

ISLAND COUNTY ASSESSOR & TREASURER



REQUEST FOR PROPOSAL

for a

COMPREHENSIVE, END-TO-END, INTEGRATED ASSESSMENT ADMINISTRATION, CAMA & TAXATION SYSTEM

May 9, 2009

TABLE OF CONTENTS

I.	<u>GENERAL INFORMATION</u>	- 1 -
A.	OBJECTIVE.....	- 1 -
B.	INTRODUCTION	- 1 -
C.	CURRENT TECHNOLOGY INFRASTRUCTURE.....	- 3 -
II.	<u>GENERAL REQUIREMENTS</u>	- 5 -
A.	MODERN TECHNOLOGY.....	- 5 -
B.	COMPLIANCE.....	- 5 -
C.	PROVEN AND PROGRESSIVE.....	- 5 -
D.	INTEGRATION	- 5 -
E.	INNOVATIVE.....	- 5 -
F.	MAINTENANCE	- 5 -
III.	<u>PROPOSAL EVALUATION PROCEDURE</u>	- 7 -
A.	VENDOR INFORMATION	- 7 -
B.	VENDOR BUSINESS PHILOSOPHY	- 7 -
C.	VENDOR BACKGROUND AND QUALIFICATIONS	- 7 -
D.	MANUFACTURER AFFILIATION	- 8 -
E.	REFERENCE LIST	- 8 -
F.	REGISTRATION OF VENDOR	- 8 -
G.	SUBMISSION OF PROPOSALS	- 8 -
H.	MULTIPLE PROPOSALS	- 8 -
I.	AUTHORIZATION TO BID.....	- 8 -
J.	SUBMISSION OF VENDOR CONTRACTS.....	- 8 -
K.	VENDOR INQUIRIES	- 9 -
L.	PROPOSAL COST ERRORS	- 9 -
M.	PRODUCT INFORMATION.....	- 9 -
N.	BENCHMARK CRITERIA	- 9 -
O.	INSTALLATION, INTEGRATION AND TESTING	- 9 -
P.	PROPOSAL EVALUATION	- 9 -
Q.	REJECTION OF PROPOSALS.....	- 9 -
R.	LEGAL AND CONTRACTUAL ISSUES	- 10 -
	<i>1. Terms of Payment</i>	- 10 -
	<i>2. Delivery</i>	- 10 -
	<i>3. Acceptance</i>	- 10 -
	<i>4. Assignment, Use and Resale</i>	- 10 -
	<i>5. Termination</i>	- 10 -
	<i>6. Execution Authority and Legal Assistance</i>	- 10 -
	<i>7. Product Warranty</i>	- 10 -
IV.	<u>PROPOSAL REQUIREMENTS</u>	- 11 -
A.	HARDWARE FOR THE ASSESSOR’S OFFICE.....	- 11 -
B.	SOFTWARE.....	- 11 -
C.	TRAINING	- 11 -
D.	INSTALLATION AND CONVERSION	- 11 -
E.	SOFTWARE/HARDWARE MAINTENANCE.....	- 11 -
F.	GIS MAPPING SYSTEM	- 11 -
V.	<u>GENERAL SOFTWARE DESIGN</u>	- 13 -
1.	APPLICATION DESIGN & EXTENSIBILITY	- 13 -
2.	DATABASE DESIGN.....	- 14 -
3.	APPLICATION INTEGRATION	- 15 -

4. PARCEL/ACCOUNT SEARCH INFORMATION	- 15 -
5. TAXPAYER RECORDS.....	- 16 -
6. COMBINATIONS/SEGREGATIONS/BOUNDARY LINE ADJUSTMENTS.....	- 16 -
7. CORRECTIONS TO THE CERTIFIED ROLL	- 17 -
8. AGENT IDENTIFICATION	- 17 -
9. EVENT TRACKING.....	- 17 -
10. CHANGE LOG ADMINISTRATION.....	- 17 -
11. USER IDENTIFICATION	- 18 -
12. VALUATION NOTICE AUTOMATION	- 18 -
13. CERTIFIED APPRAISAL ROLL AUTOMATION	- 18 -
14. BOARD OF EQUALIZATION PROCESSING (BOE).....	- 18 -
15. INQUIRY TRACKING.....	- 19 -
16. PROTESTS	- 19 -
17. SYSTEM MONITORS	- 20 -
18. LETTER AND FORMS PROCESSING	- 20 -
19. MASS MAINTENANCE AND QUICK ENTRY SYSTEM	- 20 -
VI. <u>ASSESSOR MASS APPRAISAL CAPABILITIES</u>.....	- 21 -
1. REAL PROPERTY VALUATION.....	- 21 -
2. PERSONAL PROPERTY VALUATION.....	- 21 -
3. SALES ANALYSIS.....	- 22 -
4. BUILDING PERMITS.....	- 23 -
5. CURRENT USE/DFL ADDITIONS AND REMOVALS - RCW 84.34 & RCW 84.33.....	- 23 -
6. ONLINE COMPARABLE SALES & COMPARABLE PROPERTY	- 23 -
7. RESIDENTIAL COMPARABLE SALES GRID WITH AUTOMATIC ADJUSTMENTS	- 24 -
8. RESIDENTIAL EQUITY COMP GRID WITH AUTOMATIC ADJUSTMENTS	- 24 -
9. PROFILING	- 25 -
10. GIS CONNECTIVITY.....	- 25 -
11. SKETCH	- 26 -
12. DOCUMENT IMAGING	- 26 -
13. WORKFLOW.....	- 26 -
14. PORTABLE FIELD DEVICES	- 26 -
15. INTERNET CAPABILITIES.....	- 26 -
16. EXPORTING CAPABILITIES	- 27 -
17. MISCELLANEOUS	- 27 -
VII. <u>TREASURER TAX COLLECTIONS CAPABILITIES</u>	- 29 -
1. BILL RECORDS.....	- 29 -
2. IDENTIFICATION OF A TAX BILL	- 29 -
3. MAINTENANCE OF A TAX BILL	- 29 -
4. PAYMENT OF A TAX BILL	- 29 -
5. TAX DISTRICT IDENTIFICATION	- 30 -
6. SPECIAL ASSESSMENT AND LOCAL IMPROVEMENT DISTRICT IDENTIFICATION	- 30 -
7. MORTGAGE COMPANY IDENTIFICATION & PROCESSING	- 30 -
8. MISCELLANEOUS FEE TRACKING	- 30 -
9. REFUND PROCESSING	- 30 -
10. ADVANCE TAX PAYMENT PROCESSING	- 31 -
11. REAL ESTATE EXCISE TAX PROCESSING	- 31 -
12. STATE SUBMISSION REPORTS	- 31 -
13. ROLLS & STATEMENT PROCESSING.....	- 31 -
14. EVENT TRACKING.....	- 31 -
15. RETURNED MAIL PROCESSING	- 32 -
16. MOBILE/MANUFACTURED HOMES AND PERSONAL PROPERTY.....	- 32 -
17. LITIGATION TRACKING.....	- 32 -
18. DISBURSEMENT CHECK PROCESSING	- 32 -

19. INSTALLMENT AGREEMENT PROCESSING	- 32 -
20. REPORTING	- 32 -
21. ROLLEBACKS	- 33 -
22. CODE FILES	- 33 -
23. AUDIT TRAIL ON ACTIVITY	- 33 -
24. ARCHIVE & PURGE	- 33 -
25. MISCELLANEOUS	- 33 -

I. GENERAL INFORMATION

A. OBJECTIVE

The objective of this request for proposals is to acquire and implement a new property assessment administration and tax collection system with fully integrated database functionality shared between the offices of the Island County Assessor and the Island County Treasurer utilizing a modern N-Tier application:

- that will maximize the effectiveness and efficiency of the Assessor's staff and the Treasurer's staff with automation tools,
- that will improve appraisal accuracy and uniformity as well as enhance the ability of the office to compile, analyze, and correlate data,
- that will fully integrate with GIS (geographic information system) technology already being developed by the assessor,
- that will provide timely programming so that the County can more quickly comply with new legislation or court decisions that affect and impact both the assessor and treasurer's offices
- that will provide the County with the tools and flexibility necessary to accommodate the changes that are inherent in offices our size,
- that will enhance the ability of the assessor and treasurer to offer the highest levels of service to both the taxpayers and taxing districts of our county in the most cost-efficient manner, and
- that will allow the County to take advantage of grant monies currently available to help offset the cost of acquiring the hardware and software for the system before they expire or are no longer available

B. INTRODUCTION

The purpose of this document is to provide the Island County Assessor's Office and Treasurer's Office ("The County") with a strategic process to facilitate the acquisition and implementation of an automated property tax and assessment system that complies with the standards outlined above.

The County seeks to better serve its citizens by enhancing communication and improving the effectiveness and efficiency of the entire organization. The County is soliciting proposals for a new, comprehensive, *fully integrated*, software and hardware system to replace the existing assortment of software and hardware currently in use.

The provisions specified in this document will promote an effective evaluation of the available hardware and software alternatives, maximize the benefits to the County, and minimize the costs to the County in terms of time, money, and human resources.

The new system will include, but is not limited to,

- hardware and software needed for computer assisted mass appraisal (CAMA) having features that will better automate the appraisal process including:
 - the application of the three approaches to value, i.e. cost, income, and sales comparison/market data, in a mass appraisal environment and
 - presentation material for boards of equalization and state boards of tax appeals and;
- the comprehensive automation of the administration of the assessor and treasurer's offices in accordance with
 - the Revised Code of Washington (especially Washington Property Tax Code Title 84 RCW),
 - the Property Tax Division of the State Comptroller's Office,
 - the Washington Administrative Code,
 - the Washington Department of Revenue, Washington Attorney General Opinions,
 - decisions of Courts of competent jurisdiction,
 - GAAP (generally accepted accounting principals), and
 - USPAP (Uniform Standards of Professional Appraisal Practice).

