



CATALIS™ 

Property Tax Administration
South Dakota Ratio Study





Ratio Study Training

Presented By:



David Salzer

Director
Business Development

- Review changes to ratio study workflow
- Review application workflow, features and functions
- Live Software Demonstration
- Discussion/Questions



Workflow



DOE



Register

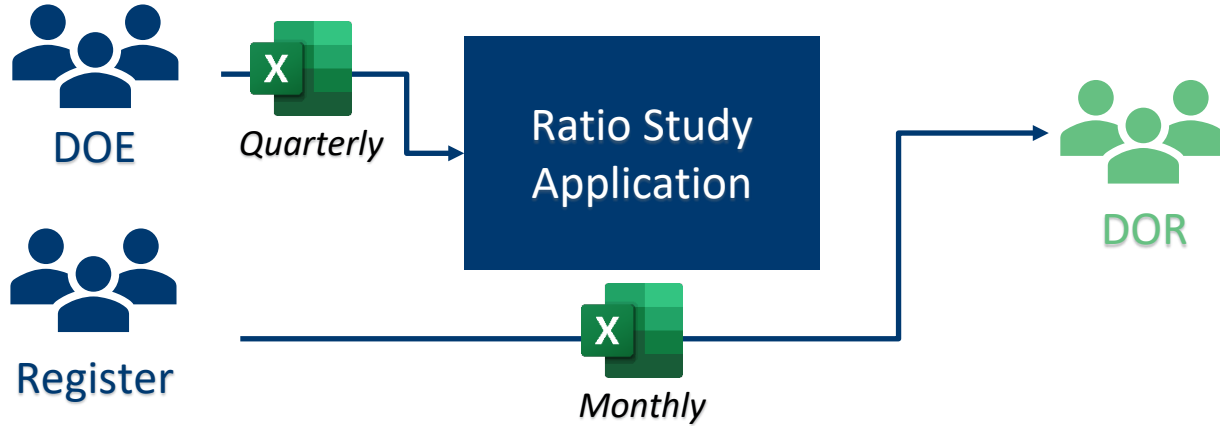
Ratio Study
Application

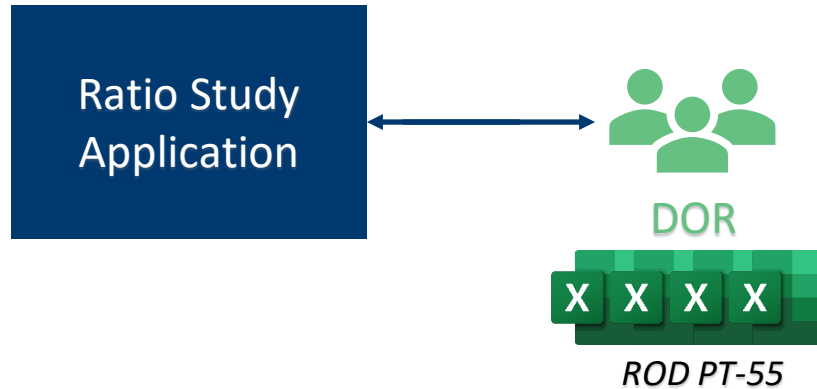


DOR









CATALIS™ | New Sales Workflow



DOE

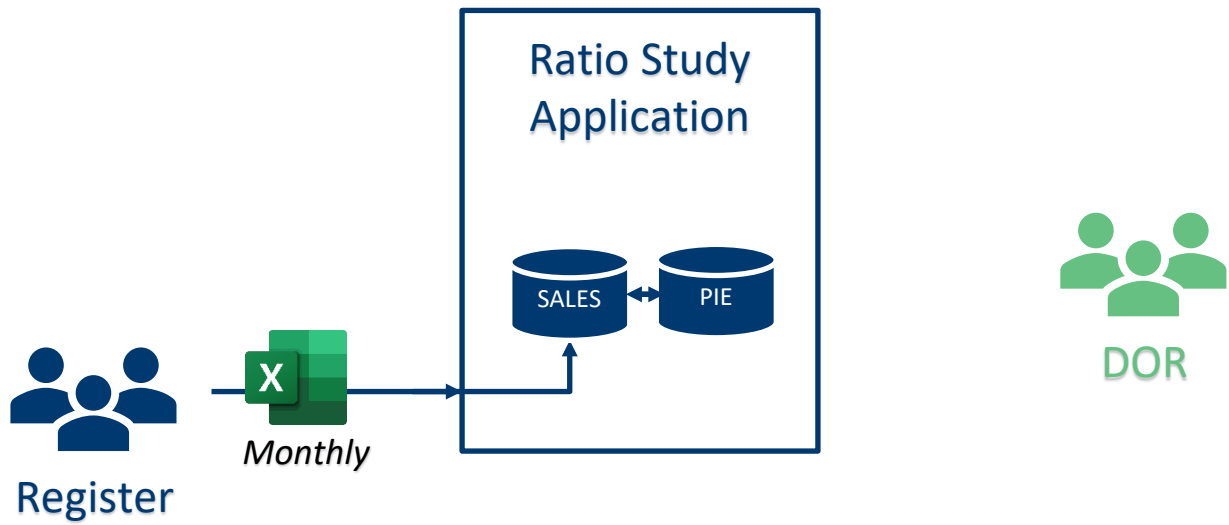


Register

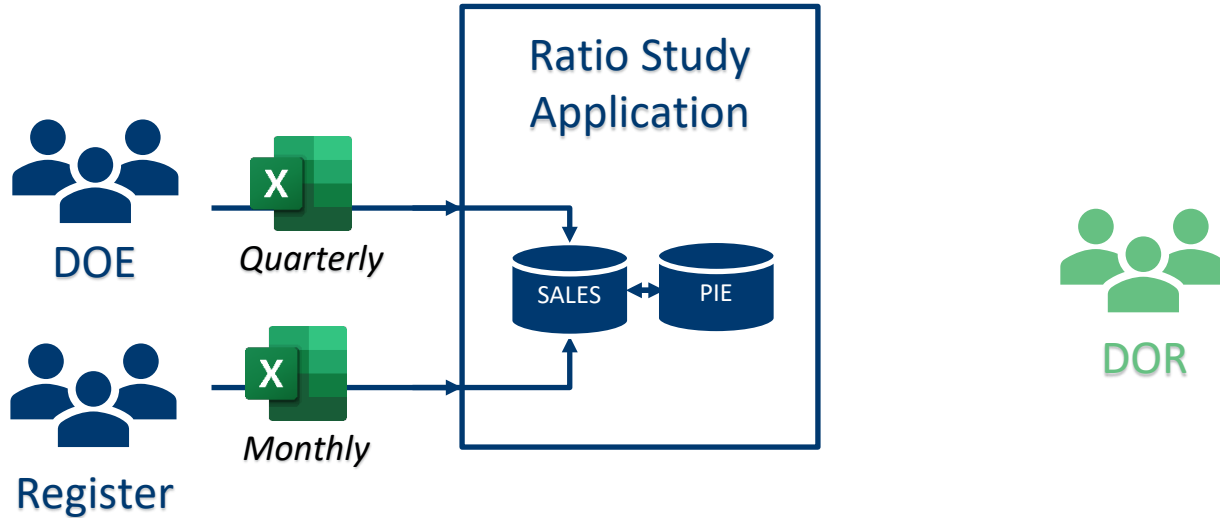
Ratio Study
Application



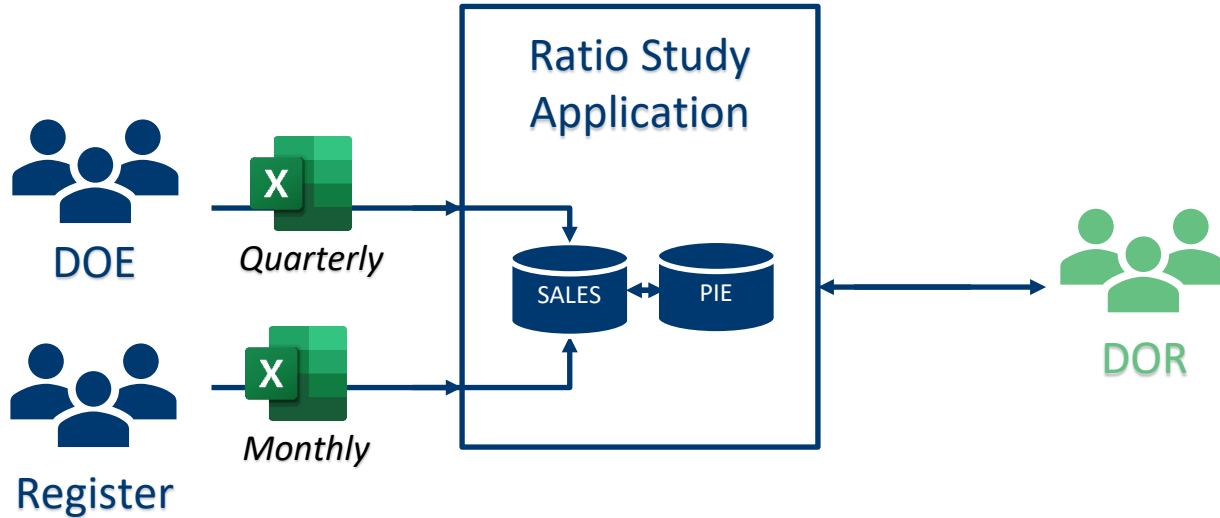
DOR



CATALIS™ New Sales Workflow



CATALIS™ New Sales Workflow



- You will be uploading sales like always
- You will be required to “Release” your validated sales to the state
- Sales that are not validated through an upload (missing sequences), will require manual validation
- This system has more features and functions than the previous, **but at the end of the day if your uploads match all sequence numbers nothing will change for you**

