STATE OF INDIANA
DEPARTMENT OF LOCAL GOVERNMENT FINANCE

Phase II Certification Testing Summary
Dates of Test: September 19 and October 11, 2019
Date of Report: November 4, 2019

Vendor Pairing Tested Thomson Reuters to Low
Software Pairing Tested ProVal Version 9.1 to WinTax Version 9.17
Certification Test Performed Assessment to Tax and Billing Software

BACKGROUND
The Indiana Department of Local Government Finance ("Department") is responsible for administration and oversight of the property tax system in the State of Indiana. The Department enforces 50 IAC 26: Computer Standards for a Uniform and Common Property Tax Management System. The purpose of 50 IAC 26 is *"to establish standards for computer systems used by Indiana counties for the administration of the property tax assessment, billing and settlement process."*

50 IAC 26-18-3 calls for an integrative certification process known as "Phase II" testing. Property tax management systems subject to certification under 50 IAC 26-18-1 that utilize assessment and tax and billing systems and that have been software certified by the Department during Phase I testing are subject to Phase II testing.

This report is a summary of the Phase II tests administered to Thomson Reuters and Low. Thomson Reuters and Low sought Phase II certification for the integrative functionality from ProVal Version 9.1 (CAMA module) to WinTax Version 9.17 (Tax and Billing module). Testing dates were September 19 and October 11, 2019. Testing was conducted by James Johnson of the Department. Vicki Cole, Joey Samples, and Tom Stoddard represented Thomson Reuters and Mike Lepay and David Riley represented Low ("Applicants"). The Applicants demonstrated all requested Phase II tests in a virtual meeting environment using the WebEx software solution.

TESTING PROCESS
The Phase II testing process is conducted as follows: the individual administering the test reads the test document item and observes the Applicants performing the respective function on the Applicants' systems. If the systems perform the function as defined in the test, the Department evaluator indicates that performance by marking a "C" for compliant. If the systems do not perform the function, the Department evaluator enters an "N" for not compliant. Upon completion of the test procedures, the Department evaluator reviews test notes and submits summary suggestions to the Department's Commissioner and the Chief of Staff/General Counsel for their review. The Department will render Phase II certification if the Applicants are compliant in all categories tested.

TEST SUMMARY
After completion of Phase II testing on October 11 and reviewing the resultant data from these test procedures, the Department evaluator observed that the Applicants successfully demonstrated all required tests. The Department evaluator's observations of the various tests demonstrated by the Applicants during Phase II testing can be found in the Department evaluation workbook, which accompanies this document.

RECOMMENDATION
Based on the review of the testing results, the Department evaluator recommends the tested integrative functionality between Thomson Reuters ProVal Version 9.1 (CAMA module) and Low WinTax Version 9.17 (Tax and Billing module) for Phase II certification.

If you have any questions regarding this Test Summary, please contact James Johnson at (317) 234-8274 or jjohnson@dlgf.in.gov.