

### **Test Area 1: Property Tax Management System Help Functionality**

#### **Tests:**

1. Have the county user demonstrate that they can access the help functionality (e.g., user guide or training manual) of their system.

### **Test Area 2: Capture and Maintenance of Data on Record Addition and Update**

**Perform three tests from the options immediately below. The county user may choose which three tests to demonstrate based on actual information that is pending data entry into the property tax management system:**

1. Enter a sales disclosure record into the sales disclosure system.
2. Enter a personal property filing system into the personal property system.
3. Enter an appeal into the assessment system.
4. Add an improvement to an existing real property record. Along with the detail coding that goes into the various data entry fields for the improvement, make and save a sketch of the improvement to the record.
5. Perform a split on an active real property record.
6. Perform a combination on two active real property records.
7. Perform a transfer of ownership on a real property record.
8. Change the mailing address on a real property record.
9. Change the parcel number on a real property record due to annexation.
10. Enter a correction of error in the tax and billing system.

The testing evaluator may ask the county user to generate and display standard, pre-formatted forms (e.g., a Form 11, a property record card, a TS-1) following the completion of the tests listed above. In addition to demonstrating three of the tests listed above, the county user will be asked to generate from the tax and billing system the lock modification tracking document as prescribed by the Department.

### **Test Area 3: Record Retrieval by Characteristic**

#### **Tests:**

1. Have the county user enter a parcel number and access the corresponding property record for a commercial or industrial real property record.
2. Have the county user enter a property address and access the corresponding property record for an annually assessed mobile home.
3. For personal property records, have the county user enter the first few letters of an owner's name and generate the list of resulting records.
4. Have the county user enter the first few letters of a street name and generate the corresponding list of resulting records. From the list of result records, have the county user access a real property record with homestead AV. Then, either from the same list of results or from another list generated in a similar manner, have the county user access a non-homestead residential real property record.

The testing evaluator will ask to see the AV allocations screen for the records generated from these tests.

### **Test Area 4: Maintenance of Data from Prior Years**

#### **Tests:**

1. Have the county user access one real property record, one annually assessed mobile home record, and one personal property record from the 2012 Pay 2013 cycle.