REMEMBER THIS
INFORMATION

County

ROD

DOE

State



County

Register PT-55 Upload

ROD

Seq 1

Seq 2

Seq 3

Seq 4

DOE

State



County

DOE PT-55 Upload

ROD

Seq 1
Seq 2
Seq 3
Seq 4

DOE

Seq 1

Seq 3

State



County

DOE Releases Verified Sales

ROD

Seq 1

Seq 2

Seq 3

Seq 4

DOE

Seq 1

Seq 3

State



County

DOR Works Unverified Sales

ROD

DOE

Seq 2

Seq 4

State

DOR Reviews Verified Sales

ROD

DOE

Seq 1

Seq 1

Seq 3

Seq 3



CATALIS™ New Sales Workflow

County

DOR Works Unverified Sales

ROD

DOE

Seq 2

Seq 4

State

DOR Can Return Sales

ROD

DOE

Seq 1

Seq 1

Seq 3

Seq 3



CATALIS™ New Sales Workflow

County

DOR Works Unverified Sales

ROD

DOE

Seq 2

Seq 3

Seq 4

Seq 3

State

DOR Reviews Verified Sales

ROD

Seq 1

DOE

Seq 1





Web Application Review

CATALIS™ | Web Application

- Ratio Study is separate from the E-File portal:
 - <https://sdsalesportal.org/>
- Reason why you need separate logins
 - Browser saved credentials
- You can login from any internet connected device

Jurisdiction: Meade ▾

Year: 2023 ▾



Ratios

Manage sales and run ratio studies.

No Studies Found
Local Verification: (0 / 78) Sales
State Verification: (0 / 78) Sales



County Selection

Jurisdiction: Meade ▾

Year: 2023 ▾

Year Selection



Ratios

Manage sales and run ratio studies.

No Studies Found

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Jurisdiction: Meade ▾

Year: 2023 ▾



Ratios

Manage sales and run ratio studies.

No Studies Found

Local Verification: (0 / 78) Sales

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Sales Completed by County

Sales Completed by State

The Sales Index screen shows all available sale records in sequence order

This level of data is analogous to viewing the folder tabs when you open the filing cabinet drawer

Hyde / Ratios / Sales

i The dropdown below allows you to see unverified sales (your work queue) and verified sales. Switching to verified sales will allow you to release sales to DOR.

