SECTION A - GENERAL FUNCTIONAL REQUIREMENTS

			Date		
		Tested by	Tested	Pass/Fail	Comment:
A.1. Parcel Identification					
	System provides for a unique identification for each parcel.				
A. 2. Owner (Assessee) Identification					
1	System allows a search of all parcels by assessee name(s).				
2	System must track and display all owners for an individual property.				
3	System provides secure storage of Social Security Account Numbers and/or Federal Taxpayer Identification Numbers.				
4	System uses an appropriate format to store the names of assessees who are persons versus those of those that are other entities.				
5	System distinguishes between assessees that are persons, including married or domestic partenrs, and those that are other entities such as businesses, joint tenants, trusts or trustees, etc. by using table driven codes that are user defined.				
6	System maintains assessee names in the same format for all rolls (Secured, Unsecured, Supplemental, etc)				
A. 3. Standard Screen Displays					
1	System provides facility to navigate easily between screens.				
2	System provides information on the parcel display screen including but not limited to:				
	the parcel identification				
	situs				
	legal description				
	assessee				
	mailing address				
	tax rate area				
	tax rate				
	Open Space identification, Section 11, TPZ				
	Business Account Number				
	values of land, improvements, Trade Fixture Improvements (TFI), Personal Property, and Manufactured Homes				
	tax exemption amount and type (including homeowner and class exemptions)				
	taxes owed, payment status, and assessment year				
	Personal Property Statement Penalty				
3	System provides a GUI that allows simple and quick access.to this data.				
4	System provides for multiple instances of the application.				
5	System displays assessment data for every roll year it contains.				
6	System tracks and displays delinquent taxes for each parcel, including previous parcel numbers changes.				
7	Roll change information can be entered directly onto the System.				
8	System creates and displays a browseable list of all assessees and allows a selection to be made from that list.				
9	Parcel display includes a browseable list of other parcels under the same assessee and allows a selection from that list.				
10	System tracks owner's name(s), assessees, Social Security Account Number (or Taxpayer ID), property location (description or situs), mailing addresses, telephone number, recording information and displays them on the appropriate screen.				
11	System displays all categories of ownership, including persons who are not owners but are listed as assessees "by demand" (Section 610 of the Revenue and Taxation code) or "Unknown Owners" " (Section 611 of the Revenue and Taxation code)				
A. 4. Rate Structure and Tax Rate Areas					
1	System provides for tax rate structure including (1) Tax Rate Area (2) Tax Rate Area Taxing Entities (3) Taxing Entity Individual Funds.				
2	System will interface with or import Tax Rate Area Code Tables from the State Board of Equalization.				
3	Changes to the rate structure can be made on-line and system provides TRA maintenance report to verify changes.				
4	System can apply "mass" tax rate area code changes to parcels.				
5	System provides security controls for the rate structure that prevents unauthorized changes.				
6	System retains historical tax rate area information to allow for cross-referencing to current tax rate area information for apportionment purposes.				
7	System accommodates a Four digit tax code.				

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8	System accommodates a Six digit fund number formatted as: 0001-01 (four-digit fund number and two digit suffix). Format can be altered should the County elect to purchase a new financial system.				
9	System accommodates a Six digit tax rate area number formatted as 001-020.				
10	Format can be changed if mandated by the Board of Equalization.				
11	System supportsTax agency names with up to 18 characters.				
12	Tax rate area information in the system be accessed, summarized, and reported in any one or a combination of the following orders: Tax Code, Fund Number, Tax Rate Area, Tax Agency Name, parcel identification.				
13	System provides certified value reports.				
14	System provides a report with certified values per tax rate area sorted by fund number				
15	Report provides the number of parcels in each tax rate area.				
16	Report includes tax rate areas that have no value.				
17	Report provides breakdowns on the value and number of parcels for each type of roll (secured, unsecured, unitary).				
18	System provides for maintenance of the relationship between a parcel's identification and its TRA. System provides for assignment of tax rate areas to new parcels resulting from a parcel split or combination.				
19	System retains and can report a history of a parcel's prior tax rate areas. The history provides the roll years for each TRA in the parcel's history, is accessible the the system display and provides a list or display of all parcels in a given TRA for a given roll year.				
A. 5. Mailing Address Maintenance					
1	System will interface with the US Postal Service system.				
2	System provides mailing sort capability for bulk mailings.				
A. 6. Current On-Line Customers					
1	System provides will interface with local title companies and other entities having access to assessment data.				
2	System will track and create an audit log of all changes made.				
3	System will export and allow the import of data.				

