Welcome to eCRV!

INITIAL DRAFT VERSION 0.2

September 2011

This document serves as an implementation overview guide for counties to prepare and implement the use of eCRV.

The home page for the eCRV application has links for the production application for submitters and local government staff, links for testing, and a link for eCRV project information. The home page for eCRV is located here:

taxes.state.mn.us/CRV/

Please reset old bookmarks you may have had for version 1 of the application.

Summary

Version 2 of the application has been released on August 15, 2011. All counties are encouraged to adopt eCRV.

A Certificate of Real Estate Value (CRV) is required to document a sale of property in Minnesota. CRV information is reviewed by the county of sale and the Department of Revenue to verify sale terms and ensure fair and equitable property tax assessments statewide.

eCRV allows submitters to create an eCRV for submission to the county. Once counties fully adopt eCRV, counties will be able to login to the system and accept and edit eCRVs on-line.

When to use eCRV vs. Paper Form

Currently, eCRV is available on a county by county basis. Submitters for sales in all other counties will still need to submit via paper until December 1, 2011.

eCRV may be used for ALL counties of sale as of December 1, 2011.

As of December 1, 2011, submitters are directed to use eCRV for all real-estate sales in Minnesota. Private SSNs and Tax IDs are separated immediately on submission.

- **For counties that do not yet have eCRV logins** (**Form Use**) submitters are instructed to print the eCRV (or eRecord a copy) to give to the county with the deed. The county then proceeds with their current paper process. Private SSNs/Tax IDs will have already been removed.

- **For counties that have eCRV logins** (**Full Use**), submitters will be instructed to provide the eCRV ID with the deed.

System requirements

eCRV requires Internet Explorer 7 (or greater) or FireFox. *Internet Explorer 6 will not work.* JavaScript and Cookies **must** be enabled within your browser.

Version 2 New Features

- New Version 2 look and feel
- Submit form has a partial save and load function
- Functions nearly the same as version 1

With eCRV version 2, all Minnesota counties are encouraged to begin testing, modify their existing process for working with eCRVs and adopt the eCRV system.

The eCRV Submission Process

The submit form for eCRV Version 2 functions almost the same as version 1, but has a new look and feel.

You may enter information to any tab in any order. Required fields are indicated with a red asterisk *, and MUST be entered to allow submission to the county. You may do a partial save for later edit prior to submitting a completed form to the county. See the Partial Save section below for more information.

When the form has been completely entered, you may click the Submit button to submit to the county. A receipt page will provide you with instructions to either note the CRV ID or save and print the eCRV PDF to submit with the deed to the county of sale.

Counties using the full eCRV system (**Full Use**) need only be given the eCRV ID along with the deed to retrieve the eCRV for county acceptance.
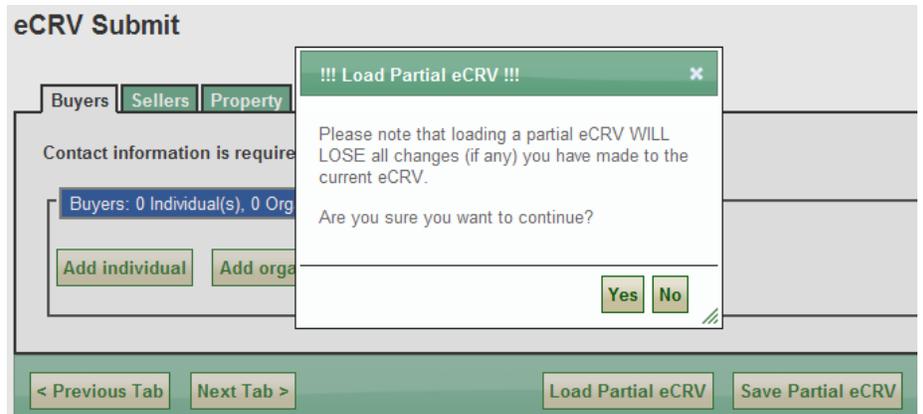
Counties not yet using the full eCRV system (**Form Use**) will need to be given a full copy of the resulting eCRV along with the deed. Submitters may print the eCRV, or include an electronic version (PDF or other) of the eCRV in an eRecording package if the county is able to accept eRecording submissions.

