



Department Appointment Scheduling Policy

Procedures and Guidelines

Lists of parcels for field work are queried by the Deputy. The lists are turned over to the Secretary to schedule appointments for both the Deputy and Appraiser. The Deputy must indicate in writing if there are any deadlines for the fieldwork to be completed. Typically there is no urgency and scheduling can be flexible. The Deputy and Appraiser will field approximately 10 parcels a day on alternating days and work on data entry when in the office.

The Secretary prints the electronic property record cards and telephones property owners to schedule appointments, or leaves messages on answering machines for property owners to call back to schedule appointments. Typically there will be only two messages left on answering machines for appointment scheduling; the messages should be left at different times of the day, and approximately two weeks apart. Messages for end of the year appointments to measure and list partial new construction may be left twice a week. There is more urgency in scheduling these appointments and completing the end of year work.

When telephoning to schedule appointments, if there is no answer in the morning and no answering machine, a second call should be made later in the day. A second session can be done a week later. Periodically the Deputy will make telephone calls to try and schedule appointments after working hours.

If there has been no response to phone contacts, the Deputy or Appraiser will take the property record along, ring the doorbell or knock on the door, and ask to view the property at that time, or schedule an appointment via cell phone. When there is no response, a door hanger will be left requesting the owner to contact the office for an appointment.

Notes on all attempts to contact should be documented on the printed property record card. When all attempts fail to bring results, the property record card is given to the Assessor to determine further action. Subsequently, an entry code of 9999 will be entered in the user defined "reval year" field. These parcels will be queried and a standard letter will be mailed requesting them to contact us for an appointment at a later date. If that also fails, the final procedure would be to update the photograph of the property and estimate a doamage value for apparent updates or changes.

When significant updates or changes are noted, a certified letter would be mailed explaining the need for the inspection and advising that the owner will lose the right to appeal any valuation change as a result of a doamage assessment per Wisconsin Statute (70.47 (7) (aa)).

In-house staff time must also be allowed for sketching and other entry work both before and after field inspections. Concentrated time periods are necessary for field staff to coordinate and complete the end-of-the-year work (*photographs, partially built listings and sketches, mobile homes park verifications for January statements, and personal property account verifications*).

Rules

Be courteous and professional in dealing with customers and staff. Never disagree with a taxpayer. That creates a less than amicable impression and makes it more difficult to schedule an appointment.

Generally, there is more flexibility for typical appointments. When there is a time limitation and no openings on the appointment schedule, work directly with the lister to schedule. Call the person back if necessary.

Be flexible when coordinating staff schedules and field inspection appointments. Find out what days work best for the homeowner and encourage appointments during department staff working hours.

Don't try to be the expert or guess on answers to potentially controversial questions. The priority is to schedule the appointment.

In cases where an owner is going through a family medical emergency or crisis, let them know we will be happy to contact them at a later date. If there is more urgency in scheduling the appointment, they may be able to tell you if any permit work was completed, or possibly never started.

Customers with difficult questions should be passed along to the Assessor or Deputy for explanations and/or scheduling.

After hours appointment times will be designated by the Deputy when necessary.

Scheduling Expectations

1. Try to schedule appointments on any given day in the same neighborhood.
2. Keep appointments as close to previously scheduled appointments as possible. Try to avoid chopping up the day with large gaps between appointments, and schedule approximately 10 appointments per day.
3. Contact permit holders to schedule appointments as jobs are completed.
4. Allow an added 15 minutes of driving time between appointments across town.
5. Schedule appointments at 30 minute intervals.
6. Fill in open time with drive-by's, photos, door hangers, if short breaks exist between appointments.
7. Allow a full 60 minute lunch hour for field staff.
8. Allow 15 minutes before lunch to drive the car back to city hall before lunch - and another 15 minutes after the hour to pick up the car for afternoon appointments.
9. Appointments can overlap between procedures (listing rotation work vs maintenance work).

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10. There is a deadline to complete maintenance work: remodeling, permits, etc.
11. The Deputy must approve early morning or after hours appointments, and will initial the appointment on the property record sheet prior to scheduling.
12. Appointments cannot be scheduled when days have been marked off to concentrate on other areas of work – unless the field person verbally approves and initials the appointment on the property record sheet prior to scheduling.
13. Keep some flexibility in scheduling to allow for the unexpected – typically no more than 30 minutes per day.

Examples include, but are not limited to the following:

- Someone is leaving town for an extended period of time and this is the only day they can schedule.
- Someone lives a considerable distance away and is only in town today.
- Owners work out of town and cannot be home during regular working hours.
- Someone that is difficult to contact shows up at the office.
- Elderly owner is in a nursing home and a relative is here temporarily to take care of the property.