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# Duplicate Homestead Data Submission for 2020

Manual

3/1/2020

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## Overview

This manual is for the 2020 Duplicate Homestead data submissions to the Minnesota Department of Revenue as required by [statute](#). The Property Tax Refund (PTR) submissions are a separate process. The PTR Homestead manual is available at the [Homestead location](#) on the Revenue website.

These instructions cover what to include in the real property (RP) Duplicate Homestead data file and separate manufactured housing (MH) Duplicate Homestead data file. For more information on Homestead file submission process and common submission errors, see [How to Submit Your Homestead file](#).

Duplicate Homestead data filing uses a specified virtual room for Duplicate Homestead data submission. Any attempt to load a Homestead data file into any other submission room will fail and result in an error/failed submission. For general information on Virtual Room file submissions, see [VR File Submission Overview](#).

**Homestead data is protected data.** Social Security numbers are included in this data. **Never** send homestead data through e-mail. **Never** upload homestead data to any room except the designated homestead submission room.

In this document, XML elements are referred to without their namespaces for readability. For example, the <mnr-ptx:HomesteadTypeCode> is described here simply as <HomesteadTypeCode>. There are five separate namespaces used in the homestead schemas:

mn	State-level elements
mnr	Department of Revenue elements
mnr-ptx	Property Tax Division elements
u	Universal National Information Exchange Model elements
c	Common National Information Exchange Model elements

## Changes for 2020

The assessment year is 2020. The schema version is 2020a. There are no schema changes for 2020.

The “Non-Occupying Spouse Indicator” field is now described as “Occupying Owner with a Non-Occupying Spouse Indicator” in the Glossary on page 6. This provides better clarity for its purpose, and to help counties comply with [statute](#).

## Important Notes – Please Read

- For any questions or to receive invitation/access to join the Duplicate Homestead submission virtual room, please e-mail the Homestead mailbox at [homestead.match@state.mn.us](mailto:homestead.match@state.mn.us).
- To receive an invitation/access to the Duplicate Homestead **testing** room, please e-mail the Homestead mailbox at [homestead.match@state.mn.us](mailto:homestead.match@state.mn.us).
- The Duplicate Homestead data files must contain <Homesteaders> data for Assessment Year 2020 and should reflect ownership as of January 2, 2020. Do not include mid-year homesteads.
- Duplicate Homestead data files will not be accepted prior to March 1, 2020.
- **Do not submit test files to the regular Homestead submission rooms.** There are submission testing rooms to test your data. Any files submitted in the regular submission rooms will be treated as production data.
- Real property (RP) data and manufactured home (MH) data must be separated. Submit two data files for Duplicate Homestead. Use XML <HomesteadDocumentTypeCode> to identify the separate files.
- If there are no MH homesteads in your county, please contact the Homestead unit at [homestead.match@state.mn.us](mailto:homestead.match@state.mn.us). In this case, a MH file is not needed. If you do not inform us, we will expect both RP and MH submissions.
- If you have a very large data file, do **not** break it into smaller submissions. Virtual rooms can accept large data files.
- Data files must be zipped before submission. Unzipped data files cannot be accepted in submission rooms. Do not zip data files more than once. Zip the data file only, not the folder that holds it.
- Assign one clear name to the data file and the zip file that encloses it. The name should include county, Duplicate (Dup), real property (RP) or manufactured housing (MH), and assessment year. The file should be identifiable by its name. Example: “Co 99 Homestead RP Dup AY 2020”.
- Make sure to use the appropriate submission room before submitting any files. Confirm your files have achieved “Complete” status in submission room.
- If you have successfully submitted a Duplicate file and wish to replace it, **you must obtain approval from Revenue** before resubmission. Contact the Data and Analysis unit with a request by emailing [homestead.match@state.mn.us](mailto:homestead.match@state.mn.us).
- A county can designate any county staff person to submit Duplicate Homestead data. Contact us at [homestead.match@state.mn.us](mailto:homestead.match@state.mn.us) to request a county staff person join a submission room.
- The Duplicate Homestead report is placed in each county’s Duplicate Homestead virtual room. **Only the County Assessor has access to the Duplicate Homestead virtual room.**
- The Duplicate Homestead contact list is located in the Assessor Reference virtual room. This list is maintained by counties.
- The data from the Duplicate files is used to construct the invalid/duplicate SSN/ITIN reports that will be distributed to the counties by November 1, 2020.

## General Guidelines

Please refer to [M.S. 273.124, Subd. 13a and 13b](#) for the statutory description of the Duplicate Homestead process.

## Assessment/Payable Years

Duplicate Homestead files must contain the assessment year 2020.

## Parcels to Include / Not Include

Duplicate homestead data must include all base homestead parcels located in the county. For homesteads that extend across counties, each county should only report the base parcel located in their county.