All Upload Reports ▼

Seq	Verification	Questions	Instrument Date	Sale Price	Ratio	State PID
220115	Included	0	11/16/2022	\$398,500	0.00	
220116	Included	0	11/29/2022	\$499,000	0.00	
220117	Included	0	12/5/2022	\$175,000	0.00	
220118	Included	0	12/8/2022	\$147,500	0.00	
220119	Included	0	11/15/2022	\$74,500	0.00	
220120	Included	0	11/30/2022	\$0	-99.00	
220121	Included	0	12/20/2022	\$303,000	0.00	
220122	Included	0	12/23/2022	\$0	-99.00	
220123	Included	0	12/22/2022	\$315,000	0.00	
220124	Included	0	12/27/2022	\$0	-99.00	
230034	Included	0	1/18/2023	\$0	-99.00	
230035	Included	0	12/29/2022	\$0	-99.00	
230036	Included	0	2/9/2023	\$0	-99.00	
230037	Included	0	3/15/2023	\$0	-99.00	
230038	Included	0	3/15/2023	\$0	-99.00	
230039	Included	0	3/15/2023	\$0	-99.00	
230040	Included	0	3/10/2023	\$0	-99.00	
230041	Included	0	3/10/2023	\$0	-99.00	

Showing page 1 of 5 with 123 total records

Page Size 25 First Prev 1 2 3 4 5 Next Last

Help



The dropdown below allows you to see unverified sales (your work queue) and verified sales. Switching to verified sales will allow you to release sales to DOR.

All

Upload

Reports ▾

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230034	Included	0	1/18/2023	\$0	-99.00	
230035	Included	0	12/29/2022	\$0	-99.00	
230036	Included	0	2/9/2023	\$0	-99.00	
230037	Included	0	3/15/2023	\$0	-99.00	
230038	Included	0	3/15/2023	\$0	-99.00	
230039	Included	0	3/15/2023	\$0	-99.00	
230040	Included	0	3/10/2023	\$0	-99.00	
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Sale Status Control {

All

Upload

Reports ▾

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- The sale contains four (tabs) with different information
 - Overview: The sales overview screen shows a combination of data
 - PT-55 ROD Data
 - PIE Data for the parcel(s) involved in the sale
 - PT-55 DOE Data (Validated Sales information)
 - Properties: Controls the PIE records associated with the sale
 - Attachments: Documents or other information attached by users
 - Questions: Message board interface for State and DOE to discuss sale

Submit



Verify Sale



PT-55 Register Data

Seq	230060
Document	066-634
Instrument Date	3/31/2023
Recording Date	4/6/2023
Deed Exemption Code	Exempt-Incorrect Format Given
Buyer	DEBRA BORMANN SURVIVOR'S TRUST
Mailing	39261 265TH. ST. STICKNEY, SD 57375
Seller	DELTON BORMANN FAMILY TRUST
Mailing	39261 265TH ST. STICKNEY, SD 57375
Property Address	

DOR Property Information Exchange Data

State PID	46003-8-0-6-102-66-1-0- View Map 
Local PID	8-0-6-102-66-1-0-
Cat Code	
Assessed Value	\$18,993
0	\$18,839
Acreage (PY)	14.00 (14.00)
Situs	
Mailing	
Owner	MICHAEL A HANTEN & MARK D HANTEN
Legal	LOT 1 & 7 IN NE1/4 6-102-66

**Multi-Parcel sale. See Properties tab for details.*

Verification

	Source Data	PT-55 DOE Values
Ratio	134.72%	130.95%
Sale Price	\$434,000	\$434,000
Assessed Value	\$584,695	\$568,342
PY Listed Value	\$581,897	\$0
Reject Codes	Included	Included
Classification	A	A
Land Value	\$584,695	\$568,342
Improvement Value	\$0	\$0
Acreage		
Local Comment	0,99 GOOD SALE OFFERED BY REALTOR	

Verified by County User | 9/12/2023

[Overview](#) [Properties](#) [Attachments](#) [Questions](#)

Sale Elements

Submit Verify Sale 

PT-55 Register Data

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Instrument Date	3/31/2023
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[Overview](#) [Properties](#) [Attachments](#) [Questions](#)