The new system will include document archival hardware and software, including

- computer output to laser disk and electronic or enterprise content management (COLD/ERM),
- imaging software, and
- full integration with our current Geographic Information System (GIS) now being developed by the assessor's office.

The terms "new system", "software system", and "new software system", "new comprehensive software and hardware system" will all have the same meaning, as defined by this paragraph, throughout this document.

The County collects receipts and accounts for multiple funds daily, including, but not limited to county roads, cities and towns, county current expense, as well as other senior taxing districts, junior taxing districts, and special purpose districts. These districts include schools, fire, hospital, emergency medical services, library, cemetery, parks and recreation, water and sewer, port districts, and benefit assessment districts that include diking and drainage districts, a mosquito district, conservation districts, and may include other districts that may be formed in accordance with the Revised Code of Washington.

Throughout the year, the County receives property tax payments for properties lying in approximately thirty-six tax code areas that are due on April 30th and October 31st of each year. The County currently has approximately 50,000 active parcels that are serviced by only seventeen assessor's office employees and six and a half treasurer's office employees.

Island County has a population density almost four times the average for the State of Washington. It ranks 5th of the 39 counties in the state, having an average of over 380 people per square mile. Even though it is the next to the smallest county in area (212 square miles), it ranks 14th in overall population in the state (approaching 80,000).

Since 2000, the population growth for persons 65 years of age and above has increased by approximately 41%, the 6th fastest growth rate for that age group. Although the overall growth rate for Island County was only 11%, the increase in the 65+ group has resulted in smaller households and puts Island County in a virtual four-way tie for fourth largest increase in housing units since the year 2000.

The continual expansion in the number of housing units in the County combined with the growing volume of newly created parcels each year, places increasing pressures on members of the assessor's staff who must add new construction to the rolls or process the boundary line adjustments and land segregations that result from this growth.

The increase in applications for the senior citizen/disability exemption has been escalating dramatically, putting additional pressure on the single deputy assigned to that program.

To effectively meet the tenuous requirements that are routinely imposed upon the assessor's office by the legislature and courts and to offset the mounting costs of maintaining higher staffing levels, the County must procure both vendor hardware and vendor software that will enable the assessor to comply with the stringent demands placed upon the office and to effectively and efficiently serve the current and future needs of both the County and its citizens. It is especially important that the proposed system have the capability to accommodate future legislation, advances in technology, and the never-ending growth of the population, the economy, government services, and infrastructure.

The County anticipates the timely acquisition of all required hardware and software agreements, lease purchase agreements or lease agreements. Thus, the vendor should specify the type and cost of each acquisition plan the vendor offers. It is the County's intent to significantly improve and enhance productivity and to control the cost of data processing.

The County is only interested in proposals that offer a total solution for automating all functions of the County. The total solution must also include spreadsheets, form processing, and report generating

capabilities compatible with Washington State laws. The County requires that the vendor be the original author and support organization for all application software.

The County will accept proposals for a turnkey total solution system only. The successful vendor will be considered the prime contractor. The County requires that the prime contractor obtain all necessary hardware and application software licenses, install all hardware, convert the County's databases, and train the County staff.

C. CURRENT TECHNOLOGY INFRASTRUCTURE

Island County's current technology infrastructure includes a server-client based network including WAN & campus LAN. WAN speeds vary from 56K to broadband. LAN speeds are 100/1000 MB with GB fiber backbones campus wide. Server OS includes Windows 2000, 2003 R2. Desktop OS is Windows XP.

II. GENERAL REQUIREMENTS

A. Modern Technology

The reason for procurement is to accommodate the expanded capacities and requirements of the County and secure a system that allows the County to take full advantage of the latest advances in computing and information processing technology within budgetary constraints.

The new system must satisfy the following requirements:

- Be responsive to the functional needs of all departments.
- Be sufficiently flexible in both functional and technical designs to easily accommodate future changes as required by Washington State Legislature, and changes in technology as well as business environment.

Incorporate advances in computing and communications technology, such as:

- Current technology for application development
- Distributed and on-line data entry
- Structured systems design (fully normalized)
- Tools to create ad-hoc reports
- Capability to integrate with Scanning, Imaging, GIS databases, handheld Appraisal applications, and any future relational database compliant products.
- Capability to ftp, import, and export files

B. Compliance

The new relational software must be an integrated system to support mass appraisal and the appraisal related functions according to current Revised Code of Washington (RCW) statutes, Washington Administrative Code (WAC), Washington State Department of Revenue Reports, and USPAP standards.

The new relational software must support the posting and reporting of accounting transactions in accordance with GAAP.

C. Proven and Progressive

The new relational software system is envisioned to represent proven state-of-the-art technology employing features that are on-line, real-time, and within a fully integrated environment. It must provide flexibility and ease of maintenance to effectively handle changes in the County's business rules. Input and inquiry screens should be user-friendly with well-developed, easy to use documentation and on-line help features. Overall, the new system should provide the user with ready access to all necessary information, have a good response time, reduce paper shuffling, provide easy importing and exporting of any and all data and be cost effective to operate.

D. Integration

The key to the new software package will be its ability to fully integrate all of the included components or modules. These components and modules should share information, reduce the need for duplicate data entry, and diminish the unnecessary storing of redundant information. The information stored should be normalized using the Rules of Data Normalization.

E. Innovative

It is required that Vendors offer their best solution to meet the County's system needs as defined in this document. The County will not tailor these needs to fit solutions a particular Vendor may have available. However, the County does encourage innovative ideas for hardware and software that will result in enhanced overall operations for the County.

F. Maintenance

- The Vendor will be required to engineer, design, program, install, convert data, test, and maintain the new system that will provide complete services for the County.

- The County will accept proposals for turnkey total solution systems only.
- Vendor must be the sole responsible party throughout the delivery, installation, training, warranty, and maintenance periods.
- Any subcontractor utilized by the Vendor must be identified in the proposal by a written description of the assignments they will perform.
- A change of subcontractors throughout the installation, warranty, or maintenance periods requires the prior written approval of the County.
- The Vendor will have ultimate responsibility for all subcontractors utilized for this project.
- The Vendor must provide a project manager as a single point of contact for the County throughout the planning and implementation of the project.

III. PROPOSAL EVALUATION PROCEDURE

Six (6) unbound, double-sided copies of the proposal must be received by the County in sealed envelope(s) with proper identification no later than **May 26, 2009 at 4:00 pm**. Requests for extensions of the closing date or time will NOT be granted. Partial bids will not be accepted. Proposals arriving late will not be considered. Vendors should allow sufficient mailing time to insure the timely receipt of the proposal.

Address proposals to:

Dave Mattens
Island County Assessor
1 NE 7th Street
P.O. Box 5000
Coupeville, WA 98239-5000

Mark Envelope: INTEGRATED ASSESSMENT & TAXATION SYSTEM

A. Vendor Information

Vendors must submit information about their organization, including a description of the company, parent or subsidiary status, description of all business activities engaged in by Vendor, number of employees, and a complete list of County customers in Washington.

B. Vendor Business Philosophy

The County will not evaluate offers on technical specifications alone. Equally important is the business relationship between the Client and the Vendor. In order for the County to become more familiar with your company, Vendors must submit the following:

1. Mission Statement
2. Short Term Goal List
3. Long Term Goal List
4. Support Perspective
5. Customization Perspective
6. Software Enhancement Plan
7. Staffing Perspective
8. Legislative Changes Plan
9. Official Business Plan

C. Vendor Background and Qualifications

1. The County will only enter into an agreement for a new system (as outlined in the Introduction) with a Vendor qualified by experience, presenting a proven product, contracted with current customers, and financially stable.
2. The Vendor must be a reputable firm currently capable of performing software installations, conducting data conversions, and providing system support within the State of Washington employing skilled, fully trained technicians capable of achieving a first class installation and conversion in accordance with standard industry practices.
3. All Vendor technicians must be experienced with the programs and equipment they are to install and /or support. The technician working with the County must have completed at least one full conversion project within the last two years.
4. The Vendor must have installed, converted, supported and maintained the product(s) offered to the County for a client for a minimum of two (2) years. The vendor must be able to accommodate a County and project of our size or greater.

D. Manufacturer Affiliation

1. Vendor must be the original author and developer of the source code offered for the software system.
2. Vendor must submit information about their organization, including a description of the company, parent or subsidiary status, description of all business activities engaged in by the Vendor, the total number of employees and the total number of employees dedicated to Washington Counties.

E. Reference List

1. In order to meet the long-term requirements of the County, the prospective vendors must demonstrate their experience in Property Tax Administration applications. The vendors should include a list of all county assessor and treasurer offices currently running the proposed application software.
2. Vendor must provide written references from a minimum of three (3) clients. Each reference solicited must be a paying customer external to the 'Vendor's organization. The Vendor must have supported and maintained the referenced systems.
3. The Vendor must have been the original developer of the referenced systems. Include company/organization name and address of installations, description of software installed (including number of servers, installation date, number of parcels) and the name and telephone number of the contact person.
4. Vendor must provide names, addresses, and contacts for any client vs. Vendor and/or Manufacturer litigation for the past three (3) years (including any current litigation).

