

## Phase II Test Results

*The "x" shown in the Oil/Gas to Tax & Bill, CAMA to Tax & Bill, Pers Prop to Tax & Bill, and Sale Disclosure to CAMA columns means that a particular test and/or file pertain to that particular module pairing of the property tax management system*

Test	Oil/Gas to Tax & Bill	CAMA to Tax & Bill	Pers Prop to Tax & Bill	Sales Disclosure to CAMA	Results
<b>Test Area 1: Annual Interface of Values (i.e., "Roll and Balance")</b>					
<b>Purpose:</b> Perform an annual update of the rolling of certified gross assessed values from the county assessor to the county auditor by completing the tests shown below. Demonstrate that the property tax management system can perform functions across sub-systems without requiring users to manually re-key data. <50 IAC 26-15, 50 IAC 26-18-3>					
<b>Please note:</b> <i>If annually assessed mobile home records are housed in the vendor's CAMA system, these tests for mobile home records will be demonstrated during the CAMA to Tax &amp; Bill testing. If annually assessed mobile home records are housed in the personal property assessment system, these tests for mobile home records will be performed during the personal property assessment system to Tax &amp; Bill testing.</i>					
<b>Tests:</b>					
1. Assuming the scenario where the county assessor has completed the process of calculating the gross assessed values for Pay 2020, from the assessment system, generate the Pay 2020 interface files (e.g., PARCEL, PERSPROP, OILGASALL, MOBILE) that will be rolled to the county auditor's tax and billing system.	x	x	x		C
2. From the assessment system, generate a roll report, which summarizes the gross assessed values being interfaced by state assigned taxing district.	x	x	x		C
3. Demonstrate that the tax and billing system can import the data correctly from the interface file(s) via a programmed interface.	x	x	x		C
4. From the tax and billing system, generate a balance report, which summarizes the gross assessed values being interfaced by state assigned taxing district so that the user can verify that the certified gross assessed values rolled correctly from the assessment system.	x	x	x		C
5. In the tax and billing system, access a sample of records at the testing evaluator's discretion that were included in the interface process and demonstrate the tax and billing system has correctly categorized the gross assessed values by the various allocation categories (e.g., 1% homestead land, 2% non-homestead residential improvement, 2% farmland, etc.)	x	x	x		C
6. In the tax and billing system, demonstrate that the system reviews real property records to check for an indicator of homestead standard deduction eligibility by the following: Verify that if the records are homestead eligible and classified in the one percent (1%) tax cap in the CAMA system, the land and improvements for the records remain in the one percent (1%) tax cap in the tax and billing system. Verify that if the records are not eligible and classified in the one percent (1%) tax cap in the interface files, the land and improvements for the records will be reallocated to the two percent (2%) tax cap in the tax and billing system.		x	x		C
7. In the tax and billing system, after the certified gross assessed values for Pay 2020 have been interfaced and locked, demonstrate that the system prevents county officials from executing another roll of the certified gross assessed values for the same year without approval from the DLGF, as monitored and enforced by the tax and billing vendor.	x	x	x		C

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8. Assume that the Department has authorized a "re-roll" of certified gross assessed values for Pay 2020. Demonstrate that the functionality exists for the software vendor to replace the originally rolled values with updated gross assessed values. Generate updated roll and balance reports from the assessment and tax and billing systems upon completion of the approved "re-roll."	x	x	x	