For homesteads with multiple parcels within your county, only report the base parcel.

Use element <ParcelHomesteadBaseIndicator> to identify the base parcel (true).

## Homesteaders to Include / Not Include

An owner's spouse must be reported by name and SSN/ITIN. CR-H Homestead Application requires a spouse's information be provided.

Use data element, <HomesteadNonOccupyingSpouseIndicator> and options "true" or "false".

The person who lives there and has a non-occupying spouse will have this value for the indicator:

<HomesteadNonOccupyingSpouseIndicator>true<

The non-occupying spouse of this person would have this value for that indicator:

<HomesteadNonOccupyingSpouseIndicator>>false<

All qualified homesteaders must be reported. Create a separate <homesteader> element for each of the following as reported on the homestead application:

- Occupying owner
- Occupying spouse of an owner
- Non-occupying spouse of an occupying owner
- Occupying qualifying relative
- Occupying spouse of a qualifying relative
- Non-occupying spouse of a qualifying relative

## Relative Homesteads

Report relative homesteads with owner-occupied homesteads.

The <Homestead100PercentRelativeIndicator> element is provided for you to report if the homestead is occupied entirely by a relative. This element should be false if an owner also occupies the property and has claimed homestead along with the relative. When an owner is occupying the property, the owner is eligible for a property tax refund, but a homestead occupied only by a relative is not eligible.

## Manufactured Homes (Manufactured Homes Classified as Personal Property)

Manufactured homes which do not meet the criteria for real property are classified as personal property. In these cases, data must be submitted in a separate MH file from RP homesteads. <HomesteadTypeCode> for personal property manufactured home homesteads is "manufactured-home."

## Actively Farming Agricultural Homestead

<HomesteadTypeCode> of “actively-farming” may be used in place of “agricultural,” or “agricultural” with a note “actively farming” may be reported in <ParcelNoteText>.

## Optional Elements

PDF version of the graphical schema indicates optional elements with a dashed box around the element name.

## Market Values and Tax Amounts

Report tax amounts as dollars and cents; report market values as whole dollars. Do not include dollar signs or commas. Do include the decimal point if data includes dollars and cents.

## File Organization and Cardinality

The schema defines XML tags or names of data elements included in the file. Data elements must follow the organizational pattern described by the schema.

Cardinality describes number of occurrences of a variable.

Different types of cardinality used for homestead files are as follows:

- **Zero-to-one or zero-to-many:** minimum number of occurrences is zero or any time a variable is optional.
- **One:** One occurrence must be provided. This is the default cardinality.
- **One-to-many:** One occurrence must be provided but an unlimited number of occurrences are allowed.
- **One-to-two:** One occurrence must be provided but not more than two occurrences.
- **Two:** Two occurrences must be provided.

# Glossary with Instructions

Data elements are bold. Associated XML tags are in brackets. Brief descriptions are included.

**Homestead File** <HomesteadRecordsDocument>

Same as 2019

**Meta Data** <MetaData>

Set of elements describing contents of the file or document

**Homestead Schema Version** <HomesteadschemaVersionText>

Identifies the version of the schema. 2020 submissions must use “2020a”

**Homestead Schema Correction** <HomesteadschemaCorrectionText>

OPTIONAL: An optional element used only as directed in the event of incorrect schemas

**Homestead Document Type** <HomesteadDocumentTypeCode>

Identifies type of transmitted XML document. For Duplicate Homestead data filing, the value of this element should be one of the following codes:

- duplicate-homestead-real-personal  
Duplicate Homestead File containing all real property homestead records
- duplicate-homestead-manufactured-home  
Duplicate Homestead File containing only MH homestead records

**County Code ID** <MNCountyID>

Two-digit numeric identifier of a Minnesota county assigned sequentially according to alphabetical order of all counties

**Homestead Record** <CountyHomesteadRecord>

Cardinality: One-to-many

Application and associated property tax data for each homestead. Each record in the file will describe a homestead, not a specific parcel or person. One or more homesteaders and one or more parcels may be associated with a homestead, but the unit of each record is homestead.

**Assessment Year** <PropertyTaxAssessmentYear>

Year the value of a property is established. For both RP and MH Duplicate Homestead data, the assessment year is 2020.

