


COUNTY OF YORK

MEMORANDUM

DATE: July 16, 2018

TO: York County Board of Supervisors

FROM: Neil A. Morgan, County Administrator 

SUBJECT: Treasurer and Commissioner of Revenue Offices Closing on July 31 at Noon for State Audit

As you know, Deborah Robinson will be retiring after 30 years of service to the citizens of York County at the end of the month. Because this is a critical position responsible for the safety of the County's cash and investments, the Code of Virginia requires a routine turnover audit be performed by State auditors. To perform the audit, the Treasurer's and Commissioner of Revenue's Offices will close to the public at noon on Tuesday, July 31st. All online payment options and drop box locations will remain available. Both offices will reopen on Wednesday, August 1st at 8:15 a.m., and resume regular business hours.

In advance of the early closing, we will be alerting citizens via our TV channels, website, and social media channels as well as signage in both offices. We are also coordinating with our neighboring DMV Select offices and Utility billing to minimize the walk-up traffic. I wanted to make you aware of the closing date and time in case you hear from citizens who may be inconvenienced.

McGettigan/3737


Copy to: Board of Supervisors
Vivian A. McGettigan, Deputy County Administrator
Mark L. Bellamy, Deputy County Administrator
Deborah Robinson, Treasurer
Ann Thomas, Commissioner of Revenue
Candice Kelley, Interim Treasurer

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SUBJECT: Major Milestones Reached for Two County Systems - Munis Phase 1 (Financial System) & Vision (Real Estate Assessment System)

The month of June marked significant technological advances for the County as the 30 year old financial management system (financials module) closed out for the last time and Munis opened in production for Phase I on time on July 2 for Finance and July 5 for all users. In addition, the more than 20 year old real estate assessment system which holds all of the County's individual real estate records closed with an anticipated "go-live" for the new system, Vision Government Solutions, in late July. Both of these milestones have required substantial dedicated resources to design new structures, convert and validate data, design electronic workflows, and train employees. The following is a brief update on the two systems.

I. Financial Management System (Munis):

The replacement of the County's 30 year old financial management system with the Tyler Munis Enterprise Resource Planning (ERP) Software System has been on a fast track for the past two years. The core function of the new system is to manage our Finance, Payroll, Human Resources, Utility Billing, and Tax systems. **As you can see from our visual, the "We are Here" yellow star is now in alignment with the "Go-Live" red star as Phase 1 Financials is now live.**



This has been an extraordinarily busy time for Finance, Treasury, and Information Technology staff, as well as many staff and managers throughout the County who have been learning how to use the new system while continuing their regular duties.

Training:

Since our May update memo, over 400 employees were trained from May 21 through June 8 with County, Schools, and Colonial Behavioral Health (CBH) employees participating in over 40 training sessions. These sessions were focused on system users who manage individual offices and were provided information on how to enter documents, approve transactions, and obtain information. Because some employees are initiators and some employees are approvers, a complex matrix was prepared to provide for training to the variety of employees. At the end of their training session, end users were able to practice what they had learned from the classes at their own desks using a training database. Many employees took advantage of this benefit with staff entering transactions and supervisors watching their inboxes and approving practice transactions so that they could be better prepared for the actual transition to the new system.

In the weeks following the training sessions, the County's training facility was opened up for hands-on lab time so that employees could practice and receive additional guidance. Lab time was also used for a "soft opening" where end users could enter in actual transactions.

Now that Munis has gone live, understanding the new system is even more critical to the end users. The Munis team continues to perfect the training and reinforce essential processes. The Munis team, along with the Munis consultants, have developed detailed manuals which can be customized to the individual employees' job functions. The Information Technology Department, Financial Systems Division, has developed an intranet site with information for the end users. Recently, the manuals were posted to the intranet site.