Results
C

### Evaluator Observations

- 1) Vendor demonstrated this test in a compliant manner with the specified requirement.
- 2) Vendor demonstrated this test in a compliant manner with the specified requirement. Upon reviewing the roll and balance reports that were generated from the assessment system and tax and billing system as part of Test 2 and Test 4 in this test area, the testing evaluator noticed that were discrepancies in gross AVs between the systems for real property in the Arcadia Taxing District and Sheridan Taxing District. The testing evaluator followed up with both vendors for additional feedback. Based on the feedback, the discrepancies were due to an issue of timing when staging the test data in the vendors' separate individual databases - a scenario which would not be likely in a live production environment. As such, the discrepancies were not due to any systematic errors between the systems but rather were attributable to a timing difference.
- 3) Vendor demonstrated this test in a compliant manner with the specified requirement.
- 4) Vendor demonstrated this test in a compliant manner with the specified requirement. Upon reviewing the roll and balance reports that were generated from the assessment system and tax and billing system as part of Test 2 and Test 4 in this test area, the testing evaluator noticed that were discrepancies in gross AVs between the systems for real property in the Arcadia Taxing District and Sheridan Taxing District. The testing evaluator followed up with both vendors for additional feedback. Based on the feedback, the discrepancies were due to an issue of timing when staging the test data in the vendors' separate individual databases - a scenario which would not be likely in a live production environment. As such, the discrepancies were not due to any systematic errors between the systems but rather were attributable to a timing difference.
- 5) Vendor demonstrated this test in a compliant manner with the specified requirement.
- 6) Vendor demonstrated this test in a compliant manner with the specified requirement.
- 7) Vendor demonstrated this test in a compliant manner with the specified requirement.
- 8) Vendor demonstrated this test in a compliant manner with the specified requirement. The same feedback referenced above in Test 2 and Test 4 pertains to this test, as well.

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Test	Oil/Gas to Tax & Bill	CAMA to Tax & Bill	Pers Prop to Tax & Bill	Sales Disclosure to CAMA	Results
Test Area 3: Tax & Bill to CAMA Integration					
Purpose: Demonstrate that the property tax management system can perform functions across sub-systems without requiring users to manually re-key data. <50 IAC 26-15, 50 IAC 26-18-3>					
Vendors: Perform the tasks listed immediately below in advance of demonstrating the Tax and Bill to CAMA Integration tests. The Integration tests will then examine the results after these actions have been executed. Additionally, the testing evaluator may ask vendors to perform these actions more than once.					
Tests:					
1. In the tax and billing system, enter an adjustment of the Pay 2020 assessed value to a real property parcel based on an allowable change as referenced in 50 IAC 26-14-2. Demonstrate that the tax and billing system prevents the user from changing or removing the certified gross assessed value of the property. Demonstrate that the tax and billing system allows for the change to be processed by creating a separate posting for the updated value.		x			C
2. In the tax and billing system, change the mailing address associated with a real property record for Pay 2020.		x			C
3. In the tax and billing system, perform property splits effective Pay 2021.		x			C
4. In the tax and billing system, perform a property combination on two eligible existing parcel records effective Pay 2021. Demonstrate that users may still access transactional history and characteristics of the two original parcels prior to the combination, including the certified gross assessed values and certified net assessed values, for at least two years prior to Pay 2021 in the tax and billing system.		x			C
5. In the tax and billing system, perform a transfer of ownership on a real property record for Pay 2021.		x			C
6. In the tax and billing system, deactivate a real property record.		x			C
7. In the tax and billing system, add a standard homestead deduction to a real property record as requested by the evaluator.		x			C
8. Create and run required integration files that will take the data created in the above tasks and integrate it with the other systems of the property tax management system. In other words, changes that originated in the tax and billing system, should integrate the data into the CAMA system.		x			C
Tests after Integration File has been imported:					
1. Changes to Owner and Billing Data		x			C
For any change of mailing address made to a real property record, demonstrate that:		x			C
a. The updated information made in the tax and billing system for the parcel appears within the assessment system.		x			C
b. Necessary adjustments can be made to the parcel by users in the assessment system before changes are implemented. The system must allow users to view, accept, and make any necessary adjustments before choosing to process the data. If records have not been attended to in the system before the next iterative update from the tax and billing system, the records that have not been approved or edited must be displayed with the next iterative update's changes until they have been accepted or edited.		x			C

