

**Aumentum Technologies Tax User Group
Meeting Minutes – Thursday April 2nd, 2026**

Attendee	County or Organization	In Person/Zoom
Jodie Raymond	Anoka County	Zoom
Geoffrey Hamilton	Aumentum Technologies	Zoom
Kurt Peterson	Aumentum Technologies	Zoom
Lori Johnson	Clay County	Zoom
Jill Murray	Clay County	Zoom
Darren Esser	MN DOR	Zoom
Jessica Blair	MN DOR	Zoom
Amanda Beyer-Schulte	MnCCC	Zoom
Lisa Meredith	MnCCC	Zoom
Jonathan Simon	MnCCC	Zoom
Joe Heying	Morrison County	Zoom
Amy Ohnstad	Morrison County	Zoom
Shayla Strack	Morrison County Assessor's Office	Zoom
Laurie Clendenning	Mower County	Zoom
Jaci Kopet	Nicollet County	Zoom
Annalee Jones	Polk County	Zoom
Denise Anderson	Rice County	Zoom
Rebecca Kotek	Rice County	Zoom
Jody Wagner	Rice County	Zoom
Kathy Howard	Roseau County Assessor's Office	Zoom
Kathy Jenson	Roseau County	Zoom
Heather Bryant	Washington County	Zoom
Michele Burg	Washington County	Zoom
Jody Moran	Washington County	Zoom

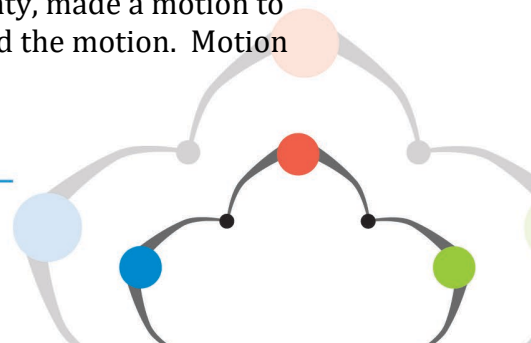
Call To Order: Laurie Clendenning, Mower County called meeting to order at 10:03 am.

Volunteer Recording Officer: Annalee Jones, Polk County, volunteered to be the recording officer for today's meeting.

Introductions/Roll Call: The attendees introduced themselves as reflected above.

Approve Agenda: Kathy Jenson, Roseau County, made a motion to approve the agenda. A second was made by Jaci Kopet, Nicollet County. Motion carried.

Approval of March 5th, 2026, Minutes: Jody Moran, Washington County, made a motion to approve the minutes as presented. Jody Wagner, Rice County, seconded the motion. Motion carried.



Financial Report: Jonathan Simon, MnCCC, presented the Financial Report for review and approval. Per Jonathan, he corrected the net amount on the report, and he will be adding a section for new invoices and charges from Aumentum Technologies to the counties so that the Tax User Group can review and approve them prior to the invoices being paid to Aumentum. Denise Anderson, Rice County, asks that the Tax User Group discuss the third quarter charges from Aumentum prior to making any payments, due to the number of outstanding tickets. Denise also stated that Rice County is not signing off on their Project Closure DAS with Aumentum Technologies for their Platform project upgrade due to the outstanding issues that have not been resolved.

Kathy Jenson, Roseau County, made a motion to approve the financial report. A second was made by Jaci Kopet, Nicollet County. Motion carried.

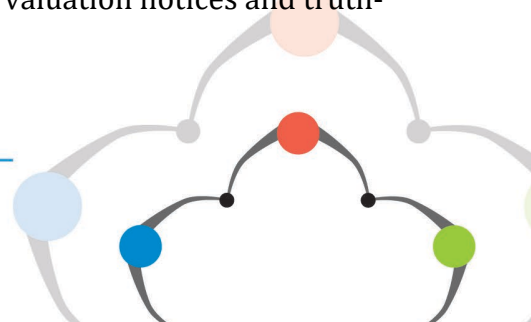
MnDOR Update:

Darren Esser, MN DOR reported the following:

- Asked Counties to please send their individual Senior Citizen Property Tax Deferral amounts to Jessica Blair at MN DOR, send the email to proptax.deferral@state.mn.us. Please send these amounts in by April 15th, 2026.
- Legislative session has been keeping the A/T team busy this year, they are spending most of their time compiling bill explanations. There is lots of discussion around passing a bill for levy limitations for pay 2027.
- PRISM 1 and PRISM 3 were due on April 1st, 2026.
 - Currently only four (4) counties still need to complete PRISM 1, and six (6) counties need to complete PRISM 3.
- As a reminder, the format for the Property Tax Calculation Exam has changed, they are now offered monthly in a proctored format.
 - As of right now there are six (6) counties that will not be property tax compliant as of January 1, 2027.
 - School Building Bond Agricultural Credit calculation has been added to the exam.

