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| Test | Oil/Gas | CAMA | Pers Prop | Sales Disclosure |
|---|---------|------|-----------|------------------|
| Test Area 1: Import and Back-up of Files | | | | |
| Purpose: Ensure that the assessment system imports and correctly backs up appropriate files. <50 IAC 26-3-5, 50 IAC 26-3-7, 50 IAC 26-12-3, 50 IAC 26-20, 50 IAC 26-21> | | | | |
| Tests: | | | | |
| 1. Starting with a database that contains no records from the applicable county's dataset, demonstrate that the assessment system can correctly import the appropriate data files to create a multi-year database (e.g., a database that contains at least two years - from the current assessment year - of prior history plus the current assessment year) | x | x | x | x |
| 2. Perform an ad hoc back-up of the files listed above in #1 and verify that the assessment system can run the back-up successfully (i.e., without encountering errors on an error report) and on an as needed basis. Toward the end of the testing session, the evaluator will ask the vendor to verify that the system can do a restore of the files that were backed up. | x | x | x | x |
| 3. Verify that the system can automatically perform a back-up of the files listed above in #1 on a daily (or other time frequency) basis. Toward the end of the testing session, the evaluator will ask the vendor to verify that the system can do a restore of the files that were backed up. | x | x | x | x |
| Test Area 2: Assessment System Screens | | | | |
| Purpose: Ensure that the assessment system includes basic features for assessment system screens. <50 IAC 26-3-13> | | | | |
| Tests: | | | | |
| 1. Verify that the system functionality includes: (a) a menu-based means of screen navigation and selection (b) the ability to navigate and select screens by use of a pointing device and (c) the ability to "window" and "scroll" screens. | x | x | x | x |
| 2. Ensure users can travel from screen to screen without re-keying: (a) the parcel number; or (b) the tax identification number. | x | x | x | x |
| Test Area 3: Assessment System Help Functionality | | | | |
| Purpose: Verify that the assessment system includes a context-sensitive tutorial suitable for use by new operators. <50 IAC 26-3-14> | | | | |
| Tests: | | | | |
| Search the tutorial and ensure that it provides the following: | | | | |

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| 1. For user driven fields, the help functionality must include (a) a list of valid codes and a description of their meanings and (b) a well-defined/comprehensive description of constraints on data entry that elaborate further beyond the file formats in 50 IAC 26. Operators must be able to obtain help without being directed away from the assessment system. | (b only) | x | x | x |
| 2. For menus, the help functionality must include a description of the available actions for each menu choice. | x | x | x | x |
| 3. For error messages, the help functionality must include an explanation of all error conditions encountered by the user and advice on corrective action. | x | x | x | x |
| Test Area 4: System and Data Security - Read Only | | | | |
| Purpose: Ensure that the assessment system includes a security system to ensure computer system and data security, including access controls to the system as a whole and appropriate levels of control based on required access to database functions. The local computer system administrator should be able to define users and assign them rights to the system. <50 IAC 26-13-4> | | | | |
| Tests: | | | | |
| 1. Create a read only (search and view) profile as the system administrator. Verify that a user is not allowed to edit or update data in a data field. | x | x | x | x |
| Test Area 5: Record Retrieval by Characteristic, Land Valuation Database, Sketch and Photograph Maintenance, and Printing Photographic Images | | | | |
| Purpose: Verify that assessment system operators can retrieve all data on a parcel by entering certain characteristics. Verify that assessment system operators can perform partial searches and wildcard searches and filter results based on active and/or inactive status. Ensure that land valuation database contains basic data fields. Ensure the assessment system permits the maintenance of sketches of improvements, and allows each sketch to be linked to the related parcel(s). Demonstrate that users have the ability to print photographic images associated with the current record. <50 IAC 26-4-1, 50 IAC 26-4-2, 50 IAC 26-6-1, 50 IAC 26-10-3, IC 6-1.1-4-13.6> | | | | |
| Tests: | | | | |
| 1. Enter a parcel number or property record number and verify that - based only on this characteristic - the system can access the corresponding parcel record. Verify that the operator can access prior and following records from any of the results generated. <i>For CAMA systems, the parcel number should be for a platted lot record.</i> | x | x | x | x |