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c. The previous mailing address information associated with the record has not been changed for the prior years in the assessment system.		x		
2. Property Split and/or Deactivation		x		
For a property split performed on a real property parcel, demonstrate that:		x		
a. The newly created or deactivated parcel appears within the assessment system and that necessary adjustments can be made to the updated name or address data by CAMA users before the split is implemented.		x		
3. Property Combination		x		
For a combination performed on two eligible existing real property parcels, demonstrate that:		x		
a. The newly created parcel appears within the assessment system and that necessary adjustments can be made to the newly created parcel by users.		x		
b. Users may still access transactional history and characteristics of the two original parcels prior to the combination, including the certified gross assessed value, for at least two years prior to Pay 2021 in the assessment system.		x		
4. Adjustment of Real Property Assessed Value		x		
For the adjustment of assessed value to a real property parcel, demonstrate that:		x		
a. The CAMA system creates a separate posting with the modified data and does not overwrite the certified gross assessed value. The CAMA system must store: (1) the certified gross values as rolled; (2) the current value in the assessment system as adjusted by the assessor and that corresponds to the "Current AV" values in the PARCEL file; and (3) the most recent assessed value allocation from the tax and billing system.		x		
5. Application of Standard Homestead Deduction		x		
a. For a new homestead deduction in a new filing, demonstrate that the CAMA user is prompted if a homestead deduction is processed on a parcel that does not currently have an assessed value allocation to a 1% land and 1% improvement.		x		

Results
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### Evaluator Observations

#### Test Performed in the Tax and Billing System Prior to Integrating the Data in the Assessment System

- 1) Vendor demonstrated this test in a compliant manner with the specified requirement.
- 2) Vendor demonstrated this test in a compliant manner with the specified requirement.
- 3) Vendor demonstrated this test in a compliant manner with the specified requirement.
- 4) Vendor demonstrated this test in a compliant manner with the specified requirement.
- 5) Vendor demonstrated this test in a compliant manner with the specified requirement.
- 6) Vendor demonstrated this test in a compliant manner with the specified requirement.

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7) Vendor demonstrated this test in a compliant manner with the specified requirement.				
8) Vendor demonstrated this test in a compliant manner with the specified requirement.				
<b><u>Test Performed in the Assessment System After Integrating the Data from the Tax and Billing System</u></b>				
1) Vendor demonstrated this test in a compliant manner with the specified requirement.				
2) Vendor demonstrated this test in a compliant manner with the specified requirement.				
3) Vendor demonstrated this test in a compliant manner with the specified requirement.				
4) Vendor demonstrated this test in a compliant manner with the specified requirement.				
5) Vendor demonstrated this test in a compliant manner with the specified requirement.				

<b>Results</b>
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Test	Oil/Gas to Tax & Bill	CAMA to Tax & Bill	Pers Prop to Tax & Bill	Sales Disclosure to CAMA
<b>Test Area 4: Assessment to Tax &amp; Bill Integration</b>				
<b>Purpose:</b> Demonstrate that the property tax management system can perform functions across sub-systems without requiring users to manually re-key data. <50 IAC 26-15, 50 IAC 26-18-3>				
<b>Vendors:</b> Perform the tasks listed immediately below in advance of demonstrating the Assessment to Tax and Bill Integration tests. The Integration tests will then examine the results after these actions have been executed. Additionally, the testing evaluator may ask vendors to perform these actions more than once.				
<b>Tests:</b>				
1. In the assessment system, enter an adjustment of Pay 2020 assessed value to a property record based on an allowable change as referenced in 50 IAC 26-13-2. Demonstrate that the assessment system prevents the user from changing or removing the certified gross assessed value of the property. Demonstrate that the assessment system allows for the change to be processed by creating a separate posting for the updated value.	x	x	x	
2. In the assessment system, enter the necessary information for a property record actively under appeal for Pay 2020.		x	x	
3. Create and run required integration files that will take the data created in the above task and integrate it with the other systems of the property tax management system. In other words, appeals data entered in the assessment system should integrate the data into the tax and billing system. <i>The results from Test 1 do not need to be integrated into the Tax and Billing System; rather, Test 1 is simply verifying the functionality prescribed in 50 IAC 26-13-2.</i>		x	x	
Once the data has been integrated into the tax and billing system, perform the following in the tax and billing system: Run through the process of certifying net assessed values and calculating taxes for Pay 2020.		x		
<b>Tests after Integration File has been imported and the tests immediately above have been performed:</b>				
1. Appeals Data Integration		x	x	
a. For any property record that is marked as actively under appeal, demonstrate that the tax and billing system shall include a display of the amount of calculated Pay 2020 tax liability that the taxpayer is to pay to avoid being assessed any delinquent penalties		x	x	
b. Process a payment in the amount of the calculated Pay 2020 tax liability as referenced immediately above and verify that the tax and billing system does not apply any delinquent penalties to the record		x	x	

