the new Cook County Assessor on 12/3/2018. After the 2018 holidays, members of the new Kaegi Administration assume responsibility for the Assessor portion of the IPTS implementation

2018-2019

Assessor and BOR begin conversations and sharing information that had been shared with the previous administration and Tyler; most is predicated on the file layouts and samples from the mainframe.

- **Assessor, BOR and Tyler meet on April 9, 2019 to go over the iasWorld interface between the Assessor and BOR;** information captured is based on the then current state of the interface between the AS400 mainframe to OnBase, not future state of the interface between iasWorld to OnBase.
- **In August 2019, Assessor sets follow-up meeting directly with BOR to continue discussions on interface.** Discussion also includes Assessor Corrections and Certificates of Correction filings and interfaces between both offices, including how to improve data sharing and **create a direct interface between iasWorld and OnBase.**
- **Assessor Phase 1 of iasWorld go-live date is delayed from December 2019 to December 2020 by Tyler;**
- Assessor is able to negotiate with Tyler to make some functionality available throughout 2020, beginning with the stand-alone implementation of SmartFile Online Appeals in February 2020.

2020

- **BOR reaches out to Assessor in May 2020 to discuss data conversion and status of the project,** mostly inquiring to review sample import file for interface; BOR did not provide file and spec for BOR interface at the time.
- **Assessor reaches out to BOR in June 2020 to follow up on the prospective interface between Assessor and BOR;** BOR subject matter experts begin indicating that “there is more” to BOR requirements than just the certification data transmitted between both offices, as they still rely heavily on the mainframe for a lot of their data.
 - Assessor includes BOT in the discussion, as the mainframe architecture and maintenance via batch jobs and reports are under BOT control. The agencies exchange file layouts, but there is no follow up.
- **Assessor, BOR and BOT meet with Tyler to discuss the potential interface on July 7, 2020;** the interface is once again heavily discussed from the aspect of what BOR needs via the mainframe processing.

- Assessor prepares for their rescheduled iasWorld go-live, now calendared for October 13, 2020.
- **Tyler and Assessor re-engage on the BOR interface on October 16, 2020.** Tyler expresses concern at having to design an output out of iasWorld to meet the required format and business rules of the mainframe, both for import into iasWorld and possible import directly into the AS400.
 - Tyler reviews sample text files as provided by BOT to create the valuation import into iasWorld and prepares a plan that will allow the import but cautions the Assessor that the import will not be “perfect” due to the completely different sequence and file layouts between iasWorld and mainframe.
 - Planning and testing continues from October 2020 to February 2021
 - **BOR import, with data extracted from the mainframe, begins into iasWorld beginning in early March 2021.**
- **Assessor contacts BOR again in November 2020 to discuss the interface,** after discussion with Tyler and in an effort to start brainstorming direct interfaces between both systems, in anticipation of mainframe retirement. **BOR does not respond. Assessor reaches out to BOT.**

2021 (Chicago reassessment year) and 2022

- **On January 26, 2021, Assessor reaches out again to key stakeholders in BOR to begin discussing legacy interface;** Deputy Assessor also reaches out to BOR and requests BOT to set up a discussion between the three offices.
 - Assessor was preparing for Phase 1 assessment go-live, so BOR knew that need for legacy interface was imminent
- **Assessor, BOR and BOT meet briefly in early February 2021, during which BOR tells Assessor, “we don’t have time to discuss right now, come back when we are done with 2020 processing, possibly June.”**
- **Assessor reaches out to BOR in late June of 2021 to set up a meeting to discuss interface;** Assessor indicates that appeals are being worked but warns BOR that *“it’s been extremely difficult to try to fit a round peg into a square hole. I think it’s a great idea for us to start discussing how I can provide data for you guys, since at some point the interface will be eventually shifted between your system and iasWorld. If you can send me data samples and a file layout, that will certainly help.”*
 - Meeting is scheduled between BOR and Assessor. BOR subject matter expert misses the meeting. Meeting is rescheduled with SME. When the rescheduled meeting occurs it is very brief and doesn’t go into details. BOR point person is then out on vacation for 3 weeks.