PT-55 Register Data

Submit Verify Sale 

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[Overview](#) [Properties](#) [Attachments](#) [Questions](#)Submit Verify Sale 

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PIE Data

Property /

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Sale Verification

Verified by County User | 9/12/2023

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Controls {

Submit



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Verified by County User | 9/12/2023

Properties (Buyer: TOM J. SCOTT, Seller: PATRICIA A. KNIGGE, Address:)

Add Property

Reports ▼

	State PID	Parcel ID	Situs	Owner	Legal	Value PY	Value
▼	31- 101- 1- 4- -0-0-00001	31- 101- 1- 4- -0-0-00001		LYNN A ANDERSON & JOLENE M ANDERSON	LOTS 1 & 2 & E 20' LOT 3 BLK 4 ORIGINAL ADDITION TO THE CITY OF PLANKINTON	\$293,300	\$293,300

Showing 1 to 1 of 1 rows

Total PY: \$293,300
Total: \$293,300

Aurora (2023) / Sales / Properties

[Overview](#) [Properties](#) [Attachments](#) [Questions](#)

Properties (Buyer: DEBRA BORMANN SURVIVOR'S TRUST, Seller: DELTON BORMANN FAMILY TRUST, Address:)

[Add Property](#)

Reports ▼

	State PID	Parcel ID	Situs	Owner	Legal	Value PY	Value
▼	8- 0- 6- 102-66 -1-0-	8- 0- 6- 102-66 -1-0-		MICHAEL A HANTEN & MARK D HANTEN	LOT 1 & 7 IN NE1/4 6-102-66	\$18,839	\$18,993
▼	8- 0- 6- 102-66 -2-0-	8- 0- 6- 102-66 -2-0-		MICHAEL A HANTEN & MARK D HANTEN	LOT 2, 3 & 4 & SE1/4 NW1/4 6-102-66	\$307,598	\$309,184
▼	8- 0- 6- 102-66 -3-0-00001	8- 0- 6- 102-66 -3-0-00001		MICHAEL A HANTEN & MARK D HANTEN	LOT 5, 6, 8 & 9 IN SW1/4 6-102-66	\$255,460	\$256,518

Showing 1 to 3 of 3 rows

Total PY: \$581,897
Total: \$584,695

Multi Parcel Sales

Aurora (2023) / Sales / Properties

Overview

Properties

Attachments

Questions

Attachments (Buyer: DEBRA BORMANN SURVIVOR'S TRUST, Seller: DELTON BORMANN FAMILY TRUST, Address:)

Add Attachment

Reports ▼

Name	Type	Document Date	Notes	Uploaded	Uploaded By
No matching records found					

[Aurora \(2023\)](#) / [Sales](#) / Questions[Overview](#) [Properties](#) [Attachments](#) [Questions](#)

Questions (Buyer: DEBRA BORMANN SURVIVOR'S TRUST, Seller: DELTON BORMANN FAMILY TRUST, Address:)

[New Question](#)[Release Questions](#)[Reports ▼](#)

CATALIS™ | New Process

- I know, this is a lot to digest....
- This was just the background information
- The process you follow is simple
 - Load PT-55 DOE File
 - Release Verified Sales

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i The dropdown below allows you to see unverified sales (your work queue) and verified sales. Switching to verified sales will allow you to release sales to DOR.

Unverified ▼

Upload

Reports ▼

Seq	Verification	Questions	Instrument Date	Sale Price	Ratio	State PID
220910	Included	0	12/6/2022	\$0	-99.00	
220911	Included	0	12/6/2022	\$175,000	0.00	
220912	Included	0	7/25/2020	\$124,500	0.00	
220913	Included	0	11/30/2022	\$0	-99.00	
220914	Included	0	12/1/2022	\$424,000	0.00	
220915	Included	0	11/10/2022	\$0	-99.00	
220916	Included	0	12/8/2022	\$120,000	0.00	
220917	Included	0	12/8/2022	\$0	-99.00	
220918	Included	0	12/8/2022	\$0	-99.00	
220919	Included	0	12/8/2022	\$55,000	0.00	
220920	Included	0	12/6/2022	\$16,000	0.00	
220921	Included	0	12/9/2022	\$4,000	0.00	
220922	Included	0	11/16/2022	\$0	-99.00	
220923	Included	0	12/5/2022	\$115,000	0.00	
220924	Included	0	12/16/2022	\$0	-99.00	
220925	Included	0	12/16/2022	\$0	-99.00	
220926	Included	0	12/16/2022	\$260,000	0.00	
220927	Included	0	11/16/2022	\$136,500	0.00	

Showing page 5 of 21 with 525 total records.