Results
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Evaluator Observations
<b>Test Performed in the Assessment System Prior to Integrating the Data in the Tax and Billing System</b>
1) Vendor demonstrated this test in a compliant manner with the specified requirement.
2) Vendor demonstrated this test in a compliant manner with the specified requirement.

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<p>3) Vendor demonstrated this test in a compliant manner with the specified requirement.</p> <p><b><u>Test Performed in the Tax and Billing System After Integrating the Data from the Assessment System</u></b></p> <p>1) Vendor demonstrated this test in a compliant manner with the specified requirement.</p>				

<b>Results</b>
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<b>Test Area 5: Reporting Capabilities in the Property Tax Management System</b>				
<b>Purpose:</b> Determine whether the property tax management system enables operators to perform user-defined reporting operations across its sub-systems (e.g., across the assessment and tax and billing systems). <50 IAC 26-10-1, 50 IAC 26-11-1, 50 IAC 26-18-3>				
<b>Tests:</b>				
1. Generate from the tax and billing system a report - or series of reports - identifying mismatches and inconsistencies between the CAMA system and the tax and billing system. Report(s) must identify at least the following:		x		
a. Real property that appears in one system and not in the other.		x		
b. Real property that have name fields that do not match the CAMA system.		x		
c. Real property that have property or billing property address fields that do not match the CAMA system.		x		
d. Any differences between the current values from the CAMA system, as extracted in the real property assessment files, and the current values from the tax and billing system - inclusive of differences in AV allocation categories.		x		
2. Generate a report from both the CAMA and the tax and billing system on all parcels with an active homestead without an assessed value allocation to a 1% bucket.		x		
3. Generate the Department-prescribed lock modification tracking document from the tax and billing system and verify that any allowable changes made during the previous test areas are reflected in the document.		x		

Results
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C

<b>Evaluator Observations</b>
1) Vendor demonstrated this test in a compliant manner with the specified requirement.
2) Vendor demonstrated this test in a compliant manner with the specified requirement.
3) Vendor demonstrated this test in a compliant manner with the specified requirement.



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<b>Test Area 6: Creation and Exporting of Files</b>					
<b>Purpose:</b> Demonstrate the property tax management system's ability to export all state specified data in the format required under this article. <50 IAC 26-18-3, 50 IAC 26-20, 50 IAC 26-21>					
<b>Tests:</b>					
1. Create the following files for the Department. The software system required to generate each file is listed in parentheses.					
a. PARCEL		x			C
b. LAND		x			C
c. IMPROVE		x			C
d. DWELLING		x			C
e. BUILDING		x			C
f. BLDDETL		x			C
g. APPEAL		x			C
h. SALEDISC				x	
i. SALECONTAC				x	
j. SALEPARCEL				x	
k. PERSPROP			x		
l. POOLDATA			x		
m. APPEALPP			x		
n. MOBILE		x	x		
o. APPEALMH		x	x		
p. OILGAS	x				
q. OILGASALL	x				
r. TAXDATA	x	x	x		C
s. ADJMENTS	x	x	x		C
As it pertains to the three SALE files listed above, demonstrate that the sales disclosure system can correctly extract sales disclosure data on a weekly basis for upload into the Gateway SDF portal. The extract should contain any new or edited sales disclosure filing since the last upload to the Gateway SDF.				x	

### Evaluator Observations

1) Vendor demonstrated this test in a compliant manner with the specified requirement.