**All Homesteaders** <Homesteaders>

Individual(s) granted homestead for property tax purposes. Notes beginning and end of the full list of homesteaders

**Each Homesteader** <Homesteader>

Cardinality: One-to-many

Individual granted homestead for property tax purposes

**Names**

There are two methods to list names:

- **Preferred method**
  - **Person Name** <PersonName>
  - **Last Name** <PersonSurName>
  - **First Name** <PersonGivenName>
  - **Middle Name** <PersonMiddleName> OPTIONAL
- **Alternative method**
  - **Full Name** <PersonFullName>

### **Social Security Number (SSN) / Individual Tax Identification Number (ITIN)**

Homesteaders are identified by SSN, ITIN, or SSN with trailer digit. Report social security numbers in the SSN field. Report ITINs in the ITIN field. **Do not enter an SSN into the ITIN field or an ITIN into the SSN field.**

- **Primary method:**
  - **Person Social Security Number** <PersonSSN> SSN
  - **Social Security Number** <PersonSSNID>  
Homesteader's SSN. **Do not include dashes.**
  - **Social Security Trailer Digit** <PersonSSNTrailerID> OPTIONAL  
Sequence number added as a suffix to a social security number to associate an individual to another person. An SSN followed by a trailer digit maybe used on a homestead application.
- **Alternative method:**
  - **Taxpayer ID** <PersonTaxpayerID>  
Homesteader's ITIN. **Do not include dashes.**

### **Occupying Owner with a Non-Occupying Spouse Indicator** <HomesteadNonOccupyingSpouseIndicator>

Counties must report all non-occupying spouses as individual homesteaders in Homestead data.

### **Contact Address** <ContactAddress>

Address for a person granted homestead. There are two methods to list the address:

- **Preferred method**
  - **Address** <Address>
  - **Street Address** <StreetFullText>
  - **City Name** <LocationCityName>
  - **State** <State>
  - **State FIPS Code**<LocationStateFIPS5-2AlphaCode> 2-digit numeric FIPS code
  - **State** <LocationStateName> official two-letter postal code
  - **Zip Code** <LocationPostalCodeID>
  - **Country Name** <LocationCountryName> OPTIONAL
- **Alternative method**
  - **Address Full Text** <AddressFullText> A complete address

### **Homestead Type** <HomesteadTypeCode>

Specifies type of homestead. "Manufactured-home" is only used in MH Duplicate data submission. Valid type codes:

- actively-farming
- agricultural
- non-agricultural
- manufactured-home



**100% Relative Homestead Indicator** <Homestead100PercentRelativeIndicator>

Indicates a homestead is entirely a relative homestead. A homestead with partial relative must have a value of false.

**Cross County Homestead Indicator** <HomesteadCrossCountyIndicator>

Indicates a homestead involving parcels in multiple counties. Only base parcels should be reported in Duplicate Homestead file.

**Parcel Identification Number** <ParcelID>

Parcel’s identifier, referred to as a PID or PIN

**Unique Taxing Area** <UniqueTaxingArea>

IDs identifying unique taxing areas (a geographic area subject to the same set of tax rates) for the parcel

**County Code ID** <MNCountyID>

Two-digit numeric identifier of a county assigned in alphabetical order of Minnesota counties

**City/Town ID** <MNCityTownID>

Four-digit numeric ID for townships and cities. Townships begin with two leading zeros. Cities end with two zeros.

**School District ID** <MNSchoolDistrictID>

Four-digit numeric ID assigned to school districts by Revenue. A leading zero is added to the ID provided by the Minnesota Department of Education for independent school districts. The following identifiers are assigned to special and common school districts and some metropolitan airports:

<i>Revenue-Assigned School Districts for &lt;MNSchoolDistrict&gt;</i>		
<b>ID</b>	<b>School District</b>	<b>County</b>
0950	MSP International Airport	Hennepin
0951	St. Paul Airport	Ramsey
0991	Special School District #1	Hennepin
0993	Common School District #323	Chisago
0996	Special School District #6	Dakota
0998	Common School District #815	Kandiyohi

**Subcode ID** <UniqueTaxingAreaSubID>

Number assigned to geographic areas that have the same county, city/township, and school district but different tax rates

**Parcel Address** <MNParcelAddresses>

**Address of Property** <MNParcelAddress>

Cardinality: One-to-many

- **Preferred method:**
  - **Address** <Address>
  - **Street Address** <StreetFullText>
  - **City Name** <LocationCityName>
  - **Zip Code** <LocationPostalCodeID>
- **Alternative method:**
  - **Address Full Text** <AddressFullText> complete address

**Base Parcel Indicator** <ParcelHomesteadBaseIndicator>

Indicates parcel is a base parcel for one or more linked homestead parcels. This indicator should be “true” for any parcel included in the Duplicate Homestead data. If it were “false” the parcel should not be included.

**Optional Parcel Descriptors** <ParcelNoteText> OPTIONAL

Cardinality: One-to-many

Note or remark associated with a parcel to use in resolving duplicates, i.e. flag splits, combines, or any other meaningful descriptor.

**Total EMV** <HomesteadTotalEstimatedMarketValueAmount>

Total estimated market value of a homestead. For homesteads linked across counties, includes value of all parcels in all counties linked to the homestead.

**Total TMV** <HomesteadTotalTaxableMarketValueAmount>

Total taxable market value of a homestead. For homesteads linked across counties, includes value of all parcels in all counties linked to the homestead.