F. Registration of Vendor

Any corporation conducting business with the County shall be on file with the Secretary of State, State of Washington, as being incorporated under the Washington Business Corporation Act, or, if a foreign corporation, have procured a certificate of authorization for the right to transact business within the State. If Vendor is a limited partnership, it shall have on file with the Secretary of State, its certificate for the formation of a limited partnership as required by the Washington Uniform Limited Partnership Act, RCW 25.10. Vendors shall provide their certificate of registration number on the proposal sheet.

G. Submission of Proposals

Vendors desiring to submit proposals in response to the request must comply with all mandatory submission requirements set out in this document. Failure to comply with any section will subject the proposal to immediate rejection. However, any mandatory submissions are not the sole requirements. All conditions and requirements throughout this request are considered binding. Vendor shall include a list of all customers using Vendor's system similar to that which is being proposed.

H. Multiple Proposals

A Vendor may submit more than one proposal. At least one of the proposals shall be complete and comply with all requirements. However, additional proposals may be abbreviated in form, using the same format, but providing only that information that differs in any way from that contained in the initial proposal. Each proposal must be separately bound and contracts separately identified.

I. Authorization to Bid

An individual who is authorized to act on behalf of the Vendor must sign all proposals, attachments to proposals and/or documents submitted with this proposal.

J. Submission of Vendor Contracts

A proposal must include contract forms that the Vendor intends to use during contract negotiation. However, in making a contract award, the County shall not be bound by any conditions as necessary. The County may, however, reject any proposals where contractual terms are deemed unreasonable.

K. Vendor Inquiries

Any inquiries from Vendors concerning this proposal shall be submitted in writing to:

Dave Mattens
Island County Assessor
P.O. Box 5000
Coupeville, WA 98239-5000
davem@co.island.wa.us
FAX No.: 360.240.5565

L. Proposal Cost Errors

Vendors are expected to thoroughly examine all proposed specifications and all instructions. Preparation of cost extensions shall be at the Vendor's risk. In the event of a Vendor error in any cost extension, the Vendor's unit price will prevail.

M. Product Information

Complete product information and descriptive literature shall be submitted with the proposal. Information submitted shall be sufficiently detailed to substantiate that offered products meet or exceed the required specifications. All information submitted according to this requirement will be incorporated by reference into the contract document arising out of Vendor's response and may be subject to express contract warranties.

N. Benchmark Criteria

Qualified Vendors may be asked to demonstrate their products to the County. Vendors selected for product demonstrations must demonstrate that their product meets their response to the proposal. Failure to demonstrate that the product meets specifications will cause rejection of Vendor's proposal.

O. Installation, Integration and Testing

Vendors shall provide an installation, implementation, and testing schedule for hardware, application software, database conversion, and training with the proposal. All hardware purchased shall be installed within sixty days of contract award unless otherwise specified by the County.

Vendor's installation, implementation and testing plan shall describe the integration and testing of hardware, software, and databases of the proposed system. All application software and operating system software shall be installed sixty days after contract award unless otherwise specified by the County. After completion of testing, training on application software will begin as defined in the Vendor proposed installation plan.

P. Proposal Evaluation

The County will evaluate all proposals. Proposals that do not meet mandatory requirements shall be rejected. Proposals meeting the mandatory requirements shall be further evaluated on overall costs and ability to meet the long-term needs of the County. The term "overall costs," as used in this paragraph, shall be interpreted to include – but not be limited to – product price plus the cost of installation, conversion, training, hardware expansion, and facility modifications required to house and operate the hardware.

Q. Rejection of Proposals

The County reserves the right to reject any and all proposals received. The County does not intend to pay for information solicited or contracted for prior to entering into a contract with the successful Vendor.

The County reserves the right to waive minor deviations in proposals providing such action is in the best interest of the County. Minor deviations are defined as those that have no adverse effect upon the County's interest and would not affect the amount of the proposal by giving a Vendor an advantage or benefits not enjoyed by other Vendors.

The County reserves the right to reject any or all proposals, to waive technicalities or formalities, and to accept any proposal deemed to be in the best interest of the County. If the County receives no valid

proposals, the County reserves the right to negotiate on the best terms and conditions at the best possible prices.

R. Legal and Contractual Issues

The County requires a contractual agreement that fairly represents the rights and obligations of all parties to the contract. The following questions and statements are intended to elicit several key contract issues. Therefore, all of the questions in this part must be answered completely for the Vendor's proposal to be considered by the County. If a Vendor has included copies of proposed sample contracts, the Vendor must identify the page and section of the contract that is responsive to each of the following questions and statements.

1. Terms of Payment

When will Vendor require the price for the system to be paid? Explain completely, including any payment schedules and alternatives.

Will the agreement include provisions imposing interest or finance charges on late payments by user? If so, how will billing disputes be handled? Please explain.

2. Delivery

The agreement shall include a binding delivery schedule consistent with the terms of this proposal request.

Specify the method of delivery and installation. Explain, indicating the party or parties responsible for performing and/or paying for each step involved.

Vendor must warrant that all equipment purchased under this proposal is free and clear of all liens.

3. Acceptance

All items purchased under this proposed request will be accepted only when all terms and any contracts arising from the proposal are met and the system is fully operational and in use by the County. Specify, if any, the specific acceptance criteria the Vendor may have.

4. Assignment, Use and Resale

Will the agreement or any related maintenance agreement include any restrictions on assignment of the agreement (I) by the user, and (II) by the Vendor? Explain.

Will the agreement or any related maintenance agreement include any restrictions on the unconditional use by the user of the software? Explain, including any applicable reference to restrictions, lease and resale.

5. Termination

Under what circumstances, if any, can the user or Vendor terminate the agreement? Explain, including any penalties.

6. Execution Authority and Legal Assistance

Specify by name and title the individual or individuals within the Vendor's organization that presently have legal corporate authority to execute the agreement and any related agreements (including any amendments) on behalf of the Vendor.

7. Product Warranty

Complete product warranty information shall be submitted with the proposal. All manufacturers' warranties must be passed to the County. Unless otherwise specified in the proposal, all equipment must be warranted as new and unused.

IV. PROPOSAL REQUIREMENTS

A. Hardware for the Assessor's Office	Hardware for the Treasurer's Office
<u>1</u> Server(s) <u>8</u> Tablet/convertible data collection units <u>2</u> Document Scanners _____ Installation, cabling, etc. _____ Vendor Recommendations	<u>1</u> Server(s) <u>6</u> Receipt printers <u>1</u> Check Scanner <u>3</u> Check validators _____ Installation, cabling, etc. _____ Vendor Recommendations

B. Software

50,000	Number of parcels
50,000	Number of Property Tax Bills
17	Number of Appraisal users
7	Number of Treasurer users

Your proposal must include database application costs of client/server for appraisal and collections system. All proposals should include cost of the license and unit cost of next license agreement. Proposal should include a detailed explanation of how the operating system conforms to all major international standards.

C. Training

All proposals must include sufficient training to insure a successful installation. The proposal must specify the number of training days, the location and cost of each training session. Each training session may include a portion of or all staff members.

D. Installation and Conversion

The Vendor should specify the amount of time required for the installation and conversion process. Responsibilities of the County must be specified for the County's assistance in installation, cabling, database conversion and training.

E. Software/Hardware Maintenance

The County will require a written hardware and software maintenance agreement for an agreed upon period of time. The Vendor may subcontract the hardware maintenance, but the County will hold the Vendor responsible for all maintenance services. Any additional documentation that will assist the County in evaluating the maintenance agreement should be included.

F. GIS Mapping System

A critical element in the implementation of a total solution package is the communication of data between the proposed Assessor & Treasurer system and the County GIS Mapping System. The chosen Vendor must be able to demonstrate the ability to transfer files and integrate data with the GIS System. The Vendor must provide customer sites that are currently utilizing the interface. Failure to respond to this item may be grounds for rejection of the proposal.

A RESPONSE TO ALL REQUIREMENTS IS MANDATORY

Instructions:

1. Answer each question “YES” or “NO”. A “YES” answer indicates that your software provides all capabilities or meets all of the requirements set forth in the statement or question.
2. If you answer NO to any question, but you are willing to modify your proposed system to provide the requested capability, enter the estimated cost to provide the requested capability.
3. If you answer NO to any question and are not willing or not capable of modifying the proposed system to provide the requested capability, leave the “Cost to Modify” space blank.

V. GENERAL SOFTWARE DESIGN

1. Application Design & Extensibility	YES	NO	Cost to Modify
<i>It is very important for the County to ensure vendors use the latest development tools to facilitate quick updates when tax legislation is passed and not have an effect on maintenance costs.</i>			
<p>1.1. Is the application written with an open architecture and extensibility design? This would give the integrated visual design with code generation and dynamic assembly creation. And this would give the end use the ability to extend the application.</p> <p>As you answer the questions below, please note that the proposed system is intended to give authorized end-users the ability to add custom fields, custom menus, custom panels, custom field validation and custom reports without the need for the vendor to get involved and without the need for special programming to take place. We would like to know if your application supports end-user custom extensions as indicated below.</p>			
1.1.1. Does the application allow for the addition of fields to the “Property” table and have the custom field be available for display on the property data entry panels and/or property reports?			
1.1.2. Does the application allow for the addition of fields to the “Land” table and have the custom field be available for display on the land data entry panels and/or land reports?			
1.1.3. Does the application allow for the addition of fields to the “Improvement” table and have the custom field be available for display on the improvement data entry panels and/or improvement reports?			
1.1.4. Does the application include an integrated visual screen designer for the customization of screen layouts, panels, field positioning and field ordering?			
1.1.5. Does the integrated visual screen designer allow for the customization of the navigation menu interface?			
1.1.6. Does the application include an integrated report designer for the purpose of creating custom reports?			
1.1.7. Does the application allow for the custom reports created through the integrated report designer to be launched from the application user interface?			
1.1.8. Does the application allow custom data validation at the field level?			
1.2. Is the application written for an n-tier computing environment?			
1.3. Does the application support distributed processing server technology?			
1.4. Does the application scale through the use of job servers?			
1.5. Does the application allow for a fully redundant Windows & SQL Clustering solution to minimize downtime?			
1.6. Does the application take advantage of object development tools?			
1.7. Testing and Quality Assurance: Does the application support automated testing tools? An application with this kind of support would be far more stable due to the rigorous automated regression testing that takes place before the release is rolled out. This is especially true if the automated testing tools are embedded in the application. If so.			
1.7.1. Does the application support embedded scripts for automated testing tools?			
1.7.2. Using the embedded script support, does the application allow for remote calls to its user interface?			