			Date		
		Tested by	Tested	Pass/Fail	Comment:
B. 1. Assessment Rolls					
1	System tracks assessments on the Secured Roll, Unsecured Roll, Supplemental Roll, Delinquent Roll and any other assessment rolls required by law.				
2	System identifies and trakcs Manufactured home assessments				
3	System identifies and tracks Separately Assessed Improvements (SAI) and Possessory Interest (PI) parcels and links them to the secured parel on which they are situated.				
4	System identfies and distinguishes between non-assessable tax exempt properties and assessable properties that have exemptions.				
5	System will track non-assessable tax exempt properties on all assessment rolls				
6	System tracks State assessed parcels on the local roll.				
7	System tracks and provides a listing of Government Owned Properties.				
8	System works with an unlimited number of roll years.				
9	System provides a report that shows the secured, unsecured and total assessed values and parcel counts for each city, total cities, outside of cities, and total County.				
10	System provides a report comparing the current and prior total assessed valuations by category and parcel count, and including percent increase and decrease, for each city, total cities, outside of cities, and total County.				
11	System provides separate reports, similar to those described above, for special assessments.				
B. 2. Situs and Legal Descriptions					
1	System can track multiple situs addresses for each parcel.				
2	System allows more than one parcel to have the same situs address.				
3	System tracks addresses using US Postal Service conventions.				
4	System allows for user defined addresses for foreign address conventions.				
5	System provides for a brief narrative description of the property.				
B. 3. Parcel and Ownership Maintenance					
1	System can apply/update new APNs to the record and the change carries through to all appropriate associated records.				
2	System creates a print file of notices to the owner reflecting the change in APN.				
3	System creates print files of all legally required notices.				
4	System produces a file or list (especially for book splits) containing newly created APN, deleted APN, and administrative APN changes.				
5	System stores the date a parcel was added and/or removed from the roll.				
6	System tracks and displays all ownership interests in each parcel.				
7	System provides for each owner to be listed with their respective interest ownership type denoted.				
8	System stores the following items:				
	The percentage of the owner's interest				
	The date the deed was recorded				
	The instrument number of the recorded deed				
	The way the title is held (e.g., individual, joint tenants, tenants in common, etc.)				
	Whether the owner is tax-exempt, a utility, or tax defaulted				
9	System maintains ownership for unlimited roll years.				
10	System is able to display the owners of a parcel for any given roll year.				
11	System maintains and displays a history of ownership changes for a parcel, including partial ownership and undivided interest changes				
12	System provides for an "In Care Of" name associated with the assessee and in the same format as the assessee.				
13	System allows for the designation of persons other than the parcel's assessee as recipient for various correspondence such as Personal Property Statements and Homeowner Claims.				
14	System contains a "Doing Business as" (DBA) name.				
15	System maintains the owner of record for each tax year and may be corrected if needed. Supplemental assessments read the owner of record for each year the supplemental is effective.				
16	The System allows for the export of data for sale, distribution or archival purposes.				

			Date		
		Tested by	Tested	Pass/Fail	Comment:
17	System includes on the certified roll all data required by law.				
18	System allows for the auditing of work entered within a user defined time frame.				
19	System allows for remarks or comments to be inserted where appropriate.				
20	System can flag ownership transfers involving the following:				
	Land only				
	Improvements only				
21	System provides for a mass change of the name and/or address by entering a list of APNs.				
22	System can display images of documents including deeds, maps, sketches, and photographs.				
23	These documents images can be displayed simultaneously with other data screens on the same monitor while allowing user input to same.				
24	Image viewing has zoom capabilities.				
25	Such document images can be related to property records so that images are displayed by default or through choice menu(s).				
26	System can input and output image files in any standard format (BMP, TIFF, JPG, PNG, etc.)				
27	Document image files can be imported from other sources.				
28	Image files may become resident on the system be intergrated with other imaging software.				
29	System maintains identification of "Senior Citizen Postponement of Taxes" on parcels.				
B. 4. Property Sales					
1	System captures and maintains ownership changes with sales information. The system also processes the Change In Ownership Statement and it's related penalty process (Revenue and Taxation Code section 482).				
2	System includes, for each transfer, a user defined list of data, including:				
	Parcel number				
	Recording Date and Instrument number				
	Transfer Tax				
	Ownership Change Date				
	Type of Sale				
	Property Use Code				
	Situs or narrative				
	Name and Address of Buyer				
	Date form mailed				
	Billed or Abated Code				
	Financing amount and type				
	Percent of interest of transfer				
	Date letter returned				
	Penalty Due Date (Expiration Date)				
	Date added and changed				
	Verification code				
	Sales price				
3	System can print file for both a letter or a sales letter.				
4	System keeps unlimited years of transfer history.				
5	System tracks and displays the entire transfer history for each parcel.				
6	Users can be selective in their retrieval (i.e. APN range, use, book).				
7	System allows for corrections to the transfer information.				
8	System allows for the identifcation of the type of sale (multiple APN, family, interspousal, fractional interest, etc.				
9	System allows appraisers to begin valuing property as soon as a new sale is recorded.				
10	System will initiate and track the Change of Onwnership letter and apply a penalty as appropriate.				
12	System allows the user to indicate whether or not a homeowner's exemption may apply.				
13	System can produce a display or listing of buyers who have not responded to notices and correspondence within a user-defined period on demand.				
14	System can produce a display or listing of new sales occurring within a user-defined period.				
15	Entry of the sale generates a record for processing by Real Property valuation.				

