STATE OF INDIANA

DEPARTMENT OF LOCAL GOVERNMENT FINANCE

INDIANA GOVERNMENT CENTER NORTH
100 NORTH SENATE AVENUE N1058(B)
INDIANAPOLIS, IN 46204
PHONE (317) 232-3777
FAX (317) 974-1629

TO: **County Assessors, County Auditors, and County Treasurers**

CC: **Software Vendors**

FROM: **James A. Johnson, Director of Data Analysis**

RE: **50 IAC 26 Phase III Software Testing**

DATE: **December 10, 2019**

The purpose of this memorandum is to provide further guidance on the 50 IAC 26 Phase III local certification and validation software testing.

As referenced in the 50 IAC 26 testing memo from January 30, 2018, Phase III local certification and validation testing involves each county submitting to the Department of Local Government Finance ("Department") its proposed property tax management system ("system") and the Department verifying that the county's proposed system meets the standards and requirements contained in 50 IAC 26. To be considered for Phase III local certification, the individual assessment and tax and billing modules of a county's proposed system must have first successfully demonstrated and have been certified under Phase I and Phase II testing. The Department will not consider any system for local certification at the county level that has not first been Phase I and Phase II certified. Like the previous round of Phase III certification testing in 2015, the Department will conduct the testing, and counties will not need to hire a third-party tester to have their systems certified and validated during Phase III certification.

In December 2019, the Department will be contacting all county assessors and county auditors with a survey that will need to be completed. This survey will ask the county assessors and county auditors to select the software vendor company and software package name and version of each module of the county's proposed system. The modules subject to testing are CAMA, personal property, sales disclosure, oil & gas, and tax & billing. The Department is aware that not all counties will have an oil & gas module as part of their system. Additionally, the survey will ask the county assessors and county auditors to indicate their preference between an onsite visit and a Department-hosted webinar session for Phase III testing. Upon receipt of this information, the Department will review the county's proposed system and verify that it has been Phase I and Phase II certified according to the requirements of 50 IAC 26. The Department will then follow-up with the county to schedule a date for a local testing session. The timeframe for Phase III testing is January 1, 2020 – June 30, 2020.

The Department tentatively plans to allocate roughly two hours to conduct Phase III local testing for each county. The local testing session will consist of the Department testing evaluator asking

county users to demonstrate compliance in five testing areas. The testing scenarios that will be used during the local testing session are attached to this memo. This information may also be found on the Phase III Local Certification and Validation webpage under the "50 IAC 26" section. Counties should note that the testing scenarios included in the Phase III certification will have also been successfully demonstrated by the individual software vendors during Phase I testing. Please note that the testing areas and scenarios identified are subject to change at the Department's discretion. While the Department anticipates few, if any changes, to the test areas and scenarios after the release of this memo, the most current version of the test areas and scenarios may be found at the Phase III Local Certification and Validation webpage identified above.

In preparation for the local testing session, the Department will coordinate with each county to identify a date and time for the testing evaluator to conduct Phase III testing with the assessor's office and the auditor's office. Please note that, due to the logistics of trying to schedule sessions for all 92 counties, the Department evaluator will plan to conduct Phase III testing with both the assessor's office and the auditor's office on the same day. The applicable software vendors are welcome to participate in the local testing sessions, but the Department is not requiring vendor participation. Furthermore, in terms of the preference between an onsite visit and a Department-hosted webinar, the Department would like to emphasize that both the assessor's office and the auditor's office must be in agreement. In other words, the Department will not be conducting an onsite visit with one office and a separate webinar session with the other office for the same county. It is the preference of the Department to conduct Department-hosted webinars as opposed to an onsite visit. If you would like more information on how a Department-hosted webinar will be conducted, please contact James Johnson. If your county chooses a Department-hosted webinar, the Department will distribute specific, step-by-step instructions for "day-of" procedures.

Upon conclusion of the local testing session, the Department evaluator will review the information gathered during the testing session and will follow up with both offices with a summary of the tests conducted. Assuming that all tests have been successfully demonstrated in compliance with the standards and requirements of 50 IAC 26, the Department will issue an official certification to the county, stating that the county's proposed system has been locally certified and validated. **In accordance with 50 IAC 26-18-1(c), all counties must have their systems locally certified and validated by no later than July 1, 2020.**

If you have any questions regarding this information, please feel free to contact the Director of Data Analysis James Johnson at jjohnson@dlgf.in.gov or (317) 234-8274.