1.7.3. Using the embedded script support, does the application allow the use of this scripting language for training purposes?			
1.8. Is the application using a Non-Blocking design? By this we mean, does it allow for background processing of long running processes or reports and not block the user from going on to the next task as the report or process runs.			
1.9. Does the application have dynamic font support? Does it allow for the font size to be changed by the user to improve read-ability within this application only? Please note that changing font size at the windows level does not satisfy this requirement.			
1.10. Is the GUI a Windows forms based application that provides a rich user experience with uncompromised data entry capabilities?			
1.11. Does the application have online help? If so...			
1.11.1. Is the help context-sensitive?			
1.11.2. Is the online help updated with every product release?			
1.11.3. Are online help windows available for input fields where values come from supporting tables?			
1.12. Does the application use a generally available report writer for all its forms and reports?			
1.13. Can the data be exported using industry standard formats?			
1.14. Is the application installed using standard methods in their respective platforms?			
1.15. Are new releases downloadable from the vendor's website?			
1.16. Are updates and fixes available for download from the vendor's website?			
1.17. Can a new release, update or fix be emailed to the user for installation?			
1.18. Does the application have tooltips enabled for all fields on the screens? The tooltip must at a minimum show the database, table and field name information. It should also include a small sample of how the data is stored. This would be of great benefit to the user when querying data from the database.			

2. Database Design	YES	NO	Cost to Modify
2.1. Does the application maintain a one-to-many relationship between the owner table and the property/parcel table? (Can an owner have multiple properties?)			
2.2. Is the database integrated between appraisal and collections? (if applicable) If so...			
2.2.1. Can the appraisal application view collections information?			
2.2.2. Can the collections application view appraisal information?			
2.2.3. Can document images be shared between applications?			
2.2.4. Can events such as litigation and BOE be shared between applications?			
2.2.5. Do the applications share the same Tax Code Area tables?			
2.2.6. Do the applications share the same levy or rate tables?			
2.3. Does the application maintain a complete set of appraisal history per tax year? If so...			
2.3.1. Is this accomplished without intervention by technical support personnel?			
2.3.2. Does this include land and improvement detail appraisal information?			
2.3.3. Does this include building rate schedules by tax year?			
2.3.4. Does this also include neighborhood adjustments by tax year?			
2.3.5. Does this also include subdivision adjustments by tax year?			
2.3.6. Does this also include cost multipliers and local multipliers by tax year?			
2.3.7. Does the application allow for calculations of value to be performed on a previous year account?			
2.4. Does the application capture a complete set of appraisal information when a property is sold?			
2.4.1. If so, does this include land and improvement detail appraisal information?			
2.4.2. Can land and improvement detail information be modified without affecting current values?			
2.5. Does the application allow for calculations of value to be performed on appraisal information captured at the time of sale?			
2.6. Is the database SQL-compliant? If so...			
2.6.1. Can it be accessed using generally available ODBC drivers?			

2.7. Can it access other SQL-compliant databases such as GIS servers?			
2.8. Is the complete data-dictionary available for querying?			

3. Application Integration	YES	NO	Cost to Modify
3.1. Does the system integrate with the following applications:			
3.1.1. Maps Objects for GIS?			
3.1.2. Microsoft Word for letter processing?			
3.1.3. Microsoft Excel for worksheet processing?			
3.1.4. Microsoft Access			
3.1.5. Pictometry for ortho imagery?			
3.1.6. Crystal Reports for reporting services?			
3.1.7. Third party sketch tools?			
3.1.8. ARC objects for enhanced GIS functionality?			
3.1.9. Windows Workflow Foundation?			
3.2. Does the application integrate with the following email systems:			
3.2.1. POP3?			
3.2.2. Microsoft Exchange?			
3.2.3. Microsoft Outlook?			

4. Parcel/Account Search Information	YES	NO	Cost to Modify
4.1. Can the Parcel/Account be accessed by			
4.1.1. Account Number?			
4.1.2. Geographic Number?			
4.1.3. Account Type (Real, Personal, Mineral, Mobile Home, Auto)?			
4.1.4. Account Sub Type (user defined)?			
4.1.5. Situs?			
4.1.6. Subdivision, Block, Lot?			
4.1.7. DBA?			
4.1.8. Map ID?			
4.1.9. Building Permit Number?			
4.1.10. Mineral Lease Number?			
4.1.11. Owner/Taxpayer ID?			
4.1.12. Owner/Taxpayer Name?			
4.1.13. Owner/Taxpayer First Name?			
4.1.14. Owner/Taxpayer Last Name?			
4.1.15. Owner/Taxpayer Mailing Address?			
4.1.16. Previous Taxpayer Name?			
4.1.17. Agent's ID?			
4.1.18. Agent's Name?			
4.1.19. Agent's First Name?			
4.1.20. Agent's Last Name?			
4.1.21. Agent's Mailing Address?			
4.1.22. Tax Code Area?			
4.1.23. Special Assessment Agency?			
4.1.24. Primary Property Use Code?			
4.1.25. Property Group Codes?			
4.1.26. Recording Number?			
4.1.27. Standard Industrial Code?			
4.1.28. Mobile home Serial, Title or HUD number?			
4.1.29. Linked Properties?			
4.1.30. Deleted or Preliminary Properties?			
4.1.31. Improvement Type?			
4.1.32. REET Excise Number?			
4.1.33. REET Recording Number?			

4.1.34. Deed – Book/Page			
4.1.35. Secondary Property Use			
4.1.36. Property Link Type			
4.1.37. ANY COMBINATION OF THE ABOVE?			
4.2. Can the property search results be exported to Excel, HTML, CSV or TXT formats?			
4.3. Can a property be bookmarked for later retrieval?			
4.4. Does the system maintain a history of properties accessed so the user can refer to the list of recently accessed accounts?			
4.5. Are property descriptions maintained distinctly by year?			
4.6. What is maximum number of Tax Code Areas that are allowed by account?			
4.7. What is the maximum number of exemptions allowed: _____			
4.7.1. System wide?			
4.7.2. Per Account?			
4.8. Can an account be inactivated? (Deleted?) If so...			
4.8.1. Can it be recovered at a later date?			
4.9. Does the recovery process restore the original improvement and land appraisal information?			
4.9.1. If so, is a history of permits maintained?			
4.10. Does the system support an unlimited number of land detail records?			
4.11. Does the system support an unlimited number of improvement detail records?			
4.12. Does the system support multiple Situs Addresses?			
4.13. Does the system support multiple Doing Business As (DBA)?			
4.14. Can the System export search results?			
4.15. Can the System perform a mass update on search results?			
4.15.1. Does the mass update feature allow for efficient large scale changes to account data?			
4.16. Can the System search using: Begins With?			
4.17. Can the System search using: Contains?			
4.18. Can the System search using: Sounds Like?			

5. Taxpayer Records	YES	NO	Cost to Modify
5.1. Does the system support multiple addresses per taxpayer?			
5.2. If so, does the system allow the user to indicate which address is for mailing?			
5.3. Does the system support multiple phone numbers per taxpayer?			
5.4. Does the system support CASS Certification information?			
5.5. Does the system allow for document images be scanned or attached to taxpayer records?			
5.6. Does the system allow for identification or flagging of “confidential” owners such as police officers?			

6. Combinations/Segregations/Boundary Line Adjustments	YES	NO	Cost to Modify
6.1. Does the system provide the ability to segregate property through the use of a Help Wizard?			
6.1.1. If so, can the user see all history involved with all splits of a property?			
6.2. Does the system provide the ability to combine property through the use of a Help Wizard?			
6.2.1. If so, can the user see all history involved with all property merges?			
6.3. Does the system provide a method to track value changes resulting from combinations, boundary line adjustments, or divisions of property?			
6.4. Does the system provide the ability to perform Boundary Line Adjustments through the use of a Help Wizard?			
6.4.1. If so, can the user see all the history involved with all Boundary Line Adjustments?			

7. Corrections to the Certified Roll	YES	NO	Cost to Modify
7.1. Does the system keep certified history online?			
7.1.1. If so, how many years of certified history does the system track? _____			
7.2. Does the system allow for online corrections, additions or deletions to the certified roll?			
7.2.1. If so, how many years can be modified online? _____			
7.3. Does the system have an automated process of transferring changed information to collections for bill adjustments to take place?			
7.3.1. If so, how many years can be “transferred” to collections? _____			
7.4. Does the system keep full appraisal information by year online? By this we mean: does the system keep a full complement of land, improvement, and business personal property information by year?			
7.4.1. If so, can a property be “recalculated” for a prior year without affecting current values?			
7.5. Does the system print a supplemental roll listing all property involved in the corrections?			
7.5.1. Can this roll be grouped by Tax Code Area?			
7.5.2. Can this roll be grouped by year?			
7.5.3. Can this roll be grouped by supplemental action? (i.e. adds, changes, deletes)			
7.5.4. Does this roll print a summary totals page indicating the gains or losses for each Tax Code Area between two selected dates?			
7.5.5. Can this roll be re-printed on demand?			
7.5.6. Can this roll be re-printed even if subsequent rolls have been accepted?			
7.5.7. Does the system generate an Adjusted History Total after each supplement?			
7.5.8. Can multiple supplement groups be opened at the same time?			
7.6. Does the system allow for a “future supplement” to be started allowing for the (future date) 30-day notice requirement?			