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| 2. For CAMA systems and oil/gas assessment systems (r. only), from the record accessed in Test No. 1 immediately above verify that the record includes data fields for the following characteristics: | | | | |
| a. Land type and property class. | | x | | |
| b. Actual frontage. | | x | | |
| c. Effective frontage. | | x | | |
| d. Effective depth. | | x | | |
| e. Depth factor. | | x | | |
| f. Land area. | | x | | |
| g. Base rate. | | x | | |
| h. Adjusted rate. | | x | | |
| i. Extended value. | | x | | |
| j. Influence factor type, direction, and percentage. | | x | | |
| k. Township. | | x | | |
| l. Taxing district code. | | x | | |
| m. Addition of subdivision identifier. | | x | | |
| n. Lot number. | | x | | |
| o. Site value. | | x | | |
| 3. Enter a parcel or property record address and verify that - based only on this characteristic - the system can access the corresponding record. For CAMA systems, the parcel address entered should be for a property record that includes an unplatted lot. | x | x | x | x |
| 4. For CAMA systems and oil/gas assessment systems (r. only), verify that the record from Test No. 3 immediately above includes data fields for the following characteristics: | | | | |
| a. Land type and property class. | | x | | |
| b. Soil identification. | | x | | |
| c. Measured acreage. | | x | | |
| d. Productivity factor. | | x | | |
| e. Base rate. | | x | | |
| f. Adjusted rate. | | x | | |
| g. Extended value. | | x | | |
| h. Influence factor type, direction, and percentage. | | x | | |

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|---|---------|------|-----------|------------------|
| i. Township. | | x | | |
| j. Range. | | x | | |
| k. Section. | | x | | |
| l. Taxing district code. | | x | | |
| n. Home site size. | | x | | |
| o. Legal drain size. | | x | | |
| p. Roadway size. | | x | | |
| q. Classification land size by classification type. | | x | | |
| r. Site value. | | x | | |
| 5. Enter the first few letters of an owner's name and verify that the assessment system can find those records corresponding to the entered pattern. Verify that the operator can access prior and following records from any of the results generated. | x | x | x | x |
| 6. From the list generated in Test No. 5 immediately above, access a real property parcel, then, from that record access the corresponding sketch of improvements. | | x | | |
| 7. From the same record that was accessed in Test No. 5 immediately above, access the GIS data linked to that parcel | | x | | |
| 8. Enter the first few letters of a street name and verify that the assessment system can find those records corresponding to the entered pattern. Verify that the operator can access prior and following records from any of the results generated. | x | x | x | x |
| 9. From the list generated in Test No. 8 immediately above, access a real property parcel, then, from that record access the corresponding photographs (multiple). | | x | | |
| 10. From the same record that was accessed in Test No. 9 immediately above, select an image, then, verify that the image can be printed on the property record card or as a larger, standalone document. | | x | | |
| 11. Enter the unique identifier number for a personal property filer and verify that the assessment system can find those personal property records corresponding to the unique identifier number. | | | x | |

Test Area 6: Maintenance of Historical Assessment System Data

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| Test | Oil/Gas | CAMA | Pers Prop | Sales Disclosure |
|---|---------|------|-----------|------------------|
| <p>Purpose: Demonstrate that the assessment system can maintain and make available for electronic retrieval historical year assessment data, personal property data, annually assessed mobile home data, oil and gas assessment data, and data from sales disclosure forms. <50 IAC 26-6-5, 50 IAC 26-6-6, 50 IAC 26-6-7, 50 IAC 26-6-8, 50 IAC 26-6-9, 50 IAC 26-6-10></p> | | | | |
| <p>Tests:</p> | | | | |
| <p>1. Access a record from two years before the current assessment year to verify that the assessment system stores this data within the database and has not been purged. Demonstrate that the assessment system has the ability to store any historical data that has been purged from the database off-line in ASCII format, which can then be accessed by and viewed in the assessment system.</p> | x | x | x | x |
| <p>Test Area 7: System and Data Security - Record Creation and Updating</p> | | | | |
| <p>Purpose: Ensure that the assessment system includes a security system to ensure computer system and data security, including access controls to the system as a whole and appropriate levels of control based on required access to database functions. The local computer system administrator should be able to define users and assign them rights to the system. <50 IAC 26-13-4></p> | | | | |
| <p>Tests:</p> | | | | |
| <p>1. Attempt to add a new record for the current assessment year. Verify that the user does not have the ability to do so. Edit the security profile for the user, as a system administrator might, so that the user has rights to create new records and change parcel/property record characteristics. For CAMA systems only, edit the security profile for the user so that the user can create new records and change parcel characteristics but cannot split parcels. Then, log on as this user, and attempt to split a parcel. Verify that such an operation is not allowed.</p> | X | x | X | X |
| <p>2. For CAMA systems only, after demonstrating Test No. 1 immediately above, edit the security profile for the user, as a system administrator might, so that the user has rights to create new records and change parcel/property record characteristics and perform splits and combinations.</p> | | x | | |
| <p>Test Area 8: Record Maintenance (for non-CAMA assessment systems)</p> | | | | |