- **Assessor reaches out to BOR on July 21, 2021 asking again for a meeting between the offices.** Assessor is primarily concerned with certifying values to BOR to allow them to open up for appeals. BOR requests additional functionality related to BOT and not related to Assessor, such as jobs that are executed by BOT in the mainframe to update BOR tables.
 - Assessor advises BOR that we have experience in those tools and offers to help brainstorm additional/alternative solutions.
 - **Brief, contentious meeting is held between Assessor, BOT, and BOR. BOR accuses Assessor of “violating statute” if Assessor did not provide the data “as BOR is accustomed to receiving it through the mainframe”**
- **Assessor, Tyler and BOT begin to test a “legacy interface” export in July 2021** based off of the file layout of BARER06V, with an attempt to completely bypass the AS400 and import the iasWorld directly into mainframe; this would allow for direct import of assessment “header and detail files” for both initial assessment and for assessor certification to BOR.
- **Assessor, BOT and BOR meet on September 14, 2021 to discuss the legacy interface;** discussion is less contentious, with *Assessor recommending that they can provide residential characteristic data in an alternative matter or that they are willing to allow BOR to use the iasWorld Uniformity Grid*, since the BOR comparable tool is fed directly by Assessor data
 - BOR indicates they are “open to alternative solutions”
 - Assessor creates accounts for BOR super-stakeholders and all staff in iasWorld to allow them to start using Property Records Management, which replaces legacy mainframe ASIQ/AINQ transactions
 - Assessor offers to train all BOR staff with reviewing/using PRM, but at BOR request, only about 7 BOR users are trained
- Assessor emails BOR to let them know that testing for the import is ongoing and that BOT has encountered several successes. **As of the email, dated September 28, 2021, Assessor is ready to certify and transmit 8 towns. All work to date has been performed by Assessor and BOT.**
- Testing continues between Assessor and BOT, with BOR reviewing and attempting to interpret reports that are not fully processed yet.
- After several set-backs with the import and the errors still occurring, Assessor decides, at great opportunity cost to the office, to pivot in approach.
 - BOT makes a slight modification to an existing Assessor job, which allows BOT to import into required Assessor mainframe tables.
 - Assessor was able to transfer data from the mainframe tables into the Revision Writer program

- Although this allowed for the transfer of data as expected as part of the legacy process, it was not a clean update and the Assessor still had to make edits in AS400 in order to match the data and values from iasWorld
 - This would be the ongoing process for all 38 towns, for both initial assessment and post-appeal assessor certification
 - **Assessor was able to transmit the first town to BOR by November 5, 2021;** Assessor notified BOR of differences in the Homeowner Improvement Exemption (HIE) processing, to translate the new data formats into what BOR was familiar receiving.
 - **Thereafter, BOR “audited” the import for every town, after which audits they provided the Assessor a long list of “errors,” with the expectation of correction. BOR did not provide the Assessor the methodology that identified the “errors” until much later.** BOR’s list of “errors” largely mirrored the list of differences in HIE processing. These are not errors in the data but reflect differences in the computer language and formatting.
- In November 2021, BOR reached out directly to BOT to recommend a specific mainframe job that “may be used” to upload the residential characteristics into the mainframe to be available for BOR’s comp use tool.
 - This was against the previous statement that “all options would be explored” in terms of the Assessor being able to provide characteristics data to BOR
 - **BOR stated that they would not begin processing any work until Assessor provided the data to BOT for use in the BOR comp tool; BOR accepted no alternative delivery and they once again rejected the Assessor offer to use the iasWorld Uniformity Tool**
 - BOT and Assessor continued to work together to create an export from iasWorld that could be uploaded by BOT based on the previously accepted MVP list
- **Assessor continued to certify towns to BOR through November. When the Assessor attempted to certify Rogers Park on December 30, 2021, BOR rejected their audit and certification, since they were “unable to review the data in ASIQ/AINQ” due to spacing constraints outside of the control of the Assessor.** The issue was resolved by BOT in January and the Assessor was not able to certify the town until January 27, 2022, at which time the Assessor was also able to certify three additional towns.
- Assessor reassessed the last town in December 2021. **Assessor completed appeals in January 2022 and then began processing the data into the mainframe for transmission to BOR and other agencies.** Assessor certified its last town to BOR for 2021 on April 21, 2022. Assessor continues to wait for BOR 2021 results; this will delay the processing of non-Tri towns for 2022 reassessment processes.