8. Agent Identification	YES	NO	Cost to Modify
8.1. Can agents be created on the system?			
8.2. Can multiple agents be assigned to one parcel?			
8.3. Can multiple parcels be assigned to one agent?			
8.4. Can authorities be defined on an agent for a parcel?			
8.5. Does the system allow for document images be scanned or attached to agent records?			

9. Event Tracking	YES	NO	Cost to Modify
9.1. Does the system track all system-defined events for a property such as notice generated, appraisal card generated, etc.? If so.			
9.1.1. Does the system keep an exact copy of the appraisal notice that was generated?			
9.1.2. Does the system keep an exact copy of the tax statement that was generated?			
9.2. Does the system allow for user-defined events?			
9.3. Does the system display in a chronological order the events attached to a property?			
9.4. Does the system allow the user to see events from the tax collections system for a property?			
9.5. Does the system allow the user to see the appraisal and collections events for a property at the same time?			
9.6. Does the system allow the user to attach any Windows objects (i.e., video, images, and audio file) to an event for a property?			

10. Change Log Administration	YES	NO	Cost to Modify
10.1. Does the system allow identification of fields to be tracked when changed?			
10.2. If so, does the system allow viewing of all changes made to the fields being tracked?			
10.3. If so, does the system show a before and after picture of the fields that change?			

10.4. Does the system track changes to records even when performed outside of the application such as an update statement using SQL?			
10.5. Does the system track identity of user when they make any change permanently?			

11. User Identification	YES	NO	Cost to Modify
11.1. Does a person need a user ID to access the system?			
11.2. Is a user ID password validated?			
11.3. Can a user be created to only have specific functions available to them on the system?			
11.4. If so, are all functions on the system specified at the user level or a user role level?			
11.5. Does the system allow for selection of different databases to log into as in the case when using a training database and a live database?			

12. Valuation Notice Automation	YES	NO	Cost to Modify
12.1. Does the system include a comprehensive valuation notice selection wizard?			
12.2. Can the valuation notice form be laser printed in-house?			
12.3. Can the valuation notice form be exported to an ASCII file?			
12.4. Does the system allow for notices to be mailed by property type (i.e. Real property go first versus Personal Property)?			
12.5. Does the system provide the ability to code a property that will FORCE a notice to be mailed to this property during the Valuation Notice selection process?			
12.6. Does the system provide the ability to code a property that will EXCLUDE the property from being selected for notification during the Valuation Notice selection process?			
12.7. Does the system create an event indicating that a notice was mailed to the property owner or agent?			
12.8. Does the system automatically store an image of the appraisal notice that was mailed to the property owner or the agent?			
12.9. Does the system record "BOE values" system wide at the time the appraisal notices are printed to serve as a reference point for comparison during the appeal period?			
12.10. Does the system allow for custom queries to be used to selectively code properties to FORCE a notice to be mailed to this property during the Valuation Notice selection process?			

13. Certified Appraisal Roll Automation	YES	NO	Cost to Modify
13.1. Does the system allow for certifying the roll in less than 5 hours?			
13.2. Does the system print certified totals by Tax Code Area and Tax Districts with a separate total for "Under BOE Review" items?			
13.3. Can the appraisal roll be printed in-house with duplex capability on laser printers?			
13.4. Can the new year creation and commencement of work begin immediately after certification?			
13.5. Does the system print the State Reports in Laser Forms?			
13.6. Does the system export in the state required format for submission to the state?			

14. Board of Equalization Processing (BOE)	YES	NO	Cost to Modify
14.1. Does the system have a Board of Equalization package?			
14.2. Does the BOE package provide scheduling tools?			
14.3. Can the user search by Property ID?			
14.4. Can the user search by Case ID?			
14.5. Can the user search by hearing date?			
14.6. Can the user search by appraiser?			
14.7. Can the user search by Status?			
14.8. Can the user search by Inquiry type?			

14.9.	Can the user search by Date range?			
14.10.	Can the user search by BOE Panel?			
14.11.	Can the user search by status?			
14.12.	Does the BOE package keep track of all letters printed?			
14.13.	Does the BOE package allow for multiple properties on one protest?			
14.14.	Does the BOE package allow for scheduling for appraisers and BOE hearing?			
14.15.	Does the BOE package keep the minutes of the meetings and the voting results and motions?			
14.16.	Can the user print a schedule for Appraiser meetings?			
14.17.	Can the user print a schedule for the BOE meetings?			
14.18.	Are all codes user defined and maintainable?			
14.19.	Is the BOE data kept by year indefinitely?			
14.20.	Does the BOE package capture digital audio (MP3 format) directly to the BOE record?			
14.21.	Does the BOE package automatically generate a sales comp grid based on pre-defined parameters?			
14.22.	Does this sales comp grid also have automatic adjustments of sales comp to subject to come up with an indicated value?			
14.23.	Does the BOE package allow for a paperless BOE presentation showing protest information, sales comp grid, GIS comp grid?			
14.24.	Is the BOE recorded information attached to a parcel number and available to all designated users?			

15. Inquiry Tracking		YES	NO	Cost to Modify
15.1.	Does the system support workflow enabled inquiry tracking?			
15.2.	Does the system have a way to track general inquiries from property owners or inquiries?			
15.3.	Are the inquiries stored by year in chronological order?			
15.4.	Can these inquiries be scheduled by appraiser?			
15.5.	Does the system store the beginning value and the ending value for the inquiry?			
15.6.	Does the system use an automated letter processing system to print personalized form letters to the property owner or agent?			
15.7.	Does the system automatically save an image of any letter mailed to property owner or agent?			
15.8.	Does the system support letter processing “templates” that allow for the routing of letters and forms to specific printers in the office?			
15.9.	Does the system track events related to a particular inquiry?			
15.10.	Does the system allow for any windows object be attached to an inquiry event? Windows objects such as video clips, audio recordings, etc.?			
15.11.	Does the system track a change log associated with the inquiry tracking system?			
15.12.	Does the system allow for document images to be scanned or attached into an inquiry record?			
15.13.	Does the system automatically generate a sales comp grid with automatic adjustments and weighted to the subjects characteristics?			
15.14.	Does the system allow for an online search for inquiry records?			
15.15.	Can this online search be customized by date, appraiser, status, sign-in time etc..?			
15.16.	Does this search allow configuration to automatically refresh at a pre-defined interval for monitoring purposes?			
15.17.	Does this system have any reports associated with the inquiry tracking system?			

16. Protests		YES	NO	Cost to Modify
16.1.	Does the system support workflow enabled appeals			

17. System Monitors	YES	NO	Cost to Modify
17.1. Does the application have a way to configure a generic query, stored procedure or view and display the results in a column or window within the application?			
17.2. Does the application have a way to configure a generic query, allowing columnar displays, columnar display totals only, or both to be printed?			
17.3. Does this 'monitor' allow for user assignment configuration?			
17.4. Does this 'monitor' allow for time-interval configuration?			

18. Letter and Forms Processing	YES	NO	Cost to Modify
18.1. Does the system have an integrated method of producing mail-merge type letters to property owners, agents, Taxing Districts, mortgage companies and attorneys?			
18.2. Does this letter processing system utilize an industry-standard word processor such as Microsoft Word?			
18.3. Can the mail-merge function be called from within the appraisal application?			
18.4. Does the letter processing system display all available fields that can be used for mail-merge features?			
18.5. Does the letter processing system automatically save an image of the document that is printed or mailed to the property owner, agent, taxing district, mortgage company, or attorney?			
18.6. Does the system have an integrated forms processing system that will automatically identify the document being scanned using a barcode and assign it to the bar-coded account?			
18.7. Does this forms processing system identify the business personal property listing form?			
18.8. Does this forms processing system identify the Notice of Appeal form?			

19. Mass Maintenance and Quick Entry System	YES	NO	Cost to Modify
19.1. Does the system have a separate entry system for fast data entry of information as processed by data entry operators without the use of the mouse?			
19.2. Does this data entry system allow for function keys to be assigned to repetitive functions?			
19.3. Does the system have a separate mass maintenance system for data entry of information in mass using queries or pre-defined parameters such as subdivision code, geo number ranges, etc?			
19.4. Can the Mass Maintenance be involved from a GIS application within the CAMA system?			

