2019 Annual Assessment Report (AAR) Checklist

Municipality:		Muni Code:		
Assessor:		DOR Reviewer:		Date:

Maintenance				
Not required, suggested		Required		**Pre-filled data**
Required if applicable		Not required		

AAR Page	DOR Reviewer Instruction	Yes	No	Field	Notes
Page 2 Assessor information	Confirm person signing roll information			Name	
Page 2 Assessment Information	Compare assessment type and AAR type for consistency			Assessment Type	
Page 2 Assessment Help	Did the assessor list help ?			Names	
Page 2 Check box #1	Additional staff as attachment ?			Attachment	
SECTION 1 General Municipality Information					
Page 3 Municipality general description	General description adequate ?			Text	
Page 3 Box #2	Section 1 Municipality general description as an attachment			Attachment	
SUMMARY OF REQUIREMENTS					
Page 3	Dates				
	1. Assessors oath. Verify each year				
	2. Mailed Notice of Assessment				
	3. Signed affidavit				
	4. Submitted to DOR				
	MAR				
	5. Corrections and omissions discovery				
	Discovered and corrected omitted real or PP			Yes No or NA	
	Provided property owners with written notice of appeal rights			Yes No or NA	
	6. Open Book Information				
	Date of First Open Book			Date	
	Number of parcels reviewed				
	Number of chagnes of value				
	Revised notices sent			Yes No or NA	
	7. Board of Review (BOR) information				
	Date of first BOR			Date	
	Reschedule date if needed			Yes No or NA	
	Assessor attended BOR			Yes No	
	8. Palpable errors or omitted parcels:				
	Reviewed and revalued property in error and cert. value with clerk			Yes No or NA	
	Verified with clerk, palpable error or omitted property added to the roll			Yes No or NA	
Page 4	9. Property inspection:				
	Number field inspected			Number	
	Inspection type			Interior, Exterior, Drive-by	
	10. Property sales			Number	
	11. Valid Sales				
	Reviewed for validity			Date	
	Number determined to be valid			Number	
	Number inspected			Number	
	12. Building permits:				
	Total number of building permits			Number	
	Number field inspected			Number	
	13. New Construction:			Number	
	Number of inspections:			Number	
	Analyzed new construction			YES NO NA	
	14 Agricultural parcels			Number	
	Total number of parcels			Number	
	Total number of inspections			Number	
	Type of inspections			Number	

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AAR Page	DOR Reviewer Instruction	Yes	No	Field	Notes
	On-site			Checkboxes	
	Drive -by			Checkboxes	
	On-line Maps, etc.			Checkboxes	
	Other			Checkboxes	
	15. Updated ag values with DOR values adjusted to assessment level			Yes No NA	
	16. Personal property:				
	Discovered			Yes No NA	
	Date returns sent			NA	
	Valued			Yes No NA	
	17. Conducted ratio study for:				
	Previous assessment date			Yes No NA	
	Current Assessment Date			Yes No NA	
SECTION 2-Scope of Work					
Page 5	Class 1 - assessment type percentage			Parcel Count	
	Class 2 - assessment type percentage			Parcel Count	
	Class 4 - assessment type percentage			Parcel Count	
	Class 5 - assessment type percentage			Parcel Count	
	Class 5m - assessment type percentage			Parcel Count	
	Class 6 - assessment type percentage			Parcel Count	
	Class 7 - assessment type percentage			Parcel Count	
	Personal Property - full revaluation				
Page 6	Scope of Work Notes				
Page 6 Box #3	Box #3 Scope of work as an attachment?				
Section 3- Assessment Statistics					
		Residential	Commercial	Other	
Page 7	Number of valid sales				
	Assessed value of valid sale parcels				
	Total sales price of valid sales parcels				
	Aggregate ratio				
	Mean				
	Median				
	Coefficient of dispersion				
	Coefficient of concentration				
	Price-related differential				
Page 7 Assessment statistics notes:	Notes provided?				
Page 7 Box #4	Check box Section 3 Assessment Statistics Notes ?			Attachment	
Page 8 Additional comments	Comments provided?				

ATTACHMENT LIST

All assessment types – required attachments
- Affidavit
- Assessment notice
- Name(s) of staff who completed assessment
- PRC sample(s)
- Summary of Open Book Actions (Form PR-130)

Any assessment type – optional attachments
- BOR notice
- Contract
- Map(s)
- There is no limit to the number of attachments you provide with your report

Comments: