

# STATE OF INDIANA

DEPARTMENT OF LOCAL GOVERNMENT FINANCE



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**TO:** Software Vendors

**CC:** County Assessors and County Auditors

**FROM:** Eric Bussis, Director of Data Analysis *EB*

**RE:** 50 IAC 26 Phase I Testing Logistics and Phase II Scenarios

**DATE:** March 5, 2013

The purpose of this memorandum is to provide guidance to software vendors on scheduling Phase I vendor certification testing, documentation required for Phase I testing, a change in Phase I documents, and revisions to the Phase II testing scenarios.

## Phase I Testing Logistics

The Phase I vendor certification process will individually test the following systems of the overall property tax management system: computer aided mass appraisal (CAMA), personal property assessment, oil and gas assessment, sales disclosure, and tax and billing. Even if a vendor may offer an integrated product that comprises more than one of these systems, the Department of Local Government Finance ("Department") requests that each system's functionality be demonstrated separately per the requirements of 50 IAC 26.

Phase I vendor certification testing is scheduled to begin in July 2013 and should be completed by no later than June 2014. All Phase I testing will take place in the Department's conference room, located in room 1058 of the Indiana Government Center North. The conference room is wired for internet connectivity, and the Department will provide both a screen and a projector for vendors to use while performing the various tests. During the testing session, the Department evaluators will ask vendors to provide screen shots and reports of the various functions being performed. To that end, the Department recommends vendors provide a printer with paper that may be used for print-outs of screen shots and reports. Alternatively, vendors may save the screen shots and email the file to the Department evaluators at the conclusion of testing.

The Department is planning to allocate three consecutive business days for testing each system. Vendors should note that the full three days of testing may not be necessary, but is intended to provide some flexibility to vendors in the event that minor adjustments to the systems are required to demonstrate the testing scenarios. For any system deemed non-compliant, vendors may make the required correction(s) and resubmit their system for certification. The Department will issue the testing results within thirty days from the first day of a system's testing. All

sessions will start at 9:00 AM EST and will conclude by 4:30 PM EST with an hour planned for lunch each day. On March 11, 2013, the Department will start accepting requests via email for scheduling testing sessions of Phase I vendor certification and will schedule vendors on a first come, first serve basis. Please direct all requests for scheduling testing sessions to James Johnson at [jjohnson@dlgf.in.gov](mailto:jjohnson@dlgf.in.gov).

### **Phase I Testing Documentation**

In advance of Phase I testing, vendors are required to submit a series of technical and financial documents to the Department. Attached to this memo is the list of required documentation that vendors will need to submit. All required documentation must be received at least 45 calendar days in advance of the start date for the original round of testing. Vendors must email all required documentation to the email address provided below. Vendors must denote proprietary and confidential information on each page that is confidential in a header, footer or watermark.

To promote transparency with the vendor certification process, the testing reports and results will be posted on the Department's Phase I Vendor Certification webpage. Additionally, the Department will post certification letters for each system. Finally, the Department reserves the right to record the testing sessions.

### **Phase I Scenarios**

The Department has received additional follow-up questions from vendors regarding the Phase I testing scenarios since posting the Phase I Q & A document. The Department has updated the Phase I Q & A document to include these questions and also made a change to one scenario. The updated scenario involves the disabled deduction test for the tax and billing systems. The updated documents have been reposted and can be found on the Phase I Vendor Certification webpage under the "50 IAC 26" section at <http://www.in.gov/dlgf/7697.htm>.

### **Phase II Scenarios**

In a memo issued on January 31, 2013, the Department released the initial draft of the Phase II testing scenarios. As referenced in that memo, the Department encouraged vendors and county officials to review the testing scenarios and provide their feedback. Based on the feedback received from the vendors and county officials, the Department has reviewed the Phase II testing scenarios and has made the following changes:

- In the initial Integration area (Section B), the two tests asking vendors to enter records in a sales disclosure system have been deleted; as has the last sentence in the last test referencing the integration of split and transfer data from the sales disclosure system to the tax and billing system.
- In the initial Integration area (Section B), for the test requesting a change to a property address, the wording has been revised to request for a change to a mailing address.
- The Sales Disclosure Data Integration to Tax and Billing Software test area has been deleted.

- In the Tax and Bill to CAMA Integration Test Area, for Test No. 1, the wording has been revised to request for a change to a mailing address.
- In the Reporting Capabilities in the Property Tax Management System Test Area, for Test No. 1 and Test No. 4, the wording has been revised to ask that the tax and billing system generate the reports.

In addition to the updates made to the Phase II testing scenarios, the Department has compiled the questions and comments received from vendors. The Department created a document that addresses the vendors' questions and comments. This document and the revised Phase II testing scenarios can be found on the Phase II Vendor Certification webpage under the "50 IAC 26" section at <http://www.in.gov/dlgf/7698.htm>.

If you have any questions regarding this information, please contact Eric Bussis at [erbussis@dlgf.in.gov](mailto:erbussis@dlgf.in.gov) or James Johnson at [jjohnson@dlgf.in.gov](mailto:jjohnson@dlgf.in.gov).