

# Phase II Test Results

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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> 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 & 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 & Bill testing.					
<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
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Evaluator Observations
<p>1) Vendor demonstrated this test in a compliant manner with the specified requirement.</p> <p>2) Vendor demonstrated this test in a compliant manner with the specified requirement.</p> <p>3) Vendor demonstrated this test in a compliant manner with the specified requirement.</p> <p>4) Vendor demonstrated this test in a compliant manner with the specified requirement.</p> <p>5) Vendor demonstrated this test in a compliant manner with the specified requirement.</p> <p>6) Vendor demonstrated this test in a compliant manner with the specified requirement. During the follow-up day of testing, the software vendor demonstrated that the user interface in the personal property assessment system shows the 1%-2%-3% AV allocation for annually assessed mobile home records, as well as the 1%-2%-3% AV allocation for the annually assessed mobile home records as they are reflected in the tax and billing system. This updated display on the user interface allows the user to see the scenario that if an annually assessed mobile home is assessed under the 1% AV in the personal property assessment system but does not have a homestead deduction filed on it in the tax and billing system, the 1% AV gets shifted down to the 2% AV in the tax and billing system. During the initial day of testing, the value of the annually assessed mobile home - as determined by the county assessor's office - was displayed only as one total overall value on the user interface.</p> <p>7) Vendor demonstrated this test in a compliant manner with the specified requirement.</p> <p>8) Vendor demonstrated this test in a compliant manner with the specified requirement.</p>

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<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	

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<b>Evaluator Observations</b>
<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> <p>Additional feedback pertaining to the tax liability that the taxpayer is to pay to avoid being assessed any delinquent penalties: During the follow-up day of testing, the software vendor demonstrated that the AV amount to use for determining the tax liability for annually assessed mobile homes is based on the most recent prior year's AV - just like the same standard used for the appeals calculation for real property.</p>				

<b>Results</b>
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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		
b. LAND		x		
c. IMPROVE		x		
d. DWELLING		x		
e. BUILDING		x		
f. BLDDCTL		x		
g. APPEAL		x		
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	
s. ADJMETS	x	x	x	
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.

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