

# Department of Tax Administration

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LOB #103

## **REAL ESTATE RECORDS MANAGEMENT**

### **Purpose**

This LOB reflects the supervision and oversight of the Records Management Branch of the Real Estate Division as mandated by Virginia Code §§ 15.2 and 58.1; Fairfax County Code, Chapter 4; and the Constitution of Virginia, Article X. In pursuing DTA's vision of "Generating Revenue Fairly", the Records Management Branch is committed to ensuring that the administration associated with the assessment of all real estate properties is accurately processed to allow for proper taxation of ad valorem real estate taxes.

### **Description**

The Records Management Branch is responsible for handling the data entry associated with all assessments of real estate properties for the purpose of ad valorem taxation. Real estate assessments generate approximately \$2.4 billion in General Fund revenue. This LOB provides critical support to the Real Estate Assessment-Residential and Real Estate Assessment-Commercial Lines of Business. The principal responsibilities under this LOB include the following duties:

- Data entry of all real estate property ownership transfers
- Data entry of all new subdivisions and parcel breakdowns
- Data entry of all probate and foreclosure data
- Data entry of all exempt, disabled veteran and surviving spouses, solar and abatement parcels
- Data entry of real estate property assessments by DTA and the State Corporation Commission (SCC)
- Data entry of all appeals (both administrative to DTA and Board of Equalization) and litigation cases filed with the circuit court
- Data entry of all new construction permits
- Maintenance of property cards and assessment records
- Communicating (verbally, by phone and in writing) internally and externally regarding assessment inquiries and parcel descriptor requests
- Processing all manual Notice of Assessment Change letters (NOAC, supplementals, appeals, certificates)
- Processing all Income and Expense surveys for commercial parcels (mailing and input)
- Processing all real estate address change requests
- Preparation of annual Commonwealth reports of real estate information
- Verification of all data entry for annual file roll
- Creation of Annual Landbooks

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## Benefits

The Records Management team handles more than 350,000 taxable residential and commercial real estate parcels, plus another 6,600 tax exempt properties. Staff assists business representatives, mortgage companies, attorneys, elderly and disabled citizens, disabled veterans and surviving spouses, tax exempt entities and numerous County and state agencies, each of which depend on the accuracy and availability of DTA's real estate data. The efficiency and effectiveness of this LOB is essential to ensuring that all real estate taxes are assessed and billed properly. The Real Estate Division also provides revenue forecasts for DMB and senior County management based on the information entered into the real estate data base by the Records Management team.

## Mandates

This LOB is fully mandated. The assessment administration of real property, both commercial and residential, is mandated by Virginia Code §§ 15.2 and 58.1; the Fairfax County Code, Chapter 4; and the Constitution of Virginia, Article X. Records management is a critical component of the assessment program.

## Trends and Challenges

The workload associated with the assessment of real estate parcels has remained consistent over the last several years. At the same time, staff often need to “wear multiple hats” and assist in areas outside their normal assignment in order to best serve the public. To that end, the Records Management Team is always “on call” to assist as overflow backup to DTA's central telephone call center. This provides immediate expansion capacity on the phone to serve the public when call wait times become excessive. This enables DTA to provide responsive customer service but it does sometimes present a stressful challenge to balance competing workload demands within the Real Estate Records Management LOB. Balancing each workload will continue to be a challenge within DTA, but one which the agency has years of experience in successfully handling.

Due to employee retirements in the last year, the Abstract Team within the Records Management LOB has experienced a spike in turnover. This also creates challenges in handling workload due to the learning curve of new staff, but DTA has used this as an opportunity to better cross-train staff within the section for succession planning. Succession planning will continue to be a challenge in the near-term as additional staff approach retirement eligibility.

DTA is continually looking at new technologies to improve efficiencies. Staff's current goal is that many of the taxpayer inquiries for information from the Real Estate Records Management LOB may soon be diminished as taxpayers become empowered to access their information directly through the new secure web portal, MyFairfax, launched in FY 2016.

With the development that has occurred within the County, and future growth that is anticipated, comes an additional increase in the workload for the Records Management team. Management will be tasked with the challenge of continuing to meet deadlines while maintaining the current service level.

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## Resources

Category	FY 2014 Actual	FY 2015 Actual	FY 2016 Adopted
<b>LOB #103: Real Estate Records Management</b>			
<b>FUNDING</b>			
<u>Expenditures:</u>			
Compensation	\$1,251,087	\$1,292,755	\$1,346,492
Operating Expenses	373,825	374,045	343,928
<b>Total Expenditures</b>	<b>\$1,624,912</b>	<b>\$1,666,800</b>	<b>\$1,690,420</b>
General Fund Revenue	\$154,202	\$149,121	\$151,423
<b>Net Cost/(Savings) to General Fund</b>	<b>\$1,470,710</b>	<b>\$1,517,679</b>	<b>\$1,538,997</b>
<b>POSITIONS</b>			
Authorized Positions/Full-Time Equivalents (FTEs)			
<u>Positions:</u>			
Regular	27 / 27	27 / 27	27 / 27
<b>Total Positions</b>	<b>27 / 27</b>	<b>27 / 27</b>	<b>27 / 27</b>

## Metrics

Metric Indicator	FY 2013 Actual	FY 2014 Actual	FY 2015 Actual	FY 2016 Estimate	FY 2017 Estimate
Total Taxable Parcels Processed	352,364	352,234	352,638	352,910	353,200
Assessment Notices & Income/Expense Surveys Manually Processed	23,668	23,904	20,503	25,000	30,000
Sales Verified/Deeds & Wills Abstracted	85,754	69,387	59,464	61,699	66,000
Disabled Veteran Applications Processed	467	166	241	204	223
Address Changes Processed	44,279	43,240	38,492	40,866	40,000
Phone Calls Answered	10,119	9,208	9,175	9,172	9,082

The majority of the workload within the Real Estate Records Management Team has remained steady from FY 2013 to FY 2016. There have been a significant number of data changes to properties as evidenced by the number of permits worked by clerical staff as well as upward changes in value for growth (new construction).

Valuation reductions and accompanying refunds attributable to exemptions, abatements, appeals and Board of Equalization volume has remained consistent. There was a substantial increase of tax appeals to the Fairfax County Circuit Court and associated clerical workload in FY 2014; however, current workload has returned to normal levels.

Factors that contribute to high level of performance within the Real Estate Records Management Team are careful quality review and cross training within the individual sections. Workload statistics are also highly sensitive to the economic cycles within the private real estate market.