Outstanding Action Items – Laurie Clendenning, Mower County

- Lisa Meredith, MnCCC, will verify fees in the contract with Aumentum
 - Per Lisa, MnCCC, she is working on getting the 2027 fees from Aumentum.
 - There were some 2025 direct bills that were sent to Washington County that should not have been billed directly to the county, so Lisa would like everyone to have the MnCCC team review any direct bills that counties receive as we are all migrating to Platform. Direct billing to counties should be done once all counties are migrated to Platform.
- Continued discussion with MnDOR on Veterans Exclusion/Homestead updates on tax statements and valuation notices to make it obvious to those taxpayers enrolled in the program.
- Continued discussion with MnDOR regarding split class EMV on valuation notices and truth-in-taxation notices.
- Lisa Meredith, MnCCC, will verify our Quorum number.



Completed Action Items

- None at this time

Aumentum Technologies Update:

Geoff Hamilton, Aumentum Technologies

- There are currently lots of critical tickets, and they are all being actively worked on. There is a lot of urgency with the engineering team to deliver solutions for the critical items.
 - As critical tickets are being submitted, they are being pushed directly to the engineering team.
- There was general discussion on submitting tickets, do the 8.6.12 tickets need to be re-submitted for Platform?

Legislative Committee:

Jody Wagner, Rice County, no updates for tax side at this time. There are likely to be legislative changes to come. Jodie Raymond, Anoka County, stated that they hope to resume the Legislative Research Advisory Committee meetings at the end of this month, as legislative session gets closer to ending.

Kathy Howard, Roseau County, there was a release today that should be taking care of the legislative change order for the homestead data file schema changes, ticket numbers 212716 & 212664, this is for the Platform environment only. It should also be addressing the long run times for Washington County. Kurt Peterson, Aumentum Technologies, and Kathy Howard, Roseau, are still trying to get counties still on 8.6.12 environment to help test a ticket that will address the 1B/4D2 changes. Kathy Jenson, Roseau County, stated that she tried to have Managed Services load the script and instructions to address ticket 204063 today, but Managed Services stated that it is only for the 8.6.12 environment, not Platform. Kathy Howard also stated that the solution for the ticket addressing the legislative change order for Judicial Safety programming has been released, and it is for the 8.6.12 environment. Kathy Howard, Roseau County, will follow up with Aumentum Technologies.

Training Committee:

Kathy Jenson, Roseau County, reported the following:

- The training committee met on March 16th.
- There was discussion around the 2026 After TUG trainings, the consensus of the group was to hold off on the After TUG trainings for the remainder of the year, until all ten (10) counties are live on Platform.
- There was discussion on 2026 Annual Conference sessions.
- There was discussion on Platform Project Upgrade.
- Kathy feels it would be pertinent to schedule a meeting at the Annual Conference with Aumentum Technologies Upper Management, as there are several Upper Management team members that will be in attendance.

- Kathy asked Amanda Beyer-Schulte, MnCCC, to remove the After TUG training schedule on the back of the agenda.

Testing, Documentation, Standards & Reports Committee:

Jody Moran, Washington County, reported the following:

- The committee met on March 25th, the majority of the discussion was related to the Platform upgrade experience and issues
- There are some major issues that the Pilot County and Group 1 counties are experiencing.
 - The canned reports do not work, or don't work as well as they did in the 8.6.12 environment.
 - ACH functionality is not working.
 - The sheer volume of open items is outstanding.

Joe Heying, Morrison County, reported the following:

- When Joe last reviewed the Testing Reimbursement spreadsheet there are currently only four (4) testing hours being reported.
- Joe would like to have the testing reimbursement hourly rate of \$75/hour approved today, and that way the reimbursement can happen next month with the annual meeting.
 - Annalee Jones, Polk County, made a motion to approve the testing reimbursement hourly rate of \$75/hour. Jody Wagner, Rice County, made the second. The motion carried.
- Kathy Jenson, Roseau County, asked if we should start contributing more dollars to the testing fund. It is highly likely that we will be needing to utilize those funds in the near future as we all migrate to Platform.
 - The current contributions per county are \$5,000/county annually to the enhancement fund and \$2,000/county annually to the reports fund.
 - It was proposed that contributions of \$6,000/county annually for the enhancement fund and \$4,000/county annually to the reports fund be presented for approval at the annual meeting in May.