The screenshot displays the York County Intranet homepage. At the top, a banner reads "YORK COUNTY INTRANET" over a background of flowers. Below the banner is a dark blue navigation menu with the following items: "IT Home", "Tyler Munis", "Chart of Accounts Mapping", and "Munis End User Books". To the right of the menu, a breadcrumb trail reads: "Feature Links > Intranet > Our Areas > Information Technology > Tyler Munis > Munis End User Books". The main content area is titled "Munis End User Books" and lists several user manuals with blue underlined links: "Munis General Ledger - End User Book", "Munis Accounts Payable - End User Book", "Munis Inquiry and Reports - End User Book", "Munis Approver - End User Document", "Munis Purchasing - End User Book", and "Munis Budget - End User Book".

To increase responsiveness to the end users, subject area experts have been identified on our staff, as well as on the Schools and CBH staff. They have been fielding numerous calls and providing individualized assistance.

Start of Phase II (Human Resources and Payroll):

Now that Phase I has gone live, in three months we will be turning our focus to the Phase II implementation. This phase covers the Human Resources and Payroll modules. Fortunately, the Human Resources Department has not been heavily involved with Phase I; so as the lead department, they will arrive fresh for the Phase II kickoff in October 2018. Phase II will impact every employee as the employee self service module is an important enhancement of the new system.

Phase III (Utility Billing):

As we wrap-up Phase I and began Phase II, Phase III is on the horizon and will begin in late January 2019. This will be the shortest of all the phases impacting on the smallest number of employees and is expected to go-live in October 2019.

Exploring Phase IV, Tax Module, Options:

The Tax Module is potentially the most complicated and risky module involved in the system conversion. This is due to the unique and complex tax requirements which vary from state to state preventing standardization. Understanding the experiences of Virginia Munis users is critical before a decision can be made on whether Munis is the best option for York County. Commissioner of Revenue Ann Thomas has taken the lead in exploring the options for the tax module by arranging for site visits in August to Roanoke County and Isle of Wight to observe and talk with Commissioner of Revenue and Treasurer's Office staff to understand the capabilities and limitations of Munis from employees who have worked with the tax module for several years. Because the functionality of the Tax Module is critical to the Commissioner of Revenue and Treasurer's Office, the site visit will include the Interim Treasurer, Candice Kelley. It is my belief that after everyone has an opportunity to study this question, we will conclude that it is in the County's interest to implement the taxation model as well.

II. Real Estate Assessment System (Vision)

The County has been utilizing the Equity real estate assessment system for over 20 years. This system is used to manage the individual real estate property records and to calculate their assessments. Due to the complexity of the real estate assessment process and to provide modern tools to the staff, a new system which provides for Computer Assisted Mass Appraisal (CAMA) was purchased. This system provides for the following:

- Industry Standard Valuation Programs
- Compliance with Professional Standards
- Flexible Screen and Database Design
- Easy-to-Use Report Writer
- Powerful Sales Analysis and Income Analysis Tools

- Integrated Mapping Analysis Tools
- Integrated Imagery
- Built-in Graphical Sketch Tool
- Significant Integration with Other Systems
- Integrated Field Data Collection System

Over the past year staff from the Real Estate Office and Information Technology Department has worked diligently to convert over 26,000 property records into the new Vision Government Solutions System which will be used for the next reassessment.

Beginning in August appraisers will undertake the review of each property record to ensure accuracy of data, sketches and photos, as well as perform testing and validation of the data in the new system. The data conversion is just the first step in a successful implementation, as now the complex work begins to model assessment values to reflect York County's real estate market.

III. Conclusion:

I am pleased with the progress the County is making in its technology investments. Thus far, the problems we have encountered have been limited to the kinds of challenges expected during technology conversions. I greatly appreciate the staff's "can do" attitude during this stressful period. We look forward to sharing future updates as these projects continue.

McGettigan/3737

Copy to: Board of Supervisors
Vivian A. McGettigan, Deputy County Administrator
Mark L. Bellamy, Deputy County Administrator
Adam Frisch, Director of Information Technology
Theresa Owens, Director of Finance
Ann Thomas, Commissioner of Revenue
Maria Kattmann, Real Estate Assessor