		Tested by	Date Tested	Pass/Fail	Comment:
16	System tracks and provide reports to the State Board of Equalization as required by law, including:				
	Property transfers between parents and children exempted from revaluation				
	Transfer of base year values from one property to another for persons fifty-five years of age and older and disabled				
17	System can create a quarterly listing of sales as required under Section 408 of the Revenue and Taxation Code.				
B. 5. Exemptions					
1	System provides for multiple exemptions on a single property.				
2	System prints Homeowner Exemption Claim Forms whenever requested.				
3	System selects the properties for printing the claim forms as defined by the County.				
4	System tracks all data necessary to properly evaluate and apply a Homeowner Exemption Claim.				
5	System calculates the Homeowner Exemption amount as appropriate.				
6	System checks and identifies duplicate social security numbers for Homeowner Exemptions.				
7	System flags and identifies for removal an exemption for the year in which ownership change occurs.				
8	The system tracks and applies the correct exemption amount at the close of each roll.				
9	The system creates a print file for all annual exemption claim forms.				
10	The system indicates that a parcel has both Homeowners and class exemptions.				
B. 6. Real Property					
1	System tracks all reappraisable events, including changes of ownership, new construction, Prop 8 reviews, etc.				
2	System generates a supplemental assessment and notice as appropriate.				
3	System produces the supplemental notices upon request.				
4	System stores Supplemental Assessment Notice mailing date.				
5	System will display supplemental assessments showing all relevent data.				
6	System certifies supplemental assessments through an interface that allows the Auditor to accept or decline the supplemental.				
7	The system certifies upon request.				
8	The system automatically prorates supplemental assessments as appropriate, applying values to the proper assessment rolls.				
9	System tracks multiple base years, including value and percentages, for multiple owners.				
10	System tracks the CPI for each assessment year and applies it as appropriate.				
11	The system identifies Partially Complete constructions by percent complete.				
12	The system tracks and calculates values for improvements that are partially complete over multiple assessment years.				
13	The system generates user configurable reports of reassessable events.				
14	The system provides a user defined list of comparable sales.				
15	When a new parcel is established on the roll, the system provides a method for establishing beginning values for both the current roll year and for the roll being prepared.				
16	System provides for direct enrollment and/or other methods of mass appraisal.				
17	System maintains a user configurable list of property characteristics for each parcel.				
18	System maintains a user configurable list of property characteristics for each building on the parcel, including:				
	Effective year				
	Year Built				
	Lot width and depth				
	Garage square footage				
	Addition square footage				
	Air conditioning type				
	Base year				
	Number of bedrooms				
	Number of baths				
	Number of stories				
	Number of apartment units				
	Number of buildings				
	Number of fireplaces				

