

To: Honorable John P. Daley, *Chairman, Finance Committee*

From: William R. O'Shields
Chief Deputy Commissioner
Cook County Board of Review

CC: Annette C.M. Guzman, *Budget Director*
Department of Budget & Management Services

Date: November 3, 2022

Re: Request for Information from FY2023 Budget Hearing

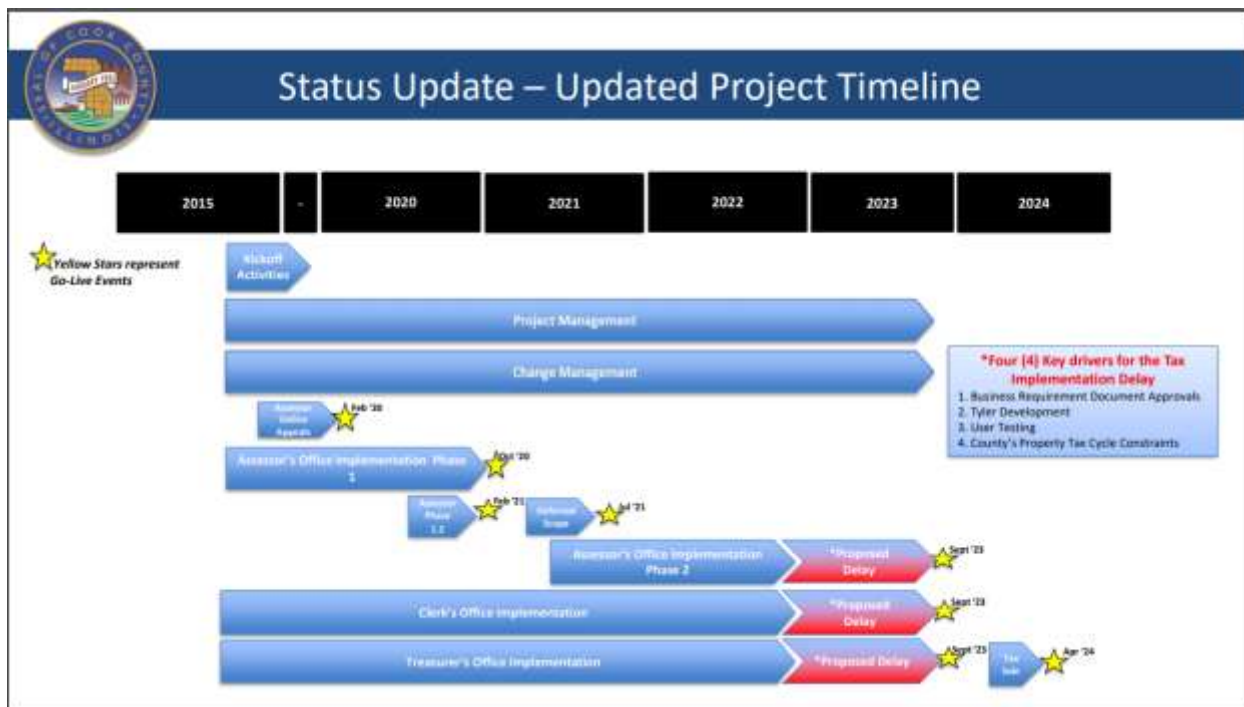
The following information is provided in response to questions posed at our department's budget hearing held on October 24, 2022.

Request ID# 1050-01

Commissioner Gainer requested a timeline for the integration of the Tyler system in BOR.

Response:

First and foremost, please note that during the CCBOR's October 24, 2022, Budget Hearing, Commissioner Rogers stated that any inquiries regarding the status of IPTS timelines should be referred to the Cook County Bureau of Technology (hereinafter "BOT"). That said, please refer to BOT's November 3, 2021 "IPTS Implementation Status Update" and specifically, the "Updated Project Timeline."



See “November 3, 2021 IPTS Implementation Status Update.”