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| Test | Oil/Gas | CAMA | Pers Prop | Sales Disclosure |
|--|---------|------|-----------|------------------|
| <p>Purpose: Verify that an operator with the appropriate security level can perform basic modifications to a record and that the assessment system can capture and properly maintain basic user data after the addition, update, or inactivation of a record. Verify that the assessment system prevents erroneous data entry and provides readily noticeable indicators of data entry incompatible with 50 IAC 26. Demonstrate that the assessment system permits a county to maintain, enter, update, and retrieve real and personal property assessment records and sales disclosure records and annually assessed mobile home records for two (2) assessment years subsequent to the current assessment year <50 IAC 26-3-12, 50 IAC 26-6-10, 50 IAC 26-12-1, 50 IAC 26-13-1></p> | | | | |
| <p>Tests:</p> | | | | |
| <p>1. Add a new record for the current assessment year.</p> | x | | x | x |
| <p>a. Verify that the record contains a date and time stamp showing the date and time the record was created.</p> | x | | x | x |
| <p>b. Verify that the record contains a username or user identification stamp showing the operator who created the record.</p> | x | | x | x |
| <p>c. Verify that the assessment system prevents erroneous data entry and provides readily noticeable indicators of data entry incompatible with 50 IAC 26.</p> | x | | x | x |
| <p>d. Verify that the record contains a unique identifier that pertains to a specific personal property filer (separate from the Federal Identification Number). Verify that this identifier can be carried forward into the following years if a return is subsequently filed by the filer. Verify that the assessment system allows for the application of any pertinent fees and penalties to the filer's records based on this unique identifier.</p> <p>e. Mark the record as the individual associated with the property is requesting anonymity from public records request pursuant to IC 36-1-8.5</p> | | | x | |
| <p>2. Inactivate a current record for the current assessment year, and then, close the record. Next, access the inactivated record.</p> | X | | x | |
| <p>a. Verify that the record contains a date and time stamp showing the date and time the record was inactivated.</p> | X | | x | |
| <p>b. Verify that the record contains a username or user identification stamp showing the operator who inactivated the record.</p> | X | | x | |
| <p>3. Access an existing inactive record and restore the record to active status.</p> | X | | x | |

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|--|---------|------|-----------|------------------|
| 4. Add a new record for two (2) assessment years subsequent to the current assessment year. | x | | x | X |
| a. Verify that the record contains a date and time stamp showing the date and time the record was created. | x | | x | X |
| b. Verify that the record contains a username or user identification stamp showing the operator who created the record. | x | | x | X |
| c. Verify that the assessment system prevents erroneous data entry and provides readily noticeable indicators of data entry incompatible with 50 IAC 26. | x | | x | X |
| <i>If annually assessed mobile home records are housed in the vendor's CAMA system, this test will be demonstrated during CAMA testing. If annually assessed mobile home records are housed in the personal property assessment system, this test will be performed during personal property assessment system testing.</i> | | | | |
| Test Area 9: Record Maintenance (CAMA Only) | | | | |
| Purpose: Verify that an operator with the appropriate security level can perform basic modifications to a record and that the assessment system can capture and properly maintain basic user data after the addition, update, or inactivation of a record. Verify that the assessment system prevents erroneous data entry and provides readily noticeable indicators of data entry incompatible with 50 IAC 26. <50 IAC 26-3-12, 50 IAC 26-12-1, 50 IAC 26-13-1> | | | | |
| Tests: | | | | |
| 1. Perform a split on an active real property record where a new parcel is created and the original parcel is maintained and is still active. | | x | | |
| a. Verify that the record contains a date and time stamp showing the date and time the record was created. | | x | | |
| b. Verify that the record contains a username or user identification stamp showing the operator who created the record. | | x | | |
| c. Verify that the record contains an appropriate reason code from Code List 5 - Reason for Change Codes of the property tax file format requirements found in Property Tax Management System Code List Manual corresponding to the split. | | x | | |
| d. Verify that the original record (i.e., the parent parcel) is retained as part of the parcel history. | | x | | |
| e. Mark both records as the individual associated with the property is requesting anonymity from public records request pursuant to IC 36-1-8.5 | | x | | |
| 2. Perform a split on an active real property record, creating two new parcels. | | x | | |

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| Step 1: Create two new parcels (Vendors: please note that this test may be performed in several different iterations with different characteristics as requested by the evaluator) | | x | | |
| a. Verify that the new records contain a date and time stamp showing the date and time the records were created. | | x | | |
| b. Verify that the new records contain a username or user identification stamp showing the operator who created the records. | | x | | |
| c. Verify that the new records contain an appropriate reason code from Code List 5 - Reason for Change Codes of the property tax file format requirements found in Property Tax Management System Code List Manual corresponding to the split. | | x | | |
| d. Generate a correct property class code for both of the two new parcels created. | | x | | |
| Step 2: Inactivate the original parent parcel | | | | |
| a. Next, access the inactivated record. Verify that the record contains a date and time stamp showing the date and time the record was inactivated. | | x | | |
| b. Verify that the record contains a username or user identification stamp showing the operator who inactivated the record. Then, close the record. | | x | | |
| 3. Perform a combination on two contiguous active real property records. The assessment system must ensure that only eligible parcels can be combined. Access two parcels that are contiguous with each other. Verify that the attributes have been generated and that the new parcel contains a date and time stamp, a username or user identification stamp, and an appropriate Reason for Change code corresponding to the combination. | | x | | |
| 4. Access an existing active record. Inactivate the record. Then, restore the record to active status. | | x | | |
| 5. Add a new record for two (2) assessment years subsequent to the current assessment year. | | x | | |
| a. Verify that the record contains a date and time stamp showing the date and time the record was created. | | x | | |
| b. Verify that the record contains a username or user identification stamp showing the operator who created the record. | | x | | |
| <i>If annually assessed mobile home records are housed in the vendor's CAMA system, this test will be demonstrated during CAMA testing. If annually assessed mobile home records are housed in the personal property assessment system, this test will be performed during personal property assessment system testing.</i> | | | | |

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| 6. Enter the first few digits of a parcel number to access a record in which a split has been performed. Then, see that all parcels from the split appear. | | x | | |
| Test Area 10: Changes to Parcel Numbers | | | | |
| Purpose: Ensure that, where parcel numbers have changed, all parcel records include the old parcel number and the new parcel number. <50 IAC 26-13-3> | | | | |
| Tests: | | | | |
| 1. Test a scenario in which the county was to renumber a selection of its parcels. Demonstrate that a new parcel number contains a reference back to the originating parcel number. | | x | x | |
| Test Area 11: Property Tax Cap Allocations | | | | |
| Purpose: Demonstrate ability of assessment system to separate gross assessed value of land and improvements into the one percent (1%) homestead-eligible, two percent (2%), and three percent (3%) tax cap allocations. <50 IAC 26-6-3, IC 6-1.1-12-37, IC 6-1.1-20.6-0.5, IC 6-1.1-20.6-2.3, IC 6-1.1-20.6-4, IC 6-1.1-20.6-2.5> | | | | |
| Tests: | | | | |
| 1. Access a property record that contains land and create at least three (3) structures that can be correctly classified under the allocations shown immediately below. Ensure that the property class code on the parcel is consistent with the AV allocation. Ensure that the assessed value breakdown gets carried to the valuation record. | | x | | |
| a. Land eligible for the one percent (1%) tax cap | | x | | |
| b. Improvements eligible for the one percent (1%) tax cap | | x | | |
| c. Land eligible for the two percent (2%) tax cap: | | x | | |
| Non-Homestead Residential Land | | x | | |
| Commercial Apartment Land | | x | | |
| Long Term Care Facility Land | | x | | |
| Farmland | | x | | |
| Mobile Home Land | | x | | |
| d. Improvements eligible for the two percent (2%) tax cap: | | x | | |
| Non-Homestead Residential Improvements | | x | | |
| Commercial Apartment Improvements | | x | | |
| Long Term Care Facility Improvements | | x | | |

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| e. Land eligible for the three percent (3%) tax cap | | x | | |
| f. Improvements and personal property eligible for the three percent (3%) tax cap | | x | | |
| 2. Perform an adjustment to an AV bucket allocation on an existing property record. Ensure that the property class code on the parcel is consistent with the AV allocation. If a discrepancy should exist, the system must provide an indicator of the potential error. | | x | | |
| 3. Perform an adjustment to the property class code on an existing property record. Ensure that the property class code on the parcel is consistent with the AV allocation. If a discrepancy should exist, the system must provide an indicator of the potential error. | | x | | |
| 4. Access a record which contains a parcel for which a standard deduction for homestead could be claimed (pursuant to IC 6-1.1-12). Verify that the record contains an indicator that informs users that the parcel is eligible for a homestead deduction. Ensure that the property is classified under the 1% homestead AV allocation bucket. | | x | | |
| Test Area 12: Ability to Update Data Fields | | | | |
| Purpose: Verify that user-supplied data elements can be updated by user or administrator. <50 IAC 26-6-1> | | | | |
| Tests: | | | | |
| 1. Access a real property record consisting of only vacant land and compute the true tax value of the property record. | | x | | |
| 2. Access a land valuation table. Verify that the base values in that table can be changed. Change the soil factor used in land valuation to another soil factor. | | x | | |
| 3. After performing Test No. 2 immediately above, access the real property record from Test No. 1 in this test area and compute the true tax value of the property record. | | x | | |
| Test Area 13: Sketch Entry and Improvements Valuation | | | | |
| Purpose: Ensure the assessment system permits the entry of a sketch of improvements. Verify that Department-supplied cost schedules can be imported into the system and can be accessed by user or administrator for calculation of improvement valuations. Verify that the assessment system can compute the true tax value for individual improvements and in the aggregate by the total of all improvements for a parcel. <50 IAC 26-4-1, 50 IAC 26-6-2> | | | | |
| Tests: | | | | |

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| 1. Access a real property record consisting of only vacant land. Add and perform a sketch of multiple improvements, to include linear features, on a single parcel that includes the following features: | | | | |
| a. Dimensions | | x | | |
| b. Labels | | x | | |
| c. Annotation | | x | | |
| d. Computation of floor areas | | x | | |
| e. Computation of perimeters (C and I only) | | x | | |
| f. Computation of perimeter area ratios (C and I only) | | x | | |
| 2. Access a real property record consisting of only vacant land. Add and perform a sketch of an improvement that includes the following: | | | | |
| a. Multiple wall heights | | x | | |
| b. Year constructed | | x | | |
| c. Uses within the building | | x | | |
| 3. Access a real property record consisting of only vacant land. Add and perform a sketch of an improvement that includes an open area within an enclosed improvement (e.g., courtyard). | | x | | |
| 4. For Test No. 1 - Test No. 3 immediately above, compute the true tax value for the improvements that have been made on the property, with each improvement displayed individually. Additionally, verify that the aforementioned improvements can be displayed in the aggregate. | | x | | |
| 5. Demonstrate that the assessment system can import updated residential, agricultural, commercial, and industrial cost schedules as referenced in the Department's Real Property Assessment Guidelines manual. | | x | | |
| 6. Access the same real property records that were used in Test No. 4 above. Compute the true tax value for the improvements that have been made on the property, with each improvement displayed individually. Verify that the system has correctly calculated the true tax value using the cost schedules imported in No. 5 above. Verify that the aforementioned improvements can be displayed in the aggregate. | | x | | |

Test Area 14: Entry of Sound Value of a True Tax Value

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| Purpose: Validate that the assessment system permits the “sound value” entry of a tax value in practical fashion under reasonable circumstances, and that the system indicates on a record when the sound value is entered. <50 IAC 26-6-4> | | | | |
| Tests: 1. Demonstrate that the assessment system can accept entry of a sound value entry of a true tax value. Show the evaluator how the assessment system places an indicator on those records containing a sound value entry. Also, verify that the assessment system displays a reason code corresponding to entry of the sound value. | | x | | |
| Test Area 15: Calculation of Assessment Ratios and Data for Transmission to the Department | | | | |
| Purpose: Ensure that the assessment system can produce, in the appropriate format, basic data elements used to calculate the coefficient of dispersion and median assessment ratio for transmission to the department. Demonstrate that the assessment system can accurately calculate an assessment ratio and related calculations. <50 IAC 26-6-11, 50 IAC 26-6-12, and 50 IAC 26-8-3> | | | | |
| Tests: 1. Select a group of at least thirty (30) parcels at the evaluator's discretion. Then, calculate the assessment ratio, the coefficient of dispersion, and the price related differential for the parcels selected. | | x | | |
| 2. Verify that the assessment system can calculate an assessment ratio according to the Real Property Assessment Manual requirements. | | x | | |
| 3. Verify that the assessment system can calculate assessment ratios to the .95 confidence level. | | x | | |
| 4. Verify that the assessment system can calculate an assessment ratio for the following classes of property: | | | | |
| a. Improved Residential | | x | | |
| b. Unimproved Residential | | x | | |
| c. Improved Commercial | | x | | |
| d. Unimproved Commercial | | x | | |
| e. Improved Industrial | | x | | |
| f. Unimproved Industrial | | x | | |

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| 5. Verify that the assessment system has the functionality to provide an indicator if the minimum number of verified sales is less than five sales. | | x | | |
| 6. Verify that the assessment system can produce and export in an electronic spreadsheet format the following data elements: | | | | |
| a. Parcel number. | | x | | |
| b. Assessed value of land. | | x | | |
| c. Assessed value of improvement. | | x | | |
| d. Date of sale. | | x | | |
| e. Sale price. | | x | | |
| f. Township. | | x | | |
| g. School corporation | | X | | |
| h. County taxing district number | | X | | |
| i. State assigned taxing district number. | | x | | |
| j. Condition rating | | X | | |
| k. Grade | | X | | |
| l. Neighborhood-code. | | x | | |
| m. Property class code. | | x | | |
| 7. Verify that the assessment system has the functionality to produce the documents containing the parameters specified in the most current Ratio Study Guidance memo distributed by the Department's Assessment Division. These documents include the "Workbook" and the Ratio Study. | | x | | |
| Test Area 16: Equalization Factor | | | | |
| Purpose: Demonstrate that assessment software provides a data field in which an equalization factor can be entered once and applied to parcels within any class of property in township. <50 IAC 26-6-12> | | | | |
| Tests: | | | | |
| 1. Access an equalization table. Then, enter an equalization factor into a record's appropriate data field. Next, access a parcel and review that the factor was applied to this parcel. | | x | | |
| Test Area 17: Annual Adjustment Calculation and Entry to Individual Records and Groups of Properties and Notice of Valuation | | | | |

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| Test | Oil/Gas | CAMA | Pers Prop | Sales Disclosure |
|--|---------|------|-----------|------------------|
| <p>Purpose: Demonstrate that the assessment system permits calculation and entry of annual adjustment of real property assessed valuations. Demonstrate that the assessment system meets basic requirements related to the application of adjustments to user specified groups of properties. Ensure that the assessment system notifies users that a parcel requires a notice of valuation (Form 11) once the property value has been modified. <50 IAC 26-6-13></p> | | | | |
| <p>Tests:</p> | | | | |
| <p>1. Access an annual adjustment table. Then enter an annual adjustment factor into a record's appropriate data field. Next, access a parcel and review that the factor was applied to this parcel. Verify that:</p> | | | | |
| <p>a. The factor calculates the correct value.</p> | | x | | |
| <p>b. The assessment system calculates time adjusted sale prices in accordance with procedures outlined in the IAAO standard and 50 IAC 21-3-3.</p> | | x | | |
| <p>c. The assessment system allows users to manually enter time adjusted sale prices on each parcel when an alternative method of calculation is utilized by a local assessing official.</p> | | x | | |
| <p>d. The assessment system notifies users that a notice of valuation (Form 11) must be sent to the taxpayer corresponding to the modified parcel.</p> | | x | | |
| <p>2. Select a neighborhood grouping of approximately thirty (30) properties. Then, perform the following:</p> | | | | |
| <p>a. Verify that an annual adjustment factor(s) can be applied to these properties.</p> | | x | | |
| <p>b. Verify that users can apply the factor(s) resulting from revised ratio studies to these properties.</p> | | x | | |
| <p>c. Verify that the assessment system marks each of the parcels as requiring a notice of valuation (Form 11).</p> | | x | | |
| <p>Test Area 18: Data Integrity</p> | | | | |
| <p>Purpose: Ensure that the assessment system includes basic features to ensure data integrity. <50 IAC 26-13-2></p> | | | | |
| <p>Tests:</p> | | | | |
| <p>1. After rolling data to the tax and billing system, verify that the assessment system prevents addition, modification, or removal of certified assessment data in the current tax year.</p> | x | x | x | |

The "x" shown in the Oil/Gas, CAMA, Pers Prop, and Sale Disclosure columns means that a particular test and/or file pertain to that particular assessment system

| Test | Oil/Gas | CAMA | Pers Prop | Sales Disclosure |
|--|---------|------|-----------|------------------|
| 2. Access a record of certified assessment data from the year immediately prior to the current assessment year. Attempt to change the date and time stamp to another date and time, and to change the username or user identification stamp to another user. Verify that neither change is allowed. | x | x | x | |
| 3. Access a record from the current tax year (prior assessment year) that requires a correction of error. Verify that the system creates a separate posting with the corrected assessment data and does not overwrite the certified assessment data for the given parcel in the original record. | x | x | x | |
| 4. Access a record from a year prior to the prior assessment year and current tax year. Attempt to edit the record and verify that the assessment system prevents users from making such edits. | x | x | x | |
| Test Area 19: System and Data Security - Adding Appeals Data | | | | |
| Purpose: Ensure that the assessment system includes a security system to ensure computer system and data security, including access controls to the system as a whole and appropriate levels of control based on required access to database functions. The local computer system administrator should be able to define users and assign them rights to the system. <50 IAC 26-13-4> | | | | |
| Tests: | | | | |
| 1. Edit the security profile for the user, as a system administrator might, so that the user does not have rights to add appeals data to a property record. Then, log on as this user (or otherwise refresh the user interface), and attempt to add an appeal to a property record. Verify that such an operation is not allowed. | x | x | x | |
| 2. After demonstrating Test No. 1 immediately above, edit the security profile for the user, as a system administrator might, so that the user has rights to add appeals data to a property record. | x | x | x | |
| Test Area 20: Record of Adjustments and Appeals | | | | |
| Purpose: Validate that the assessment system maintains a full record of adjustments that affect assessed value resulting from error correction, appeals granted at the county level, and appeals granted by the Indiana Board of Tax Review or any other valid reassessment. <50 IAC 26-6-4> | | | | |
| Tests: | | | | |