Page Size 25 ▼ First Prev 3 4 5 6 7 Next Last

i The dropdown below allows you to see unverified sales (your work queue) and verified sales. Switching to verified sales will allow you to release sales to DOR.

Unverified

Controls Sales in Table


Upload

Reports

Seq	Verification	Questions	Instrument Date	Sale Price	Ratio	State PID
220910	Included	0	12/6/2022	\$0	-99.00	
220911	Included	0	12/6/2022	\$175,000	0.00	
220912	Included	0	7/25/2020	\$124,500	0.00	
220913	Included	0	11/30/2022	\$0	-99.00	
220914	Included	0	12/1/2022	\$424,000	0.00	
220915	Included	0	11/10/2022	\$0	-99.00	
220916	Included	0	12/8/2022	\$120,000	0.00	
220917	Included	0	12/8/2022	\$0	-99.00	
220918	Included	0	12/8/2022	\$0	-99.00	
220919	Included	0	12/8/2022	\$55,000	0.00	
220920	Included	0	12/6/2022	\$16,000	0.00	
220921	Included	0	12/9/2022	\$4,000	0.00	
220922	Included	0	11/16/2022	\$0	-99.00	
220923	Included	0	12/5/2022	\$115,000	0.00	
220924	Included	0	12/16/2022	\$0	-99.00	
220925	Included	0	12/16/2022	\$0	-99.00	
220926	Included	0	12/16/2022	\$260,000	0.00	
220927	Included	0	11/16/2022	\$136,500	0.00	

Showing page 5 of 21 with 525 total records.

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 The dropdown below allows you to see unverified sales (your work queue) and verified sales. Switching to verified sales will allow you to release sales to DOR.

Unverified ▼

Access to Upload Button {

Upload

Reports ▼

Seq	Verification	Questions	Instrument Date	Sale Price	Ratio	State PID
220910	Included	0	12/6/2022	\$0	-99.00	
220911	Included	0	12/6/2022	\$175,000	0.00	
220912	Included	0	7/25/2020	\$124,500	0.00	
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220917	Included	0	12/8/2022	\$0	-99.00	
220918	Included	0	12/8/2022	\$0	-99.00	
220919	Included	0	12/8/2022	\$55,000	0.00	
220920	Included	0	12/6/2022	\$16,000	0.00	
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220922	Included	0	11/16/2022	\$0	-99.00	
220923	Included	0	12/5/2022	\$115,000	0.00	
220924	Included	0	12/16/2022	\$0	-99.00	
220925	Included	0	12/16/2022	\$0	-99.00	
220926	Included	0	12/16/2022	\$260,000	0.00	
220927	Included	0	11/16/2022	\$136,500	0.00	

Upload

Upload Type

-Select-

▼

Upload File

Select file...

Browse

Cancel

Upload

Upload

Upload Type

-Select-

▼

-Select-

PT-55 Director of Equalization (DOE)

Upload File

Select file...