VI. ASSESSOR MASS APPRAISAL CAPABILITIES

1. Real Property Valuation	Yes	No	Cost to Modify
1.1. Does the application maintain totally separate appraisal information including related schedules and valuation data by tax year?			
1.2. Are user-defined schedules used to value?			
1.2.1. If so, are all schedules completely user-maintainable?			
1.3. Are improvement features user-definable? (i.e. interior, exterior, fireplace, etc)			
1.3.1. If so, is the number of user-definable features unlimited?			
1.4. Are the user-definable features used to effect value?			
1.5. Which of the following units of measurements can be used to value:			
1.5.1. Square footage?			
1.5.2. Acreage?			
1.5.3. Front footage?			
1.5.4. Lot depth?			
1.5.5. Length / width?			
1.5.6. Wall Height?			
1.5.7. Area Perimeter			
1.5.8. Percentage of main area value?			
1.5.9. Percentage of main area dollars per square foot?			
1.5.10. User-Definable Features?			
1.5.11. Flat Value Pricing			
1.6. Does the application allow the valuation of commercial properties using Marshall & Swift?			
1.7. Does the application allow for an unlimited number of land and improvement adjustments?			
1.7.1.1. If so, are the adjustments code-driven?			
1.7.2. Can the adjustments be identified as percentage or value adjustments?			
1.7.3. Can a description be saved describing each adjustment?			
1.8. Does the application allow mass value modifications by means of:			
1.8.1. Neighborhood?			
1.8.2. Subdivision?			
1.8.3. Cost Multiplier?			
1.8.4. Local Multiplier?			
1.8.5. If so, will changing the value of any of the above mass modifiers flag the associated properties automatically for mass recalculation without user intervention?			
1.9. Does the system support the Income Approach to valuation?			
1.10. Does the system allow for 'confidential' income information to be kept separate as required in Washington State?			

2. Personal Property Valuation	Yes	No	Cost to Modify
2.1. Does the system allow for multiple personal property segments (i.e. inventory, furniture & fixtures, etc.) on a personal property account?			
2.2. Does the system allow for unlimited valuation methods using state-defined schedules?			
2.3. Does the system allow for user-defined local schedules?			
2.4. Does the system allow for unlimited years of rendered information?			
2.5. Does the system allow for the value to be assigned based on a selection of multiple values (i.e. unlimited state-defined or user-defined schedules, prior year value, rendered value, etc.)?			
2.6. Does the system allow the user to define codes?			
2.7. Does the system allow for the application of depreciation schedules?			

2.8. Does the system allow the user to define quality and density on a personal property segment?			
2.9. Does the system provide an asset management system for easy update of assets?			
2.10. Does the system support the concept of “sub-segments” where multiple assets of the same type can be grouped together and value is rolled up to the segment level?			
2.11. Does the system allow for a rolled up value to be overridden by the user?			
2.12. Does the system allow individual assets to be flagged as exempt (farm assets)?			
2.13. Does the system allow individual assets to be totaled differently (exempted) for a taxing district within a tax code area?			
2.14. Does the personal property valuation allow for an unlimited number of personal property detail records?			

3. Sales Analysis	Yes	No	Cost to Modify
3.1. Does the application provide for the retention of sales history?			
3.1.1. If so, how many instruments can be retained: _____			
3.2. Are these instruments displayed in chronological order?			
3.3. Does the application allow for multiple sales to be recorded on one account?			
3.4. Does the application allow for multiple properties within one sale record?			
3.4.1. If so, does it combine the market values of properties before comparing to sale price?			
3.5. Does the application allow for land-only and improvement-only indicators on sale records?			
3.5.1. If so, does it only use the value indicated when comparing to sale price?			
3.6. Is sales financing information stored with sale records?			
3.7. Can comparable sales be extracted using user-definable criteria?			
3.8. Can comparable sales grids be created in mass using scoring defined by the client?			
3.9. Can individual comparable adjustments made by the system be overridden?			
3.10. Can comparable grid layouts be customized per client and per user?			
3.11. Can scoring of comparables be customized by the client and by the user?			
3.12. Can the system automatically generate a best fit GIS map with the subject and selected comparables highlighted and labeled?			
3.13. Can the grid show the calculations of each comparable adjustment?			
3.14. Does the system allow for separate sale and equity searches for Residential, Commercial, and Land?			
3.15. Can the client and user design separate grids for Sales and Equity analysis??			
3.16. Which of the following statistics are reported on comparable sales in the application:			
3.16.1. Mean?			
3.16.2. Median?			
3.16.3. Variance?			
3.16.4. Standard Deviation			
3.16.5. Coefficient of Dispersion?			
3.17. Does the system application allow the application of multiple regression analysis, either through an embedded procedure or through the use of SPSS?			
3.18. Does the system application provide assessment to sales ratio analysis?			
3.18.1. Calculation of individual ratios using historical or current assessed values.			
3.18.2. Application of Time Adjustments to Sales?			
3.18.3. Arithmetic Mean?			
3.18.4. Weighted Mean?			
3.18.5. Median?			
3.18.6. Coefficient of Variation (COV)?			
3.18.7. Coefficient of Dispersion (COD)?			
3.18.8. Price Related Differential (PRD)?			
3.18.9. Std Error?			
3.18.10. Std Deviation (for a sample)?			

3.18.11. Average Absolute Deviation?			
3.18.12. Variance?			
3.18.13. Range?			
3.18.14. Ratio trending?			
3.18.15. Histogram?			

4. Building Permits	Yes	No	Cost to Modify
4.1. Does the system support building permits?			
4.2. Can permits be located by Permit Number?			
4.3. Can permits be located by Permit Type?			
4.4. Can permits be located by Appraiser Assigned?			
4.5. Can permits be located by Property Owner?			
4.6. Can permits be located by Property ID?			
4.7. Can permits be located by Situs?			
4.8. Can a report be printed of building permits?			
4.9. Can a report be printed for specified building permits?			
4.10. Can permits be coded active or inactive?			
4.11. Can permits be coded with multiple properties?			
4.12. Do permits have a date worked?			
4.13. Do permits have a date completed?			
4.14. Do permits have percent complete?			
4.15. Can permits be imported from other types of files?			

5. Current Use/DFL Additions and Removals - RCW 84.34 & RCW 84.33	Yes	No	Cost to Modify
5.1. Does the system provide a quick, easy, user-friendly process for adding and removal of Current Use and DFL parcels? (Current Use and DFL)			
5.2. Does the system do all calculations automatically for all types of Current Use and DFL removals?			
5.3. Does the system allow multiple Current Use and DFL removals on a property at a time?			
5.4. Does the system provide a calculation worksheet to be given to the taxpayer?			
5.5. Does the system provide a way of providing estimates of Current Use and DFL removals?			
5.6. Does the system provide an audit trail for the taxes added as a result of Current Use and DFL removals?			

6. Online Comparable Sales & Comparable Property	Yes	No	Cost to Modify
6.1. Does the system allow for comparable sales to be found online? If so, does the criterion include the following:			
6.1.1. Can comparable sales be located by Tax Code Area?			
6.1.2. Can comparable sales be located by Abstract or Subdivision Code?			
6.1.3. Can comparable sales be located by Neighborhood Code?			
6.1.4. Can comparable sales be located by Subset Code?			
6.1.5. Can comparable sales be located by Map ID?			
6.1.6. Can comparable sales be located by School Code?			
6.1.7. Can comparable sales be located by City Code?			
6.1.8. Can comparable sales be located by Improvement Class?			
6.1.9. Can comparable sales be located by Living Area?			
6.1.10. Can comparable sales be located by Improvement Year Built			
6.1.11. Can comparable sales be located by Improvement Unit Price?			
6.1.12. Can comparable sales be located by Improvement Additive Value?			
6.1.13. Can comparable sales be located by Land Type?			
6.1.14. Can comparable sales be located by Land Area?			

6.1.15. Can comparable sales be located by Land Area Type?			
6.1.16. Can comparable sales be located by Land Unit Price?			
6.1.17. Can comparable sales be located by Sale Type?			
6.1.18. Can comparable sales be located by Sale Date?			
6.1.19. Can comparable sales be located by Sale Price?			
6.1.20. Can properties be identified in the GIS application and have the search criteria applied to the properties identified?			
6.1.21. Can comparable sales be located by Primary Use (Property Use?)			
6.1.22. Can comparable sales be located by Zoning (Primary and/or Secondary)?			
6.1.23. Can comparable sales be located by DOR Land Use Code and/or local Land Use codes?			
6.1.24. Can comparable sales be located by Tax Code Area?			
6.1.25. Can comparable sales be located by Cycle?			
6.1.26. Can comparable sales be located by Effective Year Built?			
6.1.27. Can comparable sales be located by Actual Year Built?			
6.2. Can comparable sales be 'weighted' by each factor above?			
6.3. Can a comparable sales grid be printed include picture images of the comps?			
6.4. Can a report listing be printed of the selected comps?			
6.5. Can appraisal cards be printed of the selected comps?			
6.6. Can comparable PROPERTY be located by same criteria above even if the property has not sold? In other words, can you find LIKE PROPERTY online?			
6.7. Can online comparable sales and comparable property be located by Tax Appraisal year?			
6.8. Will the application return the number of properties found matching each search criteria in the initial search?			
6.9. Can the system be set to default certain criteria from the subject property to use as search criteria in sales comps searches?			
6.10. Can comparable criteria be saved for later retrieval by other users?			

7. Residential Comparable Sales Grid with Automatic Adjustments	Yes	No	Cost to Modify
7.1. Does the system automatically generate a comparable sales grid weighted to the characteristics of the subject?			
7.2. Does the system automatically adjust each individual comp sale component in relation to the subject property?			
7.3. Does the system adjust for Land Market Difference between the subject and comp?			
7.4. Does the system adjust for Year Built Difference between the subject and comp?			
7.5. Does the system adjust for Living Area Difference between the subject and comp?			
7.6. Does the system adjust for each improvement detail segment difference?			
7.7. Does the system adjust for Plumbing differences between subject and comp?			
7.8. Does the system adjust for Fireplace differences between subject and comp?			
7.9. Does the system adjust for Number of Bedrooms between subject and comp?			
7.10. Does the system show the Indicated Value for the subject based on the comps listed?			
7.11. Does the system show the Mean & Median for the subject indicated value?			
7.12. Does the system show the Digital Picture associated with subject and each comp?			
7.13. Does the system allow for this comp grid to be associated with a property record for later retrieval (i.e. BOE Meetings)?			
7.14. Does the system automatically allow for the viewing of such comp grid geographically using GIS coverage areas?			