County Acceptance

Once a Full Use county is given the deed and the eCRV ID, or a Form Use county is given the deed and a copy of the printed eCRV or an electronic copy of the eCRV PDF, the county will review the information on the eCRV and the deed to determine if the eCRV and deed are acceptable for processing. If the eCRV is not acceptable, the county will notify the submitter, and ask them to complete a new eCRV for submission. Submitters are NOT able to edit or retrieve an eCRV once it has been submitted to the county.

Partial Save

Prior to submitting a completed eCRV form to the county, you have the option of saving a partially completed eCRV for retrieval and completion at a later time. Click the Partial Save button at the bottom of the screen. When you click this button, you will receive warning that you are leaving the eCRV form. Click continue, and remember the PIN/Passcode combination you are presented with. To retrieve a partially saved eCRV, open the eCRV form and click the Partial Load button. Enter the appropriate PIN/Passcode combination. The PIN/Passcode combination stays valid and consistent until a completed eCRV form is submitted to the county. You may pass along the PIN/Passcode to anyone necessary to complete the form.

Please note that Social Security numbers (SSN) and business tax numbers are NOT saved or retrieved in a partial save or load security purposes. You must reenter these numbers as necessary prior to complete submission to the county.

On complete submission to the county, the system separates SSNs and BTNs upon receipt from the rest of the data on the form. These numbers may be referenced only by authorized Department of Revenue staff and are never exposed externally, not even to county staff.

Keep in mind that whenever you leave the eCRV submission page, anything not saved or submitted will be lost.
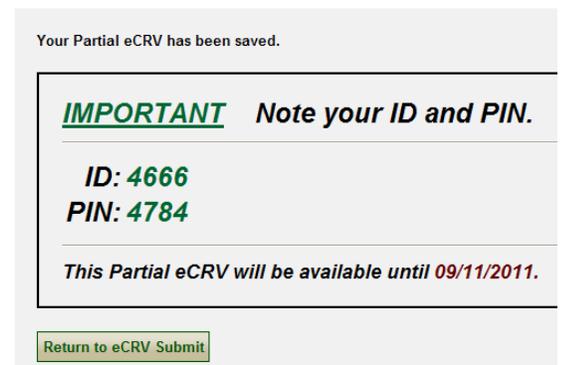
Testing eCRV

A test page is available as link on the main taxes.state.mn.us/CRV/ page.

eCRV Test Page

Submitters may simply enter and submit test eCRVs.

Local government staff need to obtain logins in order to login to the test sandbox and accept and edit submitted test eCRVs. To request test logins send an email to eCRV.Support requesting test logins for your county. For each user please provide the following;

First name, Last name, Middle initial, email, phone #, county office, title, supervisor rights yes or no.

Note, the middle initial is used to create the unique logins IDs. The supervisor role is needed for the following system actions:

- County Final an eCRV to the State
- Un-accept an eCRV
- Override the Auditor ID (after it has already been set)
- Override the Deed ID (after it has already been set)
- Change the County Settings

Also provide the Property ID mask (e.g. 99-9999-999) that may be in use by your county.

Basic eCRV County Process

Also After you have submitted some test eCRVs, you will want to login and begin working with them. The process usually follows this pattern:

Basic eCRV County Process
- Review eCRV as matching the deed.
- Accept eCRV (or notify submitter that a new matching eCRV is needed)
- Assign Auditor ID
- Determine the correct PIDs for the sale (including splits or combines)
- Route to the Assessor for review
- Review the sale (usually on the bases of primary property class)
- Enter all remaining county level data (assessment and other information)
- Enter the recommendation for state study
- Transfer the eCRV to the state Rep for review

Before you do this, however, you must define at least one initial workflow step; covered in the next section.