The "x" shown in the Oil/Gas, CAMA, Pers Prop, and Sale Disclosure columns means that a particular test and/or file pertain to that particular assessment system

| Test | Oil/Gas | CAMA | Pers Prop | Sales Disclosure |
|--|---------|------|-----------|------------------|
| 1. Access a property record. Adjust the assessed value of that record through a correction of error, then make a further adjustment based on an appeal granted at the county level. Review the resulting record of adjustments for the given property record, ensuring that it includes the following for both of the foregoing changes: | | | | |
| a. The record that was changed. | x | x | x | |
| b. The prior value. | x | x | x | |
| c. The new value. | x | x | x | |
| d. The date of the adjustment. | x | x | x | |
| e. The reason for the adjustment (i.e., Form 130 or Form 133). | x | x | x | |
| f. A short description of the change. | x | x | x | |
| <i>If annually assessed mobile home records are housed in the vendor's CAMA system, this test will be demonstrated during CAMA testing. If annually assessed mobile home records are housed in the personal property assessment system, this test will be performed during personal property assessment system testing.</i> | | | | |
| Test Area 21: Assessment Forms and Reports | | | | |
| Purpose: Ensure that the assessment system maintains data necessary to generate State-mandated reports. <50 IAC 26-10-3> | | | | |
| Tests: | | | | |
| 1. Access a real property, personal property, oil/gas, and mobile home record. Then, generate each of the following reports from one of these three records, as applicable: | | | | |
| a. A notice of assessment required by IC 6-1.1-4-22. | | x | | |
| b. A notice of assessment required by IC 6-1.1-3-15 or IC 6-1.1-9-1. | | x | x | |
| c. A notice of assessment for annually assessed mobile homes as required by 50 IAC 3.2-4-3. | | x | x | |
| d. A notice of final determination of assessment, as required by IC 6-1.1-15-4(f). | | x | x | |
| e. A property record card required by the Real Property Assessment Guidelines for 2002-Version A (incorporated by reference at 50 IAC 2.3-1-2). | | x | | |
| f. Any additional forms or reports required by law that the department decides to add to this test. | x | x | x | x |
| Test Area 22: Assessment Management Reports | | | | |

The "x" shown in the Oil/Gas, CAMA, Pers Prop, and Sale Disclosure columns means that a particular test and/or file pertain to that particular assessment system

| Test | Oil/Gas | CAMA | Pers Prop | Sales Disclosure |
|--|---------|------|-----------|------------------|
| Purpose: Ensure that certain management reports are available on demand in an electronic format (i.e., .xls) to county assessors or designated officials within other county offices. <50 IAC 26-10-2, 50 IAC 26-10-3> | | | | |
| Tests: | | | | |
| 1. For each of the following, display a management report that provides the listed information: | | | | |
| a. Total assessed value under appeal by taxing district, township, and county. | | x | x | |
| b. Total number of changes in assessment processed including resulting change in assessed value by type of change including corrections of error, adjudicated appeals, annual maintenance changes and additional assessment. | | x | x | |
| d. List of user-specified data fields for adjacent parcels owned by the same taxpayer. | | x | | |
| e. List of taxpayers and parcel numbers and email addresses for taxpayers who are requesting to receive their tax statements via electronic mail. | | | | x |
| f. List of personal property taxpayer names based on the unique identifier, the personal property record numbers, and total assessed value amounts associated with each unique identifier. | | | x | |
| Test Area 23: Generation of User-Defined Reports for Assessment | | | | |
| Purpose: Ensure that the assessment system meets minimum requirements for the generation and display of user-defined reports, including making available the following for summary statistics shown below. <50 IAC 26-10-1> | | | | |
| Tests: | | | | |
| 1. Produce a user-defined report using the summary statistics shown immediately below. Verify that: 1) users can select multiple years 2) users can choose the fields from the assessment system data for inclusion in the report and 3) users can sort in any user-specified order (i.e., ascending or descending order). | | | | |
| a. Sum. | x | x | x | x |
| b. Count. | x | x | x | x |
| c. Mean. | x | x | x | x |
| d. Median. | x | x | x | x |
| e. Difference. | x | x | x | x |
| f. Product. | x | x | x | x |
| g. Ratio. | x | x | x | x |

