

Project Brief: The Real Estate Transfer Return E-filing Project

OTS and State & Local Finance are demonstrating the very early stages of a completely on-line, web-based system to replace a paper-bound process — Real Estate Transfer Returns in Green Bay on December 9. They plan to get the system up and running in Brown County, the pilot county, in the spring of 2005.

This is one of the most significant re-engineering projects undertaken at DOR because it automates a completely manual system and because it involves so many outside customers.

The current paper form is regarded as having one of the State's most paper-intensive processes. Having a variety of origination points, the originator is required to complete a form whenever a sale of real estate occurs for a property that is not exempt from real estate transaction fees. The filer submits the form with a processing fee to the County Register of Deeds along with a copy of the existing Deed. The fee is shared by County and State government according to statute. Stakeholders include the property Grantor, Grantee, County Register of Deeds, County Property Tax Lister, County Treasurer, DOR Bureau of Equalization and Special Assessment, local assessors, private sellers of real estate, banks, attorneys and title companies.

The benefits that will be realized as a result of converting the paper process to an electronically filed document include:

- Eliminating printing costs, paper, storage, photocopying and general paper handling.
- Eliminating data entry currently done at three different points in the workflow from county to state agency, plus reduction in key and transcription for the filers.
- Dramatically reducing handling and distribution of forms by the DOR Equalization District Offices and 1,200 local assessors.
- Creating a truly customer-focused web access to data and a subsequent reduction in customer service costs for local and state governments. Providing immediate web-browser access to non-confidential data creates an estimated annual savings across government totaling more than 45,000 hours annually.
- Increasing County and State revenue based on improving compliance and audit capabilities through automation. The state gets 80% of the fee, which is based on a rate of \$3.00 per thousand dollars of property value.

SLF Division Administrator Jean Gerstner and Brown County Register of Deeds Cathy Williquette have formed a partnership to use Brown County as the first implementation site. Other counties will follow during a state-wide rollout period.

The new system is being built upon the DOR FreeFile architecture for Individual Income Taxes, which satisfies several DOR strategic initiatives regarding customer service and the use of technology to reduce operational costs. This particular solution will reuse software and integrate existing processes as a means of containing IT development and maintenance costs. The system also requires no additional technology costs at the county level, and it will continue to support current paper filing processes. Many additional opportunities exist for counties that have vendor-provided software that wish to integrate electronically filed real estate transfer return data into their respective systems.

Counties can either use vendor-provided software or DOR software to prepare a return. The filer uses a Web application to send or prepare a validated electronic transfer return with DOR. The filer is provided a transfer summary sheet that they either mail or hand deliver, along with the deed and payment, to the County Register of Deeds. Once the Register of Deeds has recorded the transfer, the data is available to other authorized stakeholders.

DOR's Office of Technology Services team is demonstrating the first 30-day cycle of development, which includes:

- Establishing the DOR SOAP Server
- Establishing a working web service on the DOR SOAP Server
- Creating Sample SOAP messages (messages request services)
- Publishing XML schema and WSDL's needed by any vendor or client wishing to invoke the web service

The project is being managed by Jim Pahl-Washa of OTS under the direction of Jim Murphy of SLF. Other team members include Russ Reppen, Bonnie Bindl, and Scott Shields from SLF; Lisa Elliott, Gordon Thompson and Keith Gross from OTS; and contractors Max Rahder, Dave Winslow, Mike Brown and Aviran (Avi) Levy from CompuWare.

High-Level Technical Architecture