Defining the eCRV Workflow

Each county defines the workflow they will follow in processing eCRVs after acceptance from the submitter until transfer to the state. Testing the eCRV application is primarily the activity of determining the workflow you want to establish as a county.

To accept an eCRV, there must be at least one initial workflow step created. To do this, have a county user with Supervisor rights go to the "County Settings" screen of eCRV. Nearby is a screen shot showing the initial test workflow tasks created by Olmsted County in testing. Note the default display order is alphabetical, but clicking the Display
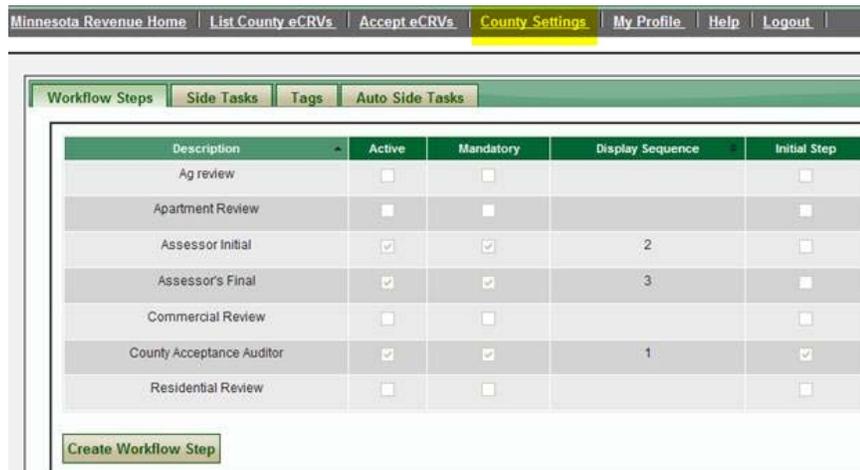
Minnesota Revenue Home | List County eCRVs | Accept eCRVs | County Settings | My Profile | Help | Logout |

Workflow Steps | Side Tasks | Tags | Auto Side Tasks

Description	Active	Mandatory	Display Sequence	Initial Step
Ag review	☐	☐		☐
Apartment Review	☐	☐		☐
Assessor Initial	☑	☑	2	☐
Assessor's Final	☑	☑	3	☐
Commercial Review	☐	☐		☐
County Acceptance Auditor	☑	☑	1	☑
Residential Review	☐	☐		☐

Create Workflow Step

Sequence column will order by the entered sequence numbers.

There are two kinds of tasks that can be assigned an eCRV.

- Workflow steps   (*primary one at a time path*)
- Side tasks   (*occasional tasks done in parallel*)

Workflow Steps

Workflow steps are primary tasks that may be assigned to an eCRV as it is processed by the county. Only one workflow step is active at a time and they can be assigned in any order as appropriate.

Side Tasks

Side tasks are tasks that may be assigned in parallel to workflow steps as the occasion warrants. An eCRV may have any number of side tasks assigned. When a side task is complete, the assignment must be removed. Many counties may not define any side tasks to use in processing eCRVs at all. An example of a side task may be

Designing Your Workflow

When thinking about workflows, please remember the following:
- Workflow steps are tasks.
- The current workflow step represents the current task needed or being performed.
- Workflow step are assigned one at a time. (There is only one active workflow step at a time, and a prior workflow step is unassigned when a new workflow step is assigned.)
- The initial step is always automatically assigned after an eCRV is accepted by the county.
- Workflow steps are not explicitly ordered. You can assign them in any order (except the initial step.)
- A workflow step marked 'Mandatory' means it has to have been assigned at least once during county processing in order for the transfer to the state to be allowed.
- You may rename a workflow step. (Old and current eCRVs will work with the new name.)
- You may inactivate a workflow step. (If you change your process in a way that a workflow step is no longer needed, you may simply de-activate it. Old eCRVs will still note the workflow steps they had been assigned.)
- Side tasks can be assigned anytime and exist in parallel to the current workflow step
- Side tasks have to be "removed" when completed.
- Auto side tasks allow you to assign a side task automatically when a particular workflow step has been assigned.
- Transfer to the state sets the county copy to read-only, so do it only when you are done with the eCRV.