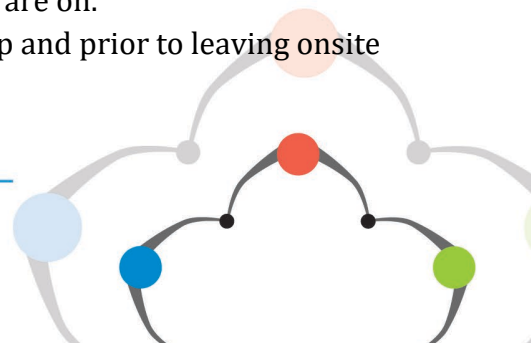
Enhancement Committee:

Jill Murray, Clay County, stated there is nothing to report at this time.

Steering Committee:

Laurie Clendenning, Mower County, reported the following:

- Lisa Meredith, MnCCC, shared a summary of her meeting with the Aumentum Team. She met with Chance Campbell, Deborah Lukens, Stacia Sichler, and Connie Jones, all from Aumentum Technologies.
 - Explanation of the single conversion and that updates and hotfixes need to be applied to get them to the same "version" the preceding counties are on.
 - The onsite team will review any open tickets as a last step and prior to leaving onsite at each county.
 - Rice County ACH needs to be a high priority.



- Washington County will have third party fees due to errors in their tax statements and correcting those should be a high priority.
- Expectation that Aumentum staff should be prepared for meetings as much as possible.
- Revisit onsite training a couple of weeks after go-live to see what needs to be revisited or needs training.
- Counties will receive an 8.6.12 ticket list from the Aumentum team that they have submitted and the counties will review after they go live and provide an update on outstanding items.
- The support team needs to be better versed on Platform to help both the 8.6.12 and the Platform counties going forward.
- Training should be reviewed in a follow up 2 to 4 weeks after the initial training is complete for feedback on "now that you are live...what additional training or refresher training do you need?"
- We did discuss that it would have been helpful to have me more involved with the IT session so that we could have made sure that all of the required members could participate. For example, Amy Middendorf from Morrison was not able to attend.
- Additional concerns were discussed as follows:
 - Rice County has expressed their need for ACH programming for a long time and have recently been told it will be available on April 1st which is too late. They were told it may be possible to get a hotfix in time for their March 31st ACH pull. Rice will not sign off on their DAS until their ACH is functioning.
 - Closed/Pending Closed Tickets – The statement was made that support tickets are being closed without verification that the issue has been resolved. Everyone is encouraged to monitor the pending closed and closed tabs of the ticket spreadsheet, test fixes as quickly as possible and notify Aumentum if a ticket needs to be reopened. Also mentioned was that Aumentum is closing 8.6.12 tickets that supposedly have been fixed by Platform - for example the disaster credit tickets. However, Platform has not been tested to verify. It was suggested that we ask for tickets that are “pending closed” to remain on the active tickets tab to avoid “out of sight, out of mind”
 - Implementation tickets – some issues that are identified during implementation are not formally added to the ticket queue. These issues tend to fall through the cracks. Aumentum seems to want the counties to track implementation issues. While we should also track them, we believe Aumentum should formalize this process and onsite Aumentum staff should review all outstanding tickets and issues with the county prior to leaving after implementation. Also, the Aumentum staff should review