		Tested by	Date Tested	Pass/Fail	Comment:
	Swimming pool size (Width & Length)				
	Neighborhood code				
	Building class				
	Zoning				
	1st floor square footage				
	2nd floor square footage				
	Basement square footage				
19	System maintains a user configurable list of information for Manufactured Home assessments, including:				
	Parcel identification				
	Vehicle identification number (VIN)				
	Vehicle license number				
	Make				
	Model				
	Year made				
	Number of units (doublewide, etc.)				
	Lien owner and address				
	Manufactured home status				
	Park space number				
	Value				
20	Manufactured home assessment displays can be accessed by a search from any relevent fields.				
21	The system provides for storage and maintenance of information on Manufactured Homes not on the assessment roll but registered with the California Department of Housing & Community development.				
22	System can track non-assessable manufactured homes.				
23	The system automatically calculates the value of Manufactured Homes using cost tables.				
24	The system generates annual Value Notifications as required by law.				
25	The system retains the appraiser's ID for valuations.				
26	System allows for a user defined identification of the use of the parcel.				
27	System should track each activity for purposes of a productivity report.				
B. 7. Open Space (Williamson Act) Parcels					
1	System stores user defined information for Open Space parcels, including:				
	Contract numbers				
	Non-renewal year				
	Base year value for land				
	Market value for land, living improvements, other improvements, manufactured homes				
	Total acreage				
	Homesite acres and value				
	Labor housing acres and value				
	Where there are multiple land areas on a parcel, each area, their rents and acres				
	Where there are multiple living improvement areas, each area, the type of planting on each area, rent on each area, production for each area, year each area planted, year each area grafted, acres for each area				
2	System is capable of tracking multiple land and planted areas and calculating the appropriate open space values.				
3	The system enrolls the lesser of base year value plus CPI, market value, or open space value.				
4	The system handles non-renewal valuations.				
5	The system displays and prints the restricted value calculations for an individual parcel.				
6	The system provides for automated subvention processing to the State, showing tax loss to county for each individual parcel.				
7	System should allow the creation of user definable questionnaires or reports.				
8	The system allows for Citrus Pest Control assessments.				
9	The system allows for creation of user defined special assessment districts.				
10	The system identifies parcels with speciala easements.				
B. 8. Roll Correction					
1	System allows for an unlimited number of escaped assessments and corrections.				
2	For these changes the System updates and makes changes to all related activities on any appropriate assessment roll.				
B. 9. Personal Property					
1	System uniquely identifies each personal property assessment account.				
2	System determines and reports assessees who are to be audited according to statutory law.				
3	The system includes all branches of a business in determining the value category of an assessee.				
4	Users can define additional categories.				

			Date		
		Tested by	Tested	Pass/Fail	Comment:
5	The system has user-definable and user-maintainable codes for the audit type.				
6	Users can select assessees for audit based on last year audited and audit type.				
7	The system can download onto a PC for personal property audits.				
8	System tracks the filing of Property Statements and calculates appropriate penalties.				
9	System establishes estimated values for accounts when a property statement is not filed.				
10	System supports auditor remarks for Personal Property Accounts. Remarks are printable on the appropriate form by user designation.				
11	System will provide access to all assessee and ownership history for all assessment rolls.				
12	System has an automated process for calculating the value of Trade Fixture Improvements and Personal Property.				
13	System uses the appropriated methodolgy to calculate personal property assessments including user defined depreciation tables.				
14	System allows entry of the year and cost of individual items of personal property and TFI.				
15	The system will compare current calculated values to last year's value and flag significant differences.				
16	System tracks user defined boat characteristics, including:				
	Make				
	CF#				
	Year built				
	Hull material				
	Propulsion type				
	Boat type				
	Boat use				
	Length in feet and inches				
	Paper issue date				
	Purchase date				
	Situs County code				
	Owner County code				
	License type				
	Year registered				
	Purchase price				
	Motor make				
	Motor model				
	Motor horsepower				
	Motor year manufactured				
	Motor purchase price				
	Boat location (situs address)				
17	Boat information can be retrieved by the boat's CF number.				
18	System should interface with the DMV's Boat Update.				
19	System should property calculate boat values using the appropriate schedules and methodology.				
20	Aircraft are identified as personal property.				
21	System tracks user defined aircraft characteristics, including manufacturer, model, location, and tail number.				
22	The system stores the aircraft's usual location.				
23	Aircraft information can be retrieved by the aircraft's tail number.				
24	System should properly calculate aircraft values using the appropriate schedules and methodolgy.				
25	The system prepares the annual aircraft report required by the State.				
26	The system allows for the Standard Land Use Code (SLUC) to be used to access appropriate schedules.				
27	The system produces a report showing average values per SLU Code.				
28	System allows for all appropriate Property Statements to be mailed annually for each personal property assessment account.				
29	System should separately track all information on assessees of Possessory Interests, Separately Assessed Improvements and all other assessments where the property assessed is separately owned from the physical parcel on which it is located.				
30	System should retrive Personal property information from user defined fields, including.				
	Assessee name				
	Personal property owner name				
	Parcel identification				

		Tested by	Date Tested	Pass/Fail	Comment:
	Account number				
	DBA name				
	Address, (situs and mailing).				
31	System should make appropriate changes to Personal Property assessments that are affected by changes in the underlying parcel, such as parcel splits, number changes, and ownership changes.				
32	System should transfer Personal property assessments from secured to unsecured, secured to secured, and unsecured to unsecured, as appropriate.				
33	System should support the process of penalties for non-filed Property Statements.				
34	System identifies zero assessments with a special flag.				
35	System separately totals assessments for the secured and unsecured rolls.				