The "x" shown in the Oil/Gas, CAMA, Pers Prop, and Sale Disclosure colums means that a particular test and/or file pertain to that particular assessment system

| Test | Oil/Gas | CAMA | Pers Prop | Sales Disclosure |
|---|---------|------|-----------|------------------|
| h. Standard deviation. | x | x | x | x |
| i. Coefficient of variation. | | x | | |
| j. Coefficient of dispersion. | | x | | |
| k. Price related differential. | | x | | |
| l. Variance. | x | x | x | x |
| m. Percentages. | x | x | x | x |
| n. Linear regression. | | x | | |
| o. Weighted mean. | | x | | |
| p. Scatter plots | | x | | |
| q. Box plot (also commonly referred to as a "box and whiskers") | | x | | |
| Test Area 24: Future Access to a User-defined Report | | | | |
| Purpose: Ensure that the assessment system includes certain features to facilitate continued access to particular user-defined reports. <50 IAC 26-10-1> | | | | |
| Tests: | | | | |
| 1. After generating one of the user-defined reports in Test Area 23 above, save the report in an electronic format (i.e., .xls) and then, close the file. Then, re-open the file to verify that the report can be saved in an electronic format (i.e., .xls). | x | x | x | x |
| 2. After generating one of the user-defined reports in Test Area 23 above, save the layout query(ies) and structure of the report. Then, open the saved file after the underlying data has been updated to verify that the report has been updated. | x | x | x | x |
| Test Area 25: Creation of Files | | | | |
| Purpose: Ensure that the assessment system creates appropriate files. <50 IAC 26-3-5, 50 IAC 26-3-6, 50 IAC 26-3-7, 50 IAC 26-12-1, 50 IAC 26-20, 50 IAC 26-21> | | | | |
| Tests: | | | | |
| 1. Demonstrate that the assessment system can create the following files in the file formats as specified for each file as reflected in 50 IAC 26-20: | | | | |
| a. PARCEL | | x | | |
| b. LAND | | x | | |
| c. IMPROVE | | x | | |
| d. DWELLING | | x | | |
| e. BUILDING | | x | | |

The "x" shown in the Oil/Gas, CAMA, Pers Prop, and Sale Disclosure columns means that a particular test and/or file pertain to that particular assessment system

| Test | Oil/Gas | CAMA | Pers Prop | Sales Disclosure |
|--|---------|------|-----------|------------------|
| 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 | | | |
| 2. For each of the files listed above in #1, demonstrate that the assessment system adheres to the following file parameters: | | | | |
| a. Each file must have a header record and a trailer record in the exact specified format with designated "FILENAME" and the word "TRAILER" in uppercase. | x | x | x | x |
| b. All fields are fixed length. | x | x | x | x |
| c. All alphanumeric fields shall be left justified. | x | x | x | x |
| d. All numeric fields must have leading zeros if field value does not utilize all available spaces. | x | x | x | x |
| e. Assume no decimal precision for all numeric fields without format clarification. | x | x | x | x |
| f. All decimal precision is implied. For example, for format 3.2, send 12345. It will be read as "123.45". | x | x | x | x |
| g. All Yes/No fields must have "Y" or "N". | x | x | x | x |
| h. All date fields must be in mm/dd/yyyy format, and entries must contain a valid date. | x | x | x | x |
| i. All fields that reference a code list should contain a value from the lists provided in the Property Tax Management System Code List Manual. | x | x | x | x |
| j. Place a negative sign "-" at the far left of the field for all negative numbers. | x | x | x | x |
| k. Phone number format required is ####-###-#### ##### (e.g., 317-555-5555 44444). Phone number extensions may be replaced with spaces if no extension exists. | x | x | x | x |

The "x" shown in the Oil/Gas, CAMA, Pers Prop, and Sale Disclosure columns means that a particular test and/or file pertain to that particular assessment system

| Test | Oil/Gas | CAMA | Pers Prop | Sales Disclosure |
|--|---------|------|-----------|------------------|
| l. Postal code format is expected to be xxxxx-xxxx. If no + 4 for the postal code is available, fill with 0000. The space allocated for postal code should accommodate international postal codes. | x | x | x | x |
| m. Federal ID numbers that contain a Social Security Number must suppress/redact the entire number. | | | x | |
| 3. Verify that the assessment system can produce a report (or series of reports) that provides an inventory of records containing data fields, which are null/empty or have invalid values that may result in noncompliance with the property tax file requirements found in 50 IAC 26-20. | x | x | x | x |
| 4. Verify that the assessment system has the capability of generating the files listed above in #1 for a prior assessment year. | x | x | x | x |
| 5. After the assessment system creates the files listed in No. 1, verify that the system can successfully perform a restore of the files that were backed up in Test Area 1 (Import and Back-up of Files) at the beginning of the testing script. | x | x | x | x |
| Test Area 26: Histories and Transaction Logs | | | | |
| Purpose: Ensure the user can generate historical reports and transaction logs from the assessment system database. <50 IAC 26-9-1> | | | | |
| Tests: | | | | |
| 1. Input parameters for user or user identification and starting/ending dates and times, then, generate a transaction log of all of the foregoing activities performed during this certification. The resulting transaction log must contain: | | | | |
| a. Username or user identification. | x | x | x | x |
| b. Date and time. | x | x | x | x |
| c. Terminal identification. | x | x | x | x |
| d. Transaction type. | x | x | x | x |
| e. Totals and summary level information. | x | x | x | x |