- all 8.6.12 tickets submitted by that particular county and verify that Platform has resolved the problem.
- Training – training has been very high level and not as detailed as what was available for 8.6.12. Not all documentation promised is available on sharepoint and what is available for assessor tasks is incorrect.
 - Training sessions need to cover more of the differences between 8.06.12 and Platform. It would be helpful to have a “check-in” meeting approximately 2 weeks after go-live to identify needed additional training and/or documentation. It was also suggested that we attend as many training sessions as possible because discussions frequently morph into other areas and you could miss something that crosses over into your area of responsibility.
 - Another helpful practice would be for Aumentum staff to save their individual instructions to sharepoint. For example, Nicollet had an issue with current owner vs alternate taxpayer not printing on the statements correctly. Dwayne provided detailed documentation that seems to have solved the problem and may resolve an open ticket. This type of information should be available on sharepoint and communicated to all counties. Similarly, configuration and setting changes have been done on-the-fly during implementation. These changes should also be communicated to all counties and instructions posted to sharepoint.
 - Data Validation – there’s no consistent understanding of what data validation means and what we are supposed to be doing during “data validation week” Aumentum supplied the “Go-live cutover plan” which loosely lists items to test but it needs more structure and detail. The statement was also made that 1 week is not enough time for data validation because a) if any errors are found, there’s not enough time to correct them prior to go-live and b) you’re also struggling to get all your work caught up to date before “pencils down” on Thursday. True side-by-side testing can only be done Saturday and Sunday just prior to go-live. It was suggested to have Managed Services refresh test on Thursday immediately after pencils down and to spend Friday running reports from 8.06.12 which can be compared to Platform.
 - Finally, a brief discussion was had over payment of invoices. It was agreed that all invoices should be brought to the user group for approval before payment.

Thank you Lisa for speaking on our behalf and facilitating the meeting!

It was also discussed that Group 2 counties have been instructed by the Aumentum team to put tickets in through Team Support for everything that comes up. Clay County and Morrison County have both established internal training plans and spreadsheets to track progress.

Contract Committee:

Lisa Meredith, MnCCC, stated there is nothing to report at this time.

MnCCC Liaison Report:

Jody Moran, Washington County, reported the following:

- The Board met on March 12th
- Financials
 - Board made a motion to recommend the proposed 2027 budget at region and membership meetings
- Contract Advisory Panel (CAP) Update
 - Guidelines for Vendor Contracts have been reviewed, and MnCCC's attorney will provide 90-minute training and overview of the changes
- MnCCC Update
 - Emily is working on Q1 RSVP enhancements for release later in March
 - Women in Government event was held on March 6. 92 attendees and 3 speakers
 - Conference planning
 - The New Officer Prep session was held on March 19 at 1:00 pm to meet with potential new officers and hopefully encourage new folks to volunteer
 - Governance documents were submitted for approval by the Board at the March meeting
 - User Group Rules and Regulations have been reviewed for changes to be shared with User Groups at their annual meetings
 - Jonathan and Lisa are working with all the User Groups on their fee schedules for 2027 for approval at the annual meetings
 - Amanda is reviewing the website to offer recommendations for updates to comply with the Title II ADA requirements by April 2026.
 - Jonathan and Lisa are working on insurance comparison and audit and looking at options for coverage changes.
 - Annual Region Meetings to be held on Monday, April 27 at 10:00 am. Recommendation to potentially make changes to the Bylaws to no longer require annual regional meetings
- Other Business
 - The Board approved changes to the Expense Reimbursement Policy
 - The Bylaws and JPA changes were reviewed. The Personnel Policy and Board Handbook will come to the April meeting. All documents will be ready for the annual conference.
- Next meeting: Thursday, April 9th, 2026 at 9:30 am – Hybrid (MnCCC & Zoom)

ISSG Liaison Report:

Amanda Beyer-Schulte, MnCCC, reported the following:

- The April 1st AI discussion/workshop was a great success and MnCCC has received a lot of positive feedback.
 - There was around one hundred (100) attendees and it was a mix of County and City employees
- ISSG will meet twice in May, once for a regular meeting and once for an annual meeting at the Annual Conference.
- ISSG is partnering with MNCITLA for IT training and software outreach.
- At the MnCCC Annual Conference, MN Bureau of Criminal Apprehension (BCA) will be hosting a security session, and we encourage folks from all departments to attend!
- After the annual conference ISSG will begin planning their Halloween Cyber Security event.

Other Business

As a reminder, at our annual Tax User Group meeting in May we will need to elect a new Recording Officer, as well as a new Vice Chair to the Tax User Group.

Laurie Clendenning, Mower County, would really like to encourage participation from all counties! Please reach out to any User Group officer or Lisa Meredith at MnCCC if you are interested in participating.

Meeting adjourned at 11:20 am.

Next Meeting: May 19, 2026, at 9:30 am – Annual Tax User Group Meeting – MnCCC Annual Conference

Respectfully submitted by Annalee Jones, Polk County
annalee.jones@polkcountymn.gov