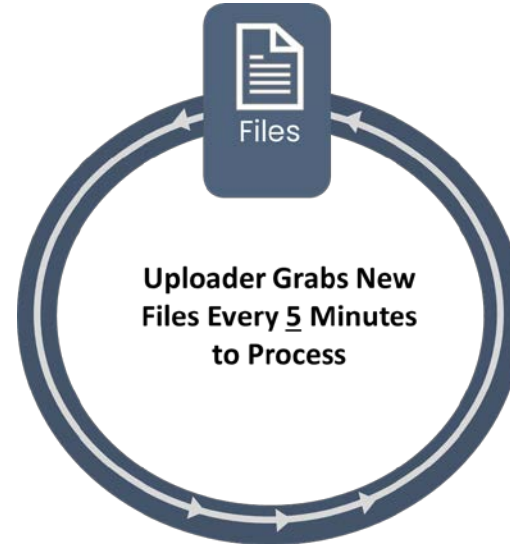
Browse


Cancel

Upload

CATALIS™ | Upload Sales File

- Uploads must meet required formats
- Uploads run on a five-5 minute loop



 The dropdown below allows you to see unverified sales (your work queue) and verified sales. Switching to verified sales will allow you to release sales to DOR.

Verified 


Release

Upload

Reports 

Seq	Verification	Questions	Instrument Date	Sale Price	Ratio	State PID
230060	Included	0	3/31/2023	\$434,000	1.31	46003-8- 0- 6- 102-66 -1-0-,4600...
230061	99 - Other from Import	0	4/5/2023	\$30,000	16.77	46003-1- 0- 23- 101-63 -2-0-
230062	Included	0	1/1/2023	\$74,500	0.52	46003-33- 301- 18- 32- -0-0-
230063	99 - Other from Import	0	4/17/2023	\$0	-99.00	46003-7- 0- 34- 102-65 -2-0-01
230064	99 - Other from Import	0	4/14/2023	\$120,000	0.28	46003-32- 206- 1- 22- -0-0-05
230065	Included	0	4/6/2023	\$6,500	14.98	46003-32- 209- 1- - -0-3-00001,4...
230066	Included	0	4/5/2023	\$0	-99.00	46003-31- 123- 15- - -0-0-
230067	99 - Other from Import	0	4/5/2023	\$0	-99.00	46003-17- 0- 11- 105-63 -4-0-
230069	99 - Other from Import	0	4/20/2023	\$0	-99.00	46003-1- 0- 23- 101-63 -2-0-
230070	99 - Other from Import	0	4/24/2023	\$0	-99.00	46003-31- 111- 1- 5- -0-0-,46003...
230071	99 - Other from Import	0	4/25/2023	\$8,000	36.66	46003-31- 101- 1- 4- -0-0-00001

Showing page 1 of 1 with 11 total records.

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Test Server

Aurora / Ratios / Sales

The dropdown below allows you to see unverified sales (your work queue)

Verified

Release

Upload

Reports

Confirmation

Are you sure you want to release applicable sale?

No

Yes

Seq	Verification	Questions	Instrument Date	Sale Price	Ratio	State PID
230060	Included	0	3/31/2023	\$434,000	1.31	46003-8- 0- 6- 102-66 -1-0-;4600...
230061	99 - Other from Import	0	4/5/2023	\$30,000	16.77	46003-1- 0- 23- 101-63 -2-0-
230062	Included	0	1/1/2023	\$74,500	0.52	46003-33- 301- 18- 32- -0-0-
230063	99 - Other from Import	0	4/17/2023	\$0	-99.00	46003-7- 0- 34- 102-65 -2-0-01
230064	99 - Other from Import	0	4/14/2023	\$120,000	0.28	46003-32- 206- 1- 22- -0-0-05
230065	Included	0	4/6/2023	\$6,500	14.98	46003-32- 209- 1- - -0-3-00001,4...
230066	Included	0	4/5/2023	\$0	-99.00	46003-31- 123- 15- - -0-0-
230067	99 - Other from Import	0	4/5/2023	\$0	-99.00	46003-17- 0- 11- 105-63 -4-0-
230069	99 - Other from Import	0	4/20/2023	\$0	-99.00	46003-1- 0- 23- 101-63 -2-0-
230070	99 - Other from Import	0	4/24/2023	\$0	-99.00	46003-31- 111- 1- 5- -0-0-;46003...
230071	99 - Other from Import	0	4/25/2023	\$8,000	36.66	46003-31- 101- 1- 4- -0-0-00001

Showing page 1 of 1 with 11 total records.

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Last

 The dropdown below allows you to see unverified sales (your work queue) and verified sales. Switching to verified sales will allow you to release sales to DOR.