Noticeably absent from the “Updated Project Timeline” is any reference to the Cook County Board of Review. However, this omission is consistent with the terms and conditions of the September 2015 contract between the “Cook County Government Bureau of Technology and Tyler Technologies, Inc.” (Contract No.: 1490-13787) (hereinafter “2015 IPTS Contract”) where the vendor was contracted to provide the following software modules:

3.3 Tyler Solution and Specific Software Functionality Required by Cook County

Tyler shall provide, install, configure and customize the Tyler Solution (software) as necessary to meet the County’s Property Tax needs. Tyler shall provide at least the following software modules to meet the County’s requirements:

1. CAMA;
2. Exemptions;
3. Tax Billing and Collection;
4. Inquiry and Appeals;
5. Field Mobile;
6. E-file;
7. Public Access;
8. Cashiering;
9. Content Management;
10. Analyze;
11. Activity Center;

See “Cook County Government Bureau of Technology and Tyler Technologies, Inc. Contract No.: 1490-13787.”

In sum, there are no CCBOR specific software modules outlined in the subject contract with the CCBOR singular but vital role of having the ability to “PULL” and “PUSH” assessment data from the proposed “future state” application, the Tyler solution “IASWorld” as it had from the “legacy” “mainframe” which is a data source shared by all members of the Cook County Property Tax Group which includes the CCAO, CCBOR, CC Clerk and CC Treasurer. Further discussion regarding the critical “PUSH” and “PULL” dynamic is forthcoming.

However, due to the gross mischaracterization of the CCBOR’s role/involvement in the IPTS and more importantly, the impact on the 2021 2nd Installment Tax Bill, it must be noted that the “2015 IPTS Contract” explicitly states that “THE BOARD OF REVIEW IS CURRENTLY AUTOMATING ITS PROCESSES VIA ONBASE SOFTWARE, THUS **TYLER SHALL IDENTIFY AND BUILD ALL BOR INTERFACES WITH ONBASE AND DOCUMENT SAID INTERFACES IN THE INTERGRATION PLAN.**” See “2015 IPTS Contract para. 3.3.1.8.”

3.3.1.8 BOR Process

The Board of Review is currently automating its processes via OnBase Software, thus Tyler shall identify and build all BOR interfaces with OnBase and document said interfaces in the Integration Plan.

More importantly, emphasizing that the CCBOR and CCAO appeals processes are separate and distinct, stating the following in subsection “L”:

- L. The Board of Review (BOR) appeals process is currently being automated via Hyland OnBase Software. This is not the same as the Assessor’s Appeals process or 2nd pass. Tyler shall automate the Assessor’s Appeals process, or 2nd pass. Tyler shall build the appropriate interfaces to the BOR OnBase implementation.

See also Section 3.3.2 “System Requirements” which state the following:

3.3.2 System Requirements

Tyler shall provide all functionality in-scope. The functionality listed below corresponds to the requirements identified by business process owners in the Uses Cases, which Tyler shall validate.

No.	Requirements	Module or Solution Name	In-scope?
	systems.		
5.011	System can capture credit card and e-check payments through the receipt of an interface file from external source (i.e., banks, credit card processors)	iasWorld	Yes
5.012	System can access Board of Review (BOR) review process finalized results from Onbase software.	iasWorld	Yes
5.013	System can interface with OnBase to present all relevant BOR PIN information for an analyst to make a decision.	iasWorld	Yes
5.014	System can associate (link) location of document in OnBase to a PIN.	iasWorld	Yes
5.015	System interfaces with the BOR OnBase system to pull the PTAB data and update the refunds values.	iasWorld	Yes

Regarding the CCBOR’s “integration,” See Section 3.6 “Integration” of the “2015 IPTS Contract which states the following:

3.6 Integration

Upon completing its initial assessment of the County’s Technology environment, Tyler shall document a plan that at minimum documents the required interfaces with sufficient detail to understand the data that will be pushed and/or pulled from each data source, including comprehensive diagrams. This plan should also outline the approach and timeline to build, test and accept interfaces. Tyler shall also discuss with the County the recommended interfacing approach such as web services, batch file processing, direct database integration via APIs, and/or the County’s Enterprise Service Bus (ESB) prior to finalizing any decisions or making any assumptions. The County shall review and approve the Integration Plan.