It is recommend that a final end point workflow step (e.g. 'Final Review') be created and set to mandatory to provide a holding place prior to transfer to the state. In the above Olmsted example they used 'Assessor's Final' as the last step. In the example (see nearby screen above) from Dakota, they used "Assessor Complete".

Accepting an eCRV

After a submitter submits the eCRV, they must present the county with the eCRV ID (or a printed copy if the county is not yet using the full eCRV system) along with the deed. On receiving the deed and eCRV ID, the county logins into eCRV, and previews the eCRV to determine if it matches the deed.

When eCRVs are submitted they are not automatically accepted for processing. Many eCRVs might be submitted in error, or do not have sufficient information that matches the deed.

If the eCRV is not acceptable for county processing, the county notifies the submitter that a new eCRV must be created that matches the deed.

Select the "Accept eCRVs" link on the search screen (highlighted in yellow in the screen shot).

You then enter the eCRV ID for preview (scroll down the result screen to see all the information on the submitted eCRV). If the eCRV sufficiently matches the deed, then you accept it. Once accepted, a county

copy is created for processing, and it will now display in the initial search screen (if it matches the search criteria).

Note: A common problem is for submitters to confuse the production version of the eCRV submit form with the TEST version of the form. Test submissions should only be made using the

TEST Sandbox eCRV Submit form, and production submissions must only be made using the production eCRV Submit form. If an eCRV cannot be retrieved on-line in production, it may be because the form was submitted to the TEST site, and vice versa. In general, test eCRV IDs will be low numbers (e.g. between 3000-20,000), while production eCRV IDs will be numbers above 80,000.

Paper CRVs

Paper CRVs will continue to be submitted to, and accepted by, counties. It will take the combined efforts of counties, Revenue and industry to fully adopt eCRV as rapidly as possible. Paper CRVs will follow the existing paper process within your county.

Un-accept an eCRV

If you find that you accepted an eCRV from a submitter in error, or that it does not warrant processing, a county user with the supervisor role may un-accept an eCRV via the "Workflow" tab and "Administration" sub-tab. You must notify the submitter yourself. Submitters do not have logins and the eCRV system does not notify them.

Transfer to the State

When the county has completed the review and edit of an eCRV, including the entry of all relevant county data, a county user with the supervisor role may transfer the eCRV to the state for review via the "Workflow" tab and "Administration" sub-tab. The eCRV will be checked for validation of all required fields in order to allow the transfer. Once transferred, the county copy of the eCRV becomes Read-Only. No further edits are possible. In some circumstances, the state representative may transfer or "un-final" the eCRV back to the county, and it becomes editable and available for transfer to the state again.

Going to Production

After you have tested eCRV and determined the workflow the county wants eCRVs to follow prior to transfer to the state, you are ready to go to production. Each county is asked to make a one-time contribution prior to going to production. As of September 2011, seventeen counties have made the contribution. Only 14 counties contribute $5,000 or more, while 44 counties contribute $1,250 or less. You can view the contribution schedule by following the eCRV Project link from the main CRV web page.

eCRV Support

For support with logins or any other issue with eCRV please contact eCRV.Support via email or phone.

   eCRV.Support@state.mn.us   **or**   **651-556-eCRV (3278)**

DRAFT

Please note that this document is still in draft form and is being revised. It is intended to get you started in testing eCRV, and does not represent comprehensive documentation of the eCRV system. New versions will be posted on the eCRV Local Government Staff page linked from the main taxes.state.mn.us/CRV/ page. Thank you for your patience and suggestions.