Unverified 

Upload

Reports 

Seq	Verification	Questions	Instrument Date	Sale Price	Ratio	State PID
220910	Included	0	12/6/2022	\$0	-99.00	
220911	Included	0	12/6/2022	\$175,000	0.00	
220912	Included	0	7/25/2020	\$124,500	0.00	
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Showing page 5 of 21 with 525 total records.

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Overview
Properties
Attachments
Questions

Submit

Verify Sale

PT-55 Register Data

Seq	222936
Document	128-2917
Instrument Date	10/28/2022
Recording Date	11/1/2022
Deed Exemption Code	Exempt-Incorrect Format Given

Buyer

TALON M BUIE

Mailing

6123 S ALKI PL
SIOUX FALLS, SD 57108

Seller

JAMES III BURMA

Mailing

298 E CHRSTNUT ST
WINDSOR, CO 80550

Property Address

DOR Property Information Exchange Data

State PID	46083-283.12.01.003B View Map
Local PID	283.12.01.003B
Cat Code	
Assessed Value	\$206,313
0	\$187,959
Acreage (PV)	0.00 (0.00)
Situs	
Mailing	
Owner	BUIE, TALON M
Legal	SF - DONAHOE FARMS ADD - LOT 3B - BLK 1

Verification

	Source Data	PT-55 DOE Values
Ratio	71.47%	75.71%
Sale Price	\$263,000	\$263,000
Assessed Value	\$187,959	\$199,109
PV Listed Value	\$0	\$0
Reject Codes	Included	Included
Classification	D+D1	D+D1

Land Value

\$22,900

\$22,900

Improvement Value

\$165,059

\$165,059

Local Comment

Verified by County User | 7/14/2023

Click "Verify" to edit the sale information and/or verify the sale. Clicking "Submit" will send the sale to the state. Note that when a sale has been sent to the state, it cannot be edited.

Overview Properties Attachments Questions

PT-55 Register Data

Seq	222936
Document	128-2917
Instrument Date	10/28/2022
Recording Date	11/1/2022
Deed Exemption Code	Exempt-incorrect Format Given

Buyer

TALON M BUIE
6123 S ALKI PL
SIOUX FALLS, SD 57108

Seller

JAMES III BURMA
298 E CHIRSTNUT ST
WINDSOR, CO 80550

Property Address

DOR Property Information Exchange Data

State PID	46083-283.12.01.0038 View Map
Local PID	283.12.01.0038
Cat Code	
Assessed Value	\$206,313
0	\$187,959
Acreage (PY)	0.00 (0.00)
Situs	
Mailing	
Owner	BUIE, TALON M
Legal	SF - DONAHOE FARMS ADD - LOT 38 - BLK 1

Verification

Ratio	
Sale Price	
Assessed Value	
PY Listed Value	
Reject Codes	
Classification	
Land Value	
Improvement Value	
Local Comment	

Verify Sale

PT-55 DOE Values

Ratio	75.71%
Sale Price	263,000
Assessed Value	199,109
PY Listed Value	0
Land Value	22,900
Improvement Value	165,059

Reject Codes (Local) -Select- Classification (Local) D+D1

Comments

Cancel Verify

Verified by County User | 7/14/2023



Demonstration

CATALIS 

- Site Preparation
 - Each county with valid ROD submissions will have their data loaded
 - Counties have three states
 - Operational
 - Backlog
 - Deficient
 - **If your ROD has not submitted-YOU CANNOT LOAD YOUR DOE FILE**

CATALIS™ | Credentials

- If you submitted a credentials request form already it has been processed and sent to you
- If you need credentials
 - Request form: <https://forms.gle/wRptcKcPmYp3GbWy6>

CATALIS™ | Loading DOE Data

1. Run a sales file from 11/1/2022-7/31/2023 or 11/1/2022-8/31/2023
2. Validate that the output matches the state required format
3. Login to: <https://sdpropertytaxportal.org/>
4. Load the sales file to the portal
5. Release verified sales to DOR

IF YOU NEED ASSISTANCE PLEASE CONTACT SUPPORT@AXIOMNH.COM



Ratio Study Training

CATALIS 

