

Phase III Testing Scenarios

Test Area 1: Property Tax Management System Help Functionality

Purpose: Ensure that the property tax management system includes a context-sensitive help tutorial suitable for use by new operators. <50 IAC 26-3-14>

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

Purpose: Verify that an operator with the appropriate security level can perform basic modifications to a record. Verify that the property tax management system prevents erroneous data entry and provides readily noticeable indicators of data entry incompatible with 50 IAC 26. <50 IAC 26-3-12, 50 IAC 26-6-10, 50 IAC 26-7-26, 50 IAC 26-12-1, 50 IAC 26-13-1, 50 IAC 26-14-1>

Perform a total of four tests from the options immediately below - two per each county office. The county users may choose which four tests to demonstrate. The Department recommends performing these tests based on actual information that is pending data entry into the property tax management system - as opposed to creating a test record - when possible.

1. Enter a sales disclosure record into the sales disclosure system.
2. Enter a personal property filing into the personal property assessment system.
3. Enter an appeal into the assessment system.
4. Add an improvement to an existing real property record in the assessment system. 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 in the tax and billing system.
6. Perform a combination on two active real property records in the tax and billing system.
7. Perform a transfer of ownership on a real property record in the tax and billing system.
8. Change the mailing address on a real property record in the tax and billing system.
9. Change the parcel number on a real property record due to annexation in the tax and billing system.
10. Enter a correction of error in the tax and billing system.

Test Area 3: Property Tax Management System Forms and Reports

Purpose: Ensure management and State-mandated reports are available on demand in an electronic format (e.g., .xls, .pdf) to county assessors, county auditors, and county treasurers, or designated officials within other county offices. <50 IAC 26-10-3, 50 IAC 26-11-3>

- Tests:**
1. Have the county user generate and display a standard, pre-formatted form/report for each of the following items listed below, using either Pay 2019 or Pay 2020 values:
 - a. Notice of valuation (Form 11) from the assessment system
 - b. The ratio study and corresponding "Workbook" from the assessment system (can be performed on a subset of data as opposed to the entire county dataset)
 - c. A property record card from the assessment system
 - d. A statement of taxes and assessments (TS-1) from the tax and billing system
 - e. Lock modification tracking document as prescribed by the Department from the tax and billing system

Test Area 4: Record Retrieval by Characteristic

Purpose: Verify that property tax management system operators can retrieve all data on a parcel by entering certain characteristics. Verify that property tax management system operators can perform partial searches and wildcard searches and filter results based on active and/or inactive status. <50 IAC 26-4-2, 50 IAC 26-5-1>

- Tests:**
1. Have the county user enter a (State 18 digit) 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 corresponding 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.

Please note that the testing evaluator may ask to see the following items from several of the records generated from these search results:

- AV allocations screen
- GIS data linked to the parcel (pertains to real property records in the CAMA system only)
- Unique Identifier Number for a personal property filer (pertains to personal property records in the personal property assessment system)

Test Area 5: Maintenance of Data from Prior Years

Purpose: Demonstrate that the property tax management system can maintain and make available for electronic retrieval historical year data. <50 IAC 26-6-5, 50 IAC 26-6-6, 50 IAC 26-6-7, 50 IAC 26-6-8, 50 IAC 26-6-9, 50 IAC 26-7-25>

- Tests:**
1. Have the county user access one real property record, one annually assessed mobile home record, one personal property record, and (where applicable) one oil or gas record from the 2017 Pay 2018 cycle.