8. Residential Equity Comp Grid with Automatic Adjustments	Yes	No	Cost to Modify
8.1. Does the system automatically generate an equitable property grid weighted to the characteristics of the subject?			
8.2. Does the system automatically adjust each individual equity component in relation to the subject property?			

8.3. Does the system adjust for Land Market Difference between the subject and equity comp?			
8.4. Does the system adjust for Year Built Difference between the subject and equity comp?			
8.5. Does the system adjust for Living Area Difference between the subject and equity comp?			
8.6. Does the system adjust for each improvement detail segment difference?			
8.7. Does the system adjust for Plumbing differences between subject and equity comp?			
8.8. Does the system adjust for Fireplace differences between subject and equity comp?			
8.9. Does the system adjust for Number of Bedrooms between subject and equity comp?			
8.10. Does the system show the Indicated Value for the subject based on the equity comps listed?			
8.11. Does the system show the Mean & Median for the subject indicated value?			
8.12. Does the system show the Digital Picture associated with subject and each equity comp?			
8.13. Does the system allow for this equity comp grid to be associated with a property record for later retrieval (i.e. BOE Meetings)?			
8.14. Does the system automatically allow for the viewing of such equity comp grid geographically using GIS coverage areas?			

9. Profiling	Yes	No	Cost to Modify
9.1. Does the system allow for profiling of Appraisal and sales information?			
9.1.1. By Neighborhood?			
9.1.2. By Abstract/Subdivision Code?			
9.1.3. By Region?			
9.1.4. By Subset?			
9.1.5. By Query?			
9.2. Does the profile report provide the following statistical functions:			
9.2.1. Mean?			
9.2.2. Median?			
9.2.3. Coefficient of Dispersion?			
9.2.4. Coefficient of Variance?			
9.3. Plot sales ratios on a graph?			
9.4. Provide statistics by overall, improved, and vacant?			
9.5. Does the profiling process for one neighborhood take less than one minute to complete?			
9.6. Does the system allow for mass update of data using a GIS front-end?			
9.7. Can the system adjust neighborhoods to market value based on data in the neighborhood profile?			

10. GIS Connectivity	Yes	No	Cost to Modify
10.1. Does the system provide an integrated GIS system that will provide unparalleled interaction with the CAMA application?			
10.2. Does the system support a live connection to a GIS System?			
10.3. Does the system allow for GIS to be viewed from within application?			
10.4. Does user have control over GIS files to be viewed?			
10.5. Can user have panoramic capabilities in GIS?			
10.6. Can GIS be zoomed in or out?			
10.7. Can user print map?			
10.8. Can GIS display attribute data on map?			
10.9. Is attribute data viewed controlled by user rights?			
10.10. Can user access different properties from GIS?			
10.11. Does GIS locate property?			
10.12. Can data from CAMA be linked using ODBC to GIS?			

10.13. Can images be viewed from GIS?			
10.14. Does system provide a quick, easy, user-friendly process to add GIS files?			

11. Sketch	Yes	No	Cost to Modify
11.1. Does the system provide a powerful integrated sketch tool?			

12. Document Imaging	Yes	No	Cost to Modify
12.1. Does the system provide embedded document scanning and image linking for seamless handling of image and document data?			
12.2. Does the system offer a full service integrated document and digital imaging?			
12.3. Can users scan and attach documents to parcels?			
12.4. Can users append pages?			
12.5. Can user replace pages?			
12.6. Can users delete pages?			
12.7. Can users insert pages?			
12.8. Are codes user defined?			
12.9. Can all users view images?			
12.10. Can the system handle multi-paged documents?			
12.11. Can scanned documents be added?			
12.12. Can system handle *.tif and *.jpg formats?			
12.13. Can system use Microsoft Windows and TWAIN compliant scanners?			
12.14. Are number of images per account unlimited?			
12.15. Does the Improvement image print on Appraisal Card?			
12.16. Can images be easily exported to other folders, applications, or e-mail?			
12.17. Are all licenses required to view images included in cost?			

13. Workflow	Yes	No	Cost to Modify
13.1. Is a centralized workflow system and the affiliated concepts built into the core product?			

14. Portable Field Devices	Yes	No	Cost to Modify
14.1. Does system allow portable field devices to be used for fieldwork?			
14.2. Are the proposed portable field devices Lightweight? Approx Weight: _____			
14.3. Are the proposed devices easy to read in varying types of lighting?			
14.4. Does system provide a quick, easy, user-friendly process to check out and check-in parcels for fieldwork?			
14.5. Does system provide a way to configure or define the user interface on the field device and save it as a template by user? This allows for the screens for a commercial field appraiser to be customized and will be different than that of a screen for a residential field appraiser. This configuration should be available to the County personnel and not require additional programming by the vendor?			
14.6. Is account available for data entry work in office while account is checked out?			
14.7. Does the field device run a full version of the application?			
14.8. Are GIS maps available in field device?			
14.9. Does field device support cameras?			

15. Internet Capabilities	Yes	No	Cost to Modify
15.1. Are new releases and fixes available on the Internet for download?			
15.2. Does the system allow for live publishing of Appraisal Information on the Internet?			
15.3. Does the system allow support tickets to be entered and monitored on the Internet?			
15.4. Is your help system available on the Internet?			

16. Exporting Capabilities	Yes	No	Cost to Modify
16.1. Can search results be exported to the following formats:			
16.1.1. Tab delimited			
16.1.2. CSV			
16.1.3. XML			
16.1.4. HTML			
16.1.5. XLS			
16.1.6. text file			
16.2. Ability to send the results to an Inbox within the network.			

17. Miscellaneous	Yes	No	Cost to Modify
17.1. Can the screens be customized per role or per user?			
17.2. Can the labels on the screen be customized?			
17.3. Is there the ability to modify search results output by user defining the fields and saving the output under a different file name?			

VII. TREASURER TAX COLLECTIONS CAPABILITIES

1. Bill Records	YES	NO	Cost to Modify
1.1. Does the system support multiple tax district and levy collections?			
2. Identification of a Tax Bill	YES	NO	Cost to Modify
2.1. Can the user identify tax bills on the system by parcel?			
2.2. Can the user identify tax bills on the system by statement number?			
2.3. Can the user identify tax bills on the system by taxpayer?			
2.3.1. If so, can the user identify by First and Last Name?			
2.4. Can the user identify tax bills on the system by DBA?			
2.5. Can the user identify tax bills on the system by Phone Number?			
2.6. Can the user identify tax bills on the system by Bill ID?			
2.7. Can the user identify tax bills on the system by Situs?			
2.8. Can the user identify tax bills on the system by Cross-Reference ID?			
2.9. Can the user identify tax bills on the system by Abstract/Subdivision?			
2.10. Can the user identify tax bills on the system using a combination of any of the above?			
3. Maintenance of a Tax Bill	YES	NO	Cost to Modify
3.1. Does the system keep track of unlimited years of tax bills?			
3.2. Can the user manually modify an existing bill?			
3.3. Can the user automatically modify existing bills through supplements?			
4. Payment of a Tax Bill	YES	NO	Cost to Modify
4.1. Can payments be grouped in batches?			
4.2. Can the user pay all bills for a taxpayer or parcel at once?			
4.3. Can the user pay bills for a taxpayer for multiple properties at once?			
4.4. Can the user pay selected bills at once using a mouse to point & click on the bills to pay?			
4.5. Can the user specify by year what bills to pay?			
4.6. Can the user specify by entity what bills to pay?			
4.7. Can the user see assessed information on a bill selected to be paid?			
4.8. Can the user see exemption information on a bill selected to be paid?			
4.9. Can the user see taxable information on a bill selected to be paid?			
4.10. Can the user see the levy rate on a bill selected to be paid?			
4.11. Can the user see the original tax on a bill selected to be paid?			
4.12. Can the user see current tax due on a bill selected to be paid?			
4.13. Can the user see the Penalty & Interest due on a bill selected to be paid?			
4.14. Can the user see complete transaction history on a bill selected to be paid?			
4.14.1. If so, can the user see this information split out by payments and refunds?			
4.15. Does the user have multiple methods of payment available to them when paying a bill?			
4.16. Can the user accept a partial payment on a tax bill for certain exception items such as bankruptcy items?			
4.17. Can the user accept an overpayment on a tax bill?			
4.17.1. If so, can the user set the overpayment up for a refund?			
4.18. Can the user indicate "Paid By" other than the owner of the parcel?			
4.19. Can the user indicate a check number on a payment?			
4.19.1. If so, can the user indicate driver's license number, expiration date and state?			
4.19.2. Can the user accept multiple checks as payment on a single transaction?			
4.19.3. Can the user accept multiple tender types on a single transaction?			
4.19.4. Can the user indicate 'paid under protest' as part of the payment transaction?			

4.19.5. Can the user generate a report of all payments made 'under protest'?			
4.20. Can the user generate a receipt when posting a payment?			
4.21. Can the user void a payment and have the system recognize all bills that were paid by that payment, thus setting those bills up as status due?			
4.22. Can the user flag a bill for refund due when there is an overpayment or a change in tax?			
4.23. Does the system keep a user id, time and date stamp on all transactions that occur (i.e. payments, refunds, corrections, etc.)?			
4.24. Does the system support calculation and posting of half payments?			
4.25. Does the system allow postings using wand barcode readers?			
4.26. Does the system support a validator for check payments?			
4.27. Does the system support cash drawers?			
4.28. Does the system support check imaging as part of the payment transaction?			
4.29. Does the system support lockbox processing electronically?			