Tyler shall at minimum provide:

- a. An Integration Plan;
- b. An updated integrations/interfaces model/diagram;
- c. Planned interfacing method (real-time/batch, etc.);
- d. Estimated phased timeline for interfaces to go live;
- e. Approach to build and test each of the interfaces/integration;
- f. For each identified interface, Tyler shall alert the County to work with its vendors to estimate indirect level of effort by resources other than Tyler’s resources.
- g. Tyler shall at minimum build interfaces to the following existing technologies:

6.	OnBase Software.	OnBase is used in various Property Tax Offices including the BOR, Treasurer’s Office and Assessor’s Office. Tyler shall validate OnBase data feeds with all Offices.
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Therefore, pursuant to the “2015 IPTS Contract,” the vendor, Tyler, shall document an integration plan that, at a minimum, that documents the REQUIRED INTERFACES with sufficient detail to understand the data that will be PUSHED and/or PULLED from each data source which specifically includes NOT excludes OnBase. To date, such a plan does not exist nor contractually is it the responsibility of the CCBOR to create such a plan. See Section 3.6. However, the CCBOR has proactively secured capital project approval and funding to build an interface between the Cook County Assessor’s Office and the Cook County Board of Review. This capital project will complement Tyler’s efforts to establish this interface. Due to the well-known data dependencies of all members of the CC PT Group but particularly the numerous exchanges between the CCAO and CCBOR, the CCBOR’s ability to “PUSH” and “PULL” data to and from the future state application, “IASWorld” is critical to not only the entire CC PT Group but ultimately to all CC residents.

It should be noted that the CCBOR has actively participated in the IPTS efforts, producing “file layouts;” “process maps;” and “workflow maps” dating back to, at least February 2016, clearly pre-dating the current CCAO administration, however, this data has been saved and shared on the “Integrated Property Project Team” site.



Home + New Upload Edit in grid view Sync Add shortcut to OneDrive Pin to Quick access Export to Excel

BOR

Name	Modified	Doc Type	Lib Type	Add column
BOR Record layouts.zip	December 8, 2017	File Layout	File Layouts & Data Sampl	
BOR_Certificate_of_Error_Layout_SQL.pdf	December 8, 2017	File Layout	File Layouts & Data Sampl	
BOR_CR2INPUT.pdf	February 26, 2016	File Layout		
BOR_CR2OUTPUT.pdf	February 26, 2016	File Layout		
BOR_Exemption_06_Record_Layout_Access...	February 26, 2016	File Layout		
BOR_MF_Inventory.xlsx	December 8, 2017	Data Sample		
BOR_FTAB_Table_Layout.pdf	February 26, 2016	File Layout		
BOR_Re-view_Record_Layout.pdf	February 26, 2016	File Layout		
BORVTDTOCCAQ.pdf	April 3, 2018			
Integrated Property Tax Project Team-BOR...	September 27, 2017	Org Chart		
OS_HelperMFTable_structures.pdf	December 8, 2017	File Layout	File Layouts & Data Sampl	
revision_layout.docx	April 3, 2018			

It should be noted that the CCAO informed the CCBOR in late June of 2021 of its inability transmits assessment data via its future state application, “IASWorld” despite having launched Phase 1 of assessment “Go Live.” Nonetheless, CCAO, CCBOR, BOT and Tyler all collaborated on a solution that relied on the mainframe for the 2021 tax year. Presently, for the 2022 tax year, until an interface between the CCBOR’s OnBase application and “IASWorld” as contracted for is developed and tested, the CC PT Group will again rely on the mainframe “workaround” solution. This “interface” issue was identified and addressed in the “2015 IPTS Contract,” therefore, it is far from a “newly discovered” issue.

To that end, the CCBOR is unable to provide a timeline for the integration at this time nor is contractually obligated or tasked to do so. As stated, the vendor, Tyler, not the CCBOR is required to build specific “interfaces” between the CCBOR’s OnBase and the future state, “IASWorld” applications. However, the CCBOR has proactively secured capital project approval and funding to build an interface between the Cook County Assessor’s Office and the Cook County Board of Review. This capital project will complement Tyler’s efforts to establish this interface.

If you have any additional questions, please do not hesitate to contact me.

Thank you very much for your attention to this matter and please enjoy your day.