5. Tax District Identification	YES	NO	Cost to Modify
5.1. Can multiple Tax Districts and Levies be defined on the system?			
5.2. Can multiple Tax Districts and Levies be collected and distributed for on any given parcel?			
5.3. Can levy rates be defined by levy by year?			
5.4. Can Penalty and Interest schedules be defined by Tax District by year?			

6. Special Assessment and Local Improvement District Identification	YES	NO	Cost to Modify
6.1. Can multiple Special Assessments be defined on the system?			
6.2. Can multiple Special Assessments be collected for on any given parcel?			
6.3. Can Special Assessments be defined by year?			
6.4. Can Penalty and Interest schedules be defined by Special Assessment by year?			

7. Mortgage Company Identification & Processing	YES	NO	Cost to Modify
7.1. Can mortgage company codes be created on the system?			
7.2. Can mortgage company codes be assigned to a parcel?			
7.2.1. If so, can an account number be specified?			
7.3. Can information be generated electronically & sent to a mortgage company for payment?			
7.4. Can information be received electronically from a mortgage company for payment processing?			

8. Miscellaneous Fee Tracking	YES	NO	Cost to Modify
8.1. Can Miscellaneous Fees be maintained and paid on the system?			
8.2. Can Miscellaneous Fees be assigned to someone other than a parcel owner?			
8.3. Can Miscellaneous Fees be paid easily and efficiently at the same time tax bills are paid by a taxpayer?			
8.4. Can codes be generated to identify different types of Miscellaneous Fees?			
8.5. Are statements generated for outstanding miscellaneous fees?			

9. Refund Processing	YES	NO	Cost to Modify
9.1. Can the user search for outstanding refunds?			
9.2. Can the user generate refunds in mass?			
9.3. Can a report be generated for refunds that are to be paid?			
9.4. Can a report be generated to show refunds that have been paid?			
9.5. Can checks be generated for refunds that are processed?			

10. Advance Tax Payment Processing	YES	NO	Cost to Modify
10.1. Can the user post advance tax payments for the future year?			
10.2. Can the user apply advance tax payments in mass toward the taxes once the tax bills are created?			
10.3. Can a report be generated to show advance taxes that have been paid?			
10.4. Does the system display an escrow balance to the user when accessing a parcel?			
10.5. Does the system generate receipts for taxes paid?			
10.6. Does the system generate a statement of taxes due?			
10.7. Once the Assessor “tags” an account for Advance Tax collect, will this “tag” roll into the tax system and “tag” the account?			
10.8. Ability to print a report from the tax system, which shows what accounts are tagged for Advance Tax collect.			
10.9. Ability to generate a reconciliation report of those accounts that paid Advance Tax.			

11. Real Estate Excise Tax Processing	YES	NO	Cost to Modify
11.1. Can the user provide the taxpayer with an estimate of Real Estate Excise to be paid?			
11.2. Does the application calculate the Excise Taxes to be paid based on the Tax Code Area, the Sale Amount, the Sale Date and the Transaction type?			
11.3. Can the user post a payment of property taxes along with Real Estate Excise Taxes and Advance Taxes in one transaction?			
11.4. Can the user create a REET record that captures all of the required REET information provided on the Affidavit?			
11.5. Can the user generate REET export as defined by the DOR?			

12. State Submission Reports	YES	NO	Cost to Modify
12.1. Does system print property reports on state format?			
12.2. Does system print Stratification reports on state format?			
12.3. Do the state assigned errors show on recalculation error report?			

13. Rolls & Statement Processing	YES	NO	Cost to Modify
13.1. Can the system produce Levy Rolls & Statements for each entity or any combination of entities?			
13.2. Can the system produce Supplemental Rolls & Statements for each entity or any combination of entities?			
13.3. Can the system automatically update records with supplemental data rather than having to do it manually?			
13.4. Can the system produce Delinquent Statements and 2nd Notices?			
13.5. Can a roll be accessible for printing at any time?			
13.6. Can statements be generated for a single entity on one statement?			
13.7. Can statements be generated for combined entities on one statement?			
13.8. Can the system generate a delinquent tax roll for both current year delinquents and prior year delinquents?			

14. Event Tracking	YES	NO	Cost to Modify
14.1. Does the system track events on a parcel, such as Tax Statement Generated, Delinquent Notice Generated, etc.?			
14.2. Does the system allow the user to enter manual events on a parcel?			
14.3. Does the system allow the user to view all events, both Treasurer’s Office and County, associated with a parcel?			
14.4. Does the system allow users to view only events generated by the Treasurer’s Office for parcels?			
14.5. Does the system allow the user to view only events generated by the County for a			

parcel?			
14.6. Does the system allow for “objects” to be attached to events? Objects such as images, pictures, video clips, sound clips, word documents, excel documents, etc.			
14.7. Allow for journal notations on an account parcel and/or parcels.			

15. Returned Mail Processing	YES	NO	Cost to Modify
15.1. Can the system process mail that is returned?			
15.2. Does the system track returned mail by codes and dates returned?			
15.3. Does the system provide a report of taxpayers with returned mail information?			

16. Mobile/Manufactured Homes and Personal Property	YES	NO	Cost to Modify
16.1. Does the system track mobile home serial numbers?			
16.2. Does the system track mobile home label numbers?			
16.3. Does the system track mobile home model numbers?			
16.4. Ability to view personal property board slips?			
16.5. Ability to produce delinquent personal property tax reports for personal property, mobile/manufactured homes, distraint and sales?			

17. Litigation Tracking	YES	NO	Cost to Modify
17.1. Does the system allow tracking of all litigation events on a parcel?			
17.2. Does the system keep a history of all litigation events on a parcel?			
17.3. Does the system provide reporting for litigation events on a parcel?			
17.4. Does the system allow multiple parcels to be included on a litigation event?			

18. Disbursement Check Processing	YES	NO	Cost to Modify
18.1. Does the system generate disbursement checks to the Tax Districts and Special Assessment Districts?			
18.2. Does the system generate an export of all accounting transactions?			
18.3. Does the system allow for the set up of GL account codes based on the system events?			

19. Installment Agreement Processing	YES	NO	Cost to Modify
19.1. Does the system allow multiple parcels to be attached to the same installment agreement?			
19.2. Does the system generate a payment schedule based on information supplied by the user?			
19.3. Does the system allow the user to override a payment amount or date on an installment?			
19.4. Does the system allow the user to cancel an installment agreement?			
19.5. Does the system provide a way to automatically cancel an installment if a payment is missed?			

20. Reporting	YES	NO	Cost to Modify
20.1. Does the system provide balancing reports by batch?			
20.2. If so, will the report break the postings out by user?			
20.3. Does the system provide distribution reports by batch?			
20.3.1. If so, do the reports break Levies, Special assessments, Fees, Advance Taxes (escrow), Overpayment Credits?			
20.4. Does the system provide collections reports by batch?			
20.4.1.1. If so, do the reports break out Levies, Special assessments, Fees, Advance Taxes (escrow), Overpayment Credits?			
20.5. Does the system provide refund reports by batch?			
20.5.1.1. If so, are there an unpaid refund report and a paid refund report?			

20.6.	Does the system provide escrow payment reports?			
20.7.	Does the system provide a recap report?			
20.8.	Does the system provide an original roll report?			
20.9.	Does the system provide a variance report?			
20.10.	Does the system provide an outstanding bill report?			
20.11.	Does the system provide a partial payment report?			
20.12.	Does the system provide a complete bill listing report?			
20.13.	Does the system provide a return check report?			
20.14.	Does the system provide a miscellaneous fees report?			
20.15.	Does the system provide a modified bill report?			
20.16.	Does the system provide a security audit report?			
20.17.	Does the system provide a litigation events report?			

21. Rollbacks	YES	NO	Cost to Modify
21.1. Does the system provide a quick, easy, user-friendly process for adding up Current Use and DFL removal Taxes?			
21.2. Does the system do all calculations automatically for both Current Use and DFL removal Taxes?			
21.3. Does the system allow multiple rollbacks on a property at a time?			
21.4. Does the system provide a calculation worksheet of potential back taxes to be given to the taxpayer?			
21.5. Does the system automatically update the tax bill information when a Current Use and DFL removal tax is created, if the user indicates this should be done?			

22. Code Files	YES	NO	Cost to Modify
22.1. Does the system provide maintenance for creating Batch records?			
22.2. Does the system provide maintenance for creating User ID records?			
22.3. Does the system provide maintenance for creating Country Code records?			
22.4. Does the system provide maintenance for creating Mail Type Code records?			
22.5. Does the system provide maintenance for creating Mail Return Type Code records?			
22.6. Does the system provide maintenance for creating Phone Type Code records?			

23. Audit Trail on Activity	YES	NO	Cost to Modify
23.1. Does the system keep a user ID, time and date stamp on all transactions that occur?			
23.2. Does the system track changes to all fields on the system?			
23.2.1 If so, can the fields that are tracked be defined by the system administrator?			
23.3. Is there appropriate reporting on these changes that are tracked?			

24. Archive & Purge	YES	NO	Cost to Modify
24.1. Does the system provide the ability to purge information from the system?			
24.1.1. If so, can the data being purged be archived on the system so it can still be accessed for viewing?			

25. Miscellaneous	YES	NO	Cost to Modify
25.1. Does the system have complete "Paid By" tracking?			
25.2. Does the system handle tax freezes?			